



CONSCIOUS TRAVEL GOES MAINSTREAM

2021 ASIA-PACIFIC TRAVEL + RESORT DEVELOPMENT TRENDS

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In January, Chris Panfil, Vice President and Director of Planning + Urban Design at WATG Singapore, participated in the Urban Land Institute Philippines' Emerging Trends in Real Estate® Asia Pacific 2021 meeting. Tourism trends impacting the region today, and their implication on the future of hospitality and real estate design, is a topic that WATG continuously researches and monitors. In this document, Chris and Guy Cooke of our Strategy team outline five key trends to watch in 2021.



Chris Panfil

*Vice President
Director of Planning + Urban Design*

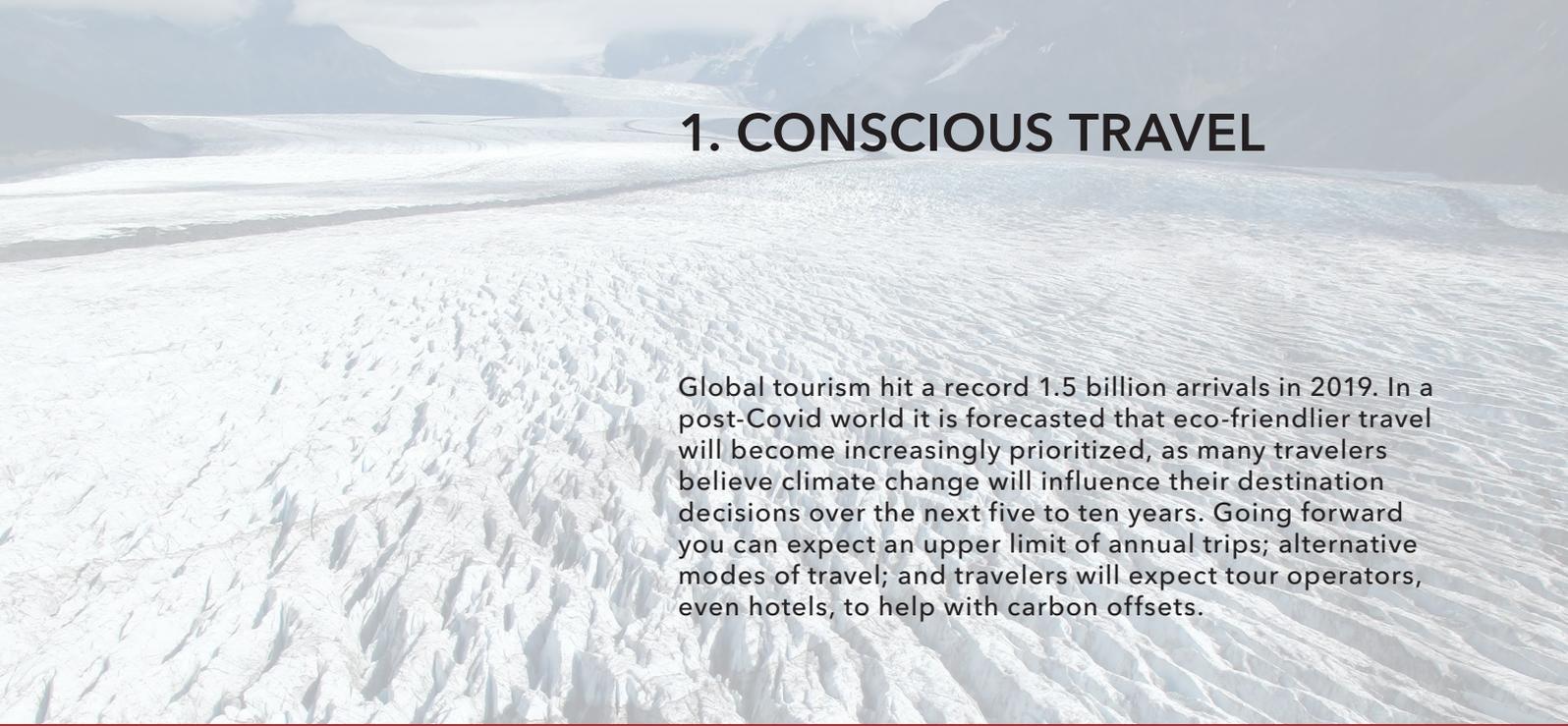
A member of WATG's Board of Directors, Chris's professional experience exceeds 25 years and includes master planning and urban design work for new communities, resort towns and villages, as well as planning strategies for cultural tourism destinations and regional development initiatives. He has worked throughout Asia, Europe, the Middle East, North and East Africa, and Latin America.



