Rebuilding tourism in Asia-Pacific: A more conscious traveller?

Preface

This report by Economist Impact, and sponsored by Airbnb, explores the recovery of tourism in the Asia-Pacific region. It looks at ways in which travel could change with the rise of the conscious traveller. The report is based on extensive desk research and a survey of more than 4,500 travellers from across the region. The report was written by Siddharth Poddar and edited by Pratima Singh.

We would like to thank the following contributors for providing additional insights:

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- Rachel Dodds, director, Sustaining Tourism and professor, Ryerson University

- Randy Durband, chief executive officer, Global Sustainable Tourism Council

- Philip Goh, regional vice-president, Asia-Pacific, International Air Transport Association

- Freya Higgins-Desbiolles, lecturer of tourism management, University of South Australia's Business School

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Executive Summary

Covid-19 has changed travel in many ways. Since the onset of the pandemic—which has had a devastating impact on human life and society—travellers are thinking more about the impacts of their holidays on communities, local economies and the environment. Although these discussions picked up in the past few years, the pandemic has resulted in a travel awakening of sorts and accelerated the push towards more conscious, responsible travel in Asia-Pacific.

An Economist Impact survey of more than 4,500 travellers in the region—across Australia, Japan, India, Malaysia, the Philippines, Singapore, South Korea, Taiwan and Thailand—shows that more than 7 in 10 (71.8%) respondents agree that covid-19 has changed the way they think about sustainable tourism by making it more important to them.

The numbers are even more striking in some countries, with 98.5% of respondents in the Philippines, 96.5% in India and 93.5% in Malaysia saying the pandemic has changed the way they think about sustainable tourism, and well over four in five citing the need for more sustainable tourism practices.

Could we be witnessing the dawn of a period of more conscious travel?[1] Our survey results certainly suggest so, with well over half (57.1%) saying they think differently about tourism and how to do it sustainably, especially as it relates to the local economy, communities, cultures and the environment.

Conscious travel takes centre stage

The vast majority of our respondents say it's important that their travel creates a positive impact for locals. When we peer closer at the data, we find that 57% of tourists want to avoid contributing to overtourism, while 69.9% say they are likely to avoid travelling to crowded destinations. A similar percentage (71.7%) are saying they are more likely to travel to destinations that allow them to avoid crowded spaces.

This is a recurring theme in our interviews with travel industry experts who see a clear desire among travellers to visit places that are less crowded and have more space. It is therefore unsurprising that 49% of respondents say they will travel more frequently to rural locations that are not very popular among tourists, a move

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[1] Through this research, the terms "conscious travel" and "sustainable travel" are used interchangeably.

that naturally overlaps with the quest for more domestic travel.

Our survey indicates that, going forward, a good chunk of travel budgets will go towards domestic travel, with 57.6% of respondents saying they will allocate a greater share of their travel budgets to domestic travel in pursuit of experiences off the beaten track. These unorthodox experiences could have a related impact on the diversity of available tourist experiences and destinations, and reduce the pressure on popular locations.

Part of this renewed focus reflects in a heightened consciousness among most travellers for the need to factor in communities that are in need of economic recovery where they travel, and how they spend their money.

It isn't just about the economics and livelihoods. Almost two-thirds (63%) want to use travel as a way to meaningfully connect with other communities and cultures. These travellers express a desire to be more conscious about familiarising themselves with the needs and requirements of local communities.

Understanding sustainability holistically

Whenever there's talk of sustainability in tourism, much emphasis is placed on environmental aspects such as avoiding single use plastics or reducing one's carbon footprint. Our survey, however, shows that travellers in Asia-Pacific are thinking about sustainability in travel in a holistic way. To illustrate, when asked what the two most important aspects of sustainable tourism are, economic aspect (46.7%) and social aspects (41.3%) came out on top ahead of environmental (32.1%), and cultural (31.6%) and community (21.5%) considerations.

Prior to this unprecedented moment, the travel industry—from customer to company—has largely centred questions of sustainability around the economy or environment. Increasingly, however, we see evidence that travellers are

also thinking about how they can make better choices that take into account the needs of local communities, economies, cultures and heritage.

We might think of this as the advent of regenerative tourism, where travellers attempt to balance their desire for exciting experiences with the potential impact on the greater ecosystem.

Travelling sustainably with technology

Technologies—both basic and emerging, innovative ones—are shaping travel behaviours and habits and strongly supporting the push towards more sustainable tourism practices, our survey finds. A very substantial 86.9% of respondents agree that technologies are enabling or can enable sustainable tourism.

