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Editorial collaborators

Hassell



Travel Futures

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Intro

Welcome to *Travel Futures*, a critique of the most progressive airports, operators and tech innovations that are boldly emerging from the pandemic-induced travel turbulence. In these times, the travel industry could be forgiven for taking a step back. While there's still some inertia the industry, most operators have responded proactively to the existential challenge – determined to innovate between the false starts.

In this report we explore trends in supportive travel, where technology is meeting new desires for safety, care and efficiency. Part of this is a new wave of flexible hosting models providing attentive service, be it human, virtual, or robotic. Inclusive experiences are also key to this trend, with airport experiences becoming more compassionate to travellers with various needs.

We also review the changing propositions in areas of regional travel and bleisure pursuits. The rapid evolution is a by-product of the rise of remote working, which allows more people to dictate how they curate their work, leisure and family lives. This trend is evident through incentivised relocation packages, a revival of nostalgic local accommodation, and accessible formats of adventure, to name a few.

Finally, and central to the above, travellers are becoming more intentional about how and why they travel. Ultimately, this is rooted in a desire for meaningful connections – be it in the form of slow-travel trips with loved ones, bucket-list educational immersions or getting knee-deep to make a tangible difference to an immediate community.



Supportive Set-ups

New systems are coming to the fore that provide heightened levels of safety, reassurance and inclusivity.

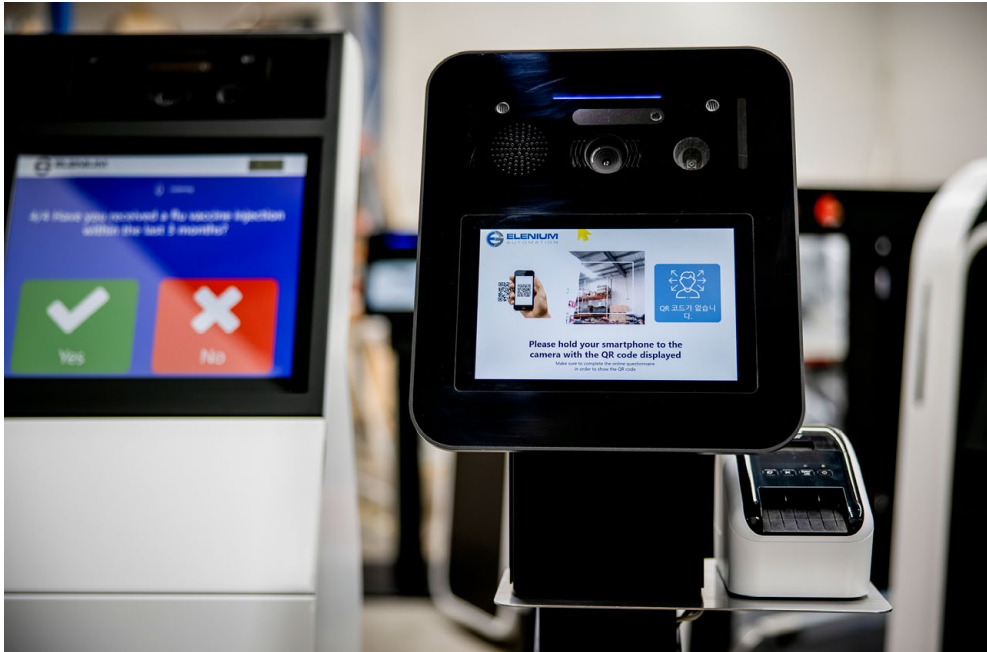
01 Introduction

As borders open around the world, people are satisfying their desire to travel once again. But the environment they encounter in airports, stations and hotels will be vastly different to their pre-pandemic recollections. Instead, people will find spaces that are considerably safer, more efficient, and intuitively supportive. Whether it's a travel service, technology or an experience, a greater emphasis is being placed on passenger reassurance, assistance, and inclusivity across the sector. This is a time to cherish each valued traveller, and the industry has responded to this shift. Demonstrating this is a seemingly overnight growth in biometric and contactless technology.

According to the [Capgemini Research Institute](#), 62 per cent of consumers are expecting to increase their use of touchless technologies once the pandemic subsides. Further supporting the rise of contactless technologies are service and hosting models.



These innovations are increasingly experimental, utilising combinations of robotics, AI and virtual assistants to find the perfect 'human' experience. Finally, travel spaces are also being designed with a broader range of user groups in mind. Catering to travellers with hidden disabilities and mental health difficulties, these spaces are better able to provide for the needs of the individual.



Above: Elenium
Automation

Below: SkyLane,
Los Angeles



Reassuring Tech

Biometrics and contactless technologies are transforming the travel experience, offering customers the reassurance of hygienic processes whilst reducing crowding and queueing. These are key priorities as the sector rebuilds. While the technologies are not new, their uptake is increasing due to travel safety imperatives and consumer preferences. Demonstrating the potential growth of the opportunity, research by Valour Consultancy predicts more than a three-fold increase of biometrically enabled passenger touchpoints within airports over the next decade. Given this, airports and airlines are responding in several ways across the whole customer journey.

In Australia, new security screening processes are being tested to deliver a self-service experience. A partnership between technology firm Elenium Automation and X-ray company Micro-X is leading to the development of a series of voice-controlled booths. These are similar in process to an automated passport control gate or grocery check-out, and ensure

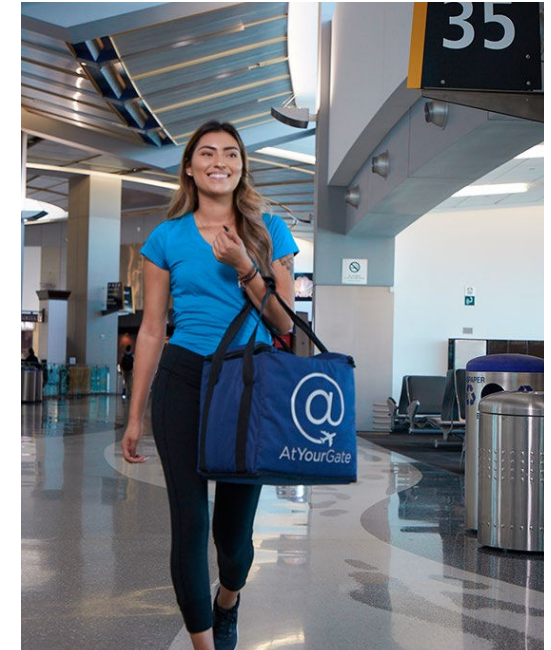
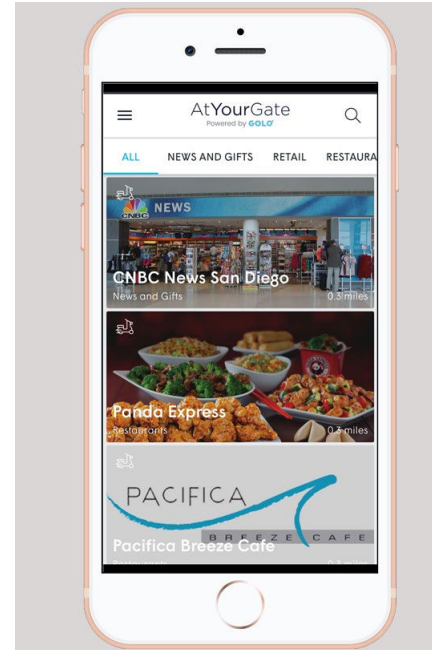
passengers are never separated from their baggage. In taking control over their own security, passengers are bestowed with a new level of autonomy in the airport experience – whilst having the assurance of reduced in-person contact.

Facial recognition technology is also expanding beyond border security checkpoints, into check-in, bag drop and boarding touchpoints across the world. For instance, Los Angeles World Airports is one of many to recently install SkyLane, an automatic facial recognition boarding gate. The technology expedites the boarding process – allowing customers to breeze aboard without the need to scan a passport or phone. Delta Airlines have also been using similar technology in airports in Detroit and Atlanta. Airlines also have plans to streamline the boarding process, with Air Asia integrating biometric scanning into its app to support the check-in process. While these platforms generally do not store personal data, some passengers are still hesitant about data protection and elect to opt out.

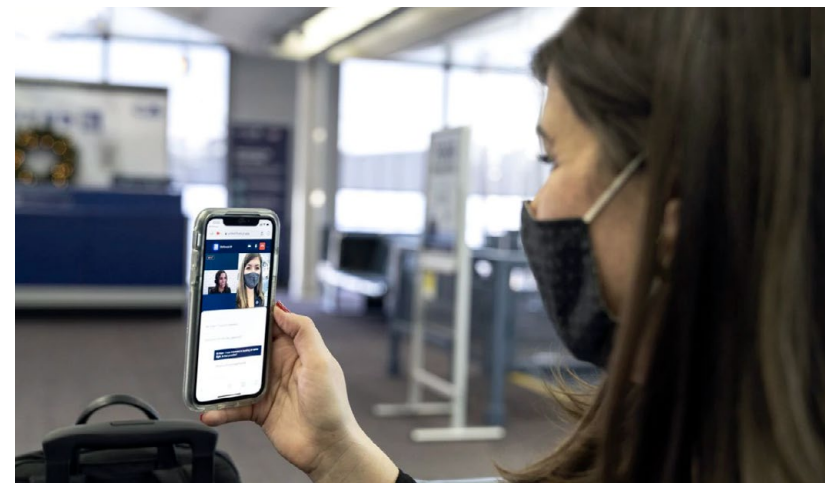


Contactless technology is also expanding into airport retail propositions to offer a more hygienic and efficient experience. For instance, travel convenience store Hudson, has recently launched 'Hudson Nonstop', a check-out-free proposition. Deployed in airports across the United States, the store integrates Amazon's 'Just Walk Out' technology. This allows customers to scan their card or app upon entry, collect their items and walk out. While these formats have been growing in non-airport locations for several years, it is a well-overdue addition to the airport experience. This is particularly true for nervous travellers anxious to get to the gate or for those seeking to dedicate more time to exciting parts of the airport experience.

