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HIGH LEVEL PANEL *for*
**A SUSTAINABLE
OCEAN ECONOMY**

EXECUTIVE SUMMARY

OPPORTUNITIES FOR TRANSFORMING COASTAL AND MARINE TOURISM

Towards Sustainability, Regeneration
and Resilience

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Highlights

- Coastal and marine tourism constitutes approximately 50 percent of all global tourism, equal to US\$4.6 trillion or 5.2 percent of global gross domestic product (GDP). It is a vital component of the economy of small islands and coastal communities.
- The global pandemic highlighted the unique fragility of this sector, impacting the millions who depend on it for their livelihoods, underscoring the unsustainable pressure placed on coastal and marine ecosystems and calling into question the economic viability of the traditional model of mass tourism and unrestricted growth.
- Through a renewed focus on stimulating new high-quality economic opportunities for local communities, restoring the natural environment and revitalising cultural heritage and communities, tourism has the potential to be a key pillar in the transformation to a sustainable ocean economy—delivering on the vision for protection, production and prosperity.
- To deliver on this vision, destinations will need to overcome the sustainability challenges of the 20th century and adapt to the new challenges of climate change, biodiversity loss, evolving consumer preferences and global production and consumption systems. Transformation will require widespread
 - recognition of the underlying systemic causes of the current fragile, unsustainable state of coastal and marine ecosystems and the goods and services they provide;
 - recognition of the need to manage growing demand for tourism experiences as the global middle class continues to grow;
 - phasing out of practices and strategies that are no longer fit for the future;
 - implementation of new practices across the entire tourism value chain, including host and source tourism markets; and
 - proactive co-operation and collaboration across all tourism stakeholders to create business models to deliver sustainable tourism experiences.
- Numerous examples of innovation and leadership exist and provide evidence of success and proof-of-concept models that can be replicated. However, these examples are isolated and do not occur at the scale necessary for the systemic transformation that is needed to ensure the sector's sustainability.
- Changing patterns of behaviour and consumption suggest that tourists, as end users and drivers of demand, can serve as powerful agents of change. Exploring and capitalising on opportunities for tourists to support sustainable and regenerative forms of tourism through consumption, activities and funding will play an important role in transforming destinations and the industry at large towards a more sustainable model.
- Systemic change will not occur without significant long-term policy and regulatory commitments from governments to attract and support investments targeting sustainable and regenerative forms of tourism and provide the stability required by the private sector to confidently pursue new business models.
- This report provides a holistic assessment of the current state of coastal and marine tourism and draws on 32 case studies and examples from 23 countries to identify a set of priorities designed to help catalyse systemic change in destination-wide management through strategic investment and intervention by governments to support sustainable recovery from the global pandemic.
- It proposes a framework that encourages action simultaneously across three pillars:
 - Reducing the negative impacts of tourism on the local environment, economy and community
 - Regenerating ecosystems, local markets and communities
 - Building resilience to threats and future shocks and crises
- It provides a new comprehensive set of sustainability indicators incorporating the concepts of regeneration and resilience and tailored to the sustainability of coastal and marine tourism destinations to support governments to target appropriate investment for sustainability requirements and move beyond an over-reliance on GDP.
- Transformation will not be easy, but the long-term viability of the industry and the destinations and communities that rely on tourism will benefit greatly from the implementation of a reimagined model that is sustainable (considering economic, environmental and socio-cultural aspects of sustainability), regenerative (focus on rebuilding and restoring damaged or depleted ecosystems, communities and traditions) and capable of building resilience to future crises (such as climate change, disruptions to traditional travel patterns and potentially unsustainable levels of demand).
- The global pandemic has offered a circuit breaker to reflect on traditional forms of coastal and marine tourism that are no longer sustainable or viable and implement changes to reshape the sector. It has offered a unique and timely opportunity for bold action and political leadership.

Executive Summary

The natural resources that draw tourists to coastal and marine zones underpin the economies of most small island developing states and coastal destinations and provide myriad contributions to economic growth and human wellbeing. Yet, the health and beauty of these ecosystems - the very thing that draws people to coastal and marine destinations - continues to be threatened by tourism itself. While the inherent balancing act of nature-based tourism has always been apparent, the unprecedented pause in global tourism induced by the pandemic has provided a unique opportunity to reassess and reset.