Whether it is travel operators being enabled to adopt more sustainable practices, or travellers being able to make more informed choices when they travel, technology is enabling sustainable, conscious travel. This is happening in multiple ways, but generally speaking, operators and travellers are using technology to disseminate and access information near-instantaneously.

According to our research, almost half (43.1%) of respondents say technology makes the tourism industry more inclusive by enabling more local stakeholders to benefit.

Technology can be a great tool in supporting more sustainable travel practices in the years to come, and covid-19 has catalysed the implementation of some of these technologies, providing a peek into what the future of travel could look like.

The future of travel

Most travellers are thinking more deeply about the implications of their travel choices, with a majority (54.5%) saying they are willing to a pay a premium for tourism experiences that support sustainable practices. Conversely, a similar share of travellers expresses a willingness to avoid

destinations that fail to address sustainability-related issues.

Our research makes evident travellers' desire to be more conscious in their travel choices, but translating this intent to real change on the ground necessitates a strong commitment on the part of all stakeholders, from tourists to operators and local governments. Conscious travel choices cannot be made in a vacuum because these decisions are related to what options are available, from transportation, accommodation, food and waste services, and businesses' commitment to sustainable practices.

This is why governments and operators must take an active role in reshaping the industry.

There are some hopeful signs for change, as several governments across Asia-Pacific are playing key roles in terms of greater stakeholder engagement and better communication and planning.

But old habits die hard, goes an adage. Once the impacts of the pandemic—and the memory of it—recede, it is possible travellers will fall back into the same habits once again.

The rise of the conscious traveller in the Asia-Pacific region provides an opportunity to rebuild tourism in a holistic, sustainable manner. It is an opportunity that must not go abegging.

Rebuilding tourism in Asia-Pacific: A more conscious traveller?

Tourism and travel have played a major role in defining the modern era—by opening up communities and economies, broadening our understanding of not just our world but also each other. Growing incomes, the proliferation of low-budget airlines and the role of technology in disseminating information about new destinations, all resulted in a surge in travel.

However, the spread of the covid-19 virus closed the door on international travel, leading to a major impact on a thriving industry. All regions across the world recorded huge slumps in the number of international tourists, with Asia-Pacific registering the biggest hit, an 82% drop in 2020 compared to 2019.[2]

Those are devastating numbers for a region where the travel and tourism industry is a major growth driver and job creator. According to Liz Ortiguera, chief executive officer of the Pacific Asia Travel Association (PATA), the Asia-Pacific's tourism economy was the fastest growing in the world, contributing around 10% of the region's overall GDP and over 180 million jobs in 2019.

"Despite the pandemic, Asia-Pacific remains the largest region for the sector's employment employing 55% of the global travel and tourism workforce," she says.

The onset of covid-19, however, sparked an industry-wide reckoning that we are only just beginning to understand.

Who is the "sustainable traveller"?

The perception of what a "traveller" looks like has changed. "From a recent study I did, there are three types of tourists. First, there's people who don't care at all; then, there are those who will do the easy thing; and finally, there's the 'sustainable tourists'," explains Rachel Dodds, the director of Sustaining Tourism and a professor at Ryerson University. "[Sustainable tourists] will change their behavioural styles because of their beliefs or values or because it's the right thing to do."

Sustainable tourism isn't just a buzzword but an approach for thinking about how travel can positively impact local communities from economic, health, cultural and social perspectives.
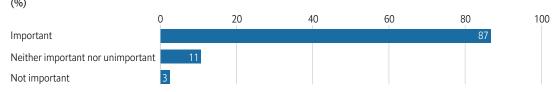
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[2] https://www.weforum.org/agenda/2021/05/covid-19-travel-tourism-virtual-reality/

Today, conversations around sustainable tourism have taken centre stage: an Economist Impact survey of more than 4,500 travellers across Asia-Pacific[3] finds that more than half

(52%) of respondents say sustainable tourism is very important to them, with just 2.5% who say it isn't at all important.

Figure 1: Everyone's talking about sustainable tourism
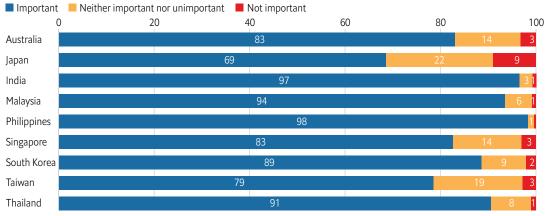How important is sustainable tourism to you? Please select one.
(%)

Source: Economist Impact.

