



PHUKET BREAKFAST BRIEFING

LOOKING FORWARD:
**WHAT DOES 2023 HAVE IN
STORE FOR PHUKET'S HOTEL
AND TOURISM INDUSTRY?**



Friday, 3 March 2023
09:30 - 11:30 hrs.



Boat Point Room
NH Boat Lagoon, Phuket



BILL BARNETT

Founder and Managing Director of Asia-based C9 Hotelworks and the Founding Advisor of the Phuket Hotels Association



BJORN COURAGE

President of Phuket Hotels Association and General Manager of the InterContinental Phuket Resort



DAVID ARELL

COO of Development Management Group and a LEED AP - Edge Expert



BDO IN THAILAND

Making a difference

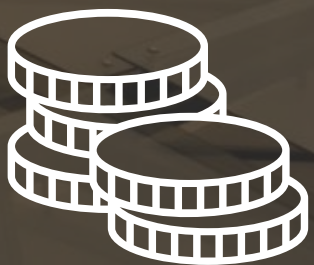
Breakfast briefing
3rd March 2023

BDO

BDO GLOBAL STATISTICS 2022

GLOBAL REVENUE

US\$12.8 billion



+12.1%

REVENUE INCREASE

(at constant exchange rates)

PERCENTAGE
REVENUE BY
REGION



PEOPLE

1,803 OFFICES

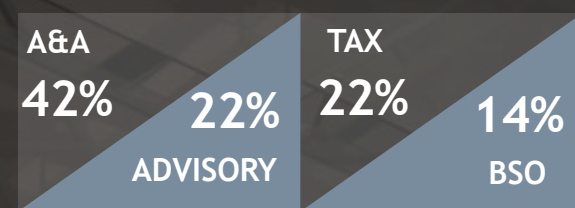
164 COUNTRIES & TERRITORIES



111,307

PEOPLE **+14.4%**

FEE SPLIT
BY SERVICE
LINES



The background of the slide is a teal gradient with a multitude of small, colorful rectangular confetti pieces falling from the top, creating a celebratory atmosphere.

No.1

Most active M&A Advisor globally

Most active Advisor &

Accountant globally

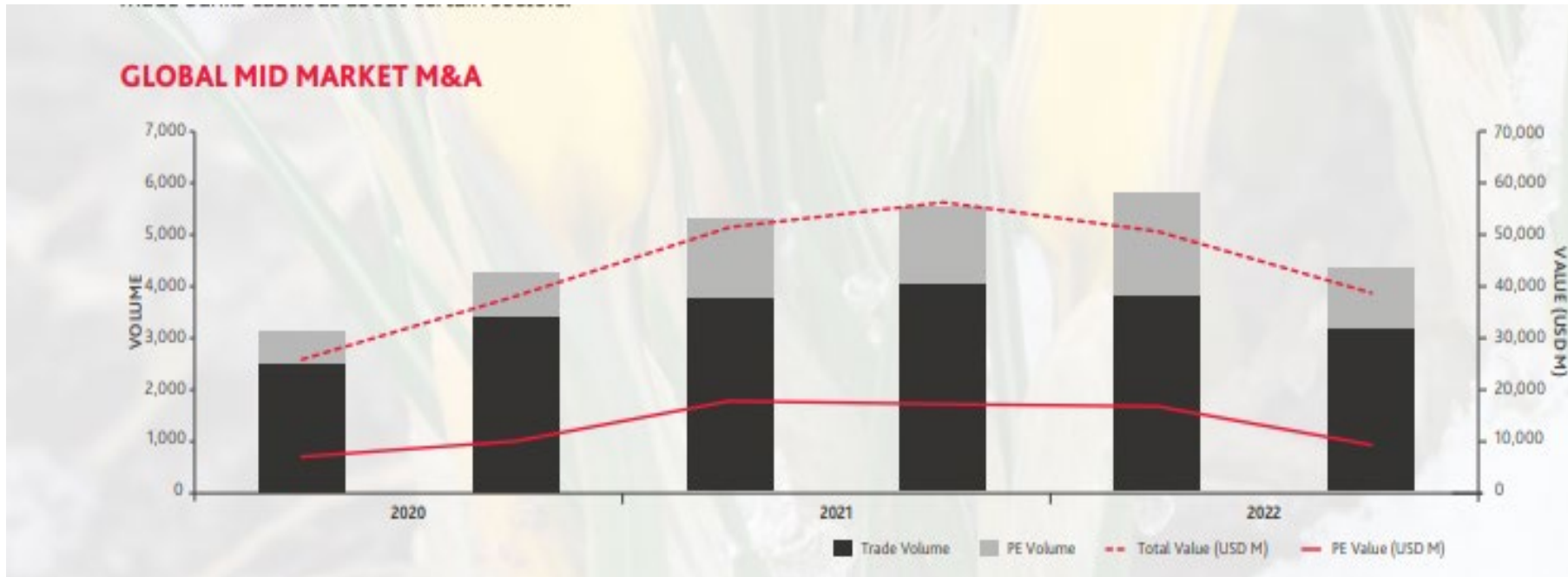
Pitchbook league tables 2022



MARKET DYNAMICS

Agility is the key to sustainable success

- Growing economic self-sufficiency
- The War for Chips and power of Semi-conductors
- India - KSA - Brazil
- ASEAN will most probably profit from global geopolitics
- ESG: Emission reduction, heightened scrutiny of social issues and increased reporting of non-financials
- Inflation, cost of Energy, recession leads to increased political instability and potential social unrest
- Need for agility in unpredictable times