Tourism constitutes the largest economic sector for most small island developing states (SIDS) and many coastal states. In a business-as-usual scenario, coastal and marine tourism was expected to represent the largest ocean economy sector by 2030 (measured by GDP) and employing approximately 8.5 million people, second only to small-scale fisheries in terms of employment (Tonazzini et al. 2019). It provides a vast array of important socio-economic opportunities for destinations, such as increased standards of living, employment and training opportunities, diversification for local communities and the socio-cultural benefits associated with interactions between people from differing cultural backgrounds. For the continued viability of tourism destinations and the livelihoods and wellbeing they support, coastal and marine tourism must continue to thrive.

Coastal and marine tourism is highly dependent on the quality of coastal and marine ecosystems to attract visitors, but the continued depletion and degradation of these natural assets is putting the sustainability and viability of the industry, along with the local communities that rely on it, at risk. One of the largest shares of the sector, coral reef tourism, attracts over 350 million people per year and has an estimated annual value of \$36 billion, with over 70 countries and territories having ‘million-dollar reefs’—reefs that generate over \$1 million per square kilometre per year in tourism spending.

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. Mass tourism in and around coastal cities leads to higher costs of living and relatively lower purchasing power for many locals. This situation is exacerbated by the seasonal nature of coastal and marine tourism, in particular in islands, contributing to job insecurity, low wages and high workload, affecting the wellbeing of locals and their access to resources. Additionally, the economic gains from tourism are not distributed equally, with large foreign companies and tour operators typically receiving disproportional benefits. When comparing the true socio-economic impacts, the costs of attracting and retaining mass tourism arrivals often outweigh the benefits.

Tourism is a highly emissions-intensive industry, contributing 8–11 percent of global greenhouse gas (GHG) emissions in 2013 (WTTC 2021b). Tourism has higher carbon intensity than major economic sectors such as manufacturing, construction and services (Lenzen et al. 2018). Globally, around 49 percent of tourism-related emissions are generated by transport and just over 6 percent by accommodation (WTTC 2021b). Tourism-related travel is a core contributor to this, particularly long-distance flights to reach remote coastal locations. The Intergovernmental Panel on Climate Change (2018, 2022) is increasingly emphasising the need for immediate actions to avoid future lock-in of high-carbon infrastructure as a necessary condition for achieving net-zero carbon dioxide (CO₂) emissions pledges. Systemic changes will be necessary to deliver successful climate mitigation, including net-zero pledges. Such systemic changes have the potential to disrupt existing arrangements in the tourism industry (Becken 2019).

The COVID-19 pandemic caused a major disruption in the tourism industry. The World Travel and Tourism Council has projected around 75 million job losses and a tourism-induced GDP reduction of more than \$2 trillion globally (WTTC n.d.), with the true economic and human cost today incalculable. Between 2019 and 2020, global GDP reportedly declined by 3.4 percent (World Bank n.d.b), most heavily affecting those economies dependent on tourism. SIDS in the Caribbean and the Pacific and Indian Oceans have experienced huge economic disruptions due to the loss of international tourism, with the full recovery of long-haul tourism in question as tourists become more risk averse in their behaviour.

Recovery from the pandemic and emerging future trends offer both opportunities and challenges for the future of coastal and marine tourism. This report identifies six key trends that serve to disrupt and reconfigure the future of coastal and marine tourism, with the global pandemic recognised as a singular catalyst for change. Table ES-1 outlines the major risks and opportunities of the six key future trends: shifting demand and preferences; labour; population growth and dispersion; climate change; loss of coastal ecosystems; and the changing impact of technology in tourism.

Table ES-1. Major Future Global Trends and Implications for Coastal and Marine Tourism