Beyond the gains in efficiencies, biometric and contactless technologies also save a significant amount of floor area. In the short term, this supports physical distancing requirements, delivering peace of mind to passengers. In the long term, it allows airports to experiment with bold experiences beyond retail, and further become compelling standalone destinations.



Above:
AtYourGate



Below:
Agent on
Demand,
United
Airlines



Contactless Technology –
Proxyclick Flow

Flexible Hosts

As automation increases to make our travel hubs more efficient, personalised services emerge, offering specialised and tailored assistance. This is not the big 'i' information desk we traditionally turned to in airports or train stations, or the concierge we sought out in hotels. Rather, service is emerging in an array of formats from on-the-spot remote help to supportive face-to-face hosts – be they virtual or human.

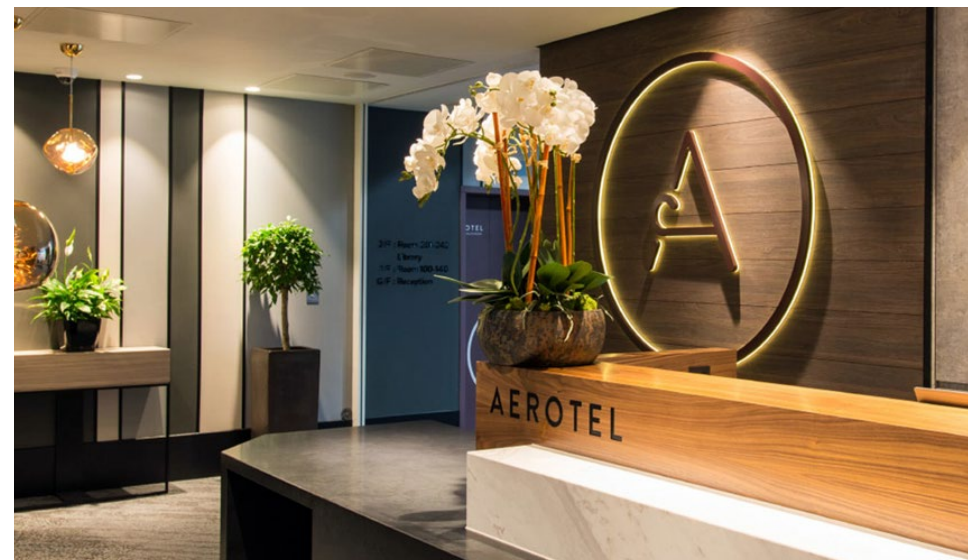
One such example is United Airlines' 'Agent on Demand' service which has been deployed at airports in Chicago and Houston. From anywhere in the airport, passengers can scan a QR code and connect to a virtual assistant via chat, phone or video call. A built-in translation feature enables support in over 100 languages to resolve queries, such as seat assignments, upgrades and rebooking. In this instance we are seeing a decentralisation of service, with access to help no longer limited to a physical location. Like the innovation in biometrics, this prevents overcrowding and, longer term, it has the potential to free up space in the terminal for more engaging propositions.

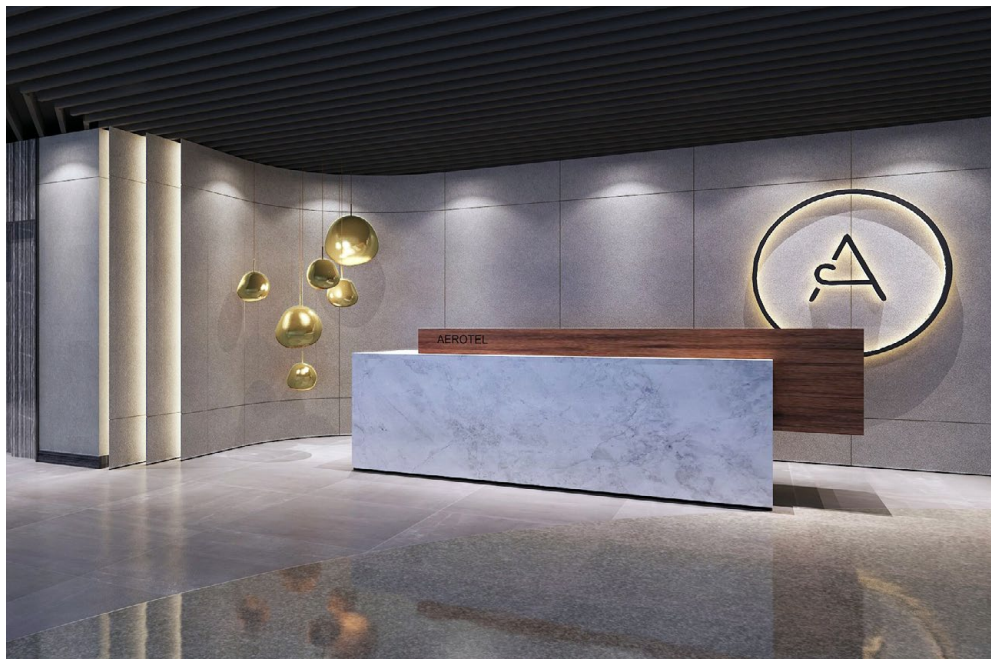
Decentralisation of service is also occurring through the growing market of robot helpers. A survey carried out by Air Transport IT Insights recently identified that 32 per cent of airports and nearly half of global airlines are looking for partners to further develop their robotic capability in the next three years. Getting on board with the opportunity is Philadelphia International Airport and their resident robot, Gita. Developed by technology start-up AtYourGate, Gita delivers food orders to passengers waiting at their gate from 19 of the airport's retailers. This enables passengers to skip the queues and experience the airport on their terms.

Lounge and hotel operators are also experimenting with new models of service and hosting to support more varied customer needs. For instance, Sydney Airport has recently launched Aerotel by Plaza Premium Group, an in-airport hotel and lounge. Being highly flexible, it offers stays for as little as three hours for a reasonable AUD\$55 (USD\$39), allowing passengers a place to replenish between longer connections. Also on offer is a pay-per-use lounge which welcomes non-hotel

guests to enjoy comfortable surrounds, unlimited food, showers and luggage storage for AUD\$35 (USD\$25). This is an accessible and well-overdue model for customers requiring tailored amenity. It also bridges the gap between expensive exclusive lounges and the wider airport offer, and ultimately sees airports becoming more nuanced in how they cater to different audience groups.

Aerotel, London (Heathrow)





Aerotel, various locations

Conscious Care

In recent years, wellbeing, mental health, and social inequity have become both a greater talking point and a catalyst for change through community movements both online and on the streets. The tourism industry has taken notice too by making a conscious effort to deliver spaces and services attuned to those with visible and hidden disabilities, mobility requirements, and mental health issues.

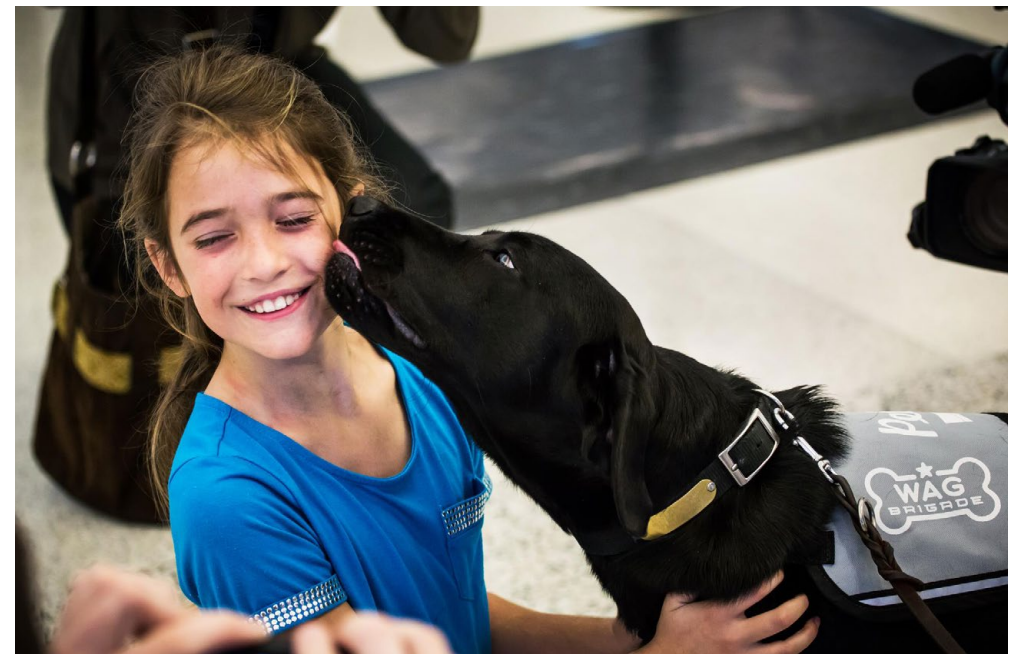
An empathetic approach is being taken by Kuala Lumpur Airport in Malaysia, embarking on ways to support persons with sensory needs and hidden disabilities, such as autism and ADHD. A recent program named 'The Butterfly's Adventure' offers mock airport journey experiences, which help travellers and their families acclimatise to the airport's environment and processes. These tours include practice scenarios which cover key touchpoints from check-in and security to boarding, allowing people to build familiarity and confidence for an upcoming trip. The tours are part of a wider initiative which also delivers a calm room, sensory walls and priority access lanes at major touchpoints.

