



State of
**Coastal and Marine
Nature-Based Tourism**
in the Western Indian
Ocean (WIO) Region

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DISCLAIMER

Although every attempt was made to collect data from as many sources as possible, both online and from numerous, varied other sources, this report is in no way exhaustive and there are a number of data gaps. For a number of the coastal and marine nature-based tourism the 'latest' available data was often still 5-15 years old, highlighting a major gap in terms of relevant, recent, robust data to measure the value of the coastal and marine nature-based tourism in the Western Indian Ocean region. The authors have taken care to ensure that the material presented in this report is accurate and correct. However, the authors do not guarantee the accuracy of the data or material contained in this report, and accept no legal liability or responsibility connected to its use or interpretation.

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CONTENTS

1. Overview of the report	6
1.1 Methodology.....	7
1.2 Limitations and caveats	7
2. Introduction	8
2.1 Context and background	9
2.1.1 Overview of the blue/ocean economy	10
Text box 1: UNWTO's definition of ecotourism	12
Text box 2: Blue Tourism Initiative: sustainable blue tourism in the WIO region	12
2.1.2 Natural resources and biodiversity in the Western Indian Ocean (WIO) region.....	13
2.1.3 Coastal and marine habitats	14
2.1.4. Biodiversity.....	14
2.1.5 Ecological and socio-economic importance, threats and pressures	14
2.2 Policy and regulatory environment.....	15
2.2.1 Policy analysis for the region.....	15
2.3 Wildlife Economy Investment Index (WEII).....	19
2.4 Conclusion	20
2.5 References	20
3. Defining coastal and marine nature-based tourism	24
3.1 Defining coastal and marine nature-based tourism (NBT).....	25
Text box 3: Can cruise tourism be considered Nature-Based Tourism (NBT)	26
3.2 Research related to coastal and marine tourism.....	29
3.2.1 Bibliometric analysis of nature-based tourism in the WIO	29
Text box 4: Established and new forms of coastal and marine tourism	32
3.3 Types of coastal and marine NBT in the WIO region	32
3.4 The value of coastal and marine tourism	35
3.4.1 Global context.....	35
3.4.2 Value of coastal and marine tourism in the WIO region	36
3.5 Conclusion	37
3.6 References	37
4. Comoros	42
4.1 Introduction.....	43
4.2 Statistics and economic significance of coastal and marine NBT	44
4.3 Overview of coastal and marine nature-based tourism activities	44
4.3.1 Beach and coastal nature activities	44
4.3.2 Scuba diving	45
4.3.3 Whale and dolphin watching.....	45
Text box 5: The Mohéli Marine Park: a community-led sanctuary	45
Text box 6: Coelacanth diving in the Comoros	45
Text box 7: Itsamia: Comoros's turtle sanctuary	46
4.3.4 Sea turtle observation	46
4.4 Challenges facing coastal and marine NBT in Comoros	46
4.5 Opportunities for coastal and marine NBT in Comoros	46
4.6 References	47
5. Kenya	49
5.1 Introduction.....	49
Text box 8: Kenya's Blue Economy agenda – driving sustainable growth	50
Text box 9: Shimoni's Fisherfolk-to-Guides programme within the Shimoni-Vanga Joint Co-management Area	50
5.2 Statistics and economic significance of coastal and marine NBT	51
5.3 Overview of coastal and marine nature-based tourism activities	51
Text box 10: Kisite-Mpunguti Marine Protected Area (MPA): A gold standard for conservation	51
Text box 11: Kenya's Eco-Rating Certification Scheme.....	52
Text box 12: Sport fishing in Kenya.....	52
5.3.1 Beach and coastal nature activities	52
5.3.2 Recreational fishing	53
5.3.3 Scuba diving	53

5.4 Challenges facing coastal and marine NBT in Kenya.....	54
5.5 Opportunities for coastal and marine NBT in Kenya.....	54
5.6 References	55
6. Madagascar	58
6.1 Introduction.....	58
6.2 Statistics and economic significance of coastal and marine NBT.....	59
6.3 Overview of coastal and marine nature-based tourism activities.....	59
Text box 13: Community benefits of ecotourism in Masoala National Park.....	60
6.3.1 Beach and coastal nature activities.....	60
6.3.2 Whale watching.....	60
6.3.3 Scuba diving and snorkelling.....	61
6.3.4 Recreational fishing	61
Text box 14: Whale Festival in Sainte-Marie	61
Text box 15: Vezo community-led marine stewardship.....	62
6.3.5 Cruise tourism	62
6.4 Challenges facing coastal and marine NBT in Madagascar	62
6.5 Opportunities for coastal and marine NBT in Madagascar	62
6.6 References	63
7. Mauritius	66
7.1 Introduction.....	66
7.2 Statistics and economic significance of coastal and marine NBT.....	67
Text box 16: Île aux Aigrettes for nature-based tourism	67
Text box 17: The importance of hotel groups in linking coastal and marine NBT, local communities and marine conservation	68
7.3 Overview of coastal and marine nature-based tourism activities.....	68
7.3.1 Beach and coastal activities.....	68
7.3.2 Snorkelling.....	69
7.3.3 Recreational fishing	69
7.3.4 Cruise tourism	70
7.3.5 Whale and dolphin watching	70
7.3.6 Scuba diving.....	70
7.4 Challenges facing coastal and marine NBT in Mauritius.....	71
7.5 Opportunities for coastal and marine NBT in Mauritius.....	71
7.6 References	72
8. Mozambique	75
8.1 Introduction.....	75
8.2 Statistics and economic significance of coastal and marine NBT	76
Text box 18: The importance of public-private partnerships for marine conservation and coastal and marine NBT	76
8.3 Overview of coastal and marine nature-based tourism activities.....	77
8.3.1 Beach and coastal NBT activities	77
8.3.2 Cruise tourism	77
8.3.3 Recreational fishing	77
Text box 19: Sport and recreational fishing in Maputo National Park.....	77
Text box 20: Economic importance of Manta Ray tourism in Mozambique.....	78
8.3.4 Scuba diving and snorkelling.....	78
8.3.5 Dolphin and sea turtle tourism	79
8.3.6 Water sports	79
8.3.7 Whale watching and marine safaris	79
Text box 21: Dolphin tourism in Mozambique: dolphin & whale encounters in Ponta do Ouro Mozambique	79
Text box 22: Whale watching tourism in Mozambique.....	80
8.4 Challenges facing coastal and marine NBT in Mozambique	80
8.5 Opportunities for coastal and marine NBT in Mozambique	81
8.6 References	81
9. Réunion	85
9.1 Introduction.....	85
Text box 23: Cultural commodification amid expanding NBT in Réunion	86
9.2 Statistics and economic significance of coastal and marine NBT	86
Text box 24: Endogenous causes of tourism stagnation in Réunion (1981–2015)	87
Text box 25: Climatic suitability for tourism in Réunion Island.....	87
Text box 26: Coral reef health and marine pressures in Réunion Island.....	87
Text box 27: Social acceptability of Réunion's Marine Protected Area (MPA).....	88

9.3 Overview of coastal and marine nature-based tourism activities	88
9.3.1 Beach and coastal nature activities	88
9.3.2 Recreational fishing	88
9.3.3 Scuba diving and snorkelling	89
9.3.4 Sport tourism	89
9.3.5 Whale and dolphin watching	89
Text box 28: Residents' attitudes towards sport tourism and sustainability on Réunion.....	89
Text box 29: Impacts of whale-watching and swim-with-whales tourism on humpback whales in Réunion Island.....	90
9.4 Challenges facing coastal and marine NBT in Réunion.....	90
9.5 Opportunities for coastal and marine NBT in Réunion.....	90
9.6 References	91
10. Seychelles	93
10.1 Introduction.....	93
10.2 Statistics and economic significance of coastal and marine NBT	94
10.3 Overview of coastal and marine nature-based tourism activities.....	94
Text box 30: Sainte Anne Marine National Park in Seychelles	95
Text box 31: Curieuse Marine National Park	95
10.3.1 Beach tourism	96
10.3.2 Cruise tourism	96
10.3.3 Recreational fisheries	97
10.3.4 Whale watching	97
10.3.5 Whale shark ecotourism	98
10.3.6 Snorkelling and scuba diving.....	98
10.4 Challenges facing coastal and marine NBT in Seychelles	98
10.5 Opportunities for coastal and marine tourism NBT in Seychelles	99
10.6 References	99
11. Somalia	103
11.1 Introduction.....	103
Text box 32: Somalia's marine wildlife.....	104
11.2 Statistics and economic significance of coastal and marine NBT.....	104
11.3 Overview of coastal and marine nature-based tourism activities.....	104
11.3.1 Beach and coastal nature activities.....	105
Text box 33: Socio-economic potential of Saad ad-Dim Island for local communities.....	105
Text box 34: Marine litter on the Somali coast.....	105
Text box 35: Badmaal Project – Laying foundations for sustainable coastal and marine NBT	106
11.3.2 Recreational fishing	106
11.3.3 Marine safaris	106
11.4 Challenges facing coastal and marine NBT in Somalia	107
11.5 Opportunities for coastal and marine NBT in Somalia	107
Text box 36: Maritime terrorism and piracy.....	107
11.6 References	108
12. South Africa.....	110
12.1 Introduction.....	110
Text box 37: The role of MPAs in supporting tourism and coastal livelihoods.....	111
Text box 38: Operation Phakisa: Unlocking South Africa's ocean economy	112
12.2 Statistics and economic significance of coastal and marine NBT.....	112
12.3 Overview of coastal and marine nature-based tourism activities.....	113
Text box 39: Africa's coastal and marine tourism sector gathers momentum.....	113
Text box 40: Socio-economic implications of the sardine run for indigenous communities	113
Text box 41: The impact of Blue Flag status on tourist decision-making when selecting a beach	114
Text box 42: Flock to Marion: A high-value nature-based cruise linking tourism and conservation.....	114
12.3.1 Beach and coastal nature activities.....	114
12.3.2 Cruise tourism	114
12.3.3 Recreational fishing	115
12.3.4 Scuba diving.....	115
Text box 43: Navigating risk and resilience in Sodwana Bay's dive tourism	116
12.3.5 Shark cage diving	116
12.3.6 Whale watching and marine safaris	117
12.4 Challenges facing coastal and marine NBT in South Africa.....	117
12.5 Opportunities for coastal and marine NBT in South Africa.....	117
12.6 References	118

13. Tanzania	122
13.1 Introduction.....	122
13.2 Statistics and economic significance of coastal and marine NBT.....	123
13.3 Overview of coastal and marine nature-based tourism activities	123
Text box 44: Zanzibar	124
Text box 45: Zanzibar coastal and marine tourism activities.....	124
Text box 46: Growing threat of captive turtle tourism in Zanzibar	124
13.3.1 Scuba diving and snorkelling.....	125
Text box 47: Fee adjustments in Zanzibar's Marine Conservation Areas.....	125
Text box 48: Chumbe Island Coral Park - linking tourism, conservation, and community.....	126
Text box 49: Diving, snorkelling, and sailing in Bwejuu Village, Zanzibar.....	126
13.3.2 Beach activities.....	126
13.3.3 Whale watching and dolphin tourism	127
13.3.4 Yachting and sailing	127
Text box 50: Whale watching in Tanzania	127
Text box 51: Turtle conservation and tourism in Tanzania	128
13.3.5 Turtle tourism	128
13.4 Challenges facing coastal and marine NBT in Tanzania.....	128
13.5 Opportunities for coastal and marine NBT in Tanzania.....	129
13.6 References	129
14. Opportunities and challenges in the WIO region	134
14.1 Opportunities	135
14.2 Challenges	137
Text box 52: Beyond the shoreline: Recognising informal livelihoods in the Western Indian Ocean (WIO)'s Marine Nature-Based Tourism	139
14.3 References	140
15. Roadmap for unlocking coastal and marine nature-based tourism in the WIO region.....	142
15.1 Step A: Strengthen policy, legal and regulatory provisions governing natural resources and related to nature-based tourism.....	143
15.1.1 Integrated policies and governance	143
15.1.2 Equitable benefit-sharing policies and programmes.....	143
15.2 Step B: Protect the asset base	143
15.2.1 Resilience and environmental protection	143
15.2.2 Invest in the resource base and its maintenance	144
15.2.3 Sustainable tourism management	144
15.2.4 Conservation and community incentives	144
15.3 Step C: Improve the overall business environment.....	144
15.3.1 Support to local SMMEs	144
15.3.2 Sustainable finance	144
15.3.3 Marketing and awareness raising.....	144
15.3.4 Access to markets and infrastructure.....	144
15.4 Step D: Promote collaboration and partnerships.....	144
15.4.2 Regional cooperation initiatives.....	145
15.4.3 Public-private partnerships	145
15.5 Step E: Improve transparency and data collection & the related monitoring and evaluation.....	145
Text box 53: The Great Blue Wall: an Africa-led ocean initiative	145
15.6 Step F: Build the capacity of all stakeholders to engage in, manage and benefit from coastal and marine NBT	146
15.7 Policy pathways identified by Kepher-Gona et al. (2024).....	146
Text box 54: Possible initiatives and policies to increase the contribution of coastal and marine NBT	148
15.8 References.....	148
Appendix A: Non-exhaustive list of policy and legislation related to coastal and marine NBT in the WIO region	150

Acronyms

ACMMTA – Africa Coastal Marine and Maritime Tourism Alliance

AfCFTA – African Continental Free Trade Area

AfDB – African Development Bank

AGEM – *Association des Guides Ecotouristiques de Masoala*

ANAC – Mozambique National Administration of Conservation Areas

BAF – Blue Action Fund

BIOPAMA – Biodiversity and Protected Areas Management

CBT – Community-based Tourism

CHICOP – Chumbe Island Coral Park

CITES – Convention on International Trade in Endangered Species of Wild Fauna and Flora

CMAS – *Confédération Mondiale des Activités Subaquatiques*

COGES – *Comité de Gestión*

DERC – Dolphin Encounters Research Centre

EAC – East African Community

EEZ – Exclusive Economic Zone

EU – European Union

FDI – Foreign Direct Investment

FEE – Foundation for Environmental Education

GDP – Gross Domestic Product

GEF – Global Environment Facility

HCI – Holiday Climate Index

IBAs – Important Bird Areas

IFRECOR – French Initiative for Coral Reefs

IOTC – Indian Ocean Tuna Commission

IUCN – International Union for Conservation of Nature

IUU – Illegal, Unreported, and Unregulated Fishing

KEMFSED – Kenya Marine Fisheries and Socio-Economic Development

LMMAs – Locally Managed Marine Areas

MBREMP – Mnazi Bay-Ruvuma Estuary Marine Park

MEF – Ministry of Economy and Finance

MGF – Malagasy Francs

MIMAIP – Ministry of the Sea, Inland Waters and Fisheries

MIMPA – Mafia Island Marine National Park

MIMP – Mafia Island Marine Park

MNP – Maputo National Park

MP Plan – Mahé Plateau Trap and Line Fishery Co-management Plan

MPA / MPAs – Marine Protected Area(s)

MPRU – Marine Parks and Reserves Unit

MSDA – Mauritius Scuba Diving Association

MSP – Marine Spatial Planning

NBT – Nature-based Tourism

PADI – Professional Association of Diving Instructors

PCE – Plan Comores Émergent

PPP – Public-Private Partnership

PRATI – The Pate Resources and Tourism Initiative

SCR – Seychellois Rupee

SDRB – Somali Development and Reconstruction Bank

SFA – Seychelles Fishing Authority

SIDS – Small Island Developing States

SMEs – Small and Medium-sized Enterprises

SNPA – Seychelles National Parks Authority

SPGA – Seychelles Parks and Gardens Authority

Ste Anne MNP – Sainte Anne Marine National Park

TACMP – Tanga Coelacanth Marine Park

TZS – Tanzanian Shillings

UNDP – United Nations Development Programme

UNECA – United Nations Economic Commission for Africa

UNEP-WCMC – United Nations Environmental Programme - World Conservation and Monitoring Centre

UNESCO – United Nations Educational, Scientific and Cultural Organization

USD – United States Dollar

WCA – World Cetacean Alliance

WESSA – Wildlife and Environment Society of South Africa

WIO – Western Indian Ocean

WTTC – World Travel & Tourism Council

WWF – World Wide Fund for Nature

WWF-BAF – WWF's Blue Action Fund

ZAR – South African Rand

1

Overview of the report

Tourism contributes significantly to the Blue Economy, yet it is understudied and rarely appears in biodiversity or blue economy conversations especially in the Western Indian (WIO) Region. **The current model of coastal and marine tourism is inherently unsustainable, characterised by high levels of economic leakage, seasonality and vulnerability to natural and economic shocks.** What is needed is good science to inform policies and investments in nature-based tourism for the Blue Economy. It was, however, found during the research conducted in the development of this report that reliable, robust, consistent data specifically on coastal and marine nature-based tourism (NBT) was not available, other than from a few site-level examples. There was no data focused specifically on coastal and marine NBT found to be collected at a national level within the WIO region. Even data on the broader sector of coastal and marine tourism was difficult to find and the data that was available was often outdated, incomparable over time and/or between countries. In order to support data-driven policy and practice and to allow for data-driven decision making with respect to coastal and marine nature-based tourism in the Western Indian Ocean region, it is essential that systems are put in place to collect comparable, robust data over time.

This report starts with an introductory section providing context for the remainder of the report, including looking at an overview of the blue/ocean economy, biodiversity as the resource asset base for NBT in the region and the relevant policy and regulatory environment in the Western Indian Ocean (WIO) region. Case studies on ten WIO countries are then presented, looking at the coastal and marine NBT activities available and, where possible, socio-economic values related to them. Opportunities and challenges related specifically to coastal and marine NBT in the WIO region are then presented, followed by a roadmap to unlock coastal and marine NBT in the WIO region. Information from a recent report by Kepher-Gona et al. (2024) titled *"Sustainable Blue Tourism in the Western Indian Ocean: Trends, Challenges and Policy Pathways"* which looks at broader blue tourism, not only coastal and marine NBT, is referenced in this report. In order not to repeat large sections of that report only some elements have been incorporated in this report and we recommend that it is read in conjunction with this report to provide a full overview.

1.1 Methodology

An **extensive literature review** was conducted to assess and analyse what information/data is publicly available (secondary research).

Stakeholder engagement: Relevant stakeholders, including, but not limited to, those who attended the WIOMSA WIO regional workshop in Zanzibar, were contacted to seek support in addressing any identified data/information gaps (primary research), writing Text boxes (where relevant), as well as to connect the research team to other relevant stakeholders who could provide information and data.

The **report was reviewed by relevant experts** working in NBT in the WIO region before publication, including at a case study level, as well as the full report.

A **virtual webinar** will be held, in partnership with WIOMSA, to raise awareness of NBT in the WIO region, to present the final report and discuss ways to collect consistent, comparable data going forward.

For the **Mafia Island case study**, a site visit was conducted in November 2025, interviewing relevant stakeholders and visiting NBT sites in order to assess NBT potential and opportunities available.

1.2 Limitations and caveats

The majority of the research for this report was desktop and utilised secondary data. In some cases, stakeholders were contacted directly and primary data/information was received from them. Overall, at a case study as well as a regional level, there was **very little socio-economic data found** specifically related to coastal and marine nature-based tourism (NBT). In most cases, data is collected for travel and tourism in general and in some cases data is disaggregated and/or collected for all coastal and marine tourism, but in very few cases, is it further disaggregated to focus on NBT.

This gap in data has an impact in terms of being able to fully understand the socio-economic value of coastal and marine NBT and its importance to local, national and regional economies. It is important going forward that this data is collected consistently and in a way that is comparable between countries in the Western Indian Ocean region in order to provide data for informed decision- and policy-making.

2

Introduction

2.1 Context and background

Oceans and seas cover over two-thirds of the Earth's surface: contributing to poverty eradication through the creation of sustainable livelihoods and decent work, providing food and minerals, generating oxygen, absorbing greenhouse gases and mitigating the impacts of climate change, determining weather patterns and temperatures, and serving as highways for seaborne international trade (World Bank and United Nations Department of Economic and Social Affairs, 2017).

The **importance of oceans for sustainable development** is widely recognised by the international community and is included in a number of agreements, amongst others (World Bank and United Nations Department of Economic and Social Affairs, 2017):

- Agenda 21,
- The Johannesburg Plan of Implementation,
- Various decisions taken by the Commission on Sustainable Development, the Rio+20 outcome document The Future We Want,
- The 2030 Agenda for Sustainable Development,
- The 1982 United Nations Convention on the Law of the Sea (UNCLOS), together with its implementing agreements—the 1994 Agreement relating to the implementation of Part XI of UNCLOS and the 1995 United Nations Fish Stocks Agreement—sets out the legal framework within which all activities in the oceans and seas must be carried out and is of strategic importance as the basis for national, regional, and global action and cooperation in the marine sector. This includes the conservation and sustainable use of all areas of the oceans and their resources.

Coastal and marine tourism as a whole contributes both directly and indirectly to a number of Sustainable Development Goals (SDGs) - see Figure 1. Although this analysis by the Ocean Panel (2022) is not focused on nature-based tourism, the contributions apply there as well, with a greater emphasis on SDG 12, 14 and 15.

Figure1. Contribution of sustainable coastal and marine tourism to the SDGs



Source: OceanPanel (2020)

SDG Target 14.7 of the U.N. Sustainable Development Goals focuses on enhancing the economic benefits to Small Island Developing States (SIDS) and Least Developed Countries (LDCs) from the sustainable use of marine resources, including through the sustainable management of fisheries, aquaculture, and tourism. See Table 1 for detail related to Target 14.

The concept of a blue economy came out of the 2012 Rio+20 Conference and emphasises conservation and sustainable management, based on the premise that healthy ocean ecosystems are more productive and form a vital basis for sustainable ocean-based economies (UN DESA 2014a). The next section looks at the blue economy concept in more detail.

Table 1: Tourism's contribution to SDG Target 14

Blue economy activity/sector	Relevant SDG 14 Target (in addition to 14.7)	Rationale
Coastal and marine tourism	Target 14.1	Sustainable tourism can support reducing marine pollution both from land-based and ship-based sources
	Target 14.2	Sustainable tourism can help build ecosystem and human resilience
	Target 14.5 <i>By 2020, conserve at least 10% of coastal and marine areas, consistent with national and international law and based on the best available scientific information</i>	Sustainable tourism can provide financing for marine protected areas, as well as coastal habitat protection and restoration

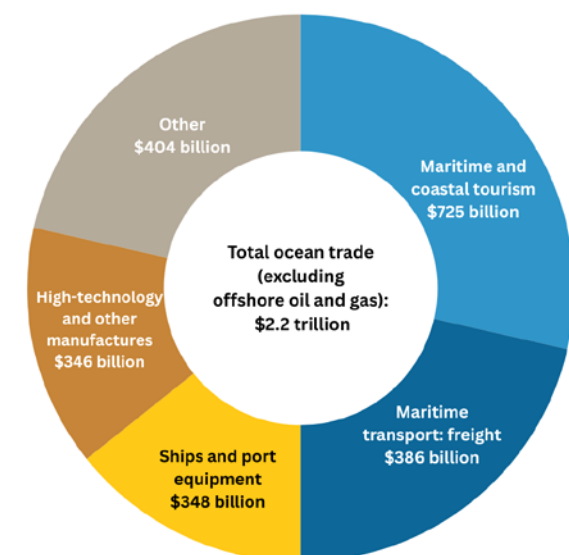
Source: World Bank and United Nations Department of Economic and Social Affairs (2017)

2.1.1 Overview of the blue/ocean economy

The ocean covers 71% of Earth's surface, comprises 90% of the biosphere, provides food security for over three billion people, enables the transportation of over 80% of global goods, and hosts sea cables carrying 98% of international Internet traffic (OECD, 2025). New OECD statistics and analysis reveal the vital role that the ocean plays in the economies and livelihoods of hundreds of millions of people (OECD, 2025). Figure 2 shows that the global trade in ocean goods and services totalled USD 2.2 trillion in 2023, with coastal and marine tourism contributing the largest amount (USD 725 billion) (UNCTAD, 2025). These industries are however under threat from pollution, over-fishing and climate change, with 37.7% of global fish stocks being overfished, up from 10% in 1974 (UNCTAD, 2025).

According to the World Bank and United Nations Department of Economic and Social Affairs (2017) the blue economy comprises the range of economic sectors and related policies that together determine whether the use of oceanic resources is sustainable. The **blue economy includes** established traditional ocean industries such as fisheries, tourism, and maritime transport, but also new and emerging activities, such as offshore renewable energy, aquaculture, seabed extractive activities, and marine biotechnology and bioprospecting (World Bank and United Nations Department of Economic and Social Affairs, 2017).

Figure 2. World ocean goods and services (USD), 2023



Source: UN Trade and Development (UNCTAD), UNCTADstat
 Note: MARINE R&D refers to marine research and development. See UNCTADstat for full description.
 Other includes: Marine fisheries and aquaculture (\$114 billion), Port Services (\$104 billion), Maritime transport: passengers (\$91 billion), Seafood processing (\$89 billion), Marine R&D (\$4 billion), Sea minerals (\$2 billion)

Source: Kepher-Gona et al., 2024

According to Pickens (2023), the term 'blue economy' is interchangeable with 'ocean economy', though some sources define the ocean economy as the utilisation of all the oceans resources for economic gain, with the blue economy being a subset of this which focuses on sustainable practices which balance economic growth with environmental sustainability. There was a large amount of overlap found between the two terms during the research process. In this report we will use the term blue economy. See Figure 3 for an overview of the various sectors within the blue economy.

The focus of this report is on coastal and marine tourism, also known as blue tourism, within the blue economy and specifically on coastal and marine nature-based tourism (NBT), where activities are directly nature-based and nature-dependent. See Text box 2 for information on the Blue Tourism Initiative and its sustainable and inclusive blue tourism pilot projects in the WIO region. Freshwater tourism is also part of the blue economy, but not included in this report. NBT falls within the broader category of ecotourism - see Text box 1 for the UNWTO's definition of ecotourism.

Pickens (2023) highlights though that there is lack of consensus about what the blue economy is and how, and to what extent, it will reshape our understanding and economic practices in the future and this lack of clarity impacts tourism and the implications of a more comprehensive framework for guiding and governing the use of oceanic resources upon the tourism industry and tourist demand.

According to Kepher-Gona et al. (2024) blue tourism, taking place in coastal and marine areas, plays an important role in driving a more sustainable blue economy and coastal and marine tourism constitutes the largest economic sector for most Small Island Developing States (SIDS) and many other coastal states. **Globally, coastal tourism accounts for 5% of GDP and about 7% of employment** (WTTC, 2019). **Projections estimate that by 2030, global coastal and marine tourism will represent the**

Figure 3. Blue Economy sector



Source: Kepher-Gona et al., 2024

largest ocean economy sector, employing approximately 8.5 million people (Brumbaugh & Patil, 2017). In Africa, the World Bank (2022) found that blue tourism contributed USD 80 billion representing 3.4% of GDP and 24 million jobs in 2018. The World Bank (2022) estimates that by 2030, blue tourism in Africa will generate USD 100 billion of the USD 405 billion expected by the global blue economy, and Kepher-Gona et al. (2024) suggest that there is a **large economic potential for blue tourism to drive Africa's future economic growth**, if aligned to sustainability.

If considered a country, the blue economy would be the world's fifth-largest economy in 2019 and from 1995 to 2020, it contributed 3% to 4% of global gross value added (GVA) and employed up to 133 million full-time equivalents (FTEs) (OECD, 2025). At a global level, tourism and offshore oil and gas extraction generated about two thirds of the total gross value of the blue economy, with **coastal and marine tourism being the largest employer**, while offshore oil and gas extraction created high economic output, but relatively low employment (OECD, 2025). In annual terms, coastal and marine tourism was the largest blue economic activity group in global real terms GVA between 1995 and 2019 when it hit a peak of USD 1.06 trillion (OECD, 2025).

According to the OECD (2025) there are **four key strategic priorities to achieve a productive and sustainable blue economy**:

1. Strengthen ocean governance and regulatory frameworks;
2. Promote technological innovation and digital transformation;
3. Enhance ocean observation data collection and scientific research; and
4. Expand developing countries' participation in the ocean economy while safeguarding against environmental harms.

These strategic priorities are also key to developing a productive and sustainable coastal and marine NBT industry.

Challenges facing the broader blue economy include, amongst others (World Bank and United Nations Department of Economic and Social Affairs, 2017):

- Unsustainable extraction of marine resources, such as unsustainable fishing,
- Physical alterations and destruction of coastal and marine habitats and landscapes due to coastal development, mining and deforestation,
- Marine pollution, and
- Impacts of climate change.

Challenges related to coastal and marine tourism in general are discussed in more detail at the end of the introduction and then more specifically for coastal and marine NBT in the WIO at the end of the report, as well as in each of the country case studies for that country in particular.

In terms of stakeholders engaged in blue tourism: for more information on the different stakeholder groups involved in blue tourism as well as international and regional governance frameworks related to blue tourism and, therefore, also relevant to coastal and marine NBT, see Kepher-Gona et al. (2024, pp 20-28). In the WIO region, The Indian Ocean Rim Association (IORA), the Nairobi Convention, WIOMSA and CORDIO, amongst others, are key organisations and programmes.

Text box 1: UNWTO's definition of ecotourism

Source: UNWTO, 2002

According to the UN Tourism's definition, ecotourism refers to forms of tourism which have the following characteristics:

1. All nature-based forms of tourism in which the main motivation of the tourists is the observation and appreciation of nature as well as the traditional cultures prevailing in natural areas.
2. It contains educational and interpretation features.
3. It is generally, but not exclusively organised by specialised tour operators for small groups. Service provider partners at the destinations tend to be small, locally owned businesses.
4. It minimises negative impacts upon the natural and socio-cultural environment.
5. It supports the maintenance of natural areas which are used as ecotourism attractions by:
 - Generating economic benefits for host communities, organisations and authorities managing natural areas with conservation purposes;
 - Providing alternative employment and income opportunities for local communities;
 - Increasing awareness towards the conservation of natural and cultural assets, both among locals and tourists.

Nature-based tourism (NBT), therefore, falls within the broader category of ecotourism, though not all of the above characteristics necessarily apply to all NBT.

Text box 2: Blue Tourism Initiative: sustainable blue tourism in the WIO region

Source: Blue Tourism Initiative, 2025; Kepher-Gona et al, 2024

The Blue Tourism Initiative launched its sustainable and inclusive blue tourism pilot projects in the WIO region. This project aligns with the policy actions recommended for sustainable blue tourism in 2024 by Kepher-Gona et al. These actions include:

- strengthening inclusive blue tourism value chains;
- supporting mechanisms to foster local community benefits;
- incentivising access to certification and standards; and
- strengthening local coastal and marine governance institutions.

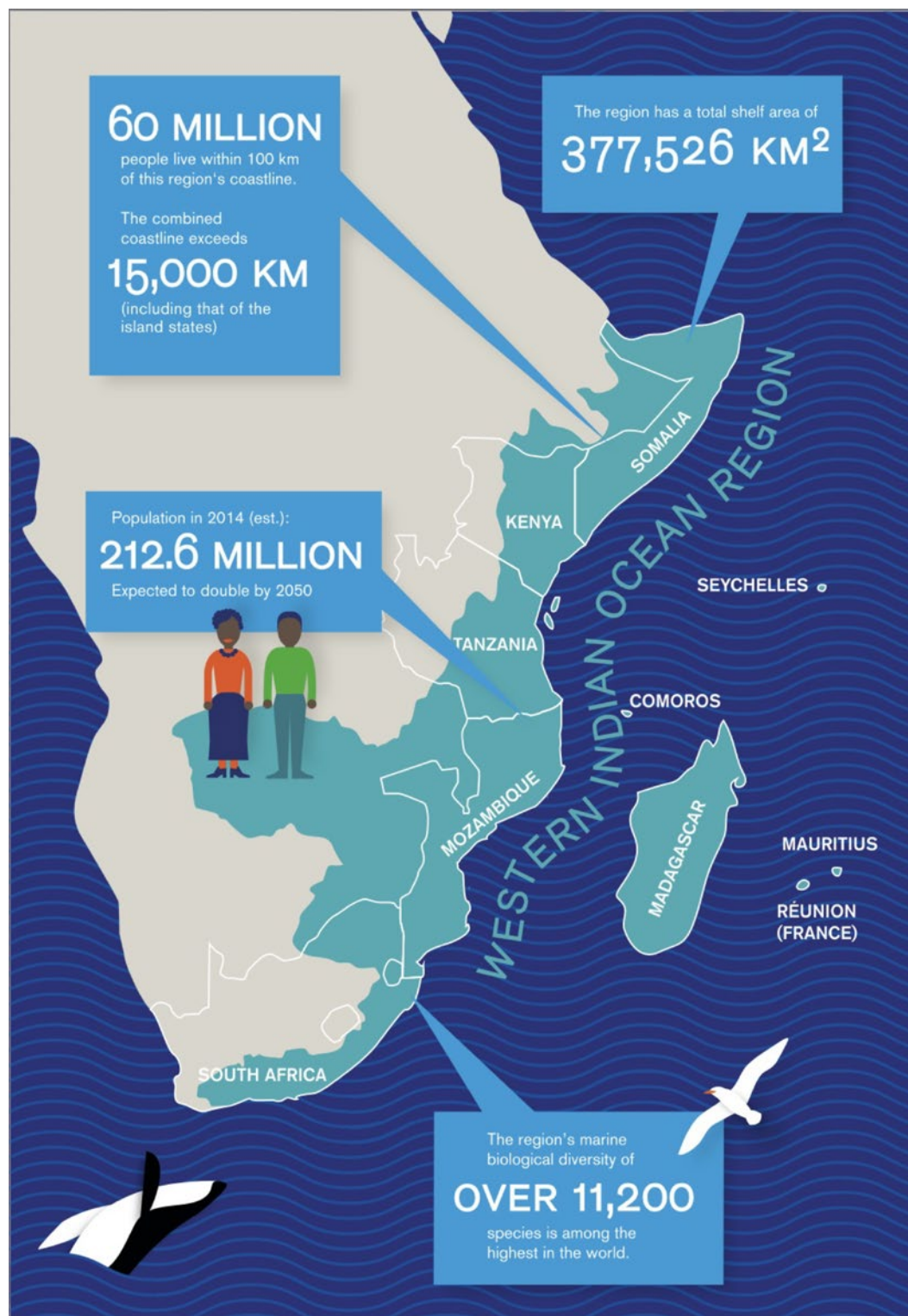
The project is led by CORDIO East Africa in close collaboration with local implementing partners in Kenya, Madagascar and Comoros. The pilot project is implemented in three sites: Mitsamioulli-Ndroudé National Park in Comoros, Diani-Shimoni Seascape in Kenya and Sainte Marie Island in Madagascar. Across these sites, the project supports the participatory development, implementation and monitoring of community-driven blue tourism initiatives that balance livelihood development with coastal and marine conservation, using policy actions and a multi-stakeholder approach to guide sustainable tourism planning that delivers social, economic and environmental benefits at the local level.

On the Sainte Marie Island in Madagascar, the project is carried out in collaboration with the tourism office (OTSM) to advance its objective of strengthening sustainable practices within the existing tourism sector. Central to this effort is the: i) promotion of effective public-private cooperation and improved information sharing among local stakeholders to ensure coordinated management of the island's tourism resources, and ii) the development of a sustainable island tourism certification (the Saint Marie Eco-Label) for hotels, restaurants and pirogues. The eco-label is envisioned as a practical tool that will guide tourism operators toward environmentally sound, socially inclusive, and high-quality service standards. A key driver for the label is addressing acute local challenges, including limitations in infrastructure, borehole-dependent water systems, and persistent issues related to plastic waste management. In Comoros, the Initiative works through the Mitsamioulli-Ndroudé National Park (MNPN) to develop a sustainable blue tourism experience model that promotes inclusion, environmental sustainability, and marine conservation. A core activity is the participatory development of a Sustainable Tourism Destination Management Plan (DMP) to be approved and endorsed by both local and national authorities. In Diani-Shimoni, Kenya, efforts aim to respond to environmental and socio-economic issues by strengthening local capacities, improving market linkages and supporting governance mechanisms that advance a community-based tourism model. These kinds of pilot projects are important because they provide a practical starting point for testing community-led models of sustainable blue tourism in diverse contexts across the WIO region. By demonstrating how community empowerment, sustainable management, and market development can work together, the pilots create a strong foundation for scaling up. Lessons that will emerge from these sites can help guide future policy actions and lead to expanding similar efforts to other WIOMSA member states which will support and advance sustainable blue tourism that supports livelihoods while conserving marine biodiversity. For more information on the project see <https://bluetourisminitiative.org/>.

2.1.2 Natural resources and biodiversity in the Western Indian Ocean (WIO) region

The Western Indian Ocean (WIO) region covers an ocean area estimated at 25 million km², of which about 6.4 million km² are recognised as Ecologically or Biologically Significant Areas (EBSAs) (Fennessy, 2025). It encompasses diverse tropical and subtropical marine environments along the coasts of Somalia, Kenya, Tanzania, Mozambique and South Africa, as well as the island states of Madagascar, Seychelles, Comoros, Mauritius and Réunion (Chevallier, 2017). The region's distinctive geomorphological and oceanographic features create conditions that support exceptionally high biodiversity, both in species and ecosystem variety (Paula, 2015). This has led **the WIO region to be considered one of the world's most important ocean regions for biodiversity** (Samoilys et al., 2015). Figure 4 provides an overview of some key data related to the WIO region and the following sections give an overview of the natural resource asset base of the WIO region.

Figure 4: Overview of key WIO region socio-economic and environmental information



Source: UNEP, 2018

2.1.3 Coastal and marine habitats

The WIO region has a diverse range of coastal and marine habitats, including mangroves, seagrass meadows, coral reefs, rocky shores, sandy beaches and salt marshes. These habitats are highly productive and interconnected, forming the ecological foundation for marine life and for millions of people who depend on them. The WIO region has the following habitats:

- **Mangroves** cover approx. 6,200 km² in the region, representing roughly a quarter of Africa's total mangrove area and 4.1% of global mangroves (Beentje & Bandeira, 2008; Fatoyinbo & Simard, 2013; Spalding et al., 2010). The largest areas are found in Mozambique, followed by Madagascar, Tanzania, Kenya, the Seychelles, and South Africa. **Mangroves in the WIO are among the most diverse globally, with nine species recorded in the region** (Bosire et al., 2016). The most common mangrove species found in the region include Grey or White Mangrove (*Avicennia marina*), Black Mangrove (*Bruguiera gymnorhiza*), and Red Mangrove (*Rhizophora mucronata*) (Ibid.). **Mangroves protect coastlines from erosion, provide nursery areas for fish and invertebrates, and supply essential materials such as timber, food and tannins to local communities** (Taylor et al., 2003). However, they are increasingly threatened by overharvesting, conversion to agriculture and aquaculture, pollution, and the effects of sea-level rise and sedimentation linked to climate change (Lugendo, 2015).
- **Seagrass beds** are distributed throughout the WIO, from northern Somalia to southern South Africa and across the island states (ASCLME, 2012). In the WIO, **fourteen seagrass species across three families have been recorded**, including Sickle-leaved Cymodocea (*Thalassodendron ciliatum*), Sickle seagrass/Turtle grass (*Thalassia hemprichii*) and Serrated ribbon seagrass (*Cymodocea serrulata*) (Lugendo, 2025). These habitats **provide nurseries and feeding areas for a diverse range of fish, invertebrates and threatened megafauna** such as sea turtles (*Chelonia mydas*) and dugongs (*Dugong dugon*) (Spalding et al., 2003; Lugendo, 2025). Seagrasses are particularly sensitive to sedimentation, nutrient pollution, destructive fishing and coastal development.
- **Coral reefs** in the region cover approx. 11,980 km², about 35% of the coastal habitats of East African mainland states, where most of the population resides (Whittingham et al., 2003). The reefs include fringing, patch, barrier and atoll types (Andréfouët et al., 2006). They support various reef species, comprising approximately 4,000 species of reef fish, 670 species of soft coral, and 700 species of hard coral (Veron, 1995; Lieske & Myers, 1994). **Reefs underpin major fisheries, protect shorelines and sustain coastal tourism**, yet face intense pressure from coral bleaching, overfishing, pollution and sedimentation (Muthiga et al., 2025).
- **Rocky shores and sandy beaches** are common along the WIO coastline. These habitats host diverse assemblages of benthic invertebrates, including molluscs, crustaceans, cnidarians (e.g. jelly fish, corals, sea anemones) and echinoderms (e.g. star fish, sea urchins) (Postaire et al., 2014; Maina, 2015). Sandy beaches provide nesting grounds for sea turtles, notably the Green sea turtle (*Chelonia mydas*) and the Hawksbill turtle (*Eretmochelys imbricata*) (Marquez, 1990). According to Nordlund et al. (2014), rocky shores and sandy beaches also **support coastal and marine NBT**, although they are vulnerable to coastal development, mining and pollution.
- **Salt marshes** are mainly found along the South African coast, covering approx. 12,344 ha nationally, with about 20% located in the WIO's subtropical zone (Lugendo, 2015). Adams & Bandeira (2025) highlighted that salt marshes play **an important role in hosting wading birds and migratory species** that feed on crustaceans and small fish (Adams & Bandeira, 2025). However, habitat loss has been significant in the region, with approx. 6,000 ha lost to development and hydrological alteration (Adams, 2020).

2.1.4. Biodiversity

The WIO **supports between 11,000 and 20,000 marine species** (Richmond, 2015). It is a **recognised hotspot for fish, invertebrates, marine mammals, reptiles and seabirds**. Approximately 3,600 bony fish species are known, 37 of which are listed as threatened (Heemstra & Heemstra, 2019). The region also hosts 227 species of sharks, rays and chimaeras (ghost sharks or rat fish), 40% of which are considered threatened under the IUCN Red List (Dulvy et al., 2021). Endemism is particularly high around Madagascar, where species such as the Madagascar pygmy skate (*Fenestraja maceachrani*) and Madagascar numbfish (*Narcine insolita*) occur only locally (Last et al., 2016).

In total, 238 marine species in the WIO are listed as threatened on the IUCN Red List (Muthiga et al., 2025). This includes corals, fish, invertebrates, turtles, and mammals. For instance, there are 357 sea cucumber species in the region, with 10 classified as threatened, including four as Endangered and six as Vulnerable (Muthiga & Conand, 2014). Approximately 2,500 gastropod species are described, with two cone shell species listed as threatened (Richmond & Rabesandratana, 2011). Five of the world's seven sea turtle species are found in the region, including Olive Ridley (*Lepidochelys olivacea*), Green (*Chelonia mydas*), Hawksbill (*Eretmochelys imbricata*), Leatherback (*Dermochelys coriacea*) and Loggerhead (*Caretta caretta*), all of which are threatened, with the Hawksbill and Leatherback critically endangered (Bourjea, 2015). Braulik et al. (2015) stated that approx. 37 marine mammal species are found in the WIO, six of which are listed as threatened, including the Blue whale (*Balaenoptera musculus*), Sei whale (*Balaenoptera borealis*) and Indian Ocean humpback dolphin (*Sousa plumbea*).

2.1.5 Ecological and socio-economic importance, threats and pressures

The **ecological and socio-economic importance of WIO ecosystems is substantial**. Mangroves, seagrasses and coral reefs are key natural barriers that protect coastlines from erosion and storm surges, while also providing breeding and feeding grounds that sustain fisheries and food security (Bosire et al., 2016). Sandy beaches and coral reefs form the foundation of the coastal and marine NBT industry in the region, which provides income and employment for millions of people (Muthiga et al., 2025). In rural coastal areas, natural resources such as mangrove timber, shellfish and nearshore fisheries directly support livelihoods and cultural traditions.

Despite these ecosystem services, **environmental pressures across the WIO are intensifying**. Paula (2025) highlighted that natural disturbances, such as cyclones, floods, and tsunamis, cause episodic damage, but human-driven threats are more persistent. Anthropogenically driven threats include overexploitation of fish and invertebrates, coastal and marine ecosystem destruction due to land reclamation, urbanisation, dredging, mining and oil and gas extraction, as well as diffuse and point-source pollution (Nairobi Convention & WIOMSA, 2025). It was also reported that climate change exacerbates these pressures through ocean warming, acidification and sea-level rise (Ibid.). Several habitats in the region remain poorly studied and weakly managed, especially rocky shores, where monitoring and protection are still limited (Maina, 2015). These ongoing pressures continue to harm the ecological health and productivity of coastal marine systems in the WIO region, threatening both biodiversity and the livelihoods of local communities.

Several regional and national initiatives have been taken to address these threats in the WIO region. For instance, the creation of Marine Protected Areas and Locally Managed Marine Areas is one strategy to enhance the conservation of coastal and marine habitats and biodiversity (Nairobi Convention & WIOMSA, 2025). Additionally, other initiatives include the UNEP-Nairobi Convention protocols and community-based restoration projects, which aim to strengthen ecosystem management and improve the resilience of coastal habitats (Ibid.). Despite existing efforts to address these threats, WIO countries and islands need to strengthen regional cooperation, improve habitat monitoring, integrate conservation with coastal development policies and effectively implement existing policies to protect coastal and marine habitats and biodiversity in the region. These are essential steps to ensure the long-term sustainability of the Western Indian Ocean's natural resources and biodiversity, which form the base for coastal and marine nature-based tourism.

2.2 Policy and regulatory environment

In order to ensure successful, sustainable coastal and marine nature-based tourism (NBT) in the Western Indian Ocean (WIO) region, a supportive policy and regulatory framework is essential in creating the required enabling environment for all stakeholders to engage and benefit from it. This is mostly required at a national level but in order to scale, is also important at a regional level, with support from global policy and regulation.

The majority of the policies and other legislation in the region focus on travel and tourism in general, with little focus specifically on NBT and even less specifically on coastal and marine NBT, resulting in this form of tourism often being neglected in reporting processes and little to no data being collected specifically on it. This results in little understanding of the value of the sector (see section 3.4) and an inability to accurately account for it in policy- and decision-making.

Appendix A gives a non-exhaustive overview of the regulatory environment related to coastal and marine NBT in the WIO region.

2.2.1 Policy analysis for the region

This section provides a broad analysis of the regulatory framework related to the blue economy and, where available, coastal and marine nature-based tourism in the WIO region, highlighting strengths and gaps.

Common strengths across the WIO region:

- There is a strong momentum around the Blue Economy agenda in most countries, as well as at an African Union level.
- There is increasing interest in, and use of, Marine Protected Areas (MPAs) to provide protection for the natural resource asset bases.
- There is increasing interest in, and establishment of, community co-management agreements, which provide the opportunity for more equitable benefit-sharing from coastal and marine NBT.
- There are regional alignments, collaboration and partnerships through various Western Indian Ocean Initiatives. For example the Great Blue Wall Initiative.

Gaps in policy and governance:

- Many policies are strategic rather than operational and, therefore, there are limited and diverse levels of implementation.
- There are a number of cases where there are missing monitoring, enforcement, and financing mechanisms that limit effective and sustainable implementation.
- There is often fragmentation and poor policy integration with a disconnect between marine conservation, fisheries, tourism and national development planning, amongst others.
- Lack of appropriate planning for coastal areas
- There are multiple cases where there is outdated legislation and/or policies, as well as overlapping mandates or conflicting policies.

At a country level, the next section highlights examples of a non-exhaustive list of good policies and gaps in policy and governance:



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Comoros

Positive policy examples:

- Moroni Declaration on the Blue Economy (2023) – a clear political commitment aligning national development with ocean sustainability.
- Moheli Marine Park/ National Park – this long-standing community co-management model is well-documented and often cited as an example of best practice within the region.
- Great Blue Wall Initiative – offers an example of strong regional integration and alignment with conservation and livelihoods.

Gaps:

- Several initiatives, such as the national MPA network, are planned or proposed, indicating an implementation gap.
- There is limited evidence that there is enforcement capacity or sustainable financing at a national scale.

Kenya

Positive policy examples:

- The National Blue Economy framework shows a strong integration with national development goals.
- The National Tourism Blueprint 2030 and the Kenya Coast Tourism and Cultural Heritage Blueprint 2030 aim to address some of the challenges facing coastal and marine NBT in the country.

Gaps:

- Policies inadequately address coral reef degradation, pollution, overfishing, unregulated development and climate change.
- Policies are largely strategy-level, with less emphasis on local-level implementation and enforcement.
- There is limited focus on community inclusion with policies failing to promote inclusive community-based ecotourism.
- Policies overlook skills gap and infrastructure and equipment shortages.
- Weak integration of biodiversity conservation with tourism.

Madagascar

Positive policy examples:

- Community-based marine conservation and locally managed marine areas (LMMAs) feature prominently.
- Strong alignment between biodiversity conservation and livelihoods in policy framing.

Gaps:

- There is a heavy reliance on project-based or donor-driven mechanisms, with limited evidence of long-term institutionalisation.
- National-level coordination across sectors remains weak in policies.
- Outdated strategies, weak enforcement and insufficient integration of tourism and environmental protection need to be addressed.

Mauritius

Positive policy examples:

- The National Tourism Plan 2025-2029 promotes coastal zoning and MPAs, as well as stricter rules related to development.
- Increased budget allocations for habitat restoration, beach erosion prevention, etc. support resilience.

Gaps:

- Policies inadequately address coral reef degradation, pollution, beach erosion, unregulated development and climate change.
- Coordination gaps between tourism, fisheries, environment, etc. result in inefficiencies.

Mozambique

Positive policy examples:

- Blue Economy Strategies are explicitly linked to national development and poverty reduction.
- Marine spatial planning appears as an emerging strength.

Gaps:

- Fisheries management and conservation policies are not always well integrated.
- There is weak enforcement and a lack of human resources and funding for MPAs.

Réunion

Positive policy examples:

- Strong and well-resourced environmental and marine management frameworks.
- High alignment with international and regional conventions.

Gaps:

- Policies are less focused on community-based governance, reflecting a more top-down management model.
- Transferability of approaches to neighbouring WIO states may be limited.

Seychelles

Positive policy examples:

- Seychelles' Blue Economy Strategic Policy Framework and Roadmap is one of the strongest policy examples that integrates ocean-based sustainable development.
- There are clear links between conservation, fisheries, finance, and climate resilience.
- Innovative approaches to ocean finance and debt-for-nature mechanisms.

Gaps:

- There are a few structural gaps noted in the listed policies; challenges are more about scaling and long-term sustainability.

Somalia

Positive policy examples:

- Emerging frameworks signal growing attention to fisheries governance, tourism and marine resources.

Gaps:

- Significant capacity gaps compared to other countries.
- Limited institutional maturity, enforcement capacity, and national coordination.
- Many frameworks remain fragmented.

South Africa

Positive policy examples:

- Operation Phakisa (Oceans Economy), a well-known, structured approach that links ocean sectors to economic growth.
- The Coastal and Marine Tourism Implementation Plan (CMTIP) aims to boost coastal tourism in underdeveloped areas, which supports local jobs and infrastructure.
- The National Coastal Management Programme (NCMP) 2025-2030 supports MPAs, holistic coastal governance and equitable access.
- There is a strong scientific and technical underpinning of coastal and marine policy.

Gaps:

- Inefficient and fragmented governance, with poor coordination between national, provincial and local levels.
- Community-level coastal governance and public participation mechanisms are not always clear.
- The Blue Flag programme is losing a number of sites as a result of reduced water quality, which requires the enforcement of related policies.
- Environmental and social safeguards sometimes appear secondary to economic objectives.

Tanzania

Positive policy examples:

- The 2024 National Blue Economy Policy provides a cross-sectoral example for sustainable marine resource use.
- Zanzibar's 2020 Blue Economy Policy prioritises tourism emphasising sustainable practices.
- Co-management through Beach Management Units (BMUs), Village Land Councils (VLCs), and Locally Managed Marine Areas (LMMAs) empowers communities in monitoring and sustainable tourism practice.
- Mafia Island Marine Park – a long-standing example of area-based management with conservation tourism objectives that demonstrates the practice of MPAs in local development.

Gaps:

- Significant implementation and structural gaps hinder sustainable growth, including a lack of collaboration between the mainland and the islands (e.g. Pemba, Uguja, Mafia, etc.).
- Policies suffer from weak enforcement due to limited technical capacity, poor infrastructure and political interference.
- Overlapping mandates and fragmented oversight, for example MPAs fall under fisheries, not tourism which impacts on the management of tourism in these areas.
- No formal Marine Spatial Plan and existing frameworks (e.g. Tourism Act of 2008) lack provisions for zoning or conflict resolution between tourism and fisheries.
- Scaling successful island-level models to the mainland remains a challenge.

2.3 Wildlife Economy Investment Index (WEII)

Source: Taken from Snyman & Tshitwamulomoni (2025), pp 5-6

The African Leadership University's School of Wildlife Conservation (ALU SOWC) developed the Wildlife Economy Investment Index (WEII) over a two-year period, launching the first results in October 2023. The development of the WEII was based on the research, stakeholder engagement and findings in the State of the Wildlife Economy in Africa (Snyman et al., 2021b) and the Roadmap for Africa's Wildlife Economy reports (Snyman et al., 2021a) and the need for a tool to support and encourage investment in the wildlife economy so that conservation is seen as a key growth industry, increasing investments in wildlife resources and the related businesses. The aim was also that, through the WEII and the results of individual indicators, governments would see wildlife as a key strategic asset and critical growth opportunity for their economies and begin to create better enabling environments, through improving and streamlining policy, amongst other things. Another key overall ambition of the WEII is to encourage more public and private investments in natural landscapes to improve conservation outcomes and support economic development.

The WEII is a measure of investment potential in Africa's wildlife economy, with the 'big five' investment opportunities focused on being: ecotourism, the carbon market, hunting (including some aspects of fishing), wildlife ranching, and forest products (which largely include non-timber forest products and some elements of sustainable indigenous timber). Taken together, they constitute a market share of over USD 250 billion a year in Africa (see Snyman et al., 2021a, 2021b for more details on Africa's wildlife economy).

