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FII INSTITUTE Future Investment Initiative Institute | Impact on Humanity

UNLOCKING INNOVATION FOR REGENERATIVE TOURISM

2025

CONTRIBUTORS

As an outcome of the FII8 conclave on oceans, Red Sea Global, FII Institute, Wave and The Prince Albert II of Monaco Foundation formed the Blue Economy Working Group with the aim of producing three reports and holding discussions through the year on key topics.

FII Institute

The Future Investment Initiative (FII) Institute is a global non-profit foundation with an investment arm and a single agenda: Impact on Humanity. Global, inclusive, and data-driven, the Institute brings together the world's brightest minds to transform ideas into real-world solutions across four critical pillars: Artificial Intelligence & Robotics, Education, Healthcare, and Sustainability.

WAVE

Founded by Her Royal Highness Princess Reema Bandar Al-Saud, Wave is Catmosphere Foundation's Collective Action Platform dedicated to restoring a thriving ocean by 2050. Powered by the Future Investment Initiative (FII) Institute, and in partnership with the Ministry of Energy of the Kingdom of Saudi Arabia, Wave strives towards the ambitious yet attainable goal of ocean regeneration within a human generation.

The Prince Albert II of Monaco Foundation

The Prince Albert II of Monaco Foundation is a global non-profit organisation committed to progressing Planetary Health for present and future generations. Founded by HSH Prince Albert II of Monaco in 2006, the Foundation exists to promote a new relationship with nature and the innovations that can impact this change. The Foundation aims to bring humanity together to empower impactful solutions for our planet's biodiversity, climate, ocean and water resources. It works in three main geographical areas: the Mediterranean Basin, the Polar Regions and the Least developed countries.

Red Sea Global

Red Sea Global (RSG) is a vertically integrated real estate developer with a diverse portfolio across tourism, residential, experiences, infrastructure, transport, healthcare, and services. This includes the luxury regenerative tourism destinations The Red Sea, which began welcoming guests in 2023, and AMAALA, which remains on track to welcome first guests in 2025. A third destination, Thuwal Private Retreat, opened in 2024.

RSG is a cornerstone of Saudi Arabia's ambition to diversify its economy. Across its growing portfolio of destinations, subsidiaries, and businesses, RSG seeks to lead the world towards a more sustainable future, showing how responsible development can uplift communities, drive economies, and enhance the environment.

PREFACE

The blue economy is emerging as a major frontier for sustainable growth. Valued today at $2.5 trillion annually, it is projected to double by 2030 compared to 2010 levels. But unlocking this potential requires more than optimism—it demands over $3 trillion in investment in the coming decades to combat climate change, restore biodiversity, and drive inclusive, ocean-based economic development. Currently, ocean investments represent only a small fraction of the estimated $2.5 trillion needed by 2030 from both sovereign and private sources.

In October 2024, during the 8th edition of the Future Investment Initiative (FII8), a high-level conclave—**chaired by Red Sea Global, The Prince Albert II of Monaco Foundation, and WAVE**—brought together 20 leading investors, policymakers, and innovators to tackle the question: How can we mobilize capital for blue tech innovation and ocean regeneration? Three challenges stood out:

1. The urgent need to scale up private sector investment;
2. A fragmented landscape of frameworks, standards, and incentives;
3. The underdevelopment of a robust blue tech innovation ecosystem.

The initial dialogue was guided by a first report mapping the overall market opportunity of the blue economy: OCEAN REGENERATION FOR FUTURE PROSPERITY Priority Champions. To take this dialogue forward, a **working group was formed by the conclave chairs**. Our aim: to explore sector-specific opportunities that meet the criteria of being economically viable, environmentally regenerative, and socially inclusive.

This first deep dive focuses on Regenerative Tourism—a sector at the intersection of economic growth, nature conservation, and community resilience, noting that 50% of global tourism is coastal. To shape this study, we conducted a series of surveys targeting three stakeholder groups: **hospitality sector leaders, investors, and innovators.**

The insights they shared reveal both momentum and barriers:

- **Hospitality leaders** are split in their approach. They view the market as one with potential but still under development. While 50% feel relatively familiar with regenerative tourism concepts, and the same proportion are engaged with implementing interventions, only 20% have actually adopted significant measures. Challenges to adoption include cost, which 57% of respondents listed as a concern, and market readiness (43%). Another 28% perceive the startup pipeline as underdeveloped, with limited disruptive and scalable solutions. Amongst ideas to accelerate the sector, access to a promising pipeline of innovations stood out with 56% of respondents. Market demand also remains a concern, with 40% believing consumers are not yet willing to pay a premium for regenerative experiences.

- **Investors**—including VCs, private equity firms, corporate investors, and impact funds—express growing curiosity but caution. 58% say they need more data and clarity on regenerative tourism to make confident decisions. Just over 30% already see the sector as a promising investment opportunity with strong potential returns, while 16% still view it through a conservation lens and await proof of profitability. Encouragingly, over 60% are actively exploring or sourcing opportunities in the space.

- **Innovators** in regenerative tourism—offering solutions in biodiversity restoration, data monitoring, community engagement, and waste management—share a mixed reality. While over 80% are already generating revenue and expanding to new markets, 42.9% identify limited awareness of economic potential as a barrier to fundraising. Another 32% point to the lack of specialized investors, while others cite slow adoption by industry players and insufficient regulatory support. Still, the pipeline is growing: 35% of surveyed startups have secured early-stage capital, and 21% have raised multiple rounds.

These insights fed into the composition of this report. While not intended as a comprehensive industry study, it offers a valuable snapshot of current dynamics, gaps, and expectations which responds to the key insights identified by stakeholders:

- Market size and growth potential;
- A map of the regenerative tourism innovation ecosystem;
- Emerging trends and technologies; and
- Real-world case studies and corporate use cases.

Our aim is to provide a practical and inspirational resource—grounded in real data and voices from the field—to support collaboration, investment, and innovation in regenerative tourism. We hope this report contributes to the broader movement to build a regenerative, inclusive, and resilient blue economy. These insights fed into the composition of this report developed by FII Institute, Red Sea Global, Wave and Prince Albert Foundation II.

This report was presented to a group of industry stakeholders prior to its publication in June 2025, at the Blue Economy & Finance Forum in Monaco, and subsequently at the United Nations Ocean Conference in Nice. Feedback from participants was sought in the various recommendation focus areas. The insights and stakeholder input received from these interactive sessions will feed into the future work of this working group and help us to turn the initial recommendations of this report into concrete action.

CONTENTS

I. INTRODUCTION

Tourism stands as a cornerstone of the global economy, contributing significantly to employment, economic growth, and cultural exchange. In 2023, the travel and tourism sector's direct contribution to the global Gross Domestic Product (GDP) was approximately $9.9 trillion, accounting for 9.1% of the total global GDP. This sector also plays a pivotal role in job creation, supporting millions of livelihoods worldwide.

Coastal and marine tourism, in particular, represents at least 50% of total global tourism. This underscores the sector's substantial influence on both local and global economies, especially for small island developing states and coastal communities where tourism often constitutes the largest economic sector.

However, the rapid expansion of tourism has precipitated significant environmental challenges. The United Nations Environment Programme (UNEP) projects that, under a 'business-as-usual' scenario, tourism could lead to a 154% increase in energy consumption, a 131% rise in greenhouse gas emissions, a 152% surge in water consumption, and a 251% escalation in solid waste disposal by 2050. These environmental impacts not only degrade natural ecosystems but also threaten the very resources that tourism depends upon, thereby jeopardizing the sector's long-term economic performance.

The degradation of coastal and marine environments can lead to a decline in tourist arrivals, reduced visitor spending, and loss of employment in tourism-dependent communities. For instance, studies have shown that doubling the amount of marine debris on beaches can result in a significant decrease in the number of days visitors spend on those beaches, leading to substantial economic losses for local communities. Conversely, destinations that prioritize genuine regenerative ambitions and sustainable practices can achieve higher levels of resilience in the face of environmental and economic challenges.

In light of these challenges, there is an imperative need to transition towards a regenerative blue economy. This approach seeks not only to minimize the environmental footprint of tourism but also to actively restore and enhance marine and coastal ecosystems. By adopting sustainable practices, investing in conservation efforts, and engaging local communities in decision-making processes, the tourism sector can ensure its resilience and continued contribution to global prosperity.

II. ENVIRONMENTAL AND SOCIOECONOMIC RISKS IN COASTAL DESTINATIONS

As the industry continues to expand, it faces growing challenges that threaten both its long-term sustainability and the health of marine and coastal ecosystems. The pressure from increased tourism activity is placing an unsustainable burden on natural resources, local communities, and infrastructure, necessitating urgent action to mitigate its negative impacts.

ENVIRONMENTAL DEGRADATION AND ECOSYSTEM LOSS

Tourism depends heavily on the appeal of pristine natural environments, yet its expansion often leads to their degradation. Unregulated coastal urban development has resulted in the destruction of vital ecosystems such as coral reefs, mangroves, and seagrass meadows. These ecosystems provide essential services, including shoreline protection, carbon sequestration, and biodiversity conservation. According to the IUCN, 50% of mangrove forests are at risk of collapse by 2050 due to coastal development, increasing vulnerability to extreme weather events and reducing fishery productivity. Similarly, nearly 75% coral reefs are under threat from global warming and from human activities, with tourism playing a significant role in their decline through direct damage from diving, anchoring, and pollution.

Plastic and marine pollution further exacerbate environmental degradation. The tourism sector is responsible for millions of tonnes of plastic waste annually, much of which ends up in the ocean. In popular tourist destinations, inadequate waste management infrastructure often results in littered beaches and marine pollution that harm both wildlife and visitor experiences.

POLLUTION AND UNSUSTAINABLE RESOURCE USE

The tourism industry is resource-intensive, requiring large amounts of water, energy, and materials. Many coastal destinations already face water scarcity, and excessive tourism demand exacerbates the issue.

Chemical pollution also poses a significant challenge. Wastewater discharge from hotels and resorts, combined with chemical runoff from agriculture and golf courses, contributes to marine contamination. A large portion of wastewater in major tourist areas is released untreated, leading to algal blooms, coral degradation, and declines in marine biodiversity. It is estimated that around 14,000 tons of sunscreen chemicals are released into the waterways annually. They are suspected to contribute to coral bleaching, particularly oxybenzone and octinoxate, leading some destinations to ban these harmful substances.

Underwater noise pollution is another pressing issue. Increased boat traffic, jet skis, and large cruise ships create excessive noise levels that disrupt marine species, particularly whales and dolphins that rely on echolocation for navigation and communication.

CLIMATE CHANGE AND NATURAL DISASTERS

Climate change presents an existential threat to coastal tourism. Rising sea levels, more frequent extreme weather events, and ocean warming are already affecting many destinations. Global sea levels have risen by 8–9 inches since 1880, and projections suggest a rise of up to 1 metre by 2100. For low-lying island nations such as the Maldives, where 80% of land sits less than 1 metre above sea level, rising seas pose a direct threat to tourism infrastructure and livelihoods.

Extreme weather events, including hurricanes, typhoons, and cyclones, are becoming more intense and frequent due to climate change. In 2017, Hurricane Irma caused several billions dollars in damages, devastating tourism infrastructure in the Caribbean, and leading to prolonged economic losses. These climate-related disasters disrupt travel patterns, damage natural attractions, and create instability in tourism-dependent economies.

