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# EWAA Tourism III

## Trends, Impacts, and the Future of EWAA

August 2023



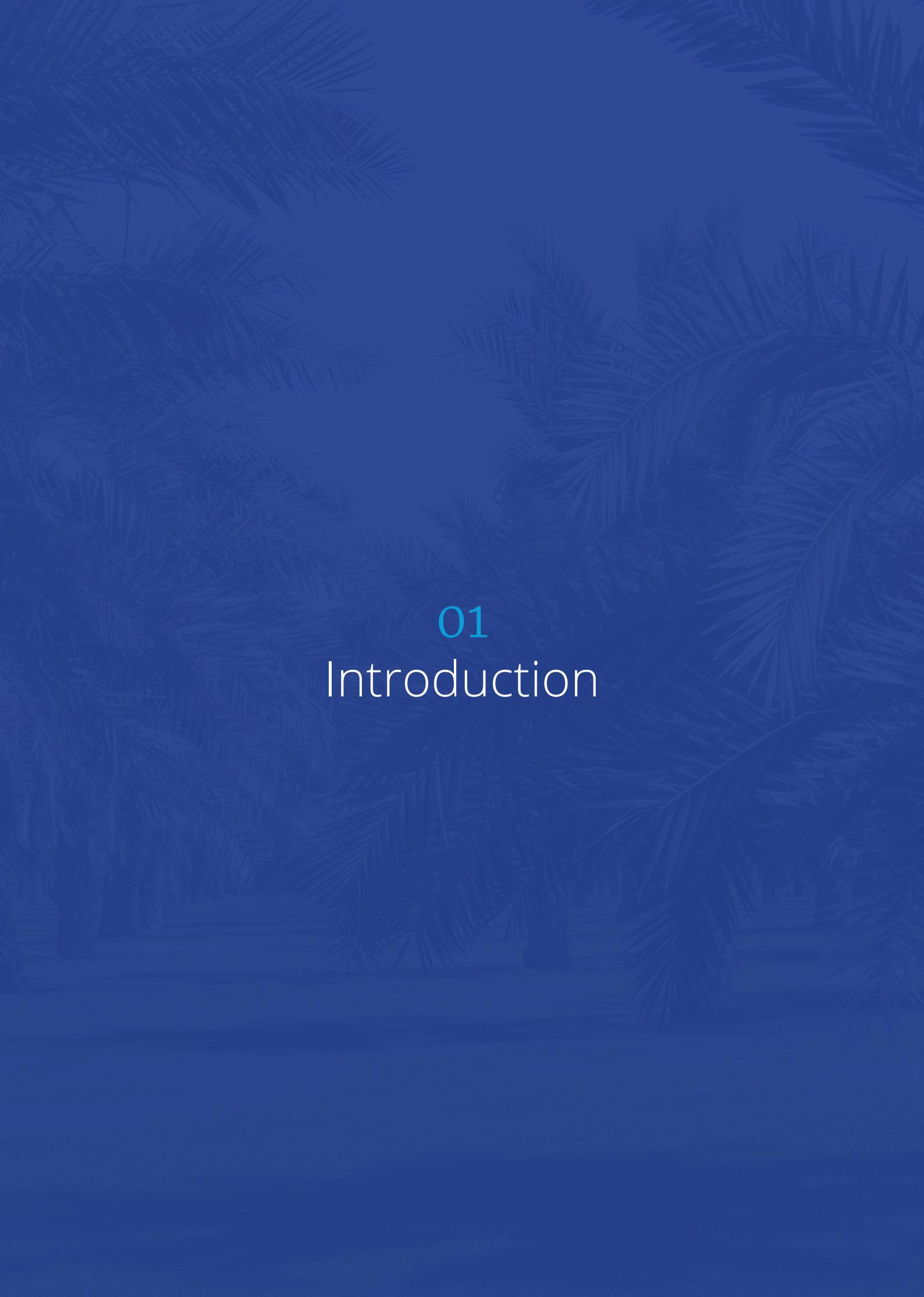
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01  
Introduction



EWAA (Eco, Wellness, Adventure, and Agritourism) embodies a sustainable tourism model centered around immersive experiences inspired by local environments and respectful interactions between visitors and host communities. While not a new concept, EWAA tourism is becoming increasingly popular in secondary cities throughout the MEA region.