With similar intentions but a very different approach, Quebec City's international airport piloted a pet therapy program to relieve the stress of anxious travellers. Research has shown that the presence of a dog, even for just a few minutes, can divert attention and calm worries, helping nervous flyers to regulate their breathing and any other stress responses.

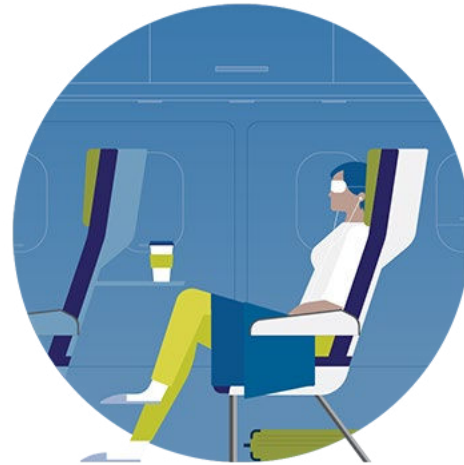
Across the country in Vancouver, the airport and Canadian Mental Health Association collaborated on the Fly Calm initiative. This is an online resource designed to help nervous flyers and their children to 'calm their minds' before and during their journey. Pre-flight resources include games for children, as well as breathing and mindfulness techniques. In the terminal, travellers can also access free colouring books (as a form of mindfulness) or spend time in designated quiet zones.



Above: The Butterfly Effect – Calm Room, Kuala Lumpur International Airport



Below: Pet Therapy, Québec City Jean Lesage International Airport



As time goes on, the prevalence of these initiatives is set to increase as advocacy and awareness grow, alongside the publication of demand data. In the United States, research by Transportation Security Administration has reported a 56 per cent increase in the number of requests for assistance for passengers with autism as of mid 2019.

Further to this, in speaking to *Condé Nast Traveller*, Andrew Rosen, a clinical psychologist and the founder of the Centre for Treatment of Anxiety and Mood Disorders, related that nearly 25 per cent of the American population are specifically anxious about travel. With data points such as this, we can expect that airports will keep taking heed to provide caring and empathetic experiences.



*Fly Calm,
Vancouver
International
Airport*



Insights and Implications

- On-demand and self-service technology are now a significant and almost omnipresent part of the travel experience. The autonomy exercised by passengers over rudimentary tasks is likely to translate to expectations for control over more experiential amenities and tailored services. As such, it's an opportune time for airports to proactively understand their audiences and take advantage of the additional space and time freed up by increased automation.
- Creating a future where inclusive experiences and services are baseline and 'business as usual' should be a goal that all players in the travel sector are working towards. Not only does it make economic sense to widen the market, but the case studies discussed show that initiatives can be rolled out in various ways. Allowing varying scales of investment, there's almost no excuse for operators not to deliver on this aspect.



*Kids' Care
Station,
Munich
International
Airport*



Regional Revivals

The rise in localised travel is being met with a reinvention of accommodation and accessible ways to experience the wilderness.

02 Introduction

The pandemic's international border closures have reacquainted people with travelling locally and enjoying the outdoors. The convenience, affordability, and new-found memories enjoyed in domestic adventures are set to be a long-term behavioural shift. This is evidenced by Expedia Group's Traveller Value Index, with 60 per cent of global respondents saying they would be opting for domestic travel in the short term, and 41 per cent also desiring more frequent and shorter trips. Further to this, findings from accommodation booking site Booking.com noted that 56 per cent of surveyed travellers anticipate to seek out more rural, off-the-beaten-track experiences to immerse themselves in the outdoors. This growing demand is being met by a number of novel providers – from those reinventing retro on-the-road accommodation to others providing boutique wilderness experiences. This trend also leads to the prevalence of slower forms of mobility, such as travel via rail and airship.



*Mysa Motel,
Gold Coast (Australia)*



Club Jupiter,
Margate



Elevated Spaces

Localised travel has seen a reinvention of otherwise humble forms of accommodation into more desirable propositions. Specifically, caravans, trailer parks and motels have been undergoing a revamp, to deliver on-trend design and experiences akin to boutique hotels. Exacerbated by the pandemic, this is a response to consumer desires for a sense of adventure and one-off experiences that are still relatively accessible and affordable.

A glamorous yet affordable space is Club Jupiter, a refurbished caravan in the British coastal town of Margate. According to a statement by its founders, the caravan was developed as a direct result of the global pandemic, looming Brexit travel restrictions, and is also a proposition to take people back to easier times. In an interview with Brickfields Consulting, co-founder Emma Jane Palin related that 'it was really important that Club Jupiter remained affordable for people' and aims to appeal to a younger generation of travellers that are seeking 'achievable' forms of adventure. This is made

possible by offering self-contained cooking facilities, free parking, as well as sleeping six people to share costs. In the United States, holiday and trailer parks are also undergoing a revival to offer one-of-kind and novel experiences. One example is Waypoint Ventura, a vintage trailer 'hotel' in the form of a campground. The site rents 20 refurbished trailers which offer luxury comforts, such as Frette linens, quality appliances and individual outdoor decks. It is noteworthy that the park-come-hotel also serves RV and campervan travellers, allowing them to swap their own vehicle for an elevated overnight stay as part of a wider journey. This, combined with onsite facilities for vehicle servicing, is a savvy way to support the booming market of motorhome enthusiasts.

Beyond campervans and holiday parks, motels are also experiencing a resurgence to support the growth in road trip travel. The best propositions are those which celebrate nostalgic design with boutique amenities and sustainability credentials. An excellent example is the refurbished Mysa Motel on the Gold Coast (Australia). The space has maintained a retro architectural character, whilst being overlaid with modern amenities in line with boutique traveller expectations. For instance, check-in is self-service, and rooms come with free Wi-Fi and smart TVs with streaming services. The owners have also made a concerted effort to embed sustainability into the motel, with rooftop solar panels to power the space and rain tanks to support the toilets and gardens. Similarly, for Club Jupiter many of the fit-out's finishes were also sourced second-hand. Again, these product choices, whilst embodying the founders' values, also serve to appeal to consumer preferences that value sustainability and support local businesses.

If you look past the eye-catching décor, these case studies are also socially ethical accommodation options. Unlike holiday home and rental platforms, motels and caravan spaces add to the local economy by providing employment. Importantly, they also add – rather than remove – property from the rental market, which re-balances the rental shortages faced by most holiday hotspots.



*Club Jupiter,
Margate*



Club Jupiter,
Margate



“The whole premise of Club Jupiter came about from wanting to do something fun to a real space, but not wanting to take an actual home away from someone. In Margate there is a real issue with the amount of properties being used for Airbnbs so we didn’t want to contribute to the lack of housing.”

Emma Jane Palin, Co-founder, Club Jupiter



*Mysa Motel,
Gold Coast (Australia)*



Wilderness Escapes

The boost in regional travel is connected with an increased desire to experience nature and the outdoors. This view is supported by findings from accommodation booking site Booking.com, which has seen endorsements for nature-based experiences increasing since the start of the pandemic. Current figures for 'hiking' are at a high 94 per cent endorsement, followed by 'clean air' (50%), and 'nature' (44%). As a result of this increased value on outdoor experiences, a number of operators are facilitating new offers to satisfy this need at both the luxury and affordable ends of the market.

At the affordable end of the market, there are several platforms which connect travellers to camp sites and accommodation on public and private property. The key platforms dominating the market are [Hipcamp](#) and [Tentrr](#). While these platforms are not new, they have experienced growth since the onset of the pandemic as consumers continue to seek the outdoors and secluded locations. Hipcamp, in particular, has been valued at USD\$300 million,

clearly showing the perceived value of this market. The key to their success is their ability to make camping accessible and convenient – particularly for novice campers. Stays can start for as little as USD\$19 per night, and sites can provide a place to park one's RV and pitch a tent – all the way up to boutique tents and treehouses. This broad appeal allows new consumers into the market and signals the burgeoning of this niche.