Additionally, ocean warming has caused mass coral bleaching events, significantly reducing the appeal of snorkeling and diving tourism. The Great Barrier Reef, a key tourist attraction in Australia, has lost 50% of its coral cover since 1995 due to bleaching. Without

urgent action to address greenhouse gas emissions, the continued degradation of marine ecosystems will erode the foundations of coastal tourism.

The challenges facing coastal and marine tourism are diverse and complex, spanning environmental, economic, and social dimensions. While the sector remains a key driver of global economic activity, its long-term sustainability is increasingly under threat. Addressing these challenges requires urgent action, including better governance, improved waste management, sustainable resource use, and climate adaptation measures. If left unchecked, the impacts of tourism on marine and coastal ecosystems could become irreversible, diminishing the industry's economic potential and threatening the livelihoods of millions of people worldwide. Ensuring a transition towards sustainable and regenerative tourism models will be essential for securing the future of this vital industry.

NUMBERS

50% OF MANGROVE FORESTS
AT RISK BY 2050

75% OF CORAL REEFS
UNDER THREAT

MILLIONS OF TONS
OF PLASTIC WASTE
FROM TOURISM ANNUALLY

14,000 TONS OF SUNSCREEN
CHEMICALS ENTERING
WATER EACH YEAR

20 – 23 CM SEA LEVEL RISE
SINCE 1880; UP TO 1 METRE BY 2100

80% OF MALDIVES' LAND SITS
LESS THAN 1 METRE ABOVE SEA LEVEL

2017: HURRICANE IRMA
CAUSED **BILLIONS** IN DAMAGES

50% CORAL LOSS
IN THE GREAT BARRIER REEF
SINCE 1995

III. REGENERATIVE TOURISM: A NEW PARADIGM

Regenerative tourism and sustainable tourism, while closely related, have distinct approaches and goals. Sustainable tourism focuses on minimizing the negative impacts of tourism on the environment, society, and economy, so that tourism can continue without causing long-term damage.

In contrast, regenerative tourism goes beyond sustainability by actively seeking to restore and rejuvenate the environment and communities affected by tourism. It emphasizes that tourism can have a positive impact on natural and social systems, acting as a catalyst to positive change.

Sustainable tourism is tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.

UN World Tourism Organization

Regenerative tourism is often described as a practice that seeks to leave destinations in a better state than they were found. It draws inspiration from regenerative agriculture, which emphasizes restoring ecosystems and enhancing biodiversity.

Global Sustainable Tourism Council

Figure 20 _ Moving toward a regenerative blue economy
Source: Authors & Gibbons (2020, p.4)

The juxtaposition of these two concepts highlights a shift in the tourism industry towards more holistic and impactful practices. While sustainable tourism is essential for maintaining the health of destinations, regenerative tourism offers a more proactive and transformative approach. By integrating regenerative principles, the tourism industry can play a crucial role in addressing global challenges such as climate change, biodiversity loss, and social inequality.

While these two concepts are distinct, there is overlap in the tools that are applied to achieve their goals. Regenerative tourism is also a much more recent concept, still being established as a market in its own right. It is therefore, at times, necessary to consider initiatives under the wider sustainable tourism umbrella when assessing the potential for tourism that is in alignment with the UN Sustainable Development Goals, while placing an emphasis on innovation and processes that take the additional steps from reducing negative impacts to generating positive and regenerative effects.

IV. REGENERATIVE TOURISM: A MULTI-FACETED OPPORTUNITY

A. POLICY AND REGULATION TO FOSTER REGENERATIVE TOURISM

The global tourism industry is undergoing a transformative shift toward regenerative and sustainable practices, driven by maturing regulations, frameworks, and voluntary initiatives.

Guiding this transition is the UNWTO Global Code of Ethics for Tourism originally launched in 1999, which provides a foundation for responsible tourism practices. This code was further complemented by voluntary schemes such as the 2008 Global Sustainable Tourism Council (GSTC) Criteria, which set global standards for hotels, tour operators, and destinations to follow. Costa Rica, for example, has been a pioneer in this space with its Certification for Sustainable Tourism (CST), established in 1997. The CST encourages tourism businesses to adopt sustainable models by emphasizing the responsible management of natural, cultural, and social resources.

The past couple of years have witnessed a strengthened emphasis on embedding clear sustainability and environmental performance criteria into international policies. Notably, the European Agenda for Tourism 2030 which was launched in May 2022 emphasizes sustainable tourism practices, focusing on reducing the environmental footprint of tourism, encouraging enhanced circularity, supporting local communities, and promoting cultural heritage preservation. This was followed by a United Nations declaration on "Enhanced Climate Action on Tourism" launched at COP29 in Baku, Azerbaijan, committing to make the sector more climate-friendly including a pledge to "implementing nature-based solutions, ecosystem-based approaches, restoring ecosystems, adopting innovative technologies", which garnered endorsement from over 50 countries. A notable example is Norway's decision to permit only zero-emissions cruise ships in its UNESCO World Heritage fjords starting in 2032—a move that could inspire similar policies worldwide. Other examples include countries like Vanuatu, and New Zealand (Aotearoa Island), and the Cook Islands are also leading the way with sustainable tourism legal frameworks, demonstrating how policy can drive meaningful change.

Another emerging policy lever applied to combat mass tourism is the implementation of tourist taxes, such as those in Venice or those planned for cruise passengers in certain Greek locations. Another example includes Bhutan's policy of "High-Value, Low-Impact" tourism which requires visitors to pay a daily fee, which funds sustainable development projects, environmental conservation, and cultural preservation. This model ensures tourism benefits local communities while minimizing overcrowding and environmental degradation.

These policies and initiatives reflect a growing global commitment to regenerative tourism, where the focus is on restoring ecosystems, empowering local communities, and creating a positive legacy for future generations.

ADOPTING REGENERATIVE TOURISM THROUGH POLICY

Tourism is primarily considered an economic activity by policy makers and is assessed for the potential contribution it can provide to the local or national economy. Integrating regenerative tourism considerations presents an opportunity to unlock synergies between the economic, social and environmental benefits of this sector.

ECO CERTIFIED MANA TIAKI

CASE STUDY

THE COOK ISLANDS

The Cook Islands shifted towards a regenerative tourism approach following COVID-19 and defined its key pillars in the Cook Islands Tourism Development Strategy. These consist of the 4 C's of wellbeing as per the Cook Islands: Community, Culture, Conservation and Commerce.

The Islands' main objective was to ensure that their tourism strategy aligns with their wider national sustainability strategy and the Pacific 2030 Sustainable Tourism Policy.

Through this policy, the Cook Islands are preserving Mana Tiaki, which is the guardianship for future generations whereby guardians ensure the indigenous and cultural knowledge of the environment and how to maintain a sustainable and respectful relationship is passed on and applied. This allows both an increased awareness and adoption of local values and practices by visitors towards the environment, while it preserves the heritage of local communities.

B. THE RISE OF REGENERATIVE TOURISM: HOW MARKET TRENDS AND CUSTOMER PREFERENCES ARE EVOLVING

THE SHIFT IN TRAVELER BEHAVIOR

In recent years, a significant shift in tourist behavior has emerged, driven by growing environmental awareness and a desire to contribute positively to local communities. According to Booking.com's 2023 Sustainable Travel Report, 76% of travelers now express a preference for sustainable travel options, with 43% willing to pay more for eco-friendly accommodations. Additionally, a report by the World Travel & Tourism Council (WTTC) highlights that 69% of global travelers actively seek experiences that minimize their carbon footprint, while 60% prioritize destinations that invest in environmental preservation and community well-being. This shift is also reflected in rising demand for regenerative tourism, where visitors not only minimize harm but also leave a positive impact—supporting conservation projects, choosing locally-owned businesses, and engaging in cultural preservation efforts. The trend is further reinforced by Gen Z, a generation growing up with climate consciousness at its core and redefining travel through a lens of responsibility and long-term sustainability. Unlike a passing fad, this movement signals a structural transformation in the tourism industry, pushing destinations and stakeholders to adapt to a new model of development where positive impact becomes the standard, not an exception.

PUBLIC AND PRIVATE SECTOR ENGAGEMENT

The tourism industry is undergoing a significant transformation, with regenerative tourism emerging as a key investment focus. While comprehensive data on regenerative tourism is still developing, the robust growth of sustainable tourism—projected to reach $8.7 trillion by 2030—suggests a parallel upward trend. This evolution signifies a shift from merely minimizing environmental impact to actively enhancing and restoring destinations.

Public and development finance institutions are increasingly allocating funds toward regenerative initiatives. For example, the World Bank's PROBLUE initiative and the Resilient Tourism and Blue Economy Development Project in Cabo Verde have collectively invested $75 million to bolster ocean-based economies. Moreover, the United Nations Environment Programme projects that private investment in nature-based solutions must escalate from 14% in 2020 to 40% by 2030, totaling approximately $8.1 trillion. This projection underscores a growing recognition among financial institutions of the importance of funding projects that deliver positive environmental and community outcomes.

A notable example of private-sector commitment to regenerative tourism is Red Sea Global, a development company spearheading the transformation of Saudi Arabia's Red Sea coast into a hub for regenerative tourism. Red Sea Global is investing heavily in biodiversity restoration, aiming to regenerate marine and coastal ecosystems while building a positive impact on nature. RETRACE Hospitality are also leading the charge by collaborating with impact-driven investors to infuse regenerative practices into hospitality developments such as the Una Bambu Bamboo Resort.

The convergence of public funding, private investment, and pioneering corporate initiatives highlights the burgeoning strength of regenerative tourism. As capital increasingly flows into projects that prioritize environmental restoration and community well-being, regenerative tourism is poised to become a cornerstone of the tourism sector's sustainable growth.

EMERGENCE OF AN ENABLING REGENERATIVE TOURISM ECOSYSTEM

Regenerative tourism is gaining momentum as a transformative approach that goes beyond sustainability, actively restoring ecosystems and empowering local communities. This shift is driven by a growing commitment from a diverse set of stakeholders working together to reshape the industry. Governments and policymakers are embedding regeneration into national tourism strategies, while certification bodies are setting new benchmarks for responsible travel. Investors and financial institutions are channeling funds into nature-based solutions, recognizing the long-term value of regenerative models. At the same time, accelerators and advisory firms are supporting entrepreneurs in developing scalable solutions, and hospitality groups are rethinking their business models to integrate restoration and community engagement. Research institutions, industry coalitions, and NGOs are further fueling this movement with data-driven insights, advocacy, and hands-on initiatives.

Regenerative tourism is becoming an integral part of the industry's future. As environmental and social challenges reveal the shortcomings of traditional tourism, the demand for innovative, restorative models is gaining traction. The market is expanding, supported by growing policy frameworks, investment mechanisms, and industry-wide commitments. With increasing alignment between public and private stakeholders, the ecosystem is maturing, creating favorable conditions for more strategic funding and large-scale implementation. The foundations for regenerative tourism are now stronger than ever, signaling a pivotal moment for its continued development.

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INNOVATIVE SOLUTIONS TO ACCELERATE THE TRANSITION OF THE INDUSTRY

V. REGENERATION IN ACTION

A. ACTIONS BY OPERATORS

ADOPTING REGENERATIVE TOURISM THROUGH MARINE PROTECTED AREAS

Protected areas are an important tool in international efforts to safeguard the oceans, and can play an important role in regenerative tourism by serving as natural sanctuaries that promote ecological balance and sustainability. Target 3 of the Global Biodiversity Framework contains a commitment to conserve 30% of inland water, coastal and marine areas by 2030, "through ecologically representative, well-connected and equitably governed systems of protected areas and other effective area-based conservation measures."