This third edition of the EWAA series focuses on the potential of modular construction for relevant assets and examines the impact of EWAA tourism on the local economy and community. In conclusion, this paper emphasizes on the importance of responsible and sustainable decision-making throughout the life cycle of an asset, a crucial approach shaping the future of this alternative form of tourism.

Previous issues of the EWAA papers can be found here:

[EWAA I](#) | [EWAA II](#)

## Regional Landscape

Within the MEA region, EWAA tourism's success stories are abundant in countries like South Africa, Tanzania and Namibia, where they have expertly utilised their natural landscapes and strong cultural influences to deliver unique visitor experiences. Be it the development of eco-lodges like South Africa's Grootbos Private Nature Reserve, Tswalu Kalahari Reserve, or Namibia's communal conservancy program, the countries in dark blue stand as paradigms of successful EWAA tourism implementation.

Emerging tourist hotspots, particularly in the Middle East, are transforming their rural landscapes to create captivating, destination-centric experiences that stimulate local economies. Markedly, KSA and the UAE are investing significantly in EWAA, backed by solid governmental initiatives, including financial aid and policy formation. Notable examples include the Al Marmoom Desert Conservation Reserve in the UAE, AMAALA's planned Clinique La Prairie, Jayasom, Rosewood resorts - the unveiling of over 40 adventure-related projects in Oman, the 'Al Khayyat' farm in Al Ahsa, KSA and the strong ongoing agritourism drive in Al Ahsa Oasis, known for its rare Hassawi rice.

The agritourism in KSA is being promoted through initiatives like the 'Saudi Agricultural Development Fund' which supports local farmers and encourages farm visits. Al Ahsa together with Taif, Abha, Al Ula and Jouf display great potential for this sector. The Taif region is particularly well-known for its fragrant rose gardens and farms, which not only contribute to the local economy but are also a major tourist attraction. Al Ula and its rich resource in date palm trees stands at as the heart of the ecosystem by providing shading layers to citrus trees, cereals and aromatic herbs.



# Selection of Existing EWAA Projects



**Babylonstoren, South Africa**

Eco | Wellness | Agri



**Habitas AlUla, KSA**

Eco | Wellness



**Savute Elephant Lodge, Botswana**

Eco | Adventure



**Ma'in Hot Springs Resort, Jordan**

Wellness



**Hatta Sidr Trailers Resort, UAE**

Adventure | Eco

Source: The National; Google Maps; Construction Weekly; Colliers, 2023

The background of the page is a solid blue color with a faint, semi-transparent image of a construction site. The image shows a large, dome-shaped structure under construction, with scaffolding and other construction elements visible. The scene is set against a light sky, suggesting an outdoor environment.

02

# Focus On: Modular Construction



Modular design and construction is an innovative building technique which includes pre-fabrication of modules off-site. Following a standardised construction process, the modules are then transported and assembled into the final product on-site. This can lower the overall environmental impact on the site and its surroundings, in addition to realising earlier revenue generation, thereby enhancing ROI.



# Traditional Build vs Modular Build

Herein, we highlight key features of modular construction compared to the traditional method.