	RISKS	OPPORTUNITIES
Shifting demand and preferences	<ul style="list-style-type: none"> ▪ Travel systems will be restructured ▪ Diminished traveller confidence ▪ Increased cost of long-haul flights ▪ Travel ‘shaming’ and ‘eco-guilt’ ▪ Heightened complexity and localisation of entry requirements and transit hubs ▪ Virtual platforms replacing business travel ▪ Unprecedented numbers of tourists at domestic tourism sites ▪ Increased demand for tourism infrastructure in remote natural areas with low population density ▪ Increased pressure on natural resources in remote areas ▪ Increasing popularity of virtual reality tourism 	<ul style="list-style-type: none"> ▪ Greater domestic and regional travel ▪ Diversified domestic travel options ▪ Distribution of demand to reduce seasonality ▪ Increased tourism from proximate source markets as visitors travel closer to home ▪ Creation of hubs of ‘residential tourism’ ▪ Artificial reality and virtual tourism platforms ▪ People reconnecting to nature creates momentum for revival of ecosystems ▪ Increased demand for establishment of marine protected areas (MPAs) and for their effective management with stakeholder involvement ▪ Increased opportunities for ecotourism concessions in MPAs and in marine privately protected areas ▪ Emergence and growth of voluntourism and adventure tourism can be capitalised on through innovation ▪ Increased investment and livelihood opportunities for remote locations with low population density
Labour	<ul style="list-style-type: none"> ▪ Decreased post-pandemic labour supply in hospitality services ▪ Increased cost of labour and importance of job satisfaction to attract and retain staff ▪ Increased seasonality due to climate change ▪ Limited availability of skilled workers in new remote locations 	<ul style="list-style-type: none"> ▪ Upskilling and training local hires to enhance employment satisfaction and job security leading to greater staff retention ▪ Increased ability to keep tourist receipts in-country and in-community ▪ Increased employment options for remote locations with low population density ▪ Reduced inequalities between expatriate and local wages ▪ Equal access to gainful and rewarding employment for women, minorities and people with disabilities

Table ES-1. Major Future Global Trends and Implications for Coastal and Marine Tourism (Cont.)

	RISKS	OPPORTUNITIES
Population growth and dispersion	<ul style="list-style-type: none"> ▪ Growth of global middle class and acceleration of coastal tourism markets ▪ Continued growth and creation of coastal megacities increases pressure on human and ecosystem health ▪ Population displacement and migration threaten tourism in coastal and marine areas 	<ul style="list-style-type: none"> ▪ Population expansion creates opportunities for new tourism hubs and demand ▪ Younger generations with different value systems and preferences for travel, albeit with lower purchasing power
Climate change	<ul style="list-style-type: none"> ▪ Increasing extreme weather, climate extremes and sea level rise ▪ Unpredictable influxes of sargassum ▪ Increased pressure to reduce emissions limits travel (travel shaming and cost of offsets) ▪ Declining health of coral reefs and coastal and marine ecosystems limits tourism appeal ▪ Declining dune ecosystems which protect coastal tourism infrastructure ▪ Potential large-scale unemployment due to destruction of coastal resort systems ▪ Coastal infrastructure at risk ▪ Cost of adaptation ▪ Decreased efficiency and sustainability as countries revert to siloed national solutions 	<ul style="list-style-type: none"> ▪ Increased focus and incentives for net zero will make long-haul travel more expensive and decrease mass tourism, increasing opportunities for low-volume, high-quality and high-spending tourism ▪ Investment opportunities in renewable water and energy technologies and circular economy solutions provide cost savings ▪ New demand for low- or zero-emissions forms of transport provides opportunities for innovative finance, improved efficiency and economic growth ▪ Increased demand for nature-based solutions for coastal protection and resilience to reduce costs and increase benefit
Loss of coastal ecosystems	<ul style="list-style-type: none"> ▪ Accelerated decline in wildlife populations and species diversity ▪ Continued changes in behaviour of marine and coastal wildlife due to coastal development and increased marine activity ▪ Increased marine pollution (e.g. sewage, solid waste, single-use plastics) 	<ul style="list-style-type: none"> ▪ Payments for conservation management of marine and coastal natural resources ▪ Expanded MPAs with local participation ▪ Compatibility of nature-based marine tourism with other sustainable livelihoods based on marine resources (e.g. fishing and aquaculture) ▪ Improved research and awareness of impacts of tourism on marine and coastal biodiversity
Changing impact of technology	<ul style="list-style-type: none"> ▪ Connection issues in remote destinations contribute to equity issues ▪ Exclusion or disadvantaging of some countries, businesses or travellers ▪ High investment needs in digital infrastructure may overshadow other investment needs ▪ Increased energy demand adds to shortages and costs ▪ Modernisation and industrialisation contribute to loss of traditional low-tech crafts, skills and overharvesting of renewable materials 	<ul style="list-style-type: none"> ▪ User-generated content and big data as a major source of information for tourism ▪ Greater data collection can improve decision-making and product development ▪ Improved management of destinations which collects and deploys data for measurement of sustainability across all indicators ▪ Improved understanding of booking and travel patterns, including travel intensity and seasonality ▪ Technology improvements support better waste, water and energy efficiency ▪ Improved ability for tourists to assess sustainability of destinations and travel options ▪ Improved deployment of sustainable infrastructure using climate finance

Source: Authors.

