Coastal & Marine Tourism

A Public-Private Sector Playbook to Deliver for Resilient Destinations

Aligning growth with net-zero and resilience



An initiative of the Ocean Catalyst Group | Coastal Tourism Breakthrough

IBEROSTAR
HOTELS & RESORTS

OCEAN & CLIMATE
PLATFORM

2026

About this Playbook

This Playbook is an initiative of the Ocean Catalyst Group, convened under the Coastal Tourism Breakthrough. It has been developed by Iberostar Hotels & Resorts and the Ocean & Climate Platform.



The Coastal Tourism Breakthrough

One of the Ocean Breakthroughs, it sets a shared ambition for the sector: US$30 billion a year in investment by 2030 to halve coastal tourism's emissions and build the resilience of coastal and island destinations.



The Ocean Catalyst Group

Brings travel and tourism businesses together to mobilise climate finance and infrastructure, and to safeguard high-risk assets and local livelihoods in the most climate-vulnerable coastal and island destinations.



How to use this Playbook

Sections 1 and 2 set out the case for action and the steps businesses can take in their own operations and value chains. Sections 3 and 4 show where transport, energy and supply-chain systems depend on public policy and investment, and what governments can do in partnership with industry.

Contents

Executive Summary 3

Summary: Priority Actions 4

1. Coastal & Marine Tourism at the Core of Climate and Economic Delivery 5

2. Business Action to Meet Climate Targets 8

3. Systemic Barriers: Why Business Action Alone Cannot Deliver Climate Targets 12

4. Government Collaboration: A Prerequisite for Climate-Aligned Coastal Tourism 15

5. A Low-Carbon and Climate-Resilient Tourism Future 19

Executive Summary

Coastal and marine tourism is a major pillar of the global economy. In 2023 it generated over US$3 trillion in total GDP contribution and supported around 100 million jobs, while accounting for roughly 3% of global greenhouse gas emissions. Coastal destinations are also highly exposed to climate risks, including sea-level rise, erosion, ecosystem degradation and extreme weather, which threaten the natural assets and infrastructure on which tourism and local livelihoods depend. As most of the sector's emissions stem from transport, energy systems and global value chains, meeting climate targets will require coordinated action between businesses and governments.

The health of the ocean is fundamental to climate stability. As the world's largest carbon sink, the ocean absorbs a significant share of human-induced CO_2 emissions and excess heat; its degradation weakens global mitigation capacity and increases risks for coastal destinations.

Coastal and marine tourism therefore sits at the intersection of economic growth, emissions reduction and resilience. By accelerating operational decarbonisation, restoring coastal ecosystems and supporting systemic transitions in transport, energy and supply chains, the sector can align growth with net-zero pathways and safeguard the long-term competitiveness of coastal destinations.

US$3.3 TN

Total GDP contribution, 2023

100 MN

Jobs supported

~3%

Share of global GHG emissions

Three levers for climate-aligned growth

Decarbonise operations

Renewable energy, efficiency, electrification and low-carbon procurement across properties and activities.

Restore coastal ecosystems

Protect reefs, mangroves, seagrasses and wetlands as natural carbon sinks and coastal defences.

Enable systemic transitions

Partner with governments on transport, energy and supply-chain systems beyond direct business control.

Source: WTTC and Iberostar 2025, "Coastal & Marine Tourism. Quantifying Its Footprint And Funding Requirements for Mitigation and Adaptation"

Summary: Priority Actions

The Playbook sets out complementary actions for businesses and governments. Progress on climate targets depends on both moving together.

For business

- **Integrate nature-based solutions** by protecting and restoring reefs, mangroves and seagrasses that act as carbon sinks and coastal defences.
- **Decarbonise operations** through renewable energy, energy efficiency, electrification of equipment and low-carbon procurement.
- **Reduce value-chain emissions** by prioritising local sourcing, circular resource use and collaboration with low-emission suppliers and excursion partners.
- **Align corporate climate strategies** with destination-wide transition plans covering energy, transport and land use.
- **Support low-carbon, climate-resilient infrastructure** through co-investment and advocacy.