WHERE FUND MANAGERS WILL DIRECT THE MOST CAPITAL IN THE NEXT SIX MONTHS

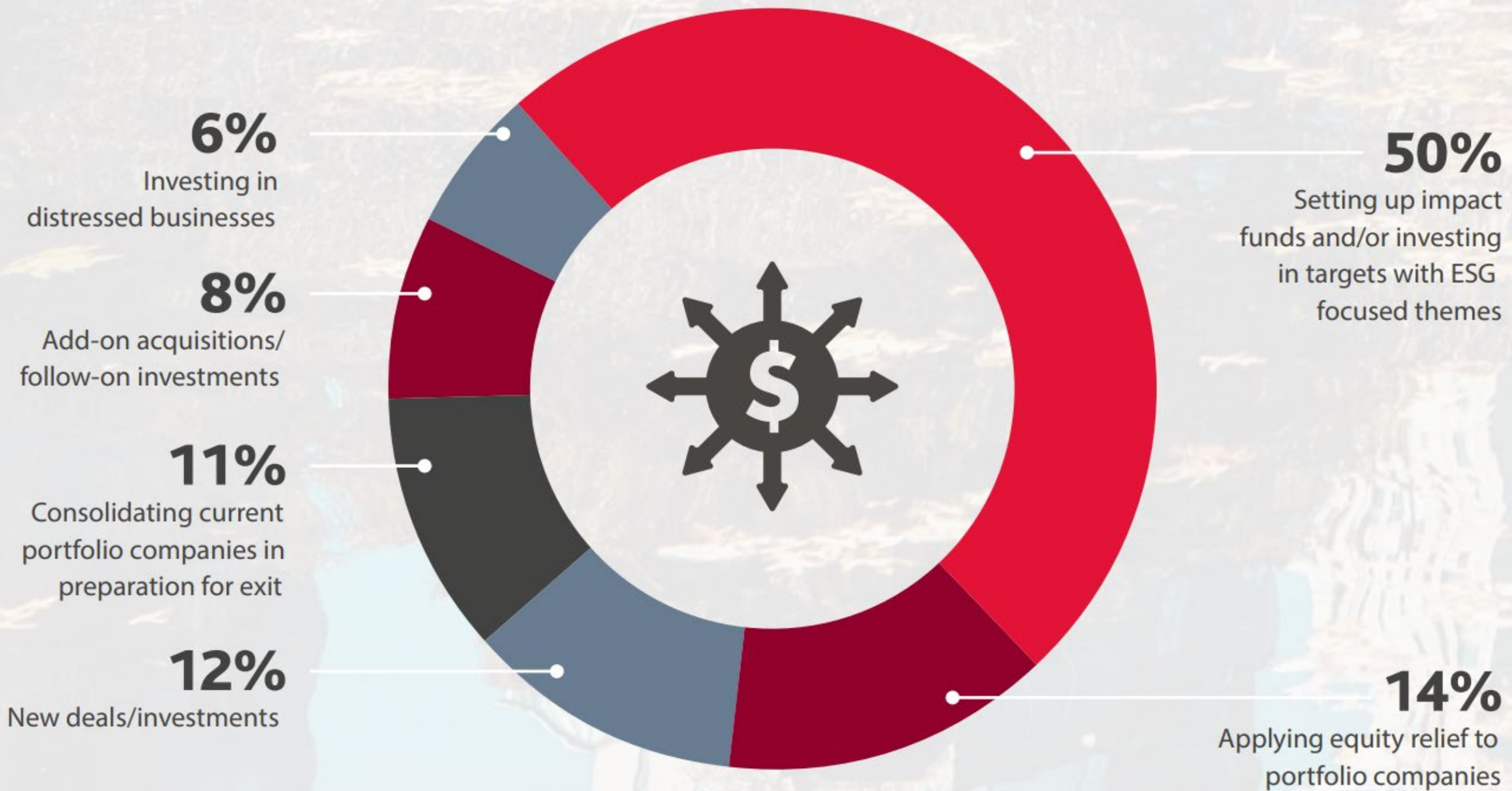
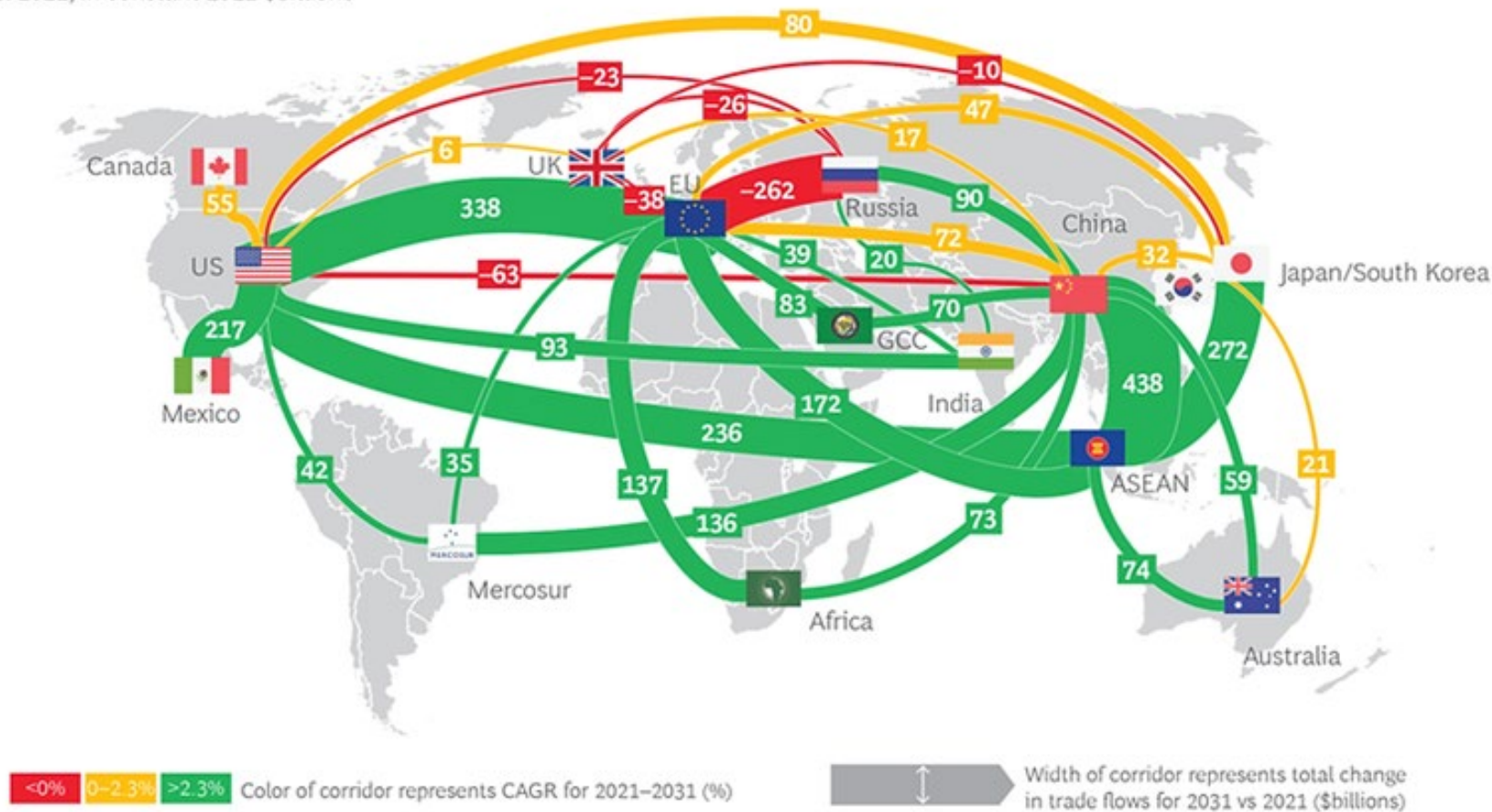