Item	Traditional Build	Modular Build
<b>Construction Process</b>	<ul style="list-style-type: none"><li>• On-site sequential construction</li><li>• No standardisation</li></ul>	<ul style="list-style-type: none"><li>• Off-site fabrication   On-site assembly</li><li>• Standardised method of construction</li><li>• Potential to significantly reduce wastage</li></ul>
<b>Project Timeline</b>	<ul style="list-style-type: none"><li>• Less time-saving opportunities</li><li>• Sequential timeline</li></ul>	<ul style="list-style-type: none"><li>• Modules fabricated off-site</li><li>• Simultaneous work done on-site</li><li>• Enabling time-saving opportunities</li></ul>
<b>Flexibility</b>	<ul style="list-style-type: none"><li>• Flexible until start of construction</li><li>• Challenging to relocate, expand, or upgrade</li></ul>	<ul style="list-style-type: none"><li>• Modules can be customised as per project requirements with the opportunity to scale and upgrade in the future</li><li>• Reuse and repurpose: Following conclusion of short-term events, modules can be disassembled from one structure and reassembled in another</li></ul>
<b>Environmental Impact</b>	<ul style="list-style-type: none"><li>• Possible noise pollution</li><li>• On-site waste disposal</li><li>• Proper planning can limit impact</li></ul>	<ul style="list-style-type: none"><li>• Waste reduction &amp; controlled production</li><li>• Off-site production results in minimal disruption to site surroundings</li></ul>
<b>Typology Suitability</b>	<ul style="list-style-type: none"><li>• Suitable for most typologies: resorts to villas to high-rise towers</li><li>• Less suitable for mobile structures</li></ul>	<ul style="list-style-type: none"><li>• Suitable for low-rise buildings including resorts and mobile structures</li><li>• Less suitable for high-rise towers</li></ul>

# Modular Builds and Unit Cost Ranges

Modular build structures have varying costs based on size, materials, positioning, and types.

Additional expenses, such as those listed below, often accompany modular builds and must be considered when comparing costs with traditional methods to determine the actual saving potential.

- On-site assembly
- MEP
- Furnishing
- Transportation
- Infrastructure



## Mysk Kingfisher Retreat, UAE

**Tents**  
**Shell & Core**  
AED 100k – 350k+



## Caravan by Habitas, KSA

**Trailers**  
**Shell & Core**  
AED 250k+



## Riverstones FamTin, South Africa

**Containers**  
**Shell & Core**  
AED 175k – 515k+

Source: Booking.com; Terra Solis; Habitas; Riverstone House; Bespoke Modular Solutions; Colliers, 2023

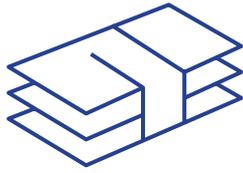
“Modular construction dramatically transforms the building process, accelerating execution by up to 50% while reducing waste by 80%. This method expedites ROI, enhances efficiency, minimises site disruption and aids in protecting natural habitats and ecosystems.” *Bespoke Modular Solutions*

03

# Impacts of EWAA on Host Destinations



The introduction of EWAA tourism into a previously unaltered, untouched community and landscape can have both positive and negative implications on the host destination. To reap the benefits and minimise the negatives, planning and management are key. This could involve implementing strict environmental regulations, offering education programs for tourists, fostering community engagement and ensuring that the economic benefits of tourism are equitably distributed within the community.



Economic Implications	Environmental Implications	Social Implications
<b>Job Creation</b>	<b>Habitat Conservation</b>	<b>Cultural Ambassador</b>
<p>The creation could be direct or indirect as external companies might benefit from additional traffic in the destination.</p>	<p>The EWAA concept could be an active player in preserving the natural environment in its surroundings by contributing to its regeneration.</p>	<p>Tourists may be inspired by the practices of the local inhabitants, which they can then spread to their community.</p>
<b>Basic Infrastructure Development</b>	<b>Local Material Sourcing</b>	<b>Vocational Education</b>
<p>The creation could be direct or indirect as external companies might benefit from additional traffic in the destination.</p>	<p>To be considered during the development phase for the choice of material as well as in operations.</p>	<p>Trained individuals can apply their skills to improve the community and also succeed in other similar positions.</p>
<b>Poverty Alleviation</b>	<b>Increased Tourist Awareness</b>	<b>Social Inequality</b>
<p>Through income generated by local businesses as a result of increased footfall to the city yet tourist demand could lead to local price adjustment.</p>	<p>About the beauty and richness of the region as well as the environmental challenges and how those could be mitigated.</p>	<p>Preference of external human capital employment over local population could lead to further poverty and marginalisation.</p>
<b>Economic Diversification</b>	<b>Increased Footprint</b>	<b>Cultural Erosion</b>
<p>Providing an alternate source of income can enhance resilience of the economy to market fluctuations and shocks.</p>	<p>The introduction of a non-natural structure in nature and the implications of the same (i.e. increased footfall)</p>	<p>Without proper planning, there can be a loss of local culture due to external influences from external tourists and guests.</p>
<b>Competition to Local Offering</b>	<b>Waste Management</b>	<b>Disruption of Lifestyle</b>
<p>Local players might be offering similar services in rooms accommodation, transport, F&amp;B.</p>	<p>The production of waste and its disposal can lead to an increase in the environmental footprint.</p>	<p>Local communities may have to adapt to demands of tourists which can result in shifts in traditional behaviours.</p>