These areas, often rich in biodiversity, provide a unique opportunity for tourists to engage with nature in a way that fosters conservation and restoration. By prioritizing conservation and sustainable practices, protected areas can help regenerate natural habitats, support local communities, and offer tourists a meaningful and eco-friendly travel experience.

misool foundation

CASE STUDY

MISOOL

The private island resort Misool, in remote Raja Ampat, Indonesia, has established a privately funded marine reserve with two "no-take zones," where all extractive practices are prohibited. Misool also has a charity arm which implements conservation activities, including reef restoration, community engagement, and marine life protection.

misoolfoundation.org

HOLISTIC CORPORATE REGENERATIVE MEASURES/ STRATEGY

Operators who wish to effectively implement regenerative tourism need to account for a wide range of measures that go beyond mere sustainability. It requires a broad and holistic set of practices, including conservation efforts, community support, and innovative processes that not only reduce negative impacts but also create positive effects. These can address all stages of an organization´s development, from planning through construction and operations.

Soneva FOUNDATION

CASE STUDY

SONEVA

Soneva are the creators of luxurious and sustainable resorts, primarily in the Maldives but also internationally. They have been carbon neutral since 2012, with a mandatory 2% environmental levy added to every Soneva stay, with proceeds going towards the not-for-profit Soneva Foundation to offset both direct and indirect carbon emissions from resort activities and guest flights.

The Soneva Foundation supports the development of projects that have a positive environmental, social, and economic impact. The foundation uses impact investing principles, seeking to recover outlays through carbon finance, which are then reinvested into projects to extend their reach and benefits. These include coral reef restoration, including a coral nursery as well as knowledge sharing convenings, as well as community engagement and terrestrial ecosystem and wildlife restoration. Notable projects include the Myanmar Stoves Campaign, which distributes fuel-efficient cook stoves to thousands of families, forest restoration, hornbill reintroduction, and clean water projects.

soneva.com/foundation/

CASE STUDY

البحر الأحمر الدولية
Red Sea Global

RED SEA GLOBAL

RSG is working to embed regenerative environmental and social principles across the entire lifecycle of the development and operation of its extensive portfolio. Huge efforts have been made to ensure the use of sustainable construction materials, and operational assets are already powered by 100% renewable energy, thanks to 760,500 PV panels and 1,200+ MWh off-grid battery storage facility. In addition, active environmental and marine restoration efforts, such as coral nurseries, seagrass planting, and mangrove reforestation, are underway to restore the Red Sea coastline's fragile ecosystems, incorporating environmental protection into luxury tourism.

RSG prioritizes community engagement and empowerment in its strategic approach, believing in a relation between its success and that of the communities they operate in. It has launched multiple initiatives such as the English for Tourism program, equipping young Saudis with the skills necessary to thrive in the hospitality industry. It has also invested in programs such as The Red Sea Farm Cooperative (TAMALA), supporting up to 3,000 local farmers by enabling direct supply of their products to resorts and helping them introduce sustainable farming technologies.

redseaglobal.com/

INNOVATIVE INSURANCE FOR MARINE ENVIRONMENT PROTECTION

The business case for investing in nature has traditionally been a challenge across all industries. Increased awareness by tourists and a growing demand for responsible tourism, coupled with increased focus and introduction of policies requiring greater environmental stewardship by the tourism sector, regenerative tourism presents a unique opportunity to apply innovative financial mechanisms that deliver positive environmental outcomes while remaining commercially viable.

CASE STUDY

PACIFIC CATASTROPHE RISK INSURANCE COMPANY

Parametric Insurance for Fiji's Coral Reefs

WTW, a global advisory firm specialised in tourism, in collaboration with Vatuvara Foundation (VVF) and Pacific Catastrophe Risk Insurance Company, launched a first of its kind parametric insurance project in the Fiji Islands with the aim of protecting vulnerable coral reefs ecosystem. The project covers the protected natural reserve of Vatuvara Island, Yacata, and Kaibu which is part of the Vatuvara Private Islands Resort.

Unlike traditional insurance offering, parametric insurance is disbursed by threshold parameters, regardless of whether the negative impact occurs or not. In this case, the insurance payment is triggered by adverse climate events, specifically cyclones, and will be used mainly to support the rehabilitation of coral reefs as well as enhancing the local communities' resilience to the impacts of extreme weather events.

The participation of Vatuvara Private Islands Resort in this project highlights the co-benefits of partnering in projects of ecosystem rehabilitation which ensure the preservation of a tourism asset, while also supporting local communities.

B. CATALYZING INNOVATIONS

To address these challenges, innovative and sustainable solutions must be implemented across different areas of the tourism industry. A combination of regulatory measures, technological advancements, and industry-wide commitments is necessary to shift towards a more regenerative and resilient tourism model.

Innovation plays a crucial role in catalyzing regenerative tourism initiatives, driving both sustainability and community empowerment. Smart tourist flow management tools, such as real-time apps and platforms, can guide visitors to less crowded areas, easing the pressure on sensitive sites and improving the overall travel experience. Big data analytics offers valuable insights into visitation patterns and seasonality, allowing for better resource allocation and the optimization of tourism flows, ultimately leading to more sustainable destinations. Additionally, IoT sensors enable environmental monitoring, tracking real-time data on water, air, and biodiversity quality to detect potential issues early, allowing for proactive measures to protect local ecosystems.

AI technology further contributes to sustainability by optimizing water and energy usage in accommodations and other tourism services, minimizing carbon footprints and supporting greener operations. Virtual reality (VR) and augmented reality (AR) provide immersive experiences, offering tourists a way to explore fragile sites remotely, reducing the physical strain on sensitive areas. Lastly, blockchain technology ensures transparency by recording investments in regenerative projects, allowing tourists to track the impact of their contributions on conservation and community development. These technological innovations are transforming how tourism interacts with the environment, creating a more sustainable, regenerative future for the industry.

The section below highlights case studies where solutions have been successfully developed and deployed to deliver on the objectives of regenerative tourism while also unlocking opportunities under the blue regenerative economy.

HARNESSING NATURE-BASED TECHNOLOGIES FOR REGENERATIVE TOURISM

Regenerative tourism has the potential to drive positive change by embracing nature-based solutions that not only address environmental challenges but also create new opportunities for sustainable economic development. By investing in the power and wisdom of nature, the tourism industry can unlock a wide range of benefits, from cost savings and resource efficiency to the creation of innovative products and services.

Among the compelling examples is the use of bamboo-based sewage treatment systems, notably seen in Kenya and France, replacing conventional sewage treatment plants with a calm and scenic forest. By utilizing the natural filtration capabilities of bamboo, these systems not only open the possibility to have 100% reuse water with utmost quality but also generate valuable byproducts like building materials, activated charcoal, or textiles. This approach transforms waste into a source of renewable resources, enabling tourism businesses to generate new revenue streams while supporting hotel operators, and also broaden local economies while reducing their environmental footprint tourism while also unlocking opportunities under the blue regenerative economy.

CASE STUDY

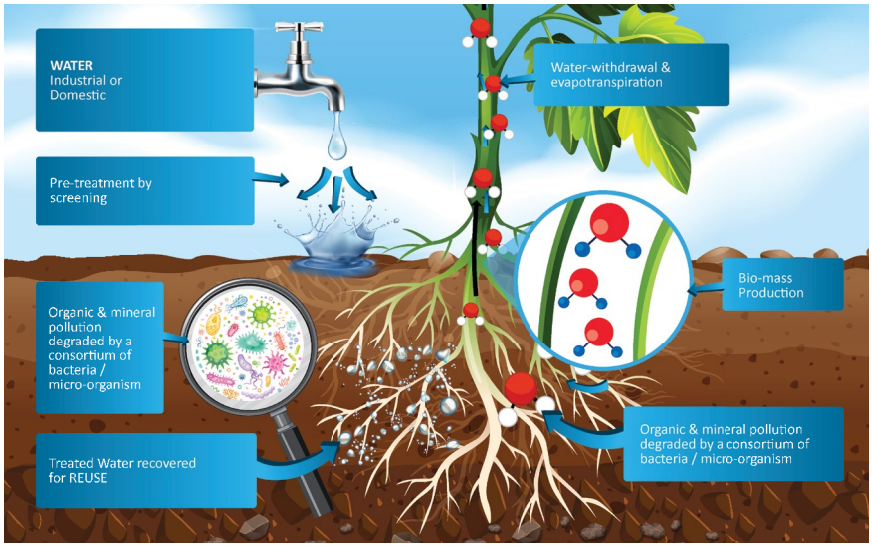
Bamboo Water Treatment

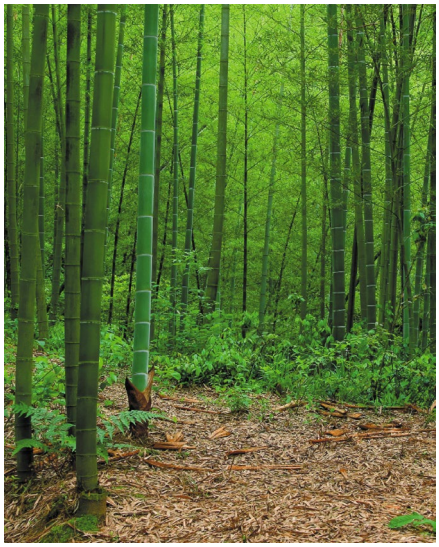
Bamboo offers a cost-effective, nature-based solution for wastewater treatment with multiple benefits:

- Treats water to reuse standards through natural filtration processes.
- Generates valuable byproducts like building materials and biochar.
- Has very low energy consumption and maintenance requirements.
- Provides a natural air-cooling system through canopy effect and evapotranspiration.
- Sequesters CO2 and improves microclimate.

The dense canopy of bamboo plantations reduces heat by up to 30% compared to surrounding areas. Shaded areas can offer 80% sunlight reduction, creating a comfortable microclimate.

By integrating this regenerative system, developments can recover water, produce resources, enhance ecosystems, and create a natural cooling amenity, all while treating wastewater efficiently.





Source: Bamboo for Life, bambooforlife.fr/comment-ca-marche

Biotechnologies and biomolecules derived from natural sources offer another promising avenue for regenerative tourism. For instance, certain species of plants or microorganisms produce compounds with potent medicinal properties, such as anti-inflammatory, anti-cancer, or antimicrobial effects. By partnering with biotechnology firms and research institutions, tourism projects can support the sustainable cultivation, extraction, and commercialization of these valuable bioactive compounds, creating a new market for nature-based pharmaceuticals and nutraceuticals. Similarly, biopolymers and other biomaterials derived from renewable feedstocks like algae or agricultural waste can be used to develop biodegradable packaging, construction materials, or consumer products, providing alternatives to fossil fuel-based plastics and reducing waste in the tourism supply chain.

In terms of energy solutions, regenerative tourism can harness the power of renewable resources like geothermal, hydro, or biomass. Geothermal energy, for example, can be used to heat and cool buildings, provide hot water, or even support spa and wellness amenities, offering a clean and reliable source of thermal energy. Small-scale hydro systems can be installed in streams or rivers to generate electricity for off-grid tourism facilities, while biomass gasification can convert organic waste into syngas for cooking, heating, or power generation. By investing in these decentralized, locally appropriate energy solutions, tourism businesses can reduce their carbon footprint, enhance their resilience to external shocks, and support the development of community-scale clean energy infrastructure.

The key is to think holistically and creatively about how nature-based solutions can be leveraged to create value across multiple dimensions – environmental, social, and economic. By adopting a systems-based approach that integrates these solutions in context-specific ways, regenerative tourism can amplify their collective impact and catalyze transformative change. Destinations that harness the power and potential of nature-based technologies can become powerful models of regenerative development, inspiring replication and scaling around the world.