There are differences across the region, however, with a much larger share of travellers from the Philippines (80.2%) and India (78.6%) saying sustainable tourism is very important

to them, reflecting Ms Dodds' view that the idea of sustainable tourism—and one's understanding of it—cannot be applied across the board.

Figure 2: The desire for conscious tourism cuts across geography
How important is sustainable tourism to you? Please select one.
(%)

■ Important ■ Neither important nor unimportant ■ Not important

Source: Economist Impact.

Similarly, there is a variance in opinion along generational lines: while 62.1% of millennial and 55.5% of generation Z respondents say sustainable tourism is "very important" to

them, only about a third (33.6%) of baby boomers feel the same way. This isn't to say that sustainable tourism isn't important at all to baby boomers, for 44.4% of them

say it is somewhat important to them. The not-so-subtle difference in views is likely a reflection of generational divides on issues such as climate change, but respondents are unanimous when it comes to whether or not the pandemic has changed how they think about travel.

Seven in 10 (71.8%) survey respondents agree covid-19 has changed their thoughts around sustainable tourism, particularly those from India (89.3%), the Philippines (85%) and Malaysia (83.9%).
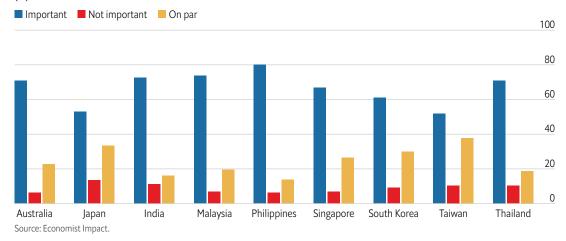
Overtourism takes a backseat

As part of the larger shift towards sustainable tourism, travellers are becoming more conscious about where and how they travel. There are many aspects to sustainable tourism, from environmental and economic impact to the ways in which international travel affects local life. When it comes to how travel is impacting local communities one visits, sustainable tourism is about creating a positive impact.

This aspect does seem to weigh on travellers' minds: more than two in three (66.8%) respondents say positive impact for locals will be a major factor when making travel plans. Filipino travellers (80%) are most concerned about this issue, followed by Malaysian (73.7%) and Indian (72.7%) travellers.

Figure 3: Locals matter
How important is creating a positive impact for locals?
(%)

■ Important　■ Not important　■ On par

Source: Economist Impact.

Overtourism—when a certain destination becomes too crowded with visitors, leading to a cascade of other problems—was a strong concern even before the pandemic. It is something travellers are thinking about, our survey shows. More than half (57.6%) of survey respondents say it's important that their travel does not contribute to overtourism, but the issue is of special concern among travellers from Thailand (66.3%), Taiwan (63.9%) and South Korea (63.1%).

Despite the overwhelming support for less overtourism, "there's still a long way to go" before we fix the problem, says Soity Banerjee, an independent travel writer and project

editor at the Outlook Responsible Tourism Initiative.

"Thanks to overtourism and waste and/or water issues in popular destinations, as well as a general increase in awareness, tourists are becoming open to doing small things like bringing back their trash or dry waste," she says.

"But scaling sustainable solutions and making tourism more socially- or economically-inclusive without changing the fabric of a place? It will take a lot of time, political will and focused communication to create a strong ecosystem of sustainable tourism and find a wider audience for it," Ms Banerjee adds.

More than a passing fad

Ecological concerns and covid-19 policies have played a major role in contributing to the mindset changes being witnessed. Possibly self-reflection too. Randy Durband, chief executive officer of the Global Sustainable Tourism Council, says "during the pandemic, all of our lives changed, and our thought processes changed. We've had time to reflect on the big picture. There's been a lot of soul searching, and travel has been a part of this."

Freya Higgins-Desbiolles, who is a lecturer of tourism management at the University of South Australia's Business School, visiting professor at Taylor's University and adjunct associate professor at the University of Waterloo, suggests environmental concerns lead many to consider how sustainable their travel is.
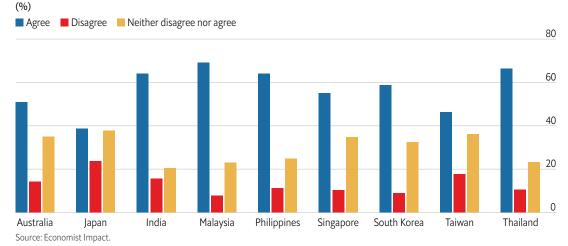
"Here in Australia, we had the bushfire crisis at the end of 2019, and then we went straight into covid," she says. "If you live in big tower blocks, that ability to go to a park or green space has really gained value. Covid has made us value nature more because of lockdowns," she adds.