# Real-Life Destination Examples

## Masai Mara, Kenya

- Conservation efforts
- Tourist education
- Soil erosion
- Overtourism
- Waste Management
- Disturbance to wildlife



## Dead Sea, Jordan

- Vocational Education
- Cultural Exchange
- Support of Local Businesses
- Unregulated Tourism
- Depletion of Water Resources
- Over-commercialization



Source: *Luxury Frontiers; into Hospitality; Colliers, 2023*



04

# The Future of EWAA Tourism

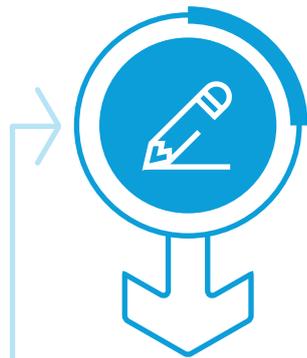


The asset life cycle encompasses the journey of a development from concept to re-purpose/retirement stage. For EWAA concepts, the concept phase which must include a detailed destination study emerges as crucial for the project success, wherein the story and purpose of the project are defined. These form the core of development and guide decision-making through a holistic approach.

Beyond the physical structure, the strength of the concept relies on the coherence and consistency between the story telling, design, service offering and social and ecological initiatives. Developing EWAA assets may require more time and financial resources compared to urban products, but proper resource allocation at the early stage can yield favourable returns. The key points to be considered for each phase of an EWAA project's life cycle are highlighted on the page.

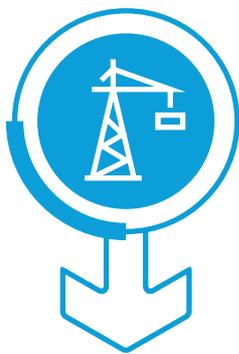


# The EWAA Project Life Cycle



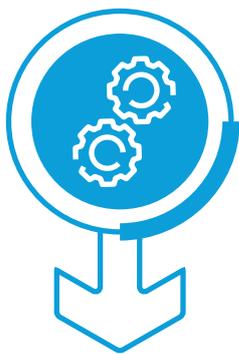
## Concept

- Destination study
- Concept positioning, purpose and role
- Licensing and permit timeline
- Defining the guest journey touchpoints
- Stakeholder mapping
- Construction type (modular vs traditional) & maintenance costs
- Business plan including financial viability



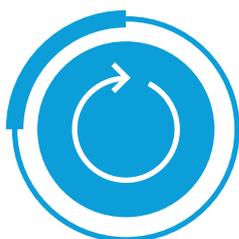
## Development

- Choice of materials (locally available, sustainable, low-impact, etc.)
- Well-defined and realistic timeline
- Employee recruitment and training (especially if employees need vocational education)
- Partnering with third party organisations (NGOs, Local Businesses, etc.)



## Operations

- Continuous improvement and training
- Local business integration
- Local craftsmanship promotion
- Impact measurement (social metrics, sustainability KPIs)
- Ongoing partnerships with third party organisations



## Refurbishment/Retirement

- Upscaling with physical changes
- Expansion without modifying existing structure, for example, 'Add-on' satellite camps
- Re-working or updating the guest journeys based on customer needs



480  
offices in

66  
countries on

6  
continents



\$4.5B  
in revenue



2B  
square feet under management



18,000+  
professionals

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