The ALU SOWC defines the wildlife economy as one which uses wildlife, both plants and animals (marine and terrestrial) as an economic asset to create value that aligns with conservation objectives and delivers sustainable growth and economic development (wildlife includes indigenous, undomesticated terrestrial and marine animals, plants and other life forms) (Snyman et al., 2021b). This definition includes and excludes the same elements as described above for the biodiversity economy.

The WEII, therefore, serves as a comprehensive framework, sustainably utilising indigenous wildlife as an economic asset, aligning with conservation goals, and fostering sustainable growth and development. With two main Sub-Indices, the Wildlife Status Sub-Index looks at a country's wildlife size and status and the management effectiveness of this wildlife, evaluating indicators related to assets, species richness, ecological habitats, and wildlife management effectiveness. And the Investment-enabling Environment Sub-index assesses conditions facilitating investments, considering indicators such as ease of doing business, corruption, infrastructure, and security. The WEII provides a multidimensional analysis, drawing from 280 indicators across 34 datasets. Please find an Executive Summary of the WEII v1 results here.

Table 2 shows the results from the WEII v1 for the WIO countries (Reunion was not included in the WEII). For more detailed information for each country, see the relevant national reports referenced in the table.

Table 2: WIO country Wildlife Economy Investment Index (WEII) scores

Country	Overall WEII score/ ranking in Africa	Investment-enabling Environment Sub-Index score/position in Africa	Wildlife Status Sub-Index score/position in Africa	Source
Comoros	39.26/44th	39.8/44th	38.72/38th	Kant et al., 2024
Kenya	53.68/11th	64.65/13th	42.7/21st	Habumuremyi & Snyman, 2024
Madagascar	51.78/18th	51.12/32nd	52.45/2nd	Mhlanga et al., 2024
Mauritius	58.66/3rd	78.27/1st	39.06/36th	Mpakairi et al., 2024
Mozambique	46.18/31st	47.86/37th	45.77/17th	Mpakairi et al., 2024
Reunion	-	-	-	
Seychelles	62.84/2nd	75.97/2nd	49.71/4th	Kant et al., 2024
Somalia	22.19/53rd	22.09/53rd	22.28/53rd	Kant et al., 2023
South Africa	63.12/1st	71.13/6th	55.11/1st	Kant et al., 2023
Tanzania	55.42/9th	59.56/15th	51.28/3rd	Mhlanga et al., 2024

Within the WIO region, WEII overall country rankings varied from 1st (South Africa) to 53rd (Somalia). Rankings for the Investment-enabling Environment Sub-index also varied from 1st (Mauritius) to 53rd (Somalia) and similarly for the Wildlife Status Sub-index from 1st (South Africa) to 53rd (Somalia), indicating large differences in terms of the overall investment-enabling environment, as well as wildlife status across the region. Such differences will require **supportive and adaptive policy and legislation**, as well as cross-country sharing of experiences and learnings in order to improve rankings.

The WEII v2 will be published in 2026 and will be followed by extensive stakeholder engagement to refine and further develop the WEII as a practical- and policy-relevant tool, as well as potentially linking it to a sovereign debt instrument.

2.4 Conclusion

The WIO countries are richly endowed with natural resources, many of which are unique to the region, which provide opportunities for a diverse range of coastal and marine nature-based tourism activities. Despite its growing importance, coastal and marine NBT remains an under-researched and poorly understood element of the broader blue economy in the region. It is important that more socio-economic and environmental information is collected on the various activities to ensure that they are sustainably managed and effectively and equitably included in policy, practice and decision-making processes at the local, national and regional levels, thereby contributing to long-term conservation outcomes and resilient blue economies in the WIO region.

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3

Coastal and marine nature-based tourism

As discussed in sections one and two, the focus of this report is specifically on coastal and marine nature-based tourism (NBT) within the broader blue economy. It is important, therefore, to start with defining what is meant by coastal and marine NBT and what is included and not included in this report.

3.1 Defining coastal and marine nature-based tourism (NBT)

One of the standard definitions of coastal and marine tourism is the following by Hall (2001: 602):
“The concept of coastal tourism embraces the full range of tourism, leisure, and recreationally oriented activities that take place in the coastal zone and the offshore coastal waters. These include coastal tourism development (accommodation, restaurants, food industry, and second homes), and the infrastructure supporting coastal development (e.g. retail businesses, marinas and activity suppliers). Also included are tourism activities such as recreational boating, coast- and marine-based ecotourism, cruises, swimming, recreational fishing, snorkelling and diving. Marine tourism is closely related to the concept of coastal tourism but also includes ocean-based tourism such as deep-sea fishing and yacht cruising”.

Dwyer (2018) further defines coastal tourism as embracing the full range of tourism, leisure, and recreationally oriented activities that take place in coastal zones and the offshore coastal waters, while marine tourism relates more to sea and ocean based activities more remote from coastlines. He explains that the difference between the two concepts is one of degree since **any divorce between coastal and marine tourism is somewhat artificial with respect to value chain interconnectedness** (Orams, 1999 in Dwyer, 2018).

Some authors and organisations refer to coastal and maritime tourism (CMT) (Kepher-Gona et al., 2024; World Bank, 2017). Kepher-Gona et al. (2024) highlight that CMT is **one of the oldest tourist industry segments** (Honey & Krantz, 2007), which evolved from leisure activities in the 19th century through to the mainstreaming of paid vacations, all-inclusive resorts and as a means of transportation.

These definitions are for the broader aspect of coastal and marine tourism, not necessarily that which is nature-based. This report attempts to focus specifically on the nature-based activities within coastal and marine tourism, i.e. those activities which require healthy coastal and marine ecosystems in order to attract tourists and these healthy ecosystems are the main reason behind why tourists would engage in the activity. Kepher-Gona et al. (2024) **describe nature-based tourism (NBT)** as all forms of tourism that use natural resources in an undeveloped form and are motivated by the enjoyment of wildlife or undeveloped natural areas, which may incorporate natural attractions including scenery, topography, waterways, vegetation, wildlife, and cultural heritage, and activities such as hunting or bird watching along the coastlines of MPAs (see Table 3 for a list of relevant definitions and terms related to nature-based tourism).

Table 3: Definitions of different forms of nature-based tourism

Term	Definition
Nature-based tourism	Forms of tourism that use natural resources in a wild or undeveloped form. Nature-based tourism is travel for the purpose of enjoying undeveloped natural areas.
Ecotourism	Responsible travel to natural areas that conserves the environment socially and economically sustains the well-being of the local people, and creates knowledge and understanding through interpretation and education.
Wildlife tourism	A form of nature-based tourism that includes the consumptive and non-consumptive use of wild animals in natural areas. Wildlife tourism is centred around the observation and interaction with local wildlife (also sometimes called safari tourism)
Geotourism	Tourism that sustains or enhances the distinctive geographical character of a place, including its environmental heritage, aesthetics, culture and the well-being of its residents.

Source: World Bank, 2020 in Kepher-Gona et al., 2024

Nature-based tourism is broadly understood as travel motivated primarily by interaction with the natural environment, underpinned by ecological sustainability, low-impact operations, and contributions to conservation and local communities (Buckley, 2009; Newsome, Moore & Dowling, 2012). In this model, **nature is not merely a backdrop but the central asset around which tourism experiences are structured** (Higham et al., 2008). NBT encompasses activities such as ecotourism, wildlife tourism, and elements of adventure tourism, while excluding mass-market forms that prioritise comfort or spectacle over meaningful engagement with the natural world (Higham & Lück, 2008; Weaver, 2008).

For this reason, the report does not include detailed information on cruise tourism as nature-based tourism activities are not the main activity, but are mostly indirect activities not always included in a cruise itinerary and/or not the primary reason for travel. It is important to note however that **the long-term sustainability of cruise tourism still relies on healthy, sustainable ocean systems**, which should be a focus area of these businesses in terms of sustainability practices on-board and in their operation. See Text box 3 for more information related to cruise tourism and whether or not it is a NBT activity.

Dwyer (2018, p. 29) estimates that **global coastal and marine tourism generated a total Gross Value Added (GVA) in 2010 of USD 390.11 billion and employed 6.9 million people**; by 2030 it is projected to produce a GVA of USD 777.14 billion with an expansion of employment to 8.6 million in total. The projected 3.5% annual growth in coastal and marine tourism to 2030 exceeds projections made by the United World Tourism Organisation (UNWTO) of 3.3 % annual growth for tourism as a whole (Dwyer 2018: 30). The expansion of the coastal and marine tourism sector can potentially catalyse numerous opportunities for small, medium and micro-enterprises (SMMEs) for local entrepreneurs which would enhance the sector's developmental potential and local destination impacts (Attri, 2018; Rogerson, 2020). These local value chains and multipliers can have substantial socio-economic development impacts. Policy and regulation should support the development of these, as well as the required capacity building to ensure greater equity in terms of benefit-sharing from coastal and marine NBT.

Text box 3: Can cruise tourism be considered Nature-Based Tourism (NBT)

This Text box examines whether cruise tourism in the Western Indian Ocean (WIO) can legitimately be considered a form of nature-based tourism (NBT). The central question guiding this investigation is: **To what extent does cruise tourism in the WIO align with the theoretical and operational criteria associated with NBT?** Addressing this requires a comprehensive assessment of the ecological, socio-economic, and governance conditions shaping cruise tourism in the region, the extent to which these correspond with established NBT principles, and the policy or institutional reforms necessary to support a transition toward a sustainable, nature-oriented cruise model. This inquiry contributes to broader debates on the conceptualisation of NBT under intensifying coastal and marine pressures and informs discussions on sustainable cruise tourism within emerging Blue Economy frameworks, providing evidence to guide policy, decisions, and governance approaches that balance economic development with long-term ecosystem health and social equity.

In recent years, the Blue Economy agenda has encouraged the integration of cruise tourism into national development strategies in the region. Kenya, Mauritius, and South Africa have invested in port infrastructure to accommodate the expansion of this sector, which is among the fastest-growing segments of global tourism (Dowling & Weeden, 2017; Carić & Mackelworth, 2014). The economic potential of cruise tourism in the WIO is therefore widely acknowledged, even while questions remain regarding its sustainability and compatibility with NBT principles.

Defining Nature-Based Tourism (NBT)

Nature-based tourism is broadly understood as travel motivated primarily by interaction with the natural environment, underpinned by ecological sustainability, low-impact operations, and contributions to conservation and local communities (Buckley, 2009; Newsome, Moore & Dowling, 2012). In this model, nature is not merely a backdrop but the central asset around which tourism experiences are structured (Higham et al., 2008). NBT encompasses activities such as ecotourism, wildlife tourism, and elements of adventure tourism, while excluding mass-market forms that prioritise comfort or spectacle over meaningful engagement with the natural world (Higham & Lück, 2008; Weaver, 2008).

Based on these conceptual parameters, NBT's emphasis on environmental integrity, local benefit-sharing, and ecological stewardship provides the evaluative criteria against which cruise tourism may be assessed. When interpreted through this lens, mainstream cruise tourism generally fails to meet the foundational characteristics of NBT.

Characteristics of mainstream cruise tourism

The cruise tourism industry has evolved into a highly industrialised and vertically integrated sector (Dowling & Weeden, 2017). Often described using the 'floating city' metaphor, cruise ships are associated with substantial environmental impacts, including air emissions, wastewater discharge, underwater noise, and broader marine ecosystem disturbance (Lloret et al., 2021; Johnson, 2002; Dowling, 2006). These impacts sharply diverge from the low-impact operational standards integral to NBT.

A defining feature of cruise tourism is deterritorialisation—the disembedding of economic and social activities on board the vessel from the immediate geographical context. In this model, the ship itself becomes the primary attraction, while ports serve as secondary or transient spaces (Dowling, 2006; Johnson, 2002). Revenue generation largely occurs onboard through gambling, bars, entertainment, and duty-free shops, creating a "captive consumer" environment (Carić & Mackelworth, 2014). This structure reduces opportunities for meaningful engagement with local communities and limits financial flows into host economies.

In short, mass cruise tourism prioritises high-volume consumption and efficiency over ecological sensitivity, contradicting NBT's foundational principles.

Environmental and socio-economic implications in the WIO

Within the WIO, cruise tourism typically involves brief ‘touchdowns,’ where passengers disembark for limited periods, generating intense yet short-lived pressure on local infrastructure and ecosystems (Carić & Mackelworth, 2014). These short interactions restrict the development of strong linkages to local conservation networks or community-based tourism initiatives (Johnson, 2002; Klein, 2011). Structural revenue leakages—stemming from prepaid packages and offshore supply chains—further diminish the economic value retained in local destinations (Benkenstein, 2018).

Additionally, port infrastructure across much of the WIO remains uneven and often lacks the capacity for effective environmental monitoring, enforcement of conservation levies, or certification of nature-based excursions (Rogerson et al., 2018). These constraints weaken the possibility of aligning mainstream cruise tourism with NBT frameworks.

Emergence of nature-based cruise tourism (NBCT)

Despite these challenges, recent literature highlights a growing interest in Nature-Based Cruise Tourism (NBCT), a subcategory characterised by small-ship expedition cruising, wildlife-centred itineraries, and explicit contributions to conservation (Dowling & Weeden, 2017; Higham & Lück, 2008). NBCT integrates NBT attributes with cruise-based mobility, emphasising:

- low-impact vessel design and operations,
- regulated wildlife viewing and nature interpretation,
- conservation financing mechanisms,
- community integration and benefit-sharing.

This model seeks to minimise ecological footprints and support local socio-economic outcomes. However, empirical evidence suggests that most cruise operators fail to meet the governance, technical, and environmental requirements necessary for genuine nature-based compatibility (Lloret et al., 2021). Furthermore, NBCT depends heavily on robust marine spatial planning, effective MPA governance, and strong civil society oversight—conditions that remain uneven across WIO states (Benkenstein et al., 2018).

Governance diversity and regional variation in the WIO

There is considerable governance asymmetry across the WIO. Seychelles, Réunion, and Mafia Island demonstrate favourable institutional and ecological conditions for NBCT, including well-managed MPAs, stable conservation financing, and meaningful community participation (Mwebaze & MacLeod, 2013; Mathieu et al., 2003). Réunion benefits from EU regulatory frameworks, including advanced wastewater and air-emission controls at Le Port.

By contrast, Mauritius, Kenya, and Zanzibar possess strong policy intentions but lack integrated implementation mechanisms, while Madagascar, Mozambique, Comoros, and South Africa face substantial infrastructure and ecological management constraints. As a result, no WIOMSA member currently satisfies the full suite of NBT criteria due to the absence of formal classification systems, consistent conservation levies, and carbon mitigation measures.

Socio-economic dimensions and value retention

Mainstream cruise tourism in the WIO supports local economies through passenger visits and port fees; however, the sector is characterised by significant structural leakages (Johnson, 2002; Klein, 2011). Weak integration with local procurement networks further reduces the proportion of expenditures retained regionally (Benkenstein et al., 2018).

NBCT, by contrast, requires explicit benefit-sharing strategies that link tourist spending to local conservation outcomes and community livelihoods. Seychelles offers illustrative examples where per-passenger conservation levies and co-managed MPAs create tangible pathways for enhanced economic retention and ecological stewardship (Mathieu et al., 2003; Mwebaze & MacLeod, 2013). As Buckley (2009) argues, aligning economic incentives through transparent and accountable benefit-sharing mechanisms builds both conservation effectiveness, community ownership and social legitimacy.

Conclusion

The literature demonstrates that mainstream cruise tourism cannot be considered nature-based tourism. Its operational model—characterised by high emissions, limited local engagement, and externalisation of environmental impacts—conflicts with NBT’s core principles of ecological sustainability, environmental integrity, and benefit-sharing. While some cruise activities may be nature-adjacent, particularly where limited conservation financing exists, they do not meet the definitional thresholds of NBT.

However, purpose-designed, small-scale expedition cruising offers potential as a nature-based alternative. **Nature-Based Cruise Tourism (NBCT) represents a promising but underdeveloped pathway for aligning cruise operations with NBT principles.** Its success depends heavily on governance reforms, robust environmental regulation, and strengthened MPA management across the WIO. Although promising models exist in Seychelles, Réunion, and Mafia Island, NBCT currently remains the exception rather than the norm. Substantial institutional transformation is required before the wider region can support a meaningful transition toward sustainable nature-based cruise tourism.



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3.2 Research related to coastal and marine tourism

According to Mohd et al. (2022) there has been a marked increase in research publications on coastal and marine tourism since 1978, with a marked increase since 2006, illustrating an increase in the attention of researchers on coastal and marine tourism. They found that the majority of this research was, however, from the United States (14.2%), followed by Indonesia (13.4%), with South Africa being the highest WIO country (3.7%), indicating a significant lack of research on coastal and marine tourism in the WIO region. The next section looks specifically at a bibliometric analysis of nature-based tourism in the WIO.

3.2.1 Bibliometric analysis of nature-based tourism in the WIO

Author: Kevin Mearns, UNISA

On the 19th of November a Search was conducted in the Scopus database which is the largest multidisciplinary database of publications presently available.

The search criteria used in the Title keywords and abstract within the Database is listed below. The keywords used to identify publications were "coastal tourism", "marine tourism", "dolphin tourism", "whale watching", "beach tourism", "recreational fishing", "snorkeling", "scuba diving", "ocean tourism" and "cultural coastal tourism". Additional search criteria included the country names of the WIO countries namely, South Africa, Mozambique, Tanzania, Kenya, Somalia, Seychelles, Comoros, Reunion, Madagascar and Mauritius. The publications were further refined to publication date from 2016 to 2025 and only included articles and not other research outputs such as chapters.

The full structured search query used in Scopus is presented as: TITLE-ABS-KEY (("coastal tourism") OR ("marine tourism") OR ("dolphin tourism") OR ("whale watching") OR ("beach tourism") OR ("recreational fishing") OR ("snorkeling") OR ("scuba diving") OR ("ocean tourism") OR ("cultural coastal tourism") AND ("South Africa") OR (Mozambique) OR (Tanzania) OR (Kenya) OR (Somalia) OR (Seychelles) OR (Comoros) OR (Reunion) OR (Madagascar) OR (Mauritius) AND PUBYEAR > 2015 AND PUBYEAR < 2026 AND (LIMIT-TO (PUBSTAGE , "final") AND (LIMIT-TO (DOCTYPE , "ar"))

The Scopus database generated 915 articles that were then refined to 827 in English between 2016 and 2025. This indicates that the area of research is expanding very quickly in the time period indicated. The possible decrease in 2025 publications could be due to the date the results were extracted, namely 19 November 2025, so additional articles could still be forthcoming in 2025 (19 November to 31 December 2025) (see Figure 5). The leading authors in the extracted list is dominated by academics related to a series of South African Universities (See Figures 6 and 7).

Figure 5: Number of documents by year (2016-2025)

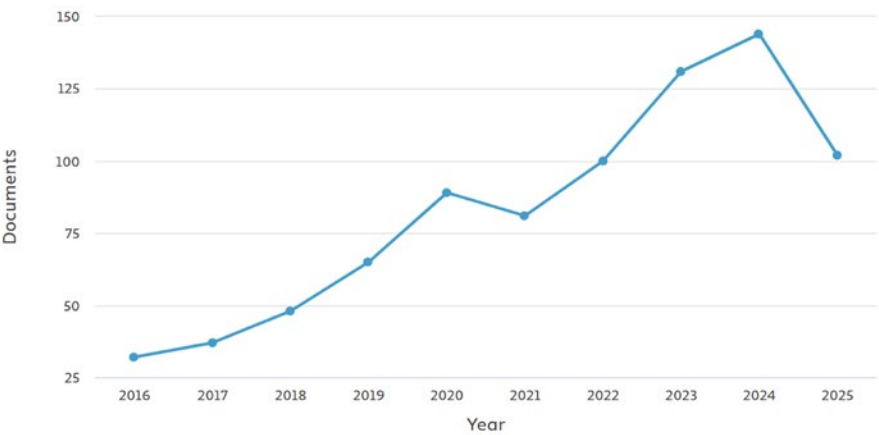


Figure 6: Number of documents by author

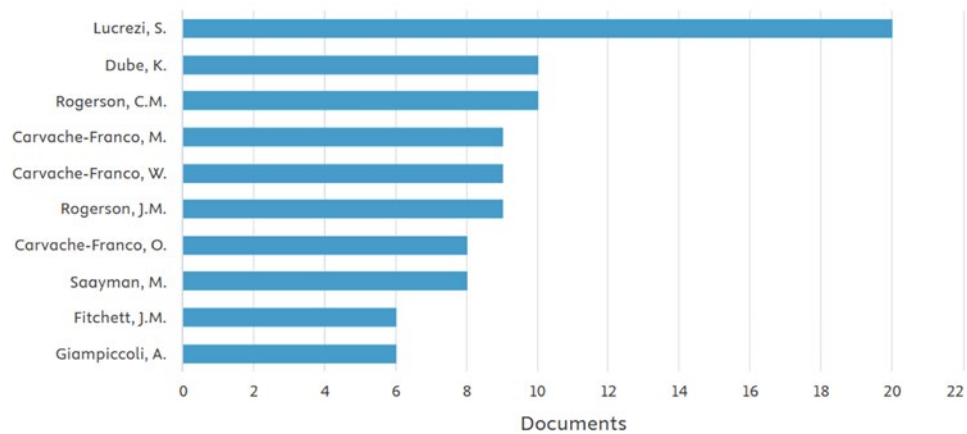
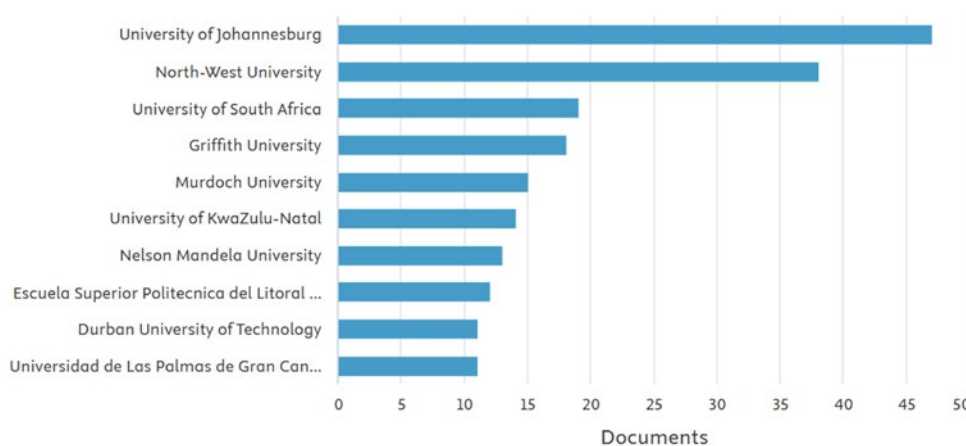




Figure 7: Number of documents by affiliation



The resultant articles bibliographic data was extracted from the Scopus database and analysed using VosViewer to illustrate the most dominant author provided keywords in the data. The eight most prominent Keyword groups (see Figure 8) identified were:

- Sustainability, sustainable development, sustainable tourism and the Blue economy (red),
- Willingness to pay and protected areas, nature-based tourism and South Africa (green),
- Tourism development, community tourism and economic growth (darker blue),
- Coastal tourism, COVID-19 and satisfaction (Yellow green),
- Ecotourism, Marine tourism and marine protected areas (purple),
- Conservation, governance and wildlife tourism (light blue),
- Tourism and climate change (orange),
- Management and scuba diving (light brown).

The Author keywords indicate the areas of primary research in the WIO in terms of Nature related marine tourism. In order to further establish what the trends in research were, an overlay visualization was undertaken in VOSViewer to determine the trends in the Author keywords over the period of 2020 to 2023 (this makes use of all the dates from 2015 to 2025). The lighted colour illustrates the recent article publication author keywords. The trend indicates a movement away from activities and conservation towards more holistic tourism management, COVID-19, environment and nature-based tourism.

In the VOSviewer visualization in Figure 9 from the oldest author keywords research to the newest trends are:

- Management, wildlife tourism, whale watching, and marine protected areas,
- Conservation, willingness to pay and scuba diving,
- Ecotourism, sustainable tourism, tourism, coastal tourism, sustainability, climate change, satisfaction and protected areas,
- Marine tourism and sustainable development,
- Environment and tourism management,
- COVID-19 and nature-based tourism.

Figure 8: Most dominant author provided keywords

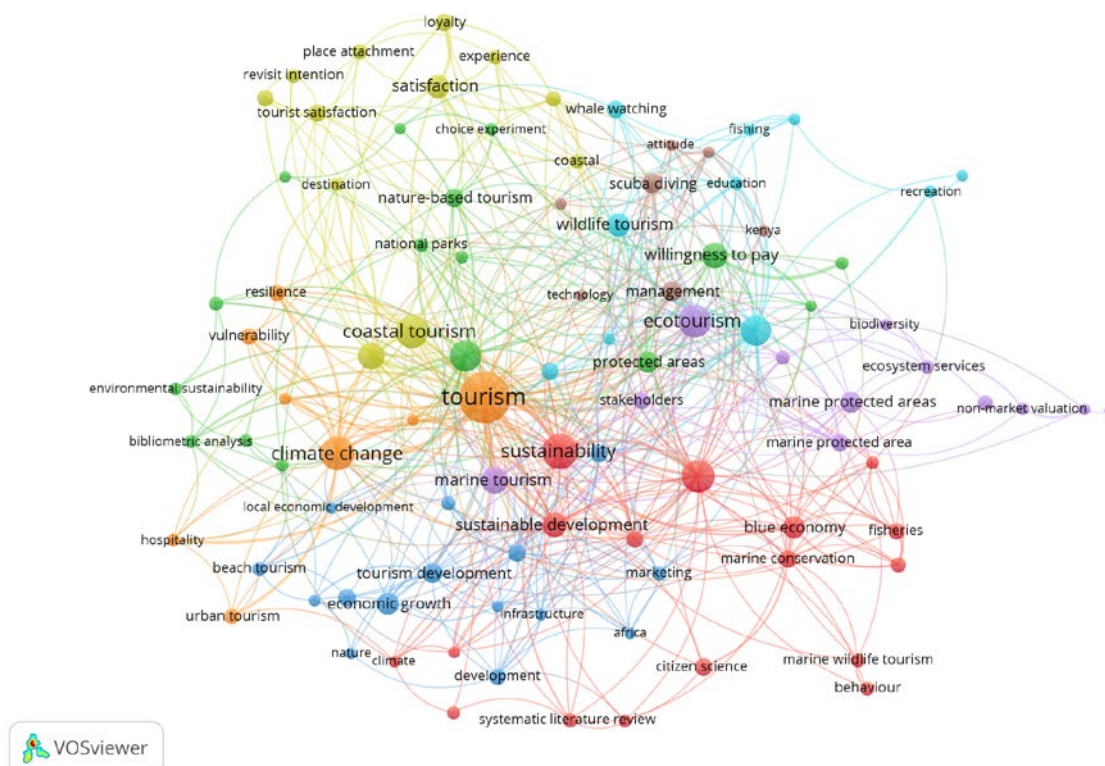
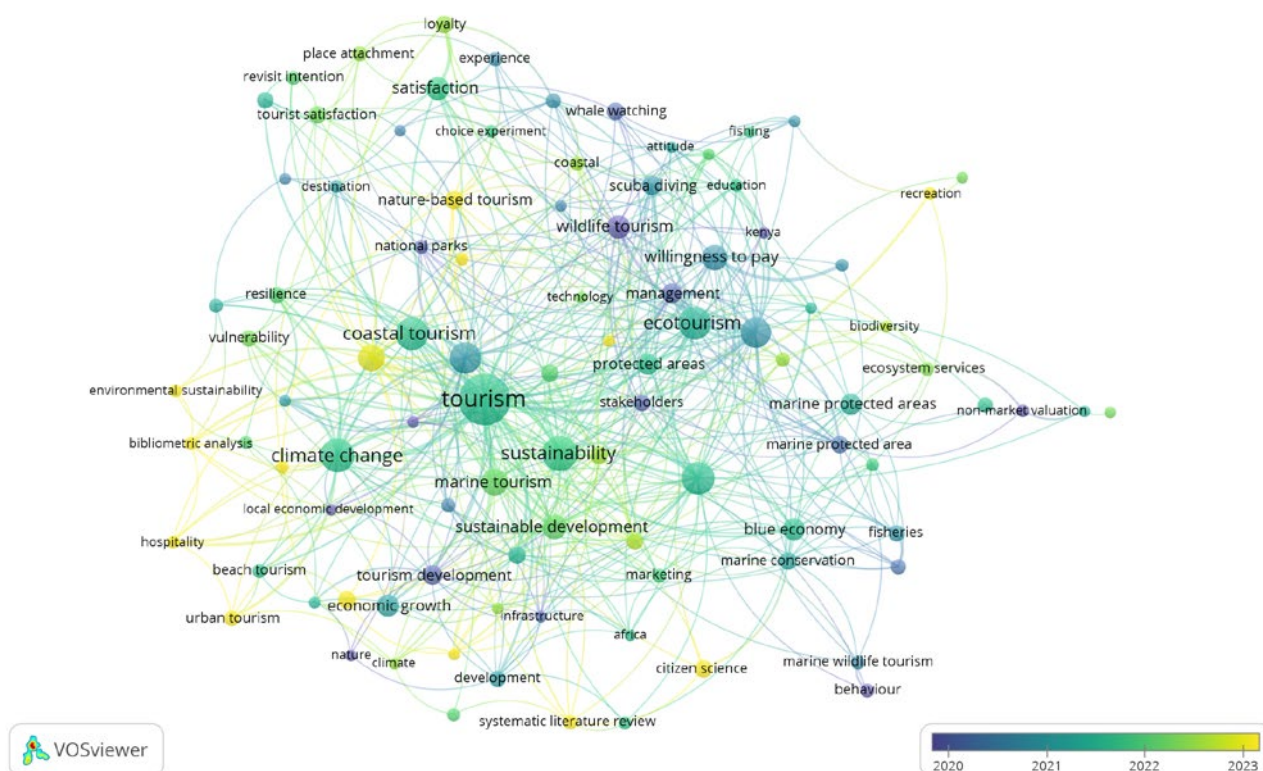


Figure 9: Oldest author keywords research to the newest trends



3.3 Types of coastal and marine NBT in the WIO region

The WIO region provides a diverse range of unique attractions and recreational activities for coastal and marine NBT. As highlighted by Celliers (2015) and described in an earlier section, the region has excellent sandy beaches, clean water, abundant sunshine, mangrove forests, lagoons and seas for sunbathing, snorkelling, dolphin and whale watching, ecotourism, fishing and other water sports.

Dwyer (2018) lists a number of coastal and marine tourism activities (see Text box 4). The majority of these are, however, not specifically nature-based, though may indirectly lead to nature-based activities.

Table 4 lists the main activities found in the WIO region as a whole with Figure 10 highlighting the main activities by country.

Table 4: The main coastal and marine NBT activities in the WIO

Activity	Icon
Scuba diving	
Snorkelling	
Recreational fishing*	
Whale watching	
Beach tourism	
Dolphin watching & swimming with dolphins	
Avitourism (Birdwatching, including for example penguins, etc.)	
Surfing and other water sports (see Figure 11)	
Shark tourism	
Sea turtle tourism	
Mangrove boardwalks	
Water sports, e.g. Kite-surfing/surfing/windsurfing/kayaking**	
Manta ray tourism	
Boat excursions (including glass-bottom boats)	

*Recreational fishing, also referred to as sportfishing or angling, is defined as fishing primarily conducted by an individual largely for leisure, and the catch may constitute a source of nutrition to some extent but is not meant to be sold (Kadagi et al., 2021).**See Figure 11 for the diversity of water sports

Text box 4: Established and new forms of coastal and marine tourism

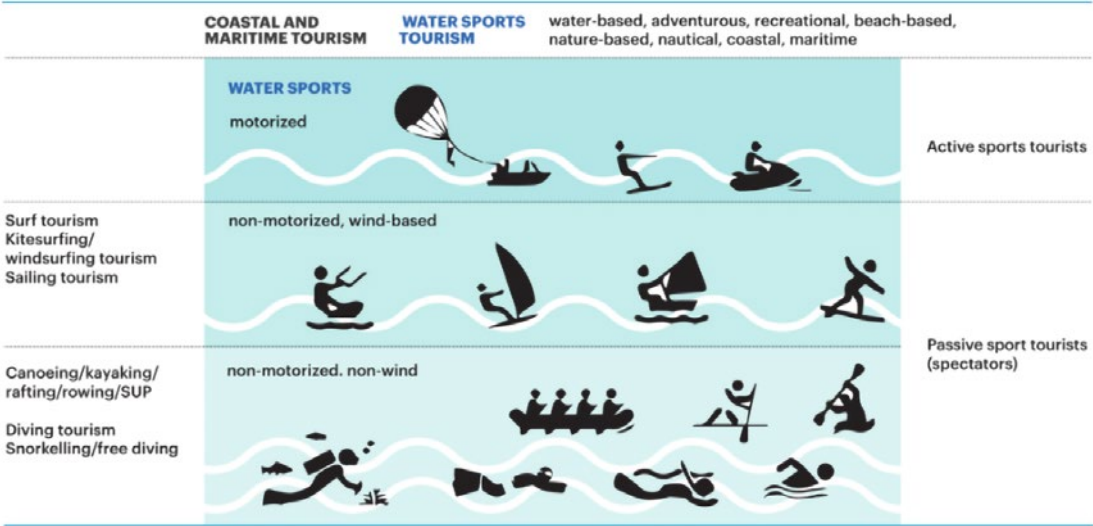
Source: Dwyer, 2018

- **Heritage tourism** includes activities such as coastal and marine archaeology, maritime heritage, lighthouses, museums, military heritage sites, natural heritage along the coast, maritime towns and cities.
- **Thematic itineraries:** Diversification and integration of coastal and inland attractors, including cultural, religious or ancient trade routes.
- **Health and spa:** Health and spa facilities are expanding along coasts, including alleged medicinal and therapeutic qualities of the sands and clays and thermal waters.
- **Complementary activities:** Expanding activities such as wine-tasting, gastronomy, conferencing, special events and festivals, health and wellbeing. Enriching and diversifying the tourism product can reduce the seasonality of visitor demand in many coastal and marine destinations.
- **Underwater hotels and sea-floor/floating resorts** are being developed in many parts of the world. In the construction activity of such facilities, the tourism industry can learn from advances in construction know-how developed by other emerging ocean industries.
- **Deep sea tourist expeditions:** Locations range from shipwrecks to hydrothermal vents and other especially attractive deep-ocean eco-systems.
- **Marine ecotourism:** Marine Parks, underwater archaeological parks, coral reefs and other locations with archaeological, ecological or historical value.
- **Recreational boating** also offers a particularly valuable opportunity to retain or revive the economies of smaller ports and port communities that are at risk of being bypassed due to changes in commercial marine and fishing traffic.
- **Yacht tourism** brings particularly high value, low impact tourism to coastal regions, stimulating the local hospitality, transport, construction and supporting trades.

Figure 10: Map of the main coastal and marine NBT activities per country

Location	Activities
1. Somalia	Canoeing, Bird watching
2. Kenya	Canoeing, Swimming, Snorkeling, Surfing, Diving, Beach relaxation
3. Tanzania	Swimming, Snorkeling, Canoeing, Surfing, Diving, Beach relaxation
4. Seychelles	Swimming, Snorkeling, Surfing, Canoeing, Bird watching, Diving
5. Comoros	Swimming, Surfing, Beach relaxation, Bird watching, Diving
6. Mauritius	Swimming, Snorkeling, Canoeing, Surfing, Bird watching, Diving
7. Réunion	Swimming, Snorkeling, Canoeing, Bird watching, Diving, Beach relaxation
8. Madagascar	Swimming, Snorkeling, Surfing, Bird watching, Beach relaxation
9. Mozambique	Swimming, Snorkeling, Canoeing, Bird watching, Diving, Beach relaxation
10. South Africa	Swimming, Surfing, Canoeing, Bird watching, Diving

Figure 11: The diversity of water sports



Source: Kepher-Gona et al., 2024



© Credit Gregoire Dubois

The contributions of overall tourism to the national economies of WIO countries range from 6.8% to 63% for the island states (Comoros and Seychelles, respectively), and 7.5% to 13.5% for mainland states (Mozambique and Tanzania, respectively) (Kepher-Gona et al., 2024). **Tourism has immense potential to enhance socio-economic development, and contribute to environmental rehabilitation** and is a priority sector for development in all WIO countries (Celliers, 2015). There are, however, also a range of negative social and environmental impacts that require mitigation concomitant with the growth and development of the industry, including a lack of integrated development planning, the need for community development and involvement, and habitat degradation (Celliers, 2015). The lack of socio-political stability in countries in the region also detracts from the potential benefits of a healthy coastal and marine NBT industry (Celliers, 2015). Kepher-Gona et al (2024, pp 8-11) provide detailed information on tourism arrival numbers, contributions to GDP and employment, etc. for each of the WIO countries which gives an excellent overview of the overall tourism sector. The next section looks specifically at the value of coastal and marine NBT.

3.4 The value of coastal and marine tourism

The majority of countries, as well as large institutions such as the United Nations Tourism Organisation, World Bank, United Nations Development Programme, etc., provide statistics related to the overall travel and tourism sector, with little detail provided specifically on coastal and marine tourism and even less on coastal and marine nature-based tourism. This section looks at the value of coastal and marine tourism as a whole, as disaggregated data for NBT was not found.

Rogerson (2020) highlights that measuring the contribution of tourism to the blue economy and the assessment of its impacts across countries is problematic for several reasons:

- The tourism sector does not fit Standard Industrial Classifications - it is *"a diffuse and multiple industry consisting of closely associated and interacting segments such as transportation (international and domestic); accommodation; intermediaries such as tour operators and travel agents; catering services; retail such as souvenirs; local attractions and activities; vehicle rental and so forth"* (Hampton et al., 2018: 362).
- There are also differing definitions applied in countries for classifying 'tourists' (day visitors as opposed to overnight visitors) and often generally weak systems of data collection (particularly in countries of the global South) resulting in unreliable or unavailable tourism data for many countries.

It is important to keep these caveats in mind when reviewing the economic and other statistics related to coastal and marine NBT in this report.

Coastal and marine tourism can directly benefit ecological infrastructure, and support the conservation of natural resources through for example the revenue from marine park-entrance fees, user permits and similar sources being allocated specifically to protect and manage coastal and marine areas (Dwyer, 2018). The dependency of tourism on attractive coastal and marine environments and, in many cases, cultural heritage can lead to a greater awareness of their value amongst all stakeholders, leading to more commitment and support for their protection (UNEP, 2011, 2012 in Dwyer, 2018).

As with all forms of tourism, coastal and marine NBT contributes to local, national and regional economies in multiple direct, indirect and induced ways, including through, amongst others, accommodation, transport, food, activities, park fees, guide fees, curios, etc. There is extensive literature on the value chains and multipliers (Mitchell & Ashley, 2010; GiZ, 2020) related to tourism in general, a large amount of which applies to coastal and marine NBT as well.

3.4.1 Global context

Coastal and marine tourism is one of the largest sectors of the global ocean economy and has both socio-economic and ecological value. The sector generates revenues, supports businesses and millions of livelihoods by providing direct and indirect job opportunities, and also contributes to coastal and marine biodiversity conservation (Northrop, 2022). Kepher-Gona et al. (2024) suggest that coastal and marine tourism can drive a sustainable blue economy if economic sectors operate in harmony with ocean and coastal resources, while respecting social and cultural values of communities that depend on these resources. **In 2023, tourists spent approx. USD 3 trillion in coastal and marine destinations, and the sector reached a total economic value of USD 3.3 trillion, or 3.2% of global GDP** (WTTC, 2024). Coastal and marine tourism also creates extensive job opportunities: WTTC (2024) reported that this sector supports 100 million direct and indirect jobs worldwide. Coastal tourism alone accounts for 7% of the global employment and 5% of the global GDP (Kepher-Gona et al., 2024). Governments also benefit from this sector through direct taxes: in 2023, governments received approx USD 820 billion from direct tax revenue, which increased to USD 1.3 trillion when including the wider supply chain (WTTC, 2024). These trends match broader projections showing that coastal and marine tourism will account for approx. 26% of the total value-added of the ocean economy sector by 2030 (Tonazzini et al., 2019). Additionally, it is projected that coastal and marine tourism will provide approx. 8.5 million jobs by 2030 (Brumbaugh & Patil, 2017).

Coastal and marine tourism generates revenues from various activities. For instance, reef tourism generates approx. USD 36 billion annually and over 350 million people visiting to participate in reef-related activities (Tonazzini et al., 2019). Cruise tourism is another activity contributing significantly to the coastal and marine tourism sector (though as discussed earlier, not specifically coastal and marine nature-based tourism) providing 1.17 million job opportunities and contributing USD 150 billion to the global economy in 2018 (Northrop, 2022). Marine wildlife tourism also plays an important role in the coastal and marine tourism sector. According to Tonazzini et al. (2019), 600,000 people spend at least USD 30 million annually watching sharks worldwide. A study by Vianna et al. (2012) revealed that the government of Palau receives USD 1.5 million in taxes and USD 1.2 million in salary for local communities from shark diving alone. This highlights that **both governments and local communities benefit from coastal and marine tourism activities through its contribution to socio-economic development.**

Sustainably managed coastal and marine tourism also plays an important role in supporting conservation efforts, as the sector depends directly on healthy coastal and marine ecosystems. A number of countries allocate part of the revenues generated from coastal and marine tourism, such as park fees and permits, to the management and monitoring of marine protected areas (Northrop, 2022). Tourism operators also have strong incentives to protect coastal and marine resources because their success and growth depend on these resources. When tourism is managed responsibly, there is investment in conservation through park levies, restoration projects, community ranger support and private or philanthropic initiatives (Snyman, undated). These investments help safeguard ecosystems that attract visitors and sustain local jobs. Tourism revenues can also create opportunities for developing other ocean economy activities that rely on well-managed coastal and marine resources (Ibid.).

3.4.2 Value of coastal and marine tourism in the WIO region

Coastal and marine tourism plays an important socio-economic role in the WIO region. This sector accounts for approx. 69% of the USD 20 billion generated from the ocean-based economic activities in the region (Kepher-Gona et al., 2024; Smits et al, 2017). Moreover, the WIO region is the 4th largest in terms of Gross Marine Product (Kepher-Gona et al., 2024). Table 5 gives an overview of travel and tourism's contribution to the WIO countries covered in this report. These figures are for all tourism, not specifically coastal and marine tourism. Countries such as South Africa, Madagascar, Kenya and Tanzania have a diversified tourism product, which also includes a large amount of terrestrial nature-based tourism, while in countries such as Seychelles, Comoros, Mauritius the tourism sector is largely focused on coastal and marine tourism, a large amount of which is also nature-based.

Table 5: Travel and tourism's contribution to WIO country economies

Country	Length of coastline (km)	International tourism arrivals (million)	International tourism receipts (billion, USD)	Travel and tourism contribution to GDP (billion, USD)	Travel and tourism employment (million)
Comoros	427	0.03	0.08	0.15	0.022
Kenya	536	2.3	3.5	7.5	1.6
Madagascar	5,600	0.33	0.79	1.6	0.83
Mauritius	330	1.4	2.2	2.8	0.075
Mozambique	2,700	0.49	0.27	1.2	0.67
Reunion	210	0.56	-	2	0.028
Seychelles	491	0.35	1.2	1.07	0.025
Somalia	3,025	-	-	-	-
South Africa	3,000	10.5	6.8	30.8	1.46
Tanzania	1,424	2.3	4.4	7.8	1.42
Total	17,743	18.26	19.24	54.92	6.13

Sources: See country case studies for WTTC national level report references

Coastal and marine NBT activities such as snorkelling, scuba diving, whale watching, beach tourism, etc. provide socio-economic benefits across the WIO countries, with each country benefiting in different ways that contribute to the sector's growth in the region. Below are some examples of coastal and marine NBT values in WIO countries (more detail is provided on these in the individual country case studies):

- **Comoros:** coastal and marine tourism contributed 1.7% to GDP in 2024 (World Bank, 2025b). Tourism linked to coral reefs is estimated to have an annual economic value of approx. USD 8 million (Union des Comores, 2016).
- **Kenya:** Marine Protected Areas (MPAs) generate approx. USD 9.2 million annually in park fees for conservation efforts (KWS, 2024a). Coastal tourism provides approx. 60% of overall tourism earnings in Kenya (WIOMSA and UN-Habitat, 2021).
- **South Africa:** In 2021, an estimated 1.33 million recreational fishers participated in marine and freshwater fisheries, generating approx. USD 2.2 billion in annual economic activity and supporting approx. 94,000 full-time jobs (Potts et al., 2021). The shark-diving sector is estimated to generate approx. USD 2.6 million at Protea Banks in KwaZulu-Natal, while it provides tourism earnings of approx. USD 3.04 million annually in Gansbaai (Dicken et al., 2025; Mabaleka et al., 2020).
- **Tanzania:** Dive tourism in Zanzibar is estimated to generate approx. USD 2.5 - 7.4 million (Ngazy et al., undated).
- **Mauritius:** Whale watching attracted 21,000 visitors, generating over USD 2.6 million in 2008 and employing 35 people (Gannon & Sandron, 2014; O'Connor et al., 2009).
- **Réunion:** In 2008, an estimated 3,248 tourists participated in whale-watching excursions, generating approximately USD 460,204 in total revenue, of which USD 94,127 was attributed to direct expenditure and USD 366,077 to indirect economic contributions (O'Connor et al., 2009).
- **Seychelles:** Beach tourism generates approx. USD 160 million and attracts approx. 94,000 visitors annually, while diving and snorkelling brings in approx. USD 51.5 million, including USD 17.7 million spent within MPAs (Nature Conservancy, 2022). Recreational fishing generates approx. USD 36-48 million per annum (Ministry of Fisheries and the Blue Economy, 2022).

- **Madagascar:** Approx. 3,137 visited Sainte-Marie for whale tourism in 2014 and contributed approx. USD 367,000 to tourism earnings (Gannon et al., 2015).
- **Mozambique:** Between February 2023 and February 2025, Dolphin Encounters Research Center (DERC) recorded 4,284 participants, contributing over USD 13,000 to the park through snorkel taxes (Gullan, 2025). Manta ray-focused tourism generates approx. USD 10.9 million in direct revenue for dive operators annually (Venables et al., 2016).

3.5 Conclusion

Coastal and marine tourism development, as with all tourism development, must accord with the principles of sustainability: taking full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities (UNWTO, 2005 in Dwyer, 2018). This section has provided a broad overview of coastal and marine tourism and where possible, specifically in terms of coastal and marine NBT. Disaggregating information and data to focus specifically on NBT was difficult and in many cases not possible as data of this nature is not currently being collected and is a challenge which needs to be addressed.

The next sections provide country case studies for nine WIO countries, including a description of the coastal and marine NBT activities and where possible, the socio-economic value of these, as well as opportunities and challenges related to coastal and marine NBT in the country.

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4

Country case studies



4. Comoros



Land area
1,653km²



Total tourism numbers
0.03 million



Coastal and marine area
164,493km²



Total tourism contribution to GDP (10%)
USD 146.3 million



Population
850,387



International visitor spending (71.2%)
USD 93.8 million



Protected area size (marine) (0.38%)
629km²



Domestic visitor spending (28.8%)
USD 38 million

Sources: UNEP-WCMC, 2025; UNWTO, 2025; World Bank, 2025; WTTC, 2024

4.1 Introduction

The Union of the Comoros is positioned at the northern entrance of the Mozambique Channel, with a **coastline exceeding 427 km and an Exclusive Economic Zone (EEZ) more than 100 times larger than its land area** (ASCLME, 2012). This extensive marine space contains coral reefs, mangroves, seagrass beds, volcanic seabeds, and turtle nesting beaches, which are of high ecological and economic value (World Bank, 2025b) and which support local livelihoods and form the foundation of coastal and marine tourism (World Bank, 2025a; Sari et al., 2023). The archipelago's protected areas, notably Mohéli National Park, illustrate its global ecological significance as it provides habitat to coelacanths (*Actinistia*), humpback whales (*Megaptera novaeangliae*), and nesting turtles (Granek & Brown, 2005; Said et al., 2000). With **over 1,200 recorded marine species**, several of which are threatened (World Bank, 2025a), Comoros' biodiversity supports diving, snorkelling, whale watching, and community-based tourism. **These assets position coastal and marine NBT as a key growth sector for the country's emerging blue economy.**

4.2 Statistics and economic significance of coastal and marine NBT

Travel and tourism contributed approx. USD 146.3 million (10%) to Comoros' Gross Domestic Product (GDP) in 2023, supporting 22,400 jobs (10.5%) (WTTC, 2024). Although only a small island, Comoros is endowed with rich coastal and marine assets and in 2022 had 28,800 international arrivals (UNWTO, 2025). Despite this natural wealth, coastal and marine tourism contributed only 1.7% to GDP in 2024, well below regional peers such as Mauritius and Seychelles, due to **poor air and maritime connectivity, limited accommodation capacity, and environmental pressures** (World Bank, 2025b). Despite its limited contribution at the national level, site-specific ecosystem valuations highlight significant economic importance of coastal and marine tourism in Comoros. The economic value of coral reef tourism services in Mohéli MPA has been estimated at approx. USD 3.5 million annually, equivalent to 1.3% of national GDP, 15.2% of public investment, and 10.7% of exports of goods and services. Whereas, at the country level, **the annual tourism value of coral reefs has been estimated at approx. USD 8 million** (Union des Comores, 2016).

Although coastal and marine tourism statistics are not separately reported, the government recognises its potential through initiatives such as the Moroni Declaration on the Blue Economy and participation in the Great Blue Wall, read more in Text box 54 on page 148. in the report introduction (IUCN, 2024a). Detailed statistics related to specific coastal and marine NBT activities were not found but the sections below illustrate that they form an important part of the local and national economy. It is important that this data is collected going forward to effectively and sustainably manage coastal and marine NBT and account for its important contribution to livelihoods, the environment and the economy.

4.3 Overview of coastal and marine nature-based tourism activities

Comoros is a biodiversity-rich island state whose coastal and marine ecosystems, including coral reefs, seagrass beds, and habitats for endangered species such as green turtle (*Chelonia mydas*) and dugong (*Trichechus dugon*), form the foundation of its emerging coastal and marine nature-based tourism (NBT) sector (Nairobi Convention, 2025; IUCN, 2024a). **The country, a recognised biodiversity hotspot, promotes conservation and ecotourism through Mohéli National Park, a UNESCO biosphere reserve and the first community-managed marine protected area in the country**, empowering local communities (UNDP, 2024).

Guided by the Comoros Emerging Plan 2030 and supported by UNDP, the French Development Agency, and the Global Environment Facility, Comoros integrates sustainable tourism, fisheries, and climate-resilient management into its blue and green economy strategy. Despite challenges such as forest loss, coastal erosion, and limited infrastructure, these efforts **position Comoros as a high-value, eco-conscious destination**, demonstrating how conservation and inclusive economic growth can advance in tandem (UNDP, 2024; World Bank, 2025b).

Coral reef degradation, coastal erosion, and marine pollution, however, threaten both biodiversity and tourism viability (World Bank, 2025a). In response, innovative governance models have been introduced, notably Mohéli Marine Park (the country's first and most significant Marine Protected Area (MPA), encompassing an area of 404 km² that covers reefs, islets, and open ocean (Nairobi Convention, 2025)), established in 2001 and later expanded into Mohéli National Park (see Text box 5). **This pioneering initiative integrates community co-management, with more than 80% of management led by local stakeholders**, protecting sea turtle nesting sites, reef ecosystems, and fisheries while providing ecotourism opportunities (Granek & Brown, 2005). **While the model has strengthened conservation outcomes and local empowerment, it remains challenged by limited enforcement capacity, political instability, and dependence on donor support** (Ibid.).

Mohéli National Park serves as a sanctuary for numerous species and is central to the country's ecotourism model. The Park has inspired efforts to expand conservation, with three further MPAs proposed, the Coelacanth, Mitsamiouli-Ndroudé, and Shisiwani National Parks, to increase Comoros' MPA coverage (Ibid.).

Priorities under the Plan Comores Émergent (PCE 2030) include upgrading airports in Mohéli and Anjouan, expanding maritime services, and promoting eco-resorts to attract higher-value markets (World Bank, 2025b). **Niche opportunities exist in diving, whale and turtle watching, and cultural heritage tourism**, complemented by innovations such as seafood festivals and digital platforms to enhance marketing and visitor services (World Bank, 2025b). **If effectively managed, coastal and marine NBT can diversify Comoros' economy, provide sustainable livelihoods, and position the country as a distinctive, eco-conscious destination within the Vanilla Islands network, while ensuring long-term conservation of its fragile ecosystems** (World Bank, 2025a).

The following sections describe various coastal and marine NBT activities in Comoros. Socio-economic data related to the activities was largely not found, but is important in terms of understanding the impact of different activities and ensuring that their true value is understood and incorporated into policy- and decision-making.

4.3.1 Beach and coastal nature activities

Comoros offers a coastal and marine tourism experience characterised by high environmental quality and cultural authenticity, supported by its **largely pristine and uncrowded coastal and marine environment** (World Bank, 2023). The archipelago's

Text box 5: The Mohéli Marine Park: a community-led sanctuary

Sources: Equator Initiative, 2012; IUCN, 2024a; Nairobi Convention, 2025; Poonian & Hauzer, 2008

The Mohéli Marine Park is not only **Comoros' first national Marine Protected Area (MPA), but a globally celebrated model of community-led conservation**. Covering 404 km² of pristine coastline, this Park is a stunning marine sanctuary where locals actively co-manage its protection, providing an inspiring example of how tourism can directly benefit the people who live alongside nature. Visitors come to the Park for an authentic ecotourism experience, with the chance to snorkel over vibrant coral reefs or witness endangered green sea turtles (*Chelonia mydas*) nesting on the beaches, all guided by local villagers who are the true stewards of this unique environment. This model has good potential, as tourism-related activities can diversify income sources, reduce pressure on overfishing, and strengthen the link between biodiversity conservation and community well-being.

volcanic origins have shaped a varied coastline, ranging from the white sandy beaches of northern Grande Comore to the black volcanic sands of Mohéli, which border the Indian Ocean (Dahari, 2015). The country attracts a niche but expanding group of travellers interested in tranquillity, cultural immersion, and interaction with nature. Its appeal is rooted in relatively undisturbed landscapes and low-impact activities, including swimming, sunbathing, and coastal walks (Vanilla Islands, 2025).