For governments

- **Accelerate decarbonisation** of aviation, maritime and coastal mobility through supportive policy frameworks and infrastructure investment.
- **Expand renewable energy** generation, storage and grid modernisation in coastal and island destinations.
- **Strengthen local supply chains** by supporting low-carbon logistics, circular economy models and domestic production.
- **Mobilise blended finance** and build investable pipelines for coastal ecosystem restoration and climate-resilient infrastructure.
- **Provide stable, long-term policy signals** that align tourism growth with national climate and biodiversity strategies.

1

Coastal & Marine Tourism at the Core of Resilient Coastal Economies

Key messages

- Coastal and marine tourism is a major economic driver, generating US$3 trillion in total GDP contribution and supporting around 100 million jobs worldwide.
- The sector is highly exposed to climate impacts such as sea-level rise, erosion, coral bleaching and extreme weather, which threaten infrastructure and competitiveness.
- The ocean is a critical carbon sink, and its decline amplifies risks to tourism and to global climate stability.



1.1 A Cornerstone of Coastal Economies

Coastal and marine tourism is a major economic engine globally and a critical pillar of many coastal and island economies. In 2023 the segment generated around US$1.5 trillion in direct GDP, rising to US$3.3 trillion including supply-chain impacts, while supporting approximately 52 million direct jobs and up to 100 million jobs overall.

US$1.5 TN

Direct GDP, 2023

US$3.3 TN

GDP including supply chain

~52 MN

Direct jobs

100 MN

Total jobs, including supply chain

Why it matters

These figures underline the sector's central role in driving economic growth, employment, tax revenues and community livelihoods in coastal regions.

For many destinations, tourism underpins foreign exchange earnings, supports SMEs and local suppliers, and sustains public revenues that fund infrastructure and social services. Protecting the long-term viability of coastal tourism is therefore directly linked to safeguarding national economic stability and inclusive growth.

Source: WTTC and Iberostar (2025), Coastal & Marine Tourism. Quantifying Its Footprint And Funding Requirements for Mitigation and Adaptation

1.2 High Value, High Climate Exposure

The same coastal concentration that drives economic value also creates heightened vulnerability to climate impacts. Sea-level rise, coastal erosion, coral bleaching and more frequent extreme weather are already affecting infrastructure, natural attractions and operational continuity.

Rising climate risks

- **Sea-level rise and coastal erosion**
- **Coral bleaching and ecosystem degradation**
- **More frequent extreme weather events**

What's at risk

- **Physical tourism assets and infrastructure**
- **Local employment and supply chains**
- **Long-term destination competitiveness and investor confidence**

These risks are compounded by the declining health of marine ecosystems that play a critical role in regulating the global climate. The ocean functions as the world's largest carbon sink, absorbing a substantial share of human-induced CO_2 and excess heat.

~30%

Ocean as a critical climate regulator

The ocean has absorbed almost 30% of human-induced CO_2 emissions since 1750.

Protecting ocean health is essential for tourism resilience and for the natural climate regulation on which all coastal economies depend.

Source: IPCC (2013), Climate Change 2013: The Physical Science Basis, Summary for Policymakers. [Consider updating to IPCC AR6]

2

Business Action to Meet Climate Targets

Key messages

- Protect and restore coastal ecosystems (reefs, mangroves, seagrasses) as critical climate infrastructure that supports resilience and carbon sequestration.
- Decarbonise operations and value chains through renewable energy, electrification, circular practices and low-carbon sourcing.
- Align business action with destination-wide climate plans for coordinated, system-level impact.
- Invest in low-carbon, climate-resilient infrastructure to support long-term sustainability and competitiveness.



2.1 Coastal Ecosystems as Climate Infrastructure

Why it matters

Businesses should prioritise investment in protecting and restoring reefs, mangroves, seagrasses and coastal wetlands as essential climate infrastructure. Beyond protecting shorelines and supporting biodiversity, these ecosystems are part of the wider ocean system that acts as the world's largest carbon sink. Their degradation weakens both local resilience and global mitigation capacity; their protection and restoration strengthens destination resilience and contributes directly to global climate goals.