Ms Ortiguera at PATA thinks that the shift towards sustainable tourism was well-underway before the pandemic. For her, covid just "highlighted the many vulnerabilities of our world and the many issues that the travel and tourism industry must address."

Our survey indicates sustainable tourism is more than a passing fad. Over half (57.1%) of respondents say sustainable tourism practices will factor into their holiday plans, an outlook strongest among Malaysian (69.2%) and Thai (66.3%) respondents. In comparison with their neighbours in Asia-Pacific, Japanese respondents come across as an outlier on issues relating to sustainable tourism: they are likelier to travel internationally rather than domestically, and only 38.6% say they will factor in sustainable tourism practices when vacationing next.

Figure 4: The next holiday will be different
I will now factor sustainable tourism practices into my holiday plans
(%)

■ Agree ■ Disagree ■ Neither disagree nor agree

Source: Economist Impact.

Travellers go off the beaten track

For Ms Ortiguera, the pandemic has inadvertently resulted in many silver linings by reducing overtourism, and dispersing jobs creation and the economic benefits of tourism spend, while supporting discovery beyond the heavily-trodden destinations.

"When rural areas become more accessible, it provides a higher quality of life for local communities and the overall destination by protecting its natural resources and cultural heritage," she says.
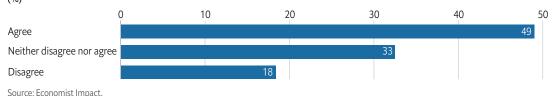
According to Gaurav Bhatnagar, director of The Folk Tales, which provides rural travel experiences in India, the impact of covid-19 is, in ways, "a fallout of our unsustainable lifestyles, including the way we travelled and the rate at which we consumed natural resources and products".

"This revelation is evident in the conversations we have been having with our clients [travellers]," he says, and they are now placing greater emphasis on dealing with overtourism by exploring rural areas. "One of the reasons is to naturally maintain social distancing. The other is to not use natural resources more than what we can regenerate."

It is therefore not surprising to see a renewed focus among travellers in Asia-Pacific to seek out rural locations beyond traditional and popular bucket list destinations. Our survey finds that one in two (49%) respondents wants to seek out more experiences in rural, less touristy locations. Thai travellers are especially enthused, with 59.2% saying they will travel more frequently to rural locations.

Figure 5: Far from the madding crowd
I will travel more frequently to rural locations that are not very popular among tourists
(%)

Agree	49	
Neither disagree nor agree	33	
Disagree	18	

Source: Economist Impact.

By age group, 53.4% of millennials and 50% of Generation Z respondents want to frequent rural locations, while the share of baby boomers that says it will be keen to holiday beyond urban locales is 37%. This could potentially due to a lack of facilities and creature comforts needed by senior travellers, and in a covid context, the desire to visit destinations with sound healthcare infrastructure.

Rural travel is already seeing an upsurge in interest, thanks to covid-inspired safety, health and environmental concerns. In 2020, Vietnam's government launched a campaign to encourage locals to travel domestically with cheap airfares and support for small businesses,[4] likely catalysing rural tourism in the process. Similarly, the Tourism Authority of Thailand, in 2020, launched rural tourism awards and an investment fund for local communities that preserve culture and heritage.[5]

These kinds of initiatives could be a boon for local communities and governments severely hit by the pandemic by opening up new sources of income through tourist spending.

The overtourism debate has acquired new, more complex dimensions thanks to the increased risks posed by covid-19, leading many to consciously choose to steer clear of very popular destinations.

"Social distancing and personal hygiene protocols could become important factors when tourists start to return," says Philip Goh, regional vice-president, Asia-Pacific at International Air Transport Association (IATA). Our survey finds that seven out of ten people are more likely to travel to destinations that are not crowded (69.9%), while 71.7% also say they are more likely to explore options to avoid travelling to crowded locations.