Ultimately, by investing in the wisdom and abundance of natural systems, regenerative tourism can create a more resilient, equitable, and flourishing future for all – one where people and planet thrive together in harmony, sustained by the innate regenerative capacity of the living world.

CASE STUDY

البحر الأحمر الدولية Red Sea Global

RED SEA GLOBAL

Mangroves as a Coastal Defence Strategy

Red Sea Global is leading one of the largest mangrove restoration projects in the world.

The company has developed a 1 million m² mangrove nursery, which has already grown 3 million mangroves, which are now being transplanted across its destinations.

The restoration program is an essential part of its regeneration ambitions because mangroves are vital coastal ecosystems, particularly in tropical regions. These unique trees play a crucial role in carbon capture, absorbing carbon dioxide from the atmosphere and storing it in their biomass and the soil beneath them. They hold up to four times more carbon than tropical rainforests. They also protect coastlines from erosion and storm damage, and support fisheries and filter pollutants from water.

Working in partnership with the National Centre for Vegetation Cover (NCVC), the initiative is strengthening coastal resilience, supporting marine biodiversity, and ensuring long-term environmental health.

redseaglobal.com

ECO-FRIENDLY URBAN DEVELOPMENT

As tourism expands, urban development in coastal areas must be designed to minimize environmental impact while maximizing resilience. Nature-based solutions, such as restoring mangroves and seagrass beds, can act as natural barriers against coastal erosion and storm surges. Additionally, floating and elevated infrastructure can reduce land-use pressure while providing sustainable tourism opportunities. Cities like Amsterdam have pioneered floating architecture, demonstrating how urban expansion can be achieved without harming fragile ecosystems.

Regenerative architecture, which integrates sustainable materials, energy-efficient designs, and water recycling systems, can significantly reduce the carbon footprint of tourism facilities. Hotels and resorts must prioritize green building certifications to ensure compliance with environmental best practices. Furthermore, urban zoning regulations should enforce carrying capacity limits to prevent unchecked tourism expansion that leads to ecosystem degradation.

CASE STUDY

EConcrete

Econcrete's technology addresses the chemical composition of concrete, as well as its micro and macro surface, on a micro and macro level, to create nature-inclusive solutions for marine construction that enhance biodiversity

This promotes the growth of organisms like oysters, corals, or barnacles, which act as biological glue, enhancing the strength and durability of structures, and adding to their stability and longevity.

With over 40 projects worldwide, their solution can be added to regular concrete mix to create a chemically-balanced concrete. This enables healthy and diverse marine ecosystems to develop.

The macro design of Econcrete's molds and mold-inserts, enables the creation of ecological niches. These support the ecological uplift of infrastructure and provide added bioprotection, delivering increased strength and durability to the structure.

PLASTIC WASTE REDUCTION

The tourism industry is a significant contributor to plastic pollution, but innovative waste management solutions can curb its impact. Deposit return schemes (DRS), which incentivize tourists to return plastic bottles and other recyclable materials, have been successful in reducing waste and scaling these initiatives globally could dramatically cut plastic waste in coastal areas.

The transition to a circular economy is another effective strategy. Resorts and tourism operators can invest in closed-loop waste management systems, where plastic is repurposed into construction materials, textiles, or reusable packaging.

AI-driven waste collection technologies as well as autonomous floating devices that capture plastic waste in harbors and waterways before it reaches the ocean also represent very promising technologies.

recykal

CASE STUDY

Recykal

Recykal, India's first waste-commerce company, provides end-to-end digital solutions that connect waste generators, processors, recyclers and brand owners as well as facilitate material flows and transactions across the recycling value chain.

Their suite of services includes a digital Marketplace for recyclable waste, including plastic, a digital extended producer responsibility (EPR) management solution and a cloud-based software supporting the digitization of collection centers.

Recykal holds a unique positioning in India, partnering with more than 100+ Urban Local Bodies (ULBs), 125+ brands, 150+ recyclers, and above 500+ aggregators.

CORAL REEF RESTORATION

Given the alarming rate of coral reef degradation, urgent intervention is required to protect and restore these ecosystems. Coral gardening initiatives, where coral fragments are cultivated in underwater nurseries before being transplanted onto damaged reefs, have shown promising results in regions like the Caribbean and the Great Barrier Reef.

Innovative artificial reef structures made from sustainable materials can also provide new habitats for marine life and attract eco-tourists. Moreover, advancements in genetic research are allowing scientists to develop heat-resistant coral strains, which could help reefs adapt to rising ocean temperatures and prevent further bleaching events.

CORAL VITA

CASE STUDY

Coral Vita

Coral Vita, based in the Bahamas, creates high-tech coral farms that incorporate breakthrough methods to restore reefs in the most effective way possible. The scientific team has partnered with leading marine institutes, utilizing techniques to grow coral up to 50x faster while boosting their resiliency against the warming and acidifying oceans that threaten their survival. These corals are then outplanted back into degraded reefs, bringing them back to life.

Coral Vita's land-based farms not only supply corals for restoration projects, but also function as education centers for local communities as well as eco-tourism attractions. They can also scale to make a significant ecological difference, with a single farm able to grow millions of resilient corals for distribution around a region.

MITIGATING UNDERWATER NOISE POLLUTION

Noise pollution from marine traffic disrupts marine life, particularly species that rely on echolocation. Reducing noise pollution requires a combination of technological innovation and regulatory enforcement. Quieter ship designs, featuring propeller modifications and air bubble technology, can significantly reduce underwater noise emissions. Leading shipping companies are investing in such designs to align with sustainability targets.

The establishment of marine protected areas (MPAs) with strict noise restrictions can further mitigate the impact of tourism on marine life. Speed limits for motorized watercraft and designated no-motor zones have proven effective in areas like the Galápagos Islands, where marine biodiversity is strictly protected. Additionally, transitioning to electric or hydrogen-powered boats can reduce both noise and carbon emissions associated with marine tourism.

CASE STUDY

Evoy Vita

Vita is a marine technology company that develops and integrates high performance electric propulsion systems for commercial and recreational marine applications.

It has developed several products:

- A range of high performance 100% electric boats all featuring the revolutionary Vita Power system and compatible with AC and DC dockside charging networks.
- A global marine charging network partnering with marinas and electric boat owners.
- Taiga: a range of electric propulsion jet skis

CONTROLLING ALGAE BLOOMS

Harmful algal blooms (HABs) are fueled by nutrient pollution, often exacerbated by tourism-related wastewater discharge. Implementing advanced wastewater treatment systems that remove excess nutrients before they reach the ocean can prevent these destructive events. Phytoremediation, using plants to absorb and filter contaminants, has shown promise in reducing nutrient runoff from agricultural and urban sources.

Artificial upwelling systems, which bring nutrient-poor deep-sea water to the surface, can also help regulate algae growth by altering nutrient availability. Moreover, innovative algae harvesting techniques are turning a problem into an opportunity.

CASE STUDY

CARBONWAVE

CarbonWave

CarbonWave is turning the Sargassum blooms, affecting tourism destinations in the Caribbean, into a business opportunity.

Sargassum doesn't need land or other inputs to grow, making it an ultra-regenerative and adaptive plant-based resource.

The company collects the seaweed on beaches for the account of hotels and resorts, and process them into a range of sustainable products, such as bio stimulant for agriculture, emulsifiers for the cosmetics industry, as well as sustainable alternatives to single use plastics.

OCEAN DATA FOR SUSTAINABLE TOURISM

The integration of ocean data into tourism management is essential for monitoring the environmental impact of tourism activities and making data-driven policy decisions. Remote sensing technologies, including satellite imaging and underwater drones, provide real-time insights into ecosystem health, tracking changes in coral reefs, water quality, and coastal erosion.

Environmental DNA (eDNA) sampling is another revolutionary approach. By analyzing DNA traces in water samples, scientists can assess biodiversity levels and detect the presence of endangered species, offering valuable data for conservation efforts.

Artificial intelligence (AI) and big data analytics are also playing a crucial role in sustainability. AI-powered predictive models can forecast harmful algal blooms, allowing authorities to take preventative action before they occur. Similarly, AI-driven monitoring systems can assess tourism-related environmental pressures, guiding sustainable development policies. The use of blockchain technology in sustainable tourism certification ensures transparency and accountability, helping travelers make informed choices about eco-friendly tourism operators.

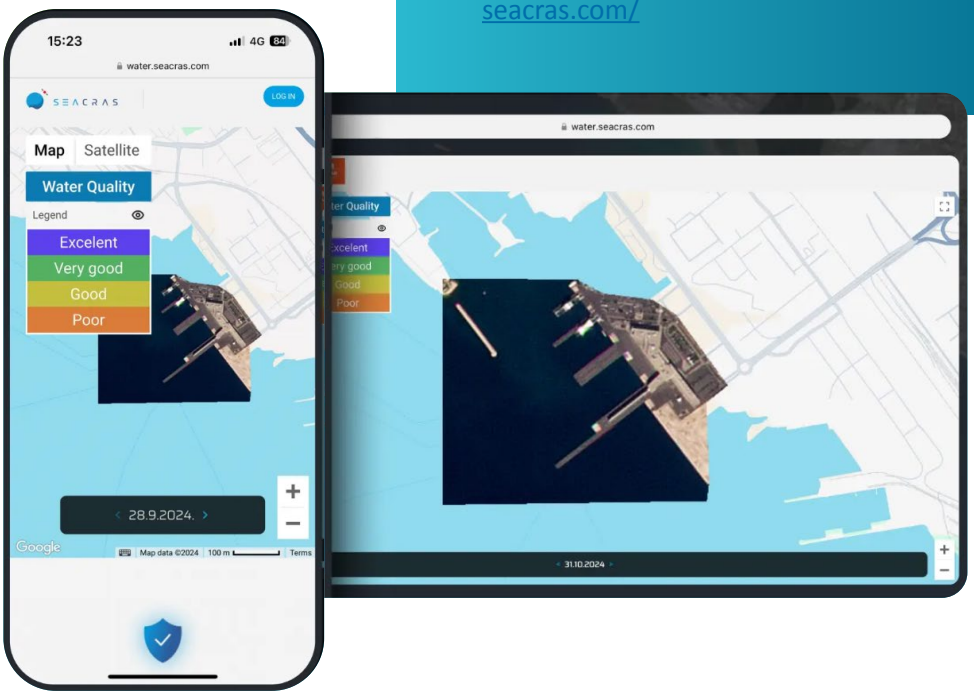
CASE STUDY

SeaCras

SeaCras, based in Croatia, connects travelers with authentic, community-driven experiences, protecting fragile coastal ecosystems while also empowering communities to thrive. It has adopted a model that embodies the principles of regenerative tourism by restoring coastal ecosystems, empowering local communities, preserving cultural heritage and educating travelers about the importance of sustainable coastal tourism and inspiring travelers to become advocates for regeneration.

Since its launch, SeaCras has partnered with over 50 coastal communities across 15 countries, driving significant positive impact including funding the restoration of 10,000 square meters of coral reefs and planting 20,000 mangrove trees, generating over $1 million in revenue for local communities and supporting 500+ livelihoods and reducing reliance on unsustainable practices like overfishing.

seacras.com/



GUIDING RESPONSIBLE TOURISM TO REGENERATIVE TOURISM DESTINATIONS

Coastal regions are among the most vulnerable to the negative impacts of tourism, including environmental degradation, overfishing, pollution, and economic inequality. Many coastal communities lack the resources to compete with large-scale tourism operators, leading to economic leakage and the erosion of local cultures. At the same time, travelers seeking meaningful experiences often struggle to find opportunities that align with their values.