Coral reefs



Mangroves



Seagrasses



Coastal wetlands

Priority actions for ecosystem restoration



Integrate nature-based solutions into property development, shoreline management and destination resilience strategies.



Partner with conservation organisations and local communities so that restoration projects deliver both ecological and socio-economic benefits.



Invest in or co-finance large-scale ecosystem restoration initiatives aligned with national climate and biodiversity priorities.

2.2 Decarbonise Operations and Value Chains

Why it matters

Businesses should prioritise rapid emissions reductions within their own operations and value chains, focusing on the levers they control directly. In coastal and marine tourism, a large share of emissions arises from energy use in accommodation, on-site fuel consumption, guest activities, food and beverage services, and the sourcing and transport of goods. Addressing these sources delivers immediate progress towards climate targets, reduces exposure to energy price volatility and strengthens operational resilience. Practical changes also send strong market signals to suppliers and partners, helping to accelerate decarbonisation across the tourism ecosystem.

Priority actions



Switch to renewable electricity and improve energy efficiency across coastal properties, buildings and operations.



Electrify on-site vehicles, vessels and equipment where feasible, and phase out fossil-fuel-based systems.



Reduce value-chain emissions by prioritising local, low-carbon and sustainably produced goods and services.



Embed circular practices, including reducing food waste, eliminating single-use materials and improving resource efficiency.



Work with excursion, transport and logistics partners to lower emissions from guest mobility and supply deliveries.

2.3–2.4 Destination Plans and Resilient Infrastructure

Align with destination transition plans

Businesses should align their climate and nature strategies with destination-level transition pathways covering energy systems, mobility networks and land-use planning. This alignment helps individual company actions add up to system-wide emissions reductions and resilience outcomes.

- **Engage with destination authorities** to integrate corporate decarbonisation targets into regional climate strategies.
- **Coordinate renewable energy adoption** and efficiency measures with national grid transition plans.
- **Support destination-wide initiatives** on low-carbon mobility, waste reduction and circular resource use.

Enable low-carbon, resilient infrastructure

Future coastal tourism growth must be supported by infrastructure that is both low-carbon and resilient to climate impacts. Electrified transport, renewable-powered resorts, resilient coastal defences and climate-proofed ports and airports will be essential to sustain competitiveness and operational continuity.

- **Advocate for and co-invest in** renewable-powered infrastructure, electrified mobility and resilient coastal protection.
- **Ensure new developments and retrofits** meet low-carbon and climate-resilient design standards.
- **Collaborate with governments and financial institutions** to scale investment in climate-resilient tourism infrastructure.

3

Systemic Barriers: Why Business Action Alone Cannot Deliver Climate Targets

Key messages

- Coastal and marine tourism accounted for roughly 3% of global greenhouse gas emissions in 2023, most of them tied to systems outside direct business control.
- Supply chains, transport and utilities account for the large majority of the sector's footprint.
- Structural decarbonisation of transport, energy and supply chains depends on government leadership, supportive policy and targeted infrastructure investment.