A community-centric approach to travel

But sustainable travel isn't just about overcrowding; it's also about how tourism impacts local communities. Our survey shows there is a growing consciousness in travellers about how their dollars can support communities struggling economically due to the pandemic. More than half the respondents say they would factor in a community's economic recovery when making their travel plans and budgets, and over 60% say these

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[4] https://www.adb.org/news/op-ed/domestic-tourism-southeast-asia-opportunities-and-pathways-matthias-helble-and-jaeyeon
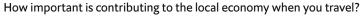[5] Ibid.

issues will be important factors in deciding where and how they travel in the future.
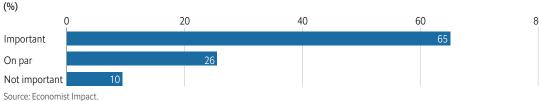
Mr Bhatnagar says "travellers are asking specifically for homestays and activities that benefit locals directly. This is a huge shift because the traveller is becoming aware of what to ask for."

For most (65.1%) of our respondents, active contributions to the local economy are very important. These conscious travellers express a desire to not just contribute to rural and local communities, but to also learn and familiarise themselves with local cultures as a way to develop meaningful relationships with the residents there. Almost six in 10 (59.5%) of travellers say they want to serve local people while 63.3% find it important to use travel as a meaningful way to connect with other communities and cultures.

Figure 6: Thinking local
How important is contributing to the local economy when you travel?
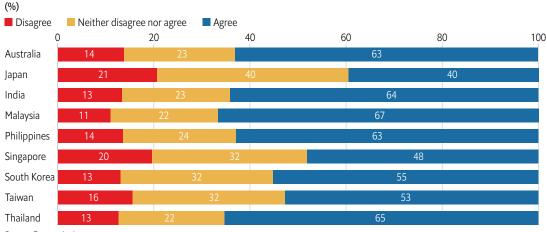(%)

Source: Economist Impact.

Building meaningful relationships and learning about local cultures through travel ranks highly among Indian (74.8%) and Filipino (74.2%) travellers in particular. Australian respondents, from a perspective of mutual solidarity, are overwhelmingly in agreement with the idea of travelling with the intention to support local communities. More than three-fourths (77.5%) say they will adopt travel practices that will contribute to local economies in the future.

This behaviour, according to Ms Higgins-Desbiolles, was borne out of the Australian experience of the pandemic. Prolonged travel restrictions have become widely accepted among Australians, many of whom are looking to "support fellow Australians by traveling more in the regions and spending the money so that it stays in the economy".

Our survey finds that more than half of all travellers plan to spend either the same or more on their next holiday compared to what they would have spent pre-pandemic. Moreover, 57.6% of respondents say they plan to spend more on domestic tourism. Two-thirds (66.7%) of Malaysian respondents say they would travel more locally—with 65.3% of Thai and 64.1% of Indian respondents echoing this sentiment—as would a majority of millennials (60.3%) and parents with young children.

Figure 7: A preference for domestic travel
I will take more domestic travel moving forward than previously and allocate more of my budget on travel within my own country
(%)

■ Disagree ■ Neither disagree nor agree ■ Agree

Country	Disagree	Neither disagree nor agree	Agree
Australia	14	23	63
Japan	21	40	40
India	13	23	64
Malaysia	11	22	67
Philippines	14	24	63
Singapore	20	32	48
South Korea	13	32	55
Taiwan	16	32	53
Thailand	13	22	65

Source: Economist Impact.

However, many of these sentiments can be considered to be statements of intent. According to Mr Durband, reality is that there will be a "mixed bag" of responses depending on personal preferences and circumstance. For him, travellers will be caught between two opposing forces: those who will push for more domestic travel while the other will continue to encourage international travel.

"As international borders were largely closed before some time, domestic tourism is currently enjoying a mini boom," says Mr Goh.
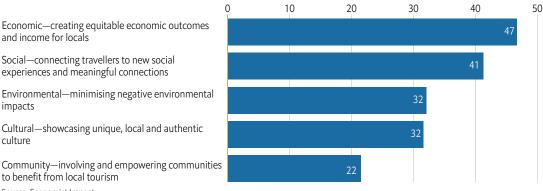
Expanding the meaning of sustainable travel

Sustainability is often linked to environmental or climate concerns, with a focus on issues like avoiding single-use plastics and reducing carbon footprint, but our survey finds that travellers in Asia-Pacific have a holistic approach to sustainable travel and are thinking deeply about their travel habits, behaviours and their implications beyond the environment alone.

When asked to pick the most important aspects of sustainable tourism, most travellers pick economic (46.7%) and social issues (41.3%). About a third say minimising environmental impacts of travel is among the two most important aspects of sustainable tourism for them, a still sizeable number. What stands out, however, is the diversity of views and perspectives when it comes to understanding what sustainability means to a traveller today.