Exhibit 1 - Future of Trade 2031 Outlook: Geopolitical Tensions Contribute to Reshaping Trade Flows

Change in trade of goods, major corridors¹
2031 vs. 2021, in constant 2021 \$billions



Sources: UN Comtrade; Oxford Economics; IHS; WTO; BCG Global Trade Model 2022; BCG analysis.
Note: Estimated inflation-adjusted trade growth within the EU by 2031 will total \$1.5 trillion at a CAGR of 1.8%.
¹The corridors shown in the map represent ~46% of global trade.

The principal beneficiary of the redrawn trade map arising from the continuing China-US tensions and the effects of the Ukraine war.

ASEAN trade with China will grow by \$438 billion, the largest interregional increase on the 2031 map below.

Companies will be attracted to Southeast Asia by the region's lower costs and the growing breadth and depth of its manufacturing capabilities.

Immediate opportunities for Phuket

- Innovation when applying for Board of Investment privileges is required to obtain tax benefits
- Foreign direct investment largely USA, China, Japan and Korea
- International schools and medical partitioners will benefit from the migration of expat workers
- Thought in to the structuring of property transactions is required to optimize tax leakage and minimize risk
- Mergers & acquisitions of both branded and non branded hotels as price expectation alligns





C9 HOTELWORKS

Phuket

Hotel Market Update

March 2023

Phuket Airport Arrivals – 2022

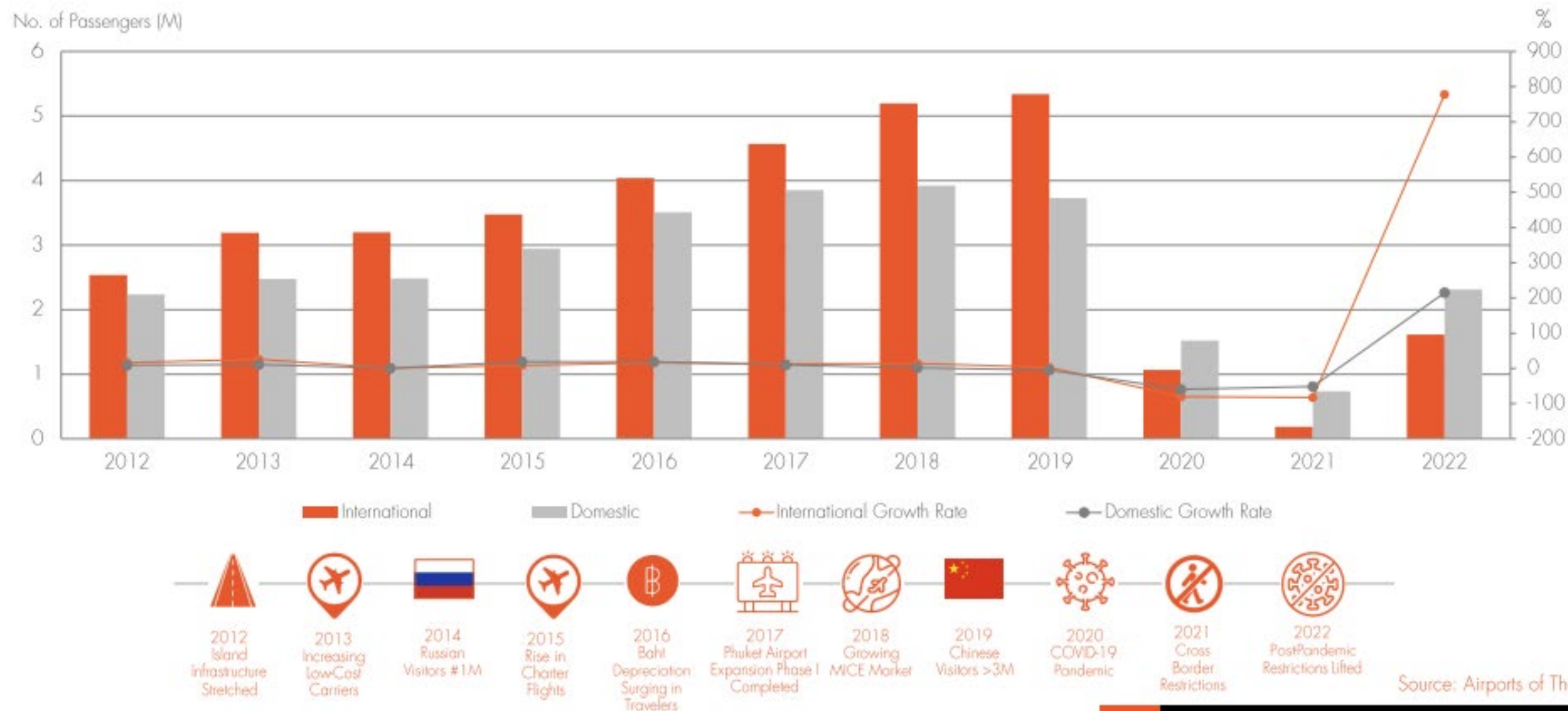


Source: Airports of Thailand *Data as of FY2022

TOURISM MARKET REVIEW

Tourism Indicators

10-Year Phuket International Airport Passenger Arrival Trend



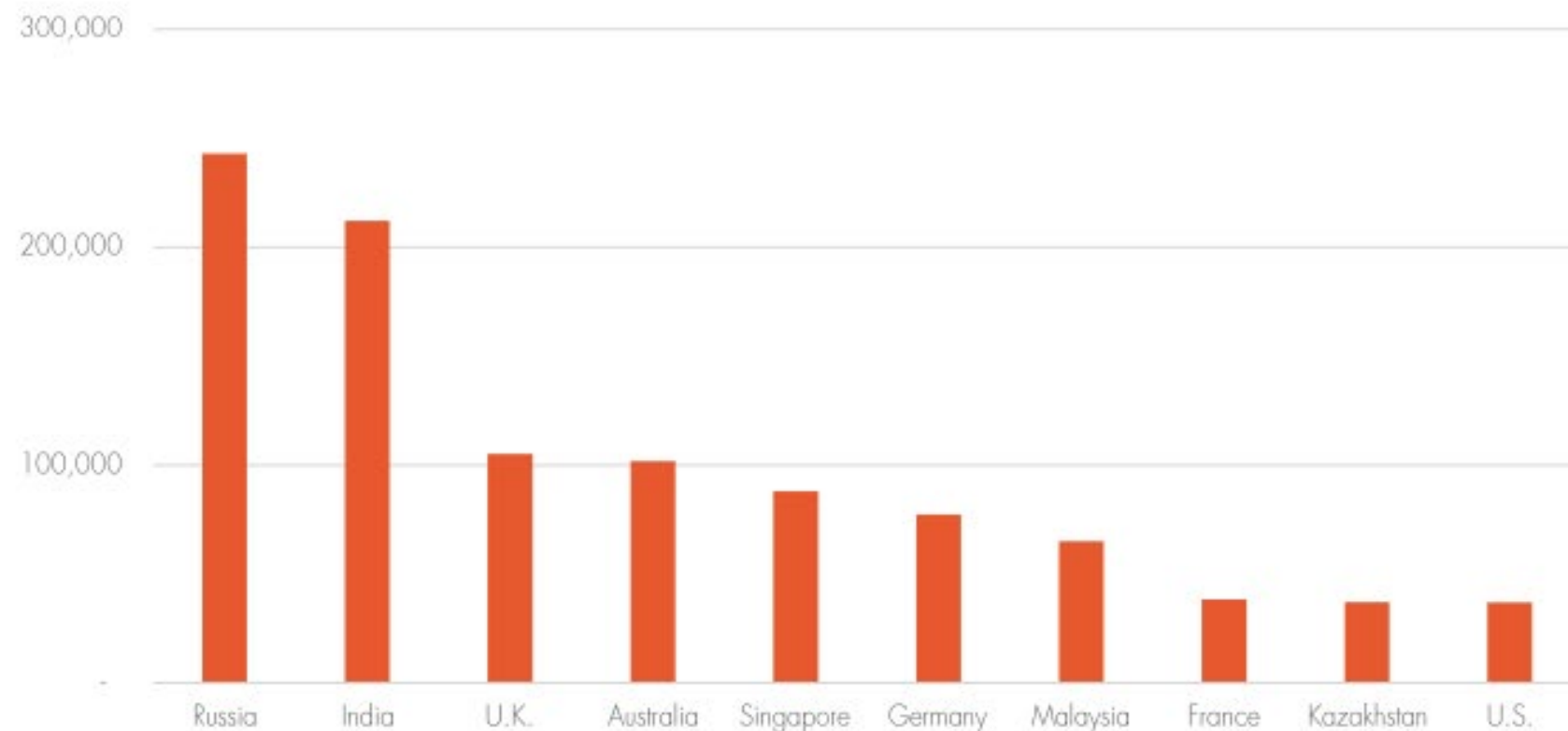
Source: Airports of Thailand

TOURISM MARKET REVIEW

Tourism Indicators

Top 10 International Source Markets – FY2022

No. of Visitors



Top Source Markets 2022

Winter: Russia

Summer: India

Source: Phuket Immigration Office
*Data as of FY2022

Tourism Indicators

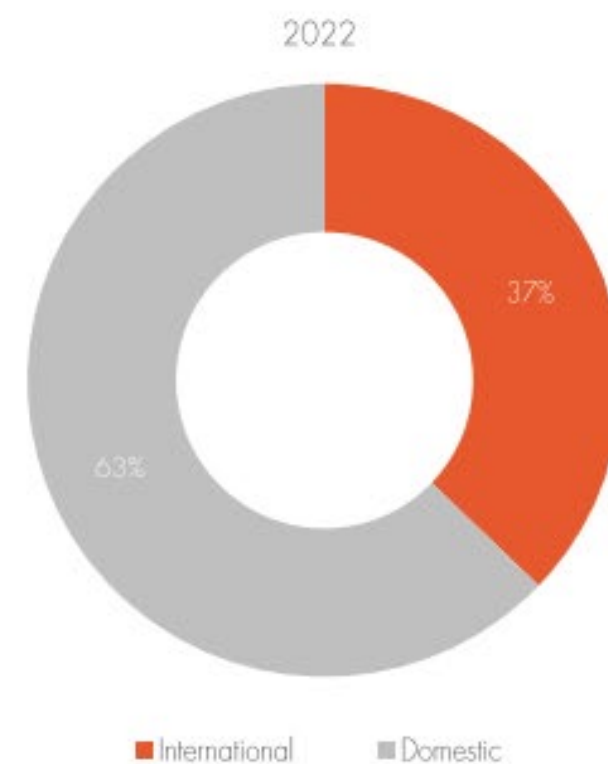
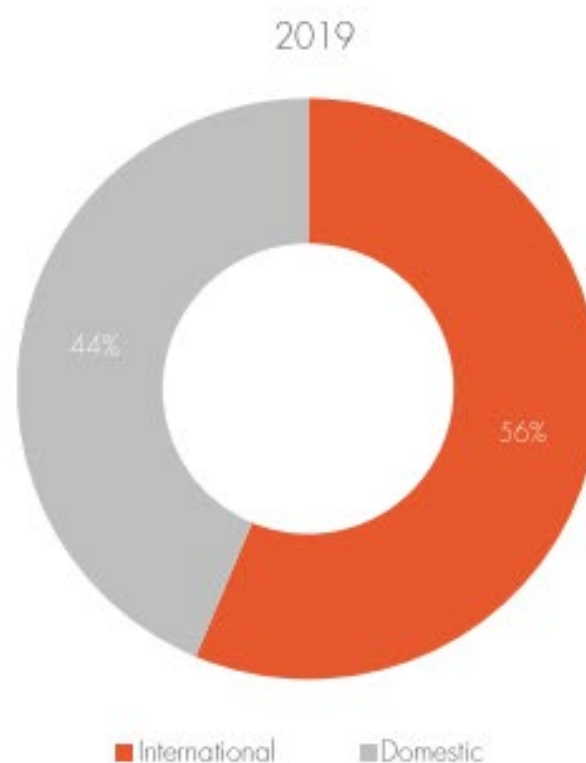
International and Domestic Flights – 2019 vs. 2022