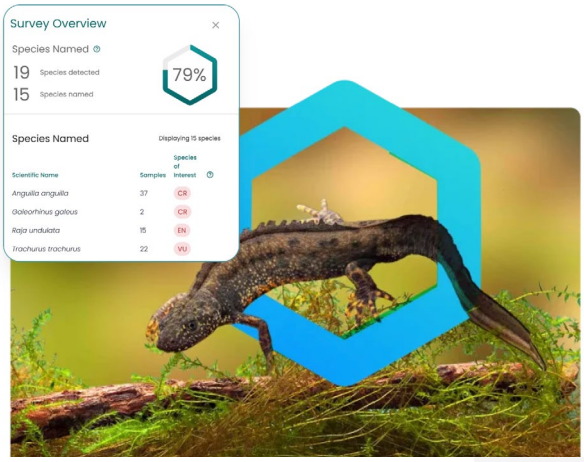
CASE STUDY

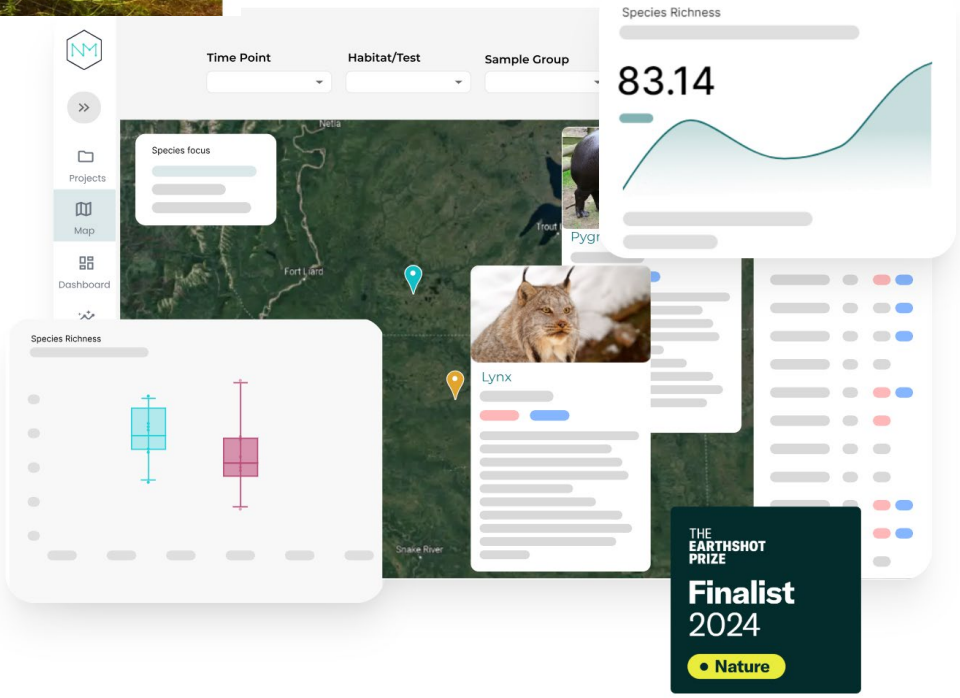
Nature Metrics

NatureMetrics Limited is a leading provider of biodiversity monitoring solutions, specializing in environmental DNA (eDNA) technology to deliver precise and actionable insights across terrestrial, freshwater, and marine ecosystems.

NatureMetrics' applications are vast, spanning ecological restoration monitoring, regulatory compliance for infrastructure projects, and rigorous reporting obligations under frameworks like CSRD, TNFD, and SBTN

The company plays a pivotal role across several sectors, including conservation, infrastructure development, energy, agriculture, forestry, mining, and water management.





VI. RECOMMENDATIONS: ADVANCING SUSTAINABLE TOURISM

To ensure a resilient and sustainable future for tourism, a multi-faceted approach is required. The following recommendations focus on four key areas: growing the pipeline of companies that accelerate the industry's transition, raising awareness among institutional and private investors to channel more capital into sustainable solutions, engaging hospitality institutions to drive adoption, and advocating for stronger regulations to stimulate industry-wide action. These strategies will help create a more sustainable, regenerative tourism sector that balances economic growth with environmental and social responsibility.

RAISING AWARENESS AMONG INSTITUTIONAL AND PRIVATE INVESTORS

Investors play a crucial role in financing the transition to sustainable tourism, but many institutional and private investors remain unaware of the economic potential of green tourism solutions.

Developing clear investment frameworks aligned with ESG standards and frameworks such as TNFD and CSRD will provide investors with clarity on sustainable tourism investments.

Showcasing successful sustainable tourism ventures can demonstrate the business case for investing in this sector, engaging impact funds, private equity firms, and venture capitalists in high-profile investment summits. Investor education through briefings, conferences, and roundtable discussions can further increase understanding of the sector's opportunities.

Launching thematic impact funds targeting sustainable tourism businesses with a focus on regenerative practices, ocean conservation, and resource-efficient hospitality solutions would also ensure capital flows into the right areas. Blended finance models that combine private investment with philanthropic and public sector funding can help de-risk investments, utilizing mechanisms such as green bonds, concessional loans, and results-based financing to support early-stage companies.

Large hospitality brands also have a role to play in investing in green technology companies, providing both capital and opportunities for pilot programs and direct implementation of new solutions.

GROWING THE PIPELINE OF COMPANIES

The transition to sustainable tourism depends on a strong pipeline of innovative companies that provide solutions to mitigate environmental impacts, enhance conservation efforts, and promote resource efficiency. Supporting startups and entrepreneurs developing sustainability solutions is essential, and governments, accelerators, and venture capitalists must provide seed funding, mentorship, and access to networks.

Establishing innovation hubs dedicated to regenerative sustainable tourism would in turn facilitate collaboration between researchers, businesses, and policymakers, allowing new technologies to be tested and scaled. The tourism industry should also work closely with cleantech, marine science, and conservation organizations and policy makers to develop cutting-edge and locally-responsive solutions and enabling policies such as grants and economic incentives, while cross-sector partnerships can accelerate the deployment of AI-driven environmental monitoring, smart waste management, and carbon tracking tools.

Governments and international organizations should expand access to grants and subsidies for regenerative tourism solutions, ensuring that companies can scale their impact. Public-private partnerships can further co-fund projects that address pressing sustainability challenges, such as coral reef restoration, sustainable fisheries management, and renewable energy transitions within tourism infrastructure.

ENGAGING HOSPITALITY INSTITUTIONS TO DRIVE ADOPTION

The hospitality sector has a significant environmental footprint, but it also has the potential to drive widespread adoption of sustainability solutions. Developing industry-wide sustainability standards endorsed by major hotel chains, and tourism boards and international tourism organisations can create consistency in sustainability certifications and encourage compliance with best practices.

Strengthening supply chain sustainability is crucial, with hotels and resorts prioritizing sustainable procurement, from eco-friendly building materials to responsibly sourced seafood. Circular economy models need to be should be implemented, with closed-loop waste management, greywater recycling, and food waste reduction technologies becoming industry norms. AI-driven monitoring systems can optimize resource use and improve efficiency, while staff need to should be equipped with knowledge and tools to implement sustainable practices through enhanced training programs.

Recognizing and rewarding sustainability leaders with industry awards, financial incentives, and preferential marketing opportunities will encourage greater participation in sustainability efforts. Data collection and reporting must also be improved, with standardized reporting on carbon emissions, water consumption, and waste reduction increasing accountability. Encouraging guest participation in sustainability programs, such as opt-in towel reuse initiatives, carbon offset contributions, and voluntourism experiences, will further support responsible tourism. Finally, hospitality brands should pilot emerging technologies, such as AI-driven energy management systems, smart water monitoring, and sustainable aviation fuel integration, to accelerate industry transformation.

ADVOCATING FOR STRONGER REGULATIONS

While voluntary sustainability initiatives are valuable, regulatory frameworks play a crucial role in ensuring widespread industry action. Governments and international organizations must enact and enforce policies that push the tourism sector toward sustainability. Setting mandatory sustainability targets for tourism businesses, such as carbon neutrality commitments, zero-waste goals, and biodiversity conservation measures, will ensure industry-wide adherence to best practices.

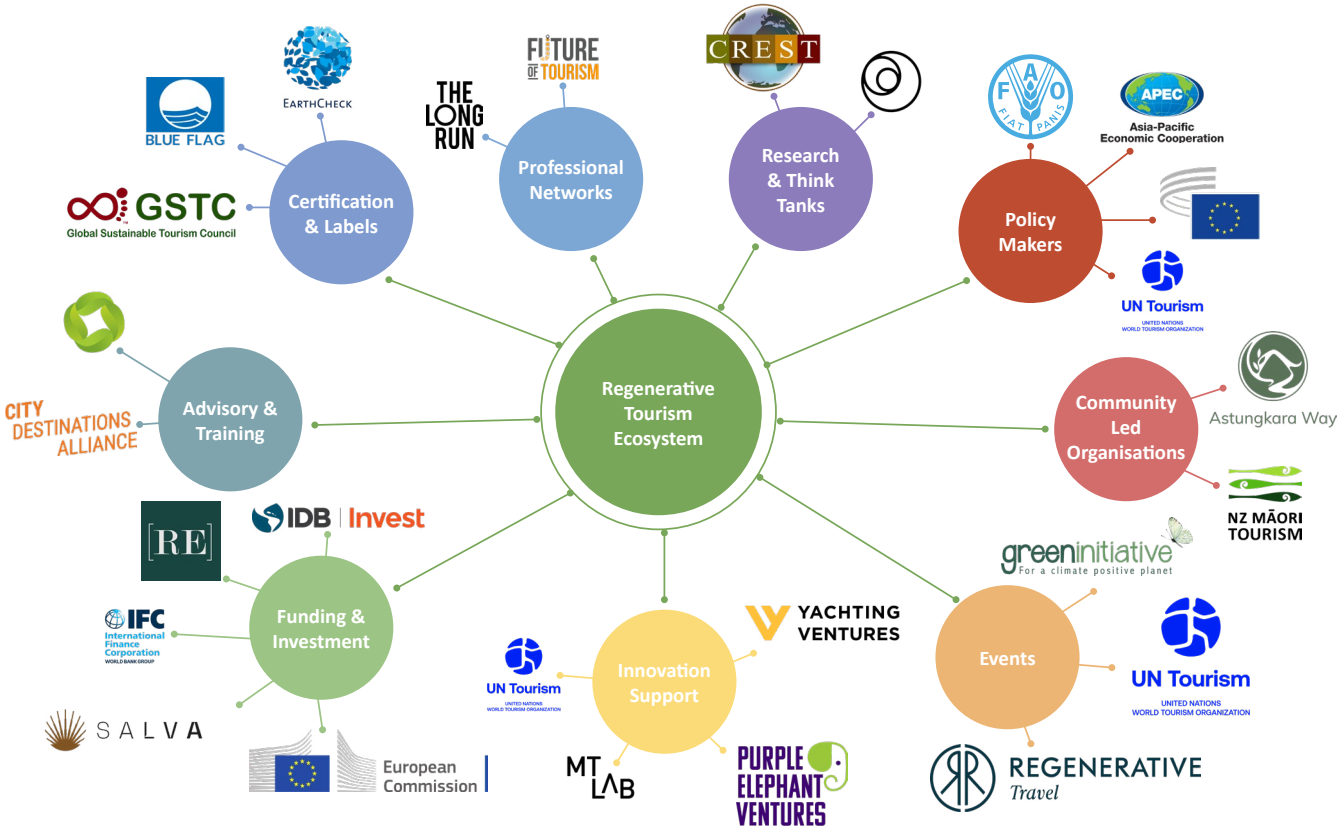
Strengthening marine protection laws by banning harmful activities such as anchoring on coral reefs, dumping untreated wastewater, and overfishing in protected areas is necessary to safeguard ocean ecosystems. Phasing out single-use plastics through national policies could also drive significant waste reductions.