Figure 8: Consciousness of different kinds
What are the most important aspects of sustainable tourism for you? Please select up to two.
(%)

Aspect	%
Economic—creating equitable economic outcomes and income for locals	47
Social—connecting travellers to new social experiences and meaningful connections	41
Environmental—minimising negative environmental impacts	32
Cultural—showcasing unique, local and authentic culture	32
Community—involving and empowering communities to benefit from local tourism	22

Source: Economist Impact.

When examined across different age groups, two distinct camps emerge: the first—comprising of generation Z (52.1%) and millennial (46.8%) travellers—says it most about the social aspect of tourism. Meanwhile, older generation X-ers (47.8%) and baby boomers (50.3%) are focused more on economic aspects of sustainability.

All travellers indicate at least some concern for environmental (32.1%) and cultural (31.6%) aspects, suggesting that travellers aren't thinking of sustainability as a single-issue topic but one that encompasses myriad aspects that interact with one another.

"Even before the pandemic, we saw a movement towards the idea of regenerative travel that includes the preservation of local culture, environmental conservation and social sustainability in relation to travel and tourism," says Ms Ortiguera.

While most travellers surveyed believe sustainability in tourism is important, our interviews with subject matter experts suggest there are differences based on generational or cultural lines. Ms Higgins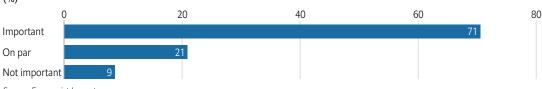-Desbiolles, for example, says: "The younger generation is actually probably more attuned to responsibility and sustainability, while the older generation and the baby boomers are a bit more focused on enjoying what they have."

Similarly, in Korea, 50.8% are strongly attuned to the importance of culture as an aspect of sustainable tourism. This makes sense considering the soft power the country has accrued thanks to the global popularity of local cultural exports like K-pop music, TV serials and films. According to Seul Ki Lee, director of LINC+ Project and associate professor at Sejong University, "Currently, tourism is not contributing enough to Korea's GDP, although it has great potential as an economic driver given the country's widely recognised and increasingly popular culture boom in the global market, often known as the K-Wave or Hallyu."

Meanwhile, Filipino (81.9%), Malaysian and Indian (76.1%) travellers say avoiding waste and choosing sustainable food options are important aspects of their approach to sustainable travel. Millennial travellers (74.7%) appear to be the group most concerned with making sustainable, less wasteful food choices, but there is an overwhelming consensus as to the importance of this topic.

Figure 9: How we eat is how we travel
Food choices that are environmentally sustainable and avoid waste
(%)

Important	71
On par	21
Not important	9

Source: Economist Impact.

This sentiment is especially important given food is inextricably linked to travel, and is considered the most prominent type of hospitality waste.[6] Food is also central to tourism: a 2016 World Food Travel Association study found that 54% of leisure travellers are food travellers, and many cite gastronomic experience as central to their desire to go abroad.[7]

As a result, we're witnessing the continued rise of "gastronomy tourism", an activity that links visitors with culinary experiences unique to a particular region or area. Gastronomy tourism doesn't just aim to expose visitors to new flavours and foods, but to open up local economies to a sustainable form of tourism that champions locally-grown produce, cultures and knowledge in a sustainable way.[8] This, in turn, has an important positive multiplier effect on the farming sector—particularly in agricultural regions.

Technology reshapes travel

Travel technology was already a burgeoning sector before the pandemic set in, primarily as a way for businesses to digitalise their operations and expand their reach to new demographic segments. From booking platforms to price aggregators, contactless payments, check-in and boarding, technology was making tourism more affordable and accessible to new travellers by cutting across informational silos and inconveniences.

"Technology gives travellers such fabulous information instantly. I think apps that support this trend, as good as many are now, will just become better and better, and better applications and hardware can transform tourism both from an experience perspective, as well as by helping disseminate information more easily," Mr Durband says.

According to Ms Ortiguera, by 2023 it was estimated that 69% of travel sales would happen online, leading to as much as US$1 trillion in online travel sale. Of course, all that has changed with the arrival of the pandemic, but digitalisation hasn't abated. In fact, it's increased considerably in the travel and tourism sector as businesses scramble to stay relevant, increase traveller confidence and recoup losses as they recover from the effects of travel restrictions.

Our survey indicates strong support for travel technologies among consumers. Almost nine in 10 (86.9%) respondents agree that emerging, innovative technologies enable sustainable tourism, a sentiment that was

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[6] https://www.hospitalitynet.org/news/4095679.html

[7] https://seasidewithemily.com/sustainable-food-tourism/

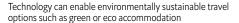[8] https://ecotourism-world.com/gastronomy-tourism-in-a-sustainable-way/

overwhelmingly positive across geographical and generational differences.