Coastal tourism in Comoros is intrinsically linked to community-based conservation, which serves as a unique selling point for the destination (Equator Initiative, 2012). The benefits of beach tourism, including revenue and employment, flow directly to local populations, reinforcing a sustainable cycle in which conservation is tied to livelihoods (IUCN, 2024a).

4.3.2 Scuba diving

Data on scuba diving is limited, with much of the available information coming from travel blogs and informal accounts rather than peer-reviewed or official publications. The country's marine landscapes are remarkably diverse, featuring sites such as the Vailheu Bank, a submerged volcanic wall rich with pelagic fish, and the wreck of the *Massiwa*, a 260-foot cargo vessel, which are both popular among PADI-certified divers (PADI, undated). Around Mohéli, approx. 20 dive sites stretch across coral gardens, drop-offs, and caves, where divers may encounter green turtle (*Chelonia mydas*), hawksbill turtle (*Eretmochelys imbricata*), manta ray (*Mobula birostris*), bottlenose dolphin (*Tursiops truncatus*), reef shark (*Carcharhinus* spp.), and even seasonal humpback whales (*Megaptera novaeangliae*) (DivingAway, undated). Efforts to support sustainable diving infrastructure include eco-guide and eco-guard training programmes in Itsamia, where local rangers receive PADI certifications to manage diving and conservation (Plongeurs du Monde, undated; Ahmed, 2024)

Across the archipelago, there are an estimated 820 species of saltwater fish and at least 14 species of marine mammals (Vanilla Islands, 2020; Kiszka et al., 2006). The waters around Grande Comore offer a distinctive diving experience, with sites featuring deep walls, volcanic lava flows, and impressive pinnacles (Vanilla Islands, 2020). However, the most compelling dive experience in the Comoros is the pursuit of the coelacanth (*Latimeria chalumnae*), see Text box 6.

4.3.3 Whale and dolphin watching

The Comoros archipelago is located in a critical migratory corridor within the Western Indian Ocean, making its waters a significant habitat for marine mammals (Kiszka et al., 2006). This strategic position underpins a growing ecotourism sector focused on whale and dolphin watching. Comoros' waters are **home to at least 14 species of marine mammals**, including year-round populations of spinner dolphin (*Stenella longirostris*) and common bottlenose dolphin (*Tursiops truncatus*) (Vanilla Islands, 2020).

Text box 6: Coelacanth diving in the Comoros

Sources: James, 2006; Scuba diver life, 2015

The coelacanth (*Latimeria chalumnae*), a deep-sea fish once thought to be extinct, is Comoros's unique marine heritage. Found in the volcanic caves off the coast of Grande Comore, this "living fossil" presents a unique challenge and opportunity for the dive industry. Sighting the coelacanth requires specialised deep diving equipment and an intimate knowledge of the seabed, making it an **exclusive, high-value experience for advanced divers**. While sightings are extremely rare, the species' iconic status provides Comoros with **a powerful international drawcard that no other destination can replicate**. Dive operators, working in partnership with conservation bodies, adhere to strict protocols to ensure that any search for the coelacanth is done with the utmost respect for the animal and its environment. This high-end, low-impact pursuit exemplifies Comoros's strategy of leveraging its unique biodiversity to build a sustainable and exclusive brand of marine ecotourism.

Whale sightings in Comoros are seasonal, with humpback whales (*Megaptera novaeangliae*) migrating from the Antarctic to the warm, sheltered waters of the archipelago between July and October for breeding and calving (Nairobi Convention, 2025).

Whale and dolphin watching in Comoros operates at a small, responsible scale, reflecting the country's commitment to low-impact tourism (DivingAway, undated). Excursions are typically organised by local operators and are guided by strict codes of conduct to ensure the well-being of the animals (Kiszka et al., 2006).

4.3.4 Sea turtle observation

Comoros, especially Mohéli Island, is recognised as one of the most important sites for observing green turtles (*Chelonia mydas*) in the Indian Ocean. Long-term monitoring recorded **over 69,000 successful nestings between 1999 and 2014**, with activity peaking during the austral winter months (Bourjea et al., 2015). Community-led protection has enabled the growth of this remarkable population, making sea turtle observation a defining feature of Comoros's coastal and marine NBT (Ibid.). The ecological significance of Mohéli lies in its role as an important nesting site for the green sea turtle (*Chelonia mydas*), which occurs in high densities and contributes to the island's distinctive tourism offering (Equator Initiative, 2012). A past study estimated that up to 12,000 female green turtles come ashore to nest on the island's beaches, a figure that highlights the country's role in regional turtle conservation (Freed & Granek, 2015). Moreover, this figure makes **Mohéli one of the largest green turtle nesting sites in the Indian Ocean** (Moidjio, 2020).

Sea turtle observation tours are managed and guided by local communities, who have been instrumental in the turtles' protection and are now the primary beneficiaries of the revenue generated from tourism (Equator Initiative, 2012). This approach, which links species conservation with sustainable livelihoods, is exemplified by the nesting sites of Itsamia on Mohéli (see Text box 7).

Text box 7: Itsamia: Comoros's turtle sanctuary

Source: Freed & Granek, 2015; Nairobi Convention, 2025

The village of Itsamia on Mohéli Island has become a **recognised example of community-based conservation**, transforming a historic threat to sea turtles into a sustainable tourism activity. As a crucial nesting site for the endangered green sea turtle (*Chelonia mydas*), the beaches around Itsamia host a significant annual event where hundreds of turtles come ashore to lay their eggs. For decades, the community has protected this process from poaching through **a co-managed conservation programme that has created a cycle of conservation and livelihood support**. Today, tourists can participate in guided nocturnal tours to observe this natural occurrence under the strict supervision of local guides. **Revenue from these tours is directed back to the community** and contributes to the costs of patrolling the nesting sites, illustrating the link between sustainable tourism and local livelihoods.

4.4 Challenges facing coastal and marine NBT in Comoros

- **Lack of specific economic data:** The absence of disaggregated data for tourism activities such as scuba diving, whale watching, and recreational fishing makes it challenging for policymakers and investors to evaluate the sector's direct economic contribution. Without reliable statistics, planning and targeting investments for sustainable growth becomes less effective.
- **Vulnerability to environmental threats:** Coastal and marine ecosystems in Comoros are highly sensitive to environmental pressures. Coral reef degradation, coastal erosion, marine pollution, and the impacts of climate change threaten the biodiversity and natural assets that form the foundation of nature-based tourism, putting the sustainability of the sector at risk.
- **Governance and financial constraints:** Although community co-management models have shown promise in protecting marine biodiversity, the overall governance framework is constrained by limited institutional capacity, inconsistent enforcement of regulations, and dependence on donor funding. These factors make it challenging to manage protected areas and support large-scale, sustainable ecotourism development.
- **Risk of over-reliance on marine ecosystems:** The tourism industry in Comoros is heavily dependent on a few unique attractions, such as green turtle nesting sites, the coelacanth, and dive locations. Any ecological decline, natural disaster, or other unforeseen events affecting these assets could disproportionately impact the sector and reduce its resilience.
- **Limited international awareness:** Comoros is not widely recognised as a tourist destination, which limits its ability to compete with more established islands in the Indian Ocean. A lack of consistent global marketing, promotional campaigns, and international visibility constrains visitor numbers and the development of higher-value tourism markets.

4.5 Opportunities for coastal and marine NBT in Comoros

- **Community-based ecotourism:** The country's proven track record of successful community-led conservation, as seen in the Mohéli Marine Park, presents a powerful opportunity to scale this model, creating authentic, low-impact tourist experiences that directly benefit local communities.

- **High-value, low-volume niche:** The absence of mass tourism allows Comoros to strategically position itself as an exclusive, high-end destination for discerning travellers who are willing to pay a premium for unique, authentic, and relatively private natural experiences.
- **Unique and iconic biodiversity:** The presence of globally iconic species such as the coelacanth and humpback whales, along with having the most significant green sea turtle nesting site in the Indian Ocean, provides an unparalleled competitive advantage for marketing the country as a destination for specialist coastal and marine NBT.
- **Regional and global partnerships:** Initiatives such as the Great Blue Wall and partnerships with international bodies such as the World Bank provide a framework for attracting international investment, technical expertise, and political support for developing a sustainable blue economy.
- **Leveraging traditional knowledge:** The deep-seated connection of local communities to the ocean, coupled with their traditional knowledge of marine ecosystems, offers an opportunity to develop unique tourism products and guiding services that are both authentic and culturally enriching.
- **Expanding marine activities:** There is significant potential to expand the range of coastal and marine activities beyond existing offerings, including developing specialised services for ethical shark diving, responsible whale watching, avitourism and high-end big-game fishing, to cater to diverse and lucrative tourist segments.

Comoros' unique biodiversity and existing NBT products and services have positioned it well to unlock and further grow its coastal and marine NBT sector further through targeted capacity building, appropriate infrastructure development, diversified tourism products and services, improved access and increased regional and international marketing.

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5. Kenya



Land area
583,127km²



Coastal and marine area
123,783km²



Population
56,432,944



Protected area size (marine)(0.59%)
725km²



Total travel & tourism jobs
1.55 million



Total tourism numbers
2.3 million



Total tourism contribution to GDP (7%)
USD 7.5 billion



International visitor spending (36.4%)
USD 1.9 billion



Domestic visitor spending (63.6%)
USD 3.3 billion

Sources: Ministry of tourism and wildlife, 2024; UNEP-WCMC, 2025; UNWTO, 2025; World Bank, 2024; WTTC, 2024

5.1 Introduction

Kenya's coastline is approximately 536 km long, characterised by diverse ecosystems from coral reefs to mangrove forests (Samoilys et al., 2015). The country is increasingly defining its global tourism reputation beyond terrestrial safaris (Ibid.). This strategic harnessing of its Indian Ocean assets serves as a pillar of coastal and marine Nature-Based Tourism (NBT) (Tourism Research Institute, 2024). Coastal and marine NBT, encompassing wildlife viewing, water sports, and cultural immersion, forms an essential component of Kenya's tourism economy, aligning with global sustainability trends and its national Blue Economy agenda see Text box 8 (Kindiki, 2025). The tourism sector leverages Kenya's strategic position along the Indian Ocean. It hosts some of Africa's most biodiverse coastal and marine environments, including critical habitats for endangered species such as green sea turtles (*Chelonia mydas*) and whale sharks (*Rhincodon typus*) (Nairobi Convention, undated.a).

Text box 8: Kenya's Blue Economy agenda – driving sustainable growth

Sources: GAA, 2025; Kindiki, 2025; Musyoka & Koech, 2025; NEMA, 2024

Kenya's Blue Economy agenda is a national strategy for the sustainable utilisation of ocean resources to drive economic growth, enhance livelihoods, and create jobs, while safeguarding the health of marine ecosystems. It was developed in response to the increasing importance of coastal and marine resources and the need to better coordinate ocean-related sectors under a common policy framework. Currently, **the blue economy contributes Kenyan Shilling (KES) 37 billion (approx. USD 286 million) to national Gross Domestic Product (GDP)**, and the government aims to significantly increase this to KES 150 billion (approx. USD 1.16 billion) by 2027. The agenda is led by the Ministry of Mining, Blue Economy, and Maritime Affairs and provides strategic direction for the sustainable development of Kenya's coastal and marine economy.

It focuses on pillars such as sustainable fisheries and aquaculture, with the coastal and marine value chain already supporting approx. two million jobs. The agenda also prioritises coastal tourism development, maritime transport infrastructure (including the Shimoni Fish Port), marine renewable energy, and biotechnology, all of which are designed to transform Kenya's coastal and marine assets into a robust and sustainable economic engine. This Strategy is also supported by government regulatory frameworks, such as the emerging National Marine Spatial Plan, which guides the sustainable use of ocean resources and ensures a balance among environmental conservation, social equity, and economic growth, and the Kenyan Strategic Plan 2023-2027.

Text box 9: Shimoni's Fisherfolk-to-Guides programme within the Shimoni-Vanga Joint Co-management Area

Sources: Tschentscher et al., 2023; Ministry of Mining, Blue Economy and Maritime Affairs, 2024; Shaban, 2024

Shimoni is transforming its coastal tourism by empowering local fisherfolk as guides through the innovative fisherfolk-to-guides programme. The programme operates within the broader governance and conservation framework of the Shimoni-Vanga Joint Co-management Area (JCMA), which brings together seven beach management units to jointly manage fisheries, coastal systems and associated livelihood activities. The fisherfolk-to-guides programme, implemented under the Kenya Marine Fisheries and Socio-Economic Development (KEMFSED) project, has trained 76 fisherfolk from Kwale County as coxswains and provided 19 modern vessels, including a glass-bottom boat for ecotourism. This initiative improves safety standards by replacing informal and wooden canoes with regulated boats, while enabling locally guided ecotourism activities such as snorkelling, dolphin viewing and visits to Shimoni Slave Caves, coral gardens and mangrove boardwalks. By combining improved fishing capacity with ecotourism training, Shimoni is positioning itself as a destination that offers authentic, community-led experiences while diversifying livelihoods.

Tourism activities supported through the programme are closely linked to conservation measures implemented under the JCMA, particularly community-led spatial closures locally referred to as *tengefu*. These no-take or restricted-use zones include Changai and Bati (Shimoni), Panga Tatu (Mkwiro), Wasini Community Conservation Area, Kibuyuni Local Marine Reserve, Kwikwiri (Majoreni), and Mwarembo (Vanga). Managed by beach management units (BMUs), the *tengefu* are intended to support fish stock recovery, protect critical habitats, and, in several cases, serve explicit tourism and non-extractive use objectives, including emerging seagrass-based carbon initiatives. Ecological monitoring under the JCMA Plan indicates that these community-led management measures are operating within a comparatively healthy and biodiverse marine system. Mean hard coral cover across surveyed sites in the Shimoni-Vanga area is approximately 32%, notably higher than the national average of 18%. Several BMU-managed sites, including Shimoni, Wasini, Kibuyuni, Mkwiro, and Vanga, record coral cover exceeding 40%. **The area supports high reef biodiversity**, with at least 239 species of hard corals documented, alongside extensive seagrass meadows that are among the most widespread on Kenya's south coast. These ecological conditions enhance the quality of reef and seagrass habitats used for snorkelling, reef exploration, and guided marine tourism, reinforcing the link between spatial protection and tourism value.

The programme is further supported by a government investment of KES 58 million (approximately USD 448,014) in modern fishing gear, cold storage facilities, and capacity building for beach management units. In combination with fisheries co-management measures, these investments aim to reduce post-harvest losses, promote responsible fishing practices, and diversify livelihoods. **For tourists, the experience goes beyond sightseeing, offering genuine cultural immersion and meaningful engagement with local communities. For fisherfolk, it ensures safer working conditions, improved incomes, and greater participation in Kenya's growing blue economy.** This dual focus on livelihood improvement and sustainable ecotourism strengthens Shimoni's competitiveness on the coast and showcases how community-driven initiatives can drive equitable, long-term growth.

The Kenya Coast and Cultural Heritage Blueprint 2030, developed by Jumuiya ya Kaunti za Pwani, positions coastal tourism and the Blue Economy as shared regional development priorities (JKP, 2023). It focuses on integrated destination planning, county-based value-chain development, and Blue Economy livelihoods for coastal communities, including women and youth enterprises (Ibid.). These policy directions complement community-led initiatives, in which ecotourism ventures directly contribute to local income generation, while broader reforms in marine transport connectivity, environmental risk mitigation, and disaster preparedness are intended to strengthen the long-term economic resilience of nature-based tourism along the coast.

5.2 Statistics and economic significance of coastal and marine NBT

Kenya's tourism sector demonstrated strong post-pandemic recovery, with earnings reaching KES 452.2 billion (approx. USD 3.5 billion) in 2024, representing a 20% increase from 2023 (Tourism Research Institute, 2024). **The ocean economy is estimated to contribute approx. 4% to Kenya's total GDP, with coastal tourism accounting for the largest share (approx. 65%), followed by marine tourism (approx. 28%)** (University of Nairobi Maritime Centre, 2023). Beyond earnings, coastal and marine tourism provides job opportunities to coastal communities, although the exact number of people employed in the sector remains poorly documented. The socio-economic effects are increasingly shaped by county-level coordination across Kenya's six coastal counties (JKP, 2023).

Furthermore, Marine Protected Areas (MPAs) now cover 12% of Kenya's territorial waters, generating KES 1.2 billion (approx. USD 9.2 million) annually in park fees for conservation efforts (KWS, 2024a). Kenya's Sector Plan for Blue Economy (Government of the Republic of Kenya, 2018) prioritises infrastructure upgrades, including the USD 20.12 million investment in the Shimoni Fish Port, to enhance both fisheries and tourism connectivity, alongside initiatives such as the Fisherfolk-to-Guides Programme (see Text box 9), which equips local fishers with skills to transition into ecotourism roles (Kindiki, 2025).

Diani Beach, located 30 km south of Mombasa, attracts thousands of tourists annually for snorkelling, diving safaris to Kisite-Mpunguti MPA, and kitesurfing (KAYAK, 2023). As Kenya's most developed beach resort, it generates significant revenue through water sports and luxury accommodations such as Diani Marine Villas, which specialise in diving excursions and marine weddings (Diani Marine, 2025).

5.3 Overview of coastal and marine nature-based tourism activities

Kenya's marine environment contains 250 coral species, and the fringing reefs run almost continuously along the coastline (Nairobi Convention, undated.b). The country's marine fauna includes five of the world's seven sea turtle species: green (*Chelonia mydas*), hawksbill (*Eretmochelys imbricata*), loggerhead (*Caretta caretta*), olive ridley (*Lepidochelys olivacea*), and leatherback (*Dermochelys coriacea*) turtles (Ibid.). Common marine mammals include the Indo-Pacific bottlenose (*Tursiops aduncus*) and humpback dolphins (*Sousa plumbea*), as well as the migratory humpback whale (*Megaptera novaeangliae*) (Nairobi Convention, 2021; KMMREC, 2020).

The coastline features world-class coral reefs in marine parks such as Watamu and Kisite-Mpunguti (see Text box 10), which support over 250 fish species and attract international divers (KWS, 2025). Seasonal whale migrations (July–October) along the Kenyan coast have positioned the country as an emerging whale-watching destination, complementing established dolphin encounters near Shimoni (Kambu Campers, 2024). Cultural heritage is also a significant tourist attraction, with United Nations Educational, Scientific and Cultural Organisation (UNESCO) World Heritage Sites such as Lamu Old Town offering dhow-building workshops and Swahili culinary experiences that blend seamlessly with beach tourism. Sustainability initiatives include a nationwide plastic ban and the Eco-Rating Certification Scheme (see Text box 11), adopted by 65% of coastal hotels to promote resource efficiency and reduce environmental footprints (Ecotourism Kenya, 2024).

Text box 10: Kisite-Mpunguti Marine Protected Area (MPA): A gold standard for conservation

Sources: WWF-Kenya, undated; KWS, 2021

Kisite-Mpunguti, awarded the Gold-level Blue Park Award in 2021, exemplifies integrated marine management. The BIOPAMA (Biodiversity and Protected Areas Management) programme (2020–2022), funded by the European Union (EU), trained 66 community members in ecological monitoring and established benefit-sharing guidelines. The Wasini Women's Boardwalk initiative allocates 40% of ecotourism revenue to local households to fund education and healthcare. This co-management approach has led to a 30% increase in coral cover since 2020 and to the elimination of dolphin poaching since 2022. **The MPA generates approx. USD 1.6 million annually from tourism and USD 39,000 from sustainable fisheries, far exceeding management costs of USD 190,000.**

Text box 11: Kenya's Eco-Rating Certification Scheme

Sources: Karanja, 2016

Kenya's Eco-Rating Certification Scheme has been in operation since 2002 and provides a comprehensive framework for environmental management, socio-economic contribution, and conservation outcomes in tourism. Evidence shows that certified facilities perform significantly better on key environmental indicators, such as water and energy efficiency, waste and wastewater management, and pollution control, than non-certified facilities. However, despite these demonstrated benefits, overall uptake has remained modest relative to the size of the tourism sector, with growth constrained by limited awareness, certification costs, and a perceived long and complex application process. The absence of strong government endorsement and incentives is a key barrier to wider adoption. Therefore, while the Eco-Rating framework is effective where applied, its limited penetration, particularly in high-pressure tourism contexts, constrains its ability to address sustainability challenges at scale.

Text box 12: Sport fishing in Kenya

Source: Ndegwa & Herrera, 2011

Kenya's coastline is renowned for its sport fishing industry, with a long history of recreational angling that has contributed to its broader blue economy. The primary species targeted by fishers is the Indo-Pacific sailfish (*Istiophorus platypterus*), which is a highly prized catch. Records from sport fishing clubs in Malindi and Watamu have been a vital source of data for Kenyan Fisheries. Historical recreational fishing clubs (e.g., in Malindi and Watamu) have maintained informal records for several decades, and since the late 1980s, formal tagging and logbook data have contributed to fish stock monitoring through the African Billfish Foundation (A. Njehia, personal communication, December 8 2025). This valuable data has helped monitor catch trends and the overall sustainability of the fishery, highlighting its importance not just for tourism but also for marine science.

Over the years, the sport fishing community has increasingly adopted conservation-minded practices, shifting away from simply retaining their catches. An increasing number of anglers now engage in catch-and-release, tagging their catches and then releasing them to support conservation efforts. This approach has led to a decline in retained fish and has contributed significantly to research on the species' movement and health. The peak season for this activity runs from September through February, attracting anglers worldwide and reinforcing the sector's commitment to both economic viability and ecological stewardship.

Coastal and marine nature-based tourism (NBT) in Kenya, however, faces multiple challenges, including weak policy coordination and limited institutional capacity, which undermine regulation enforcement and contribute to habitat encroachment and unregulated fishing (Charo, 2021). Habitat degradation from illegal fishing, pollution, and rapid population growth further threatens key species such as sea turtles and dolphins, thereby reducing wildlife viewing opportunities (UNODC, 2025). In addition, climate change impacts rising sea levels, warmer seas, and extreme weather, which pose serious risks to coral reefs, mangroves, and coastal infrastructure, undermining both biodiversity and tourism potential (IOM, 2023).

The next sections provide an overview of various coastal and marine NBT activities. Socio-economic data related to these activities was difficult to find but is included if available. It is important to collect data of this nature to ensure that the value of coastal and marine NBT activities are acknowledged locally and nationally to ensure inclusion in policy- and decision-making.

5.3.1 Beach and coastal nature activities

Kenya's beaches offer excellent snorkelling, scuba diving, and deep-sea fishing, with Kisite-Mpunguti and Watamu Marine Parks protecting turtles, dolphins, and over 600 fish species (Wild Wings Safaris, 2025; AfricanMecca Safaris, 2025). Diani Beach, frequently voted Africa's leading beach destination, is a hub for kitesurfing, jet-skiing, and glass-bottom boat tours. At the same time, Lamu Island offers traditional dhow cruises and historical explorations of its UNESCO-listed Lamu Old Town (Asilia, undated). Other UNESCO World Heritage sites that enrich coastal tourism include Fort Jesus in Mombasa, the Sacred Mikijikenda forests, and the archaeological site of Gedi (UNESCO, 2025a,b,c), which connect coastal and marine experiences to the region's Indian Ocean trade history, religious landscapes, and coastal cultures. Additionally, Watamu and Malindi are prime spots for reef diving and big-game fishing, particularly for marlin and sailfish between July and March (Ibid.).

While Kenya does not yet have Blue Flag-certified beaches, sustainable tourism initiatives are gaining traction. Community-led beach clean-ups, coral reef conservation programmes, and eco-certified resorts (such as those recognised by Ecotourism Kenya) promote environmental conservation (AfricanMecca Safaris, 2025). However, challenges such as sand harvesting, plastic pollution, and unregulated coastal development threaten coastal and marine ecosystems, necessitating stronger policy enforcement and ecotourism frameworks (Mbuthia et al., 2024).

Cruise-liner tourism in Kenya is regaining momentum and emerging as a strategic sector with significant potential for the country's blue economy agenda, with the Port of Mombasa serving as the sole international cruise hub (Tourism Research Institute, 2025; Nairobi Convention, 2024). As outlined in the introductory sections of the report, cruise tourism is not generally included in the definition of nature-based tourism as nature-based activities are not traditionally the main reason for tourists participating in a cruise. Information is, however, included here as cruise tourists may engage in NBT activities and there is potential, through strategic marketing and collaboration and partnerships, to grow this.

During the 2023–2024 cruise season, Mombasa experienced a strong resurgence in cruise calls, welcoming vessels such as the MSC Poesia, MS Ambience, and MV World Odyssey, each carrying thousands of tourists (KATA, 2025; Juma, 2024). It was reported that cruise arrivals increased significantly from 2,490 passengers in 2023 to 6,561 in 2024, representing a 165.5% rise (Tourism Research Institute, 2025). This growth was driven by public investments in port infrastructure, including the completion of a new cruise terminal at the Port of Mombasa in 2020, which cost approx. KES one billion (approx. USD 9.8 million), replacing older facilities and enabling the port to handle up to 2,000 passengers at a time (Construction Kenya, 2020; KATA, 2025). The Port now has the capacity to attract up to 140,000 cruise passengers annually, signalling significant growth prospects for the sector (Juma, 2024). This growth is particularly important as the sector is viewed as a high-value market, with cruise passengers often spending more per day than traditional air tourists (VOA, 2010).

5.3.2 Recreational fishing

Kenya's recreational fishing tourism sector has been an active part of the country's economy for more than five decades, contributing significantly to the country's blue economy agenda (Kimanga et al., 2022). Recreational fisheries have the potential to enhance tourism revenues and create alternative livelihoods, yet the distribution of economic benefits remains uneven (Otundo, 2024). Between 1997 and 2002, the Kenyan government invested USD 1.5 million in research, management, and infrastructure for the sector, equivalent to 5.6% of its tourism earnings, yet revenue collection represented only 11.1% of this expenditure (Kariuki, 2005). Smaller-scale operators were disproportionately burdened by licensing and access fees compared to larger, better-capitalised companies, reinforcing inequalities in the industry (Kimanga et al., 2022). A further challenge is significant economic leakage, where much of the revenue generated is not retained within local communities but instead flows to external stakeholders (Otundo, 2024). This leakage is closely tied to the dominance of high-income ownership of tourism assets, reliance on affluent international tourists, and the frequent non-local sourcing of supplies and staff (Kimanga et al., 2022; Otundo, 2024). Structural barriers, such as limited access to finance and formal permits, further constrain coastal community members, confining them to low-wage roles and limiting their upward mobility within the sector (Kariuki, 2005; Kimanga et al., 2022).

Spearfishing is a popular activity in specific coastal areas such as Shanzu, where clear, warm waters and diverse reefs teem with game fish (Shanzu Beachfront, 2025). Furthermore, the country is a world-class destination for deep-sea sport fishing (see Text box 12), known for its outstanding opportunities for targeting billfish (*Istiophoridae*) such as the Indo-Pacific sailfish (*Istiophorus platypterus*) (AfricanMecca Safaris, 2025).

Key coastal and deep-sea fishing sites

- **Malindi and Watamu:** These towns are considered the main hubs for deep-sea fishing on the Kenyan coast. The region is famous for its billfish opportunities, with anglers often targeting Blue marlin (*Makaira nigricans*), Black marlin (*Istiompax indica*), Striped marlin (*Kajikia audax*), Sailfish (*Istiophorus platypterus*), and Yellowfin tuna (*Thunnus albacares*) (AfricanMecca Safaris, 2025).
- **Mombasa and Shimoni:** With Mombasa located on the north coast and Shimoni on the south coast, these areas are key departure points for offshore fishing. The deep waters of the Pemba Channel, particularly off Shimoni, are renowned for their high concentration of large pelagic species (FishingBooker, 2025).
- **Kilifi:** This coastal town offers both inshore and offshore fishing opportunities, with several charter companies operating from Kilifi Creek. It is also an excellent spot for jigging and fly fishing for pelagic species (AfricanMecca Safaris, 2025).

5.3.3 Scuba diving

Specific visitor numbers and revenue figures are not consistently documented centrally, the industry's economic impact is clear, with **scuba diving tourism playing a significant role in Kenya's coastal economy** and numerous MPAs serving as key destinations (Ibid.). The dive sector creates direct employment for local communities, providing jobs across a range of tourism-linked services, from dive instructors and boat operators to accommodation and hospitality staff (Nairobi Convention, 2021). The industry is seen as a sustainable source of income, which can reduce dependence on less sustainable livelihoods such as traditional fishing (De Brauwier et al., 2017).

A study of the East African Marine Ecoregion found that Kenya's dive operators are particularly vulnerable to social and political risks, including safety concerns, which have historically affected tourist arrivals (Dimopoulos et al., 2019; PADI, 2025). The sector also grapples with environmental pressures, such as coastal population growth and inadequate waste management and sewage treatment which lead to ongoing coral reef degradation (Nairobi Convention, 2021). In 1998, Kenya's coral reefs suffered 50–80% mortality from the El Niño-related coral bleaching event that affected the entire Indian Ocean (Obura, 2001). However, the period of lower tourism in the early 2000s allowed reefs to recover, and a renewed emphasis on marine conservation, led by organisations such as Local Ocean Conservation in Watamu, is helping to protect the ecosystems that are so vital to the dive industry (PADI, 2025).

Key scuba diving sites

- **Watamu National Marine Park:** Often considered the jewel in Kenya's diving crown, this protected area is celebrated for its pristine reefs, abundant marine biodiversity, and opportunities to spot sea turtles, dolphins, and seasonal whale sharks (Holidify, 2024). In 2010, Watamu Marine National Park received approximately 20,000 visitors, generating USD 240,000 in park entrance fees alone (Cowburn & Sluka, 2012).
- **Kisite-Mpunguti Marine Park:** Located on the south coast in Shimoni, is renowned as the "Home of the Dolphin" due to frequent sightings. It features stunning coral gardens and a wide variety of fish species, making it a highly-rated spot for both divers and snorkelers (KWS, 2024).
- **Mombasa Marine National Park:** Situated off the coast of the bustling city of Mombasa, this Park offers convenient access to diverse dive sites, including wreck dives and vibrant coral gardens, making it a top choice for divers of all levels (Holidify, 2024).
- **Malindi Marine National Park:** Located just north of Watamu, this Park features a fringing reef and an extensive coral reef system that supports a wide range of marine life, providing excellent opportunities for both novice and experienced divers (Thailand Liveaboard, 2024).

5.4 Challenges facing coastal and marine NBT in Kenya

- **Limited infrastructure and accessibility:** Many coastal facilities, particularly in less developed areas, lack adequate infrastructure (roads, reliable power, waste management) to support high-quality ecotourism.
- **Inadequate policy coordination and enforcement:** Uncoordinated sectoral policies and limited institutional capacity undermine regulatory enforcement, leading to habitat encroachment and unregulated fishing, which directly threaten marine NBT resources (Charo, 2021).
- **Habitat degradation:** Rapid population growth, illegal fishing practices (e.g., use of mosquito nets, dynamite fishing), and pollution contribute to habitat degradation and directly harm marine megafauna, such as sea turtles and dolphins, thereby reducing wildlife viewing opportunities (UNODC, 2025).
- **Climate change impacts:** Rising sea levels, increased sea surface temperatures, and extreme weather events pose significant threats to critical marine ecosystems such as coral reefs and mangroves, which are primary NBT attractions. This can lead to infrastructure destruction, coastal erosion, and reduced biodiversity (IOM, 2023).

5.5 Opportunities for coastal and marine NBT in Kenya

- **Exceptional marine biodiversity & unique experiences:** Kenya's coastline is home to diverse coral reefs, over 500 fish species, and critical habitats for endangered species such as sea turtles and whale sharks. This offers prime opportunities for scuba diving, snorkelling, and unique wildlife encounters, including seasonal whale migrations (July–October) and established dolphin encounters near Shimoni (KWS, 2024).
- **Robust economic growth potential & blue economy agenda:** The marine sector currently contributes KES 37 billion (approx. USD 286 million) to Kenya's GDP, with ambitious government targets to increase this to KES 150 billion (approx. USD 1.16 billion) by 2027 under the Blue Economy Strategy (Kindiki, 2025).
- **Expanding marine protected areas (MPAs) & conservation efforts:** Kenya has established and expanded its MPAs, such as Kisite-Mpunguti, which serve as crucial hubs for conservation-related tourism (e.g. diving). Efforts to involve communities in conservation, such as the Kuruwitu Conservation and Welfare Association (KCWA), have demonstrated success, with fish biomass increasing by 400% and coral recovery by 30% in protected zones (Nairobi Convention, undated).
- **Growing community-based tourism (CBT) & local empowerment:** The success of initiatives such as the Gazi women boardwalk in Gazi Bay, Kwale County, where a share of ecotourism revenues is channelled to local households, highlights the potential for empowering coastal communities through NBT. A survey study from Gazi village indicates that although only 20% of the respondents were directly involved in the ecotourism initiative, most of them reported benefiting either directly or indirectly through improved access to education and health services, support for small enterprises and enhanced entrepreneurial skills, and employment opportunities (Runya et al., 2022). Community involvement is directly associated with greater tourism benefits (Sambajee et al., 2022).
- **Strategic investment in marine infrastructure:** Significant investments, such as the USD 20.12 million Shimoni Fish Port, aim to enhance fisheries and tourism connectivity, improving access and support for coastal and marine activities and cruise tourism (Kindiki, 2025).
- **Sustainable tourism certifications & global appeal:** The widespread adoption of the Eco-Rating Certification Scheme by 109 tourism services across Kenya, including a substantial portion of coastal hotels, appeals to the growing segment of sustainability-minded tourists (Ecotourism Kenya, 2021).

Kenya's coastal and marine nature-based tourism sector is a strategically important pillar of the national tourism economy and the broader Blue Economy agenda, underpinned by exceptional biodiversity, rich cultural heritage, and growing demand for sustainable travel experiences. Evidence from marine protected areas, community-led initiatives, and specialised tourism segments such as diving, sport fishing, and cruise tourism demonstrates strong economic potential and tangible conservation and livelihood benefits where governance, investment, and community participation align. However, persistent challenges, including habitat degradation, climate change impacts, uneven benefit distribution, limited infrastructure, and weak policy coordination, continue to constrain the sector's sustainability and resilience. **Addressing these constraints will require stronger integration of conservation and tourism planning, improved enforcement and incentives, targeted infrastructure investment, and scaling of inclusive, community-based and certified sustainability models.**

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6. Madagascar



Land area
590,732km²



Total tourism numbers
0.33 million



Coastal and marine area
1,195,878km²



Total tourism contribution to GDP (10.1%)
USD 1.6 billion



Population
31,964,956



International visitor spending (74.4%)
USD 683 million



Protected area size (marine) (1.32%)
15,757km²



Domestic visitor spending (25.6%)
USD 234.8 million



Total travel & tourism jobs
0.83 million

Sources: UNEP-WCMC, 2025, UNWTO, 2025, World Bank, 2024, WTTC, 2025

6.1 Introduction

Madagascar is the world's fourth-largest island and hosts exceptional coastal and marine natural capital, forming a strategic pillar for sustainable tourism development. With more than 5,600 km of coastline and an Exclusive Economic Zone (EEZ) of 1.14 million km², Madagascar is **among the most marine-resource-rich countries in the Western Indian Ocean** (WWF, 2021). Its coastal and marine ecosystems include approx. 390,853 hectares of mangroves, approx. 2,000 km² of coral reefs, seagrass meadows stretching along 1,400 km of shoreline, and productive estuarine systems (WWF, 2021; Nairobi Convention, 2025). These environments support millions of coastal livelihoods and sustain globally significant biodiversity, including sharks, rays, sea turtles, dugongs (*Trichechus dugon*), and seasonal humpback whales (*Megaptera novaeangliae*).

Madagascar has 22 marine protected areas covering 1.38 million hectares, which safeguard habitats such as the Nosy Ve-Androka Marine Park and the Ambodivahibe Marine Reserve (Nairobi Convention, 2011).

Tourism is a cornerstone of Madagascar's economy, generating significant revenues and contributing approx. 10.1% to Gross Domestic Product (GDP), while supporting thousands of jobs across the hospitality and services sectors (Nairobi Convention, 2011; WTTC, 2025). **The potential of the country's vast coastal and marine resources is, however, not fully realised** due to weak governance, fragmented initiatives, and inequitable management, which limit the benefits captured by local communities (WWF, 2021). To address these challenges, the government, with support from World Wide Fund For Nature (WWF), is advancing Marine Spatial Planning (MSP) as part of its Blue Economy agenda. This initiative seeks to balance conservation, sustainable resource use, and inclusive growth, ensuring that tourism and other maritime sectors contribute more effectively to both economic development and biodiversity protection (WWF, undated).

6.2 Statistics and economic significance of coastal and marine NBT

In 2023, the country recorded approx. 220,000 international arrivals, generating USD 1.6 billion or 10.1% of GDP, with the sector supporting 830,000 jobs (5.3% of national employment) (WTTC, 2025; UNWTO, 2025). **The economy relies heavily on foreign visitors, with international tourists contributing USD 683 million (74.4% of receipts)** versus USD 234.8 million from domestic tourism, with leisure making up 92.7% of total spending (WTTC, 2025). Coastal and marine destinations dominate these flows, with Nosy Be alone attracting up to 60% of Madagascar's dive tourists, supported by its whale shark aggregations, coral reefs, and yacht tourism (World Bank, 2025).

A nationwide review found that visits to Madagascar's Marine Protected Areas (MPAs) generated approx. USD 6–8 million annually in entrance fees and associated spending, representing up to 40% of operating budgets for some sites (Cooke et al., 2022). Community-level research indicates that even small conserved coastal sites can provide 10–30% of household income through ecotourism-linked employment and services (Rodríguez et al., 2024). However, vulnerability remains high: the COVID-19 pandemic led to revenue losses of over 90% in some MPAs, exposing over-reliance on tourism and underscoring the need to diversify income streams (Ollier et al., 2023).

A World Bank (2025) study of Nosy Be showed that **coastal and marine tourism supports both formal and informal livelihoods**, with ripple effects on retail and fisheries. In regions such as Anakao and Sainte-Marie, ecotourism contributes to improved household welfare by stabilising incomes, especially during lean fishing seasons (Tsimangataka et al., 2023). Meanwhile, the valorisation of marine wildlife, such as whale watching, turtle nesting, and coral diving, translates biodiversity into tangible conservation and livelihood benefits (Carpenter & Andreone, 2023). A study by Ziegler et al. (2021) showed that marine megafauna tourism continues to expand, with **whale shark tourism alone in Nosy Be valued at USD 1.5 million for the three-month 2019 whale shark season**, and participants spending almost double that of general tourists.

The next sections provide an overview of the main coastal and marine nature-based tourism (NBT) activities. Data on the socio-economic impacts of these activities was largely not available. This data is, however, important in terms of ensuring that the value of coastal and marine NBT activities is captured and included in policy- and decision-making.

6.3 Overview of coastal and marine nature-based tourism activities

Madagascar's coastal and marine ecosystems are rich in biodiversity, featuring coral reefs, seagrass meadows, and mangroves that attract species such as humpback whales, sea turtles, and a variety of reef fish, presenting significant opportunities for nature-based tourism (Harivelo et al., 2022; McKenna et al., 2020). Key tourist activities along the coast include whale-watching, particularly in eastern Madagascar during the humpback calving season, and scuba diving in destinations such as Nosy Be and Île Sainte-Marie, where vibrant coral reefs support high-end dive tourism (Nairobi Convention, 2011). Other popular activities include snorkelling, sport fishing, and exploring cultural heritage sites, with luxury lodges and eco-resorts enhancing the visitor experience (Ibid.).

Coastal and marine Nature-based Tourism (NBT) in Madagascar has dual significance: it is both an economic engine and a conservation tool. While the sector contributes to GDP, employment, and foreign exchange earnings, its sustainability depends on reducing economic leakage, strengthening infrastructure, and ensuring equitable benefit-sharing with coastal communities who are central to long-term stewardship of coastal and marine ecosystems (World Bank, 2025; Cooke et al., 2022). **The combination of the rich ecosystems and protected areas positions Madagascar as a prime destination for coastal and marine NBT**, while also providing opportunities for ecotourism ventures that directly benefit local livelihoods, as illustrated by the community-led initiatives in Masoala National Park (see Text box 13).

Madagascar's coastal and marine NBT, however, faces persistent challenges linked to limited local economic participation, weak governance, and climate vulnerability (UNDRR, undated). At the same time, limited institutional capacity and high levels of corruption constrain effective environmental management and enforcement (Harivelo et al., 2022; Scales, 2014). The country also remains highly exposed to cyclones, flooding, and coastal erosion, which damage both infrastructure and critical ecosystems such as coral reefs and mangroves, further threatening tourism and local livelihoods (UNDRR, undated).

Text box 13: Community benefits of ecotourism in Masoala National Park

Source: Ormsby & Mannle, 2006

Ecotourism in Masoala National Park (MNP), Madagascar, extends beyond forest treks to encompass its rich coastal and marine environments. It is a vital economic engine for the surrounding rural communities. Although tourism remains modest with approx. 2,000 visitors annually (approx. 3,200 visitors per year on average over the last three years (2022-2023-2024)) to Masoala National Park, its financial ripple effects are meaningful. Through the COSAP (*Comité de soutien aux Aires Protégées*) for MNP programme, 50% of park entrance fees are returned to local communities to fund development projects such as wells, school improvements, and roads; projects that directly impact daily life. In 1999, community grants funded by tourism reached up to USD 700, enabling infrastructure upgrades in areas such as Maroantsetra, a key coastal gateway to the park. Table 6 shows the current allocation breakdown.

Table 6: Allocation of a portion of DEAP (Park entrance fees) revenues to local communities

(Based on annual foreign visitor numbers per park)

Annual number of foreign visitors	Amount allocated to local communities (MGA)	Amount allocated to local communities (USD)
More than 25,000 visitors	150 million MGA	Approx. 32,400
Between 15,000 and under 25,000 visitors	100 million MGA	Approx. 21,600
Between 10,000 and under 15,000 visitors	70 million MGA	Approx. 15,120
Between 5,000 and under 10,000 visitors	45 million MGA	Approx. 9,720
Fewer than 5,000 visitors	10 million MGA	Approx. 2,160

The park's local guide association, *Association des Guides Ecotouristiques de Masoala* (AGEM), adds another dimension of value. Its members, trained in environmental education and first aid, not only ensure safe, informative treks but also act as cultural ambassadors and conservation advocates. Many guides speak multiple languages and maintain strong ties with their home villages, directing tourist spending toward local markets, fishers, porters, and small coastal businesses. A guide noted, if 1,000 tourists each spent a million Malagasy francs (MGF) (approx. USD 148), that alone could inject nearly USD 150,000 into the local economy, much of which supports livelihoods along the coast.

Despite limitations related to degraded infrastructure where the park is still trying to recover after COVID-19 and uneven fund distribution (in 2001, total COSAP funds distributed to all local communities dropped to just USD 500 that year), communities remain optimistic. Over 15% of residents identified tourism as a direct park benefit, and many called for better marketing of coastal villages and marine attractions such as coral reefs and mangrove areas as ecotourist destinations. **Ecotourism, when inclusive and locally managed, is helping to shift perceptions, transforming conservation from a foreign activity into a shared opportunity that connects both terrestrial and coastal ecosystems.**

6.3.1 Beach and coastal nature activities

Madagascar's coastline encompasses diverse beaches that play a central role in its tourism economy (World Bank, 2013). Areas such as Nosy Be and Île Sainte-Marie are recognised for their white sandy beaches, coral reefs, and marine biodiversity, which attract visitors for diving, snorkelling, and whale watching (Ibid.). Coastal regions also provide vital livelihoods for local populations through small-scale fishing and trade, demonstrating the interconnection between environmental resources and socio-economic wellbeing (Ibid.). Despite these opportunities, tourism infrastructure and accessibility remain underdeveloped, limiting the sector's contribution to national growth. Strengthening infrastructure and environmental management could improve the sustainability and competitiveness of coastal and marine tourism (Kutoane et al., 2015). Kutoane et al. (2015) further emphasise that leveraging coastal resources in a balanced manner could help Madagascar reduce its reliance on primary exports while fostering inclusive growth (Ibid.).

6.3.2 Whale watching

Madagascar is one of the Indian Ocean's premier destinations for whale watching, with humpback whales (*Megaptera novaeangliae*) migrating annually from Antarctica to breed and calve in its warm coastal waters (Cerchio et al., 2016). Key hotspots include Île Sainte-Marie, Nosy Be, and Antongil Bay, where sightings of breaching, tail-slapping, and mother-calf interactions have become central attractions (Faria et al., 2013). Île Sainte-Marie in particular has established itself as a hub for marine ecotourism, reinforced by the annual *Festival des Baleines* (see Text box 14) and community-based management supported by organisations such as Cétamada (Saisho, 2016).

Text box 14: Whale Festival in Sainte-Marie

Sources: Andriamaro, 2015; Gannon et al., 2015; Saisho, 2022

The Whale Festival has been organised annually in Sainte-Marie since 2015. The event takes place in July, coinciding with both the arrival of humpback whales and the peak tourist season. The presence of humpback whales during the tourist season provides an additional attraction for visitors and creates an opportunity for local professionals to generate income. Initially lasting one week, the Whale Festival has in recent years been held over four days. Since 2001, the event has been given different names such as "*Febis*," "*Tsolabe*," or "*Festival des Baleines*." The first two referred to a large fair, while the latter was dedicated specifically to celebrating the great marine mammals. Since 2015, the Whale Festival has gained new momentum, broadening its programme and improving communication toward both the public and tourism professionals. Although local festivities had long existed, the organisation of the Whale Festival has expanded the scale of events and attracted more outside visitors to the island.

During the Whale Festival, a variety of cultural and sporting activities take place, including whale safaris, mountain bike races, running events, beach soccer matches, concerts, and parades for the opening and closing ceremonies. The festival provides rare entertainment opportunities on the island, which draws significant attention from the local population. While some activities require fees that are not easily affordable for many Sainte-Marie residents (such as whale safaris and concerts), other events remain free and open to everyone. As a result, many residents come to watch the parades, sporting competitions, and listen to the concerts without entering the paid areas. The whale safari is a central feature of the festival, with participants boarding boats either from the town centre, where the Cétamada association is based, or from partner hotels. To raise awareness about the protection of large cetaceans, screenings of films and documentaries are organised for both tourists and residents, particularly young people, at a large community hall in the town centre.

During the 2008 season, across five key sites (Antongil Bay, Sainte-Marie, Nosy Be, Anakao, and Cap Sainte-Marie), tourism generated approx. USD 1.83 million, supporting small-scale operators, guides, and hospitality services (Faria et al., 2013). Additionally, approx. 3,137 visited Sainte-Marie for whale tourism in 2014, of which 50% of tourists were from France, 40% from Réunion and the remaining 10% from China, Italy, South Africa and other countries (Gannon et al., 2015). Whale tourism in Ste. Marie generated approx. Euro 277,000 (approx. USD 367,000) in 2014 (Ibid.).

6.3.3 Scuba diving and snorkelling

The north-western Island of Nosy Be is considered the epicentre, attracting nearly 60% of the country's dive tourists (World Bank, 2025). The surrounding reefs, part of the Western Indian Ocean biodiversity hotspot, host more than 300 coral species and 1,300 fish species, including seasonal aggregations of whale sharks (*Rhincodon typus*) and manta rays (*Mobula spp.*) (Obura, 2020). Diving circuits often combine reef exploration with encounters of migratory species such as humpback whales (*Megaptera novaeangliae*) between July and September, making the area one of the global destinations where multiple megafauna species can be observed in a single trip (Cooke et al., 2022).

Beyond Nosy Be, southern and eastern destinations such as Anakao, Nosy Hara, and Île Sainte-Marie also contribute to Madagascar's diving reputation. These sites are characterised by pristine coral gardens, seagrass beds, and channels supporting dolphins, turtles, and reef sharks, offering diverse diving experiences (Rodríguez et al., 2024). **The sector's economic importance is considerable, with scuba diving tourism directly supporting local communities through employment as dive guides, boat operators, and hospitality staff, while also generating revenue streams for marine protected area management** (World Bank, 2025). At the same time, **pressures from climate change and habitat degradation necessitate improved governance and sustainable practices to safeguard reefs and ensure diving continues to underpin both conservation and economic growth** (Ollier et al., 2023).

6.3.4 Recreational fishing

The country's extensive and biodiverse coastline provides a rich setting for ecotourism ventures, where tourists can engage in fishing experiences designed as NBT activities that are not only recreational but also support local livelihoods and conservation efforts (World Bank, 2022). This form of NBT is particularly prominent among the Vezo people, a semi-nomadic community residing along the southwest coast who are widely known as the 'sea nomads' due to their deep-rooted relationship with the ocean (Ghayati, 2023). The Vezo's traditional fishing practices, which include the use of outrigger canoes and free-diving techniques, have become a focal point of these organised tourist experiences.

Beyond simple recreation, these NBT fishing activities are often framed as a form of community-led marine stewardship (see Text box 15). Faced with increasing pressure from commercial trawlers and overfishing, Vezo communities, in partnership with conservation NGOs, have pioneered local initiatives to protect their marine resources (Ghayanti, 2023). A notable example is the establishment of Locally Managed Marine Areas (LMMAs), where communities collectively agree to restrict fishing in certain zones for specific periods. These reserves have demonstrated remarkable success, leading to significant increases in fish and octopus populations, which in turn boost local income and enhance the overall tourist experience (Benbow et al., 2014).

Text box 15: Vezo community-led marine stewardship

Source: Cripps & Gardner, 2016

The Vezo people of southwest Madagascar have pioneered a community-led conservation model centred on *dina* (customary laws) which prohibit destructive fishing practices such as coral mining and seabed trawling in critical habitats such as coral gardens and seagrass beds. This framework integrates indigenous ecological knowledge with modern marine science through NBT-guided activities such as ethno-ecological guiding, where Vezo fishers lead snorkelling, kayaking, and fishing tours framed within NBT, interpreting marine biodiversity using traditional navigation skills and local ecological wisdom, such as predicting fish migrations based on lunar cycles and coastal currents.

A revenue-sharing system directs 60% of ecotourism fees to community development funds, financing reef monitoring equipment, supplementary livelihoods (e.g., seaweed farming), and community health initiatives. Ecological assessments document a 34% reduction in illegal fishing within managed zones and a 180% income increase for participating families, attributed to longer octopus closure durations (13–16 weeks) and larger protected areas (approx. 70 ha) that boost post-harvest catches. Scaling this model requires streamlined government permits for community tourism enterprises and targeted African Development Bank (AfDB) funding for village-owned equipment, such as reef-survey gear and low-impact pirogues, to enhance monitoring and capacity.

6.3.5 Cruise tourism

In 2024, cruise arrivals accounted for approx. 54,000 visitors, contributing to a total of over 300,000 tourist arrivals, a sign of recovery and renewed momentum post-pandemic (Carinah, 2025). Infrastructure investments, particularly the expansion of the Ehoala port in Tolagnaro to accommodate up to five cruise ships in 2025, showcase the country's commitment to enhancing its maritime accessibility and appeal to international liners (Ibid.). Market projections suggest Madagascar's cruise sector, valued at approx. USD 0.91 million in 2024, is expected to grow at over 8% annually through 2029, underpinned by the island's unparalleled natural biodiversity and cultural heritage (Statista, 2025). This combination of increasing arrivals, infrastructure development, and economic forecasting positions Madagascar as one of the most promising emerging destinations for luxury and expedition cruises in the Indian Ocean region. As outlined in the introductory sections of the report, cruise tourism is not generally included in the definition of nature-based tourism as nature-based activities are not traditionally the main reason for tourists participating in a cruise. Information is, however, included here as cruise tourists may engage in NBT activities and there is potential, through strategic marketing and collaboration and partnerships, to grow this.

6.4 Challenges facing coastal and marine NBT in Madagascar

- **Limited local economic participation:** Despite living closest to coastal and marine assets, many communities in Madagascar gain minimal financial returns from tourism activities. Employment opportunities are often seasonal or low-paying, while ownership of lodges, tour companies, and diving operations is concentrated among outside investors (UNDRR, undated). This leaves local households with little stake in the sector's growth and limits the potential for tourism to drive inclusive development.
- **Environmental and governance pressures:** Unsustainable fishing practices threaten marine tourism assets; over 65,000 sharks are caught annually despite protective legislation. Weak enforcement allows coral mining and mangrove deforestation, degrading snorkelling sites. Tourism revenue distribution remains inequitable, with local communities receiving under 20% of earnings in Nosy Be. Training programmes for skippers and guides reach only 55% of coastal residents, limiting livelihood diversification (Rakotoson, 2006).
- **Climate vulnerability:** Coastal and marine NBT faces existential risks, sea-level rise and coral bleaching could degrade 40% of prime dive sites by 2040 (Percy, 2021). Marine Protected Areas such as Sahamalaza use radar surveillance to mitigate illegal fishing but lack climate-adaptation funding.
- **Inadequate tourism infrastructure and limited accessibility:** A number of areas have limited or inadequate tourism infrastructure which limits the potential of these areas. Accessibility can also be difficult and/or expensive for tourists, which limits growth of the sector and limits the opportunity to diversify tourism products and services.