Governments must also enforce carrying capacity limits in ecologically sensitive areas to prevent over-tourism and habitat degradation.

The promotion of sustainable marine transport through regulatory incentives would also be a game-changer to accelerate the adoption of electric boats, and sustainable fuel alternatives.

VII. APPENDIX

A. REGENERATIVE TOURISM ECOSYSTEM MAPPING



Stakeholder category	Organization	Brief description	Link
Policy makers	UNWTO	Promoted regenerative tourism through initiatives like the Glasgow Declaration and various reports on sustainable and community-driven tourism.	Glascow Declaration www.unwto.org/events/glasgow-declaration-regenerative-tourism-for-resilience-policy-practice-and-finance
	Asia-Pacific Economic Cooperation (APEC)	APEC has developed policy recommendations to promote regenerative tourism, focusing on sustainable practices and community involvement.	APEC Policy recommendations apec.org/meeting-papers/sectoral-ministerial-meetings/tourism/11th-apec-tourism-ministerial-meeting/policy-recommendations-for-tourism-of-the-future-regenerative-tourism?
	European Economic and Social Committee (EESC)	The EESC advocates for regenerative tourism to bolster both the economy and the environment, suggesting economic incentives and strategies for year-round tourism.	EESC calls regenerative tourism eesc.europa.eu/en/news-media/news/eesc-calls-regenerative-tourism-strengthen-economy-and-environment
	FAO	Linked regenerative tourism with sustainable agriculture, food systems, and rural community development.	FAO regenerative agro-tourism agro-tourism fao.org/mountain-partnership/news/newsroom/news-detail/56/en
Certifications & Labels	EarthCheck	A leading scientific benchmarking and certification group for travel and tourism, EarthCheck provides frameworks for regenerative tourism practices.	earthcheck.org
	Global Sustainable Tourism Council (GSTC)	GSTC establishes and manages global standards for sustainable and regenerative tourism, offering accreditation for certification bodies.	gstcouncil.org/
	Blue Flag	A voluntary award for beaches, marinas, and sustainable tourism boats. In order to qualify for the Blue Flag, a series of stringent environmental, educational, safety, and accessibility criteria must be met and maintained.	blueflag.global/
Events	Green Initiative	Hosting international webinars and discussions, the Green Initiative brings together stakeholders to explore investment opportunities in regenerative tourism.	greeninitiative.eco/2024/08/30/recap-webinar-on-regenerative-tourism-the-key-dimension-for-ecological-sustainability-and-business-competitiveness/
	Regenerative Travel Summit	An annual event that gathers industry leaders to discuss advancements and strategies in regenerative tourism, fostering collaboration and innovation.	regenerativetravel.com/impact/top-10-takeaways-from-the-regenerative-travel-summit-2024
	UNWTO Events	The United Nations World Tourism Organization organizes events focusing on regenerative tourism, such as discussions on policy, practice, and finance related to resilience.	unwto.org/events

Stakeholder category	Organization	Brief description	Link
Advisory & Trainings	Sustainable Tourism Consultants	Offering strategic development services, they advise governments and businesses on implementing sustainable and regenerative tourism practices.	sustainabletourismconsultants.com
	City Destination Alliance	Provides educational programs on regenerative tourism, including destination management and stakeholder engagement methodologies	citydestinationsalliance.eu/initiatives/regenerative-tourism-gds-academy
Funding & investment	SALVA	SALVA is an advisory and asset management organization with an ESG accreditation and blended finance platform dedicated to regenerative tourism. They mobilize resources toward high-impact projects focused on sustainability, biodiversity protection, culture, and territory.	salva.com
	Retrace Hospitality	RETRACE Hospitality specializes in regenerative hotel development, asset management, and strategic advisory services for both public and private sector tourism stakeholders. They partner with purpose-driven investors to develop positive-impact projects in hospitality, emphasizing eco-conscious, sustainable, and circular principles.	retracehospitality.com
	IDB Invest	IDB funds projects to advance clean energy, modernize agriculture, strengthen transportation systems and expand access to financing.	idbinvest.org/en/blog/development-impact/traveling-good-how-nature-based-tourism-regenerative-travel-can-drive?utm_source=chatgpt.com
	World Bank	PROBLUE is a Multi-Donor Trust Fund, housed at the World Bank, that supports the development of integrated, sustainable and healthy marine and coastal resources.	worldbank.org/en/programs/problue/overview
	Blue Invest	BlueInvest 'aims to boost innovation and investment in sustainable technologies for the blue economy' to deliver the EU's Green Deal priorities by supporting readiness and access to finance for early-stage businesses, small and medium-sized enterprises (SMEs), scale-ups and mid-caps (mid-capitalisation).	projects.research-and-innovation.ec.europa.eu/en/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe/restore-our-ocean-and-waters/blueinvest
Professional coalitions and networks	Future of Tourism Coalition	Advocates for a new model of tourism focused on sustainability and regeneration.	futureoftourism.org

Stakeholder category	Organization	Brief description	Link
	The Long Run	A global network of nature-based tourism businesses committed to sustainability and conservation.	thelongrun.org
Think Tank & research centers	Center for Responsible Travel (CREST)	Publishes reports and conducts research on regenerative tourism policies.	responsibletravel.org
	Global Development Research Center (GDRC)	Works on regenerative tourism policies and sustainable urban tourism models.	gdrc.org
Community led organizations	Māori Tourism (New Zealand)	Promotes Indigenous-led tourism initiatives that regenerate both the land and community.	maoritourism.co.nz
	Astungkara Way	Founded in Bali, It develops Regenerative Travel alternatives to support local culture and economies, which inherently includes preserving local agriculture and traditions.	astungkaraway.com/about-us
Innovation support	MT Lab	Fosters collaboration and innovation between destination stakeholders and entrepreneurs to strengthen Destinations with scalable, globally relevant innovations for good	mtlab.ca/en/regenerative-tourism-hub/
	Purple Elephant Venture	A venture studio based in Nairobi, Kenya focused on regenerative tourism start-ups.	purpleelephant.ventures/

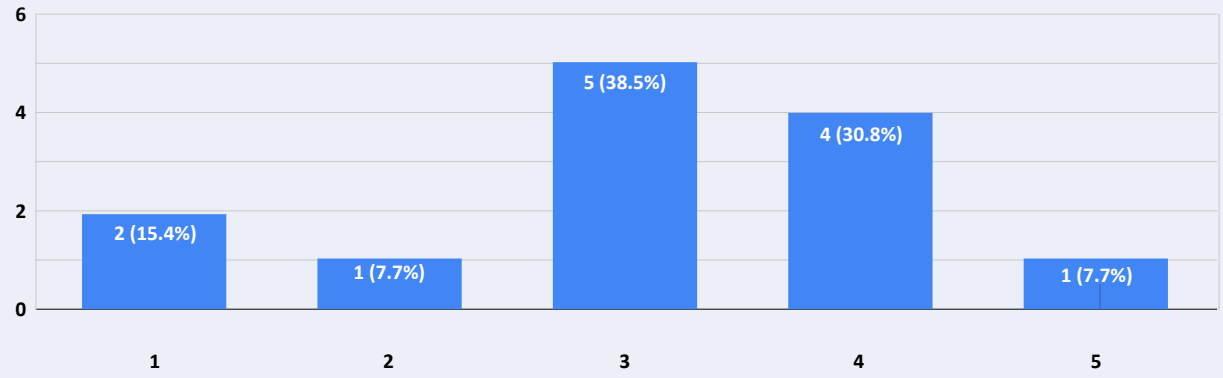
The mapping presented here is not exhaustive; it provides a snapshot of the current state of the regenerative tourism ecosystem. As this field evolves, new stakeholders will emerge, and existing ones may further expand their roles.

B. PRE-REPORT SURVEY RESULTS

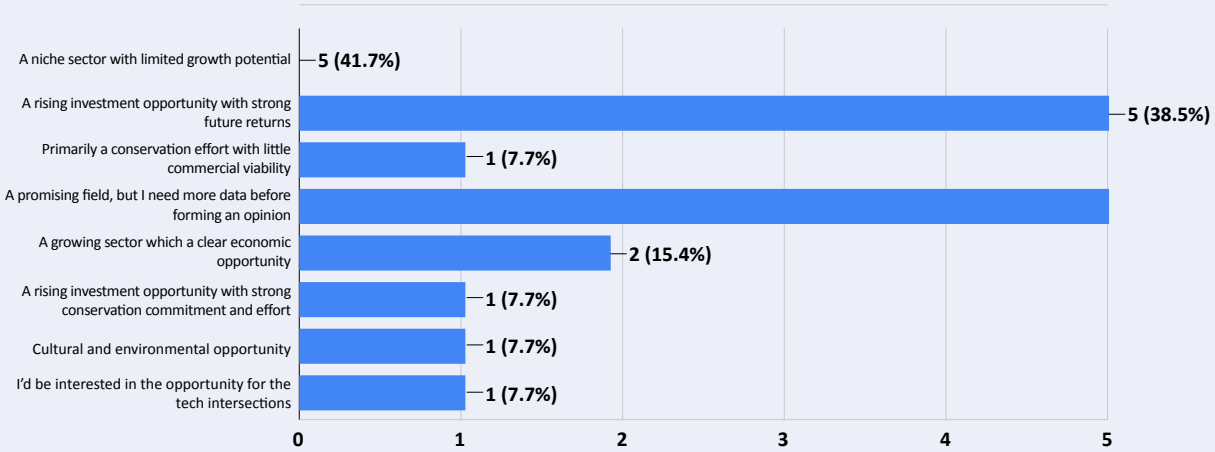
HOSPITALITY SECTOR ENGAGEMENT | PARTICIPANTS: 13

What is your primary area of activity?

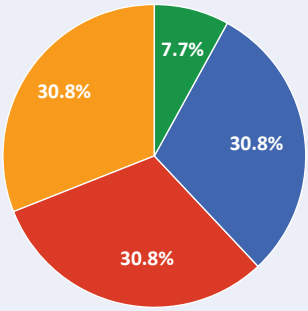
How familiar are you with regenerative tourism?



What is your perception of regenerative tourism?