This isn't surprising. Technology is helping both tourists as well as operators make decisions and choices that support conscious travel choices. Mr Bhatnagar says that "technology allows us to easily explore, plan, and realise sustainable tours. It helps travellers connect directly with local operators and guides through aggregator platforms and even social media channels. While all small entrepreneurs in sustainable travel may not have a marketing team, they certainly have access to social media channels to spread the word."

There are a number of ways in which innovative technologies support sustainable tourism, but most of our respondents point to how technology expands access to green or eco accommodations (44.7%).

Figure 10: Technology provides more options for the conscious traveller
How can innovative technologies support sustainable tourism? Please select up to three.
(%)

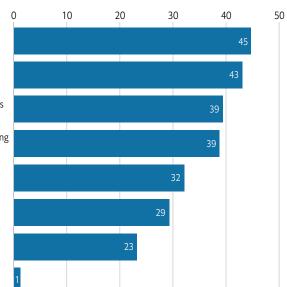|	
Technology can enable environmentally sustainable travel options such as green or eco accommodation	45
Technology-driven solutions can make the tourism industry more inclusive, by enabling a wider range of local stakeholders to benefit economically	43
Technology can enable environmentally-friendly transport solutions that help reduce the carbon footprint	39
Technology solutions can ease health-related concerns by supporting safe distancing and contact tracing, sanitation controls, etc.	39
Technology powers the sharing economy, which contributes to more sustainable outcomes	32
Technology makes it easier to visit areas off the beaten path, providing an opportunity to connect with local cultures	29
Technology can help manage consumption and limit waste (e.g., tools such as smart energy trackers, food waste prevention tools, those for water management)	23
Don't know	1

Source: Economist Impact.

Accelerating sustainable innovation

Some say that technology is also helpful in making sustainable tourism more inclusive by enabling more local stakeholders to benefit economically (43.1%).

In our interviews, we heard a range of examples and ways in which technology is already transforming the travel industry. Emerging technologies can help tour operators in manage food waste and reduce resource-intensive activities.

Some companies are experimenting with new, emerging technologies to circumvent travel restrictions and health risks, inadvertently changing the way we experience travel. Virtual reality tours are an increasingly common example, that allow travellers new experiences from the comfort of their homes.

For Ms Higgins-Desbiolles, virtual tourism has the potential to "keep people in lockdown feeling connected and engaged with the world. If you can monetise that, you help tour guides and communities in the crisis situation."

Expanding access through technology

Technology has immense potential to expand access for everyone. Ms Higgins-Desbiolles sees technology as a lifeline for disabled people by making information about disability-friendly facilities more readily accessible or creating opportunities for visitors to experience a place through mixed reality.

In our survey, almost a third of respondents view technology as way to reach areas off-the-beaten-path and connect with the less-obvious aspects of local culture. For example, visitors can easily experience the traditional architecture of the ancient Potala Palace in Lhasa through livestreaming platforms.

Mr Durband says smartphones have exerted a major and lasting impact on the world of travel and tourism that we are still seeing ripples of. He suggests that smartphones can play a role in pushing sustainable travel by increasing

travellers' awareness through periodic reminders or alerts.

"So much of sustainability problems is because of a lack of awareness in the traveller," he says.
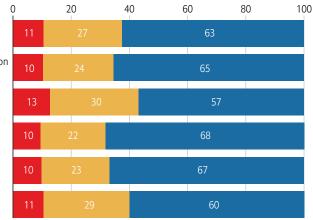
Across the board, travellers display a lot of optimism and preference for travel that blends the use of emerging technology, regardless of age. That being said, technology's uses are perceived differently depending on each age group. Most generation Z and millennial travellers see technology as an enabler and expander of economic benefit for local stakeholders, while baby boomers and generation X view digital primarily as a tool to access green or eco accommodations.

The importance of technology as a support for travellers making sustainable choices and decisions cannot be overemphasised. Nearly seven out of 10 (68.2%) agree that technology makes travel planning much easier, while more than half (56.7%) believe that technology makes them more aware of their carbon footprint when they travel. Meanwhile, another two-thirds believe that technology helps them learn about sustainable travel options and choices.

Figure 11: Technology supports conscious travel choices
To what extent can technology help you make sustainable choices/decisions when you travel?
Select one in each row.
(%)

Source: Economist Impact.