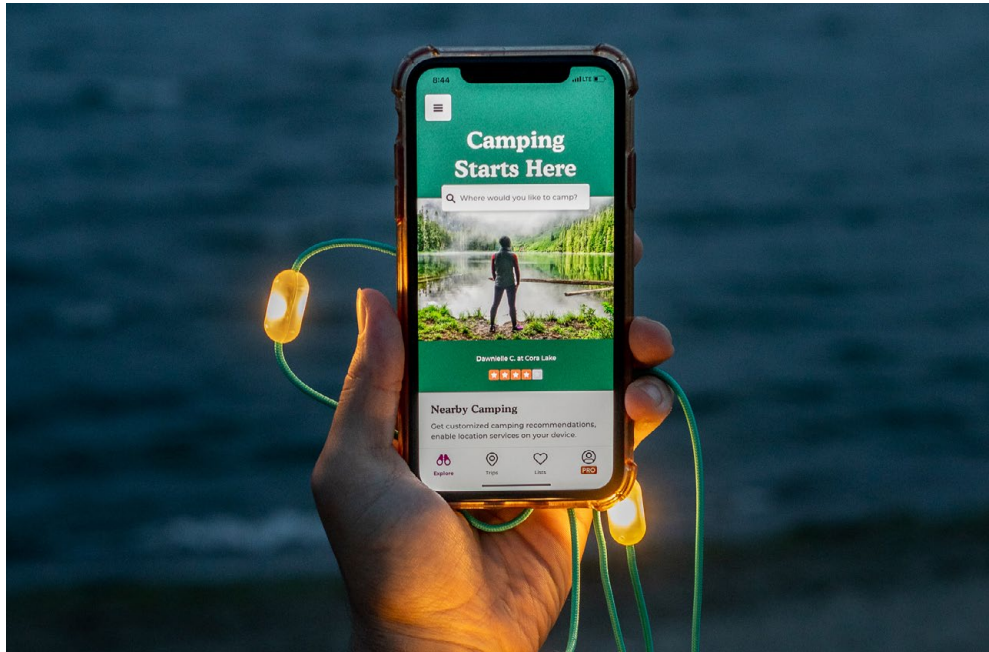


Tentrr, various locations

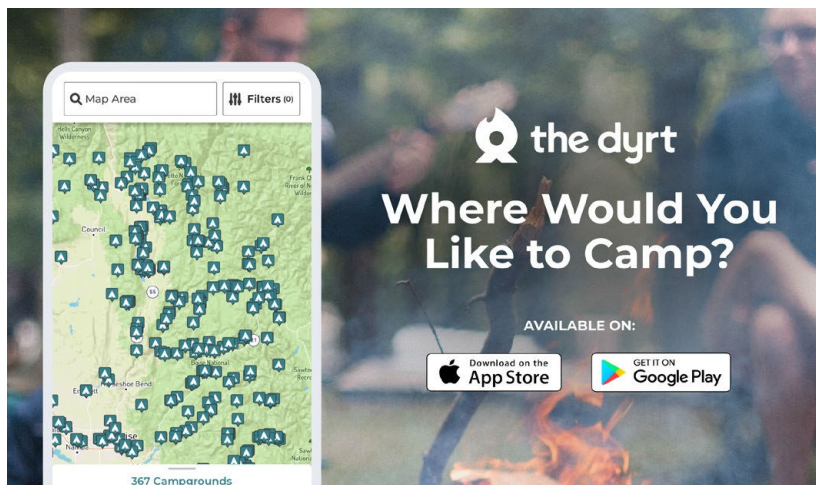


Right: Tentrr, various locations

Left: Club Jupiter, Margate



The Dyr, Application



A similar platform also experiencing growth is The Dyr, which at the time of writing is the top camping app on the Apple and Google Play App Stores. It successfully answers multiple needs by offering a subscription-based model to the growing market of outdoor adventurers. For USD\$36 per year, the 'The Dyr PRO' subscription offers access to offline maps showing free camping sites, a road trip planner, as well as air quality reports and fire warnings. This model also allows The Dyr to offer commission-free bookings to campground owners, thus leaving them with more capital to reinvest into their sites.

As the appeal for outdoor adventures widens, luxury tour operators are also entering the market to offer one-of-kind experiences. One such example is the partnership between Collective Retreats, a high-end outdoor accommodation provider, and Outdoorsy, an RV rental service. The partnership offers road trip itineraries which leverage the use of an RV to arrive at a luxury Collective Retreat site in New York City, the Texas Hill Country, or Vail. Appealing to trending market tastes, guests are treated to Collective Retreats' signature programming in farm to table dining at open-air restaurants, live music, and health and wellness programs. Seeing the opportunity for this market, the companies plan to expand with new sites and continue delivering such experiences.

Slow-mo(bility)

In support of localised and short-haul trips, other forms of mobility are coming to the fore. These transportation modes present an alternative to air travel on routes which have traditionally only provided one perceived option. This is underpinned by rising preferences for sustainable modes of transport, as well as consumer desires for 'slow travel', i.e., the practice of visiting fewer places and journeying at a gentler pace. Brickfields Consulting reported on these factors in the 2020 Reawakened Spaces report, and the preferences are set to continue, particularly in the rail travel sector.

According to a survey by tour operator Audley Travel, 81 per cent of travellers said they were likely to consider rail travel for their next trip. Further to this, Amtrak Vacations, another operator that bundles hotels, excursions and rail travel, experienced a 47 per cent increase in bookings during 2021 compared to 2019. In response to such growth, several operators are expanding their rail-only offerings. One such example is UK-based company Original Travel, which has launched

the 'Travel Less, Travel Better' tour collection, with detailed tours around Scandinavia and Eastern Europe. The premise of the collection leverages trends in responsible travel, sabbatical itineraries and philanthropic pursuits.

Another emerging form of slower mobility is commercialised airships, commonly known as blimps. The key imperative behind their emergence is to provide a sustainable alternative to aeroplane travel for short-haul trips. In the UK market is Hybrid Air Vehicles (HAVs) who possess an Airlander 10 airship. The craft can carry 100 passengers and HAVs has proposed several routes averaging between four and six hours – the equivalent of a flight, including travelling to and from the airport. Key routes include Barcelona to Palma de Mallorca, Liverpool to Belfast, and Seattle to Vancouver. Even tour operators are seeing the opportunity, with Swedish travel firm OceanSky signing a deal to use the airships for luxury experiential travel over the North Pole. Here we are seeing a convergence of the novel, experiential and sustainable.



*Hybrid Air Vehicles,
various locations*





Left: Future Rail Concept,
PriestmanGoode

Right: Fast Rail Concept,
Hitachi Rail

Viewing the shifts in rail and airship through a wider lens, it is important to note their prevalence is also occurring against the backdrop of political and environmental campaigns. Some of these include the 2021 European Year of Rail, an effort by the European Commission to reach climate neutrality by 2050. Further to this, French laws have also banned domestic flights of less than 2.5 hours where rail routes exist. Similarly, the 'Campaign for Better Transport' in the UK, is also seeking to ban flights that can be replaced by rail travel of five hours.

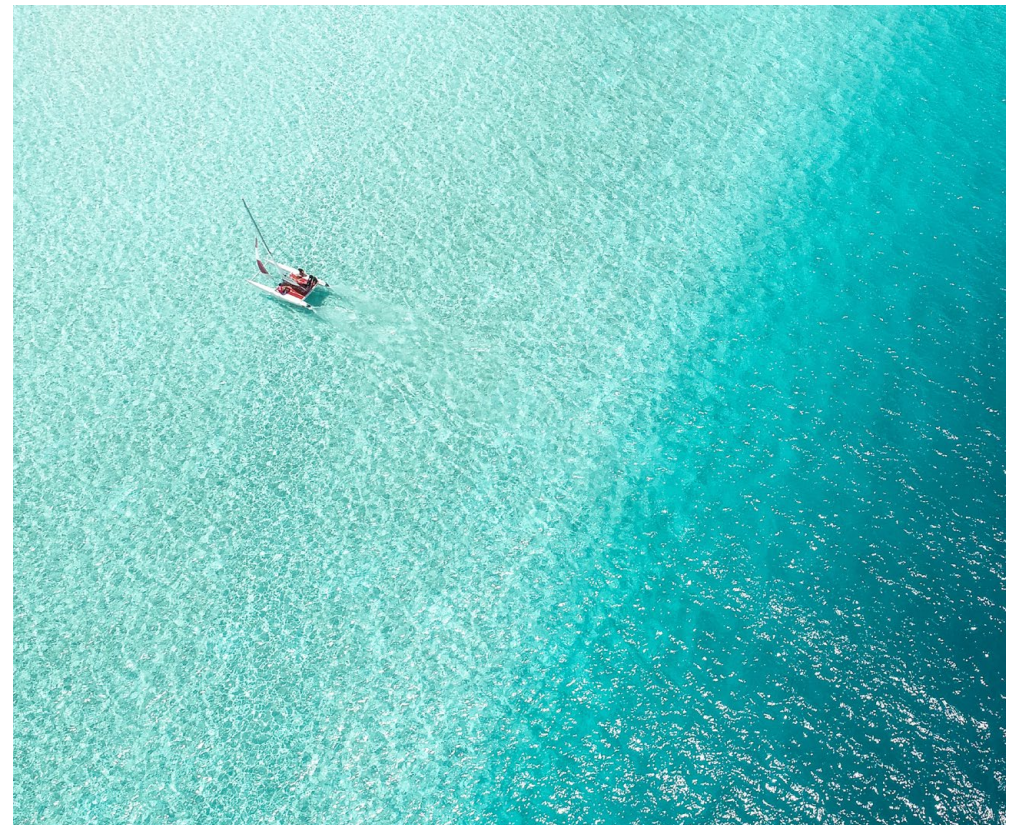
While airplane travel is expected to return to pre-pandemic levels, it's clear that the awareness and momentum for shorter, slower, and more sustainable forms of travel will only increase.





Insights and Implications

- Independent accommodation operators are consciously considering the ethical and sustainable aspects of how they develop their business models. They are scrutinising how their proposition impacts environmental and current housing market challenges and modifying their proposition in response. Such an approach should be a wake-up call to bigger players to follow suit, as they hold the potential to unlock a greater scale of positive change.
- Shorter, slower, and more sustainable forms of travel are set to increase in line with consumer preferences. However, the pace of this change will depend on governments' ability to embrace new models and campaigns. Where they are slow moving, we can expect the private sector to keep innovating to create new forms of sustainable travel.



The background is a composition of geometric shapes and colors. On the left, a vertical yellow bar contains the text. The rest of the background is divided into four quadrants by a central cross. The top-left quadrant is brown, top-right is yellow, bottom-left is grey, and bottom-right is yellow. Large white circles are positioned in each quadrant, overlapping the central cross and the edges of the quadrants.

03

Bleisure Benefits

The blending of work, play and learning has entered the mainstream and is bestowing benefits to family life, local economies and the arts.