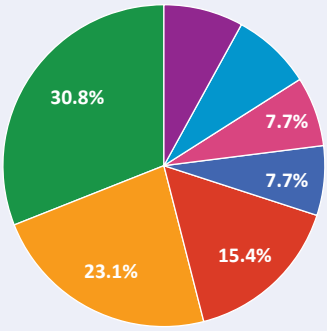


Have you adopted regenerative tourism measures and activities into your in-house practices and operations:



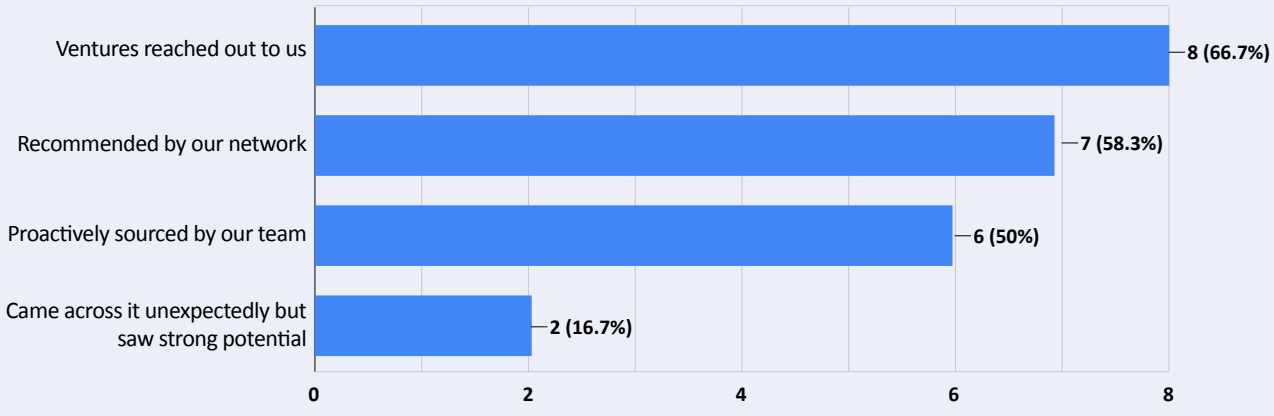
- Yes, we adopted significant measures around regenerative tourism
- We are in the process of considering some specific interventions
- No, we have not adopted any
- N/A

Have you collaborated with or invested in startups or scale-ups that provide innovative solutions to comply with regenerative tourism frameworks?

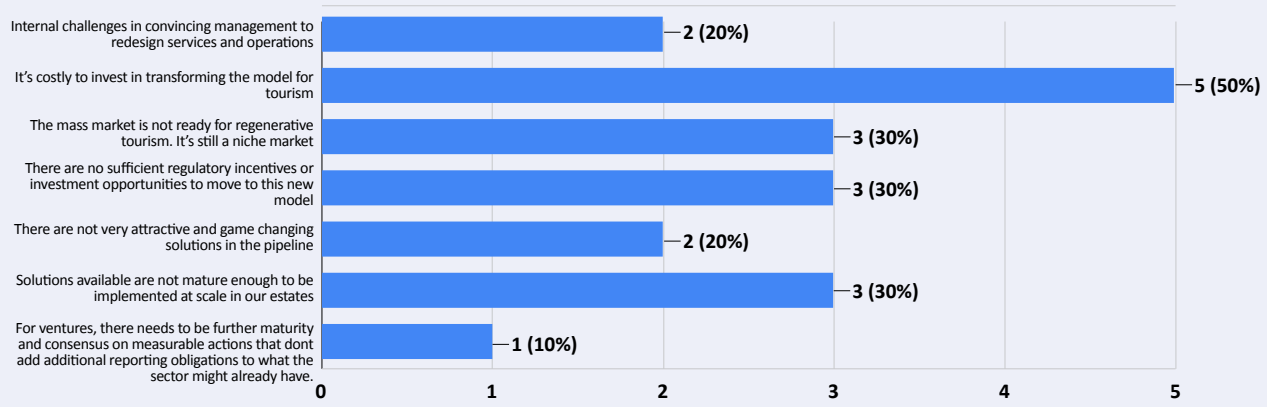


- No, this is outside our scope
- No, but we are exploring opportunities in this space
- We are sourcing these startups but have not invested yet or worked with them
- Yes, we are actively shifting our activity and therefore investing/supporting in this sector
- Yes, we have collaborated with the association BEMED for a special project, we were a pilot hotel for the reduction of single-use plastics.
- I formed a group from the community in 2011 called Jeddah's Heart to revive the historical area in order to establish regenerative tourism
- Yes, we have investments in this space but it's not a shift it's the reason we were formed

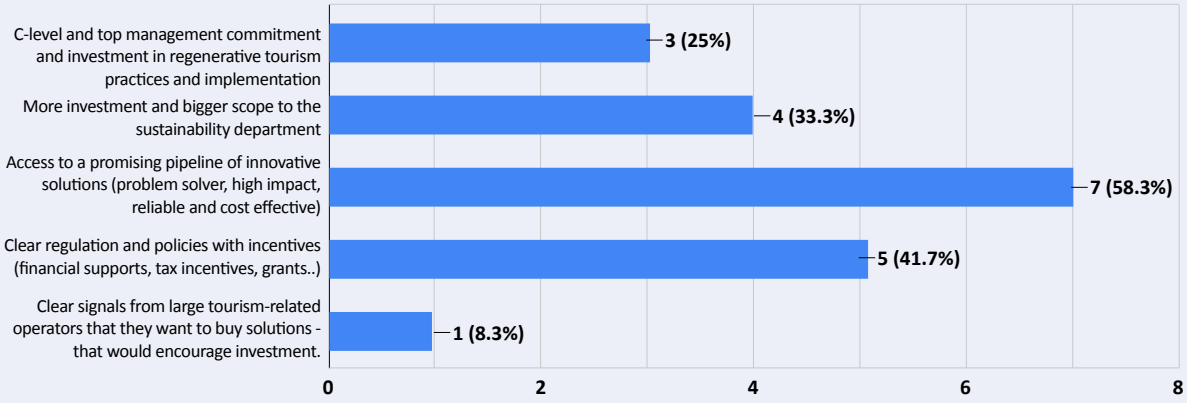
If you have already collaborated with regenerative tourism ventures, how have you sourced and identified the opportunities?



What are the main challenges that refrain you from collaborating with such ventures and investing more into regenerative tourism models?



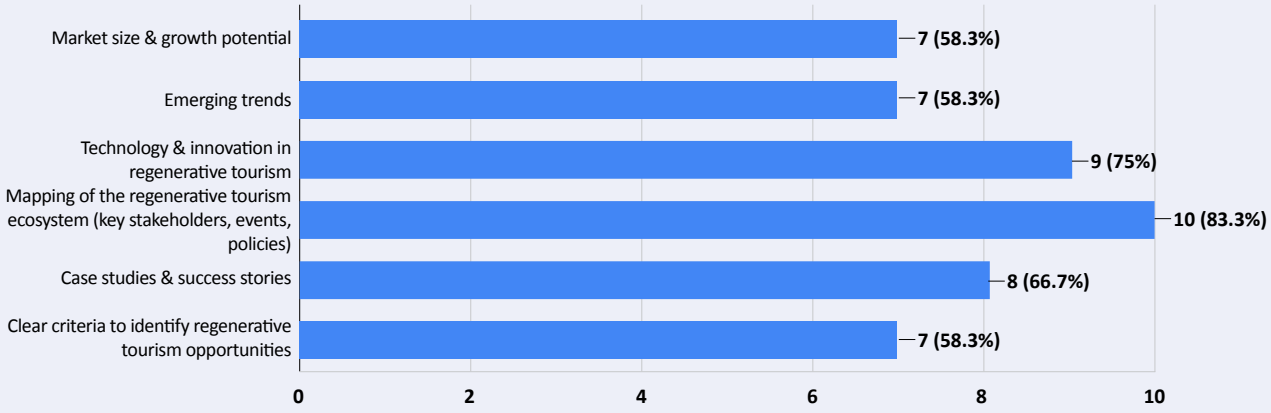
What would accelerate the adoption of regenerative tourism focused innovation within your organization?



Are you interested in learning more about regenerative tourism and its economic potential?

33

What insights and data would be most valuable to you?

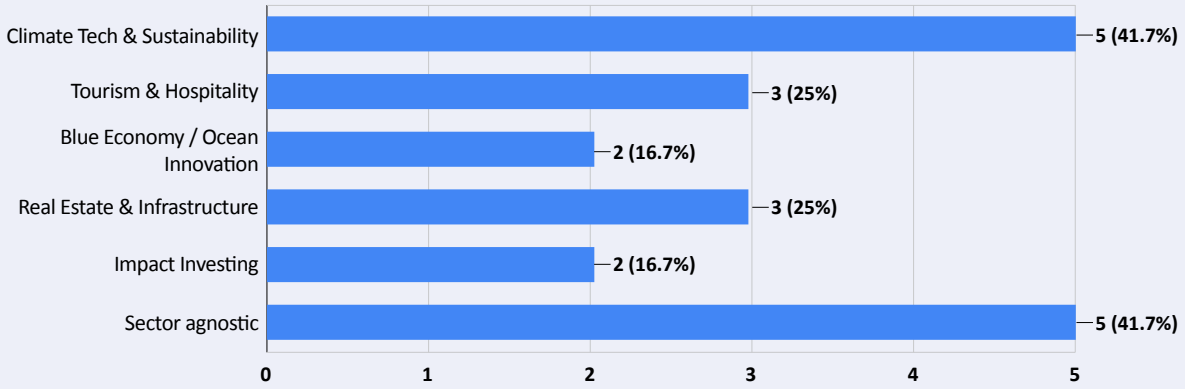


Would you like to be part of an exclusive working group, gaining access to the latest insights and joining an industry roundtable?

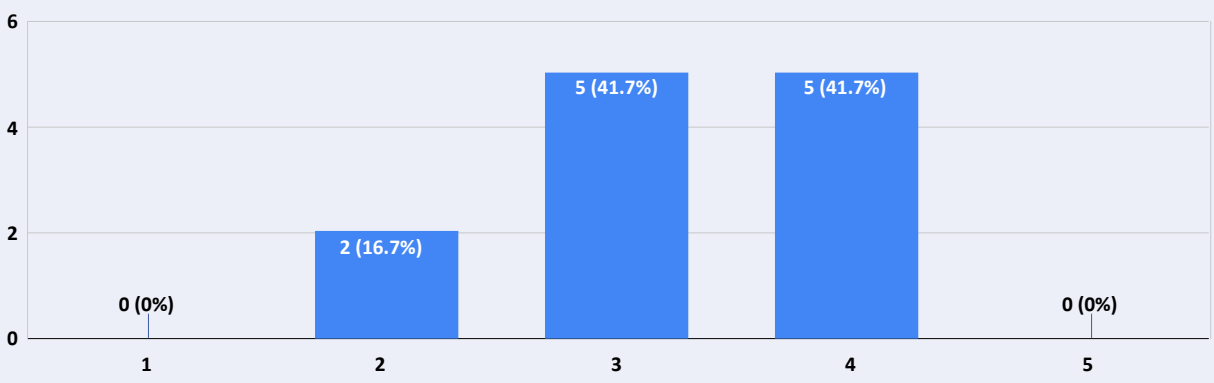
INVESTORS ENGAGEMENT | PARTICIPANTS: 12

What is your primary area of activity?

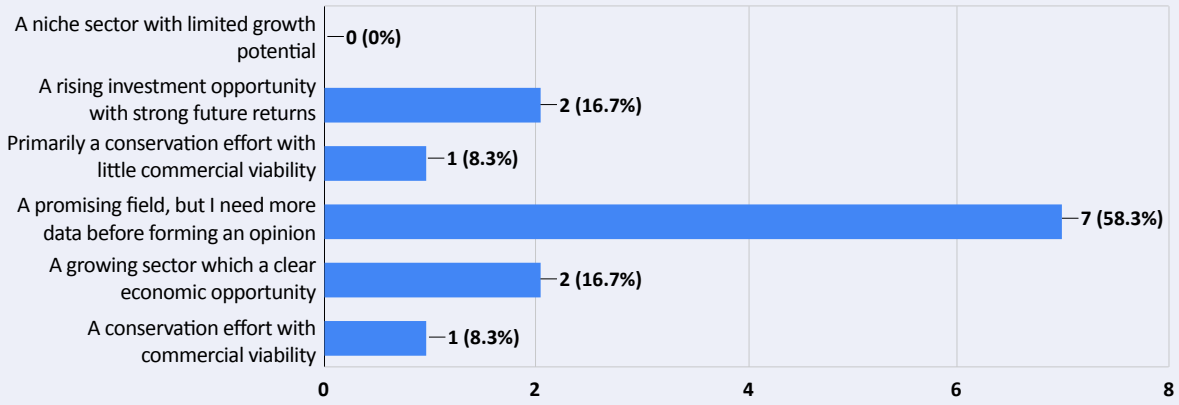
What are your main investment or business focus areas?