And from an operator perspective, already there are several examples of businesses that are leveraging technology to positively impact local communities and residents of popular travel destinations. Ms Banerjee cites the example of companies that provide homestays that use different innovations that are green and energy-efficient. "These all create livelihoods for local entrepreneurs in remote, rural areas," she says.

The future of travel

The past two years have been particularly challenging for the tourism and travel industry, and it is unclear how swiftly things will change. Although technology has been an invaluable help in these trying times, it's clear that more substantial transformation is necessary.

Growing awareness around issues like climate change, overtourism and community pressure will continue to push the industry to make significant changes to business as usual.

Moving forward, the industry has a massive opportunity to reimagine, wholesale, what travel could be like. For one, travellers are supportive of efforts to promote more sustainable travel practises and—more importantly—they're willing to let their money speak for them. More than half (54.5%) say they are willing to pay a premium for sustainable travel options, to varying degrees, while 57.2% say they would actually avoid destinations or activities that would negatively impact the environment and community.

This tells us two things: one, that businesses have an opportunity to create new revenue streams by innovating different ways to experience travel. For example, robust video conferencing technology could enable workers to connect with their jobs remotely and open up the possibilities for "workcations" in international locales, an option with strong support from almost 50% of our survey respondents. Mr Lee sees this as a way to push tourists to behave more like residents who care about the neighbourhood and destination they are visiting.

Second, businesses that are serious about sustainable tourism can positively influence their brands. Given the high demand for conscious travel options, Mr Goh's suggestion that businesses can win more customers with "stronger sustainability credentials and credibility" rings true.

Government leads the sustainable revolution

Similarly, governments that are willing to focus and invest in sustainable tourism infrastructure will gradually reap the monetary rewards brought about by consumers voting with their wallets.

Experts we spoke to also caution that sustainable travel could be limited by the lack of robust sustainable tourism infrastructure despite the best intentions of other stakeholders such as travellers and businesses, underscoring the importance of government will and action.

After all, tourists can only make the decision to go sustainable if they have enough choices put before them. Conscious travel is dependent on the availability of encouraging policies, facilities and incentives such as eco-friendly public transport, accommodation and experiences.

Mr Lee at Sejong University points to the hurdle of necessary investment and planning that has to be done by not just tourism businesses but other stakeholders like local authorities, agricultural and food industries, and so on.

There are some indications that governments in Asia-Pacific are taking on key roles to promote sustainable travel. For example, the Mekong Innovations in Sustainable Tourism (MIST) board has been investing in startups solving tourism problems like single-use plastics. In the Philippines, the national tourism board has been actively pushing "farm tourism" as a way to boost the lagging agricultural industry and cut down on overtourism.[9]

A road paved with good intentions

Through conversations the results from our survey, we can clearly see that travellers want to be more conscious about how, when and where they travel – but desire alone is not enough to make a strong impact. Governments, private business, travel operators and individuals all have to make a strong, collaborative effort to make the case for sustainable tourism's continued relevance.

"If the infrastructure, businesses and governments don't facilitate [sustainable tourism], it doesn't really matter how much you demand," Ms Dodds says. She cites the example of tourists having no choice but to buy plastic water bottles in some countries where one cannot buy filtered water, "because it is a health issue".

There remains some scepticism about the ability of the industry-at-large and individual travellers to make substantial, lasting change despite our survey overwhelmingly suggesting otherwise. Mr Durband, for instance, doesn't think that the current, more conscious way of travelling wrought by the pandemic is likely to stick, despite growing awareness around sustainable tourism. "I think whatever place was overcrowded before will become overcrowded again because they're iconic, they're well known," he says. "They need to be better managed moving forward."

On the other hand, a few other experts believe the conscious traveller is here and is providing a foundation needed to reimagine travel for the future. "Do we really want to go back to the way we were in 2019? I actually don't think so in all cases," says Ms Dodds. "This is an amazing opportunity to refocus and rethink our development."

"Ultimately, sustainability's not only about us," Ms Higgins-Desbiolles says – it's about thinking forward so that all of the generations to come get to enjoy things.

Our research shows there is no shortage of desire for change, and good intention, among travellers—what is needed now is a mutual commitment to make a better future a reality. "Good intentions can be optimised, if we play our cards right," Ms Banerjee says. The great tourism pause, and the growing focus on conscious tourism among travellers, makes this an opportune moment for change.

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[9] https://www.tripsavvy.com/sustainable-travel-trends-in-southeast-asia-5115393

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