6.5 Opportunities for coastal and marine NBT in Madagascar

- **Biodiversity-led tourism development:** Madagascar draws on its rich marine and terrestrial life, with whales, dolphins, dugongs, sharks, and turtles forming the basis for premium wildlife experiences (Adventure Life, undated). The country's 22 protected areas present strong ecotourism potential, especially Masoala National Park, where rainforest and coral reef environments create a unique combined attraction (Ibid.).
- **Regional integration:** The 2025 Africa Coastal Marine Tourism Trade Market positions Madagascar to strengthen tourism linkages with Mozambique and Tanzania, fostering greater regional cooperation and joint promotion of coastal and marine

experiences (Voyages Afriq, 2025). Additionally, leveraging the African Continental Free Trade Area (AfCFTA) would reduce barriers for tourism-focused Small- and Medium-sized Enterprises (SMEs) seeking cross-border investment (Ibid.).

- **Community-led conservation models:** Locally Managed Marine Areas (LMMAs) demonstrate high impact; for example, Vezo-guided snorkelling tours retain 60–80% of revenue within communities (Rakotoson, 2006). Seasonal events such as the sardine run offer opportunities to train fishers as baitball snorkelling guides, potentially doubling incomes from current levels. Entrepreneurial support for women-led seaside homestays and artisan cooperatives could further enhance inclusive growth (Ibid.).
- Madagascar's opportunity to combine coastal and marine NBT activities with other NBT activities involving endemic species, such as lemurs, would support the diversification of NBT products and services and extend visitor stays, which would also extend value chains and local multipliers to benefit more local communities, as well as the government.

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7. Mauritius



Land area
2,040km²



Total tourism numbers (2022)
1.4 million



Coastal and marine area
1,926,625km²



Total tourism contribution to GDP (7.4%)
USD 2.8 billion



Population
1,259,509



International visitor spending (76.8%)
USD 2.1 billion



Protected area size (marine) (0%)
45km²



Domestic visitor spending (23.2%)
USD 177.3 million



Total travel & tourism jobs
75,100

Sources: UNEP-WCMC, 2025, UNWTO, 2025, World Bank, 2024, WTTC, 2024

7.1 Introduction

The Republic of Mauritius has a total land area of 2,040 km², and a 1,926,625 km² coastal and marine area (UNEP-WCMC, 2025). **The country has 18 Marine Protected Areas (MPAs) covering 45 km² and established by the Rodrigues Regional Assembly Act and Mauritius's Fisheries and Marine Resources regulations** (Leckraz, 2021). These MPAs are categorised into marine reserves, marine parks, and fishing reserves, which provide coastal and marine tourism opportunities where visitors can experience scenic coastal and marine biodiversity, including coral reefs, fish, and turtles. Île aux Aigrettes is an example of Mauritius's coastal and marine nature-based tourism, showcasing conservation-led ecotourism (Mauritian Wildlife Foundation, 2023), see Text box 16. **Mauritius plans to expand its marine protected area coverage from 2% to 10% of its Economic Exclusive Zone (EEZ), which will not only enhance marine biodiversity conservation but also contribute to the growth of coastal and marine tourism, generating economic and social benefits** (Magellan, 2025; Akiso, 2024).

Apart from MPAs, **the private tourism sector in Mauritius is considerably involved in coastal and marine NBT**. Their contributions go beyond visitor services and include support for conservation and community engagement (M. Malen, personal communication, October 24, 2025). For example, hotel groups have marine centres that blend ecotourism with marine conservation and community involvement through various opportunities, such as educational programmes and direct and indirect employment opportunities (Ibid.). Attitude Hotel Group is an example of a private sector company promoting coastal and marine NBT, conservation and community engagement through its hotels and marine centres (see Text box 17).

Economically, tourism is a significant driver, contributing an average of 7.5% to Foreign Direct Investment (FDI) inflows between 2010 and 2022, particularly in real estate, accommodation, and food services, with 2022 FDI figures surpassing pre-pandemic peaks (UNWTO, 2023). Mauritius's strategic location in the Indian Ocean and thriving investment environment, supported by the Property Development Scheme and Invest Hotel Scheme, positions it as a regional hub for tourism FDI, with a 6% growth in 2022 (Ibid.).

7.2 Statistics and economic significance of coastal and marine NBT

Nature-based tourism, including various forms of ecotourism, such as coastal and marine tourism, and some forms of adventure tourism, is crucial for Mauritius' socioeconomic development (Mishra, 2023), capitalising on its rich biodiversity and 150 km of coral reefs (UNEP-WCMC, 2025). **Tourism is a vital pillar of Mauritius's economy, contributing approx. 7.4% to Gross Domestic Product (GDP)** and generating 75,100 jobs, with **76.8% of tourism activity driven by leisure travel** (WTTC, 2024). In 2023, international visitor spending reached USD 2.1 billion, while domestic spending contributed USD 177.3 million, underscoring the sector's economic importance (Ibid.). The tourism sector's resilience is evident in its recovery from a 14.6% GDP contraction in 2020 due to the COVID-19 pandemic, with tourist arrivals rebounding to approx. 88% of pre-pandemic levels by 2023 (WTTC, 2024; World Bank, 2024). Infrastructure investments, such as the Mauritius-Rodrigues Airport Project, supported by a USD 184 million World Bank loan and a EUR 16 million (approx. USD 17.4 million) grant, enhance tourism access while promoting sustainable practices such as green airport certification (World Bank, 2024).

The blue economy contributed over 10% to GDP in 2015, of which more than 70% came from tourism and marine leisure combined (World Bank, 2017). For instance, out of the MRU 35.1 billion (approx USD 1.14 billion) GDP, tourism and marine leisure generated MRU 20.3 billion (approx. USD 664 million) from different activities. See Table 7 on activities generating revenues for the tourism and marine leisure sector.

Table 7: Activities contributing to tourism and marine leisure revenues

Activity	Value million (MRU)	Value (approx. USD)
Leisure boat activities	4.1 billion	136 million
Hotels and restaurants	16.1 billion	525.9 million
Tourism authority	45 million	1.4 million
Beach authority	19 million	0.6 million

Source: World Bank, 2017

Text box 16: Île aux Aigrettes for nature-based tourism

Île aux Aigrettes, a 26-hectare nature reserve managed by the Mauritian Wildlife Foundation, is a cornerstone of Mauritius' coastal and marine nature-based tourism (Mauritian Wildlife Foundation, 2024). The nature reserve supports biodiversity related to coastal vegetation (Akiso, 2024). The nature reserve hosts a variety of seabirds and Aldabra Tortoises (*Aldabrachelys gigantea*) (Ibid.). **The island is open to tourists and residents through ecotourism and environmental education initiatives** as part of a sustainable conservation programme. Visitors, students, and the general public are educated about the habitat restoration efforts to increase their knowledge of conserving endangered Mauritian wildlife and plants (Mauritian Wildlife Foundation, 2020). Guided eco-tours (90–120 minutes, costing USD 20) have attracted 21,145 visitors (generating revenue of USD 422,900) to Ile aux Aigrettes since the project began, and visitors have learned about the ecosystem restoration work conducted on the island (Mauritian Wildlife Foundation, 2025; Akiso, 2024). Moreover, this restoration project at the reserve provided training to 20 guides (Akiso, 2024). Sea level rise (3.5–5 mm/year) and events such as the 2020 Wakashio oil spill, which led to wildlife mortality, highlight vulnerabilities (Mohabuth, 2020) that require sustainable conservation funding. Approximately 3,000 tonnes of oil leaked in the Mauritian ocean, and the government sought support from international UN organisations to mitigate the impact of the Wakashio oil spill (IMO, 2020). This environmental crisis highlights **policy coordination and enforcement gaps**, as well as limited institutional capacities to mitigate environmental crises affecting the blue economy (UNCTAD, 2020).

Text box 17: The importance of hotel groups in linking coastal and marine NBT, local communities and marine conservation

Source: M. Malen, personal communication, October 24, 2025

The Attitude Hotel Group is a Mauritian company that links tourism with coastal and marine conservation through its Attitude Foundation. The group has marine centres, primarily the Marine Discovery Centre (MDC), and two smaller marine centres called little MDC located in family hotels. These centres aim to help guests and local communities better understand Mauritian marine ecosystems. They also focus on education, research and community engagement. Between 2022 and 2025, the MDC welcomed 9,591 guests. Visitors learn about Mauritius' coastal and marine ecosystems through these programmes, while supporting conservation projects and sharing local knowledge.

The MDC organises coastal and marine NBT activities, such as guided snorkelling, glass-bottom boat tours, mangrove kayaking, and walks along the coast, that combine leisure with learning. More than 1,200 guests participated in snorkelling, 770 visitors engaged in mangrove kayaking and approx. 680 visitors participated in glass-bottom boat tours between June 2024 and October 2025. Each activity is led by marine eco-guides, many of whom come from nearby communities and have been trained to share their knowledge of corals, fish and mangroves. The centre also employs five marine biologists who lead scientific projects on hawksbill sea turtles (*Eretmochelys imbricata*) and humpback whales (*Megaptera novaeangliae*). Guests and youth volunteers help collect data through citizen science activities, adding to long-term data on marine species and habitats in collaboration with local and regional conservation organisation partners.

The MDC's work benefits local communities in several ways. It creates jobs for marine eco-guides, researchers and beach patrollers involved in turtle monitoring and conservation, while offering training and learning opportunities for children and young people, with the latter volunteering in conservation projects. MDC welcomed 2,290 school children for the educational programme and 370 young people who volunteered for conservation projects. School visits and volunteering programmes encourage children and young people to value and protect Mauritian coastal and marine ecosystems. All these initiatives link coastal and marine conservation and community well-being, ensuring people live harmoniously with marine ecosystems. By combining tourism, science and education, the Attitude Hotel Group supports livelihoods while helping to protect coral reefs, mangroves and other marine species. **This approach shows how private hotel companies can play a meaningful role in supporting people and marine biodiversity conservation.**

Despite economic, social and conservation opportunities from coastal and marine tourism, the sector is threatened by climate change. Mauritius's primary climate change threats are sea level rise, tropical cyclones, storm surges, flash floods and coastal flooding, elevated temperatures, extreme weather events, and severe droughts (World Bank Group, 2025). These effects not only affect coastal and marine ecosystems, leading to biodiversity loss, but also pose a threat to the NBT sector. For instance, rising sea levels exacerbate coastal erosion, impacting coastal biodiversity and beach tourism by undermining the economic benefits of the island's tourism sector (Nawoor, 2024). Therefore, **investing in coastal and marine restoration projects such as coral and seagrass restoration, coral nurseries, and blue economy projects can help mitigate the impact of climate change on the tourism sector** (UNDP, 2025).

The next sections provide an overview of the main coastal and marine nature-based tourism (NBT) activities in the country. Data on the socio-economic impacts of these activities was largely not available. This data is, however, important in terms of ensuring that the value of coastal and marine NBT activities is accounted for in national accounts and, through this, also included in policy- and decision-making.

7.3 Overview of coastal and marine nature-based tourism activities

7.3.1 Beach and coastal activities

Mauritius is widely recognised as a beach-centred destination, with its coastline offering visitors a range of recreational options (Gowreesunkar et al., 2015). The 3s (sun, sea and sand) have been the main factors attracting millions of visitors to the island's beaches (Beeharry, 2020). Furthermore, beach entertainment was traditionally closely tied to local culture, represented by Sega dance, performed at night around a beach fire to the rhythm of indigenous instruments such as *ravanne* and *maravanne* (Ibid.).

Although modern tourism has diversified the activities on offer, beaches remain the island's primary attraction. According to Statistics Mauritius (2024), **93.5% of tourists surveyed cited high safety standards at beach locations as a key factor in their experience.** Common coastal leisure activities include walking, sunbathing, swimming, parafoil kite flying, and beach sports

such as volleyball and tennis, particularly prevalent in tourist regions where sandy beaches form the core of the tourism product (Beeharry et al., 2020; Defeo et al., 2009; Schaler et al., 2007). A survey conducted in 2015 indicates that **87% of tourists visit Mauritius primarily for beach-based leisure** (Gowreesunkar et al., 2015), reinforcing the significance of coastal tourism to the national economy (Brett, 2021). Moreover, coastal tourism contributed 6.5% to the total GDP in 2012 (World Bank, 2017). The beach authority generated MRU 19 million (approx. USD 0.6 million) in 2014, contributing 0.01% to the total 10% tourism and marine leisure GDP (Ibid.).

Each of the island's most visited beaches offers its unique attractions and atmosphere (Sarkar, 2025):

- **Blue Bay beach:** located in the southeast, is known for white sand, clear blue water, and is a marine park rich with coral reefs and colourful fish and turtles.
- **Belle Mare beach:** a long and wide east coast beach with calm waters. It is popular with families and holidaymakers but still offers quiet spots.
- **Flic-en-Flac:** is a west coast beach with a lagoon protected by coral reefs, ideal for swimming and snorkelling, with scenic spots to the north and south.
- **Morne Hills beach:** located in the southwest, with turquoise water and white coral sand, is a hub for windsurfing and kitesurfing. It is also known for its historical role as a refuge for formerly enslaved people.
- **Mont Choisy beach:** is the island's longest beach, stretching from Trou aux Biches to Pointe aux Canonnières on the north coast; it is popular yet rarely crowded.

Coastal tourism also, however, poses environmental threats despite its cultural and socioeconomic significance. For instance, Beeharry et al. (2020) indicated that tourism-driven coastal development threatens the coastal zone, resulting in natural habitat disturbance, biodiversity loss, air and noise pollution, debris and beach erosion. The high number of visitors to the Mauritian coast during peak tourism season in summer and during festivals leads to littering in coastal areas. Additionally, tourists and leisure operators indicated in a study that beach erosion, which is associated with trampling and smell and disturbance caused by debris, are a major challenge in coastal areas (Ibid.).

7.3.2 Snorkelling

Mauritius has long been a snorkelling destination as it is surrounded by diverse coral and shallow reefs. Visitors can snorkel in the sea along the coast, especially in lagoons that surround offshore islands and reefs (Mlilo, 2019). A study from 2007 estimated that **approx. 255,000 leisure tourists were engaged in snorkelling activities in Mauritius in 2004** (Gössling et al., 2007). Despite snorkelling being a common coastal and marine NBT among tourists, it is still largely undocumented in official records, explaining the lack of updated data. There is a need to collect data regularly on snorkelling as a coastal and marine NBT activity through visitor surveys and operator records, to assess its socio-economic importance. This will help quantify snorkelling economic values, visitors' participation and support policies on sustainable coastal and marine NBT.

Key snorkelling activity sites are (World Leisure Holidays, 2025; Mlilo, 2019):

- **Blue Bay Marine Park:** The park is the island's most popular snorkelling location. It is well-known for its diverse marine life and productive coral gardens. The vivid colours of the coral reefs offer clear visibility, with more than 50 coral species found in the park. Parrotfish, clownfish, and even the occasional turtle are among the species visitors might anticipate seeing.
- **Flic-en-Flac:** Situated in the west of Mauritius, this popular beach is a favourite for snorkelling because of its sizable lagoon and calm waters. A remarkable variety of fish, such as butterflyfish (*Chaetodon*), trumpetfish (*Aulostomus*), spot white-spotted boxfish (*Ostracion meleagris*), the amazing moorish idols (*Zanclus cornutus*), and blue-barred parrotfish (*Scarus ghobban*), may be found in the coral reefs at Flic-en-Flac. Even spinner dolphins (*Stenella longirostris*) may be spotted by tourists.
- **Iles aux cerfs:** Visitors can spot some of Mauritius' spectacular coral and marine species, including blue-stripe snappers (*Lutjanus kasmira*), angel fish (*Pterophyllum scalare*), and blacktip groupers (*Epinephelus fasciatus*).

7.3.3 Recreational fishing

Recreational fishing is an active coastal and marine tourism activity in Mauritius, with international large game fishing competitions held annually (Houbert, 2009). Mauritius hosts several regular sport fishing competitions (Pepperell et al., 2017). These competitions include:

- The International Offshore Billfish Tournament is held annually by Le Morne Anglers Club. It is the largest recreational fishing club with 350 members and hosts multiple competitions annually.
- Grand Baie Yacht Club tournament, a popular one-day competition that usually attracts approx. 40 boats, of which approx. 80% are private and 20% charter. During these tournaments, if marlins (see species below) weigh less than 136 kg, they are usually released; otherwise, they are rarely released.

Recreational fishery's primary capture includes sailfish (*Istiophorus platypterus*), striped marlin (*Tetrapturus audax*), black marlin (*Makaira indica*), blue marlin (*Makaira nigricans*), and yellowfin tuna (*Thunnus albacares*), bigeye tuna (*Thunnus obesus*) and albacore tuna (*Thunnus alalunga*) (Pepperell et al., 2017). Moreover, sport fishers also catch other species such as sharks, dolphins (*Coryphaena hippurus*) and skipjacks (*Katsuwonus pelamis*) (Jehangeer, 2004). The peak months for marlin and yellowfin tuna are February through March, while the general pelagic sport fishing season is from October to April (Pepperell et al., 2017). The busiest months are December through February, while the slowest months are June through August. Every year, sport fishermen fish for 200–300 days (Ibid.). However, these species are depleting due to overfishing, unsustainable recreational fishing and illegal fishing. **The blue economy is facing challenges** due to illegal fishing and competition between recreational fishing and small-scale lagoon fishing (CFFA, 2023). Additionally, the recreational fishing industry is threatened by climate change, resulting in coastal erosion that impacts marine biodiversity and habitat.

A survey by the Ministry of Fisheries showed that approx. 23,400 people are involved in recreational fishing in Mauritius' lagoon, and approx. 1,000 are boat owners (Jehangeer, 2004). This data is outdated and no newer data was found. It is likely, therefore, that these numbers are larger now.

The sport fishery produces approx. 350 tonnes of pelagic fish annually for the local market, including sharks, swordfish, and marlin (Houbert, 2009). Ornamental reef fish are also subject to small-scale export production. Two operators are authorised to capture up to 6,500 fish and invertebrate specimens annually for export from different species (Jehangeer, 2004). On the other hand, there are reportedly 40–50 active sport fishing charter boats, with some companies running four or five boats each (Pepperell et al., 2017). It was estimated that between 50 and 60 private sport fishing vessels were involved in Indian Ocean Tuna Commission species fishing (Ibid.). Charter operators are allowed to sell fish, and all sport fishing vessels must have a license from the Tourist Authority. As of 2017, sport fishing charter boats primarily operate from the following landing sites (Pepperell et al., 2017):

- **Grand Baie:** A vast bay in the island's northeastern region where numerous boats can dock on moorings. However, only a small percentage were outfitted as sport fishing boats. The primary charter companies in this region are Le Performant, Horizon, and Sportfisher (five boats).
- **Black River:** Two leading charter companies and one recreational club operate in Black River, including La Carangue Centre de Pêche; J.P. Henry Charters, which has three large modern vessels berthed at La Balise Marina in the Black River estuary. Le Morne Anglers Club is the largest club associated with sport fishing on the island and is situated near the jetty of La Carangue.
- **Trou d'eau douce:** Royal Big Game Fishing is the leading charter company on the island's eastern side and mainly serves overseas customers. It has three well-equipped, large sport fishing boats with experienced skippers and crew.

7.3.4 Cruise tourism

Cruise tourism contributes significantly to socioeconomic development in Mauritius through revenue generation, job creation, and infrastructure development. Mauritius recently started to profit from the lucrative cruise ship market (Brett, 2021). Globally, cruise ships carried approx. 32 million passengers in 2019, a 40% growth over the previous ten years (Ibid.). Approximately 14.24 million cruise ship visitors come from North America, and 32% of cruise ship trips now occur in the Caribbean (Brett, 2021). Mauritius welcomed 27 cruise ships with a combined passenger capacity of 26,000 during the 2010–2011 fiscal year following the completion of a certified cruise ship jetty in 2010 (Bakker, 2013). Significant growth in this area of the tourism industry continued. Annual statistics for 2024 indicated that 49 cruise ships arrived in the country and carried 83,459 cruise travellers, including 25,107 excursionists, 28,960 tourists, 28,966 crew members and 426 Mauritian residents (Statistics Mauritius, 2025).

As outlined in the introductory sections of the report, cruise tourism is not generally included in the definition of nature-based tourism as nature-based activities are not traditionally the main reason for tourists participating in a cruise. Information is, however, included here as cruise tourists may engage in NBT activities and there is potential, through strategic marketing and collaboration and partnerships, to grow this.

7.3.5 Whale and dolphin watching

Cetacean tourism in Mauritius has experienced strong growth since 2000 (Saisho, 2022). Whale watching started in 1998 as a small, relatively marginal activity and experienced a rapid growth in the early 2000s (Gannon & Sandron, 2014; O'Connor et al., 2009). **By 2008, 25 operators were offering whale watching trips, attracting 21,000 visitors and generating over USD 2.6 million in the same year** (Ibid.). Thirty-five people were employed across 25 operators, meaning that most of the whale watching tourism businesses were run by a single individual (Gannon & Sandron, 2014; O'Connor et al., 2009). When conditions are favourable, many operators also focus on dolphin watching. The main target species are the spinner dolphin (*Stenella longirostris*) and the Indo-Pacific bottlenose dolphin (*Tursiops aduncus*) (O'Connor et al., 2009). Both species are coastal, relying heavily on the bay and surrounding reef habitats (Webster, 2012). The majority of tourism operators are based in Tamarin Bay on Mauritius' southwest coast, a site recognised as an important area for the daily activities of these dolphin species (Gannon & Sandron, 2014; Webster, 2012; O'Connor et al., 2009). However, data on tourism activities associated with dolphins in Mauritius is limited due to a lack of documentation and data collection on the socio-economic importance of dolphin watching.

In Mauritius, cetacean watching prices vary depending on the type of experience offered by operators. Based on advertised prices from tour operators, visitors pay on average USD 65 for dolphin watching and swimming and USD 85 for whale watching (Mauritius Attractions, undated; Mauritius Dolphins, undated). European tourists are the main participants in cetacean activities, and prices are generally set in euros, which are not affordable for most Mauritian residents (Saisho, 2022). Consequently, marketing and promotional efforts are directed exclusively towards international tourists (Ibid.). While this strategy has ensured steady income from overseas markets, it also makes **the sector heavily dependent on international arrivals**. This promotional strategy and the related cetacean activity prices limit opportunities for local people to participate in cetacean tourism. It also limits socioeconomic benefits for locals, as employment opportunities are limited due to the high privatisation of the tourism activities by individuals.

7.3.6 Scuba diving

Mauritius continues to grow in popularity as a scuba diving destination, where maintaining competitiveness is vital to sustaining tourist arrivals and economic contributions (Naidoo et al., 2013). The Mauritius Scuba Diving Association (MSDA) reported in 2024 that Mauritius has **over 30 registered diving centres**, including Professional Association of Diving Instructors (PADI) and *Confédération Mondiale des Activités Subaquatiques* (CMAS), which ensure a high-quality and safe experience for residents and visitors (Makoondlall-Chadee et al., 2024).

Activities associated with diving generate significant income, benefiting dive operators and other sectors such as transportation, food and beverage services and hotels (Expatriation Maurice, 2024). A veteran dive instructor with two decades of experience on the island estimated that approx. 10% of all tourists visit Mauritius primarily to dive (Gössling et al., 2007). His figure was based on the number of licences issued by the MDSA, of which most dive centres in Mauritius are members. **Dive centres receive approx. 50,000 dive tourists annually**, with approx. 1,500 tourists per dive centre (Ibid.). These statistics largely corroborate those of the Ministry of Tourism in 2003, stating that Mauritius received approx. 70,000 dive tourists annually. At an average dive cost of Euro 30 (approx. USD 22) (including considerably less expensive double dives), **diving might have generated at least Euro 16 million (approx. USD 11.76 million) for the Mauritius economy directly, or 2.5% of total tourism-related income** (Gössling et al., 2007). However, these estimates include only the direct economic benefits of the European share of foreign visitors who engage in diving activities (Ibid.). The indirect and induced economic impacts would be extensive.

Mauritius has over 100 dive sites, all filled with tropical fish species and coral reefs (SSI Diving, undated). Key scuba diving sites in Mauritius include (Bluewater Travel, undated):

- **Coin de Mire:** This dive site may be the greatest in Mauritius. Excellent visibility when diving into walls and wrecks. Marlin and other large pelagics may also be seen here. The Djabeda wreck dive, which is entirely covered in gorgeous pink soft coral, is the main attraction with several reef fish, octopuses, stonefish (*Synanceia*), lionfish (*Pterois*), and scorpionfish (*Scorpaenidae*). Dolphins, stingrays (*Myliobatoidei*), and barracudas (*Sphyræna*) are among the other species that may be found in this site.
- **Trou-aux-Biches and Grand Baie** are the ideal starting points for most dive expeditions. The best macro critter diving is found near Trou-aux-Biches. Schools of little striped eel catfish (*Plotosus lineatus*), various species of peacock mantis shrimp (*Odontodactylus scyllarus*), and moray eels (*Muraenidae*) can be found in these sites.
- **The shark pit:** This site is better suited for experienced divers due to its strong currents and rough waters. It is common to see silvertip sharks (*Carcharhinus albimarginatus*), grey reef sharks (*Carcharhinus amblyrhynchos*), and bull sharks (*Carcharhinus leucas*).
- **Belle Mare:** The island's east side offers the best diving. It is more appropriate for experienced divers and is typically done through drift diving. Sharks and pelagics are the big attractions here.

7.4 Challenges facing coastal and marine NBT in Mauritius

- **Environmental pressures and wildlife disturbance:** Coastal and marine tourism in Mauritius has several environmental challenges, including natural habitat disturbance and loss of biodiversity, beach erosion, damage to corals and coral reefs and effects of debris (Beeharry et al., 2020).
- **Policy, institutional, and governance challenges:** Mauritius faces gaps in policy coordination, institutional capacity, and enforcement that affect the sustainable management of its coastal and marine resources and related tourism (UNCTAD, 2020; Bueger & Walker, 2020). The 2020 MV *Wakashio* oil spill highlighted weaknesses in preparedness, crisis response, and adoption of international maritime safety standards (UN Mauritius, 2020), which impact public trust and the tourism brand.
- **Pollution pressures:** Untreated wastewater, nutrient runoff, and plastic pollution threaten Mauritius's coastal and marine tourism assets. Poorly managed sewage outflows degrade bathing water quality and coral health, while plastic waste affects the aesthetic value of beaches. The MV *Wakashio* spill in 2020 illustrated how acute pollution events can devastate lagoons, reefs, and public perception of the island as a pristine destination. Additionally, plastic pollution harms marine life and the visitor experience, threatening Mauritius's ecotourism reputation (Cummings, 2024).
- **Fishing-related issues:** Overfishing, destructive fishing techniques, fishing in lagoons and illegal fishing related to recreational fishing deplete fish stocks near marine protected areas, reducing marine biodiversity and tourism appeal; and fisheries management conflicts undermine sustainability (Wabnitz et al., 2023; CFFA, 2023).
- **Climate change vulnerability:** Mauritius's coasts are increasingly at risk from sea-level rise, stronger cyclones, marine heatwaves, and coral bleaching, all of which threaten ecosystems and tourism infrastructure (World Bank Group, 2025). Shoreline erosion has recently accelerated, damaging beaches, hotels, and access roads. At the same time, coral reef loss reduces the attractiveness of snorkelling and diving destinations.
- **Lack of data:** Lack of documentation and collection of socio-economic data related to coastal and marine NBT activities results in a lack of awareness and understanding of the value of these activities and their important contribution to local and national economies.

7.5 Opportunities for coastal and marine NBT in Mauritius

- **Economic potential:** The blue economy is rapidly expanding, with coastal and marine tourism contributing 10–15% of GDP and projected to grow 3.5% annually, targeting 26% of the blue economy by 2030 (Magellan, 2025; Capmad, 2024). New increased interest in the blue economy and its growth could support required investment in necessary infrastructure, legislation, etc.
- **Diverse marine biodiversity:** Mauritian marine biodiversity, such as diverse fish species and coral reefs, supports the NBT industry because it allows tourists to engage in coastal and marine NBT activities such as diving, snorkelling and cetacean watching.
- **Well-developed infrastructure:** Mauritius has well-developed infrastructure, including an extensive 2,772 km road network, seaports and airports that facilitate tourists' movements (UNWTO, 2023). Additionally, the infrastructure investments in modernising and transforming Port Louis into a sustainable port and airports support the tourism industry (UN Mauritius, 2025).
- **Investment in marine ecosystem restoration:** Mauritius invests in marine ecosystem restoration, including coral and seagrass restoration, coral nurseries, and blue carbon projects, generating new funding streams and alternative livelihoods (Akiso, 2024; UNDP, 2025), while also improving ecosystems for future ecotourism activities.

- **Tourism revenue contribution to conservation:** Tourism revenues can fund conservation projects and environmental education, with tourist participation in activities such as tree planting and wildlife monitoring, raising awareness and conserving biodiversity (Mauritian Wildlife Foundation, 2024).
- **Marine protected area expansion:** Mauritius is committed to increasing marine protected areas from 2% to 10% of its EEZ by 2025, enhancing biodiversity, fisheries, tourism opportunities, and local employment (Magellan, 2025; Akiso, 2024).

Coastal and marine ecosystems are key drivers of coastal and marine NBT in Mauritius and play an important role in contributing to the island's socio-economic development. Coastal and marine NBT activities include beach tourism, snorkelling, scuba diving, whale and dolphin watching, cruise tourism and recreational fishing, amongst others. However, **the sector is threatened** by challenges such as climate change vulnerability, pollution, disturbance to marine biodiversity, and regulatory challenges. Additionally, some NBT activities are undocumented, leading to a lack of information on the level of engagement from tourists and their socio-economic implications. Nevertheless, Mauritius has many opportunities to unlock and boost its coastal and marine NBT due to its diverse coastal and marine biodiversity, well-developed infrastructure, established MPAs and other investment opportunities in tourism.

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8. Mozambique



Land area
231,988km²



Total tourism numbers
0.49 million



Coastal and marine area
12,213km²



Total tourism contribution to GDP (5.1%)
USD 1.2 billion



Population
34,631,766



International visitor spending (29.7%)
USD 327.3 million



Protected area size (marine) (2.16%)
12,213km²



Domestic visitor spending (70.3%)
USD 775.4 million



Total travel & tourism jobs
1.55 million

Sources: UNEP-WCMC, 2025, UNWTO, 2025, World Bank, 2024, WTTC, 2024

8.1 Introduction

Mozambique has a 2,700 km-long coastline that supports approx. 30% of its population (UNWTO, 2023). The coastline, **one of the longest and most ecologically significant coastlines in Africa** (Ibid.), **is rich in biodiversity and is home to extensive coral reefs, mangroves, seagrass meadows, and estuarine systems, which sustain both local livelihoods and offer a unique tourism offering** (Pereira et al., 2014; Foyet, 2021). The network of Marine Protected Areas (MPAs) in the country comprises seven conservation areas: two national parks, three reserves, one total protection zone, and one environmental protection area (Pereira et al., 2021). The Inhaca and Portuguese Island Reserves represent the first MPAs in Mozambique (Ibid.). MPAs in Mozambique are managed by government institutions such as Mozambique's National Administration of Conservation Areas

(ANAC), local communities through LMMAs and international institutions (Pereira et al., 2014). The government signed a co-management agreement, implemented through a public-private partnership (PPP) with African Parks, to oversee the management and conservation of Mozambique's oldest MPA (African Parks, 2025). Text box 18 highlights the importance of PPPs in supporting Bazaruto Archipelago National Park's management, community well-being and coastal and marine NBT tourism.

The country's coastal and marine environments have recorded over 6,000 species (Froese & Pauly, 2019; UNEP, 2019). The IUCN reported that at least 1,976 species occurring in Mozambique's marine waters are on the Red List of threatened species, of which 139 species are categorised as Vulnerable or above (Jones et al., 2021). A total of 301 marine species, of which 242 are corals, are listed under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) (UNEP, 2019; Jones et al., 2021). These rich coastal and marine ecosystems, combined with the country's extensive network of protected areas, position Mozambique as a notable destination for coastal and marine nature-based tourism (NBT). The diversity of species and habitats not only supports conservation priorities but also creates opportunities for ecotourism, diving, sport fishing, and community-based tourism that can contribute meaningfully to local livelihoods and the national economy.

Text box 18: The importance of public-private partnerships for marine conservation and coastal and marine NBT

Source: African Parks, 2026 & 2025

Bazaruto Archipelago National Park, made up of 5 islands, is one of the most important MPAs along the East African coastline. Its waters host diverse marine species, including whales, sharks, sea turtles and dugong. In December 2017, ANAC entered into a 25-year co-management agreement with African Parks to strengthen the long-term protection and management of the country's oldest national marine park. Since the establishment of this PPP, the park management capacity has expanded through increased staff capacity, improved infrastructure and coordination with local maritime authorities. These changes, supported by regular patrols and monitoring, have contributed to a reduction in illegal fishing and a decrease in the rate of sea turtle and dugong mortality linked to fishing nets. This partnership has also linked conservation with community development through women's empowerment, education programmes, and employment opportunities in park operations and tourism. The partnership has also supported sustainable coastal and marine NBT. For instance, boat skippers have been trained in good tourism practices to reduce environmental impacts and the application of a code of conduct for coastal and marine NBT activities such as snorkelling, scuba diving and marine wildlife viewing. **Tourism revenues have been structured to support surrounding local communities, with 20% of annual income allocated to community projects.** These outcomes and impacts show how PPPs can positively influence MPA management and conservation practices, community involvement in marine conservation and community development, and support sustainable coastal and marine NBT.

8.2 Statistics and economic significance of coastal and marine NBT

Travel and tourism (including domestic and international) contributed approximately USD 1.2 billion (5.1%) to Mozambique's Gross Domestic Product (GDP) in 2023, supporting an estimated 0.67 million jobs (WTTC, 2024). Tourism, especially coastal and marine nature-based tourism (NBT), together with nautical and sporting activities, plays an important role in the economy of Mozambique, given the export potential and geo-strategic location of ports (MIMAIP, 2024). Mozambique's blue economy is focused on sustainable development through the utilisation of vast marine and aquatic resources (Gulamhussen, 2024). Through the 2024 - 2033 Blue Economy Strategy Mozambique promises to boost its economy, enrich livelihoods and conserve marine ecosystems (Republic of Mozambique, 2024). It is governed by multiple sectors and institutions including the Ministry of Sea, Inland Waters and Fisheries (MIMAIP) and Ministry of Economy and Finance (MEF), making it highly complex and requiring extensive coordination (World Bank, 2024).

Overall, in the country, **coastal and marine NBT contributes approx. 3.2% to the GDP and employs more than 350,000 people** (Nairobi Convention, 2022). In 2003, Mozambique had a total lodging capacity of approx. 12,500 beds, and the coastal provinces accounted for 57.5% of the total beds and 41% of room nights (Turpie & Wilson, 2011). Using these values, it was estimated that **the total direct spending along the coast was approx. USD 145 million** (Ibid.).

At a more local level, approximately 150,000 annual tourists visited the Inhambane province, out of which 50,000 visited the Tofo, Barra and Tofinho area (McLean et al., 2014). In 2024 approx. 27,818 people visited Bazaruto Archipelago National Park generating approx. USD 585,123 (African Parks, 2025). Additionally, coastal and marine NBT is a major employer in Ponta do Ouro, with monthly earnings ranging from approx. USD 150 for roles such as security guards to approx. USD 400 for roles such as barmen and cooks (Come, 2014). Despite rural women's involvement in informal activities, relatively few women are employed in Ponta do Ouro's tourism sector, with only 41% of the employees across seven major tourist lodges being women (Ibid.). These figures are, however, outdated and no newer data was found. It is important that robust, consistent data related to the socio-economic value of coastal and marine NBT is collected to inform policy and decision-making. The next sections provide an overview of the main coastal and marine NBT activities in the country.

8.3 Overview of coastal and marine nature-based tourism activities

Mozambique's rich marine biodiversity presents significant potential for developing coastal and marine NBT. Mozambique has unique estuarine systems, which feature diverse mangrove habitats and attract species such as dugongs, presenting a significant opportunity for NBT. Communities around the Bons Sinais Estuary highly value its mangroves, showing strong awareness of their ecological importance, and a huge potential for NBT (Hoguane et al., 2021). **The primary focus and main tourist activities along the coast** include recreational diving, sports fishing, spear fishing, birding, luxury island lodges and resorts, quad biking, snorkelling, visiting cultural heritage sites and swimming with dolphins and whale sharks (Turpie & Wilson, 2011).

8.3.1 Beach and coastal NBT activities

Beach and coastal NBT activities in Mozambique form the cornerstone of the country's blue tourism economy (MIMAIP, 2024). Tourism in Cabo Delgado and Inhambane, the country's two leading coastal destinations, relies heavily on beach tourism and reef-based recreational diving (Macamo, 2019). While national visitor data for coastal activities is limited, **provincial statistics from Inhambane and Vilanculos indicate that more than 60% of international visitors engage in beach-based experiences** (Gallivant Africa, 2024). Market demand for beach tourism in southern Mozambique is heavily shaped by regional travel patterns (Jury et al., 2011).

8.3.2 Cruise tourism

Tourism, particularly cruise-based tourism, is a fast-developing sector in Mozambique (ITA, 2025). Inhambane, only 808km² from the capital Maputo, boasts pristine beaches and marine-based activities, making it a standout destination for international travellers arriving via the sea (Ibid.). Mozambique received nine cruise ships carrying approx. 4,500 tourists in 2024, mainly in Maputo and mostly coming from Asian and European countries (Lusa, 2024). As Mozambique expands its port offerings and welcomes more international ships, especially after introducing visa exemptions for 29 countries, Maputo has emerged as an exciting new port of call (ITA, 2025). The cruise season in Mozambique runs from November to May. It is important to note that only certain elements of cruise tourism form a direct part of NBT, i.e. if passengers engage in beach tourism, snorkelling, fishing, etc., otherwise the linkages are indirect. Information was, however, included here as engaging cruise tourists in NBT activities has potential, through strategic marketing and collaboration and partnerships, to grow.

8.3.3 Recreational fishing

Recreational fishing is another form of NBT which contributes to Mozambique's economy. The sector comprises ski boats, shore anglers, deep sea fishing, spear fishing, game fishing safaris, and night fishing excursions (Come, 2014). Mozambique offers a diverse range of game fish such as giant trevally (*caranx ignobilis*), tuna (*thunnus thynnus*), wahoo (*acanthocybium solandri*), dorado (*coryphaena hippurus*), queenfish (*scomberoides commersonianus*), jobfish (*apron virescens*), and many more (FAO, 2023). See Text box 19 for more information on sport and recreational fishing in Maputo National Park.

In accordance with Mozambique's marine regulations, all marine fishing, including recreational or sport fishing activities in Mozambique waters, requires a valid fishing licence (Kyle, 2025). These licences can be purchased from the designated local Maritime Offices. In 2017, there were 6,221 licences for sport or recreational fishing (Raes et al., 2021). The marine fishing licence fees depend on the type of gear used; they range from approx. USD 7 to USD 1,800 (MIMAIP, 2024).

Text box 19: Sport and recreational fishing in Maputo National Park

Source: Viegas et al., 2022

Marine recreational fishing and sport fishing represent a growing yet under-monitored aspect of tourism in Mozambique. A decade-long study (2010–2019) conducted within Maputo National Park (MNP) offers critical insights into the scale, composition, and ecological relevance of this activity. **Recreational fishing boats accounted for 94% of all recorded fishing activity in the Park.** The study found that yellowfin tuna (*thunnus albacares*) and narrow-barred Spanish mackerel (*scomberomorus commerson*) were the most frequently caught species, with the *Scombridae* family representing 72% of total catch composition. Notably, billfish (*Istiophoridae*), especially sailfish (*Istiophorus platypterus*), made up 69% of all billfish caught and were recorded throughout the year.

This study was the first in Mozambique to provide a vital foundation for integrating sport and recreational fishing into national fisheries management frameworks and Blue Economy planning. It highlights the economic potential of marine recreational fishing, while calling for stakeholder-led approaches to align tourism growth with conservation imperatives.

Recreational spearfishing in Mozambique remains a niche segment of marine tourism. Spearfishing in Mozambique is a premier adventure sport attracting both seasoned anglers and enthusiastic novices (Viegas et al., 2022). While spearfishing contributes to Mozambique's fisheries sector, its overall economic impact is not separately quantified and is likely overshadowed by the larger artisanal and industrial fishing sectors (Ibid.).

The recreational fishing sector in Mozambique is greatly affected by beach litter (Raes et al., 2021). Marine plastic pollution is a major contributor to marine ecosystem degradation and the services these ecosystems provide (Ibid.). This is not only a problem for the fishing sector, but can also impact other sectors of the economy, such as potential losses in the NBT sector or increased costs of beach clean-ups to avoid these losses (Raes et al., 2021).

8.3.4 Scuba diving and snorkelling

Mozambique benefits from its warm waters and high underwater visibility, making it one of Africa's premier diving destinations. Scuba diving tourism plays an important role in promoting conservation, generating revenue, and supporting local communities across Mozambique (Lucrezi et al., 2017). In Mozambique, the economic contribution of scuba diving tourism is particularly significant in the southern provinces (Ibid.). A 2001-02 survey of divers in southern Mozambique, between Ponta do Ouro and Cabo Santa Maria, reported approx. 115,000 annual tourist visits and between 10,000 and 13,000 visits in Ponta do Ouro and Ponta Malongane region (Pereira & Schleyer, 2005). Approximately 60-72% of the latter are estimated to be certified scuba divers, while the remaining visitors were primarily involved with fishing and camping activities (Ibid.). Some researchers have estimated the economic importance of manta rays (*Mobula birostris*) (approx. USD 10.9 million) and other megafauna to the Mozambican tourism industry, highlighting the economic incentive for their protection. See Text box 20 (Venables et al., 2016) for more information.

Text box 20: Economic importance of Manta Ray tourism in Mozambique

Source: Venables et al., 2016

Giant Oceanic Manta rays (*Mobula birostris*), globally threatened and in decline across many regions, are iconic marine species that play a vital role in attracting nature-based tourists. This study provided the first localised estimate of the economic value of manta ray tourism in Mozambique, focusing on Inhambane Province. Drawing on data from 478 tourist expenditure surveys, 15 stakeholder surveys, and annual diver numbers from coastal tour operators, the study found that **manta ray-focused tourism generates approx. USD 10.9 million in direct revenue for dive operators annually**. When including associated tourist spending, the total economic impact rises to USD 34.0 million per year. **Without manta ray tourism, the region could face annual losses ranging between USD 16.1 million and USD 25.7 million**. Both tourists and stakeholders highlighted the ecological and economic importance of manta rays, expressing strong support for greater marine protection and the establishment of MPAs along the Inhambane coast.

Key diving sites and ecosystems

- **Ponta do Ouro** features approx. 20 vibrant reef sites. The area offers rich marine biodiversity, including vulnerable indo-pacific bottlenose dolphins (*Tursiops aduncus*), bull sharks (*Carcharhinus leucas*), hammerhead sharks (*Sphyrna spp.*) and humpback whales (*Megaptera novaeangliae*). It is one of the most visited dive destinations due to consistent marine megafauna sightings (Pereira, 2003; Wognum, 2022).
- **Ponta de Malongane** is a popular destination in southern Mozambique which offers excellent snorkelling, scuba diving, beaches, fishing and turtle nesting sites.
- **Inhaca Island** offers a mix of coral gardens, sandy flats, and seagrass beds that attract manta rays (*Mobula alfredi*), and humpback whales (*Megaptera novaeangliae*), particularly from September to November. The area is valued for its biodiversity and is easily accessible from Maputo (Wognum, 2022).
- **Bazaruto Archipelago National Park** is home to iconic dive sites such as Two-Mile Reef and Marlin Pinnacle. This protected area hosts a diverse array of marine life, including dugongs (*Dugong dugon*), green turtles (*Chelonia mydas*), reef sharks (*Carcharhinus amblyrhynchos*), and sailfish (*Istiophorus platypterus*). The reefs also feature extensive coral cover and are ideal for drift and deep dives (Raes et al., 2021).
- **Tofo and Barra Reefs** (Inhambane Province) are internationally renowned for their abundance of megafauna. Divers frequently encounter manta rays year-round, while whale shark sightings peak between November and April. Humpback whales are observed during seasonal migrations, making this a flagship location for marine wildlife tourism (Pereira, 2003; Wognum, 2022).
- **Quirimbas Archipelago and Vamizi Island** (Cabo Delgado Province) provide some of Mozambique's most pristine diving experiences and unique turtle breeding sites. Sites such as Neptune's Arm showcase underwater canyons, coral-covered walls, and deep drop-offs. Marine highlights include grey reef sharks (*Carcharhinus amblyrhynchos*), Napoleon wrasse (*Cheilinus undulatus*), and mobula rays (*Mobula*). The area is particularly favoured by advanced divers for its remoteness and undisturbed settings (Wognum, 2022).

Text box 21: Dolphin tourism in Mozambique: dolphin & whale encounters in Ponta do Ouro Mozambique

Source: Gullan, A. 2025 (personal communication)

Mozambique hosts Africa's first structured wild dolphin swim programme, pioneered in the 1990s by the Dolphin Encounters Research Center (DERC) in Ponta do Ouro. Operating within the Maputo National Park World Heritage Site, DERC promotes ethical marine mammal tourism through the *Dolphin Care Code of Conduct*, which requires that dolphins initiate interactions and prohibits touching, diving down, or chasing. These guidelines, developed with leading researchers, form the basis of the country's marine mammal operator codes of conduct.

Dolphin-swim and ocean safari operators attract approx. 10,000 visitors annually, with South Africans making up the largest share, followed by tourists from France, Germany, the Netherlands, and Mozambique. **Between February 2023 and February 2025, DERC recorded 4,284 participants, contributing over USD 13,000 to the park through snorkel taxes.** Beyond direct revenues, the sector creates jobs for local skippers and guides, and supports local businesses in accommodation, restaurants, and markets. Through training workshops, DERC builds local guide capacity while educating tourists on responsible marine mammal encounters. The inclusion of community members in tours and activities fosters environmental stewardship and pride in the marine environment.

Since 1997, DERC has documented over 7,500 dolphin sightings, identifying a core population of approx. 70 resident bottlenose dolphins (*Tursiops aduncus*). **Long-term monitoring highlights the need for strict regulation of marine mammal tourism, especially as unregulated ocean safaris expand.** Importantly, measures such as one-boat policies and minimum distance rules have reduced stress on dolphins and whales. **Some of the key lessons include:** sustainable codes of conduct, robust operator training, and long-term monitoring are essential to balance tourism with conservation. Yet, challenges remain along Mozambique's coastline, as many areas lack regulation, and rapid growth of ocean safaris threatens dolphin populations. **Stronger enforcement and expansion of ethical standards beyond protected areas will be vital for safeguarding marine biodiversity while sustaining the wildlife economy.**

8.3.5 Dolphin and sea turtle tourism

In Ponta do Ouro, guided boat trips allow tourists to engage in dolphin-swimming and turtle-viewing experiences in a manner that prioritises conservation and non-intrusive practices (Come, 2014). These tours are complemented by snorkelling at Malongane Reef, a marine ecosystem that hosts turtles, rays, and tropical reef fish, offering visitors a holistic engagement with the ocean environment (Ibid.). During the winter months, between October and July whale watching is incorporated into tours. Text box 21 provides more information on dolphin tourism in Ponta do Ouro.

8.3.6 Water sports

Surfing has emerged as notable coastal and marine NBT activity in Mozambique, particularly along the southern coastline, where favourable oceanographic conditions and expansive sandy beaches provide optimal environments (Come, 2014). Three main surfing areas exist within the southern part of the country: Ponta do Ouro, Ponta Malongane and Ponta Mamoli (DNAC, 2011). Water sports such as surfing and kite-surfing are viewed as environmentally friendly activities. Ponta do Ouro is drawing large numbers of surfers from all over the world, with the majority being South Africans (Ibid.).

8.3.7 Whale watching and marine safaris

Whale watching and marine safaris represent a growing niche within Mozambique's coastal and marine NBT sector, particularly along the southern and central coastline. Between July and October, the country's warm Indian Ocean waters become a migration corridor for humpback whales as they travel from the Antarctic to calve and nurse in Mozambican waters (Rocha et al., 2020). Ponta do Ouro, Tofo Beach, Bazaruto Archipelago, Inhambane, and Vilanculos are among the best sites for marine mammal tourism (Ibid.). Shore-based surveys in Mozambique from 2021 to 2024 showed that 2022 recorded the highest average humpback whale sightings despite the fewest surveys, while 2021 and 2024 had significantly lower averages, especially in July, August, and September (IndoCet, 2024). Whale watching tourism is important in the country, generating substantial income. Text box 22 provides a snapshot of the socio-economic importance of whale watching tourism in Mozambique, though the data is more than 15 years old. It is important to collect robust, regular data to illustrate the value of whale watching tourism as well as to support policy- and decision-making.

Text box 22: Whale watching tourism in Mozambique

Source: O'Connor et al., 2009

Mozambique's whale watching industry has experienced remarkable growth since 1998, when 500 tourists generated approx. USD 150,000 in total expenditure. By 2008, this number had increased to 8,280 whale watchers, generating approx. USD 1.2 million, representing an impressive average annual growth rate of 32.4% outpacing the broader tourism sector, which saw inbound tourism receipts grow at 11.9% annually between 2000 and 2005.

Despite limited marketing, whale and dolphin watching activities have gained popularity, with most tourists learning about them only after arrival in the country. As of 2008, Mozambique had up to 21 whale watching operators, most of which were local dive centres or boutique hotels offering opportunistic and dedicated tours. Some also facilitate swim-with-dolphin experiences. In 2008, whale watching tours typically cost USD 35 for adults and USD 28 for children and support an estimated 30 full-time jobs. **As of 2013, the average daily cost of whale watching per person was USD 58 for the whale watching ticket plus USD 85 in associated expenditures for a total direct economic impact of USD 143 per person per whale watching day** (O'Malley, 2025).

Tour vessels range from sea kayaks and recreational fishing boats to motorised and dive boats. Due to Mozambique's proximity to South Africa, some South African operators also run cross-border trips, particularly in the southern region. Humpback whales are frequently seen during their migration between June and October. Key whale watching locations include Ponta do Ouro (the main hub), Bazaruto Archipelago, Quirimbas Archipelago, and Inhambane. **With its diverse marine megafauna and growing ecotourism, Mozambique's whale watching sector, if sustainably managed, holds strong potential for contributing to both local livelihoods and marine conservation.**

8.4 Challenges facing coastal and marine NBT in Mozambique

- **Weak institutional and regulatory capacity:** Mozambique has progressive environmental and fisheries laws covering sport fishing, MPAs, and coastal tourism (Siteo, 2022; Pereira et al., 2014). However, many MPAs and NBT destinations suffer from inadequate enforcement of environmental regulations and tourism standards (Pereira, 2022).
- **Limited benefit-sharing and community participation:** Community involvement in tourism remains low, with many dependent on informal fishing, which is itself under threat. Similarly, while some community-based lodges have succeeded, many tourism operations are dominated by external investors with weak linkages to local development goals (Aquino & Rallo, 2017).
- **Environmental pressures and wildlife disturbance:** Rising tourist and operator numbers are straining fragile ecosystems such as coral reefs, with sites such as Tofo, Ponta do Ouro, and Bazaruto seeing concerns over cumulative impacts, e.g. 62,000 dives in 2002 at southern reefs raised concerns about cumulative impacts (Pereira, 2003). Similarly, unethical dolphin swim activities and poorly regulated boating risk disturbing cetaceans, despite conservation guidelines promoted by ethical operators (Rocha et al., 2023).
- **Lack of consistent monitoring and certification visibility:** Monitoring of marine recreational and sport fishing is minimal, and data collection remains fragmented or underfunded (Viegas et al., 2022). Strengthening monitoring and investing in coordinated data collection are essential to ensure the sustainability and effective management of coastal and marine NBT in Mozambique.
- **Climate vulnerability and sustainability concerns:** Mozambique's coastline is highly vulnerable to sea-level rise, ocean acidification, tropical cyclones, and coral bleaching and extreme weather events, which affect both ecosystems and tourism infrastructure (Turpie & Wilson, 2011; Republic of Mozambique, 2024). Coastal and marine NBT is particularly affected by coral loss, reduced biodiversity, and infrastructure damage caused by storms such as Cyclones Idai and Kenneth in 2019.
- **Overdependence on foreign tourism markets:** High-value coastal and marine NBT activities rely heavily on international travellers from South Africa and Europe. This external market reliance exposes the industry to regional economic shocks and global travel disruptions, limiting resilience and diversification.
- **Plastic pollution and habitat degradation:** Marine plastic pollution has emerged as a major challenge, directly impacting fishery productivity, reef health, and coastal tourism aesthetics. Beaches contaminated with litter discourage high-end ecotourism (Lucrezi et al., 2017), and overlapping use of marine space by fishers and tourists can create tensions.
- **Infrastructure and access limitations:** Mozambique's coastal and marine tourism is often constrained by poor transport links, undeveloped harbours, and limited utilities in remote areas. Sites such as Quirimbas and Vamizi Island remain difficult to access, restricting market growth (Wognum, 2022; Pereira, 2003).
- **Political instability:** Mozambique's tourism sector, particularly in the north, has been significantly impacted by political instability and armed conflict, most notably the insurgency in Cabo Delgado Province. Marine protected areas and dive sites that had high-end tourism potential are now either inaccessible or avoided by tour operators due to security risks and reputational damage (Júnior & Silva, 2022).