International Flights

2019: 56%

2022: 37%

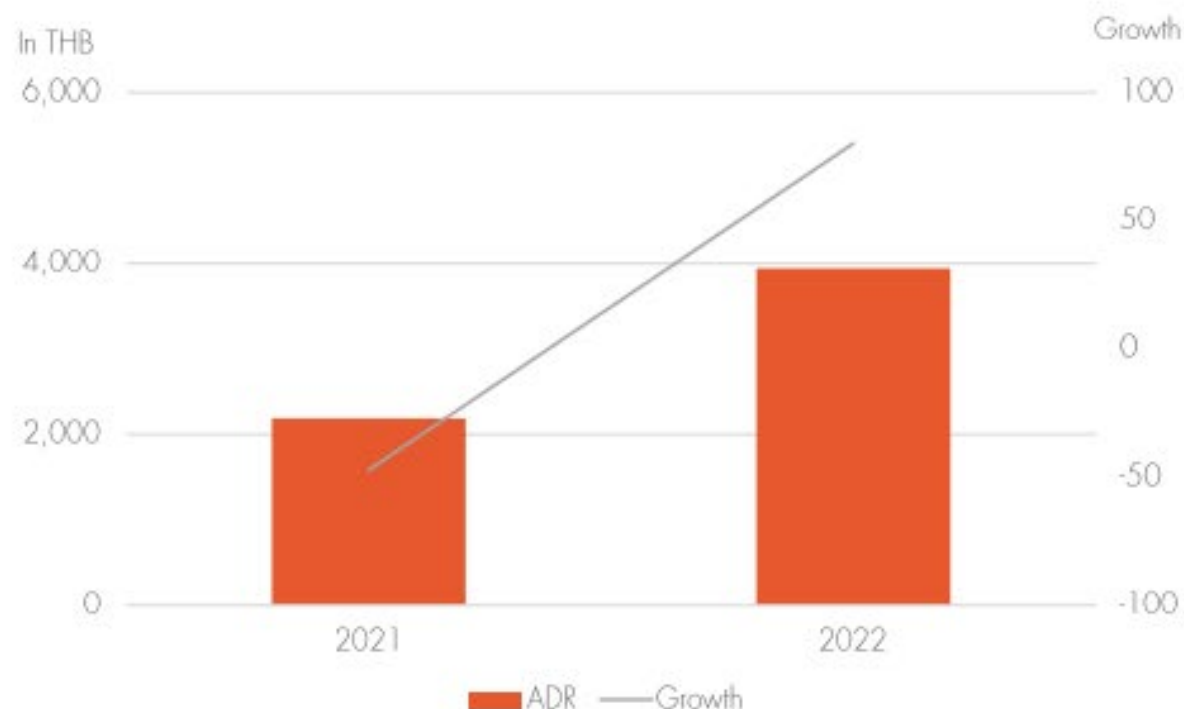


Source: Thailand Ministry of Tourism and Sports
*Data from FY2019 and FY2022

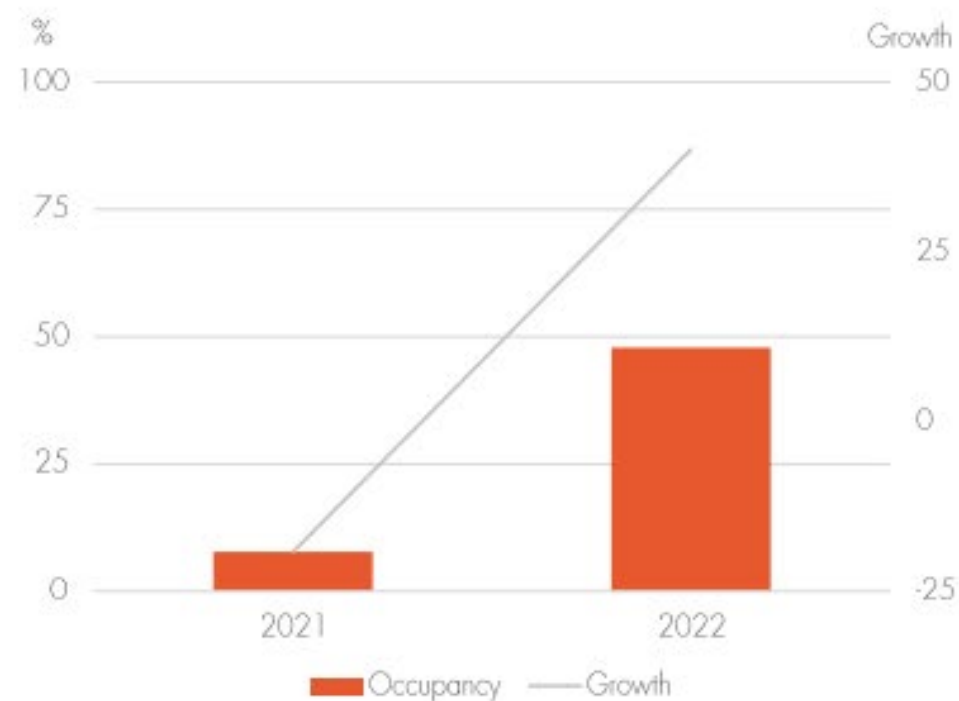
HOTEL MARKET REVIEW

Hotel Performance 2021 vs. 2022

Average Daily Rate



Occupancy



Source: STR and C9 Hotelworks Market Research
*Data as of FY2022

HOTEL MARKET REVIEW

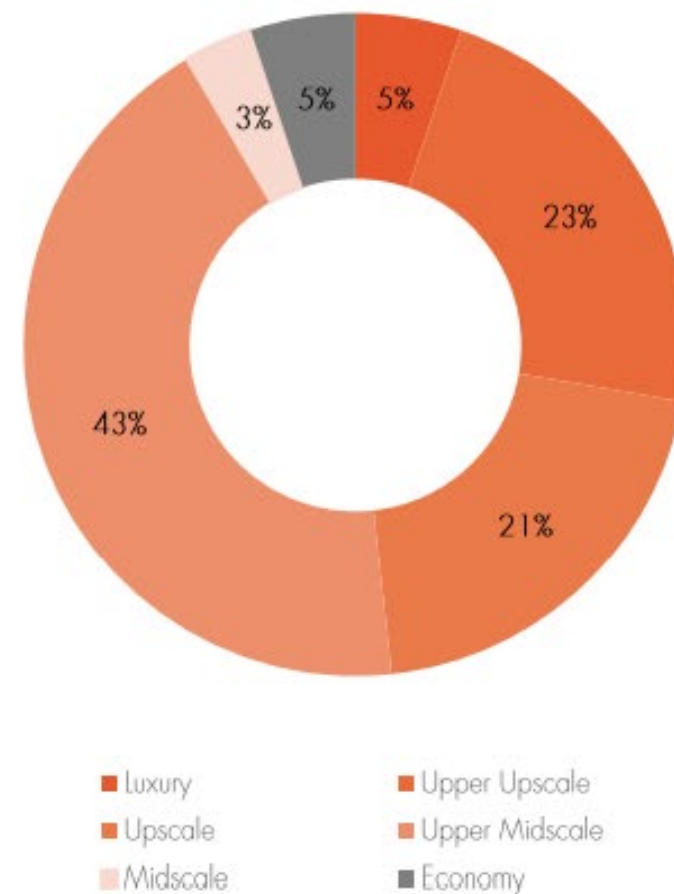
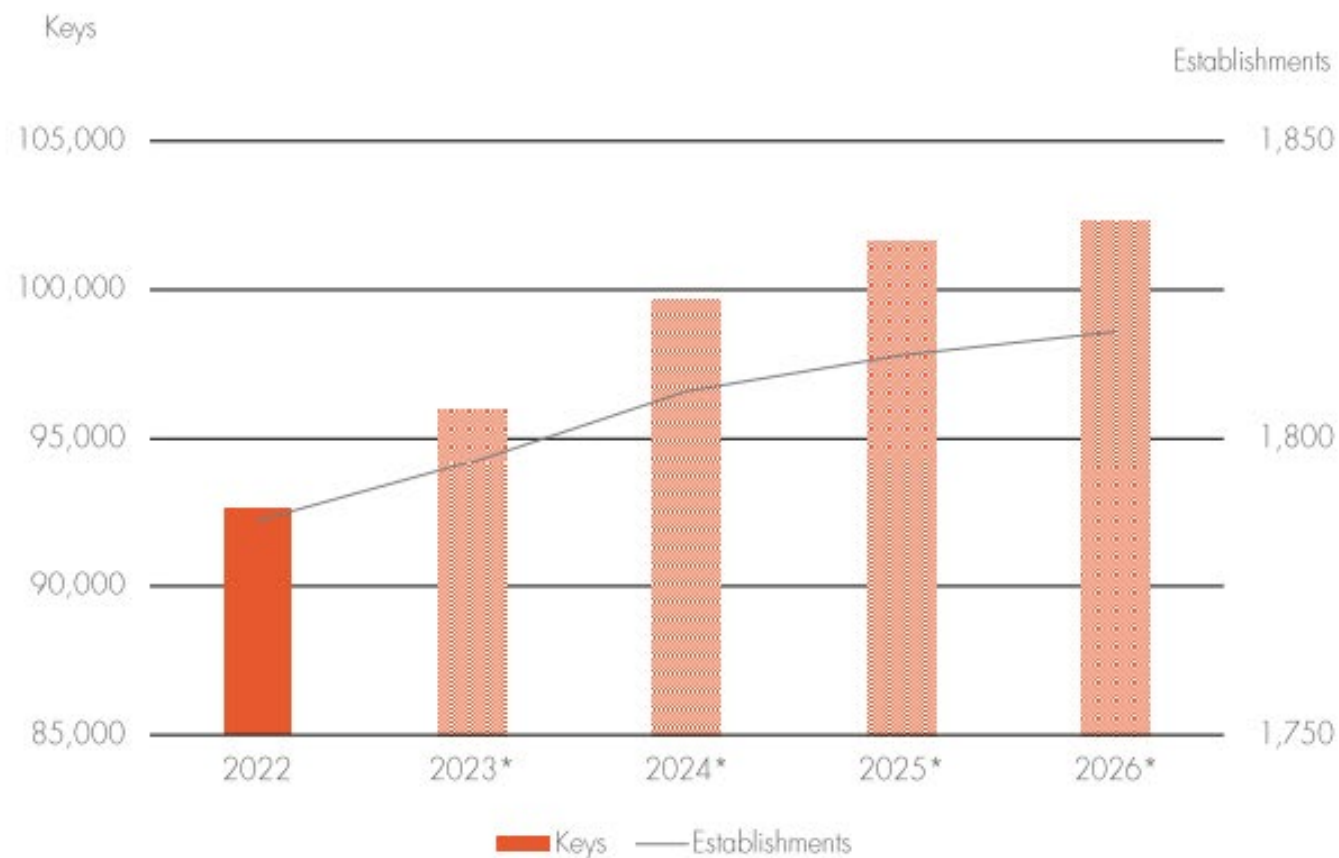
Room Night Demand – Jan 2019 to Dec 2022



Source: C9 Hotelworks Market Research
*Data as of FY2019 - FY2022

HOTEL MARKET REVIEW

Phuket Historical & Forecasted Hotel Supply



Source: C9 Hotelworks Market Research *Projected Data

HOTEL PIPELINE

Hotels	Location	Keys	Opening