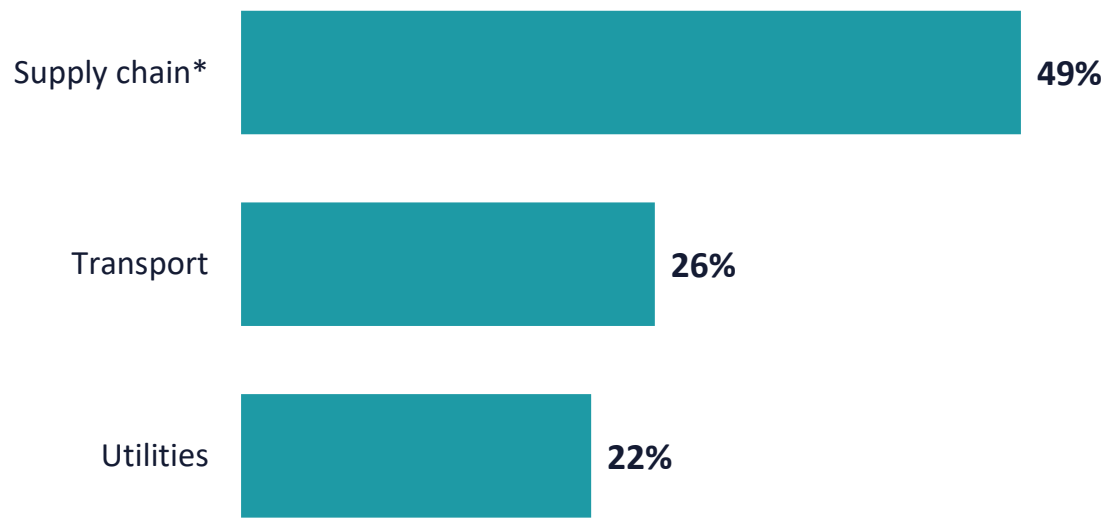


3. Where the Sector's Emissions Come From

~3%

Sector footprint: coastal and marine tourism accounted for roughly 3% of global greenhouse gas emissions in 2023. The majority are tied to systems outside direct business control.

Emissions by source (scopes 1–3 and international transport)



** Supply chain figure covers scopes 2 and 3 only, as presented in the source analysis.*

The need for structural change

These major emissions sources sit largely outside direct business control, creating structural barriers to rapid decarbonisation. Structural decarbonisation of transport, energy and supply chains is required to meet climate targets.

Source: WTTC and Iberostar (2025), Coastal & Marine Tourism. Quantifying Its Footprint And Funding Requirements for Mitigation and Adaptation

3.1–3.3 Transport, Energy and Supply Chains

To align with net-zero pathways, the tourism sector relies on systemic transformations in key infrastructure networks.



Transport systems

Access to coastal destinations depends heavily on aviation, cruise shipping and ground mobility. Transitioning these systems to low-carbon fuels, electrified fleets and efficient multimodal networks requires government-led infrastructure investment, regulatory frameworks and international coordination. Without these shifts, emissions linked to destination access will remain a major constraint on meeting climate targets.



Energy systems

Many coastal and island destinations rely on fossil-fuel-based energy grids. This limits the ability of hotels, resorts and marine tourism facilities to reduce operational emissions even when businesses are willing to invest. Expanding renewable capacity, upgrading grids and ensuring reliable clean power supply are therefore essential enablers of tourism decarbonisation.



Supply chains

Tourism supply chains in coastal destinations are often long, import-dependent and carbon-intensive. Food, construction materials and consumer goods transported over long distances increase emissions and reduce resilience to climate disruption. Aligning supply chains with low-carbon logistics, local sourcing and circular economy models requires supportive public policy and investment.

Overcoming these barriers depends largely on action beyond direct business control. **Government leadership, supportive policy frameworks and targeted infrastructure investment** are essential to unlock tourism decarbonisation.

4

Government Collaboration: A Prerequisite for Climate-Aligned Coastal Tourism

Key messages

- Delivering climate-aligned coastal tourism requires coordinated public–private action across transport, energy, supply chains and finance.
- Governments have a central role in decarbonising transport, expanding renewable energy and building resilient, low-carbon supply chains.
- The transition is estimated to need US$120–259 billion a year, supported by blended finance, stable policy and clear monitoring.



4.1 Decarbonise Transport and Mobility Systems

The context

Access to coastal destinations depends on aviation, maritime transport and local mobility networks, which together account for a large share of tourism-related emissions. Accelerating the deployment of sustainable aviation fuels, low-emission maritime fuels, electrified port infrastructure and integrated low-carbon mobility networks is central to meeting climate targets and sustaining destination competitiveness.