In December 2020 the High Level Panel for a Sustainable Ocean Economy (Ocean Panel) established the goal that by 2030 ‘coastal and ocean-based tourism is sustainable, resilient, addresses climate change, reduces pollution, supports ecosystem regeneration and biodiversity conservation and invests in local jobs and communities’. Responding to the emerging opportunities and challenges for coastal and marine tourism and vision articulated by the Ocean Panel, this report presents a framework for sustainable coastal and marine tourism that emphasises the importance of regeneration and resilience and balances action across the traditional environmental, economic and socio-cultural pillars of sustainability. This framework is articulated in Figure ES-1, along with examples of key outcomes across each element of the framework needed to deliver on the 2030 Goal articulated by the Ocean Panel.

Coastal and marine tourism remains highly impactful on the local environment, economy and community and culture. Sustainability must start with reducing these negative impacts and minimising tourism’s footprint. Investments in sustainable infrastructure, such as recycling facilities, composting, sewerage and waste treatment facilities can dramatically reduce the impact of tourism activities as well as increase the value of a destination for tourists supported by climate and green financing mechanisms. Certifications have also proven highly effective in shifting behaviour and improving energy and water efficiency. At a destination-wide scale, utilising coastal zone management to site-intensive tourism activities and encouraging an ecosystem-centred approach to development has been effective.

The tourism industry, businesses, operators and tourists themselves need to take a far more active role in regeneration and restoration of the coastal and marine ecosystems on which the industry depends. Hotels and resorts can directly invest in marine privately protected areas (M-PPAs) and conservation efforts while enhancing the value of their own destination and providing value-added experiences for guests. Tourists themselves can be conscious and responsible travellers, selecting eco-friendly or nature-positive accommodations and tour operators, and they can participate in local restoration activities as part of their experience. At a destination-wide scale, pledges and user fees signed and paid upon arrival and digital technology are innovations being explored to shift tourist behaviour.

The concept of regeneration for coastal and marine tourism extends beyond ecosystems to encompass opportunities for economic regeneration, by investing in local education and training opportunities, and socio-cultural regeneration, by indigenous-led tourism and tourism that centers on local heritage and traditions. Coastal and marine tourism can rejuvenate local communities by providing high-quality jobs and long-term career paths, raising revenue for conservation and management of heritage sites and engaging with tradition, customs and local languages. Industry-led initiatives aimed at providing education for local communities (schooling as well as technical skills and training) and targeted employment opportunities for local communities have been effective. Tourism activities can also help maintain vital ecological knowledge, skills and information if authenticity is maintained. This ecological knowledge-based regenerative tourism plays a vital role for ocean ecology and the economic and social sustainability of coastal communities.

The long-term viability of coastal and marine destinations will require enhanced efforts now to improve resilience to events already well under way, such as climate change, and unexpected future shocks and crises. For many countries, this will mean marketing and developing products for domestic tourism to ensure product diversification, address issues of seasonality and appeal to a broader domestic audience. It also means that investments in tourism infrastructure, such as hotels and conference centers, should be designed to be multipurpose and adaptable to changing requirements. Insurance for investors against weather and other shocks and social safety nets will play an important role in de-risking some tourism destinations and activities. Destinations have an opportunity to improve resilience and foster regeneration using nature-based solutions for coastlines, such as restored and protected reef systems, mangroves and salt marshes. Tourism can provide a way forward for disaster-affected communities, supporting long-term resilience through connecting with tradition and culture. Sharing stories and culture is a form of resilience building and is regenerative in nature for the local community and cultural heritage while also providing an important source of income.

Figure ES-1. Outcomes for Sustainable, Regenerative and Resilient Coastal and Marine Tourism in 2030