8.5 Opportunities for coastal and marine NBT in Mozambique

- **High biodiversity and globally unique experiences:** Mozambique's coastline positions it as a world-class destination for coastal and marine NBT activities (DANSA, 2022). Regions such as the Bazaruto Archipelago, Quirimbas, and Ponta do Ouro offer pristine reef ecosystems, nesting sites for sea turtles, and the year-round presence of reef manta rays and seasonal aggregations of whale sharks and humpback whales (Pereira, 2003; Raes et al., 2021).
- **International and regional interest:** Mozambique's strategic location, bordering South Africa, Eswatini, Tanzania, and Zimbabwe enables cross-border tourism flows and integrated nature tourism circuits. Tourists visiting Kruger National Park in South Africa or Gonarezhou National Park in Zimbabwe can easily access coastal retreats in Inhambane, Bazaruto, or Maputo Bay, creating opportunities for "bush-and-beach" packages that blend wildlife safaris, cultural experiences, and marine recreation (Republic of Mozambique, 2018; Jury et al., 2011).
- **Cultural and community-based tourism integration:** Mozambique's diverse cultural heritage, including Swahili-Arab coastal influences, traditional dhow sailing, and artisanal fishing, offers rich possibilities for cultural-coastal and marine tourism. Projects integrating coastal and marine wildlife tours with village-based experiences, coastal festivals, and community-run ecolodges create inclusive models that generate local employment, especially for women and youth (Sitoe, 2022; Raes et al., 2021). Case studies from Inhambane and Inhassoro show success in linking diving and beach tourism with plastic recycling, ecoguide training, and turtle monitoring, strengthening marine stewardship and local livelihoods (Inteca et al., 2023).
- **Diversity of tourism products and services:** Mozambique offers a wide range of ecotourism products and services from high-end resorts and diving expeditions in the Bazaruto Archipelago to community-based ecotourism and low-cost coastal lodges. This diversity allows Mozambique to appeal to multiple market segments with various price ranges, catering both to international luxury tourists and regional or domestic travellers. Through the development of a variety of tourism products and services, Mozambique can increase visitor numbers, promote longer stays, and enhance resilience against market fluctuations.

Mozambique's extensive coastline, exceptional marine biodiversity, and growing network of marine protected areas position the country as one of Africa's most promising destinations for coastal and marine nature-based tourism. This sector holds immense potential to drive sustainable economic growth, support conservation goals, and enhance community livelihoods. However, **realising this potential requires addressing persistent challenges**, including weak institutional coordination, inadequate data collection, limited community participation, and mounting environmental threats from climate change and pollution. Strengthening governance, investing in infrastructure, promoting ethical and sustainable tourism practices, and ensuring equitable benefit-sharing will be essential to secure long-term sustainability. With its Blue Economy Strategy, ongoing conservation efforts and public-private partnerships, Mozambique has a unique opportunity to harness its marine natural capital for inclusive development while safeguarding its coastal ecosystems for future generations.

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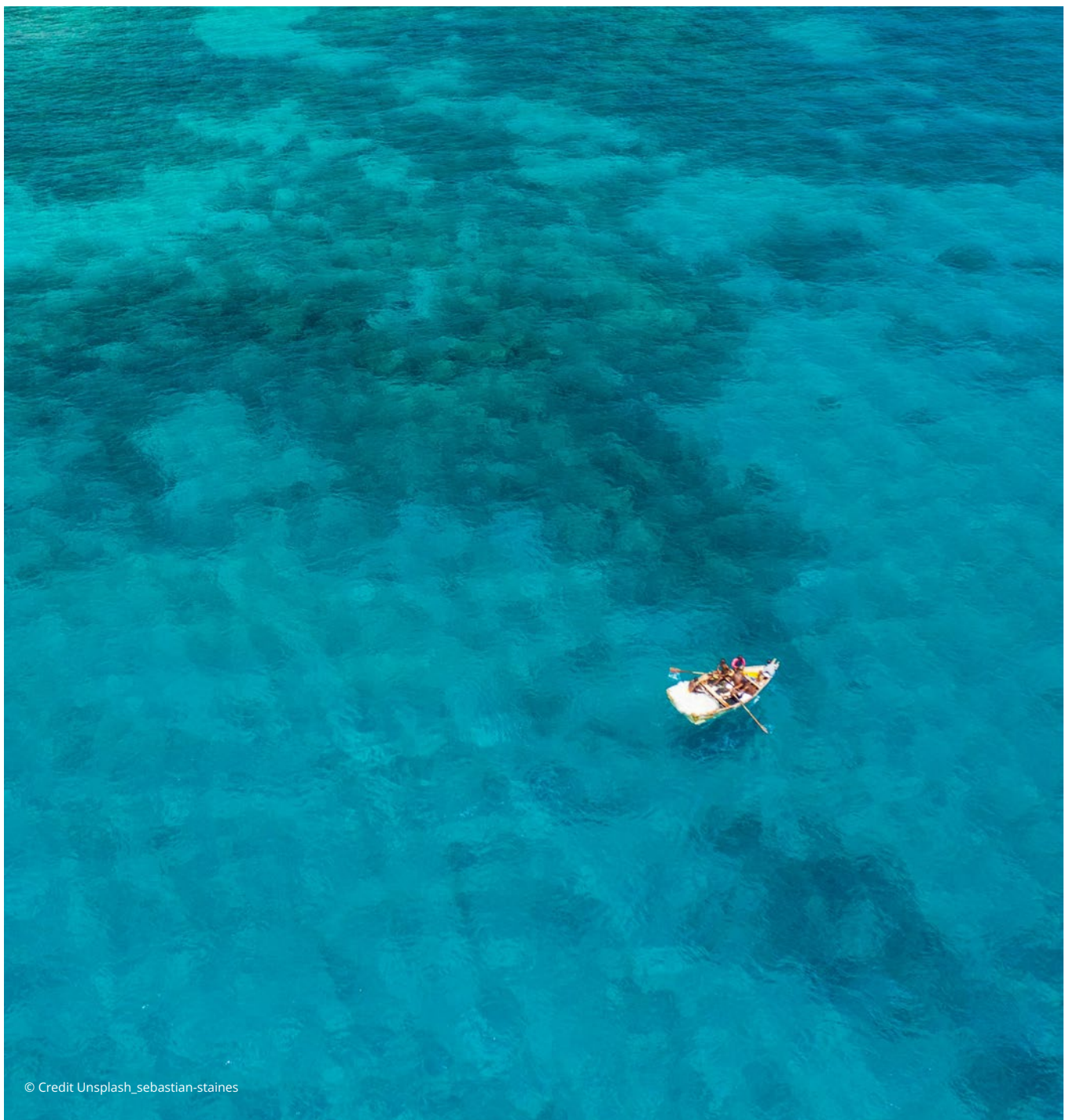
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9. Réunion



Land area
2,508km²



Total tourism numbers
0.56 million



Coastal and marine area
315,366km²



Total tourism contribution to GDP (8%)
USD 2 billion



Population
882,335



International visitor spending (81.8%)
USD 261.2 million



Protected Area size (marine) (0.01%)
36km²



Domestic visitor spending (18.2%)
USD 1.2 billion



Total travel & tourism jobs
28,000

Sources: UNEP-WCMC, 2025; UNTWO, 2025a; World population review, 2025; WTTC, 2024

9.1 Introduction

Réunion is an island located in the Indian Ocean between Madagascar and Mauritius. As the outermost region of the European Union (EU), it operates under French administrative governance, reflecting a rich multicultural heritage shaped by African, Indian, and European influences (Kreol Magazine, 2024). The Island is home to approx. 0.88 million inhabitants (World Population, 2025). Its Exclusive Economic Zone (EEZ) covers over 300,000 km², though the continental shelf is narrow and mainly restricted to the west coast, where a small fringing coral reef (narrow coral reef formation that develops directly along the shoreline) occurs, significantly smaller than that of Mauritius (Le Manach et al., 2015; David & Mirault, 2006).

Réunion is renowned for its tropical climate and striking volcanic terrain shaped by its dramatic topography (UNEP-WCMC, 2010). The country is shaped by two major volcanoes: dormant *Piton des Neiges*, the Indian Ocean's highest peak, and active *Piton de la Fournaise* in the southeast (NASA Earth Observatory, 2009). Its interior features steep mountains, deep valleys, and three

cirques: Cilaos, Salazie, and Mafate, forming part of the UNESCO-listed Pitons, Cirques, and Remparts. These amphitheatres, surrounded by cliffs over 1,000 metres high, host diverse microclimates, ranging from rainforests to alpine grasslands (UNESCO, undated).

Réunion lies within one of the world's 25 recognised biodiversity hotspots (L'Horset et al., 2025; Myers et al., 2000). Its ecological variation **supports 882 indigenous plant species, with approx. 24% strictly endemic to the island** (L'Horset et al., 2025; UNESCO, undated; UICN Comité français, 2023). The majority of the population and infrastructure is concentrated along the narrow coastal strip, placing significant anthropogenic pressure on these areas, while the island's mountainous interior remains sparsely developed (Le Manach et al., 2015).

The growing demand for “authentic” cultural experiences alongside nature-based tourism (NBT) has led to questions about how Creole identity is presented to visitors (Dunne, 2024). Text box 23 explores how Réunion's colonial past and Creole culture have been selectively repackaged to align with tourist expectations, particularly in the coastal tourism context.

Text box 23: Cultural commodification amid expanding NBT in Réunion

Source: Dunne, 2024

As coastal and marine tourism in Réunion diversifies, ranging from whale watching and deep-sea fishing to snorkelling trails, questions arise about how local culture is represented alongside nature-based experiences. Dunne's (2024) thesis explored how Réunion's colonial history and Creole cultural identity are commodified within the island's tourism economy. Once dismissed as inferior by metropolitan France, Creole culture has been repackaged since the 1980s to appeal to Western tourists seeking “authentic” tropical island experiences.

However, many cultural performances and products marketed alongside NBT activities are staged or imported, rather than rooted in genuine local practices. While tourists enjoy curated spectacles along the scenic west coast, where many NBT activities are concentrated, authentic elements such as the Creole language are in decline. The disconnection between lived local realities and the cultural imagery paired with tourism highlights the **need for more inclusive and representative models of sustainable NBT that respect both ecological and cultural integrity**.

9.2 Statistics and economic significance of coastal and marine NBT

Tourism plays a growing role in Réunion's economy, with the island welcoming 556,089 visitors in 2023, an increase of 14.7% from the previous year (Observatoire Régional du Tourisme, 2024; Prinsloo & Fitchett, 2024a). Approximately four-fifths of these tourists originate from mainland France, reflecting the island's status as a European destination that offers an exotic “out-of-Europe” experience with familiar language and infrastructure (Prinsloo & Fitchett, 2024a). In 2024, tourism numbers remained the same at approx. 0.56 million international arrivals (UNTWO, 2025a). In 2023, **the tourism sector generated approx. EUR 477.9 million (approx. USD 516.5 million) in revenue** (Prinsloo & Fitchett, 2024), indicating a strong post-pandemic recovery. The sector's stability is remarkable, **supporting approx. 13,550 jobs and accounting for 4.6% of total employment on the island** (ORT, 2025).

Despite strong international arrivals and improved air traffic, hotel occupancy declined by 2% in 2023, with notable drops during the southern winter months (July–August) and in the island's southern and western regions (Rivière, 2024). This was primarily due to a reduction in overnight stays in lower-rated and unclassified accommodations, while four and five-star establishments saw an increase in occupancy (Ibid.). **Réunion's tourism sector remains relatively small compared to regional competitors**. Mauritius, for example, welcomed approx. 1.4 million tourists in 2024 (UNWTO, 2025b), indicating its larger market share and established appeal as a tourism destination. Text box 24 suggests that the **relative underdevelopment of Réunion's tourism sector is more strongly linked to internal systemic factors than to external disruptions**.

The next sections provide an overview of the main coastal and marine NBT activities in the country.

Text box 24: Endogenous causes of tourism stagnation in Réunion (1981–2015)

Source: Charles et al., 2019

A study covering the period from 1981 to 2015 examined the stagnation of international tourism to Réunion, assessing whether external shocks, such as health crises, financial downturns, and terrorism, had lasting effects. The authors found that most shocks had only temporary impacts on tourist arrivals. Instead, the **stagnation is attributed to internal structural weaknesses**, including inadequate policy coordination, limited tourism infrastructure, and heavy dependence on the French market. The study concluded that Réunion's underperformance in tourism is primarily driven by endogenous factors and called for **targeted supply-side reforms to revitalise the sector**.

Text box 25: Climatic suitability for tourism in Réunion Island

Source: Prinsloo & Fitchett, 2024b

The Holiday Climate Index (HCI) is a second-generation tourism climate index designed to evaluate the climatic suitability of destinations for leisure tourism, with tailored versions for specific contexts such as beach and urban tourism (Scott et al., 2016; Ruttty et al., 2020). It integrates thermal comfort, aesthetics (cloud cover), and physical aspects (precipitation and wind) into a composite score ranging from 0 to 100, based on tourist preferences identified through empirical studies.

The HCI was applied to Réunion Island using 30 years of data (1991–2020) to assess climatic suitability for beach and urban tourism. The analysis revealed substantial seasonal variation, with peak conditions in July–August (excellent) and the lowest scores in February, during the cyclone season. Annual trends were largely stable, with minor fluctuations from month to month.

Air conditioning was available in approximately 69% of listed accommodations, supporting the Index's assumption of indoor thermal comfort. Compared to other regional destinations, Réunion offers more favourable winter conditions, presenting a strategic opportunity to attract European and southern African tourists during their respective off-seasons. **The study highlights the importance of aligning tourism marketing with climate suitability** and recommends further research into microclimates and alternative indices.

Text box 26: Coral reef health and marine pressures in Réunion Island

Source: Bigot et al., 2000

Reef monitoring in Réunion showed a gradient from healthy to disturbed conditions across four sites. Toboggan remained resilient despite bleaching, while Planch'Alizes improved with protection. Varangue and Corne Nord had strong coral growth, with Corne Nord hosting the highest cover and thriving *Acropora* (genus of small polyp stony coral). Omnivores and herbivores dominated fish communities, but the low presence of predators and planktivores at Corne Nord suggests that fishing pressure and an imbalance may be present.

Environmental degradation is escalating due to rapid urbanisation, increased wastewater discharge, and agricultural runoff. Despite some improvements in sewage treatment since 1985, overflows and untreated industrial waste continue to pollute lagoons, especially during cyclonic rains. Eutrophication and sedimentation are exacerbating stress on coral reefs, particularly in areas where reefs are located near the shoreline.

Tourism, now Réunion's leading industry, has intensified pressure on coastal ecosystems through coral trampling, fishing, and pollution. Traditional and offshore fisheries have been undermined by resource depletion, prompting a rise in subsistence fishing driven by high unemployment. Despite regulatory efforts, overfishing and poaching continue to be widespread, contributing to the decline of reef fish stocks.

Marine conservation governance is still emerging. Although Réunion had no official marine protected areas by the late 1990s, the formation of the Association Parc Marin marked a turning point. Legal mechanisms and institutional support are still necessary, but initiatives to classify the southern and western reef zones as nature reserves hold promise for enhanced zoning, regulation, and ecosystem conservation in the future.

**Although the source of this Text box is outdated, the majority of the environmental pressures still exist*

Text box 27: Social acceptability of Réunion's Marine Protected Area (MPA)

Source: Thomassin et al., 2010

A 2006 study assessed the social acceptability of a proposed Marine Protected Area (MPA) on Réunion Island prior to its implementation. Using schoolchildren as conduits, 640 questionnaires were distributed to parents across diverse geographic and socio-economic areas. A high response rate (73%) was achieved. Findings revealed strong overall support (78%) for the MPA, especially among respondents from higher socio-professional groups, those born outside Réunion, and individuals with negative perceptions of coral reef health. Conversely, those with no opinion or opposition were typically locals from lower socio-economic backgrounds who perceived the reefs as healthy. This case highlights the **importance of integrating social science into MPA design**. It emphasises the **need for targeted awareness efforts**, particularly for local user groups less exposed to reef degradation or management plans.

Key insights include:

- Perception of ecosystem health was a major determinant of support: respondents who believed coral health was declining were more likely to support protection measures.
- Enforcement attitudes varied: user groups such as divers, fishers, and jet skiers supported high penalties for non-compliance, signalling strong heritage conservation values.
- Use vs. non-use values were used to develop a scale of support: respondents who valued long-term reef protection over personal use showed higher levels of social acceptability.
- The methodology, which doubled as an environmental education intervention, proved effective and replicable for other MPAs.

Although outdated, the study provides valuable insight into attitudes and highlights the need for regular follow-up research of this kind.

9.3 Overview of coastal and marine nature-based tourism activities

Réunion markets itself as *l'île intense* (the intense island), highlighting its green mountain landscapes, waterfalls, sunny skies, and beautiful beaches (Prinsloo & Fitchett, 2024a). A favourable climate, characterised by warm temperatures and clear skies, plays a critical role in attracting tourists to tropical coastal destinations by enabling extended beach use and outdoor recreational activities (Fitchett et al., 2020). Text box 25 applies the Holiday Climate Index (HCI) to assess climatic suitability for tourism in Réunion Island.

Tourism websites and blogs highlight a wide range of coastal and marine NBT activities in Réunion, including **diving, snorkelling, boat excursions, and water sports**, indicating a dynamic and diverse NBT sector. However, robust empirical **data on participation rates, visitor volumes, and economic contributions remain limited**. This lack of monitoring hinders the accurate assessment of tourism's socio-economic value and constrains effective and sustainable management. Given Réunion's growth potential in tourism, the absence of comprehensive data may also mask emerging environmental pressures, as discussed in Text box 26.

Réunion's commitment to conservation is demonstrated by the establishment of the Réunion National Park, which has protected 42% of the island's terrestrial area since 2007 (Le Manach et al., 2015; Réunion National Park, 2025). In addition to safeguarding biodiversity, the Park actively promotes coastal and marine NBT as a central component of sustainable development (Réunion National Park, 2025). Evidence from a 2006 public perception study (see Text box 27) indicates that the establishment of the marine protected area received strong public support, particularly among individuals concerned about reef degradation and committed to long-term conservation (Thomassin et al., 2010).

9.3.1 Beach and coastal nature activities

Réunion has approx. 30 km of sandy beaches, both white and black, concentrated mainly along its west coast, despite its 210 km coastline (La Réunion, undated). By comparison, neighbouring islands such as Mauritius and Madagascar offer more extensive sandy coastlines, contributing to their stronger positioning as beach tourism destinations (Charles et al., 2019). These beaches, often lined with Filao (*Casuarina equisetifolia*) trees and protected by a coral reef, form calm lagoons ideal for swimming, snorkelling, kayaking, and paddleboarding (La Réunion, undated).

In contrast, the island's southern and eastern volcanic shores offer dramatic settings for hiking and surfing, including trails around *Anse des Cascades* and *Cap Méchant* (Réunion National Park, 2025).

9.3.2 Recreational fishing

Recreational fishing is widely advertised through tourism platforms, such as TripAdvisor. As all operators require professional licences, catches are included under artisanal fisheries and are typically sold to local restaurants and fishmongers (Le Manach et al., 2015). Consequently, tourist catches are not reported separately (Ibid.). Several professional operators in

Réunion, primarily based in Saint-Gilles-les-Bains, offer deep-sea fishing trips, with half-day prices typically ranging from EUR 80–100 (USD 94–117) per angler and approx. EUR 50 (USD 58.50) for accompanying guests; packages often include drinks and light snacks, with discounts available for groups (Tripadvisor, 2025).

9.3.3 Scuba diving and snorkelling

Réunion Island, with its warm, clear waters and distinctive marine life, is a key diving destination in the Indian Ocean. **The island offers a variety of dive experiences, from calm lagoon dives to deep volcanic drop-offs, across at least 13 identified sites, including reef, drift, and wall dives** (PADI, undated). Most diving occurs along the west coast, though more adventurous options exist in the stronger southern and eastern currents, where divers can explore submerged lava formations (La Réunion, undated; PADI, undated). The ideal diving season is June to November, with visibility averaging 30 metres and water temperatures between 22–29°C (PADI, undated).

A notable ecotourism initiative is the underwater snorkelling trail at L'Ermitage lagoon, marked with buoys and seafloor plaques. This free, self-guided trail allows visitors to explore coral gardens safely and earned an IFRECOR award for innovation in 2013 (La Réunion, undated). While online platforms and operators indicate a thriving dive and snorkel tourism sector, **empirical research on visitor numbers, participation rates, and the segment's economic value remains absent.** This lack of data limits a complete understanding of its contribution to Réunion's economy.

9.3.4 Sport tourism

Réunion has become a prominent sports tourism destination, capitalising on its volcanic terrain and year-round tropical climate to host a wide range of outdoor events and activities. Although not directly related to coastal and marine NBT, **the Grand Raid de la Réunion (*Diagonale des Fous*) ultramarathon draws approx. 5,500 runners annually, 30% of whom are international, and generates an estimated EUR 10 million (approx. USD 11.71 million) in local revenue** through transport, accommodation, coaching, and related services (Bertrand & Hamilton, 2024). It is likely that a number of these runners also engage in some form of coastal and marine NBT during their trip, though no data was found related to this, but would be useful to collect in future.

Other flagship events include the Mégavalanche mountain bike race, the Leu Air Festival (paragliding world championships), and the Rip Curl Pro surfing competition (Bouchet & Naria, 2025). Outside of these headline events, tourism blogs suggest the island supports year-round participation in trail running, canyoning, paragliding and hiking, with over 1,000 km of marked trails for multi-sport users, including coastal routes that link terrestrial recreation with marine landscapes (La Réunion, undated). Research suggests that **strategic sports tourism can enhance local economies while strengthening community resilience** (Jean-Pierre & Naria, 2024). Sports tourism offers international visitors the opportunity to extend their stay before or after flagship events by exploring Réunion's coastal and marine attractions. Text box 28 examines residents' attitudes towards sport tourism and sustainability on Réunion.

Text box 28: Residents' attitudes towards sport tourism and sustainability on Réunion

Source: Bouchet & Naria, 2025

This study explored how residents of Réunion perceive sport tourism and its role in the island's sustainable development. Drawing on social exchange theory, the authors developed a quantitative model to assess their attitudes toward sport tourism and the perceived positive and negative impacts on economic, social, cultural, and environmental dimensions. The findings indicate that **residents generally view sport tourism positively, particularly for its economic and cultural benefits**; however, **concerns exist regarding environmental degradation, cultural dilution, and overcrowding**. Support for sport tourism development is stronger than support for restrictions or taxation, although those with higher environmental concerns are more likely to favour regulatory measures. The study concludes that resident perceptions significantly influence support for sport tourism policy and that inclusive, context-sensitive planning is crucial for balancing growth with sustainability.

9.3.5 Whale and dolphin watching

The whale-watching industry has expanded rapidly worldwide, including on Réunion Island, where humpback whale (*Megaptera novaeangliae*) sightings during the Southern Hemisphere's winter (June–October) have increased significantly since 2007 (Condet & Dulau-Drouot, 2016; Dulau-Drouot et al., 2012; Saisho, 2022). **In 2008, an estimated 3,248 tourists participated in whale-watching excursions, generating approximately USD 460,204 in total revenue**, of which USD 94,127 was attributed to direct expenditure and USD 366,077 to indirect economic contributions (O'Connor et al., 2009). Previously focused on year-round dolphin species such as Indo-Pacific bottlenose (*Tursiops aduncus*) and spinner dolphins (*Stenella longirostris*), **the industry now identifies the island, particularly its west coast, as a key breeding site for humpback whales. This has led to a sharp rise in whale-watching and swim-with-whales tourism over the past decade** (Ceyrac et al., 2018). Humpback whale watching

trips last 3 hours, and the price per trip is approx. EUR 40 (approx. USD 45) (Andrea, 2015). No data was found on the number of tourists participating or the total value of this activity.

The World Cetacean Alliance (WCA) (2020) proposed 100 voluntary measures to support sustainable whale-watching on Réunion Island, aiming to minimise disturbance to whales, dolphins, and sea turtles while improving visitor experiences. These guidelines align with findings from a 2017–2018 study, which revealed high tourism pressure and poor compliance during swim-with-whales activities, especially near mother–calf pairs (Hoarau et al., 2020). Despite existing efforts, enforcement gaps remain. Text box 29 summarises the behavioural impacts of whale tourism on humpback whales observed during the two-year study along Réunion's west coast.

Text box 29: Impacts of whale-watching and swim-with-whales tourism on humpback whales in Réunion Island

Source: Hoarau et al., 2020

This study evaluated the impact of whale-watching and swim-with-whales tourism on humpback whales off Réunion Island during the 2017–2018 breeding season. Observations of 723 whale groups revealed high tourism pressure, with vessels present in 85% of sightings and swim-with activities in 38% of sightings. While general vessel compliance with voluntary guidelines was relatively high (85%), swim-with-whales compliance was low (33%), particularly around vulnerable mother–calf pairs. **Non-compliant encounters significantly disrupted whale behaviour**, especially during resting periods, and led to increased avoidance and safety concerns for both whales and swimmers.

The **findings suggest that current non-binding regulations are insufficient to manage the growing pressures of tourism**. The authors recommended reinforcing protections, particularly for mother–calf groups, through improved regulation, stronger enforcement, targeted education, and stakeholder involvement. Better compliance with guidelines could reduce whale disturbance and enhance visitor experiences, but managing swim-with activities sustainably remains a key challenge.

9.4 Challenges facing coastal and marine NBT in Réunion

- **Environmental degradation:** Urban runoff, untreated sewage, eutrophication, and overfishing contribute to the degradation of coral reefs and reduced reef fish diversity, threatening the long-term viability of coastal and marine NBT.
- **Overcrowding of key sites:** The most accessible and protected lagoons on the west coast can experience high visitor numbers, leading to concerns about carrying capacity and the potential for a diminished experience and environmental stress.
- **Seasonal and geographic tourism imbalances:** Tourist numbers and hotel occupancy vary sharply by season and region, with underperformance in winter and in southern/western parts of the island.
- **Lack of empirical tourism data:** Gaps in data on tourist participation, sectoral economic value, and environmental impact limit informed planning and sustainable development across all coastal and marine NBT activities.
- **Structural, governance and institutional weaknesses:** Endogenous constraints, including fragmented policy coordination, limited infrastructure, and overdependence on the French market, continue to limit tourism growth.
- **Limited marine governance and enforcement capacity:** Although marine conservation efforts have begun, institutional frameworks, such as the Association Parc Marin, remain weak in terms of legal authority and enforcement capability.

9.5 Opportunities for coastal and marine NBT in Réunion

- **Tourism as a stable economic pillar:** The sector generated EUR 477.9 million (approx. USD 516.5 million) in 2023, supports approximately 13,550 jobs, and benefits from a consistent source market of approx. 560,000 annual visitors, primarily from mainland France (Prinsloo & Fitchett, 2024). There is an opportunity to diversify source markets, including more regional tourists as well.
- **Adventure and sports NBT tourism integration:** Flagship sport events enhance the island's international visibility and contribute to destination branding, creating opportunities to attract those who may combine participation or spectating with diving, whale watching, or other coastal and marine NBT activities.
- **Diverse and growing coastal and marine NBT activities:** Coastal and marine NBT is expanding across various activities (with opportunities for further diversification), including whale watching, snorkelling, diving, and deep-sea fishing, as well as ecotourism innovations such as the IFRECOR-awarded snorkelling trail at l'Ermitage Lagoon.
- **Established marine natural reserve:** The presence of a protected and well-managed marine reserve supports healthy ecosystems, which are the foundational assets for sustainable coastal and marine NBT activities such as snorkelling and diving.
- **Unique marine biodiversity:** The Island is a key breeding ground for humpback whales and a permanent home for various dolphin species, providing a high-value, high-demand tourism product that attracts visitors from around the world.
- **Favourable climate and scenic diversity:** Réunion's tropical, year-round climate and dramatic volcanic coastline offer strategic advantages for attracting European and southern African tourists during their off-seasons.

Réunion Island presents considerable, yet largely untapped, potential for the development of sustainable coastal and marine nature-based tourism. While the sector already makes a meaningful contribution to the local economy, growth is constrained by structural weaknesses, uneven tourist distribution, environmental degradation, and a lack of empirical data. Realising this potential requires improved governance, better monitoring, and more inclusive tourism models that align ecological sustainability with cultural authenticity and economic resilience. With targeted investment and coordinated planning, Réunion can become a leading example of integrated and sustainable NBT development in the region.

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10. Seychelles



Land area
455km²



Total tourism numbers
350,701



Coastal and marine area
1,341,430km²



Total tourism contribution to GDP (8%)
USD 1.07 billion



Population
121,354



International visitor spending (93.2%)
USD 1.09 billion



Protected Area size (marine) (32%)
437,416km²



Domestic visitor spending (6.8%)
USD 79.8 million



Total travel & tourism jobs
25,300

Sources: Nairobi Convention, undated, NBS, 2025, UNEP-WCMC, 2025, World Bank, 2025, WTTC, 2023

10.1 Introduction

Seychelles is an archipelago of 115 islands in the Western Indian Ocean, 40 of which are granitic, with the remaining islands formed by coral reefs (Persaud, 2015; Payet & Agricole, 2006). The country has a coastal and marine area of 1,341,430 km² and a coastline length of 491 km (UNEP-WCMC, 2025; UNDP, 2008). **Seychelles has adopted one of the world's most ambitious marine conservation policies**, protecting 32.61% of its ocean territory, covering 437,416 km², through Marine Protected Areas (MPAs) and promoting ecotourism models that prioritise conservation alongside economic benefits (UNEP-WCMC, 2023; Commonwealth, 2021).

The country has 11 MPAs, including seven Areas of Outstanding Natural Beauty, and four Marine National Parks (IUCN, 2024). These MPAs cover about 261 km² of granitic reefs (78%), 239 km² of coral reefs (90% of the national total), 5 km² of beaches (80%), 28 km² of mangroves (92%), 17,000 km² of seagrass beds (85%), and 46,000 km² of shelf waters (89%) (Nature Conservancy, 2022).

The country is known for its marine biodiversity with 1,196 marine species, including fish species, sea turtles, coral sponges, and marine mammals such as Dugong (*Dugong dugong*) (IUCN, 2024). Seychelles has pristine coral reefs, which cover approx. 1,690 km² and support 174 coral species (ASCLME, 2012). This rich marine biodiversity supports ecosystem services by providing recreational activities, supporting Seychellois' livelihoods, protecting coastal communities and sequestering carbon (Nature Conservancy, 2022). This biodiversity hotspot has led Seychelles to depend on tourism and fisheries for economic growth (Ministry of Fisheries and Blue Economy, 2024). The archipelago's coral reefs and marine biodiversity are, however, vulnerable to climate change effects, such as ocean warming and acidification, which threaten ecological health and tourism (Sridharan, 2025).

10.2 Statistics and economic significance of coastal and marine NBT

Seychelles is among the Small Island Developing States (SIDS) that depend heavily on tourism, constituting a significant share of its economy (Sridharan, 2025). This means that **healthy marine ecosystems are crucial for the country's economic success** due to its reliance on the tourism industry for economic growth (UNECA, 2021). Before the COVID-19 pandemic, tourism was a central pillar of economic growth, accounting for 22.3% of GDP and providing jobs for more than half (52%, equivalent to 27,900 jobs) of the workforce in 2019 (WTTC, 2023). Additionally, there were approx. 380,000 tourists, more than doubling in the last 20 years (Sustainable Travel International, 2025). While Seychelles is not generally considered to be experiencing overtourism at the national level, **tourism growth has increased pressure in certain locations**, particularly in coastal and marine tourism sites. Praslin, Vallée de Mai is an example of an area that experiences tourism pressure, especially during the peak tourism season during the Christmas period and the European summer holidays (Sustainable Travel International, 2021). This pressure may result in socio-economic impacts such as resource competition, which can reduce the quality of life of Seychellois and environmental impacts, including coastal and marine ecosystem degradation (Ibid.).

The COVID-19 pandemic exposed the country's vulnerability to external shocks (Sridharan, 2025). International travel restrictions led to a significant drop in arrivals and revenues in 2020, with more than 2,300 reservations worth approx. USD 3.8 million cancelled in less than a month (Karapetyan, 2020). The Central Bank reported that tourism revenues between January and November 2020 dropped by 78% and direct contributions to GDP dropped from 22.3% in 2019 to 15.5% in 2020 (US Department of State, 2022). By the end of 2021, visitor numbers had fallen to 182,849, a decline of 71% compared to 2019. Recovery was slow but visible, as arrivals rose by 18% in December 2022 compared to the previous year, bringing total visitors in 2022 to 332,068 (NBS, 2022).

In 2022, the sector experienced a recovery with economic contributions to GDP reaching USD 1.07 billion, projected to reach USD 1.93 billion in 2023. The sector continued to employ 25,000 people and was projected to provide 28,000 jobs in 2023, highlighting its enduring role despite the crisis (WTTC, 2023). In 2024, Seychelles had 350,701 visitors, including both international and domestic (NBS, 2025). International spending accounted for 93.2% (approx. USD 1.09 billion) of all tourism expenditures, while domestic spending accounted for 6.8% (approx. USD 79.8 million) (WTTC, 2023). Coastal and marine Nature-based Tourism (NBT) is an important component of the tourism sector in Seychelles and therefore, significantly contributes to Seychelles' economy, benefiting both locals and the government.

At the same time, the rapid growth of the tourism sector creates challenges of its own. Increasing visitor numbers put pressure on fragile coastal ecosystems and limited infrastructure while competing with residents for scarce resources (Sridharan, 2025). Climate change exacerbates these risks, making monitoring and sustainable management of tourism essential to protect marine ecosystems and maintain the sector's sustainability (Ibid.). Another challenge is that the benefits of tourism are not evenly spread. Many workers are employed in low-paid and seasonal jobs, often clustered in coastal resort areas, leaving remote regions and outer islands with fewer opportunities and widening social and regional inequalities (Sridharan, 2025).

The next sections provide an overview of the main coastal and marine nature-based tourism activities in the country.

10.3 Overview of coastal and marine nature-based tourism activities

The islands of Mahé, Praslin and La Digue are the leading destinations for tourists and the primary inhabited areas of the archipelago (Republic of Seychelles Istanbul Honorary Consulate, 2025). Seychelles' coastal and marine tourism depends on its nature-based activities centred on its crystal-clear waters, coral reefs, and diverse marine biodiversity. These activities include beach tourism, scuba diving, snorkelling and eco-tours in MPAs such as Sainte Anne (see Text box 30), Curieuse (see Text box 31), and Silhouette, where tourists explore coral ecosystems and encounter species such as green turtles (*Chelonia mydas*) and whale sharks (*Rhincodon typus*) (SPGA, 2021).

Text box 30: Sainte Anne Marine National Park in Seychelles

Sources: SeyVillas, 2025; Snorkelling Report, 2025; SPGA 2025, 2024 & 2021

Sainte Anne Marine National Park (Ste. Anne MNP) is the oldest Marine Protected Area in Seychelles, established in 1973, and the **first to be created in the Indian Ocean**. Located just 5km from the main island of Mahé, the Park comprises six ecologically significant islands: Ste. Anne, Cerf, Moyenne, Ronde (Round island), Longue, and Île Cachée. The Ste. Anne MNP is managed by the Seychelles National Parks Authority (SNPA), which since its inception in 2009, has been responsible for the State-managed Protected Areas in the country. The conservation values of the Ste. Anne MNP are mainly its large nesting population of critically endangered hawksbill turtles (*Eretmochelys imbricata*) and smaller population of endangered green turtles (*Chelonia mydas*), relatively extensive algae beds and seagrass (sea turtle feeding habitat), cowtail stingray (*Pastinachus sephen*), lemon shark (*Negaprion brevirostris*) and blacktip reef shark (*Carcharhinus melanopterus*) pupping grounds, coral reefs, spotted eagle ray (*Aetobatus narinari*), and porcupine ray (*Urogymnus asperrimus*) nurseries, and its aesthetic value of unique mix of small shallow blue waters and green-clad islands.

The Park's rich marine biodiversity supports sustainable tourism activities such as snorkelling, glass-bottom boat tours, and nature walks. Visitors can watch bottlenose dolphins (*Tursiops truncatus*) on a boat cruise and experience swimming with Hawksbill Turtles. Additionally, a core value of national parks is their sustainable use for education and recreational purposes. This means that the Park resources are used sustainably to support recreational activities and educate local and foreign visitors about this sustainable use. **Ste. Anne MNP recorded approx. 20,000 foreign visitors in 2023, excluding the number of Seychellois who do not pay to visit the MNP** and engage in recreational activities, as the park does not record their visits and activities. The Park has socio-economic benefits because it provides business opportunities and generates revenue for many private tour operators and boat charter companies. Ecotourism in Ste. Anne MNP contributes to the country's economy, employment and marine conservation finance. As a result, **the Park generated a total annual revenue of Seychellois Rupees (SCR) 5.1 million (approx. USD 358,448) in 2023.**

Activities that threaten marine life, such as fishing and motorised water sports, are prohibited, underscoring the Park's commitment to ecological conservation. Challenges beyond the park management control include:

- Drift rubbish originating from the nearby landfill and from Port Victoria;
- Climate change (rising sea level and sea surface temperatures leading to coral bleaching and death, and to coastal erosion);
- Coastal development within and adjacent to the MNP causes pollution and run-off (organic, solid, sewage), contributing to eutrophication, siltation, coastal erosion, etc.

Text box 31: Curieuse Marine National Park

Sources: SPGA, 2022 & 2023

Curieuse Marine National Park was officially established on June 11, 1979. The island is the fifth largest of the granitic Seychelles islands, covering 286 hectares. Its tallest point rises to 172 meters above sea level and it is located over a kilometre from Praslin. **The Park has a vision to be a pristine natural sanctuary that promotes sustainable tourism, ecological integrity, and community well-being.** Additionally, the Park aims to build significant and mutual relationships with the surrounding communities through the 2023–2027 Curieuse Park administration. This will be achieved by involving them in decision-making procedures, offering sustainable livelihood opportunities, and encouraging a sense of responsibility and ownership over the Park's resources. The Park has iconic marine species attracting visitors and facilitating ecotourism experiences related to marine turtles, giant tortoises and coco-de-mer nuts (*Lodoicea maldivica*).

In 2018 and 2019, there were 50,507 and 42,141 visitors, respectively. But in 2020, there was a significant drop, falling to 9,808, which was caused by the COVID-19 pandemic's negative impact on international travel. A partial recovery was observed in 2021, when the number of visitors increased to 22,805. With 43,166 visitors by 2022, there had been a notable recovery. In 2023, Curieuse was the Seychelles Parks and Gardens Authority's highest-earning site, **generating SCR 14 million (approx. USD 979,490) annually.** The Park is, however, threatened by invasive species, poaching, illegal fishing, beach erosion, habitat degradation, climate change, and unsustainable tourism. Additionally, there is insufficient information being provided to visitors about the history of Curieuse, limiting their understanding and appreciation of the island's cultural significance.

10.3.1 Beach tourism

Seychelles' islands are known for their white sandy beaches and clear blue waters, which attract thousands of visitors each year (Ministry of Agriculture, Climate Change and Environment, 2025). These beaches are not only central to tourism but also form an essential part of the local ecosystem, making their sustainable management crucial. **The National Beach Monitoring Programme regularly conducts profiling of selected beaches to ensure a long-term system for sustainable use.** Mahé, the largest island, with more than 65 beaches and a size of only 27 km by 8 km, is often described as a paradise island (Atayi, 2020). Famous beaches such as Anse Lazio on Praslin and Anse Source d'Argent on La Digue are consistently ranked among the most beautiful in the world, while on Mahé, well-known sites include Anse Royale, Baie Lazare, Beau Vallon, Port Launay, and Takamaka (Tourism Seychelles, 2018).

Seychelles' beaches are important for the coastal tourism sector because they generate significant income that contributes to the country's economic development. **The country's beaches generate approx. USD 160 million of tourism expenditures, and they attract approx. 94,000 visitors annually** (Nature Conservancy, 2022). A study survey showed that foreign tourists mainly enjoyed swimming, reading, relaxing, and sunbathing at beaches such as Beau Vallon and Anse Source d'Argent, while local residents were often at beaches for business reasons (Yang et al., 2023). Seychellois who visited the beach for recreational purposes preferred swimming, relaxing, socialising, and playing beach volleyball (Ibid.). **Potential challenges in terms of beach tourism include** that at Beau Vallon, litter on the shore has been observed to increase during the day, largely due to beach users leaving waste behind (Ibid.).

10.3.2 Cruise tourism

Over the past 20 years, Seychelles has seen a significant growth in cruise tourism and has become **one of the top cruise destinations in the Indian Ocean** (UNECA, 2025). Various factors have contributed to the cruise industry's growth. These factors include: Seychelles' reputation as an exotic and luxurious destination, the global influx in demand for cruise vacations, the modernisation of cruise terminals and major port renovations to handle larger vessels while improving the entire visitor experience (Ibid.). Supportive policy frameworks, including the Seychelles Sustainable Tourism Master Plan (2022–2030), which seeks to leverage cruise tourism as a tool for regional development and economic diversification, have been implemented in line with these infrastructure improvements (Tourism Seychelles, 2023). It is important to note, however, that **cruise tourism is not always directly nature-based**, as many people join for the cruise, rather than related nature-based activities such as scuba diving, beach tourism, etc. Where these activities do take place, they are indirectly related to cruise tourism.

Cruise tourism contribution to GDP in 2024 is estimated at USD 50 million, which is expected to grow by 2033 (see Table 8). In the 2022–2023 cruise season, Seychelles welcomed 38 vessels with approx. 68,000 visitors (Joubert-Lawen, 2024). In comparison, in 2024, Seychelles received 40,185 cruise passengers across 41 port calls, with vessels that can accommodate 184 to 2,700 passengers (Tourism Seychelles, 2025). By 2033, the number is expected to reach 50,000 annually (UNECA, 2025). Furthermore, cruise tourism generates direct jobs in restaurants, tour companies, and retail shops serving tourists, while also supporting work in hospitality, logistics, transportation, and event management, with an additional 144 jobs expected to be created over the next eight years (Ibid.).

Cruise tourism is important for the Seychelles' economy as it contributes to GDP and government revenues, brings in foreign exchange, and creates jobs (UNECA, 2025). In addition, the sector encourages investment in infrastructure, supports private businesses, and can, if well managed, promote sustainable tourism, which strengthens the country's long-term economic resilience (Ibid.). The country benefits from this sector through port fees, bunkering, ship supplies, and passenger head taxes. For example, a ship carrying 2,000 passengers can generate approx. SCR 35,000 (USD 2,458) in port fees alone (Hampton & Jeyacheya, 2012).

Table 8: Economic importance and growth projection of cruise tourism in Seychelles

Indicator	2024	Growth projection in 2033
Contribution to GDP	USD 50 million	USD 78 million
Government revenue	USD 3 million	USD 4.7 million
Revenue for local businesses (spending on souvenirs, food, transport, services)	USD 10 million	USD 34 million

Source: UNECA, 2025

The rapid development of cruise tourism in the Seychelles has, however, also led to significant challenges. Ship anchors, ballast water discharge, and air pollutants are making coral reefs and marine protected areas more vulnerable to harm (UNECA, 2025). These environmental pressures not only jeopardise the ecological integrity of the islands but also threaten the long-term sustainability of tourism. Furthermore, local infrastructure may be overwhelmed by the seasonal surge of cruise passengers, particularly on the major islands of Mahé and Praslin (Ibid.). **During periods of peak tourism, public services such as waste management, transportation, and healthcare face significant pressure.** This correlates with **the invisible burden of tourism**, which is the unaccounted destination costs required to support local infrastructure and protect ecological and socio-cultural systems for locals and tourists (Epler-Wood et al., 2019). For instance, tourism generates large volumes of solid waste

that are often excluded from local budgeting, leaving local municipalities unprepared to manage the rising demand. Without proper planning, untreated waste threatens health, contaminates water sources and coastal areas and undermines resident well-being and the reputation of coastal destinations (Ibid.).

10.3.3 Recreational fisheries

Seychelles is a popular destination for recreational fishing, and both large and small, well-equipped boats are available for charter (Pepperell et al., 2017). The recreational fishing in Seychelles is practised by citizens and tourists. **It is seen as a basic right of all Seychellois citizens, which means no licence is required for recreational fishing for locals** (Nairobi Convention, 2010). However, sport fishing, being a fishing activity within the broader recreational fishing sector, is mainly practised by tourists. Foreign tourists engaging in sport fishing are required to have a sport fishing vessel licence issued by the Seychelles Fishing Authority (SFA) (Pepperell et al., 2017). This engagement in sport fishing has led to an actively growing sport fishing charter industry that operates for tourists, including those at the higher end of the international market (Ibid.). **Approximately 40 charter boats work full-time, supported by an additional 50 privately owned vessels** that can target species managed by the Indian Ocean Tuna Commission (IOTC) (Pepperell et al., 2017). On Mahé, one active sport fishing club contributes to international billfish tagging programmes, and its competitions provide the SFA with some size data related to the fish tagged (Ibid.).

Sport fishing for pelagic fish is actively promoted online, in hotels on Mahé, and on the beach at Beau Vallon (Pepperell et al., 2017). The Fisheries Act regulates sport fishing, and the Mahé Plateau Trap and Line Fishery Co-management Plan (MP Plan) imposes limits on specific sport fishing activities. Local anglers target mostly demersal species as they use the catches for consumption (SFA, 2024). Additionally, billfish are the main target species for tourists, and efforts are also made to catch other pelagic species, including dolphinfish (*Coryphaena hippurus*), wahoo (*Acanthocybium solandri*), and tuna (Pepperell et al., 2017). From 1971 to 2017, the total recorded sportfishing catch reached 4,900 tonnes, all of which was classified as unreported (Christ et al., 2020). The main ports/locations for sport fishing on Mahé are (Pepperell et al., 2017):

- **Bel Ombre Harbour:** On the northwest side of the Seychelles, Bel Ombre is a small public harbour with easy access to offshore fishing grounds. A mix of private and sport fishing boats moor in this harbour. Approximately 10 to 12 charter vessels operate from Bel Ombre; three of these are well equipped for tuna and billfish fishing, while others are more basic but still active in offering charters.
- **Eden Island Marina:** Located on the Seychelles' eastern side, Eden Island Marina is a large, modern facility that hosts many private and charter boats. The charter vessels here are generally big, modern, and well fitted for sport fishing. Some belong to companies that manage two or three boats, such as Bluewater Charters, while several others in the 50–60 foot range are privately owned and run with a full-time captain and crew.
- **Beau Vallon:** A beach resort area, adjacent to Bel Ombre. Several charter operators have permanent or temporary offices there to take bookings for charters.

The Seychelles government has recognised that the recreational fishing industry supports the tourist and fishing industries that are the foundation of the Blue Economy (Pepperell et al., 2017). **Between 20,000 and 30,000 visitors and 8,500 locals participate in recreational fishing in Seychelles annually** (Ministry of Fisheries and Blue Economy, 2022). In Seychelles, the recreational fishing industry may annually account for 1,153 jobs, or 2.2% of total employment (Ibid.). Additionally, this sector's annual expenses in 2021 were between USD 167 million to USD 196 million, and its annual income contribution ranged from USD 80 million to USD 94 million, with an **overall economic impact of USD 36 million to USD 48 million** (Ministry of Fisheries and Blue Economy, 2022). **The recreational fishing sector, however, lacks a routine for catch data collection, which creates a challenge for evidence-based resource management** (Ministry of Fisheries and Blue Economy, 2023). Seychelles needs to develop a catch assessment system that will allow tracking total catches and provide details on species caught, fishing areas, gear and boat types. This will play an important role in accurately assessing Seychelles' fish stocks and will support sustainable monitoring and evaluation (Ibid.).

10.3.4 Whale watching

Source: Morel, 2025

Whale watching in Seychelles is an important ecotourism activity that attracts visitors and contributes to income generation and employment. Whale watching contributes to job opportunities through tourist operators, dive companies, and conservation organisations. Whale migration is the major activity that attracts tourists. The country's location is within the migratory routes of whales and other large marine mammals. Key species that tourists can watch during the whale migration from June to September are the humpback whale (*Megaptera novaeangliae*), sperm whale (*Physeter macrocephalus*) and occasionally orcas or killer whale (*Orcinus orca*) and pilot whales (*Globicephala macrorhynchus*). Whale migration seasons have made ecotourism more valuable because it can, if properly managed, promote sustainable interactions with marine life. Tour companies often focus on educating tourists on whales' behaviours and the threats they may face due to pollution or climate change. Thus, **whale watching not only contributes to the tourism industry but also promotes the conservation of whale migratory species through education.** Places well-known for whale watching include Mahé, Praslin and La Digue islands.

10.3.5 Whale shark ecotourism

Source: Rowat & Engelhardt, 2007

The whale shark (*Rhincodon typus*) has become a major ecotourism attraction in Seychelles. Local Seychellois fishers have long been familiar with whale sharks, and have never hunted them for food. **Whale shark ecotourism in Seychelles is an example of a stakeholder-driven model that aligns marine conservation with tangible socio-economic benefits.** The growing visitor interest in whale sharks led to the creation of the whale shark monitoring network, which enhances data collection through public participation from various stakeholders such as dive operators, conservation organisations, government agencies and local Seychellois. These stakeholders co-developed a code of conduct for whale shark encounters. This code includes rules such as limiting the number of swimmers and prohibiting swimmers from touching the whale sharks or swimming less than 3m from the whale sharks. This stakeholder-driven process has turned the species into a valuable resource. **In 2004, approx. USD 13,260 was generated from whale shark ecotourism.** Participants paid USD 100 per person per trip, of which USD 37.5 was for boat costs and USD 62.5 for conservation project expenses. **Whale shark tourism has the potential to generate approx. USD 5 million from 15,000 visitors.** The stakeholder-driven management system continues to be important not only because it involves Seychellois in whale shark conservation, but also provides an important source of income to the local community.

10.3.6 Snorkelling and scuba diving

Seychelles' rich marine biodiversity serves as a centre of attraction for visitors interested in scuba diving and snorkelling. The marine biodiversity is significant because it hosts green sea turtles (*Chelonia mydas*), Hawksbill turtles (*Eretmochelys imbricata*), guitarfish (*Rhinobatos rhinobatos*) and giant moray eels (*Gymnothorax javanicus*) and megafauna such as whale sharks (*Rhincodon typus*) and manta rays (*Mobula birostris*), amongst others (Philipson, 2022; Trainor, 2024). **The country offers a diverse range of scuba diving sites, including wrecks, coral reefs, wall dives and granite rock formations.** Seychelles' dive sites can be found on islands such as Mahé, Praslin, l'Ilot, La Digue and South Marianne; the Ennerdale wreck; Whale Rock and the atoll Adabra (Trainor, 2024). **Seychelles' coastline also offers good conditions and opportunities for offshore snorkelling.** Visitors can explore marine ecosystems such as granite boulders, fringing reefs, seagrass beds and lagoons (Snorkelling report, undated). Places mostly visited for snorkelling include Ste Anne Marine Park, Anse Lazio, Anse Boudin and Anse Petite Cour, Anse La Réunion and Port Launay (Ibid.).

Snorkelling and scuba diving contribute to Seychelles' economy through tourism expenditures, and most of these on-reef activities happen in MPAs (Nature Conservancy, 2022). A study conducted in 2004 showed that 65% of visitors participate in snorkelling activities and 19% in scuba diving (Rowat & Engelhardt, 2007). **On-reef activities such as diving and snorkelling are estimated to generate approx. USD 51.5 million from at least 30,156 visitors** (Nature Conservancy, 2022). Importantly, **USD 17.7 million of expenditure on scuba diving and snorkelling is spent within protected areas (34% of the total)**, with the highest visits and expenditures occurring in three of the Areas of Outstanding Natural Beauty, including Alphonse, Cosmoledo and Astove Archipelago and Desroches Atoll (Ibid.). Despite their economic importance, these two marine-based tourism activities are undocumented, and there is a lack of up-to-date data on the socio-economic importance of snorkelling and scuba diving.

10.4 Challenges facing coastal and marine NBT in Seychelles

- **Coastal erosion:** Coastal erosion in popular tourism areas such as Anse Kerlan (Praslin island) and increased flood exposure undermine beach infrastructure and natural habitats (Benoit, 2021). This coastal erosion can negatively affect the coastal and marine NBT sector as damaged coastal ecosystems and infrastructure may reduce tourism attractiveness.
- **Recreational fishing and other NBT activity data gap:** There is a lack of a routine system for collecting data on recreational fishing catches, as well as related to other forms of coastal and marine NBT activities, creating a major challenge for evidence-based resource management and policy- and decision-making.
- **Low participation of Seychellois in the NBT sector and benefit-sharing inequalities:** There is a low proportion of Seychellois working in the tourism sector because most tourism jobs are held by foreigners (UNECA, 2021). Additionally, tourism benefits are not equally distributed to local communities, as they often occupy low-paying job roles (Sridharan, 2025).
- **Dependence on tourism and fishery sector:** Seychelles' heavy reliance on tourism and fisheries leaves the country exposed to external shocks, pandemics, price volatility, and natural disasters, which can dramatically reduce revenues (Benoit, 2021). Diversification is important to build resilience.
- **Pollution:** The coastal and tourism NBT sector is threatened by littering on beaches and runoff of harmful substances in the ocean from unsustainable waste management. Pollution affects marine biodiversity and coastal areas, which can impact the coastal and marine NBT in Seychelles because it can reduce the attractiveness of these coastal and marine areas.
- **Climate change:** Seychelles faces climate change impacts such as acidification and ocean warming, causing sea level rise. Both stressors threaten coral reef health, critical for snorkelling, diving, and coastal tourism (World Bank & Ministry of Environment, Energy and Climate Change of Seychelles, 2019).
- **Tourism pressure:** Seychelles has experienced a significant tourism growth within two decades, with the number of tourists doubling in 20 years. This growth is mainly due to cruise tourism, whose number of tourists tripled in less than 10 years (Sustainable Travel International, 2025). While this growth does not indicate overtourism at the national level, it has intensified pressure on coastal and marine ecosystems and infrastructure. It poses a challenge for residents because it has the risk of reducing their quality of life socially and economically as they compete with tourists over the same resources (Ibid.).