03 Introduction



Ovolo Hotel, Sydney (HASSELL)

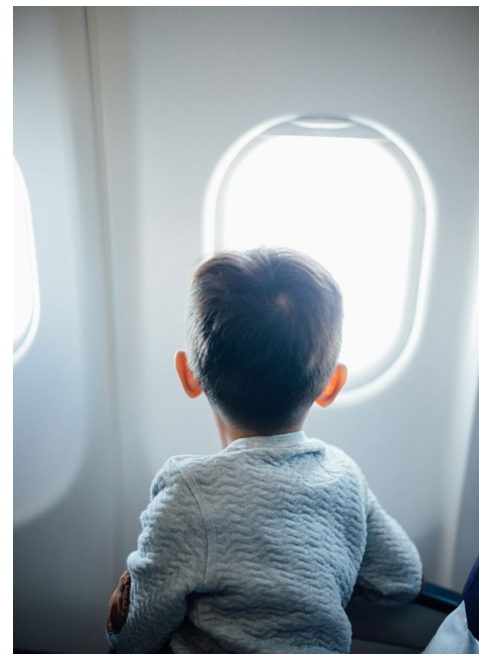
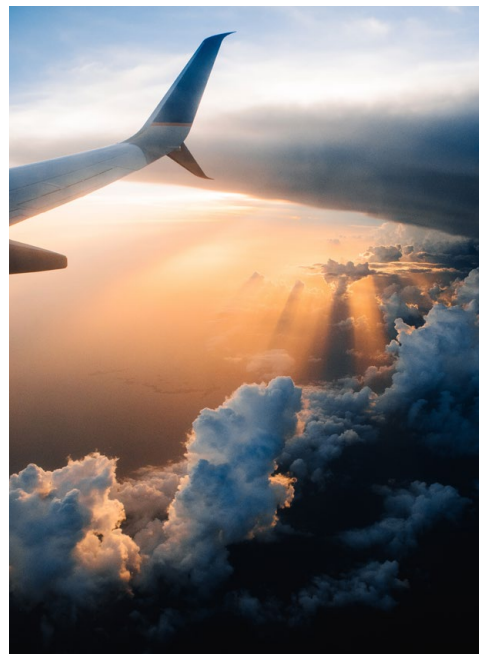
Long before the pandemic, boundaries between work and play were blurring. However, the mass adoption of remote working has facilitated new possibilities by untethering workers from their desks. This cultural shift has only accelerated, with wider demographics now combining work, play, homeschooling, and travel. It's fair to say that business and leisure are now so intertwined that 'bleisure' travel has entered the mainstream. Research supports this too. Based on findings from more than 28,000 travellers globally as well as their own proprietary data, Booking.com discovered that 37 per cent of travellers have already considered booking somewhere to stay in order to work from a different destination, while 52 per cent would take the opportunity to extend any business trips to enjoy leisure time at the destination. This growing preference is manifesting in a number of ways – bestowing many benefits to the traveller, from hotel operators stepping in to provide a breadth of work-play-learn packages to cities incentivising the relocation of entrepreneurs. Airports are also weighing in on the leisure component, delivering exceptional experiences that benefit their own brand profile as well as local communities.

Corporate Directions

Corporate business travel is undergoing a reinvention. For some individuals this means flying less altogether; for others it means extended stays, whether it's with the family in tow, or for solo pursuits. This is a result of emerging preferences for a slower work-life pace – and where families are concerned, a heightened value placed on time for shared moments. Recognising these needs, hospitality and conference operators are iterating their models to create deeper and more meaningful experiences.

A particular example was the Square real estate conference in Ibiza, Spain, in which the organisers encouraged the speakers to bring their families, involve them in activities and stay a few extra days. Reflecting on the event in a blog post, speaker and consumer trends specialist Henry Coutinho-Mason related that the hybrid format resulted in creating deeper connections. Shared meals and playful moments with fellow speakers, their partners and children made this possible – by literally bringing their 'whole selves' and loved ones to work.

Such formats open the potential to expand event attendance to new demographics, thus reducing typical limitations to business travel that formerly involved juggling family life.



Right: Lyf by Ascott,
Singapore

Bottom Left:
Wojo, Lyon



Hotel operators are also an integral part of this trend, adapting their spaces and services to support the new interplay between work, play, learning and family life. For instance, Marriott Hotels now offers a 'Work Play Pass' to appeal to corporate guests with accompanying families. The package includes office and study spaces, a business concierge service and supervised kids' activities at their high-end resorts. Hyatt, Four Seasons and Hilton have also released similar offers. This blending of ordinary life in a holiday destination allows the elusive sense of balance to be somewhat achievable in a post-COVID world.

Another factor influencing changes to corporate travel has been the increase in people migrating to regional areas. For this group, travel now comes in the form of a longer commute into the office paired with a mid-week city stay. Building on their experience with co-working brand Wojo, Accor have responded to this need, by launching 'Commute and Stay'. The offer gives workers a central base in a city hotel, enabling two days in the office and a venue for evening entertainment with clients, colleagues and friends. Rates are also incentivised, with 15 per cent off and a flexible cancellation fee. In time it's likely that more boutique operators will offer similar propositions, perhaps in partnership with similarly aligned co-working operators. This would be to appeal to younger audiences that have also traded the city for more affordable areas.



New Nomads

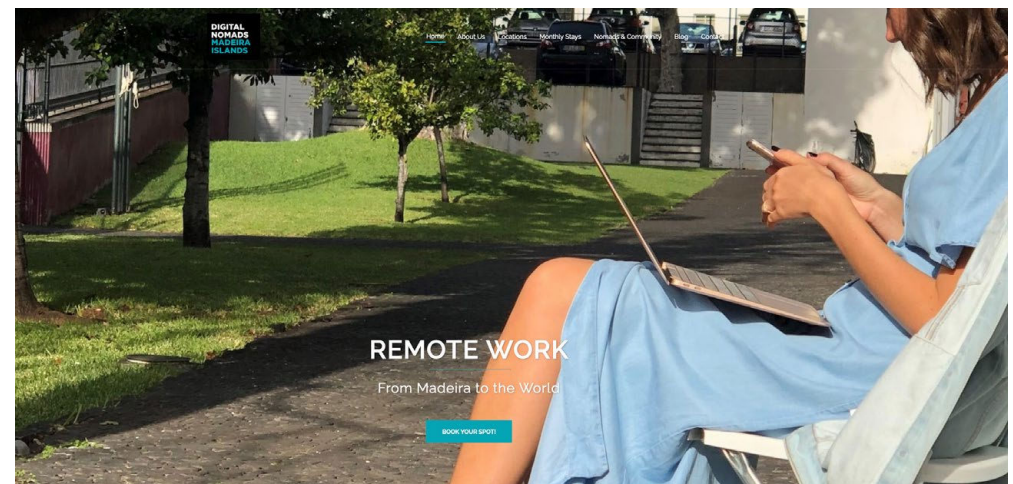
Until recently, the 'Digital Nomad' lifestyle was typically the domain of entrepreneurs and independent technology workers – free to work from far-flung locations with no fixed address. Now, we are seeing other demographics opt into the lifestyle as remote work opens to more professionals, and people seek a life and career change. To take advantage of this growing market, towns and accommodation providers are creating incentives to lure the remote working set to their shores.

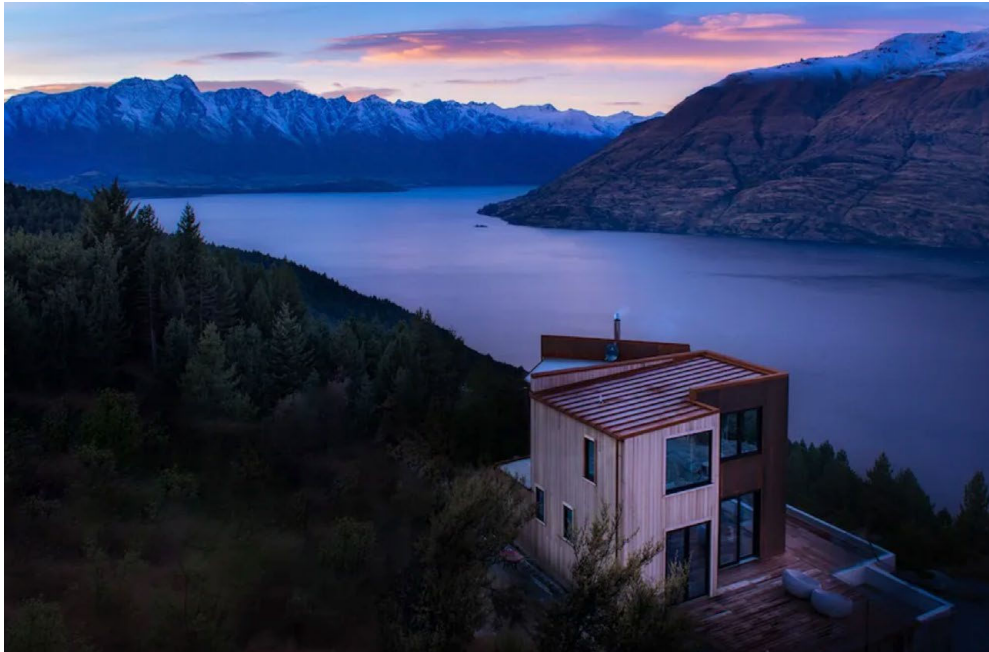
An enticing example is the Digital Nomad Village, a program launched by the coastal town of Madeira in Portugal. This 'utopia' for remote workers is a once-in-a-lifetime opportunity to be immersed in the local life of a new country. Up to 100 workers who commit to a one-month stay gain access to a free communal workspace, Wi-Fi and exclusive events, as well as the support of a local 'hosting' team and Slack community fostering interaction between the townspeople and nomads. The scheme celebrates the entrepreneurial spirit of travel while also providing clear benefits to the local economy,

particularly the growing number of unique, boutique hotels in the region. Created by a high-profile nomad along with the government and StartUp Madeira, the initiative is already slated for replication in a second Portuguese town.