Guy Cooke

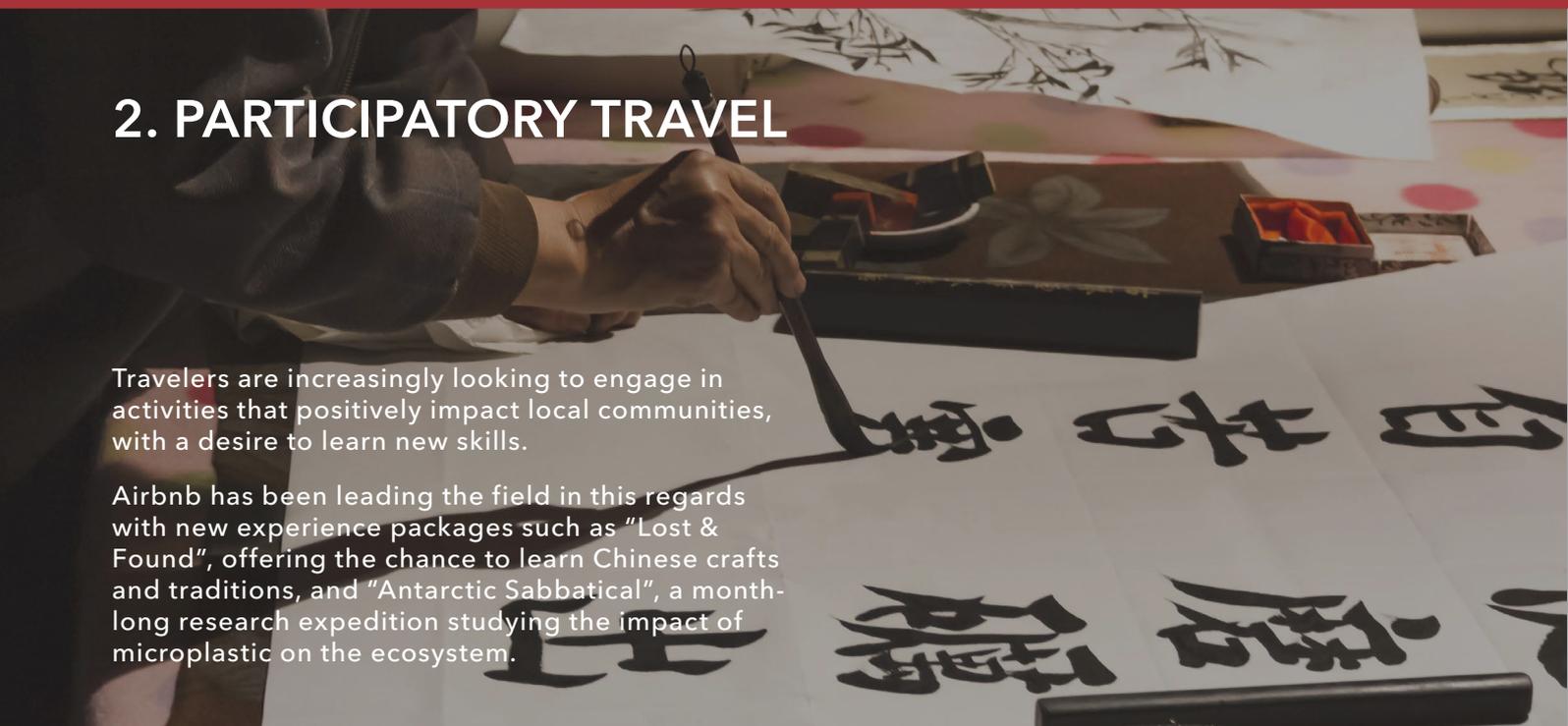
*Senior Associate
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Guy Cooke heads up the Strategy Division in WATG's Singapore office. He has worked globally on an extensive array of projects, with a focus on market analysis, development strategy and financial feasibility for the hotel, resort, branded residential, mixed-use and attraction sector. He is an avid follower of lifestyle and sector trends which he always looks to incorporate into creative client solutions.



1. CONSCIOUS TRAVEL

Global tourism hit a record 1.5 billion arrivals in 2019. In a post-Covid world it is forecasted that eco-friendlier travel will become increasingly prioritized, as many travelers believe climate change will influence their destination decisions over the next five to ten years. Going forward you can expect an upper limit of annual trips; alternative modes of travel; and travelers will expect tour operators, even hotels, to help with carbon offsets.



2. PARTICIPATORY TRAVEL

Travelers are increasingly looking to engage in activities that positively impact local communities, with a desire to learn new skills.

Airbnb has been leading the field in this regards with new experience packages such as "Lost & Found", offering the chance to learn Chinese crafts and traditions, and "Antarctic Sabbatical", a month-long research expedition studying the impact of microplastic on the ecosystem.



3. VOLUNTOURISM

As volunteering trips grow in popularity, hotels and operators are taking note. Many are incorporating 'social good' activities, community outreach and charity into their business models. For example, Six Senses Yao Noi offers volunteering opportunities, such as, teaching at a local school.