10.5 Opportunities for coastal and marine tourism NBT in Seychelles

- **Seychelles' coastal management plan:** The 2019 Coastal Management Plan outlines a systematic framework that links conservation with strategic tourism planning, including zoning and risk-based approaches (World Bank & Ministry of Environment, Energy and Climate Change of Seychelles, 2019). This encourages coastal economic development, including sustainable coastal and marine NBT.
- **Marine Protected Areas (MPAs):** Seychelles has allocated 30% of its coastal and marine areas to conservation with the creation of MPAs, which allow the country to enhance marine biodiversity conservation. MPAs host protected marine habitat and biodiversity which attract tourists interested in marine activities such as diving and snorkelling. This plays a significant role in promoting coastal and marine NBT that will contribute to the country's socio-economic development.
- **Community-led co-management initiatives:** Community-led co-management initiatives such as Locally Empowered Area Protection (LEAP) promote local stewardship of marine sites, thereby enhancing conservation outcomes and social benefits linked to tourism (Benoit, 2021). Co-management creates opportunities for local communities to benefit from coastal and marine NBT through guiding and other hospitality services. It will also ensure that tourism benefits are shared among local communities and will help to reduce socio-economic inequalities.
- **Potential coastal and marine NBT growth:** The coastal and marine NBT activities, such as cruise tourism, are projected to contribute USD 78 million to Seychelles' GDP, create 144 new jobs and contribute USD 34 million to local businesses and entrepreneurs (UNECA, 2025). This growth presents a socio-economic opportunity because it will contribute to income generation and job creation in the country. Sustainable management of this growth will be critical to long-term success.
- **Partnerships with global institutions and research coastal research centres:** Collaboration and partnerships strengthen marine pollution monitoring, data-driven tourism planning, and climate resilience strategies (Benoit, 2021; World Bank & Ministry of Environment, Energy and Climate Change of Seychelles, 2019). These partnerships can help the country to reduce pollution, protect coastal and marine ecosystems and build climate change resilience which supports sustainable coastal and marine NBT.

Coastal and marine NBT in the Seychelles is linked to the country's diverse marine ecosystems, which not only attract visitors but also sustain local livelihoods and contribute to the country's economic growth. However, the sector's sustainability is threatened by environmental pressures, including pollution, coastal erosion, and climate change effects. At the same time, there are social challenges faced in the sector. For instance, many jobs in the coastal and marine NBT sector are held by foreigners, limiting opportunities for Seychellois. Moreover, the restricted access to certain beaches and coastal areas has raised concerns about inclusion and equity in the sector. Addressing these challenges and ensuring sustainable coastal and marine NBT growth is important to build resilience and ensure sustainability of the natural resources on which the sector is dependent. There is a need to strengthen local communities' participation in the sector by expanding socio-economic opportunities and improving monitoring systems for NBT-related activities. These actions will ensure sustainable NBT tourism growth that sustains both coastal and marine ecosystem protection and supports socio-economic development.

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11. Somalia



Land area
637,992km²



Total coastal and marine area
784,502km²



Population
19 million



Total travel & tourism jobs
No data available



Total tourism numbers
No data available



Total tourism contribution to GDP (8%)
No data available



International visitor spending
No data available



Domestic visitor spending
No data available

Sources: World Bank, 2024; UNEP-WCMC, 2025; WTTC

11.1 Introduction

Somalia's 3,333 km coastline is the longest of any country on mainland Africa, representing an untapped socio-economic asset that has the potential to reshape its global tourism narrative beyond conventional perceptions (NEC of Somalia, 2024). **The Federal Government of Somalia's National Development Plan (NDP-9) 2020–2024 identified tourism as a key driver for economic diversification and job creation, with a particular focus on transforming the country's extensive coastal and marine resources into sustainable economic pillars** (Federal Republic of Somalia, 2022). Building on this, the recently launched National Transformation Plan (NTP) 2025–2029 replaces the NDP and reinforces these priorities while placing **greater emphasis on the role of the private sector in driving growth, investment, and long-term sustainability** (FRS, 2025).

Decades of civil war and inter-clan conflict since 1991 severely disrupted governance and halted most biodiversity management initiatives, particularly in the southern regions (CBD, undated). Somalia's coastal and marine habitats, including mangroves, coral reefs, seagrasses, salt marshes, and cold-water corals, currently lie mostly outside any protected areas, highlighting both conservation gaps and future opportunities (Ocean+habitats, undated). With its pristine, undeveloped beaches, vibrant coral reefs, and rich marine biodiversity (see Text box 32), Somalia offers significant potential for coastal and marine nature-based tourism (NBT). Yet, the absence of essential tourism infrastructure such as paved roads, reliable power, and marinas, combined

Text box 32: Somalia's marine wildlife

Source: Nairobi Convention, undated

Somalia's coastal and marine environment supports one of the most productive ecosystems in the Indian Ocean, known as the Somali Current Large Marine Ecosystem. Its habitats include mangrove swamps, estuaries, rocky shores, wetlands, coral reefs and extensive seagrass beds. Coral communities are particularly rich, with 27 genera and 63 species identified, while mangroves cover approx. 1,000 hectares, mainly in the Juba-Shabelle estuary and southern creeks. Seagrass beds, dominated by sickle-leaved cymodocea (*Thalassodendron ciliatum*), are concentrated along the southern coast.

Somalia's waters are home to abundant small cetaceans such as common (*Delphinus delphis*), spinner (*Stenella longirostris*), spotted (*Stenella attenuata*), humpback (*Sousa plumbea*) and bottlenose dolphins (*Tursiops truncatus*), alongside several whale and shark species. Marine turtle diversity is also high, with loggerhead (*Caretta caretta*), hawksbill (*Eretmochelys imbricata*), olive ridley (*Lepidochelys olivacea*), leatherback (*Dermochelys coriacea*) and green turtles (*Chelonia mydas*) present. Among these, the green turtle (*Chelonia mydas*) nests along the eastern coastline. In addition, ten endemic seabird species occur in Somalia, further highlighting its ecological importance. These ecosystems underpin fisheries and coastal livelihoods, yet remain underutilised and vulnerable. **Strengthening conservation, sustainable management and ecotourism offers pathways to both safeguard biodiversity and enhance socio-economic benefits for coastal communities.**

with weak policy frameworks, limited enforcement and instability in the country, continues to constrain accessibility, regulation, and visitor experience (NEC of Somalia, 2024). Despite ongoing instability, the country remains strategically positioned to attract an increasing number of international visitors, aligning with national goals for a robust blue economy (Ibid.).

11.2 Statistics and economic significance of coastal and marine NBT

Measuring the economic significance of coastal and marine nature-based tourism (NBT) in Somalia is challenging due to **a significant lack of reliable, up-to-date data**. Decades of political instability, conflict, and a weak institutional framework have hindered the systematic collection and analysis of economic statistics related to the country's blue economy, which includes fisheries, shipping, and tourism (Ali, 2023; RDI Africa, 2025). While Somalia possesses the longest coastline in mainland Africa and a wealth of marine biodiversity, these resources remain largely unquantified in economic terms. The absence of a comprehensive national framework for assessing and regulating offshore activities, combined with persistent issues such as illegal, unreported, and unregulated (IUU) fishing by foreign vessels, means that the actual economic value of these assets, particularly NBT, is not accurately captured (SDRB, 2025; ITA, 2024). **This data deficit not only makes it difficult to understand the current economic landscape but also severely limits the ability of the government and potential investors to make informed decisions for conservation and sustainable development.**

The next sections provide an overview of the main coastal and marine nature-based tourism (NBT) activities in the country.

11.3 Overview of coastal and marine nature-based tourism activities

Somalia's extensive and largely undeveloped marine environment presents a significant opportunity for economic growth through coastal and marine NBT (NEC of Somalia, 2024). This vast marine portfolio features exceptionally rich biodiversity, providing unique potential for future ecotourism development.

While comprehensive data on Marine Protected Areas (MPAs) current operational status and exact coverage is still being consolidated, at least four MPAs have been proposed, including sites such as Saad ad-Dim Island (see Text box 33) and Maydh Island (BIOPAMA RIS, 2021; PERSGA, undated). These designated areas, once fully established and managed, hold potential as coastal and marine NBT attractions, allowing visitors to experience relatively unexplored marine environments through activities such as diving and snorkelling (Carbone & Accordi, 2000).

The fisheries sector, intrinsically linked to coastal and marine NBT, is a significant component of Somalia's blue economy. Both sectors depend on healthy marine ecosystems. Fisheries ensure food security and livelihoods, while coastal and marine NBT adds value through activities such as sport fishing, seafood tourism, and cultural experiences in fishing communities (RDI Africa, 2025). This illustrates how **coastal and marine NBT can build on established fisheries-based livelihoods to foster diversification within the blue economy** (Ibid.).

The country's untapped coastal and marine NBT potential and diverse ecosystems, including opportunities for whale and dolphin watching, represent concrete avenues for job creation and small-scale trade in coastal communities (RDI Africa, 2025; Schleyer,

Text box 33: Socio-economic potential of Saad ad-Dim Island for local communities

Sources: BIOPAMA RIS, 2021; NEC of Somalia, 2024; MARCOD, 2025; PERSGA, undated

Saad ad-Din Island, off the Puntland coast, is a key ecological site with notable socio-economic value, offering potential as a designated MPA and a focal point for future nature-based tourism development. Recognised for its rich marine biodiversity, including coral reefs, diverse fish populations, and potential for marine megafauna sightings, the Island is set to become a hub for conservation efforts. While direct, large-scale NBT revenue is yet to materialise, the protection and restoration of ecosystems around Saad ad-Dim will ensure healthier fish stocks. If effectively managed for ecotourism, such as diving, snorkelling, and marine safaris, Saad ad-Din Island could attract niche markets and generate per-visitor revenues comparable to other well-managed Indian Ocean Island destinations.

Local communities residing near Saad ad-Dim Island are increasingly being engaged in discussions regarding its protection, fostering a growing awareness of the long-term benefits of marine conservation. This engagement aims to involve potentially hundreds of local inhabitants in stewardship activities, from monitoring marine health to participating in clean-up campaigns, providing foundational skills for future tourism roles. Initiatives supported by international partners such as the Global Environment Facility (GEF) are exploring ways to empower these communities through capacity building and support for sustainable livelihoods tied to the marine environment. **Building local skills, fostering ecotourism entrepreneurship, and ensuring fair benefit-sharing are essential** to transform Saad ad-Din Island's ecological value into lasting socio-economic gains and advance Somalia's blue economy agenda.

1999). As security improves and infrastructure develops, these opportunities can be scaled in a way that benefits both biodiversity conservation and local livelihoods (RDI Africa, 2025).

Somalia's exceptionally rich coastal and marine biodiversity offers significant, yet largely untapped, potential for NBT (MARCOD, 2025). Its waters are home to a diverse array of marine life, including various species of fish, corals, seagrass meadows, and important migratory routes for marine megafauna such as whales and dolphins (Nairobi Convention, undated; CMS, 2023). This ecological diversity provides a strong foundation for a range of potential and emerging coastal and marine NBT activities.

11.3.1 Beach and coastal nature activities

Somalia possesses extensive stretches of undeveloped coastline, offering immense potential for beach-based tourism (Somalia Ministry of Information, Culture & Tourism, 2024). However, **this potential is currently challenged** by significant marine litter pollution, which degrades the visitor experience and threatens coastal ecosystems (see Text box 34). While the sector is still in its infancy, the emphasis is on developing sustainable practices that prioritise ecosystem health and local community benefit (RDI Africa, 2025). A critical first step is addressing this pollution to improve basic safety and cleanliness. Unlike more established destinations with formal eco-certifications such as Blue Flag, Somalia is currently focused on these fundamental development issues, particularly in areas such as Mogadishu and Berbera, where initial tourism activities are beginning to emerge (Ibid.).

Somalia adopted its National Blue Economy Strategy in 2023, which runs until 2027, providing a framework for the sustainable use of coastal and marine resources (NEC Somalia, 2024). The focus on coastal development within the strategy includes the enhancement of coastal areas for recreational use (NEC Somalia, 2024). As the sector grows, understanding visitor preferences and implementing basic environmental management will be crucial for tailored marketing and well-managed coastal and marine tourism. The long-term vision aims to attract international tourists by 2030, which will necessitate high standards of service, safety, and environmental stewardship (Somalia Ministry of Information, Culture & Tourism, 2024).

Text box 34: Marine litter on the Somali coast

Source: Hassan et al., 2024

Marine litter, overwhelmingly composed of plastic, presents a severe environmental challenge along the Somali coast. At Lido Beach in Mogadishu, plastics constitute nearly 90% of all debris, originating primarily from local recreational activities and the dumping of household waste. This pollution results in an extremely dirty coastline, with **litter densities among the highest recorded globally.**

The prevalence of this waste threatens marine biodiversity in the ecologically rich Western Indian Ocean and jeopardises the livelihoods of coastal communities. Addressing this issue requires urgent strategies focused on improving local waste management practices, initiating comprehensive public education campaigns, and implementing consistent cleanup efforts to protect both the environment and the communities that depend on it.

11.3.2 Recreational fishing

Fishing tourism in Somalia is an emerging niche with strong potential, offering opportunities for recreational angling and marine-based experiences that complement the country's traditional reliance on coastal resources (RDI Africa, 2025). The country's waters are known for their rich fish stocks, including migratory species such as tuna and various reef fish (ITA, 2024a). However, these resources face pressure from Illegal, Unreported, and Unregulated (IUU) fishing, which threatens fish stocks critical to both sport fishing and dive-based tourism (MARCOD, 2025).

Efforts such as the Somali Sustainable Fisheries Development Project ("Badmaal") (see Text box 35), supported by the World Bank, are directly contributing to the foundational elements needed for recreational fishing (ITA, 2024). Enhancing sustainable fisheries management, providing training to local fishermen, and combating illegal fishing ensure the health of marine ecosystems and the availability of diverse fish populations necessary for recreational angling (World Bank, 2025b; Dalsan, 2024). While recreational spearfishing is not yet a widely documented NBT activity, the presence of diverse reef systems and healthy fish populations, particularly in regions such as Puntland, indicates future potential for niche markets as security and infrastructure improve (PADI, undated).

Text box 35: Badmaal Project – Laying foundations for sustainable coastal and marine NBT

Sources: World Bank, 2025a; Dalsan, 2024; Ministry of Fisheries and Blue Economy, 2024

The **Somali Sustainable Fisheries Development Project, locally known as "Badmaal"**, launched in late 2024, is a pivotal initiative laying crucial foundations for future coastal and marine NBT in Somalia. While primarily focused on improving fisheries management and livelihoods, its emphasis on sustainable resource use and community capacity building directly supports the ecosystem health vital for NBT.

The Project aims to improve the sustainable management of selected fisheries and enhance the capacity of targeted coastal communities to benefit from marine resources. This includes efforts to provide training and equipment to fishermen, improve infrastructure, and enforce regulations to protect marine resources. Although direct tourism numbers are not yet a primary metric, strengthening the fisheries sector by combating **IUU fishing, which is estimated to cause losses of USD 100-450 million annually**, ensures healthier fish stocks and more pristine marine environments, which are fundamental for NBT.

Badmaal seeks to connect fishing cooperatives across Somalia, enhancing their skills and improving incomes for thousands of fishermen. By fostering sustainable practices and empowering local communities, the project indirectly builds the capacity for community-based ecotourism ventures, such as responsible fishing tours, supplying fresh fish to NBT operations, dolphin watching, or even future dive operations around healthy reefs. This holistic approach is critical to the long-term viability and growth of coastal and marine NBT in Somalia.

Key fishing areas with NBT potential include:

- **Northern Coast (Puntland and Somaliland):** Known for its unique marine ecosystems in the Gulf of Aden, with potential for both artisanal and sport fishing, alongside emerging opportunities for marine exploration (MARCOD, 2025).
- **Central and Southern Indian Ocean Coast:** Offers vast, underutilised fish stocks and pristine waters, ideal for future sport fishing and responsible marine encounters (Nairobi Convention, undated).

11.3.3 Marine safaris

Somalia's strategic location along major migratory routes for cetaceans offers substantial, though currently undeveloped, potential for whale and dolphin watching and broader marine safaris (NEC of Somalia, 2024). Humpback whales (*Megaptera novaeangliae*) and various dolphin species are known to frequent Somali waters (CMS, 2023). While organised boat-based wildlife tours are not yet a widespread feature of Somalia's tourism landscape, the increasing focus on blue economy development and marine conservation provides a platform for their future establishment. However, the **development of such ventures must also contend with the persistent threat of maritime terrorism** and piracy, which has historically impacted security perceptions and operational safety in the region (see Text box 36) (Shortland & Vothknecht, 2011). **Local communities often have traditional knowledge of marine life movements, which could be leveraged for responsible, community-led marine safari ventures** (NEC of Somalia, 2024).

Although political and economic instability persists, small-scale tourism ventures are emerging and could become significant drawcards, offering authentic encounters with marine megafauna in a largely undisturbed environment (Ibid.). However, **the development of such ventures faces constraints**, including a shortage of trained personnel in specialised marine tourism fields and limited vocational training capacity, which affects service quality and alignment with international standards (World Bank, 2025b). Additionally, Somalia's vulnerability to climate change, manifested in sea level rise, coral bleaching, and extreme weather, poses risks to marine ecosystems and infrastructure, introducing uncertainty for long-term tourism investment (MARCOD, 2025).

Text box 36: Maritime terrorism and piracy

Source: Mamouni, 2025; Shortland & Vothknecht, 2011

The Somali coast has historically been associated with maritime terrorism and piracy, particularly stemming from the destabilisation of the State following the civil war. These activities have primarily been motivated by economic gain, political grievance, and the absence of effective coastal governance. While international naval patrols and onshore security efforts have significantly reduced successful piracy attacks since their peak in 2011, the underlying drivers and latent capabilities remain a concern for maritime security analysts.

According to the Maritime Information Cooperation for Piracy and Terrorism (MICA) Security 2024 annual report, “*After several years of decline, piracy is on the rise again (+110% in one year), particularly off the coast of Somalia.*” Between 7 February and 16 March 2025, two fishing vessels and a dhow were hijacked off the coast of Somalia, according to the International Maritime Bureau. **Somali piracy cost the shipping industry and governments almost USD 7 billion in 2011 during its peak.** The current surge may not match the risks posed in 2011, but it is unfolding within a novel and complex web of criminal activity.

For marine tourism, this legacy presents a significant challenge in terms of risk perception and insurance costs. The potential for maritime crime adds a layer of complexity to operational planning for activities such as marine safaris, necessitating robust security protocols and ongoing coordination with national and international maritime security forces to ensure the safety of tourists and operators.

11.4 Challenges facing coastal and marine NBT in Somalia

- **Insecurity and negative perception:** Decades of conflict and the lingering threat of extremist groups deter international tourists (CBD, undated). Despite improved security in some areas, travel advisories from most Western countries persist, severely limiting tourist arrivals and the ability to establish formal NBT operations (World Bank, 2024).
- **Limited and inadequate infrastructure:** Somalia lacks essential tourism infrastructure, including paved coastal roads, reliable power, effective waste management, and quality accommodation. While major commercial ports see investment, dedicated NBT infrastructure, such as marinas or tourism jetties, are non-existent, hampering visitor access and experience (NEC of Somalia, 2023).
- **Weak policy and enforcement:** Comprehensive, coordinated policy frameworks for marine tourism are still emerging. Gaps in regulation for marine protected areas, sustainable practices, and operator licensing exist, coupled with weak enforcement capacity. This leads to issues such as unregulated coastal development and destructive fishing, directly threatening NBT resources.
- **Unsustainable resource utilisation:** Somalia's marine ecosystems are under pressure. Illegal, Unreported, and Unregulated (IUU) fishing by foreign and domestic vessels is rampant, depleting fish stocks vital for sport fishing and dive tourism, and causing habitat destruction (MARCOD, 2025).
- **Limited human capital and skills gap:** There's a severe shortage of trained personnel in specialised coastal and marine NBT fields (e.g., marine guides, dive instructors, hospitality staff). Limited vocational training institutions mean building a skilled workforce from scratch is a long-term challenge, impacting service quality and the ability to meet international standards (World Bank, 2025a).
- **Vulnerability to climate change:** Somalia is highly vulnerable to climate change impacts. Rising sea levels, increasing sea surface temperatures causing coral bleaching, and more frequent extreme weather events threaten critical marine ecosystems (reefs, mangroves) that are core NBT attractions. This can also damage emerging infrastructure and disrupt tourism operations, creating uncertainty for investors (MARCOD, 2025).

11.5 Opportunities for coastal and marine NBT in Somalia

- **Exceptional marine biodiversity:** With the longest coastline, Somalia's waters offer pristine, unexplored coral reefs, diverse fish populations, and major migratory routes for humpback whales and various dolphin species (UNEP, 2023; MARCOD, 2025).
- **Government commitment to the blue economy:** The Somali government prioritises the blue economy for economic recovery and job creation. The National Blue Economy Strategy (NEC of Somalia, 2024) and the National Development Plan 9 (Federal Republic of Somalia, 2022) explicitly promote tourism as a key sector, providing a supportive environment for NBT development.
- **Emerging MPAs and conservation focus:** The ongoing establishment of MPAs, such as those proposed around Saad ad-Dim Island and Maydh Island, will create crucial hubs for NBT. Systematic conservation efforts, often internationally supported, are identifying and protecting biodiversity hotspots, forming the ecological assets vital for sustainable NBT (GEF, 2024).
- **Potential for community-based tourism & cultural integration:** There is strong potential for community-based tourism (CBT) models that directly empower coastal communities through NBT, leveraging their traditional knowledge and ensuring benefit-sharing (Dalsan, 2024). This can seamlessly integrate with Somalia's rich coastal cultural heritage in historic port towns such as Mogadishu and Kismayo, offering unique cultural walking tours, traditional dhow sailing, and local culinary experiences alongside marine activities, providing a deeper, more diverse visitor experience.

Despite numerous challenges related to security, climate change, infrastructure, governance and capacity, Somalia is endowed with unique biodiversity along an extensive coastline which forms an important asset base for developing coastal and marine NBT activities.

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12. South Africa



Land area
1,220,170km²



Total tourism numbers
10.5 million



Total marine and coastal area
1,547,395km²



Total tourism contribution to GDP (8.2%)
USD 30.8 billion



Population
64,007,187



International visitor spending (21.6%)
USD 5.9 billion



Protected area size (marine) (15.43%)
238,703km²



Domestic visitor spending (78.4%)
USD 21.5 billion



Total travel & tourism jobs
1.46 million

Sources: UNEP-WCMC, 2025, World Bank, 2025, WTTC, 2024

12.1 Introduction

South Africa, positioned at the southernmost point of the African continent, shares land borders with Namibia, Botswana, Zimbabwe, Mozambique, and Eswatini, and is bounded on three sides by the Atlantic and Indian Oceans. **The country encompasses approximately 1.22 million km² and possesses a coastline of about 3,000 km, the third longest in Africa** (DFFE, 2014; South African Government, 2024). This extensive coastline, spanning two oceans, underpins a rich coastal and marine tourism portfolio. Although this study focuses on the Western Indian Ocean region, the South African case includes examples from both coasts, as available data are not always disaggregated, and the Atlantic coastline also contributes significantly to coastal and marine nature-based tourism. South Africa has 42 Marine Protected Areas (MPAs), covering an area of 238,703 km² (15.43%) (UNEP-WCMC, 2025). Text box 37 highlights the role of MPAs in supporting tourism and coastal livelihoods.

South Africa's extensive coastline supports significant small-vessel traffic associated with tourism, recreation, and subsistence activity (Sowman, 2006). Operational data from the 2023 Boat Launch Site Monitoring System (Daly et al., 2024) demonstrates the intensity of coastal resource use within KwaZulu-Natal, where monitored sites such as Sodwana Bay, Cape Vidal, St Lucia, Umkomaas, and Shelly Beach recorded consistently high levels of vessel launches across recreational, charter, scuba-diving, and non-consumptive wildlife sectors (Branch et al., 2002; Mann et al., 2015). These patterns underscore the **strong dependence of coastal economies on marine-based tourism** and reflect the national importance of boat-based nature-based tourism activities, particularly in regions adjacent to MPAs such as iSimangaliso and Aliwal Shoal (Branch et al., 2002; Turpie et al., 2000).

Within its waters, the country has established a network of Marine Protected Areas (MPAs) to conserve critical habitats and species. **As of 2025, there were 42 MPAs, covering roughly 15.43% of South Africa's marine territory** (UNEP-WCMC, 2025). These MPAs often double as tourism attractions where visitors can experience relatively pristine marine environments (through scuba diving and snorkelling tours, amongst others) while contributing to conservation via park fees.

Text box 37: The role of MPAs in supporting tourism and coastal livelihoods

Source: Mann-Lang et al., 2021; Marineprotectedareas.org, undated; MPA Forum, undated; Sawubona, 2023; Tunley, 2009

Marine Protected Areas (MPAs) are significant drivers of tourism, offering visitors opportunities to experience diverse marine life and relatively intact ecosystems. Examples include iSimangaliso Wetland Park, a UNESCO World Heritage Site in KwaZulu-Natal known for diving, snorkelling, and turtle-watching; De Hoop MPA, which offers some of Africa's best land-based whale watching and guided marine walks; and Protea Banks, a globally recognised shark-diving site.

Tourism activities within MPAs generate employment for local communities, particularly in guiding, boat operations, scuba diving services, and hospitality. These benefits extend to local businesses such as restaurants and accommodation, creating economic spillovers in adjacent coastal towns. **MPAs also serve as educational platforms**, supporting environmental awareness and cultural heritage initiatives, as seen at Robben Island MPA. In ecological terms, **MPAs protect critical spawning and nursery grounds**, enabling spillover benefits that sustain fisheries and enhance biodiversity for tourism activities.

Launch-site activity data from the BLSMS (Daly et al., 2024) confirms that MPAs such as iSimangaliso Wetland Park and Aliwal Shoal support some of the highest marine-tourism intensities in KwaZulu-Natal. Sodwana Bay and Umkomaas consistently recorded elevated scuba, charter, and recreational fishing launches, demonstrating how **MPAs act as focal points for diverse tourism and livelihood activities**. The strong overlap between protected-area boundaries and vessel-based tourism use also reinforces the need for effective compliance monitoring, as high activity levels increase both ecological pressure and economic reliance on sustainably functioning MPAs.

Despite their benefits, **MPAs face several challenges**. Conflicts may arise with traditional resource users, particularly fishers, who can perceive restrictions as limiting livelihoods. Limited budgets and insufficient enforcement capacity risk turning some MPAs into "paper parks," undermining conservation and tourism potential. Unregulated or poorly managed tourism can harm habitats, exacerbate pollution, and disrupt marine species. Weak infrastructure, especially in waste management, further exacerbates environmental pressures.

Equitable access remains another challenge, as some protected areas carry legacies of exclusion and require sensitive engagement with historically marginalised communities. Furthermore, climate change presents long-term threats such as ocean warming, acidification, and sea-level rise, which undermine the resilience of marine ecosystems despite MPA protections.

Key South African MPAs supporting tourism:

Several MPAs are major attractions for both local and international visitors:

- **Aliwal Shoal MPA (KwaZulu-Natal):** renowned for shark-diving experiences.
- **Addo Elephant National Park MPA (Eastern Cape):** extends terrestrial protection into marine zones, creating integrated land-sea tourism opportunities.
- **De Hoop MPA (Western Cape):** a leading site for land-based whale watching.
- **iSimangaliso Wetland Park MPA (KwaZulu-Natal):** popular for diving, snorkelling, and turtle nesting tours.
- **Robben Island MPA (Western Cape):** combines cultural heritage with marine conservation, including protection of an important African penguin (*Spheniscus demersus*) colony.
- **Table Mountain National Park MPA (Western Cape):** supports water sports and tidal pool exploration around the Cape Peninsula.
- **Tsitsikamma MPA (Eastern and Western Cape):** South Africa's oldest MPA, offering rich biodiversity and diverse recreational activities.

South Africa hosts exceptional coastal and marine diversity with 163 marine ecosystem types and 190 coastal ecosystem types with a wide range of different habitats including sandy shores, rocky shores, estuaries, bays, kelp forests, reefs, banks, islands, open ocean, sea mounts and sandy shelves, amongst others (Marineprotectedareas.org, undated; South African National Biodiversity Institute, undated). Approximately 30% of seaweed species in the country and 40% of South Africa's estimated 10,000 marine animal species are endemic (South African National Biodiversity Institute, undated) providing unique nature-based tourism opportunities.

12.2 Statistics and economic significance of coastal and marine NBT

Tourism is a vital sector in South Africa's economy and a cornerstone of its international image. The country welcomed over 8.9 million international tourists in 2022 (UNWTO, 2025), making it one of Africa's leading destinations. **Travel and tourism (including domestic and international) contributed approximately USD 30.8 billion (8.2%) to South Africa's Gross Domestic Product (GDP) in 2023, supporting an estimated 1.46 million jobs** (WTTC, 2024).

Boat Launch Site Monitoring System (BLSMS) data for 2023 (Daly et al., 2024) which provides site-level evidence of the operational demand generated by coastal and marine tourism, found that across monitored KwaZulu-Natal launch sites, high annual launch frequencies were recorded for charter activities, recreational fishing vessels, and scuba diving operations, reflecting the consistent utilisation of these locations by both domestic and international visitors. The concentration of launches at Sodwana Bay, Umkomaas, and Shelly Beach is particularly indicative of the economic significance of these tourism nodes. These quantitative patterns complement national economic estimates by illustrating how tourism value is expressed through daily vessel traffic and the sustained use of MPAs and adjacent areas.

Coastal and marine tourism ranked among the top four maritime sub-sectors, contributing ZAR 19 billion (approx. USD 1.3 billion) to South Africa's GDP in 2013 (SAMSA, 2016). It is likely that 12 years later, this figure is even higher. Operation Phakisa (2014) estimates that South Africa's oceans could contribute up to ZAR 177 billion (approx. USD 9.57 billion) to GDP by 2033, indicating the significant economic potential of the country's marine space. Read more on Operation Phakisa in Text box 38.

Recent continental developments also signal growing momentum in coastal and marine tourism, with initiatives to expand ocean-based tourism circuits and cross-border collaboration, see Text box 39 on Africa's marine tourism sector. These efforts align with regional blue economy strategies and present opportunities for South Africa to further leverage its coastal and marine assets.

An example of the intersection between biodiversity, tourism, and local livelihoods is the annual sardine run along the east coast of the country. This ecological phenomenon supports coastal and marine nature-based tourism while generating economic opportunities for coastal and indigenous communities, particularly through localised job creation, informal trade, and cultural tourism offerings (see Text box 40).

Text box 38: Operation Phakisa: Unlocking South Africa's ocean economy

Source: DFFE, 2014

Launched in 2014, Operation Phakisa is a South African government initiative designed to fast-track the growth of the country's National Development Plan. As a cross-sectoral programme, it identified the ocean economy as one of its initial priority areas, other sectors included were health, education, mining, waste, agriculture and biodiversity. The initiative sought to maximise economic returns, enhance job creation, and promote sustainable resource use to alleviate poverty. **The initiative projects that South Africa's oceans could contribute up to ZAR 177 billion (approx. USD 9.57 billion) to GDP and generate over one million jobs by 2033.**

Operation Phakisa focuses on six key growth areas:

- *Marine transport and manufacturing:* Enhancing shipbuilding and repair capabilities to serve local and international markets.
- *Offshore oil and gas exploration:* Developing infrastructure and regulatory frameworks to tap into offshore hydrocarbon resources.
- *Aquaculture:* Expanding fish farming to meet growing demand and ensure food security.
- *Marine protection services and ocean governance:* Implementing measures to safeguard marine ecosystems and ensure sustainable use of ocean resources.
- *Small harbours development:* Upgrading and constructing small harbours to support local economic activities.
- *Coastal and marine tourism (CMT):* Promoting tourism activities that leverage South Africa's rich marine biodiversity.

By focusing on these areas, Operation Phakisa aims to unlock the economic potential of South Africa's oceans while ensuring environmental sustainability and inclusive growth.

Text box 39: Africa's coastal and marine tourism sector gathers momentum

Source: Voyages Afriq, 2025

Nelson Mandela Bay, South Africa, hosted the first-ever Africa's Coastal Marine and Maritime Tourism Trade Market in April 2025. By **building cross-border partnerships and prioritising inclusivity**, this Trade Market seeks to elevate African coastal and marine tourism, diversify products, drive economic opportunity, and reinforce environmental stewardship. This landmark event, organised by the Africa Coastal Marine & Maritime Tourism Alliance, aimed to:

- Showcase coastal and marine tourism, such as cruises, river rafting, and canoeing, offering an alternative to Africa's traditional safari narrative.
- Encourage sustainable development and exchange of best practices across the continent by bringing together governments, tour operators, investors, Small and Medium-sized Enterprises (SMEs), and coastal communities.
- Leverage regional collaboration through mechanisms such as the African Continental Free Trade Area (AfCFTA) to create integrated tourism experiences, including potential cruise routes linking coastal and inland destinations.
- Support SMEs with resources on skipper training, financing, and licensing, enabling entrepreneurs to establish sea-based businesses with relatively low upfront costs.

Text box 40: Socio-economic implications of the sardine run for indigenous communities

Source: Myeza et al., 2010

The annual sardine run along South Africa's KwaZulu-Natal coast presents significant economic potential for local communities. Although only 17.6% of surveyed community members reported earning income from the event, the **total direct financial benefit was estimated at ZAR 17–18 million (approximately USD 315,000–333,000) per year**. When accounting for multiplier effects, this figure could increase to between ZAR 34 million and ZAR 54 million (approximately USD 4.6–7.4 million).

Among those who did earn income, **individual earnings ranged from ZAR 60 to ZAR 5,000 (approximately USD 8 to USD 681), with an average of approx. ZAR 1,000 (USD 136) per person**. The large proportion of participants who engage with the sardine run passively, without generating any financial benefit, points to an untapped opportunity for community development and upliftment, even though many of these individuals may already be employed in other sectors.

Approximately 67.8% of respondents were aware of the sardine run, 55.3% participated in some way, and 69.6% expressed a willingness to undergo training to better engage with the event. However, participation was largely non-income generating, with observers (over 70%) being the predominant group. **Enhancing skills, entrepreneurial training, and increasing community involvement** were identified as critical steps to improve the socio-economic impact of the sardine run for historically marginalised groups.

The next sections provide an overview of the main coastal and marine nature-based tourism (NBT) activities in the country. Disaggregated socio-economic data for the different activities was found to be inconsistent and often outdated. Consistent, comparable data collection and analysis is important in terms of understanding the value of coastal and marine NBT and providing information for evidence-based policy- and decision-making, and should be done at provincial and national levels.

12.3 Overview of coastal and marine nature-based tourism activities

Coastal and marine nature-based tourism (NBT) refers to leisure or recreational travel centred on the coastal and marine environment, whether enjoying beaches, observing marine wildlife, or engaging in ocean adventures (Geldenhuys et al., 2019). Coastal and marine NBT attracts international visitors to South Africa, drawn by its rich coastal and marine fauna and flora (Mabaleka et al., 2020). Building on this appeal, the sector has become an important and expanding component of the tourism industry, capitalising on the country's extensive coastline, diverse marine biodiversity, and distinctive ocean-based experiences (Geldenhuys et al., 2019). South Africa's coastal waters are teeming with life; at least 37 species of whales and dolphins can be found in the country's waters, alongside sharks, seals, seabirds, turtles, coral reefs and more (Geldenhuys et al., 2019). This biodiversity underpins a wide range of coastal and marine NBT activities.

Text box 41: The impact of Blue Flag status on tourist decision-making when selecting a beach

Sources: Geldenhuys & van der Merwe, 2014; Slater & Mearns, 2018

Research in South Africa suggests that while Blue Flag status has a limited direct impact on beach selection, its underlying criteria closely align with tourist preferences. Geldenhuys & van der Merwe (2014) conducted a survey of 572 visitors across six KwaZulu-Natal beaches, finding that **cleanliness, safety, and access, as well as landscape aesthetics, were the most important factors influencing beach choice**, with minimal differences between Blue Flag and non-Blue Flag sites. Visitors placed low importance on the Blue Flag label itself but valued tangible attributes such as clean water, lifeguard presence, and well-maintained facilities.

Complementary findings from a national study by Slater & Mearns (2018) reinforce that **beach users consistently prioritise clean beaches, water quality, and a welcoming environment** across South Africa's Blue Flag-accredited sites. Observed beach activities, such as swimming, tanning, and surfing, also reflect the importance of safe, attractive, and well-managed environments.

Together, these studies highlight the importance of increasing public awareness of the Blue Flag programme and promoting it more effectively as a symbol of quality and sustainability. While its eco-label alone may not drive visitation, the Blue Flag's environmental and service standards directly meet tourist expectations, offering a strategic opportunity for coastal municipalities to enhance tourism competitiveness while supporting coastal and marine conservation objectives.

Text box 42: Flock to Marion: A high-value nature-based cruise linking tourism and conservation

Sources: BirdLife South Africa, 2025; Mammal Watching, 2025

The Flock to Marion cruises represent a niche but high-value segment of marine and cruise tourism in South Africa, attracting birdwatchers, seabird enthusiasts, and conservation supporters to remote sub-Antarctic waters. For example, **the 2025 voyage aboard MSC Musica raised over ZAR 9 million (approx. USD 487,800) in support of the Mouse-Free Marion Project**, highlighting its role not just as a tourism product but as a fundraising and awareness mechanism for conservation. The cruise also commands premium pricing; a twin-share inside cabin on the January 2025 itinerary was listed at approx. USD 900 per person, indicating considerable revenue potential per berth. As such, while small in scale compared to mainstream cruise operations, Flock to Marion delivers disproportionate value through integration of experiential tourism, fundraising, and biodiversity protection in South Africa's coastal and marine tourism portfolio.

12.3.1 Beach and coastal nature activities

South Africa's coastal tourism industry increasingly emphasises environmental quality, safety, and visitor satisfaction (du Preez & du Plessis, 2024). Understanding visitor preferences is essential for sustainable destination management as coastal tourism grows. A national study by du Preez and du Plessis (2024), based on 1,138 beachgoer surveys, revealed that most visitors were single, educated females in their 30s, primarily motivated by beach quality, swimming, and relaxation. The study identified **two key tourist segments: "quality beach seekers," who prioritise clean, tranquil environments, and "escape seekers," who value memorable experiences and the opportunity to disconnect**, highlighting the importance of tailored marketing and well-managed coastal tourism.

A Blue Flag certification is an internationally recognised eco-label awarded to beaches, marinas, and sustainable boating tourism operators that meet strict environmental, educational, safety, and accessibility criteria (WESSA, 2024). It is managed globally by the Foundation for Environmental Education (FEE) and coordinated in South Africa by WESSA (Wildlife and Environment Society of South Africa). **In 2024, South Africa held 48 Blue Flag certifications along its coastline**, 33 in the Western Cape and nine each in KwaZulu-Natal and the Eastern Cape, demonstrating a strong commitment to environmental, safety, and hygiene standards (WESSA, 2024). This internationally recognised eco-label enhances the quality of visitor experiences and appeals to tourists seeking sustainable beach destinations (see Text box 41 for more on South Africa's Blue Flag beaches).

12.3.2 Cruise tourism

Cruise-liner, or cruise, tourism is a growing niche within South Africa's broader tourism sector, with Cape Town and Durban serving as key ports of call, and occasionally as homeports, for international cruise lines (TKZN, 2023). Cape Town's iconic Table Mountain, scenic coastline, and nearby attractions make it a top cruise destination, while **Durban, supported by a new ZAR 200 million (USD 11 million) terminal, has emerged as Southern Africa's leading cruise hub**, hosting vessels such as MSC's *Splendida* and the RMS *Queen Mary 2* (TKZN, 2023). **During the 2019–2020 season, over 700,000 passengers visited South African ports** (Ibid). In the 2023–24 season alone, 67 cruise vessels docked in Cape Town between November and June, indicating the city's growing status in global cruise tourism (Boting, 2024).

Although cruise-liner tourism is not, strictly speaking, a direct nature-based tourism (NBT) activity, it often gives rise to indirect NBT opportunities. These include birdwatching from vessels, marine mammal sightings, and nature-based excursions once passengers disembark, such as coastal hikes or visits to protected areas. **An important exception, however, is the Flock to Marion cruise organised by BirdLife South Africa, which constitutes a direct NBT activity due to its explicit focus on seabird viewing and conservation** (see Text box 42).

From an academic perspective, cruise tourism is starting to receive scholarly attention in South Africa. Rink (2020) discusses the phenomenon of “cruises-to-nowhere”, unique short cruises that depart and return to the same port without visiting other destinations. Similarly, research by Jugmohan and Giampiccoli (2014) explores the potential for linkages between cruise tourism and community-based tourism (CBT), suggesting opportunities for poverty alleviation and local development through collaborative practices.

12.3.3 Recreational fishing

Fishing tourism, comprising recreational angling and marine wildlife experiences, significantly contributes to South Africa's economy. **In 2021, an estimated 1.33 million recreational fishers participated in marine and freshwater fisheries, generating approx. ZAR 32.6 billion (approx. USD 2.2 billion) in annual economic activity and supporting approx. 94,000 full-time jobs** (Potts et al., 2021). However, much of the financial benefit accrues to higher-income households, with less than 10% reaching lower-income households, and this is likely to be mirrored in developing countries where recreational fisheries are driven by international tourism (Ibid.). Potts et al. (2021) indicate that this disparity stems from structural issues, including high-income ownership of tourism assets, reliance on affluent tourists, and limited advancement for low-wage workers. Barriers such as restricted access to finance, permits, and training further limit coastal community participation, a trend likely mirrored in other developing countries that rely on international recreational fisheries (Ibid.).

The BLSMS 2023 dataset (Daly et al., 2024) reinforces these national trends, showing that recreational fishing constitutes one of the largest user groups at monitored KwaZulu-Natal launch sites. St Lucia, Cape Vidal, and Sodwana Bay exhibited particularly high levels of recreational launches, aligning with their established reputations as premier angling destinations. Species landing records from these sites further demonstrate the continuing importance of coastal and estuarine fisheries for both local fishers and visiting anglers. Monitoring of Daily Bag Limits (DBLs) and species composition provides valuable insight into resource pressure, fishing seasonality, and the socio-economic relevance of recreational fishing within coastal communities.

Recreational spearfishing in South Africa remains a niche yet growing segment of marine tourism, particularly popular around prime reef systems, such as Sodwana Bay on the KwaZulu-Natal coast, one of the country's most renowned spearfishing destinations (Spearzen, 2025). Globally, spearfishers make up less than 5% of marine recreational fishers, but they often target larger, higher-trophic species, offering a unique socio-ecological disconnect from traditional angling (Sbragaglia et al., 2023). **While not yet extensively documented, competitive spearfishing events in South Africa mirror international trends, where per-competitor spending averages between USD 1,090 and USD 1,649 per event** (Schilling et al., 2022).

Key coastal and deep-sea fishing sites

- **Cape Town and False Bay:** World-class inshore and deep-sea fishing for edible species such as kabeljou (*Argyrosomus japonicus*) and galjoen (*Dichistius capensis*) (Rogerson & Rogerson, 2024).
- **Durban and Kwa-Zulu Natal coast** (Richards Bay to Port Shepstone): Beyond Durban, the Natal coast offers significant opportunities for sport fishing, particularly at resorts such as Richards Bay in Zululand and the St Lucia Bay and estuary (Rogerson & Rogerson, 2024). St Lucia, in particular, provides excellent year-round fishing from both boat and shore (Ibid.).
- **Sodwana Bay:** Popular for spearfishing, featuring warm, clear waters and vibrant coral reefs within the iSimangaliso Wetland Park (Spearzen, 2025).

12.3.4 Scuba diving

Sodwana Bay reportedly receives approx. 60,000 dive visitors annually, supporting a thriving local dive industry (Saayman & Saayman, 2012). In the 2023/24 financial year, **tourism overall in iSimangaliso Wetland Park, where the bay is located, generated over ZAR 27 million (approx. USD 1.5 million)** (iSimangaliso Wetland Park, 2024). Dicken et al. (2025) estimate **the annual economic value of the shark-diving sector at Protea Banks in KwaZulu-Natal to be ZAR 39.9 million (approx. USD 2.6 million)**. The sector employs people across tourism-linked sectors, including accommodation, guiding, and boat operations (Dicken & Hosking, 2009).

BLSMS records (Daly et al., 2023) show that scuba diving activities contribute substantially to overall vessel launches at Sodwana Bay, Umkomaas (Aliwal Shoal), and Shelly Beach (Protea Banks). These sites consistently reported high-frequency diving operations throughout 2023, reflecting their status as key tourism assets linked to coral reef systems and shark-based ecotourism. The prominence of scuba launches in the dataset highlights the economic and ecological importance of maintaining healthy reef systems and the central role of operator compliance, weather conditions, and environmental stability in sustaining diving-based tourism.

Key dive sites and ecosystems

- **Sodwana Bay** (KwaZulu-Natal), located within the iSimangaliso Wetland Park (a UNESCO World Heritage Site), features Africa's southernmost coral reefs. The Bay supports over 1,200 species of fish and numerous invertebrates, turtles, and megafauna such as whale sharks (*Rhincodon typus*), reef manta rays (*Manta alfredi*) and oceanic manta rays (*Manta birostris*) (Celliers & Turpie, 2001). Text box 43 provides insight into challenges facing Sodwana Bay's dive sector.

- **Aliwal Shoal** (KwaZulu-Natal) is globally recognised for its shark diving experiences, particularly ragged-tooth sharks (*Carcharias taurus*) and tiger sharks (*Galeocerdo cuvier*) (Dicken & Hosking, 2009). Dive tourism in the region is concentrated on these encounters and is a significant drawcard for adventure tourists (Ibid.).
- **Protea Banks**, further south near Shelly Beach (KwaZulu-Natal), is a deep reef known for sightings of scalloped hammerhead (*Sphyrna lewini*) and Zambezi (*Carcharhinus leucas*) sharks, especially during the sardine run (Text box 40) (ISRA, 2023). It has been identified as a hotspot for shark diving and pelagic fish encounters (DANSA, 2022).

Text box 43: Navigating risk and resilience in Sodwana Bay's dive tourism

Source: Dimopoulos et al., 2021

A study conducted by Dimopoulos et al. (2021) explores the vulnerability of dive tourism in Sodwana Bay, located within the iSimangaliso Wetland Park World Heritage Site in South Africa, to various external risks. The study draws on interviews with dive operators, resource managers, and conservation practitioners to identify perceived threats and adaptive capacity. **Key risks include environmental changes (such as coral bleaching and shifting species distributions due to climate change), economic shocks (e.g., COVID-19), and socio-political issues (such as governance challenges and inequality).**

The research highlights that while Sodwana Bay benefits from a strong conservation framework and is a well-established dive destination, its **long-term viability hinges on proactive risk management and collaborative governance**. Stakeholders emphasise the need for diversification, enhanced communication, and more inclusive management strategies to build resilience. **The study highlights the importance of integrating climate adaptation into coastal and marine tourism planning and highlights Sodwana as an example of broader challenges facing nature-based tourism in the Indian Ocean region.**

12.3.5 Shark cage diving

Shark cage diving substantially contributes to local economies, especially in small coastal towns such as Gansbaai in the Western Cape, where it supports industries such as boat operations, hospitality, and related services (Mabaleka et al., 2020). **Most participants are international tourists, mainly from Europe and North America, who are attracted by the unique nature of the experience and are typically willing to spend on premium offerings** (Ibid.). However, the economic benefits are constrained by many tourists being day visitors.

The great white shark (*Carcharodon carcharias*) tourism industry in South Africa, is valued at approx. ZAR 50 million (USD 3.04 million) annually in Gansbaai alone (Mabaleka et al., 2020). Earlier assessments estimated that the broader shark-diving sector generated between ZAR 40 million (USD 4.64 million) in 2001 (Hara et al., 2003) and over ZAR 101 million (USD 6.87 million) by 2016 (McKay, 2017), highlighting its long-term economic significance. However, the industry's viability depends on consistent shark sightings. Since 2017, predation by orcas (*Orcinus orca*) has disrupted this reliability, causing sharks to abandon aggregation sites for extended periods (Towner et al., 2022). Such absences have direct economic consequences: during a 21-day disappearance in January 2016, operators collectively lost an estimated ZAR 1.5–2 million (USD 102,000–136,000) (Ibid.). These disruptions damage the industry's reputation and reduce long-term demand, threatening the stability of a sector heavily reliant on one charismatic species. While there is no evidence of a population-wide decline, the sharks' redistribution poses ecological and socioeconomic risks, particularly for tourism and local fisheries (Bowlby et al., 2023). **The shark cage-diving sector is highly capital-intensive, with the cost of a custom-built vessel and associated equipment exceeding ZAR 4.2 million (USD 329,000) in 2015, creating significant barriers to entry for less advantaged residents and contributing to unequal benefit distribution** (van der Watt, 2022).

Key shark cage diving destinations in South Africa (Johnson & Kock, 2006)

- **Gansbaai** (Western Cape): Often referred to as the "great white shark capital of the world," Gansbaai has become a hub for shark cage diving enthusiasts. The town's proximity to Dyer Island, a hotspot for great white sharks, makes it an ideal location for such activities. Gansbaai is also the only location worldwide where shark cage-diving trips run daily, due to reliable shark-aggregation conditions (van der Watt, 2022).
- **Mossel Bay** (Western Cape): Located along the Garden Route, Mossel Bay offers shark cage diving experiences, primarily focusing on encounters with great white sharks. The town's rich marine biodiversity and accessible dive sites contribute to its popularity among tourists.
- **False Bay** (Western Cape): Once famous for its breaching great white sharks near Seal Island, False Bay was a key site for shark cage diving. However, sightings have declined sharply in recent years (Hammerschlag et al., 2025), impacting tourism. Explanations for the disappearance of great white sharks from False Bay remain contested. Some studies attribute this to orca (*Orcinus orca*) predation pressure and avoidance behaviour, while others argue the decline reflects broader population-level depletion, including ongoing mortality associated with shark control measures (nets and drumlines) deployed along the KwaZulu-Natal coast (Schneider, 2025).

12.3.6 Whale watching and marine safaris

South Africa is renowned globally for its whale-watching and marine safari experiences, showcasing iconic species collectively known as the “Marine Big 5,” including whales, sharks, dolphins, seals, and penguins (Discover Africa, 2024). From June to December, southern right (*Eubalaena australis*) and humpback whales (*Megaptera novaeangliae*) migrate to South Africa's southern and eastern coastlines, often seen from land or boat, particularly in Hermanus and the South Coast (International Whaling Commission, undated). **Hermanus alone draws an estimated 100,000 to 160,000 visitors annually during peak whale season and is home to the Hermanus Whale Festival, which contributed approx. ZAR 55 million (approx. USD 3.36 million) to the local economy in 2019** (Hermanus Whale Festival, 2022). Some residents have criticised the event as overly commercialised, increasingly focused on crowds rather than on the essence of community and marine life (Hermanus Magazine, 2025).

Boat-based wildlife tours are popular across 28 designated regions from Port Nolloth to Sodwana Bay, with more than 5,500 cetacean (whale, dolphin, or porpoise) encounters recorded in the Western Cape over a decade (International Whaling Commission, undated). **In Plettenberg Bay, whale, dolphin, and seal-viewing tourism generates approx. ZAR 371 million (approx. USD 25 million) annually** (WWF, undated). However, a study by Judge et al. (2020) found that most boat-based whale watching websites lack clarity on legal permit regulations, with many featuring non-compliant photographs, raising concerns that misleading advertising may create unrealistic tourist expectations and threaten efforts to ensure sustainable marine ecotourism.

12.4 Challenges facing coastal and marine NBT in South Africa

- **Regulatory gaps and misleading marketing:** Judge et al. (2020) found that most boat-based whale-watching operators do not clearly communicate permit regulations, with widespread use of non-compliant photos, risking ecological sustainability and tourist misinformation.
- **Governance and sustainability challenges:** Operational findings from the BLSMS (Daly et al., 2024) highlight additional governance and sustainability challenges relevant to nature-based tourism:
 - Compliance monitoring at launch sites revealed recurrent issues related to permit requirements, adherence to Daily Bag Limits, and inconsistent knowledge of regulations among users. High seasonal peaks in vessel traffic at sites such as Sodwana Bay and St Lucia further compound management complexity, placing pressure on local enforcement capacity and increasing risks to both visitor safety and ecological integrity. These observations emphasise the importance of well-resourced monitoring systems to support sustainable marine tourism.
- **Limited local benefit sharing:** Despite significant economic activity, many coastal communities receive limited direct financial benefits and require support for training and entrepreneurship.
- **Environmental pressures and wildlife disturbance:** Increased coastal and marine tourism can disrupt sensitive species and ecosystems, particularly where enforcement of sustainable practices is weak or non-existent. Ocean pollution and climate change also pose a threat to coastal and marine ecosystems.
- **Lack of awareness of eco-certifications:** Blue Flag status, although well-established, remains under-recognised by tourists who prioritise tangible factors such as cleanliness and safety over certification labels. Additionally, the Blue Flag programme is losing a number of sites as a result of reduced water quality.
- **Dependence on international markets:** High-value activities such as shark cage diving largely depend on foreign visitors, making the sector vulnerable to global travel disruptions and limiting local market resilience.
- **Infrastructure and access barriers:** Many small harbours and coastal facilities require upgrades to support inclusive and sustainable tourism development, as highlighted in Operation Phakisa.
- **Data gaps:** Socio-economic and environmental data on coastal and marine tourism activities is often inconsistent and outdated, limiting the ability to accurately assess the sector's impact and constraining evidence-based policy and decision-making.