Pullman Arcadia Karon Beach (rebranded)	Karon	662	Apr 2023
Nagai Mai Khao Resort	Mai Khao	244	Sept 2023
La Green Resort (Former Layan Green Park)	Layan	403	Sept 2023
HOMA Phuket Cherngtalay	Bangtao	423	Dec 2023
Holiday Inn Phuket Kata Beach	Kata	140	2024
Holiday Inn Express and Suites Kata Beach	Kata	135	2024
Holiday Inn Vana Nava Phuket	Kathu	255	2024
MGallery Hotel MontAzure Lakeside Phuket	Kamala	236	2024
Angsana Oceanview**	Bangtao	116	2024
NH Boat Lagoon Phuket Resort (rebranded)	Koh Keaw	271	2024
Radisson Phuket Mai Khao Beach	Mai Khao	222	2024
Courtyard by Marriott Phuket, Patong Beach	Patong	445	2024
Meliá Phuket Karon	Karon	214	2025
Movenpick Phuket Kamala Beach	Kamala	185	2025
Holiday Inn Express Phuket Kata	Kata	300	2025
Veranda Resort Phuket, Autograph Collection	Cape Panwa	154	2026
JW Marriott Phuket Resort & Spa Chalong Bay	Chalong Bay	189	2026
Courtyard by Marriott at Chalong Bay Phuket	Chalong Bay	277	2026
W Phuket Nai Harn Beach	Nai Harn	60	2026
Fairfield by Marriott Phuket City West	Phuket City	300	2032
Courtyard by Marriott Phuket City West	Phuket City	260	2032
Moxy Phuket Naiyang Beach	Naiyang	200	2032
The Mandarin Oriental, Phuket	Leam Singh Bay	105	TBA
Centra Central Phuket	Kathu	170	TBA
COSI Central Phuket	Kathu	180	TBA
Centra by Centara Maikhao Resort Phuket	Mai Khao	280	TBA
The Beach Plaza Phase 1	Kata	730	TBA
Tonino Lamborghini Boutique Hotel Phuket	Ao Por	51	TBA
Hilton Phuket Mai Khao	Mai Khao	258	TBA
Tribe Phuket Patong Avista	Patong	230	TBA
Sheraton Phuket Grand Bay Resort	Ao Por	270	TBA
Total		7,965	