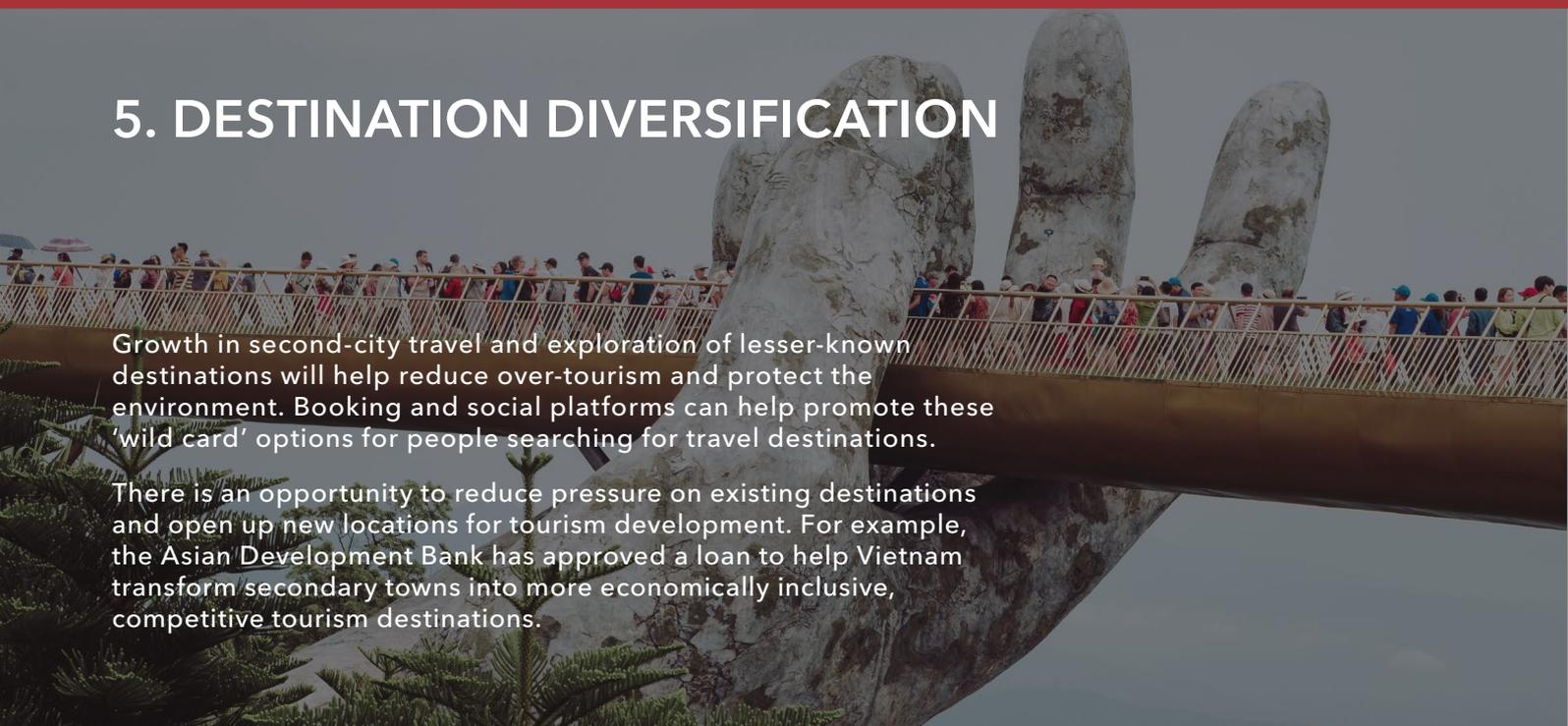
However, some traditionally successful attractions do not fit into this growing trend and have seen a negative impact on attendance due to their lack of eco credentials, animal welfare concerns, and other similarly topical agendas.



4. DESTINATION AWARENESS

As tourism overcrowding increasingly influences travelers' choices, a destination's success can no longer be judged by arrival statistics - the focus will need to shift to an alternative set of metrics, such as average length of stay, expenditure and guest satisfaction.

One example is Boracay Island in the Philippines, which received two million visitors in 2017, although its ecosystem can only support half a million. To mitigate this, the island was closed to tourists for six months for an intensive clean up operation. It reopened with caps on visitor numbers and a more stringent environmental framework in place for on-island stakeholders. Other sensitive landmarks are introducing entrance fees and restrictive access, turning these sites into exclusive destinations for luxury travelers.



5. DESTINATION DIVERSIFICATION

Growth in second-city travel and exploration of lesser-known destinations will help reduce over-tourism and protect the environment. Booking and social platforms can help promote these 'wild card' options for people searching for travel destinations.

There is an opportunity to reduce pressure on existing destinations and open up new locations for tourism development. For example, the Asian Development Bank has approved a loan to help Vietnam transform secondary towns into more economically inclusive, competitive tourism destinations.



IMPLICATIONS

Sustainable design must be genuine and verifiable - "greenwashing" no longer passes muster with the new generation of travelers.

In a world where the only certainty is uncertainty, there is opportunity for both repurposed and new buildings to be designed with "general purpose" in mind, to ensure flexibility for the future.

Decentralization is a common theme witnessed at both the micro and macro level of destination development. At a regional planning level, the opening of a new set of secondary tourism sites creates opportunities for effective design that avoids the pitfalls of unplanned growth, ensuring sufficient infrastructure is in place to support future expansion of demand. At the project level, this is reflected through spacing of amenities while improving public realm and landscape design, bringing the added benefit of enabling visitors to "socially distance", preferably outdoors.

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