Required actions



Policy frameworks and incentives

Develop policy frameworks and incentives to scale sustainable aviation fuels and low-emission maritime fuels.



Electrified infrastructure

Invest in electrified port, airport and coastal mobility infrastructure serving tourism destinations.



Integrated multimodal networks

Support integrated, low-carbon multimodal transport networks connecting coastal regions.

Delivering climate-aligned coastal tourism requires coordinated public–private action. **Strong government leadership** is essential to unlock systemic change at the scale required.

4.2–4.3 Renewable Energy and Sustainable Supply Chains

Expand renewable energy systems

Reliable and affordable access to renewable energy is a prerequisite for decarbonising tourism operations. Many coastal and island destinations remain dependent on fossil-fuel-based grids. Public investment, grid modernisation and regulatory stability are needed to enable large-scale clean energy adoption.

- **Accelerate deployment** of renewable generation and storage in coastal and island destinations.
- **Modernise grids** to support electrification of tourism facilities and transport.
- **Provide stable regulatory frameworks** that encourage private investment in clean energy.

Build sustainable supply chains

Governments play a decisive role in shaping sustainable production systems, logistics infrastructure and local sourcing ecosystems. Policies that support low-carbon freight, sustainable agriculture and circular resource use can significantly reduce emissions and strengthen economic resilience in coastal communities.

- **Support local and regional sourcing** to reduce reliance on carbon-intensive imports.
- **Invest in low-carbon logistics** and freight infrastructure serving coastal destinations.
- **Promote circular economy policies** that reduce waste and improve resource efficiency.

Strong government leadership, supported by blended finance and investable project pipelines, is essential to unlock systemic change at the scale required.

4.4 Mobilise Finance for Coastal Resilience

Meeting climate targets while restoring coastal ecosystems will require significant investment in mitigation, adaptation and nature-based solutions. Estimates suggest that between US$120 billion and US$259 billion a year may be needed globally to align coastal and marine tourism with climate and resilience pathways.

Required investment

US$120–259 BN a year

This investment protects a multi-trillion-dollar sector that sustains millions of jobs and underpins the prosperity of coastal economies worldwide. Closing the gap will require public and private capital working together.

Blended finance mechanisms

Combine public funds, international climate finance and private capital to scale investment in coastal restoration and resilience.

Investable project pipelines

Develop project pipelines aligned with national climate and biodiversity strategies.

Long-term policy certainty

Provide long-term policy certainty to attract private capital into climate-resilient tourism infrastructure.

Transparent MRV systems

Create transparent monitoring, reporting and verification systems to ensure measurable outcomes and investor confidence.

Clear government policy frameworks, blended finance mechanisms and credible pipelines of restoration and climate-resilient infrastructure projects are **essential to mobilise investment at the scale required.**

Source: WTTC and Iberostar (2025), Coastal & Marine Tourism. Quantifying Its Footprint And Funding Requirements for Mitigation and Adaptation

5. A Low-Carbon and Climate-Resilient Tourism Future

The climate and ocean imperative

Coastal and marine tourism sits at the intersection of high economic value, high emissions exposure and high physical climate risk. As the world's largest carbon sink and a key regulator of global climate systems, a resilient and thriving ocean underpins both the long-term sustainability of coastal tourism and the achievement of global net-zero ambitions. It is therefore critical to reduce emissions, strengthen resilience and restore the ecosystems that underpin destination competitiveness.

Systemic transformation

The scale of transformation required calls for strong collaboration between business and government on transport, energy and supply chains, so that tourism growth aligns with global climate targets and sustains the economic vitality of coastal destinations and communities.

Join the Ocean Catalyst Group

The Ocean Catalyst Group welcomes businesses, destinations and finance partners ready to turn the actions in this Playbook into investable projects across coastal and island destinations.

To join or learn more, reach out to sustainability@wttc.org.



An initiative of the Ocean Catalyst Group | Coastal Tourism Breakthrough

IBEROSTAR
HOTELS & RESORTS

OCEAN & CLIMATE
PLATFORM