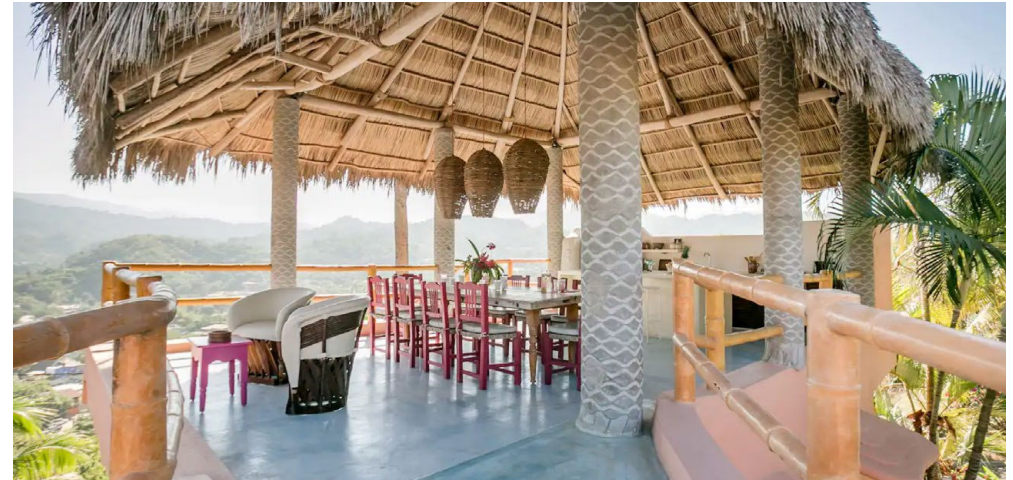
Other countries are following suit, with Malta, Mauritius, Iceland and the United Arab Emirates offering various visa incentives. Terms can range from 90 days to two years – if proof of certain income thresholds are provided. From this it's clear that many countries are feeling the burden of reduced tourism income, and such programs are providing an interim solution as the world gradually reopens.

*Digital Nomads – StartUp Madeira,
Madeira*





*Airbnb
Properties,
various
locations*



Platform Enablers

Accommodation platforms also have a keen interest in this trend, albeit from a slightly different angle. For instance, Airbnb recently launched the '[Live Anywhere on Airbnb](#)' program which gives 12 participants from diverse backgrounds the opportunity to live remotely in Airbnb listings. Participants curate their own adventure over a 12-month period – be it rediscovering their locale or globetrotting between exotic destinations. In essence, the program is a live research study for Airbnb, with participants engaging in ongoing structured video check-ins and written diaries to relay experiences and learnings. The insights will help inform product changes and

resources for different demographics, and ultimately support a better understanding of flexible living.

There's no denying this is a savvy marketing exercise by Airbnb. However, the diversity of its guests highlights that long-term remote living can be for everyone – with young families, empty nesters, people with disability and solopreneurs among the chosen few. As a result, this type of travel will be highly nuanced. Other operators and industry players would be wise to conduct their own user studies, with the intention of delivering more tailored and inclusive experiences.

Airport Attractors 2.0

Airports also have a role to play in supporting this shift towards blending business and leisure experiences. While this is already occurring in practical terms with increased workspaces and short-stay hotels (see Trend 01: Supportive Set-ups), it is also occurring through in-airport leisure and cultural experiences. The 'airport as attractor' trend has been growing for some time: Brickfields reported on this in the 2015 edition of The Place Report. The global exemplar is Changi Airport's Jewel and Shiseido Forest Valley, which is easily the world's most notable manifestation of this trend. But for airports that don't have the space and capital to make such investments, innovative events with huge cultural cachet are being staged instead.

A standout example was the debut fashion show for Louis Vuitton's 2020 resort collection at New York's JFK International Airport. Turning the former Trans World Airlines (TWA) terminal into a catwalk, the luxury brand made headlines – and the airport tested out a new way to grab the interest of travellers. High-brow programs like this help position the airport not just as a transitional space but as a destination – a place where travellers can have an enriching or exciting experience.

*Louis Vuitton Cruise 2020
Fashion Show Finale,
TWA Terminal (JFK),
New York City*





*Louis Vuitton Cruise 2020
Fashion Show Finale,
TWA Terminal (JFK),
New York City*

Singapore Airlines, first class cabin (seat 1A)



“In 2020, Singapore Airlines sold out its pop-up restaurant aboard an Airbus 380 at Changi Airport. This occurred only 30 minutes after bookings opened for a lunch or dinner in first class.”



Similarly inventive events were also used during the pandemic to maintain relationships between passengers and their local airports, with some proving to be considerable drawcards. For instance, in 2020 Singapore Airlines sold out its pop-up restaurant aboard an Airbus 380 at Changi Airport. This occurred only 30 minutes after bookings opened for a lunch or dinner in first class. Also on offer was the ‘2D1N’ sleepover experience, which featured a two-day, one-night program for families curated with playful and educational activities. Again, this was experience was quickly fully booked. This clearly shows an appetite for leisure experiences related to the joy of travel.

Although international air travel is possible again, some people cannot yet afford to travel, despite their aspirations. Events such as these, especially if affordable, provide an excellent way to connect with customers of different circumstances and make travel experiences accessible.



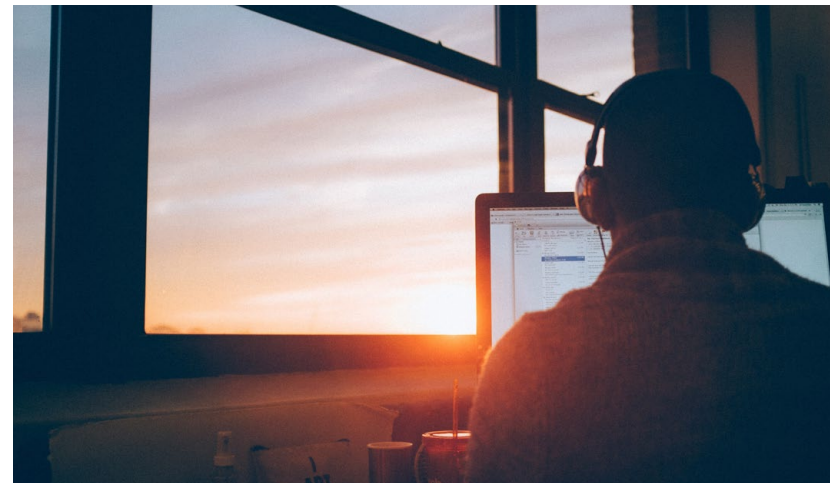
Not all leisure experiences need to be ephemeral – some airports are embedding arts and culture as permanent offerings.

Not all leisure experiences need to be ephemeral, and some airports are embedding arts and culture as permanent offerings. The first-class lounge for Qatar Airways in Doha, is one example which offers exclusive access to collections from the [Museum of Islamic Art](#). More inclusive options also exist, with Gstaad airport in Switzerland offering an on-site public art gallery, [Tarmac 22](#). The non-profit offers the space to established galleries during the winter season, and in addition

sponsors a less commercial summer program focused on younger artists. Collaborations are selected with care, with a key criterion being that the exhibitions give back to the local region. The benefit of these initiatives is multi-layered: local artists receive international exposure, while airports can build their social capital, becoming more localised and connected to the cultural fabric of their locations.



The Museum of Islamic Art, Doha



Insights and Implications

- As airports provide bolder traveller experiences, the potential exists for these 'city beacons' to focus on the grassroots – nourishing local communities in accessible and engaging ways.
- As remote working and long-stay travel becomes more widespread than ever before, we can expect the arrival of niche travel products, accommodation and services that benefit this traveller type.
- While incentivised nomadic programs have clear benefits to local economies, it's important that these plans integrate strategies for managing potential over-tourism. A harmonious balance of local resident and traveller needs will ensure the long-term sustainability of this practice.
- Changing work trends could impact airline routes. For example, we could see demand reduce on common, high-frequency business travel routes. On the flip side, digital nomads could create demand for new routes and destinations.



04

Conscious Travel

Motivations for travel are being renewed and redirected into adventures with loved ones, and pursuits for social and environmental causes.

04 Introduction

AutoCamp, Yosemite



Travel bans and time spent in isolation have seen travellers questioning how and why they travel. These new motivations are due to a range of reasons. For some, the driver is introspection, centred on self-actualisation and a want for meaningful relationships. As such, retreat programs are evolving to support navigating life and community connections. For others, a stronger priority is being placed on holidays with extended family and friends, to catch-up on missed milestones. This is evidenced by an Ipsos survey commissioned by Google, where 56 per cent of Americans are likely to participate in a life moment, such as a wedding, a move or new job, at some point in the next two years. In addition, 78 per cent of that group are considering travel related to those moments. Within this trend is the rise of multi-generational travel, and the new forms of accommodation which are catering to this group. Finally, consumers are becoming increasingly eco-conscious, and are preferring accommodation and operators which tangibly regenerate the social and environmental systems in which they are located.

Enlightened Experiences

For many, COVID-19 has been a time of introspection and purposeful questioning. We have seen this translate to a rise in consciously choosing where to live. Regional migration is up in much of the Western world facilitated by an increasing number of resignations and career changes. As people continue to recalibrate their lives, travel will naturally be sought as a means for self-exploration and enrichment. In response to this need, retreat programs are evolving beyond wellness to incorporate life coaching and values-based cultural experiences.