SUSTAINABLE COASTAL AND MARINE TOURISM			
	ENVIRONMENTAL	ECONOMIC	SOCIO-CULTURAL
REDUCE IMPACTS	<ul style="list-style-type: none"> Carbon-neutral destinations Carbon-neutral travel Energy- and water-efficient infrastructure Minimal single-use plastics Treatment of solid waste and sewerage Integrated coastal zone management 	<ul style="list-style-type: none"> Locally owned business and tour operators Minimum wage, benefits and working conditions for all employees High rates of local employment 	<ul style="list-style-type: none"> Traditional culture and heritage showcased Behavioural guidelines for all tourist sites and operators Inclusive and participatory destination management plans and strategies Human rights protected Child and female exploitation prevented
REGENERATE	<ul style="list-style-type: none"> Renewable energy supports electrification for local community Rainwater and stormwater collection and treatment facilities provide water for local communities Composting facilities enrich local soil Tourists fund and engage restoration projects Marine protected areas (MPAs) and marine privately protected areas (M-PPAs) conserve biodiversity and marine life Coastal ecosystems improve local water quality and biodiversity Marine life repopulated where depleted 	<ul style="list-style-type: none"> User fees and visitor payments Long-term career paths enabled through apprenticeship, training and management programmes Microfinance funds small and medium enterprises, women and indigenous communities Majority of goods and services sourced locally 	<ul style="list-style-type: none"> Tourism revenue funds local education programmes Indigenous-owned and operated businesses flourish Guides and materials presented in local languages Cultural heritage sites restored Local knowledge systems and languages preserved
BUILD RESILIENCE	<ul style="list-style-type: none"> MPA and M-PPA networks allow for migration of marine life Living coastal infrastructure (mangroves, shellfish and coral reefs) protects coasts, reduces flooding and erosion 	<ul style="list-style-type: none"> Conservation Trust Funds provide secure funding streams for MPAs Diverse tourism sector Active domestic tourism Balance between local staff and foreign hires at all levels and job types Early warning systems manage climate risk 	<ul style="list-style-type: none"> Adaptation and management plans for local heritage sites MPAs and M-PPAs managed by local people

Source: Authors.

Examples of innovation and leadership exist in all regions and across the spectrum of stakeholders engaged in coastal and marine tourism. However, these examples are not happening at an industry-wide scale yet. Leadership remains isolated to individuals wishing to see changes in their business model or local environment. There remains a significant gap in achieving transformation across destinations. The lessons learned from these early initiatives need to be shared, replicated and, where possible, scaled to have a broader impact on the sustainability of the industry.

National governments have an opportunity to create an environment that recognises the true economic value of culture, heritage and natural systems; focuses on quality rather than quantity; and allows for genuine partnerships and collaboration with local communities. This report identifies five priority opportunities for action to help catalyse destination-wide systemic changes in coastal and marine tourism as part of recovery efforts:

- Focus tourism policies, plans, product development and marketing on attracting visitors who wish to engage genuinely with the communities and destinations they visit and support in the regeneration of the local environment, economy and community.
- Develop strategies to increase sustainable and resilient financing for conservation and restoration activities, including MPA management and enforcement, leveraging user fees and environmental taxes and also building long-term solvency through the establishment and endowment of conservation trust funds to ensure conservation funding is resilient to downturns in visitation.
- Collect, integrate and maintain data on sustainability indicators, including through national ocean and tourism accounts, to inform local authorities on how to manage operational externalities, target appropriate investment for sustainability requirements and move beyond an over-reliance on GDP.
- Undertake value chain analysis to align strategies and interventions to eliminate leakage and boost local economic prosperity.
- Utilise co-operation and collaborative management arrangements, such as destination management structures, to promote engagement of all stake-

holders in decision-making and implementation of tourism policies and plans, share expertise and resources and promote a common set of objectives.

A systemic transformation will also require tourists to be agents of change. Tourists themselves also have a vital role to play in demanding higher levels of social and environmental responsibility from the industry while at the same time exercising responsible consumption and favouring operators that meet sustainability standards. An emerging area for leadership by tourists is in avoiding air travel or at least choosing lower-emitting flights and accommodation options based on recent carbon calculators and carbon data transparency initiatives, such as Skyscanner and Google. The Palau Pledge and Ol'au Palau are examples of new and innovative ways to incentivise tourists to interact with the local community and culture and participate in local regeneration projects.

To finance a positive transformation of tourism, existing financial and incentive structures will need to be revised and many destinations will require new innovative financial mechanisms to ensure a just transition. Given the impact of the pandemic on the economies of many tourism-dependent islands and coastal destinations, new national funding packages, fiscal policies and non-traditional lending arrangements will be important. This paradigm shift will require investment and therefore monetary stimulus. Research has shown that tourists are willing to pay a lot more for access and improvements to high-quality coastal and marine resources. This underutilisation of tourist fees relative to their capacity suggests that a vast source of revenue for conservation initiatives and a potentially important tool for resource management is largely untapped. Levying bed taxes or entry fees to individual attractions can help raise revenues locally, and environmental taxes, climate finance and blue bonds for tourism investments provide growing opportunities at the national level.