12.5 Opportunities for coastal and marine NBT in South Africa

- **High biodiversity and unique experiences:** South Africa's extensive coastline and diverse coastal and marine life (e.g., the Marine Big 5, sardine run, and coral reefs) offer world-class NBT experiences, including shark cage diving, whale watching, and scuba diving, amongst others.
- **Economic growth potential:** Coastal and marine tourism contributed ZAR 19 billion to GDP in 2013, with projections under Operation Phakisa suggesting this could grow to ZAR 177 billion (approx. USD 9.57 billion) and over 1 million jobs by 2033 (DFFE, 2014).
- **Marine Protected Areas (MPAs):** With 42 MPAs covering over 15% of marine territory (UNEP-WCMC, 2025), South Africa has a strong foundation for conservation-linked tourism (e.g. diving and snorkelling in pristine areas).
- **International and regional interest:** Events such as the Africa Coastal Marine Tourism Trade Market foster cross-border tourism circuits and SME development aligned with the African Continental Free Trade Area (AfCFTA). South Africa also benefits from strong international air connectivity, reliable road infrastructure, and a well-established tourism brand, all of which create favourable conditions for expanding ecotourism opportunities.
- **Small business development opportunities:** The BLSMS (Daly et al., 2024) dataset identifies several high-activity nodes particularly Sodwana Bay, Umkomaas, and Shelly Beach which present strong potential for expanding coastal and marine tourism circuits. The concentration of charter, recreational, and dive-based launches at these sites suggests opportunities for small business development, skill training, and complementary services that build on existing demand. Strengthening infrastructure, enhancing compliance capacity, and integrating launch-site monitoring into broader tourism planning frameworks would support the creation of more resilient and inclusive coastal economies.

- **Socio-economic inclusion:** Seasonal events such as the sardine run present localised opportunities for job creation, informal trade, and cultural tourism, especially for coastal and indigenous communities. Other coastal and marine tourism offerings could also provide opportunities for greater social inclusion, particularly along the value chain, including accommodation, food, and transportation.
- **Eco-certifications and sustainable branding:** Blue Flag beach certifications (48 in 2024) (Geldenhuys & van der Merwe, 2014) signal high standards in environmental management, which appeal to sustainability-minded tourists and should be further used in marketing campaigns.
- **Diversification of products and services and creation of tourism circuits:** In order to increase the length of stay of visitors, as well as average spend, South Africa can diversify coastal and marine tourism products and services and set up, and market, diverse coastal and marine tourism circuits.

South Africa's coastal and marine NBT sector presents a dynamic interface between conservation, economic development, and community upliftment. With a strong foundation in high-value natural assets, internationally recognised eco-certifications, and growing regional collaboration, the country is well-positioned to sustainably expand this sector. Addressing key challenges, such as regulatory enforcement, equitable benefit sharing, and infrastructure development, will be essential to reaching the full socio-economic and ecological potential of this blue economy segment. Given growing global and domestic demand for authentic coastal and marine NBT, South Africa has a timely opportunity to position its coastal and marine NBT sectors as resilient, inclusive, and globally competitive drivers of sustainable development and biodiversity conservation.

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13. Tanzania



Land area
940,689km²



Total tourism numbers
2.3 million



Total marine and coastal area
223,000km²



Total tourism contribution to GDP (9.1%)
USD 7.8 billion



Population
68,560,157



International visitor spending (68.3%)
USD 3.4 billion



Protected area size (marine) (2.31%)
5,576km²



Domestic visitor spending (31.7%)
USD 1.6 billion



Total travel & tourism jobs
1.42 million

Sources: UNEP-WCMC 2025; UNWTO, 2025; World Bank, 2025; WTTC 2024

13.1 Introduction

Tanzania has a coastline of 1,424 km, extending from its border with Kenya in the north to Mozambique in the south (Francis & Bryceson, undated). The continental shelf ranges from two to 80 km, covering up to 17,900 km² with deeper waters of up to 200 m (Nairobi Convention, 2024). The territorial sea is 64,000 km² with an Exclusive Economic Zone (EEZ) of 223,000 square kilometres (NEMC, 2024; FAO, 2025). The climate of the coastal region is typically tropical, with high temperatures, high humidity, and low wind speeds characterised by the seasonal monsoon wind regime (Mangora et al., 2024). There are five coastal administrative regions: Tanga, Pwani, Dar es Salaam, Lindi and Mtwara, which include the administrative districts of Mkinga, Tanga, Muheza, Pangani, Bagamoyo, Kinondoni, Ilala, Temeke, Kigamboni, Mkuranga, Kibiti, Mafia, Kilwa, Lindi and Mtwara along the coastline with direct contact with the ocean (Mbaga et al., 2024). These districts represent a diversity of traditions, cultures, and livelihoods.

Approximately 22% (12.9 million people) of the total population of mainland Tanzania resides in the five coastal regions (URT & RGoZ, 2022).

The coastal and marine environments of Tanzania include major estuaries, mangrove forests, coral reefs, sandy beaches, cliffs, seagrass beds and muddy tidal flats (FAO, 2025). Sandy-muddy flats or rocky reef platforms are found in the intertidal zone, while the sublittoral zone consists of extensive seagrass beds and coral reefs (Francis & Bryceson, undated). The diverse ecosystems are home to an estimated 150 species of coral in 13 families, 8,000 species of invertebrates, 1,000 species of fish, 5 species of marine turtles, and many seabirds (Francis & Bryceson, undated). **Tanzania's mangrove forests are appreciated for providing direct and indirect uses, services, and functions, the value of which is estimated at approx. Tanzanian Shillings (TZS) 4.8 trillion (approx. USD 2.1 billion) per annum** (NEMC, 2024). The overall value of ecosystem services in Tanzania was estimated at USD 104.24 billion in 2020 (Maskaeva et al., 2024).

Tanzania classifies marine protected areas (MPAs) into two types: marine parks (where extractive and non-extractive activities are allowed) and marine reserves (no-take areas where extractive activities and disturbance are strictly prohibited) (Kweka et al., 2019). Currently, there are **three marine parks in Tanzania**: Mafia Island Marine Park (MIMP), Mnazi Bay-Ruvuma Estuary Marine Park (MBREMP) and Tanga Coelacanth Marine Park (TACMP) (Ibid.). Additionally, the country has 15 marine reserves (Kweka et al., 2019). All MPAs operate under the Marine Parks and Reserves Unit (MPRU), a semi-autonomous body within the Ministry of Livestock and Fisheries Development (Ibid.). **Tanzania's several MPAs attract tourists but also sustain local livelihoods through marine-based activities** (Chevallier, 2019). When well-designed and inclusive, MPAs such as Mnazi Bay-Ruvuma Estuary Marine Park can reduce ecosystem stressors, support tourism, and enhance adjacent fisheries through spillover effects, though outcomes depend on community participation and equitable governance (Baker et al., 2021).

13.2 Statistics and economic significance of coastal and marine NBT

Tourism is a cornerstone of Tanzania's economy and the leading source of foreign currency, contributing approx. 25% of annual foreign exchange earnings (Deloitte, 2016). In 2019, the sector contributed 17% to GDP (Shali, 2024) and employed approx. 850,000 people, making it the **third-largest employer in the country** (World Bank, 2021). Before the COVID-19 pandemic, tourism accounted for more than 24% of Tanzania's total exports, ranking second only to agriculture as a foreign exchange earner (NBS, 2019).

The tourism sector has a strong multiplier effect, creating both direct and indirect jobs across a wide range of skills. By 2020, blue economy industries, including tourism, contributed USD 7.2 billion to gross value added (GVA) and employed over 2 million people (Maskaeva et al., 2024). Recent trends highlight a strong recovery post the COVID-19 pandemic. In 2023, international tourism contributed USD 7.8 billion (10.4% of GDP) and supported 1.42 million jobs (WTTC, 2024; World Bank, 2025). **Tanzania welcomed over 2.3 million international visitors in 2024 (UNWTO, 2025), with international tourists spending USD 3.4 billion**, while domestic tourism added USD 1.6 billion, both surpassing pre-pandemic levels (WTTC, 2024).

Tanzania's tourism appeal is anchored in its natural assets, wildlife, iconic landscapes, coral reefs, and sandy beaches. Wildlife remains the country's primary draw, with most visitors combining safaris with beach tourism in Zanzibar (World Bank, 2015). Zanzibar's role in the sector is significant (see Text box 44). The next sections provide an overview of coastal and marine NBT activities in the country.

13.3 Overview of coastal and marine nature-based tourism activities

Coastal and marine NBT is a significant part of Tanzania's tourism industry, offering diverse attractions that draw local, regional and international visitors. Popular activities include diving, snorkelling, recreational fishing, cultural experiences, and beach tourism. **All five mainland coastal regions provide a variety of recreational opportunities and unique sites** (Chevallier, 2019). For example, the Tanga region is well known for its scenic bays such as Moa, Manza, Kwale, Mwambani, and Tanga City, as well as its beaches with fringing and offshore coral reefs and sandbanks, such as those at Kigombe, Pangani, and Ushongo (NEMC, 2024). These complement key conservation areas such as the Tanga Coelacanth Marine Park, Maziwe Island Marine Reserve, and the Tanga Marine Reserves System (Ibid.). In the Pwani region, Mafia Island and Bagamoyo also stand out as premier tourist destinations. Chumbe Island Coral Park (CHICOP) is an example of how coastal and marine nature-based tourism (NBT) supports local livelihoods, and contributes to the local economy (see Text box 48).

Natural attractions along the coastline include sheltered bays and lagoons (Shalli, 2024). Cultural attractions include cultural heritage sites such as historical buildings that preserve important traditions of local people and their traditional lifestyles, such as performing arts, handicrafts and everyday activities (Ibid.). However, **climate change threatens these coastal and marine NBT activities** through rising sea temperatures, coral bleaching, and shifting fish populations.

Text box 44: Zanzibar

Zanzibar, a semi-autonomous region of Tanzania located in the Indian Ocean, comprises two main Islands, Unguja and Pemba. **With a population of approx. 1.6 million, the archipelago is densely populated and highly dependent on marine ecosystems, which contribute approx. 30% to GDP, of which 25% comes from coastal and marine tourism** (Lange, 2015; World Bank, 2022). Zanzibar's rich coastal and marine biodiversity, encompassing corals, seagrasses, mangroves, and numerous rare and endangered species, has positioned it as a **unique global tourism destination** (Lange, 2015). Its cultural heritage, pristine beaches, and coral reefs have earned it **recognition as a UNESCO World Heritage Site** (Ibid.). The island received 448,000 visitors in 2022, a 40.6% increase from 2021 (NBS, 2023). In 2023, out of 1.81 million international arrivals to Tanzania, a large share visited Zanzibar, confirming the enduring "safari-plus-beach" tourism model (Ministry of Natural Resources & Tourism, 2023). Text box 45 provides insights into some of the activities which take place in the coastal areas of Zanzibar. However, beyond the well-known pressures on coastal and marine ecosystems, a new and deeply concerning challenge has emerged in Zanzibar's tourism landscape, the rapid rise of unregulated turtle captivity attractions (pers. comm. S. Riedmiller, 2025) see Text box 46 on this concerning issue and its implications for conservation. Further information on Zanzibar is also included as examples in the overall Tanzania case study.

Text box 45: Zanzibar coastal and marine tourism activities

Source: Hafidh & Sharif, 2022

Zanzibar's economy is deeply tied to the ocean, with coastal and marine activities forming the backbone of its tourism-led service sector. Tourism is the Island's flagship industry, **contributing approx. 27-30% of GDP and generating over USD 400 million in foreign exchange annually.** Much of this success is driven by coastal and marine-based attractions, which remain the largest and fastest-growing segment of Zanzibar's tourism industry. The archipelago offers a wide range of marine activities, including scuba diving, snorkelling, dolphin watching, island tours, sandbank excursions, kite surfing, jet-skiing, marine aquariums, and underwater accommodation. Its coral reefs, marine reserves, and pristine beaches attract both international and domestic tourists, with visitor numbers growing from fewer than 20,000 in 1985 to 736,755 in 2024, with 71% of tourists coming from Europe (RGoZ, 2025).

Economically, these activities not only earn foreign exchange but also generate widespread employment. Tourism provides jobs for both skilled and unskilled workers, with a high percentage of women engaged in the sector, particularly in hospitality and tour operations. This makes tourism an **important driver of inclusive growth and poverty reduction in coastal communities.** The government's Blue Economy Policy and Zanzibar Development Vision 2050 place coastal and marine tourism at the centre of future growth strategies. Priorities in the Policy include sustainable management of coral reefs, expansion of marine parks, investment in cruise tourism infrastructure, and diversification into activities such as maritime heritage tours, ecotourism, and marine sports.

Text box 46: Growing threat of captive turtle tourism in Zanzibar

Source: pers. comm. S. Riedmiller, 2025

The rapid rise in tourism in Zanzibar has fueled a troubling surge in unregulated "turtle aquariums" across the islands. Reports indicate that local fishers are now catching and selling turtles to supply these facilities, contributing to the removal of hundreds, if not thousands, of turtles from the wild. This mirrors global concerns, with some regions, such as Bali, hosting more than 250 turtles in a single captive facility. While often marketed as conservation-friendly, these attractions are frequently harmful, stressing animals, encouraging illegal wildlife capture, and misleading tourists. WWF is currently developing global guidelines for "turtle sanctuaries," underscoring the urgency of addressing this issue. There is a growing call for tourism associations, to discourage member hotels from referring guests to such establishments and to promote responsible wildlife interactions instead. Tourists should also be made aware of the potential negative impacts of such experiences.

Tourism was identified in the late 1980s as a priority sector for economic development. Since then, the industry has experienced rapid growth, with international arrivals increasing from fewer than 20,000 in 1985 to over 200,000 by 2007 (Lange, 2015). Growth has continued, with total international arrivals reaching 736,755 in 2024 a 15.4% increase compared to 2023 (RGoZ, 2025NBS,2025). The sector is heavily leisure-driven, with **over 80% of visitors travelling for holiday purposes** (Ibid.). The peak tourism season runs from June to October, when mild weather and low rainfall attract the highest visitor numbers (USDA, 2025). Average stays in Zanzibar are seven nights, with holidaymakers spending the most per night at approx. USD 243 in 2024 compared to the overall average in the country of USD 218 (NBS, 2024 2023).

Tourism earnings have seen steady growth, increasing by 7.3% from USD 844.97 million in 2022 to USD 906.56 million in 2023 (NBS, 2024 2023). Of this, nearly all revenue (99.8%) came from leisure tourism, with business travel contributing only marginally. Package tours dominate the sector, accounting for 80.6% of total earnings (Ibid.). In terms of employment, at Mnemba Island, for example, between 2018 and 2020, a total of **68 people were employed**, contributing to a **wage bill of over TZS 6.5 billion (approx. USD 2.6 million)** (&Beyond, 2025).

Overall, coastal and marine NBT plays a central role in Zanzibar's economy, generating foreign exchange, supporting thousands of jobs, and funding marine conservation efforts through entrance fees to marine conservation areas. As a result of the high tourism demand and, in order to raise revenues, in September 2025, Zanzibar's Ministry of Blue Economy and Fisheries increased entry fees for marine conservation areas and MPAs from 1st September 2025 (see Text box 47) (Tourism Update, 2025). According to a public notice, the fee adjustments apply to Mnemba Island Marine Conservation Area, Menai Bay Conservation Area, Chumbe Island Coral Park, Changuu-Bawe Marine Conservation Area and the Pemba Channel Conservation Area (Ibid.).

Text box 47: Fee adjustments in Zanzibar's Marine Conservation Areas

Source: Tourism Update, 2025

Zanzibar's Ministry of Blue Economy and Fisheries announced revised entry fees for marine conservation and protected areas, effective 1st September 2025. The adjustments affect popular destinations including Mnemba Island Marine Conservation Area, Menai Bay Conservation Area, Chumbe Island Coral Park, Changuu-Bawe Marine Conservation Area, and the Pemba Channel Conservation Area. The **changes reflect a growing emphasis on sustainable financing for conservation** while encouraging visitors to travel to make a meaningful difference. Under the new structure, non-East African Community (EAC) adults (aged 16 years and older) now pay USD 10 per day, an increase from USD 3, while children aged 5–15 pay USD 5 per day. EAC citizens pay TZS 5,000 (USD 1.98) per adult and TZS 2,500 (USD 0.99) per child, whereas non-EAC residents of Tanzania pay USD 5 per adult and USD 3 per child.

The Mnemba Island Marine Special Area has retained its higher fees, with non-EAC adults paying USD 25 and children USD 10, while EAC citizens continue paying USD 10 per adult and USD 5 per child. Non-EAC residents of Tanzania are charged USD 12 per adult and USD 10 per child. Entry for children below the age of five remains free across all sites. These adjustments signal a **deliberate move towards balancing tourism revenue with conservation goals**, ensuring that marine ecosystems are sustainably managed while local communities benefit from nature-based tourism.

13.3.1 Scuba diving and snorkelling

Scuba diving and snorkelling are among the most popular forms of marine-based tourism in Tanzania, contributing significantly to the country's economy and the livelihoods of coastal communities (Obura et al., 2019). Marine Protected Areas (MPAs) play a critical role in sustaining the appeal of these types of NBT. Research shows that **highly or fully protected MPAs increase fish biomass, species diversity, and overall ecosystem resilience, leading to healthier coral reefs and more vibrant underwater experiences for divers** (Kessy, 2024). Globally, it is estimated that 70% of scuba dives take place within MPAs, although only 15% of these sites are fully protected (Cabral et al., 2025).

In Tanzania, the main centres for scuba diving and snorkelling are Zanzibar, Mafia Island, and Pemba Island, each offering unique marine biodiversity and reef systems that attract both international and domestic tourists (Obura et al., 2019). The economic contribution of scuba diving and snorkelling is notable, particularly in Zanzibar and Mafia Island, where coastal and marine tourism form a vital pillar of local economies. **Financial revenues from dive tourism in Zanzibar have been estimated at between USD 2.5 million and USD 7.4 million**, depending on the number of divers visiting annually (Ngazy et al., undated). Text box 49 describes how snorkelling and scuba diving contribute to communities in Bwejuu village in Zanzibar.

Text box 48: Chumbe Island Coral Park - linking tourism, conservation, and community

Sources: Chumbe Island Coral Park, 2021; World Bank, 2024

Chumbe Island Coral Park (CHICOP) is an example of how nature-based tourism can finance conservation while also supporting local communities. Established in the early 1990s as the **world's first privately managed marine protected area**, CHICOP operates on a high-yield, low-impact tourism model that delivers economic, social, and environmental benefits for Zanzibar. The projects that are implemented in the Park create jobs for approx. 95% local staff, over a third of whom are women, and support local enterprises including farmers, fishers, and artisans.

CHICOP has the highest employee/room ratio of any tourism business in Tanzania and employs 200% more staff than the international average for ecolodges, prioritising women and local people, including a marine biologist, educators and park rangers for park management and environmental education programmes. For example approx. 45 full-time employees cover seven rooms. In 2016, CHICOP's total annual salary expenditure was over USD 200,000; the total spent on conservation and education activities was over USD 122,000. CHICOP also provides economic opportunities by outsourcing guest transport and providing a market for local produce. **Over two-thirds of the employees come from local communities, each supporting an average of five people.** Provision of wider income opportunities such as agricultural products for the restaurant, building materials and handicrafts, outsourcing road and boat transport and craft services during maintenance, affect an even higher number of local people. Approximately USD 40,000 is spent monthly on local suppliers.

CHICOP fully funds and manages a 55-hectare no-take reef sanctuary and 16-hectare forest reserve, supporting marine biodiversity and providing spillover benefits to neighbouring fisheries. It also runs a Ministry-endorsed environmental education programme that has reached more than 11,000 stakeholders and 8,000 schoolchildren since 1996, while providing training, scholarships, and microfinance to local communities. Chumbe Island has been internationally recognised with awards such as the Global Tourism for Tomorrow Award which helps to position Zanzibar as a pioneer in sustainable tourism. In 2018, CHICOP was granted the Blue Parks Award Gold Standard of the US-Marine Conservation Institute for effective and sustainable MPA management that maximises biodiversity conservation, serves as a model for effective ecotourism and provides a platform to promote wider environmental awareness for sustainable development and ecological stewardship in Zanzibar (see [Chumbe Island Coral Reef Sanctuary » Marine Conservation Institute](#)).

Text box 49: Diving, snorkelling, and sailing in Bwejuu Village, Zanzibar

Source: Magigi & Ramadhani, 2013

Bwejuu Village, situated along Zanzibar's southeastern coast, offers unique marine-based attractions that directly involve the local community. Diving and snorkelling excursions are organised collaboratively by villagers, tour operators, and guides, with tourists paying USD 40 per trip (2013). During peak tourist seasons, seasoned local divers can earn up to USD 400 per month (2013), with most of their income spent on household needs and maintaining their equipment. These activities are largely community-driven, demonstrating strong self-mobilisation, though limited English language skills among divers remain a challenge. Sailing boat excursions are another popular activity in Bwejuu. Tourists enjoy traditional sailing experiences often combined with other water sports. Similar to diving and snorkelling, this attraction is jointly organised by villagers and tour companies, with a fee of USD 40 per person per trip (2013). Monthly revenues average USD 360 (2013), with benefits shared between community members and tour operators. A google search indicates that the 2024-2025 rate of snorkeling tours in Zanzibar typically cost approx. USD 45 to USD 65 for a half-day trip, while single scuba dives range from USD 70 to USD 110 (Scubafish Zanzibar, 2025). However, the lack of formal agreements sometimes creates disputes over benefit-sharing, and the activity is vulnerable to weather variability.

While diving can also contribute to reef pressure, studies indicate that its overall impact is relatively minor compared to larger threats such as destructive fishing practices and weak enforcement of coastal regulations (Cabral et al., 2025). Overall, scuba diving and snorkelling can provide Tanzania with both economic opportunities and conservation incentives.

13.3.2 Beach activities

Zanzibar is renowned for its pristine white sandy beaches, including Nungwi, Kendwa, Paje, and Jambiani, which are ideal for swimming, sunbathing, and various water sports (Mbanga et al., 2024). The warm and clear waters surrounding Zanzibar make it ideal for swimming, particularly on beaches with gentle waves and shallow waters near the shore, making it an excellent choice for families with children (Kelly, 2018). **On mainland Tanzania, the coastal areas also boast beautiful beaches**, particularly in

cities such as Dar es Salaam, Bagamoyo, and Tanga (Ibid.). While these beaches are less famous than those in Zanzibar, they still provide excellent opportunities for swimming and relaxation (NBS Tanzania, 2017). For instance, Coco Beach in Dar es Salaam is a popular spot where the water is warm, and the beaches are frequented by both locals and tourists (Ibid.). Marine parks in Tanzania, such as Mafia Island Marine Park and Saadani National Park, offer visitors unique opportunities to swim, snorkel, and experience the unspoiled beauty of the country's coastline (Mbanga et al., 2024).

Furthermore, the coastal regions of Tanzania are rich in Swahili culture, which adds a unique dimension to beach activities, allowing visitors to explore historical sites and engage with local communities (NBS Tanzania, 2017). This cultural richness enhances the overall experience, making the coastal regions of Tanzania attractive destinations for beach tourists (Mbanga et al., 2024).

13.3.3 Whale watching and dolphin tourism

Tanzania boasts some of the finest whale and dolphin watching destinations in the world (Braulik, 2023). Whale watching and dolphin tourism demonstrate the potential of Tanzania's coastal and marine ecosystems to generate sustainable economic value while fostering conservation outcomes (Ibid.). As discussed above, the shores of Zanzibar, the rich marine life around Pemba Island, and the pristine waters of Mafia Island and Chumbe Island are all recognised for offering world-class marine tourism experiences (Daniel, 2025). Mafia Island, especially within the Mafia Island Marine Park (MIMP), has gained international recognition as a premier destination for whale shark (*Rhincodon typus*) encounters. Whale watching in Tanzania contributes to both biodiversity conservation and the blue economy, drawing high-value marine tourists and providing direct income opportunities for local communities through guiding, boat operations, and associated services (Cagua et al., 2020). The presence of charismatic megafauna such as whale sharks (*Rhincodon typus*) and humpback whales (*Megaptera novaeangliae*) have positioned Tanzania as a competitive ecotourism destination within the Western Indian Ocean region, see Text box 50 for more information on whale watching.

Dolphin tourism is well established in Kizimkazi, Zanzibar, where surveys indicated that 6,735 tourists participated in dolphin tours in 2003, representing 10% of all visitors to Zanzibar that year (WIOMSA, 2007). The majority of these tourists were European, mainly from the United Kingdom and Italy (Ibid.). This niche sector has generated approx. 165 local jobs, making it a vital contributor to livelihoods in coastal communities (WIOMSA, 2007).

Whale and dolphin tourism in Tanzania offers opportunities to diversify the tourism economy, enhance conservation awareness, and support coastal livelihoods. Yet, realising these benefits fully will require strengthening governance and regulation, including codes of conduct for marine wildlife interactions and ensuring equitable benefit-sharing so that local communities receive a fair share of tourism revenues (Cagua et al., 2020). Zanzibar's dolphin tourism has, over the years, faced criticism due to unethical practices by some tour operators, such as aggressive boat pursuits that disrupt natural dolphin behavior and overcrowded tours that subject the animals to stress through persistent human contact and close-range swimming (Hafidh & Sharif, 2022; Hamed & Yahya, 2024).

Text box 50: Whale watching in Tanzania

Source: Braulik, 2023

Whale watching is a unique component of Tanzania's coastal and marine tourism, particularly around Mafia Island. In 2023, the Tanzania Whale Network recorded 168 reports of humpback whale (*Megaptera novaeangliae*) sightings, representing 524 individual whales, including 50 calves (9.5%). The whale season lasted for about 139 days (July–November), with peak sightings in August (251 individuals) and July (112). Zanzibar reported the highest number of sightings due to its active marine tourism sector and the large number of operators and residents reporting observations. Whale watching offers opportunities to diversify Tanzania's blue economy by attracting high-value tourism, creating jobs for boat operators, tour guides, and local communities, while strengthening conservation awareness.

However, challenges exist: reports in 2023 highlighted unsustainable practices, including whales being chased and harassed by speedboats and several cases of whales entangled in fishing gear or plastic waste. At least four disentanglement efforts were recorded by local fishers and conservation groups. These incidents underscore the **need for a formal code of conduct** to ensure whale watching remains safe and sustainable, protecting both the animals and the livelihoods that depend on them.

13.3.4 Yachting and sailing

Tanzania's long coastline and offshore islands offer exceptional conditions for yachting and sailing (Mbaga et al., 2024). The calm waters of the Indian Ocean, consistent trade winds, and year-round tropical climate make the country an attractive destination for both recreational sailors and organised yacht charters. Zanzibar, in particular, combines its historic Stone Town with surrounding crystal-clear waters, positioning the island as a popular stopover for yachts (Ibid.). Cultural events such as the Zanzibar International Film Festival and marine sports gatherings such as the Zanzibar Sailing Regatta further enhance the island's reputation as a premier coastal and marine tourism hub for yacht stopovers (Mbaga et al., 2024).

Yachting and sailing have become important components of Tanzania's marine tourism sector, generating economic opportunities, fostering cultural exchange, and promoting environmental awareness (Mbanga et al., 2024). With the adoption of sustainable practices, Tanzania can continue to expand this niche tourism market while safeguarding the unique marine ecosystems that underpin its long-term appeal.

13.3.5 Turtle tourism

Turtle tourism has emerged as an important strategy for conserving Tanzania's endangered marine turtles and their habitats by encouraging communities to see greater value in protecting live turtles rather than exploiting them (Sea Sense, 2025). On Mafia Island, the conservation of species such as the critically endangered hawksbill turtle (*Eretmochelys imbricata*) since 2001 has been a notable success, achieved through the combined efforts of Sea Sense, local communities, and the Mafia Island Marine Park (Tanzania tourism, 2025). Beyond providing employment in guiding, monitoring, and ecotourism activities, turtle conservation generates wider benefits by supporting community livelihoods, strengthening environmental stewardship, and reinforcing Tanzania's coastal economy (Sea Sense, 2024) (see Text box 51). See also Text box 46 for an emerging threat to sustainable turtle tourism.

Text box 51: Turtle conservation and tourism in Tanzania

Source: Sea Sense, 2024

Tanzania's 1,424 km coastline is an important nesting ground for endangered marine turtles, particularly green turtles (*Chelonia mydas*). In 2024, Sea Sense Conservation Officers operating across 35 coastal villages recorded 192 nests and successfully protected 22,096 hatchlings, supporting their safe journey into the ocean. Marine turtle tourism attracts thousands of visitors each year, who come to watch nesting and hatching events along the beaches of Mafia, Pangani, Kigamboni, and other districts. This generates revenue through entry fees, snorkel taxes, and participation in eco-tours, while also supporting surrounding businesses such as guesthouses, restaurants, markets, and handicraft shops. Data collected by Sea Sense shows that **visitors' contributions provide benefits to both conservation and community development, with funds reinvested into monitoring, awareness campaigns, and sustainable livelihood programmes.**

Conservation-linked enterprises are also making direct economic contributions. For example, the closing of parts of the reef to fishing resulted in allowing the fish population to recover and produced 3.69 tonnes of fish worth USD 7,500 in 2024, showing how conservation action translates into food and income security. Community eco-credit schemes launched in Mkuranga District provided initial seed capital of TZS 2 million (approx. USD 799) per group, with savings increasing by up to TZS 1 million (approx. USD 400) within a year. The social impact of turtle conservation is equally significant: across Mafia Island, Lindi, Pwani, and Tanga, women's groups are actively managing resources and leading conservation activities while building new income streams. Overall, **wild turtle conservation and tourism in Tanzania demonstrate the potential of nature-based solutions to deliver multiple benefits.**

13.4 Challenges facing coastal and marine NBT in Tanzania

- **Climate change impacts:** Climate change threatens coastal and marine NBT in Tanzania through rising sea temperatures, coral bleaching, and shifting fish populations, amongst others. These changes reduce the quality of diving and snorkelling experiences, affect sport fishing yields, and alter migration patterns of dolphins and whales, undermining both biodiversity and tourism-dependent livelihoods (Kadagi et al., 2022).
- **Infrastructure and investment limitations:** Many coastal and marine NBT destinations lack reliable transport, accommodation, safe facilities, and skilled labour, limiting tourism growth and the quality of the visitor experience (CAG, 2023; Mbaga et al., 2024).
- **Seasonality and limited product diversification:** Coastal and marine NBT remains highly seasonal, with peak activity during specific months, e.g. dolphin watching (Kadagi et al., 2022). This narrow product base restricts the sector's resilience, as fluctuations in tourist arrivals or external shocks can have immediate impacts. The lack of diversification also limits the creation of year-round jobs for coastal communities, reducing the sector's potential to deliver sustainable economic benefits (Kadagi et al., 2022; URT, 2019).
- **Overtourism:** Tanzania's coastal and marine NBT, particularly in Zanzibar, is experiencing steady growth, which is a positive sign for the economy. However, this growth also brings with it the challenge of potential overtourism. If visitor numbers continue to rise without proper management, the pressure on marine ecosystems could become significant. Coral reefs and seagrass beds may suffer from overuse through activities such as snorkelling, diving, and boating, while increased tourist traffic could, if not well managed, lead to increased pollution from waste and plastics entering the ocean.
- **Low community engagement and benefit-sharing:** Coastal communities often report exclusion from decision-making and unequal access to economic benefits from coastal and marine NBT, resulting in weak support for conservation initiatives (Katiro et al., 2017; Mbaga et al., 2024).
- **Coral mining:** Coral mining is a major threat to Tanzania's reef ecosystems. Coral mining leads to habitat destruction, reduced biodiversity, and weakened coastal protection. The practice also undermines tourism activities such as diving and snorkelling, while degrading fish breeding grounds critical for artisanal fisheries (Mai, 2024).

- **Turtle aquariums:** The rapid rise in tourism in Zanzibar has fueled a troubling surge in unregulated “turtle aquariums” across the islands, which is resulting in illegal capturing of turtles in the wild and unethical practices. Relevant codes of conduct, as well as tourist awareness campaigns, are needed to manage this potential threat to biodiversity as well as the tourism brand of the country.
- **Plastic pollution:** Plastic pollution is a rapidly growing threat to Zanzibar and mainland Tanzania, harming its beaches, marine ecosystems, and long-term viability as a tourism destination. Much of the waste entering the sea comes from single-use plastics such as bottles, food packaging and disposable utensils, heavily linked to tourism and hospitality activities particularly in Zanzibar. Studies show that nearly half of all litter at key coastal tourism sites is plastic. Weak waste-management systems, limited segregation, poor recycling infrastructure and insufficient institutional capacity, result in plastics often being dumped, burned, or washed directly into the ocean. Coastal hotels that install artificial turf on beachfronts contribute to microplastic pollution as the synthetic grass steadily sheds plastic fibers that enter the sand and marine ecosystem. The environmental impacts are severe, amongst others, sea turtles, fish and other marine species ingest or become entangled in plastic debris (Maione C. 2021; Mikkelsen et al., 2025).

13.5 Opportunities for coastal and marine NBT in Tanzania

- **Rich marine biodiversity and unique ecosystems:** Tanzania’s extensive coastline and diverse habitats, including coral reefs, mangroves, and seagrass beds, provide attractive sites for coastal and marine NBT such as scuba diving, snorkelling, and wildlife watching (Kadagi et al., 2022).
- **Community-based tourism engagement:** Involving local coastal communities through beach management units and other community initiatives helps ensure benefits of coastal and marine NBT are distributed equitably to locals while promoting conservation and stewardship (Katiro et al., 2017; Mbagi et al., 2024).
- **Promotion of sustainable tourism practices:** To ensure the long-term benefits of coastal and marine NBT, it is essential to encourage and enforce sustainable tourism practices. This includes educating tourists and local businesses about the importance of minimising environmental impacts and supporting conservation efforts.
- **Promote Public-Private Partnerships for marine conservation:** Strengthening collaboration between government, private sector actors, and local communities is essential to safeguard Tanzania’s coastal and marine biodiversity (Mbagi et al., 2024). Public-private partnerships can mobilise resources, enhance management capacity, and foster innovative conservation solutions that ensure the long-term sustainability of coastal and marine NBT.

Tanzania’s coastal and marine NBT is an important pillar of the country’s blue economy, offering pathways for sustainable growth, biodiversity conservation, and community empowerment. The sector’s rich natural assets from coral reefs and mangroves to the globally recognised islands of Zanzibar, Pemba, etc. continue to attract visitors and investment, generating livelihoods and supporting local enterprises. Yet, to sustain this momentum, greater attention is needed toward improving infrastructure, strengthening policy coordination, enforcing sustainability standards and ensuring that tourism benefits are equitably shared with coastal communities. By prioritising inclusive governance, equitable benefit-sharing, environmental stewardship, and innovation in tourism development, Tanzania can position itself as a leading model for sustainable coastal and marine NBT in Africa.

*See also a separate detailed case study on Mafia Island Marine Park for more information.

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14

Opportunities and challenges in the WIO region

The WIO region is high in biodiversity, as well as endemism, offering many opportunities for diversifying coastal and marine nature-based tourism. Broadly, coastal and marine NBT presents opportunities to increase local incomes, strengthen and enhance local infrastructures, contribute to the wellbeing of local communities (Dwyer, 2018) as well as contribute more broadly to the national, as well as regional, economy.

Below is a list of some of the opportunities for the WIO region identified during the case study research:

14.1 Opportunities

- **Blue economy strategies as policy drivers:** Coastal and marine NBT is increasingly being embedded within national blue economy strategies across the WIO countries, positioning it as a key driver of sustainable development. For example, Seychelles has committed 30% of its waters to MPAs, creating a strong foundation for conservation-linked tourism. Somalia's Blue Economy Strategy explicitly prioritises the growth of NBT as a pathway for livelihood creation and economic diversification, while Mauritius has set a target of deriving 26% of its blue economy value from tourism by 2030. These policy frameworks not only demonstrate political commitment but also create enabling conditions for investment, regional cooperation, and the development of innovative financing mechanisms, such as blue bonds and blue carbon projects. Through the alignment of coastal and marine tourism with broader blue economy goals, WIO countries are laying a foundation for a more resilient and inclusive coastal and marine NBT sector.
- **High marine biodiversity and iconic species:** The WIO is home to extraordinary coastal and marine biodiversity, including iconic species such as whale sharks, dugongs and manta rays in Mozambique, turtle nesting sites along Tanzania's coasts, and the marine big 5 experiences in South Africa. These assets represent a critical opportunity for coastal and marine NBT development, as they provide a strong foundation for positioning the region as a premier destination for nature-based tourists. Capitalising on this biodiversity through sustainable NBT initiatives, the region can unlock economic opportunities while strengthening incentives for the conservation of its coastal and marine ecosystems.
- **Community-based and cultural tourism models:** Community participation is central to the success and sustainability of coastal and marine NBT in the WIO region. Engaging coastal communities through initiatives such as beach management units, community-based tourism models, and co-management frameworks, ensures that economic benefits are equitably shared while fostering local stewardship of coastal and marine ecosystems. Successful examples across the region demonstrate this potential: in Kenya, the Wasini Women's Boardwalk channels 40% of NBT revenue directly to local households, while in Seychelles, the Locally Empowered Area Protection (LEAP) model promotes community-led stewardship of marine sites. Similarly, in Somalia, opportunities exist to integrate community-based tourism with the country's rich coastal cultural heritage, e.g. historic walking tours in Mogadishu, traditional dhow sailing, and local culinary experiences. This diversifies visitor experiences while empowering communities, enhancing conservation outcomes, and supporting sustainable livelihoods that anchor NBT within local development priorities.
- **Untouched and underdeveloped islands:** Countries such as Somalia and Comoros remain relatively untouched by large-scale tourism, with extensive stretches of pristine coastline and diverse coastal and marine ecosystems. Unlike more established islands where coral reefs and beaches are experiencing growing ecological strain, these present a unique opportunity to introduce sustainable coastal and marine nature-based tourism from the outset. They also offer the opportunity to diversify NBT products and services in the region in order to establish wider tourism circuits in the WIO region.
- **Sustainability-related opportunities:** Kepher-Gona et al. (2024, pp 45-47) highlight the following opportunities (please see their full report for more opportunities and detail on each of these):
 - Tourists are increasingly becoming agents of change in the locations they visit, due to their desire for more sustainable local products and destinations. This provides an opportunity for WIO countries to diversify products and services to meet this demand.
 - Growing recognition of the necessity of incorporating environmental sustainability and climate action into economic development, across sectors (including tourism) by government policymakers, technocrats and the private sector.
 - Spatial planning tools and approaches, such as Marine Spatial Planning (MSP) and Integrated Coastal Zone Management (ICZM), can help tackle management issues related to the use of oceans and seas, allowing a better allocation of coastal zones economic and leisure activities to avoid conflicts and create synergies among sectors.
- **Regional product and service diversification:** There is potential to create a WIO nature-based tourism marketing platform or association, which could provide tourists with more information on tourism circuits in the region where they could participate in diverse NBT activities, broadening value chains and tourism multipliers in the region. Overall product and service diversification within WIO countries, as well as between countries, would also extend tourism-related value chains and multipliers and offer tourists with different options to extend the length of their stay and or visit multiple times.
- **Humpback whale migrations as a regional product:** Seasonal humpback whale movements are a unifying natural asset across the West Indian Ocean. Countries such as Réunion, Madagascar, Kenya, Mozambique and South Africa all attract visitors for whale-watching, with peak sightings often occurring in overlapping months. This creates an opportunity to market the migration as a shared regional experience, where tourists can follow different stages of the whales' journey across borders. Coordinated whale tourism circuits would not only diversify visitor experiences but also strengthen regional cooperation in coastal and marine NBT development and conservation.
- **Innovative financing:** There is the opportunity to utilise innovative blue financing to fund coastal and marine NBT, as well as the protection of the natural resource asset base on which it is based for example through blue bonds e.g the Seychelles Blue Bond.
- **Opportunities for greater regional tourism integration** exist in the areas of improving regional air connectivity, cooperation in capacity building and workforce development, collaboration in product packaging, and joint marketing (Dwyer, 2018; World Bank Group, 2013).

- **Regional integration and joint marketing:** The pooling of marketing resources in the region could assist with raising the region's profile in key source, as well as emerging, markets. This could be supported by the establishment of a WIO Tourism Association (or Community of Practice) to lead these efforts. Collaboration on data collection related to coastal and marine NBT in the WIO region is essential in order to support data-driven decision- and policy-making and would also be useful in terms of guiding and providing data for marketing efforts. The **"Vanilla Islands" organisation is a marketing group** which was created in 2010 when tourism professionals realised that the promotion of Reunion, Mauritius, Madagascar, Seychelles, Comoros and Mayotte as a tourist destination could only be achieved through the pooling of resources and expertise (The Vanilla Islands, 2025). This allowed for the creation of new products (combined destinations and cruises) to complement existing ones and also meet the expectations of new customers (The Vanilla Islands, 2025). It is highlighted by the Group that visiting several islands on a single trip reduces the environmental impact and helps to protect the fragile ecosystems on which coastal and marine tourism depends (The Vanilla Islands, 2025). Collaboration of this nature provides a massive opportunity for the WIO region, though regional air travel currently makes this expensive and needs to be addressed to promote broader tourism circuits in the region.
- **Regional tourism circuits:** Opportunities exist to create regional tourism circuits which encourage tourists to visit a number of WIO countries for different NBT activities. Joint marketing efforts could be used to promote these and leverage joint resources to maximise impacts and promote the unique selling points of different sites and countries. The Vanilla Islands initiative provides a good example of what is possible.



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14.2 Challenges

There are, however, also challenges confronting the sustainable development of coastal and marine NBT in the WIO region including, amongst others, a lack of (or inappropriate) planning for coastal area development and management, governance issues, limited innovation, access to finance for enterprise development, absence of data for monitoring, and, the severe threats posed to coastal destinations from advancing climate change (Rogerson, 2020). The need for economic inclusion and ensuring a greater spread of the benefits of tourism growth to local communities, especially for marginalised groups, is also a critical policy issue (Rogerson, 2020).

Within the Indian Ocean Region there is a lack of regional cooperation for example in the areas of product development, multi-country packaging, intra-regional travel, promotion, and cross-cutting issues (including training, quality assurance, and environmental standards) (Dwyer, 2018). The Indian Ocean Commission (IOC) has emphasised that regional tourism integration is a priority, but limited resources—financial and political, have been committed to policy, partnerships and sector promotion despite the economic rationale for greater regional cooperation (Leijzer & Denman, 2013 in Dwyer, 2018).

A key challenge for Small Island Developing States (SIDS) is a heavy reliance on coastal and marine tourism, which can be impacted by numerous socio-economic factors, e.g. COVID-19 pandemic, the global financial crisis, etc., but also environmental factors, e.g. climate change, hurricanes, etc.

Below are further challenges identified for the WIO region through the case study research:

- **Lack of policy coordination and weak governance:** Across the WIO region there are issues related to a lack of policy coordination at national and regional levels. Issues related to weak governance and enforcement of existing legislation also hamper the sustainable development and management of coastal and marine NBT and conservation in the region.
- **Limited institutional capacity and budgetary constraints:** Institutional capacity related to coastal and marine conservation and the management of coastal and marine NBT is lacking in some countries, as is the capacity to coordinate these across sectors and institutions. This is often as a result of budgetary constraints, but also a lack of access to, and our knowledge of, the appropriate capacity building. Budgetary constraints also impact enforcement, data collection, infrastructure development and other requirements for developing a sustainable coastal and marine NBT sector.
- **Limited socio-economic data collection:** Very little consistent, comparable, robust data was found related to coastal and marine NBT activities in any of the countries in the WIO region. Without accurate data it is difficult to understand and communicate the impacts of coastal and marine NBT, or its value to stakeholders, resulting in it frequently not being included in policy- and or decision-making and where it is, it is not accurately captured - *"We cannot manage what we can't measure"*.
- **A lack of research of tourism impacts on environment, economy and local communities:** In order to sustainably manage NBT tourism, it is important to understand tourism's impacts, both positive and negative, on the environment, economy and local communities.
- **Infrastructure and accessibility limitations:** Operators and host communities cannot reap the economic benefits of a thriving coastal and marine tourism industry or develop their local economies without adequate transport connections to and between countries (Dwyer, 2018), given the reliance on air access to a number of the countries and poor road networks between others. The high cost of regional flights discourages regional travellers, as well as international travellers from visiting more than one destination in the region. Infrastructure development in the WIO presents a dual challenge for coastal and marine NBT. On the one hand, many prime destinations, such as Toliara-Anakao in Madagascar and Somalia's coastline, remain largely inaccessible due to limited roads, marinas, or basic tourism facilities, restricting local communities and countries from fully benefiting from NBT opportunities. On the other hand, poorly planned or rapid infrastructure development in more accessible areas has led to significant environmental pressures. For example, in Malindi (Kenya), resort and beachfront development has encroached on mangroves and coral reefs, reducing natural coastal protection and impacting local fishers. In Nosy Be (Madagascar), luxury resorts and marinas have damaged coral and seagrass habitats, while in Zanzibar, inadequate waste management from tourism infrastructure has caused nutrient pollution, harming marine life. This two-fold reality highlights the need for carefully planned, sustainable infrastructure that balances accessibility with the protection of coastal and marine ecosystems and local livelihoods.
- **Coastal and marine ecosystem degradation:** Habitat disturbance, plastic pollution, beach erosion, illegal fishing, sand harvesting, overtourism, as well as numerous other threats are leading to extensive coastal and marine ecosystem degradation, destroying the resource asset base on which the blue economy and specifically NBT depend. Investment in monitoring and managing these threats and investing in the conservation of these ecosystems is essential to the long-term sustainability of coastal and marine NBT.
- **Conflict with fishing communities:** tourism demand for fish and seafood could result in price increases which could place these protein sources out of reach of local communities and create unfair competition and pressure on pelagic and reef species. Sustainable management of fisheries resources is essential.
- **The "Invisible Burden" of tourism:** This refers to the hidden costs for local people from tourism, for example a higher cost of living in popular tourism destinations, amenities for residents displaced by tourism, etc. For more information see Epler-Wood et al. (2019).
- **Threat of foreign development and leakage:** in order to ensure that the benefits of coastal and marine NBT are retained within a country, it is important to have up-to-date, robust tourism management plans, which are enforced, with implementation monitored to ensure long-term sustainability and to prevent or at least minimise leakage.
- **Climate change vulnerability:** Coastal and marine NBT in the WIO is highly vulnerable to climate change, as rising sea levels, coral bleaching, and extreme weather events threaten both ecosystems and infrastructure. For example, Mauritius experienced accelerated shoreline erosion, reducing the attractiveness and accessibility of beaches. In Madagascar, up to 40% of prime dive sites could be lost by 2040 due to warming waters and coral degradation, while Mozambique's Cyclones Idai

and Kenneth devastated coastal infrastructure and damaged coral reefs. These environmental changes not only diminish biodiversity and the quality of tourist experiences but also undermine investor confidence and the economic viability of coastal and marine tourism. Without appropriate adaptation, mitigation and resilience measures, climate impacts could limit the growth and sustainability of NBT across the region (and globally).

- **Uneven and inconsistent benefit-sharing:** A key requirement for sustainable coastal and marine tourism development is for the local communities to benefit from the industry: helping to alleviate poverty, improve livelihoods and encourage better management and conservation practices by the local communities (Dwyer, 2018). In many WIO destinations coastal communities, however, receive only a small fraction of the economic benefits from NBT, despite being closest to, and conserving, valuable coastal and marine assets. For example, in Nosy Be, Madagascar, local residents earn less than 20% of tourism revenue, while in Mozambique and Seychelles, external investors dominate the sector. This unequal distribution limits opportunities for local development and can undermine community support for conservation. When communities don't receive benefits from tourism, they are frequently triggered to engage in activities such as coral mining, overfishing, or poaching to sustain livelihoods. Ensuring more equitable benefit-sharing is therefore critical not only for social inclusion but also for the long-term sustainability of coastal and marine NBT. See Ndivo (undated) for more information on equity related to coastal and marine tourism and see Text box 52 for more related to the inclusion of informal tourism stakeholders. Gossling (2006), however, highlights that high leakages of tourist expenditure occurs through the frequently high import content of tourists' consumption bundle as a result of a narrow production base in many coastal and marine destinations.
- **Market dependence and vulnerability:** Coastal and marine NBT in the WIO remains highly dependent on international visitors, creating significant economic vulnerability. Madagascar, for example, relies on French and German visitors for nearly 70% of arrivals, while Mozambique's coastal tourism is dominated by South African and European visitors. This narrow market base means that any disruption, such as global pandemics (COVID-19), economic downturns, or changes in travel preferences, can easily translate into sharp declines in revenues, jobs, and community livelihoods. Such dependence also limits the sector's resilience and highlights the need for diversification into regional and domestic markets, as well as product innovation and diversification of products and services, to build a more stable, resilient and sustainable tourism economy.
- **Skills gaps:** The coastal and marine tourism sector often has difficulty in attracting or maintaining enough skilled personnel to work in its various sectors due to both seasonality and lack of career opportunities, which can lead to problems in service quality and erode destination competitiveness (Dwyer, 2018).
- **Security and perception challenges:** Persistent insecurity continues to constrain the growth of coastal and marine NBT in parts of the WIO region. In Somalia, the legacy of conflict and ongoing security concerns deter international visitors, regardless of the country's marine tourism potential. Similarly, northern Mozambique's Cabo Delgado insurgency has made once-prized dive sites inaccessible, disrupting tourism operations and displacing investment. Beyond physical risks, even the perception of insecurity significantly shapes traveller choices and investor decisions, often discouraging engagement with destinations long after conflicts subside. This creates a cycle where limited tourism investment further delays the sector's recovery and reduces opportunities for local communities to benefit from nature-based tourism.

The below challenges are related specifically to coastal tourism in cities in the WIO region, with many relevant to all coastal and marine NBT in the region (taken from WIOMSA and UN-Habitat, 2021, pp 14):

- External shocks such as terrorism and pandemics have challenged the WIO tourism industry;
- Ensuring distribution of tourist income in WIO countries down to local communities;
- Municipalities need to collect tourist revenue but also support local businesses;
- There is a need for improved livelihood training for youth and disadvantaged groups;
- There is a need to tackle sex tourism which is largely driven by international visitors;
- A need for stronger land-use planning and development control of tourist developments;
- Direct and indirect tourism-driven pollution and other damaging activities must be tackled;
- There is an opportunity for national and local marine protected areas and ecotourism to protect and enhance marine habitats.

Kepher-Gona et al. (2024, pp 44-45) highlight the following challenges (please see their full report for more detail on these):

- Lack of cohesion and integration in tourism policies at the different levels (international, national, regional and destination levels) and between different sectors (e.g. tourism and environmental policies).
- Limited collaboration and a lack of medium and long-term vision and commitment from stakeholders.
- Inefficient resource use, especially when resources are primarily allocated to marketing rather than sustainable product development and management.
- Lack of structures to enable collaboration between businesses, governments and other stakeholders.
- A governance gap challenges the development of a more sustainable blue economy when new actors enter the sector
- A limited awareness and understanding among tourism stakeholders of sustainable practices and their benefits.
- High costs faced by tourism businesses seeking to implement sustainable practices.
- Limited financial incentives and varied options available for accessing funding that could encourage and support tourism businesses to adopt sustainable practices and also to mitigate the potential negative effects of seasonality on their financial capabilities.
- The limited access of tourism entrepreneurs to information, resources and technical expertise on sustainable solutions tailored to their context, leading to possible reluctance to adopt sustainable practices.
- Carbon emissions and air pollution from energy consumption and inbound travel.
- Energy, water and food waste if not sustainably managed.

Please also see Kepher-Gona et al. (2024, pp 33-35) for a full list of the positive and negative environmental, social and economic impacts of blue tourism.

Text box 52: Beyond the shoreline: Recognising informal livelihoods in the Western Indian Ocean (WIO)'s Marine Nature-Based Tourism

Author: Logistic Makoni, UNISA

Conversations on sustainable livelihoods through marine nature-based tourism (MNBT) have been ongoing for a long time across comparable destinations, both in the Global North and Global South. The current dominant narrative, however, focuses on the formally conceptualised principles of sustainability related to marine and nature-based regions and their surrounding communities (Risager-Simonsen et al., 2022). These discussions are largely framed through the lens of Global North contexts, while conversations focusing on African Western Indian Ocean (WIO) marine nature-based regions remain on the periphery (Sack & Thorn, 2024). Particularly, insights into the importance of the informal sector have not been fully incorporated into the broader spectrum of these discussions (Chukwuka et al. 2025). Evidence suggests that across the African WIO, coastal communities in these various countries and islands remain highly dependent on informal and small-scale marine activities that are unevenly represented in formal policies.

In Kenya, for instance, 80% of the marine landings are produced by coastal and marine small-scale fisheries (SSFs). About 14,000 fishers operate in 3,000 vessels around 213 sites (University of Nairobi Maritime Centre, 2023). Overall, SSF in Kenya accounts for over USD 7 million annually and contributes to food security for 80% of the rural coastal communities, such as in Mombasa, Kwale, Lamu, and Kilifi (University of Nairobi Maritime Centre, 2023). Tanzania is not so different, with the fisheries sector largely dominated by the SSFs. Here, the artisans are largely neglected by both the Beach Management Units (BMUs) and the Marine Parks management in planning and management of the marine areas (WIOMSA, 2023). This situation mirrors the Mozambican coastal areas, where the country relies on about 90% of the artisanal production of total fisheries, which is responsible for sustaining over 800,000 coastal households characterised by a fisheries-dependent poverty profile (WIOMSA, 2022). This shows how the informal economy anchors locals' sustenance. Similarly, in Madagascar, about 600,000 people depend on fisheries for survival (World Bank, 2020; 2022). In Somalia, while the country is home to the longest coastline on the continent, the coastline is largely artisanal and under-governed (Federal Republic of Somalia, 2024). Evidence from South Africa, however, shows a different dynamic, with the country having a more formal approach to integrating the marine informal economy (Peer, Muhl, Janna, Brown, Zukulu & Mbatha, 2022). This is at a small scale; there is evidence of SSFs that are gradually transitioning into formally recognised operators under the 2012 Small-Scale Fisheries Policy. So far, since 2024, about 12,000 fishers have managed to gain a formal recognition status and have gained access to 377 vessels across the country. Despite this, there are still gaps regarding the formal recognition criteria (GroundUp News, 2024).