Bien Etre is a retreat provider that has expanded its offering into a virtual format, in direct response to pandemic restrictions. In an interview with Brickfields, co-founder Beth O'Brien-Gore related that the key driver for her customers in joining their retreats was a desire to connect and 'meet real people, and find a deeper sense of community and belonging'. This insight further supported the creation

of 'The Circle', Bien Etre's online community and personal growth platform for wellness enthusiasts to share their journey and grow alongside each other. Members are supported by 'The Directory', a list of global experts, who are on hand to provide personalised support and advice. This team also delivers webinars and workshops on topics including personal empowerment and engaging in meaningful work, to name a few. As retreats reopen in 2022, the connections cultivated online are set to make for even more meaningful experiences between members and experts.





Travelling with Purpose

Travellers are also seeking to be enriched by cultural experiences outside themselves which serve a higher purpose. While this is a pre-pandemic trend, there has been an increase in preference for this type of travel. For instance, Hands up Holidays, a luxury tour operator specialising in volunteer travel, has seen bookings for trips more than six months in advance being two and a half times greater than in January 2020.

Another operator connecting travellers with enriching programs is sustainable hotel operator, [Beyond Green](#). Many of its hotels are in remote locations and foster localised knowledge about pertinent social or environmental issues. For instance, the Three Camel Lodge in South Gobi, Mongolia has a conservation partnership with the not-for-profit Mongolian Bankhar Dog Project. Guests visit local homes to learn about training and herding initiatives as well as the wider context of protecting livestock and reducing human-wildlife conflict. Such experiences can have a lasting impact, not just for their spectacular context, but for the values of 'respectful exploration' and 'travelling with intention' that Beyond Green imparts to its guests.



*Above: Stay Beyond Green –
Bisate Lodge, Rwanda*

*Left: Stay Beyond Green – Maasai
Mara National Reserve, Kenya*

Regenerative Travel

Mounting awareness of climate activism and the negative impacts that travel can have on social and environmental systems has seen travellers become increasingly discerning about how, how often and how far they travel. According to findings by Booking.com 53 per cent of global travellers would like to travel more sustainably in the future. Further to this, 69 per cent expect the travel industry to offer more sustainable travel options, and 48 per cent plan to visit alternative destinations to avoid overcrowding.

Alongside such preferences is the growing – and necessary – movement of 'regenerative travel'. This goes beyond offsetting carbon, and focuses on actively improving the social, environmental and economic conditions of the host country.



*One Seed Expeditions,
various locations*





In support of this ethos, several operators are embedding regenerative principles into their business models and activities. One such hotel doing this is the GoldenEye hotel in Jamaica, which invests in the quality of life of the local community and environment via its foundation. For instance, social programs support skills, fitness and local agriculture, while environmental programs see the propagation of local reefs and sea turtle education and release programs. The hotel can be booked via the Regenerative Travel organisation platform which aggregates hotels with the highest

ethical and social standards. This makes it easy for eco-conscious consumers to direct their spend on places that align with their values.

Similarly, tour operators are also investing in the social livelihoods of destination communities, whilst wearing these credentials on their sleeves to attract ethically minded travellers. OneSeed Expeditions runs global adventure tours with suppliers vetted for being ethical, local and culturally underrepresented. Their mission is also to empower entrepreneurs, typically women in



*Golden Eye Resort,
Jamaica*

developing countries, to launch or expand their businesses. They do this by donating 10 per cent of their proceeds to offer zero-interest loans. Although travellers don't directly engage with the entrepreneurs they have supported, they can be satisfied knowing their dollars have helped diversify local economies and non-tourism based businesses.



Above: Black Tomato – The Lodge at Blue Sky, Utah

Above Right: Black Tomato – Madeline Hotel, Colorado



Multi-generational Jaunts

As a result of separation from loved ones and missed milestones – travellers are placing a priority on holidays with friends and extended family. Evidence of this is the rise in group bookings for tours and accommodation both close to home and abroad. For instance, Big Cottages, a group accommodation site in the UK, reported a six-fold rise in bookings for groups of over 20 people after COVID-19 restrictions were lifted. Further, Black Tomato, a luxury travel agency, saw a 61 per cent increase in exclusive-use properties, according to online news publication Fortune.

To meet this demand, accommodation providers are iterating their offerings. A key example is the resort-style Aspen Valley Ranch in Colorado, which developed an additional six dwellings in May 2021. Titled 'The Residences', the luxury homes support the increased demand in multi-generational bookings in low-season periods. Homes have access to the ranch's amenities – pool, arcade and equestrian fields – and are serviced in similar ways to a hotel but provide a more relaxed experience.

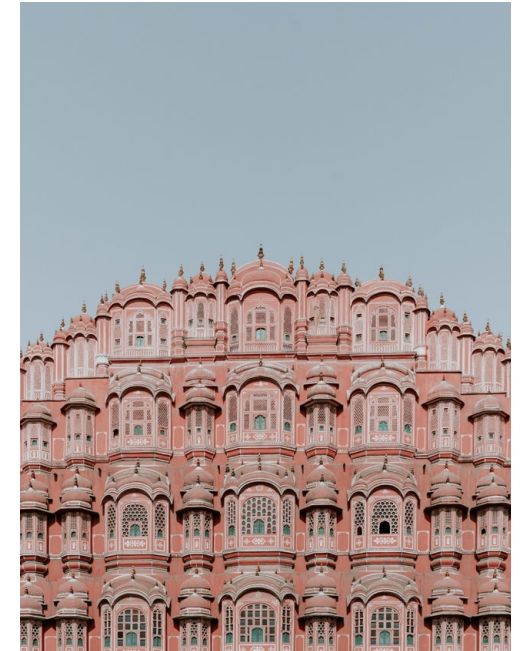
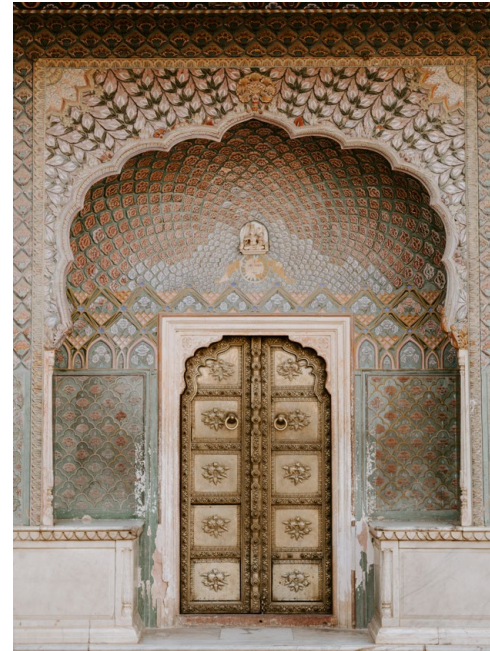


AutoCamp, various locations

Bookings for adventurous holidays are also popular among these groups. Those seeking the great outdoors are being met by a new breed of turn-key camp sites rich in amenity. One such example is [AutoCamp](#) in Yosemite National Park, California. Families can book a cluster of units within the landscape, ranging from spacious tents to cabin suites and even Airstreams. Providing hotel-like conveniences, the on-site Clubhouse has a reception, boutique, social spaces, game equipment, and an outdoor pool with towel service. This level of amenity and convenience is very important when catering to multi-generational groups who value hassle-free trips.

Another rising preference within family and multi-generational holidays is the desire for immersive, educational experiences. At the luxury end of the market, travel agency [Black Tomato](#) has launched 'Field Trips', a series of educational modules pitched at children 12 years and over. According to co-founder Tom Marchant, this meets a surge in demand from their UK and US family market, which seeks to enrich their children's personal and academic development and

inspire potential future careers. Travel experiences span STEM experiences in Geneva at the CERN nuclear reactor, social studies on female narratives in Israel, and archaeology trips in Egypt. Beyond the individual, such experiences can also enrich the family dynamic, with new topics to debate, further research, and perhaps even lead to a future family business. While these experiences are spectacular for those who can afford it, it would be excellent to see a future where luxury tour operators develop travel scholarships for other demographics to experience them.





AutoCamp, Yosemite



Insights and Implications

- While multi-generational travel is showing great growth in villa and hotel bookings, it is important that local city and regional governments continue to monitor this trend to ensure that enough private property remains in the rental market to support local communities.
- The travel sector has the power to support social resilience and the regeneration of our planet. Naturally, this needs to occur through meaningful engagement with local contexts to ensure practices do not inadvertently cause harm. Further to this, operators and airports should feel empowered to trial these types of programs.

A final word

A bright future – quotes from industry leaders

At Brickfields Consulting we are keen collaborators, knowing that any project is made richer by the collective imagination and optimism of our peers. Once again, we have reached out to our global network of clients and collaborators to capture their perspective on what the future holds for neighbourhoods.

We asked:

For owners and operators of travel infrastructure and experiences – what do you see as the biggest opportunity for the future of travel?

Here's what they said:

On market shifts

"The ongoing pandemic is still impacting the hospitality sector's development into the future ... but we believe in 2022 we'll see a stronger recovery, with capital flowing to the region. Long-term confidence is very evident."

Tao Zhou, Managing Director, Jones Lang Lasalle

"Demographically speaking, more than half of the Baby Boomer generation is already of retirement age. They are wealthy, healthy, and keen to see the world after two years of lockdowns. They feel it's their time now to enjoy the fruits of their labour."

Simon Kuestenmacher, Co-founder
The Demographics Group

"In the post-COVID era, tourists value quality over quantity, and the tourism industry needs to shift its focus from sightseeing-oriented travel to true holiday breaks."

Ma Jun, Deputy General Manager,
Shanghai International Tourism and Resorts Zone Properties

"Acknowledging the emotional side of travel and ensuring we're a trusted partner on their entire journey, from services and information to built and digital environments, is a huge opportunity. There is so much that has changed during the pandemic, but the fundamentals have remained the same, and in many ways they have risen to even greater importance."