Contribution to GDP alone is an insufficient metric for capturing something as multifaceted and complex as the long-term sustainability and viability of coastal and marine tourism. Establishing a baseline level of sustainability and measuring changes relative to that baseline are essential steps for destinations attempting to improve the sustainability of their coastal and marine tourism sector. This report outlines a comprehensive



set of indicators to help measure the environmental, economic and socio-cultural sustainability of coastal and marine tourism destinations. These indicators go beyond the initial set of indicators proposed in 2005 by the UN Environment Programme and UN World Tourism Organization, bringing in the concepts of regeneration and resilience and drawing on the more recent European Indicator Framework as well as other leading sources.

Transforming coastal and marine tourism to a more sustainable model will require unprecedented levels of co-operation and collaboration among all entities involved in and associated with tourism. Co-operation can enhance innovation, improve local capacity, protect shared natural resources and lower the costs of transitioning to sustainable practices. Risk-sharing mechanisms can encourage private investment in sustainable tourism projects. Destination stewardship councils and citizen science endeavours can be effective in fostering greater participation of local communities in decision-making, ownership of tourism operations and ultimately closing the equity gap. To incentivise and minimise risks for first movers, therefore avoiding a ‘race to the bottom’ for all destinations, regional co-operation and public-private partnerships offer a potential solution.

A number of key information gaps and challenges remain that should be prioritised for new research efforts. Further analysis and modelling are required to understand the benefits and costs of initiatives aimed at economic and socio-cultural sustainability and regeneration. There is an increasing body of evidence on the socio-economic benefits and costs of interventions

aimed at environmental sustainability and regeneration, but analyses of interventions aimed at improving work quality and economic prosperity and those designed to revitalise local culture and heritage remain under-served. Travel to and from destinations remains a driver of impacts and requires greater political attention, as does the sustainability of the cruise industry.

Despite the enormous potential that the global pandemic offers for a reset, little change is evident so far.

Where tourism is beginning to return, pent-up demand for ‘business as usual’ appears to be much higher than expected. Continued uncertainty surrounding recovery, coupled with complex regulatory requirements for travel, inconsistent and incomparable data and the highly localised nature of industry activity have hindered a unified response and systemic change in the long term.

The global pandemic has provided a timely period of reflection for the coastal and marine tourism sector regarding its real economic, social and environmental costs and the risks that a return to the pre-pandemic approach poses to the long-term viability of this sector.

Unless the full costs of tourism are considered, the future of the industry will remain inherently unsustainable and uncertain. The traditional model of tourism is, and always has been, beset with high levels of economic leakage at the destination level and varying levels of seasonality, with too many destinations over-reliant on tourism and therefore reinforcing models of mass tourism when alternative, more sustainable and regenerative forms of tourism make more economic, social and environmental sense.

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About the Ocean Panel

The High Level Panel for a Sustainable Ocean Economy (Ocean Panel) is a unique initiative by 16 world leaders who are building momentum for a sustainable ocean economy in which effective protection, sustainable production and equitable prosperity go hand in hand. By enhancing humanity's relationship with the ocean, bridging ocean health and wealth, working with diverse stakeholders and harnessing the latest knowledge, the Ocean Panel aims to facilitate a better, more resilient future for people and the planet.

Established in September 2018, the Ocean Panel has been working with government, business, financial institutions, the science community and civil society to catalyse and scale bold, pragmatic solutions across policy, governance, technology and finance to ultimately develop an action agenda for transitioning to a sustainable ocean economy. Co-chaired by Norway and Palau, the Ocean Panel is the only ocean policy body made up of serving world leaders with the authority needed to trigger, amplify and accelerate action worldwide for ocean priorities. The Ocean Panel comprises members from Australia, Canada, Chile, Fiji, France, Ghana, Indonesia, Jamaica, Japan, Kenya, Mexico, Namibia, Norway, Palau, Portugal and the United States and is supported by the UN Secretary-General's Special Envoy for the Ocean. The Secretariat, based at World Resources Institute, supports with analytical work, communications and stakeholder engagement.

This report has been commissioned by the Ocean Panel as a contribution to the *Transformations for a Sustainable Ocean Economy: A Vision for Protection, Production and Prosperity* and following the recommendation of the Tourism Action Coalition for a Sustainable Ocean. This report aims to support the goal that by 2030 'coastal and ocean-based tourism is sustainable, resilient, addresses climate change, reduces pollution, supports ecosystem regeneration and biodiversity conservation and invests in local jobs and communities' (Ocean Panel 2020).

The purpose of this report is to analyse and interpret the meaning and implications of this goal for 2030 and identify opportunities for action to achieve this goal.

This report is an independent input to the Ocean Panel process and does not necessarily represent the thoughts or opinions of the Ocean Panel.