Looking into the MNBT of this region, a similar pattern of informal players' neglect continues to manifest. These actors include, *inter alia*, beachfront craft/curio traders, unlicensed local tour guides, small boat and canoe operators, informal food vendors, street vendors, fish traders and unlicensed photographers (Makoni & Mearns, 2025). These players are tightly woven into the local value chain that aligns with the destination branding and conservation, but they remain invisible in formal structures of planning and development, with their contribution remaining unaccounted for (Rogerson & Rogerson, 2025).

In Kenya, despite the Multi-Stakeholder Platforms (MSPs) and the blue-economy planning recognising the primacy of coastal tourism and the significance of incorporating locals and BMUs, the practical implementation of informal players' integration strategies remains sporadic (Kaaria & Chelimo, 2022).

In Tanzania, the Marine Parks and Reserves Unit (MPRU) management shows promise for inclusive integration and benefits for the local communities (WIOMSA, 2023). Mozambique and Madagascar cases present similar dynamics—there is a high artisanal dependence along the two countries' MNBT, with a limited market infrastructure and social protection (World Bank, 2020). These conditions exacerbate the informal players' vulnerability to such things as changes in demand and climate change. Regarding the island states, there are different dynamics of the interplay of tourism and informal players in the MNBT.

In Seychelles, the Fisheries Transparency Initiative (FiTI) promotes transparency, though there is a huge omission in recording the current figures of the informal players in areas such as economic contributions, tourism contributions, and employment creation in the MNBT (FiTI, 2023). The informal players in Mauritius coexist with mass tourism in a highly informal beach economy where their operations are hindered by zoning regulations and licensing. In the case of Somalia, there is insufficient governance that affects the MNBT linkages, despite the substantial potential (Food and Agriculture Organization (FAO), 2025).

In South Africa, despite the attempts to formalise the activities within the MNBT networks and activities, the informal players continue to face integration challenges, even in tourism-rich areas (Department of Forestry, Fisheries, and the Environment, 2023).

Across other parts of the world, particularly in the Global North, MNBT largely adopt four models of management and integration of informal players;

1. **Benefit-sharing:** this is a multistakeholder approach in which the benefits of tourism and conservation in these areas are equitably shared among all affected stakeholders, including the informal players and the locals.
2. **Co-management:** this approach integrates all stakeholders, including the locals and the informal service providers.
3. **Co-produced monitoring and enforcement:** this is an approach that allows the locals to be able to protect the area they depend on and, like the above factor, determine the management principles that are convenient for their operations.
4. **Shared rights for coastal people:** in this approach, the locals and informal/ small-scale operators are equally part of the beneficiaries of these areas instead of being complementary or being on the periphery.

In Belize, for example, the territorial user rights for fisheries (TURFs) are granted to small-scale fishers. This programme is reported to enhance the small-scale operator's engagement while it is also being embedded within the national strategy to expand the marine protected areas (MPAs) (The Commonwealth, 2021). In Australia, the management framework of the Great Barrier Reef integrates the Traditional Use of Marine Resources Agreements (TUMRAs), which are responsible for recognising and accrediting the Traditional Owners' sea-country management plans. The Eye on the Reef programme complements this mechanism in which the small-scale tourism operators and tourists contribute to the ecological data (Reef Authority, 2025). In the Mātaītai and Taiapure areas in New Zealand, there is a huge emphasis on customary law, in which the Māori authority is institutionalised in the governance of the MNBT (Ministry for Primary Industries, 2025). In this approach, the Māori communities are empowered to establish local bylaws that regulate resource usage in alignment with their customary practices. This helps in incorporating the small-scale operators into the tourism value chains of the area.

The global best practices examples are good lessons for the African WIO countries' efforts to integrate the informal actors into the tourism development of MNBT. A key commonality amongst the Global North examples is that the informal players are not treated at the margins; rather, they are equally included in the formal structures of planning and regulation (Nowakowski et al., 2023). The case of the Global North suggests that when the rights, responsibilities, and benefits of managing MNBT are inclusively factored in, compliance and stewardship improve, cultural governance strengthens, and the biodiversity conservation within those areas is enhanced. Such actionable benchmarks are crucial for Global South destinations, particularly the MNBT in the African WIO regions.

As a result, it is recommended that a policy to mainstream informal livelihoods in MNBT in African WIO countries be designed. Such a policy may include, amongst others, cooperative registration and simplified permits for small-scale marine tourism operators. Given the limited data that exists on the contributions of these informal players, it will be beneficial to establish quarterly or annual data of the informal players' performance and contributions to the MNBT tourism. Such data would be published as coastal socio-economic dashboards in which the input of the informal sector is officially captured and traced. It is also encouraged that this policy contains guidelines for de-risking livelihoods against unforeseen shortcomings, such as climate shocks or undertourism periods. One of the ways to do that is to provide a fixed share of the tourism revenue in the MNBT for informal social protection. Also, MNBT may benefit from digitising the informal economy to promote market power, sufficient reporting, and enhance data-based decision-making that will help in achieving sustainability. In addition, co-creating MNBT regulations that enable livelihoods and populating the Seychelles' example of financing at scale using blue bonds would also contribute to the successful management of the MNBT in African WIO regions. Overall, **this approach is vital for broader conservation efficiency, more resilient tourism value chains, and inclusive growth.**

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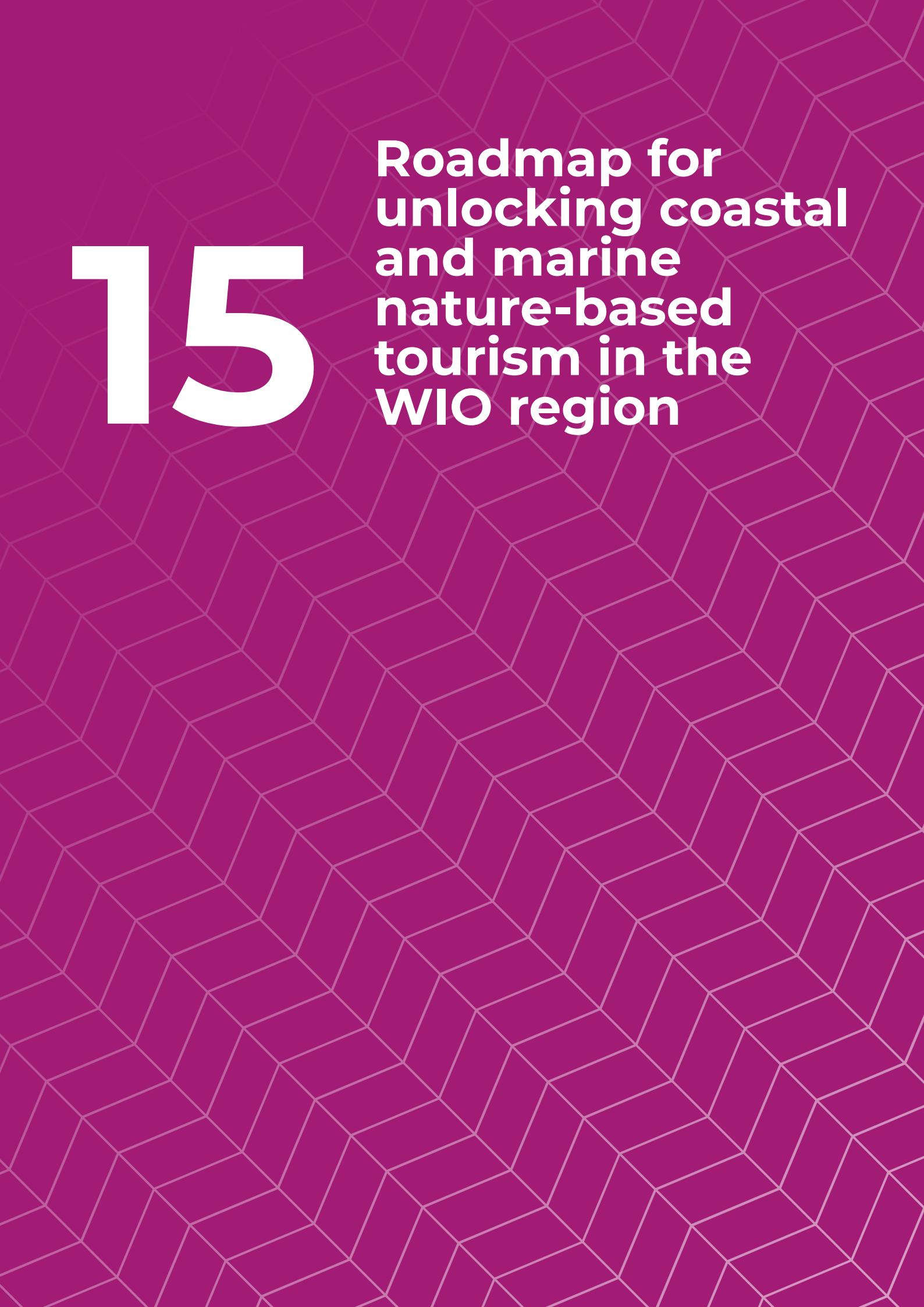
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15

**Roadmap for
unlocking coastal
and marine
nature-based
tourism in the
WIO region**

This section is based on the country case study work in this report as well as informed by the WIOMSA WIO regional tourism workshop in 2024, Kepher-Gona et al.'s (2024) report on blue tourism in the WIO region and the Roadmap for Africa's Wildlife Economy (Snyman et al., 2021). The steps listed below are not sequential, though ensuring that there are the correct policy, legal and regulatory frameworks in place is often needed before there can be any sustainable and effective unlocking and/or growth of the coastal and marine NBT sector.

15.1 Step A: Strengthen policy, legal and regulatory provisions governing natural resources and related to nature-based tourism

In order to unlock and grow coastal and marine nature-based tourism in the WIO region it is essential that the appropriate policy, legal and regulatory provisions are in place to enable and empower stakeholders to engage in, and benefit from, the sector.

15.1.1 Integrated policies and governance

- Policies and legislation need to allow land/property and use rights to local stakeholders in order to allow them to benefit from natural resources, providing them with an invested interest in the conservation of these resources over the long-term.
- In many cases, the harmonisation of existing policies combined with stronger leadership and public sector incentives to develop an enabling regulatory framework are required, rather than new/more/different policies (Snyman et al., 2021).
- There need to be multi-level blue tourism strategies developed at regional, national, and local scales to align sustainability targets with marine spatial planning and environmental conservation.
- The promotion of policy cohesion across sectors such as environment, tourism, fisheries and transport through multi-agency collaboration and stakeholder networks is also required as well as the strengthening of land-use planning, enforcement of development controls on tourist sites, and the establishment of marine protected areas to mitigate pollution and habitat loss (see for example a separate Mafia Island case study published by ALU SOWC)..
- Supportive and enabling policy and legislation is also required to ensure ease of doing business, transparency, accountability and general good governance at local and national levels, that would then encourage private sector investment.
- Strengthened public sector capacity is also required to effectively and efficiently implement existing policies to facilitate sustainable coastal and marine NBT.

15.1.2 Equitable benefit-sharing policies and programmes

- As part of the overarching regulatory environment it is important to have clear policies and programmes to promote equitable benefit-sharing among stakeholders, particularly local communities (see Snyman et al, (2023) for an overview of tourism-revenue sharing in Rwanda and examples of best practice).
- A good legislative and policy framework that supports a thriving wildlife economy, which would support coastal and marine NBT, includes the following (Snyman et al., 2021, adapted from pp 19);
- A clear centralised listing or outline of all coastal and marine NBT activities available/allowed;
 - A framework for proprietary rights in wild resources and how the various players hold and exercise those rights;
 - A simple, clear, and linear permitting system for all user rights;
 - A supportive framework for the participation of communities as equitable partners and players in coastal and marine NBT;
 - A supportive structure for the participation of the private sector; and
 - A clear framework for the roles, rights, and responsibilities of all stakeholders.

15.2 Step B: Protect the asset base

As with all other businesses, there is a need to invest in, grow and protect the resource asset base on which all coastal and marine NBT is based: the ocean and surrounding coasts. This involves protecting resources through conservation but also protection through mitigating damage, including through pollution, climate change, etc.

15.2.1 Resilience and environmental protection

- Build resilient networks via observatories, forums, and risk management strategies addressing climate change impacts such as coral degradation.
- Promote destination stewardship by partnering public, private, and community sectors to preserve heritage and balance tourist needs with environmental health.
- Advance monitoring and evaluation schemes, ecotourism networks, and early warning systems for reliable data collection and to promote sustainable practices.
- Linked to Step A, effective policy and regulations need to be in place to mitigate the impacts of pollution, climate change, etc. and there needs to be monitoring and enforcement of this.
- Advocacy against unsustainable tourist and tourism business behaviours (e.g. coral removal and littering) as part of a 'leave no trace' campaign (WIOMSA & UN-Habitat, 2021).

15.2.2 Invest in the resource base and its maintenance

- Governments, as well as other stakeholders, need to invest in the protection, maintenance and enhancement of the asset resource base.
- Citizen science projects can be used to support this through engaging citizens in data collection and through this also raising awareness about coastal and marine conservation (see Text box 17 on the Attitude Foundation work in Mauritius). Community-led stewardship programmes have also been shown to be successful, for example the Vezo community-led stewardship in Madagascar (see Text box 15).

15.2.3 Sustainable tourism management

- Ensure effective visitor and tourism operation management in all coastal and marine destinations, as well as ongoing monitoring and evaluation of sustainability practices related to waste, energy and water management, community engagement, employment practices, etc.

15.2.4 Conservation and community incentives

- Increase offering of effectively-priced tourism experiences where profits are re-invested into conservation efforts (WIOMSA & UN-Habitat, 2021).
- Adopt tax incentives for businesses reinvesting in conservation and communities.
- Through effective and equitable benefit-sharing programmes ensure that local communities are incentivised to conserve the asset resource base.

15.3 Step C: Improve the overall business environment

In order to grow and maximise the positive socio-economic and conservation impacts of coastal and marine NBT, **it is important to create an enabling business environment that promotes and encourages private sector investment, as well as enables communities to develop and grow tourism businesses and/or related tourism value chains.**

15.3.1 Support to local SMMEs

- A 'One-stop shop' for obtaining licenses and tax relief incentives for local community businesses, especially those meeting green and coastal and marine friendly criteria (WIOMSA & UN-Habitat, 2021). See for example the establishment of the Rwanda Development Board in Rwanda (Snyman et al., 2021, pp 19).
- Business support for small and medium-sized businesses, including training and support services, loans and market research and advertising support (WIOMSA & UN-Habitat, 2021).
- Encourage hotels, resorts and operators to promote experiential tourism packages which support local communities (WIOMSA & UN-Habitat, 2021) and incorporate local tourism value chains.

15.3.2 Sustainable finance

- Establish and promote financial incentives, innovative financing options, for tourism businesses, conservation organisations, local communities, especially including small and medium-sized enterprises.
- Sustainability-linked bonds and similar conservation-linked financial instruments could be utilised to promote conservation and provide required financial resources.

15.3.3 Marketing and awareness raising

Joint and collaborative marketing campaigns such as the Vanilla Islands Initiative can increase market reach, as well as provide tourists with a diverse range of tourism products and services across a number of WIO countries.

15.3.4 Access to markets and infrastructure

- Improvement of air, water and road travel networks to ensure that tourists are able to access all destinations and activities effectively and for a reasonable price. Without access to markets, the scope and scale of a number of coastal and marine NBT activities will be limited and the benefits which are available will not be realised.
- As part of the access to markets is also the requirement of the required/appropriate infrastructure to facilitate sustainable and effective coastal and marine NBT, for example lodges, jetties, restaurants, water, sanitation and communication infrastructure.

15.4 Step D: Promote collaboration and partnerships

The coastal and marine NBT sector includes a diverse range of sectors and stakeholders, with a dynamic and complex environment. In order to succeed and promote sustainability, it is important that there is collaboration across sectors as well as amongst stakeholders.

15.4.1 Coordination between government departments

Given the complexity of the coastal and marine NBT sector and the diversity of departments, ministries, stakeholders and institutions involved, it is essential that there is coordination between government departments, with a clear strategy that provides direction, guidance and structural coordination (Snyman et al., 2021).

15.4.2 Regional cooperation initiatives

- Strengthen regional platforms under frameworks such as the Nairobi Convention and Blue Tourism Initiative for sharing best practices and policy integration.
- Prioritise multi-stakeholder partnerships to revitalise ocean governance, focusing on infrastructure resilience and science-policy interfaces.
- Drive equitable economic models that support global goals such as the 2030 Agenda and the Africa Blue Economy Strategy (AU-IBAR, 2019).

15.4.3 Public-private partnerships

- Develop country-level action plans for public-private partnerships as well as any necessary regional guidelines for this.
- Establish public-private initiatives to train local workers in the hospitality industry and create tourism training opportunities connected to businesses operating in the region (WIOMSA & UN-Habitat, 2021).
- Partner with airline and travel operators to explore the potential of community blue carbon schemes, offsetting tourist activities (WIOMSA & UN-Habitat, 2021).

Text box 53 provides information on the Great Blue Wall initiative, which illustrates the potential of regional collaboration and partnerships.

Text box 53: The Great Blue Wall: an Africa-led ocean initiative

Sources: IUCN, 2024b; World Economic Forum, 2023; Brookings Institution; 2022

The Great Blue Wall is an Africa-led initiative to create a network of interconnected coastal and marine conserved areas across the Western Indian Ocean. Led by countries including Comoros, Kenya, Madagascar, Mauritius, Mozambique, Seychelles, South Africa, and Tanzania, the initiative aims to combat climate change and biodiversity loss by creating a "living blue wall" of restored ecosystems such as coral reefs, mangroves, and seagrasses. Its ambitious goals include protecting at least 30% of the ocean, restoring 2 million hectares of critical ecosystems, and creating one million new "blue jobs" in the region by 2030. This monumental effort is designed to build resilience for the 70 million people who depend on the ocean for their livelihoods, offering a path towards a sustainable future.

The Great Blue Wall is designed to unlock the potential of a "regenerative blue economy" by catalysing political leadership and significant financial support. The initiative is actively seeking to raise unprecedented levels of funding through innovative financial instruments such as green bonds and debt-for-nature swaps. **It is estimated that the total value of marine assets in the Western Indian Ocean is conservatively valued at USD 333 billion, providing at least USD 21 billion to the regional economy each year from coastal and marine tourism, carbon sequestration, and fisheries.** By safeguarding critical habitats, the initiative provides a stable and healthy foundation for a vibrant nature-based tourism industry, ensuring that economic growth is directly tied to the health and vitality of the marine environment.

15.5 Step E: Improve transparency and data collection & the related monitoring and evaluation

In order to truly understand the value and, therefore, impact of coastal and marine NBT it is essential that there is consistent, robust, comparable socio-economic and environmental data collected related to it, which can be used to inform policy- and decision-making.

- Data collection needs to be done at a national as well as regional level to improve transparency and accountability.
- The establishment of data collection and analysis protocols and/or systems in the WIO region, which allow for the collection of comparable data over time, would support data-driven decision- and policy-making.
- Effective monitoring and evaluation systems, based on collected data, need to be in place to ensure equitable benefit-sharing and the sustainable conservation of the natural resource asset base.
- Citizen science projects can be used to support data collection while also effectively raising awareness about coastal and marine conservation.

- The establishment of local monitoring networks can also support more consistent, robust data collection, for example the Whale Shark Monitoring Network in the Seychelles (Rowat & Engelhardt, 2007).
- The establishment of national-level data collection and M&E strategies, as well as databases and a dedicated national team (or through collaboration with NGOs and/or academic institutions) to collect data would support effective long-term monitoring and evaluation, as well as understanding of the socio-economic value of coastal and marine NBT and, therefore, the natural resources on which it is based.

The types of data that would be important include:

- Levels of investment in coastal and marine conservation and the related NBT activities,
- Turnover, number of jobs, number of, and amount paid to local suppliers of goods and services by coastal and marine NBT businesses,
- Number of, and amount spent, by tourists (broken down into local, national, regional and international) on coastal and marine NBT goods and services, and
- wildlife stocks and changes over time, including hectares under conservation management and the management effectiveness of these areas.

15.6 Step F: Build the capacity of all stakeholders to engage in, manage and benefit from coastal and marine NBT

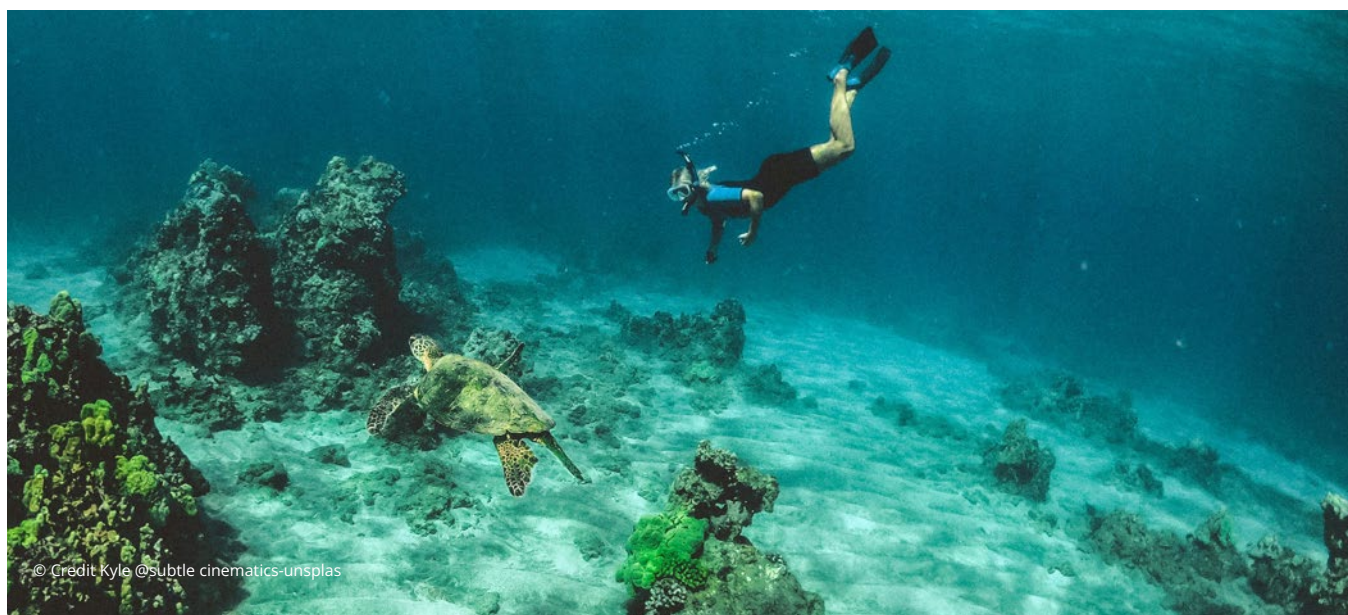
To maximise the direct and indirect impacts of coastal and marine NBT, it is necessary to ensure that stakeholders from community, government, NGOs, academia, etc., have the necessary and required skills to engage equitably in, and to effectively manage, the coastal and marine NBT sector.

- Capacity is required in terms of policy implementation, data collection and analysis, hospitality/tourism skills, sustainable management of coastal and marine NBT activities, etc.
- Government, academia, NGOs, community institutions and the private sector can all play a role in capacity building, especially through internships, sharing of lessons learned and other work experience models (Snyman et al., 2021). A study in Kenya by Ndivo (2022) reports cases of hotels with capacity-building programmes and policies on the percentage of employees to be hired from the local community, for example a five-star hotel developed a programme to train high school leavers in different areas of the hotel, then hired them. They later receive refresher courses at Kenya Utalii College (Ndivo, 2022). In another case a lodge in Amboseli National Park has a policy of purchasing at least 30% of its food from the local community, with the lodge sharing its standard purchase specifications with local suppliers to enable them meet quality specifications (Ndivo, 2022)..

15.7 Policy pathways identified by Kepher-Gona et al. (2024)

Table 9 from Kepher-Gona et al. (2024) highlights six policy pathways and the related suggested actions for growing coastal and marine tourism in the WIO. These largely align with the above recommendations for coastal and marine NBT as well. More details on each can be found in their report.

Although there is no linear or simple process to unlock and grow sustainable coastal and marine NBT in the WIO region, given already existing initiatives and institutions in the region, effective collaboration and partnerships can support the development of greater awareness in terms of the importance of coastal and marine NBT to the broader blue economy and ocean and coastal biodiversity conservation in the region, as well as improved sustainability of the management of, and benefit-sharing from, coastal and marine NBT.



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Table 9: Policy pathways

POLICY PATHWAY	SUGGESTED ACTIONS
Integrated policies and sound governance	Promote policy and strategic cohesion
	Develop a multi-level blue tourism strategy (regional/national/local levels)
	Strengthen multi-stakeholders collaboration in decision-making processes
	Foster community and stakeholder engagement in decision-making
	Encourage multi-stakeholder networks and partnerships
	Improve collaboration among marine regions
Sustainable industry practices	Support sustainable production and consumption
	Boost certification programmes
	Promote sustainable product diversification and marketing
	Support tourism businesses in overcoming barriers to change
Sustainable destination practices	Reinforce climate mitigation, adaptation and resilience in the tourism sector
	Promote destination stewardship
	Support transition communities for sustainable tourism
	Ensure appropriate visitor management in sensitive areas
	Endorse nature-based solutions (NBS) and regenerative practices
	Product diversification and marketing
Smart tourism development	Develop enabling policies for digital and smart tourism
	Ensure tools and infrastructure for smart tourism development
	Data collection and measurement
	Raise awareness on smart technologies
Research for sustainable blue tourism	Establish partnerships with universities and other research institutions
	Implement tools to support market studies
	Encourage climate change adaptation and mitigation research
	Boost capacity building activities
Finance for sustainable blue tourism	Establish and promote financial incentives
	Identify and create access to alternative financing options
	Adapt financing mechanisms for small and medium-sized enterprises
	Create partnerships with financial institutions

Source: Kepher-Gona et al., 2024

Text box 54: Possible initiatives and policies to increase the contribution of coastal and marine NBT

Source: World Bank and United Nations Department of Economic and Social Affairs, 2017

According to the World Bank and the UN Department of Economic and Social Affairs, (2017), there are various initiatives and policies which can help to increase the contribution of coastal and maritime tourism in Small Island Developing States (SIDS) and coastal Least Developed Countries (LDCs) including:

- **A need to maximise local benefits from tourism** in SIDS and other island economies through increased stakeholder engagement, while also remaining open to foreign investment and economic liberalisation.
- **Reduce leakage from small island economies** by creating local employment opportunities, improving capacity development programmes, developing local supply chains, and promoting ecotourism based on the country's specific natural and cultural heritage (i.e. promoting unique selling points and diversifying coastal and marine NBT goods and services).
- **SIDS, in particular, should address their resource management challenges** by safeguarding local resource needs against increasing demands from overtourism and by ensuring effective handling and disposal of waste generated in the tourism sector.
- Tourism development in SIDS and all coastal regions should **take into account the existing and potential impacts of climate change** and pro-actively adopt and implement adequate disaster risk reduction policies and practices to increase the resilience of the coastal and marine NBT sector.
- SIDS should **strengthen the links to local and regional markets** and develop tourism products that encourage longer stays and maximise the expenditure per person in order to account for any potential changes in transportation costs and travel patterns, particularly the cost of air transportation.
- **Adequate policies should be developed and implemented at the national and local levels to promote sustainable tourism** while focusing on developing diversified products and services to avoid over-reliance on a few tourism products in a limited number of places, which can lead to overtourism and the related negative impacts of that.
- **Core sustainability principles, such as clear land-use planning, waste management and development control policies should be incorporated into tourism policies** to address the potential negative impacts of tourism on the environment and local communities.
- **Collaboration and partnerships** between independent SIDS to effectively address key sustainability issues, as well as promote joint marketing should be encouraged.

Many of the above relate specifically to all tourism in the blue economy, but are relevant for coastal and marine NBT as well.

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Appendix A: Non-exhaustive list of policy and legislation related to coastal and marine NBT in the WIO region

Country	Policy/strategy name	Date	Sector	Source title (gov/academic preferred)	Source link	Keywords
Comoros	Moroni Declaration on the Blue Economy	2023	Blue Economy	United Nations (UN)	Link	Blue Economy, Maritime, Policy
Comoros	Great Blue Wall Initiative	2022–Present	Regional/Blue Economy	IUCN, WEF, Brookings, Regional WIO States	Link	Regional Policy, Ocean Conservation, Blue Economy, Climate, Jobs
Comoros	Comoros Emerging Plan 2030 (Plan Comores Émergent, PCE 2030)	2020–2030	National Development/Blue Economy	Government of Comoros, World Bank, UNDP	Link	Sustainable Development, Blue Economy, Tourism, Infrastructure
Comoros	Mohéli Marine Park (later expanded to Mohéli National Park)	2001–Present	Marine Protected Areas/Community Conservation	Equator Initiative, IUCN, Nairobi Convention	Link	Community Co-management, Conservation, Ecotourism
Comoros	Proposed National Marine Protected Areas (Coelacanth, Mitsamiouli-Ndroudé, Shisiwani)	2025 (planned)	Marine Protected Areas	Government of Comoros, Nairobi Convention	Link	Conservation, Biodiversity, Fisheries
Comoros	UNESCO Biosphere Reserve – Mohéli National Park	2001–Present	Conservation/International Recognition	UNESCO	Link	MAB Programme, Biodiversity, Ecotourism
Comoros	ReSea Project (Climate resilience & community empowerment)	2024	Climate/Community Development	IUCN	Link	Climate Resilience, Community, Blue Economy
Comoros	National Marine Ecosystem Diagnostic Analysis (MEDA)	2012	Marine Policy/Assessment	ASCLME/Nairobi Convention	Link	Marine Policy, Ecosystem Assessment, Governance
Comoros	CBD Scientific Information for Marine Protected Areas in Comoros	2012	Biodiversity/Conservation	Convention on Biological Diversity (CBD)	Link	Biodiversity, MPAs, Policy
Comoros	Comoros Ocean Economy Country Profile	2025	Blue Economy/Marine Policy	Nairobi Convention	Link	Blue Economy, Ocean Governance
Comoros	Itsamia Turtle Sanctuary Community Co-management	1999–Present	Community Conservation/NBT	Nairobi Convention, Freed & Granek	Link	Sea Turtle Conservation, Community-based Tourism
Kenya	Kenya's Blue Economy Agenda	2025	Blue Economy	Ministry of Mining, Blue Economy & Maritime Affairs	Link	Blue Economy, Fisheries, Maritime Transport, Renewable Energy
Kenya	Kenya Marine Fisheries & Socio-Economic Development (KEMFSED) Project	2023-2025	Fisheries/Community Development	World Bank & GoK	Link	Fisheries, Livelihoods, Tourism
Kenya	NEMA Strategic Plan 2019–2024	2019–2024	Environmental Governance	National Environment Management Authority	Link	Environmental Policy, Governance, Regulation
Kenya	Kenya Wildlife Service Strategic Plan	2024	Wildlife Economy/Tourism	Kenya Wildlife Service	Link	Wildlife Economy, Tourism, Conservation
Kenya	Kisite-Mpunguti Marine Conservation Area Management Plan	2011–2021	Marine Protected Areas	Kenya Wildlife Service	Link	Marine Protected Areas, Conservation, Fisheries

Country	Policy/strategy name	Date	Sector	Source title (gov/academic preferred)	Source link	Keywords
Kenya	Tourism Research Institute – Product Improvement & Diversification Strategy	2020	Tourism/Tourism Development	Tourism Research Institute	Link	Tourism Policy, Diversification, Market Development
Kenya	Tourism Research Institute – New Tourism Strategy for Kenya	2021–2025	Tourism/Tourism Planning	Tourism Research Institute	Link	Tourism Policy, Sustainability, Diversification
Kenya	Tourism Research Institute – Climate Change & Tourism Sustainability Report	2024	Climate Policy/ Tourism	Tourism Research Institute	Link	Climate Change, Tourism Sustainability, Policy
Kenya	Kenya's Eco-Rating Certification Scheme	2002–Present	Tourism/ Sustainability	Ecotourism Kenya	Link	Sustainability Certification, Tourism Standards, Green Economy
Kenya	BIOPAMA Programme (Biodiversity and Protected Areas Management)	2020–2022	Conservation/ Community Development	European Union (funded)	Link	Community Conservation, Biodiversity, Marine Protected Areas
Kenya	Nairobi Convention – WIO Marine Protected Areas Dashboard	Undated	Regional Marine Governance	Nairobi Convention	Link	Regional Policy, Biodiversity, Ocean Governance
Kenya	Nairobi Convention – Ocean Economy Country Profile	2024	Blue Economy	UNEP/Nairobi Convention	Link	Blue Economy, Ocean Governance
Kenya	UNESCO World Heritage Convention – Lamu Old Town	1987	Heritage/Culture UNESCO	UNESCO	Link	Cultural Heritage, Tourism, Conservation
Kenya	Marine Conservation Institute – Blue Park Award (Kisite-Mpunguti)	2021	Marine Protected Areas/Global Recognition	Marine Conservation Institute	Link	Marine Protected Areas, International Award
Kenya	Pate Resources & Tourism Initiative (PRATI, Lamu)	2023–Present	Community-based Tourism	Wetlands International	Link	Mangrove Restoration, Community Tourism, Blue Economy
Kenya	Kuruwitu Conservation & Welfare Association (KCWA)	2010–Present	Community-based Conservation	IFAW	Link	Community Marine Protected Area, Fisheries Recovery, Blue Economy
Madagascar	Marine Spatial Planning (MSP) – Blue Economy Agenda	2021–Present	Blue Economy/ Marine Governance	WWF, Government of Madagascar	Link	Marine Spatial Planning, Blue Economy, Governance
Madagascar	Blue Economy Framework (Applying the Blue Economy in Madagascar)	Undated	Blue Economy/ Climate Policy	World Bank	Link	Blue Economy, Sustainable Development, Climate Policy
Madagascar	National Marine Protected Areas (22 MPAs including Nosy Ve–Androka, Ambodivahibe)	2011–Present	Marine Protected Areas	Nairobi Convention	Link	Marine Protected Areas, Biodiversity, Tourism
Madagascar	Madagascar Biodiversity Country Profile	2025	Marine Policy/ Conservation	Nairobi Convention	Link	Biodiversity, Marine Policy, Conservation
Madagascar	Economic Contribution of Protected Areas (Tourism Revenue & Fees)	2022	Protected Areas/ Finance	Cooke et al., 2022	Link	Protected Areas, Tourism Finance, Policy
Madagascar	Masoala National Park – COGES Revenue-Sharing Framework	1999–Present	Community-based Tourism/ Conservation	Ormsby & Mannle, 2006	Link	Community Ecotourism, Revenue Sharing, Marine & Terrestrial Integration
Madagascar	Locally Managed Marine Areas (LMMAs) & Dina Framework	2000s–Present	Community-based Marine Governance	Cripps & Gardner, 2016; Rakotoson & Tanner, 2006	Link	Community Marine Management, Customary Law, Conservation

Country	Policy/strategy name	Date	Sector	Source title (gov/academic preferred)	Source link	Keywords
Madagascar	Vezo Community Marine Stewardship Model	2016–Present	Community-based Marine Conservation	Cripps & Gardner, 2016	Link	Community Ecotourism, Fisheries, Customary Law
Madagascar	Festival des Baleines (Whale Festival, Sainte-Marie)	2015–Present	Marine Ecotourism/ Events	Cétamada, Local Authorities, NGOs	Link	Whale Tourism, Cultural Events, Community Participation
Madagascar	Whale Shark & Megafauna Tourism Valuation – Nosy Be	2019–2021	Marine Tourism/ Conservation	Ziegler et al., 2021	Link	Whale Sharks, Megafauna, Ecotourism
Madagascar	Climate Vulnerability Assessments for Coastal Communities	2021	Climate/Resilience Policy	Rakoto, 2021 (Nairobi Convention)	Link	Climate Change, Vulnerability, Coastal Policy
Madagascar	Coastal Livelihoods Policy Review	2011	Marine Policy/ Community	Nairobi Convention	Link	Coastal Livelihoods, Marine Governance
Madagascar	Cruise Tourism Development Strategy (Ehoala Port Expansion)	2024–2025	Marine Tourism/ Infrastructure	Carinah, 2025	Link	Cruise Tourism, Infrastructure, Blue Economy
Mauritius	Policy for the Blue Economy	2023	Blue Economy/ Ocean Economy	Policy for the Blue Economy in Mauritius (FAOLEX)	Link	Blue Economy Policy Framework, investment, sustainability, legal framework.
Mauritius	Ocean Economy Roadmap	2013	Ocean Economy Planning	The Ocean Economy in Mauritius: Vol 2	Link	Roadmap for developing ocean economy, marine spatial planning
Mauritius	Roadmap for an inclusive sustainable Ocean Economy Sector	2025-2029	Blue Economy/ Ocean Economy	Roadmap for an inclusive sustainable ocean economy sector	Link	SIDS to large ocean state transition, comprehensive ocean economy strategy
Mauritius	Strategic Plan 2021-2024 - Mauritius Oceanography Institute	2021-2024	Marine Research/ Ocean Science	Strategic Plan 2021-2024 - Mauritius Oceanography Institute	Link	Oceanographic research guidance, science-policy linkage.
Mauritius	Marine Spatial Plan for Republic of Mauritius	2021	Marine Spatial Planning	Marine Spatial Plan for the Republic of Mauritius	Link	MSP objectives, sustainable management, ecosystem approach
Mauritius	Fisheries Policy/ Regulations	Various	Fisheries/ Marine Resources	Fisheries - Policy Documents	Link	Fisheries management, aquaculture development, IUU fishing controls
Mauritius	Blue Bay Marine Park	2000	Marine Conservation	Blue Bay Marine Park: Management Plan	Link	Marine protected area, conservation, Ramsar site designation
Mauritius	Ocean Economy Priorities (Budget 2025-26)	2025	Ocean Economy/ Budget Strategy	Budget 2025-2026: Green Economy	Link	Ocean economy investment priorities, sustainable fisheries, marine transport, energy
Mauritius	Mauritius Blue Economy Vision	2020	Blue Economy	Mauritius Blue Economy - Ministry background	Link	Vision to double blue GDP, sector expansion (tourism, energy, biotech)
Mozambique	Blue Economy Development Strategy 2024–2033	2024–2033	Blue Economy	Republic of Mozambique, MIMAIP	Link	Blue Economy, Sustainable Development, Marine Resources
Mozambique	Mozambique: Blue Carbon Readiness Assessment	2024	Blue Economy/ Climate Policy	World Bank	Link	Blue Carbon, Climate Policy, Blue Economy
Mozambique	Mozambique Ocean Economy Country Profile	2022	Blue Economy/ Marine Policy	Nairobi Convention	Link	Blue Economy, Ocean Governance, Marine Policy
Mozambique	Ponta do Ouro Partial Marine Reserve Management Plan	2011	Marine Protected Areas	Ministry of Tourism, DNAC	Link	Marine Protected Areas, Fisheries, Conservation

Country	Policy/strategy name	Date	Sector	Source title (gov/academic preferred)	Source link	Keywords
Mozambique	Maputo National Park – Sport & Recreational Fishing Framework	2010–2019	Marine Recreation/ Fisheries	Viegas et al., 2022 (WIOMSA Symposium)	Link	Recreational Fisheries, Blue Economy, Marine Management
Mozambique	Manta Ray Protection & Tourism Policy	2016–Present	Conservation/ Ecotourism	Marine Megafauna Foundation	Link	Manta Rays, Ecotourism, Marine Conservation
Mozambique	Marine & Coastal Areas under Protection – MPA Outlook	2021	Marine Protected Areas	UNEP, WIOMSA, Nairobi Convention	Link	Marine Protected Areas, Biodiversity, Conservation
Mozambique	National Fisheries Management Plans (review)	2022	Fisheries/Marine Governance	ECOFISH	Link	Fisheries Management, Marine Policy
Mozambique	Nature-Based Tourism & PPPs in Conservation Areas	2018	Tourism/ Conservation	Republic of Mozambique	Link	Nature-based Tourism, PPPs, Conservation
Mozambique	Spatial Prioritization Analysis for MPA Expansion	2021	Marine Protected Areas	WCS Mozambique, National Institute for Fisheries Research	Link	Marine Protected Areas, Biodiversity, Fisheries Management
Mozambique	DolphinCare Code of Conduct (Marine Mammal Tourism)	1990s–Present	Marine Mammal Tourism/ Conservation	Dolphin Encountours Research Center (DERC)	Link	Marine Mammal Tourism, Ethical Guidelines, Conservation
Mozambique	International & Regional Conventions (CITES, IUCN Red List, UNEP Species+)	2019–Present	International Biodiversity Governance	UNEP, IUCN, CITES	Link	Biodiversity, Endangered Species, International Law
Réunion	UNESCO World Heritage Site – Pitons, Cirques, and Remparts	2010–Present	Conservation/ Heritage	UNESCO/UNEP-WCMC	Link	World Heritage, Biodiversity, Cultural Heritage
Réunion	Réunion National Park (including coastal integration)	2007–Present	Protected Areas/ Conservation	Réunion National Park	Link	Protected Areas, Biodiversity, Tourism
Réunion	Association Parc Marin (Marine Reserve Initiative)	Late 1990s–Present	Marine Protected Areas	Government of Réunion / Local Associations	Link	Marine Governance, Marine Protected Areas
Réunion	Marine Protected Area (MPA) Proposal & Social Acceptability Study	2006	Marine Protected Areas	Thomassin et al., 2010	Link	Marine Conservation, Community Perceptions, Policy Design
Réunion	Cultural Commodification & NBT Framework (Tourism–Culture Nexus)	2024	Tourism/Cultural Policy	Dunne, 2024	Link	Cultural Tourism, Identity, Policy
Réunion	Endogenous Causes of Tourism Stagnation Study (1981–2015)	2019	Tourism Policy/ Strategy	Charles et al., 2019	Link	Tourism Policy, Structural Weakness, Market Dependency
Réunion	Holiday Climate Index (HCI) Application for Tourism	1991–2020 (data applied, published 2024)	Climate/Tourism Policy	Prinsloo & Fitchett, 2024b	Link	Climate Policy, Tourism, Seasonality
Réunion	Coral Reef Health & Monitoring Framework	2000	Marine Conservation	Bigot et al., 2000	Link	Coral Reefs, Marine Monitoring, Biodiversity
Réunion	IFRECOR Award – Underwater Snorkelling Trail (L'Ermitage Lagoon)	2013	Sustainable Tourism/ Innovation	IFRECOR, La Réunion Tourism Board	Link	Ecotourism, Innovation, Sustainable Tourism
Réunion	World Cetacean Alliance “100 Measures” for Whale-Watching	2020	Marine Mammal Tourism/ Conservation	World Cetacean Alliance	Link	Whale Watching, Dolphin Tourism, Marine Policy
Réunion	Whale & Dolphin Watching Guidelines (Impact Study)	2017–2018	Marine Mammal Tourism/ Conservation	Hoarau et al., 2020	Link	Marine Mammals, Tourism Impacts, Policy Enforcement

Country	Policy/strategy name	Date	Sector	Source title (gov/academic preferred)	Source link	Keywords
Seychelles	Seychelles Marine Spatial Plan (SMSP)	2014–2023	Marine Spatial Planning/Blue Economy	Government of Seychelles, The Nature Conservancy, UNEP-WCMC	Link	Marine Spatial Planning, Blue Economy, Conservation, Tourism Regulation
Seychelles	Ste. Anne Marine National Park (oldest MPA, est. 1973)	1973–Present	Marine Protected Areas/Marine Tourism	SPGA, MCSS, SeyVillas	Link	Marine Protected Areas, Ecotourism, Coral Reefs, Community Engagement
Seychelles	2019 Coastal Management Plan	2019	Coastal Management/Climate Adaptation	Government of Seychelles, GFDRR	Link	Coastal Management, Risk-based Zoning, Tourism Planning
Seychelles	Blue Bond (sovereign bond for ocean conservation & sustainable fisheries)	2018–Present	Blue Economy/Finance	Government of Seychelles, World Bank	Link	Blue Economy, Sustainable Finance, Fisheries
Seychelles	Debt-for-Nature Swap (Marine Conservation Financing)	2016–Present	Blue Economy/Finance	Government of Seychelles, The Nature Conservancy	Link	Marine Conservation Finance, Blue Economy, Debt Swap
Seychelles	Blue Economy Development Priorities for Shared Prosperity	2017	Blue Economy/Development Strategy	International Monetary Fund (IMF)	Link	Blue Economy, Development, Shared Prosperity
Seychelles	IMF Climate Resilience Facility (funding coastal/marine adaptation)	2023	Climate Adaptation/Blue Economy	IMF	Link	Climate Resilience, Finance, Blue Economy
Seychelles	Locally Empowered Area Protection (LEAP) model	2021–Present	Community-based Conservation/Marine Governance	National NGOs, Communities (cited in Benoit, 2021)	Link	Community-based Conservation, Co-management, Marine Tourism
Seychelles	Community-Based Tourism (CBT) Policy Framework	2015–Present	Tourism/Community Livelihoods	Philpot, Gray & Stead, 2015	Link	Community-based Tourism, Livelihoods, Marine Tourism
Seychelles	Carrying Capacity Study (Tourism Policy Guidance)	2019	Tourism Management/Marine Conservation	Carlsen & Hissen-Lee, 2024	Link	Tourism Policy, Low-Impact Model, Marine Conservation
Seychelles	Carbon Neutral Destination Policies	2022	Tourism/Climate Policy	Gössling & Schweiggart, 2022	Link	Carbon Neutrality, Tourism, Climate Policy
Somalia	National Development Plan 9 (NDP-9)	2020–2024	National Development/Tourism & Blue Economy	Federal Republic of Somalia	Link	National Development, Tourism, Blue Economy
Somalia	National Transformation Plan (NTP)	2025–2029	National Development/Private Sector Growth	Federal Republic of Somalia	Link	Development Planning, Private Sector, Blue Economy
Somalia	National Blue Economy Strategy	2023–2027	Blue Economy/Marine Governance	National Economic Council (NEC Somalia)	Link	Blue Economy, Marine Governance, Coastal Development
Somalia	Proposed Marine Protected Areas (Saad ad-Dim Island, Maydh Island, others)	Planned 2025	Marine Protected Areas/Conservation	BIOPAMA, PERSGA, CBD	Link	Marine Protected Areas, Biodiversity, Conservation
Somalia	Sa'ad ad-Dim Island Marine Conservation & Ecotourism Initiative	2025 (planned)	Marine Conservation/Community Ecotourism	NEC Somalia, GEF, MARCOD	Link	Marine Conservation, Community, Ecotourism
Somalia	Badmaal Project – Somali Sustainable Fisheries & Blue Economy Development	2024–2025	Fisheries/Blue Economy	World Bank, Ministry of Fisheries	Link	Sustainable Fisheries, Blue Economy, Community Capacity
Somalia	CBD – Ecologically or Biologically Significant Marine Areas (EBSAs)	Undated	Marine Policy/Biodiversity	CBD	Link	Marine Biodiversity, Conservation, Policy
Somalia	CMS – Key Species & Migratory Routes	2023	Marine Biodiversity/Species Protection	CMS	Link	Migratory Species, Marine Mammals, Biodiversity

Country	Policy/strategy name	Date	Sector	Source title (gov/academic preferred)	Source link	Keywords
Somalia	PERSGA – Marine Protected Areas Programme	Undated	Regional Marine Governance	PERSGA	Link	Regional Policy, Marine Protected Areas, Governance
Somalia	UNEP Country Annual Results Report – Somalia	2023	Climate & Environmental Governance	UNEP	Link	Climate Adaptation, Marine Policy, Governance
Somalia	National Development Plan 9 (NDP-9)	2020–2024	National Development/ Tourism & Blue Economy	Federal Republic of Somalia	Link	National Development, Tourism, Blue Economy
Somalia	National Transformation Plan (NTP)	2025–2029	National Development/Private Sector Growth	Federal Republic of Somalia	Link	Development Planning, Private Sector, Blue Economy
Somalia	National Blue Economy Strategy	2023–2027	Blue Economy/ Marine Governance	National Economic Council (NEC Somalia)	Link	Blue Economy, Marine Governance, Coastal Development
Somalia	Proposed Marine Protected Areas (Saad ad-Dim Island, Maydh Island, others)	Planned 2025	Marine Protected Areas/Conservation	BIOPAMA, PERSGA, CBD	Link	Marine Protected Areas, Biodiversity, Conservation
Somalia	Sa’ad ad-Dim Island Marine Conservation & Ecotourism Initiative	2025 (planned)	Marine Conservation/ Community Ecotourism	NEC Somalia, GEF, MARCOD	Link	Marine Conservation, Community, Ecotourism
Somalia	Badmaal Project – Somali Sustainable Fisheries & Blue Economy Development	2024–2025	Fisheries/Blue Economy	World Bank, Ministry of Fisheries	Link	Sustainable Fisheries, Blue Economy, Community Capacity
Somalia	CBD – Ecologically or Biologically Significant Marine Areas (EBSAs)	Undated	Marine Policy/ Biodiversity	CBD	Link	Marine Biodiversity, Conservation, Policy
Somalia	CMS – Key Species & Migratory Routes	2023	Marine Biodiversity/ Species Protection	CMS	Link	Migratory Species, Marine Mammals, Biodiversity
Somalia	PERSGA – Marine Protected Areas Programme	Undated	Regional Marine Governance	PERSGA	Link	Regional Policy, Marine Protected Areas, Governance
Somalia	UNEP Country Annual Results Report – Somalia	2023	Climate & Environmental Governance	UNEP	Link	Climate Adaptation, Marine Policy, Governance
South Africa	Operation Phakisa – Oceans Economy	2014–Present	Blue Economy/ National Development	Department of Forestry, Fisheries & the Environment (DFFE)	Link	Blue Economy, Ocean Economy, Tourism, Fisheries, Aquaculture
South Africa	Marine Protected Areas (42 MPAs covering 15.43% of waters)	2014–2025	Marine Protected Areas/Conservation	UNEP-WCMC; DFFE; MPA Forum; Marine-protectedareas.org	Link	Marine Protected Areas, Biodiversity, Tourism, Fisheries
South Africa	Blue Flag Certification (Beaches & Marinas)	1990s–Present	Coastal Tourism/ Certification	Wildlife & Environment Society of South Africa (WESSA), FEE	Link	Eco-label, Sustainable Tourism, Beaches
South Africa	South Africa’s Coastal and marine Tourism Strategy	2016–Present	Tourism/Blue Economy	South African Maritime Safety Authority (SAMSA)	Link	Marine Tourism, Policy, Development Strategy
South Africa	Framework for Community Participation in Tourism (FCPT)	2023	Tourism/Community Development	Department of Tourism	Link	Community Tourism, Policy, Participation
South Africa	UNESCO World Heritage Sites linked to Marine Tourism (iSimangaliso Wetland Park, Robben Island, etc.)	1999–Present	Conservation/ Heritage	UNESCO, DFFE, iSimangaliso Authority	Link	World Heritage, Marine Conservation, Tourism

Country	Policy/strategy name	Date	Sector	Source title (gov/academic preferred)	Source link	Keywords
South Africa	Africa's Coastal Marine & Maritime Tourism Trade Market	2025	Regional/Blue Economy	Africa Coastal Marine & Maritime Tourism Alliance; Voyages Afriq	Link	Regional Tourism, Blue Economy, Trade, SMEs
South Africa	Recreational Fisheries & Spearfishing Management (National framework & permits)	2021–Present	Fisheries/Tourism	Department of Forestry, Fisheries & Environment; Potts et al. 2021	Link	Fisheries, Recreational Fishing, Tourism, Regulation
South Africa	Cruise Tourism Development Strategy (Durban & Cape Town ports)	2023–Present	Marine Tourism/Infrastructure	Tourism KwaZulu-Natal (TKZN)	Link	Cruise Tourism, Infrastructure, Blue Economy
South Africa	Whale Watching Regulations (Boat-based Wildlife Tourism Permits)	2020–Present	Marine Mammal Tourism/Regulation	International Whaling Commission; Judge et al. 2020	Link	Whale Watching, Marine Mammals, Regulation
Tanzania (Mafia Island)	Mafia Island Marine Park (MIMP) – General Management Plan	1995–Present	Marine Protected Areas/Conservation	FAO, URT, MPRU	Link	Marine Protected Areas, Conservation, Tourism
Tanzania (Mafia Island)	Rufiji-Mafia-Kilwa Marine Ramsar Site	2004–Present	International Wetlands/Conservation	URT, Ramsar Convention	Link	Ramsar Site, Wetlands, Conservation
Tanzania (Mafia Island)	Mafia Marine Reserves (Nyororo, Shungimbili, Mbarakuni)	2000s–Present	Marine Protected Areas	NEMC (2024)	Link	Marine Reserves, Biodiversity, Fisheries
Tanzania (Mafia Island)	Sea Sense Turtle Ecotourism & Conservation Programme	2012–Present	Community Conservation/Marine Ecotourism	Sea Sense	Link	Turtle Conservation, Ecotourism, Community Development
Tanzania (Mafia Island)	Whale Shark Tourism & Conservation Framework	2012–Present	Marine Ecotourism/Species Protection	WWF, Marine Megafauna Foundation	Link	Whale Sharks, Ecotourism, Conservation
Tanzania (Mafia Island)	Revenue-Sharing Model (MIMP: 30% to district & communities)	2010–Present	Finance/Community-Based Governance	FAO, WWF, URT	Link	Community Benefit Sharing, Finance, Conservation
Tanzania (Mafia Island)	Kua Ruins Cultural Heritage Conservation	2025	Heritage/Cultural Tourism	World Monuments Fund	Link	Cultural Heritage, Tourism Diversification
Tanzania (Mafia Island)	Green-Certified Infrastructure & Eco-Lodges Framework	2021–Present	Sustainable Tourism/Climate	UNWTO	Link	Eco-certification, Sustainable Tourism, Low-impact Lodges
Tanzania (Mafia Island)	Community-based Marine Conservation & Governance (Inclusive MIMP Governance)	2018–Present	Community Governance/Marine Policy	Panorama Solutions, URT	Link	Community Governance, Marine Policy, Tourism



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