How familiar are you with regenerative tourism?

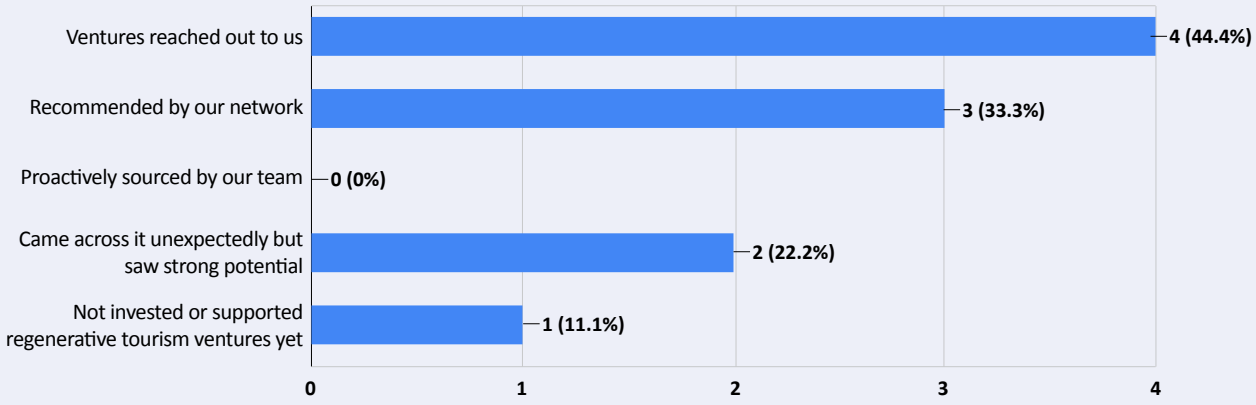


What is your perception of regenerative tourism?



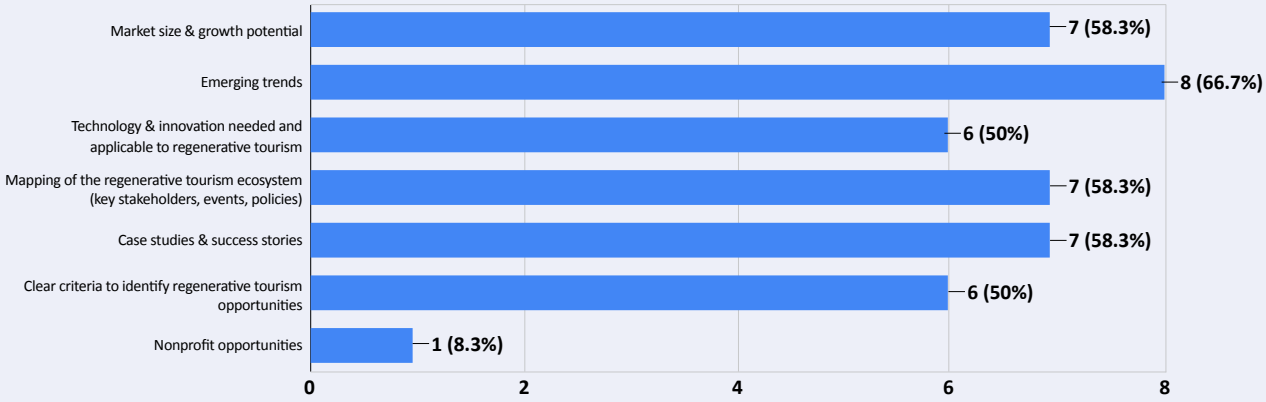
Have you invested in regenerative tourism startups or scale-ups?

If you have already invested or supported regenerative tourism ventures, how have you sourced and identified the opportunities?



Are you interested in learning more about the regenerative tourism industry and its economic potential?

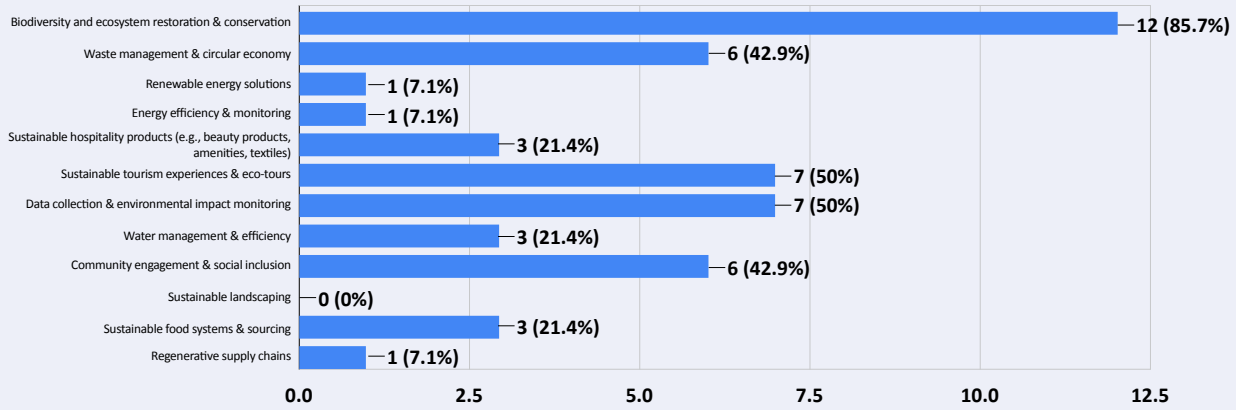
What insights and data would be most valuable to you?



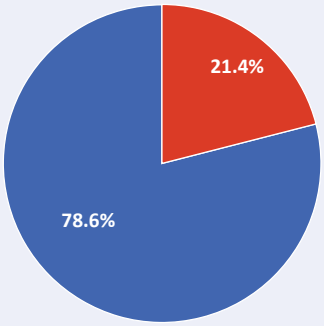
Would you like to be part of an exclusive working group, gaining access to the latest insights and joining an industry roundtable?

INNOVATORS ENGAGEMENT | PARTICIPANTS: 15

Which sub-industries does your solution address within regenerative tourism?

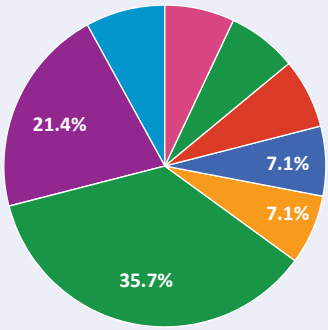


Does your solution contribute to regenerative tourism?



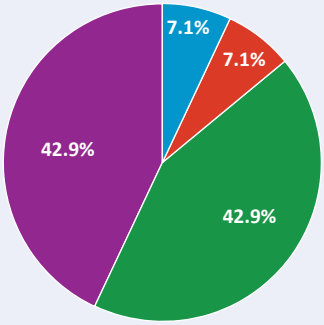
- Yes, my solution fits in the regenerative tourism definition
- I am building a sustainable product and I am interested to apply it to the tourism industry
- No
- I don't know

Have you secured funding to develop and scale your solution?



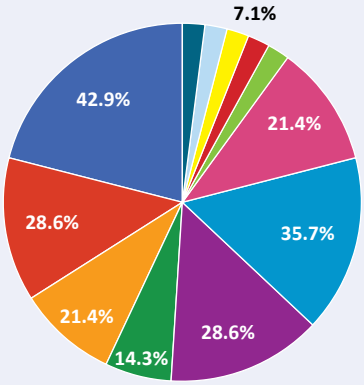
- No, I have not started outreach for funding
- No, I am struggling to raise funds
- Yes, through public grants and philanthropy
- Yes, from early-stage investors
- Yes, I have raised multiple investment rounds
- We have secured early stage funding to prove the technology, but struggle to raise funds to scale. We have a large pipeline and lots of demand, however, the investment community shuns hardware enabled deeptech companies.
- We are at the beginning stage of fundraising
- Yes, project based financing
- We raised from both public grants and VC investors. We are raising a round now for growth

Are you generating revenue?



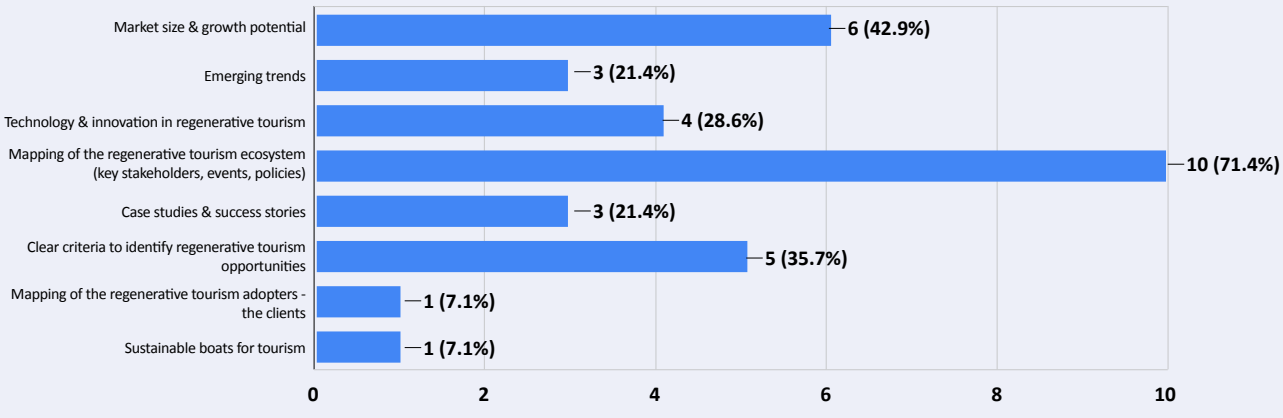
- No, still in the development phase
- No, securing deals in the hospitality sector is challenging
- No, but I am testing my product, and success could lead to business deals
- Yes, I have my first client(s)
- Yes, I am expanding into new markets
- We are in negotiations for a deal

What are the biggest challenges in raising funds?



- Limited awareness of regenerative tourism's potential in the industry
- Slow adoption of regenerative tourism compared to other industries
- The tourism industry is mature and resistant to innovation
- Regenerative tourism is perceived as competing with traditional tourism
- Lack of regulatory incentives to transition to regenerative tourism
- Few industry-focused investors and funds with relevant expertise
- Limited exposure opportunities for startups in hospitality and investment circles
- Adopters are often reluctant to get the proof that marine environment is degrading and that in long term they will suffer both financial and environmental losses, hence they should invest to mitigate.
- Our blended approach between business and positive impact challenges traditional silos, where commerce and philanthropy have long operated separately.
- Investors typically do not invest in adaptive hardware-enabled DaaS systems
- Not fitting within the box
- Educating the market about broad range of advantages of blue solutions for the hospitality industry

What insights and data would be most valuable to you?



Would you like to be part of an exclusive working group, gaining access to the latest insights and joining an industry roundtable?

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