Karen Halbert, Executive General Manager Corporate Affairs,
Sydney Airport Corporation

On reinvention

"The pace of change through COVID in technology, information and engagement has been exponential and is likely to continue. As travel returns we will see changing needs and behaviours in our travellers and customers as the new ways of remote living and working evolve. One of our biggest opportunities is to be smart in how we harness the use of 'information in the moment' to deliver services and experiences that are engaging, efficient and welcoming to all who travel through the airport."

Simon Gandy, Chief of Infrastructure, Melbourne Airport

"It's the chance to do something different. People are on the hunt for unique experiences that can provide them with memories ... If there was ever a time to be brave with choices, really go in on an existing idea or come up with something completely new, the time is now. You don't need to be slick or strategised either. Club Jupiter is proof of that - just three girls with a small dream and an Instagram account."

Emma Jane Palin, Co-founder, Club Jupiter

"We continue to see new models of hotels and guest experiences emerging; many of which take into consideration the blurring of boundaries and the way in which the attribution of value is changing. These new models which challenge the 'Star-rated' stalwarts, put emphasis on value in other ways – curated experiences, business/leisure cross-over, hotels as social space, place and nature-based hotels. With the above in mind, it seems necessary to rethink where we put effort and expenditure into the design and to think with a guest experience and innovation first approach."

Fabio Ongarato, Co-Founder and Creative Director, Fabio Ongarato

"The outdoor industry is going through the same transformation that the hotel industry did years ago. Leveraging marketplace sites like The Dyrft, Expedia and Airbnb for extra reach and targeted outdoor-focused vacation goers is just now coming into its own."

Sarah Smith, Founder, The Dyrft

On future experience

“Being physically present and sharing real time and spaces with people have gained even greater currency for being so rare in the last two years, but travellers are also looking for more information, more assurance, than ever before. The opportunity is to be the facilitator of these human connections, providing not just the place for this to happen, but also playing a true partnership role for travellers as they return to airports.”

Karen Halbert, Executive General Manager Corporate Affairs,
Sydney Airport Corporation

“Authentic, differentiated experiences that enhance both the customer experience and optimise commercial value are the future of travel retail. A proposition that is ‘of the place’, planned and designed to offer space and comfort whilst allowing customers to control their own journey, will create the ideal ecosystem in the travel retail environment.”

Susan Gray, Managing Partner, CPI

“As humans, we are desperate to re-connect with places and the people that inhabit those places. Yes, owners and operators need make sure that the guest hardware and service is up to scratch, but the future of travel seems to place an increasingly greater value on creating experiences that are unique, memorable and authentic. This means a greater focus on localisation, getting a little off the beaten track and building a deeper connection within our own backyard.”

Andrew Taylor, Managing Director, Co-founder & Chief Executive Officer
Cre8tive Property

On future experience

"I think the importance of leisure tourism and new 'experiential' destinations and holidays will be a norm. Where people travel for experiences, we become more conscious of our environment, the people and community of the places we travel too. Also where a retreat programme at a spa and wellness resort will be an essential element for business executives as part of their annual travel plan."

Nathalia Wilson, Director of Development, South East Asia & Korea, IHG

"True oriental luxury is the biggest opportunity for the future of Chinese travel. New, expanding domestic middle-class demand and consumption have been hot topics in the travel industry during COVID-19, and we see that continuing well into the future."

Philip Wei, Founder, BTL Hospitality Group

"I believe the biggest opportunity for the future of travel lies in travel efficiencies and customer experience. We need to be the cause of people's happiness. I think the nature of travel has changed significantly over the last decade. Historically, travel was a means to an end - getting from A to B. Consumers have more choice than ever before, which means there is a need for owners and operators to redefine the travel experience so that it is enjoyable and not just a task. This means focusing on providing something for everyone - personalising, tailoring, curating and above all, creating happiness."

Gert-Jan de Graaff, CEO Brisbane Airport Corporation and Board Member of Australian Airports Association

On purpose

"Within an ever-evolving industry, we see our biggest opportunity as staying unique and true to ourselves, our brand and our values. Sustainability is at the core of our operations and is something we believe we can work with operators across all facets of the industry to continually improve on. Additionally, post-COVID and its impact on travel, we think offering contactless check-in, a boutique experience, and an unwavering commitment to quality is the strongest future-proof approach."

Jason and Eliza Raine, Founders, Mysa Motel

"The biggest opportunity is meaningful travel, people want to travel with purpose. Particularly post-COVID, people are reassessing the composition of their lives and want to address where things are lacking. Travel is no longer just about seeing sights, but rather having a more multi-dimensional experience."

Beth O'Brien-Gore, Co-founder, Bien Etre

"Over the past decade we have seen a shift in consumer values towards the value in experience. As such the concept of Longhouse, was about embedding Travel and Agriculture (Agro-tourism) with Events that capitalised the learning economy. Our focus was to look to design and architecture and a key tenant of our offer, and as a driver to bring about greater awareness around the importance of food, coalescence, ritual and 'traditions reinvented'."

Ronnen Goren, Co-founder and Director, Visitor Experience, Daylesford Longhouse

"Embracing the appetite to 'build back better', Original Travel believes that the future of tourism is to 'Travel Less, Travel Better' and we're encouraging clients to make a positive change in the way we explore the world. We have launched a new collection of itineraries featuring philanthropic holidays, responsible travel, slow travel, rail and road trips and sabbaticals; trips that will encourage travelling for the greater good."

Tom Barber, Founder, Original Travel

On sustainability

"As it rebuilds, the travel industry has a unique opportunity to address any negative impacts associated with it. For example, air travel could increase focus on resilience, underpinned by strong environmental and social sustainability principles."

Mark Wolfe, Aviation Lead, HASSELL

"Climate change, and decarbonisation, is our greatest challenge. In addressing it, the development of genuinely net-zero transport; not for single modes, but for transport as a system, offers a massive opportunity. Those acting as a catalyst for this will prosper."

Ian Taylor, Global Aviation Business Leader, Arup

On mobility

"The future of travel will be determined not only by the existence of Covid, but by the certainty of free movement of people across borders within a Covid context. It's confidence and certainty of consumers that needs redress, as much as Covid itself."

Christopher Brown AM, Former Special Advisor to the Secretary General,
UN World Tourism Organisation

"The electric-kinetic revolution will merge short and medium length journeys in to a single mode of connectivity linking airports, urban nodes and individual dwellings. Traditional travel termini will become points of convergence and connection stimulating new opportunities for exchange, commerce and service."

Matthew Butters, Aviation Director, Pascall+Watson and Deputy Chair British
Aviation Group

On technology

"We expect the introduction of new airport technologies, both for security purposes and more efficient travel, will continue at pace, with biometrics playing a greater role in aviation and ultimately leading to a completely contactless experience from check-in to boarding."

Kym Meys, Executive General Manager of Planning and Infrastructure
Adelaide Airport and Board Member of Australian Airports Association

"For us the opportunity is to provide our customers with a response to their real hygiene and safety concerns, accelerating wellness trends and their desire for certification, sanitation and screening in physical spaces. An opportunity to meet our customers increased expectations for automated human interactions and processes including contactless processing."

David Eden, Chief Projects and Development Officer, Perth Airport

Credit

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Trend 01

AtYourGate
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SkyLane, Los Angeles
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Aerotel, London (various locations)
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Kids Care Station
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Mysa Motel, Gold Coast
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Future UK Rail

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Fast Rail Future

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Sea from the Sky

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Trend 03

Ovolo, Sydney

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Person using a Laptop

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View from Up High

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Window or Aisle Seat, Sir?

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Commute and Stay

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Wojo (Grand Lyon)

Image sourced from Wojo
(wojo.com/en-us/workspaces)

Digital Nomads

Images sourced from StartUp Madeira
(digitalnomads.startupmadeira.eu)

Live Anywhere (various locations)

Images sourced from Airbnb
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Work Play Pass

Images sourced from Marriott
(workanywhere.marriott.com)

Louis Vuitton Cruise 2020 Fashion Show Finale

Images sourced from Louis Vuitton
(youtube.com/watch?v=9BBOQhwGmKw)

TWA Terminal, JFK Airport

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Seat 1A

Image sourced from Singapore Airlines
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dining/)

The Chicken or The Beef?

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(singaporeair.com/en_UK/us/flying-withus/
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Museum of Islamic Art

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Going somewhere?

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Maasai Mara National Reserve, Kenya
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GoldenEye Resort, Jamaica
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Black Tomato
The Lodge at Blue Sky, Utah
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Madeline Hotel, Colorado
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AutoCamp
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Field Trip
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AutoCamp
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Our Team

Researchers

Stephanie Bhim
David Grant
Heidi Krohn
Jeanette Lambert
Natalie Louey
Annie Scapetis
Mark Wolfe

Producer

Belinda Lord

Writers

Stephanie Bhim
Joanna Richardson

Editor

Ginny Grant

Design

Michelle Teh

About Brickfields Consulting

We empower our property clients with the insight and strategic guidance they need to capture the true value of place.

Brickfields Consulting specialises in evidence-based strategies empowering our clients to deliver successful places. We deeply understand our clients' customer, and the trends driving them, to unlock the true value of place. For over a decade, we have been translating customer insights into strategies that enable our property clients to exceed expectations.

About HASSELL

Hassell is an international, multi-disciplinary design practice with studios across Australia, Asia, the UK and the US.

Our purpose is to design the world's best places – places people love. We do that by bringing together the best designers and thinkers in a unique, collaborative process that results in both beautiful design and measurable value. Our practice is enriched by additional capabilities in strategy, research, technology and experience design, as well as partnerships with experts from further afield. Through our work, we're trying to build a more inclusive, sustainable future for communities and a more ecologically resilient world.