**Additional Keys for Existing Hotel with Residences; Source: C9 Hotelworks Market Research

HOTEL PIPELINE

Hotel Residences with Mandatory Rental Program	Location	Keys	Opening
Platinum Bay Phuket	Kamala	432	Dec 2023
Oceana Surin - Hotel Zone	Surin	333	2024
Angsana Oceanview Residences**	Bangtao	33	2024
Patong Bay Hill 2	Patong	199	2025
Patong Bay Seaview Residence	Patong	454	2025
Dhawa Phuket Residences	Bangtao	175	TBA
Himalai Oceanfront Condominiums	Kamala	427	TBA
Grand Himalai Oceanfront Residences	Kamala	426	TBA
Patong Bay Oceanview Cottages	Patong	300	TBA
Patong Bay Residence Phase 3	Patong	114	TBA
Total		2,893	
Hotel Residences with Optional Rental Program	Location	Keys	Opening
Utopia Karon	Karon	238	Jun 2023
Utopia Mai Khao	Mai Khao	92	Aug 2023
The Marin Phuket	Kamala	260	Sept 2023
Wyndham La Vita, the VIP Mercury	Rawai	516	Dec 2023
Beachfront Bliss Naiyang	Nai Yang	96	Dec 2023
Laya Condominium and Resort	Layan	926	2024
Oceana Surin - Residential Zone	Surin	555	2024
Utopia Dream	Nai Harn	595	2025
VIP Galaxy Villas Rawai	Rawai	114	TBA
The Residences at Sheraton Phuket Grand Bay	Ao Por	107	TBA
Total		3,499	
Grand Total		14,357	

BILL BARNETT

MANAGING DIRECTOR



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PHUKET BREAKFAST BRIEFING

What does 2023 have in store for
Phuket's Hotel and Tourism industry



Bjorn Courage _____

President of Phuket Hotels Association and
General Manager at the InterContinental® Phuket Resort



PHUKET HOTELS ASSOCIATION BACKGROUND

- Non-profit organisation
- Formed in January 2016
- 81 hotel members
- Approximately 13,500 rooms
- Over 25,000 employees

Some of our key achievements:

- **PHAB (Phuket Hotels Association Benefit)** fundraising event have raised over THB10 million. PHAB to date offered 41 Thai students with hospitality scholarships
- **PHIST (Phuket Hotels for Islands Sustaining Tourism)** sustainability event, 20+ speakers, 1000+ delegates and 20+ exhibitors
- Phuket Hotels Association **Plastic Elimination Pledge**: 71 hotels agreed to remove single-use plastic. 51% plastic reduction and 4.4 million bottles / plastic straws saved in 2018.
- **Phuket Green Day** - annual island wide clean-ups attracting 1000+ volunteers around the island at 16 locations
- **Green Planet**, an Eco-Learning Hub, to support sustainability education for 5,000+ Thai children in Phuket



CORE PILLARS



DESTINATIONS MARKETING

Promote Phuket as a "Destination", sharing goodwill stories with key feeder markets.
www.phukethotelsassociation.com



EDUCATION

Focuses on community hospitality & tourism education by offering scholarships. Build human capital in the Hospitality & Tourism Sector



SUSTAINABILITY & ENVIRONMENTAL

Focuses on tourism sustainability initiatives for our hotel members and Phuket island, i.e. island clean-ups, etc



GOVERNMENT LIAISON

Focuses on influencing nationwide tourism policy makers and resolving local tourism issues that are critical to member hotels

WHAT HAPPENED IN PHUKET TOURISM IN 2019 – 2023



In 2019, 95% of Phuket's income was Tourism generated of which 89% was from foreign tourists.



In 2021, **tourist arrival numbers** dropped by 92% vs. 2019.



In 2022, **Phuket province had the highest tourism** earnings and the revenue moved closer to pre-pandemic level at 50%

Phuket welcomed tourists from January to December 2022 a total of **9.2 million tourists** with a breakdown of Domestic tourists accounting for 53.6% and International tourists at 46.4%.



WHAT HAPPENED IN PHUKET TOURISM IN 2021–2023 CONT.



The **average hotel room occupancy** rate was 43% in 2022, and January 2023's rate was 80%.

- The **visitors' rate is forecasted to increase** from 4.2 million in 2022 to 7.5 million in 2023.



- The **hotel revenue and business will recover** from 34.7 billion baht in 2022 to 60.3 billion baht in 2023.

- The **number of rooms in Phuket are increasing** from 106,000 in 2022 to 112,000 rooms in 2024, an increased of 15.3% vs. 2019



- April 2023 onwards, Phuket will see **markets return** from India, China, Regional Markets and Australia as well as Europe as of Q3
- One exception will be **Songkran week** in mid-April 2023 which is expected to be the **first major Songkran** with water activities.



CHINESE TOURISTS IN 2023

"China market is the #1 tourist market for Phuket, the island prepares for their return in 2023"



- The acceleration of Chinese tourists will begin in the Q2
- # flights increased from Feb to Mar 2023, the airfare connecting key cities and Thailand remains 1.5x times and 2nd-tier cities +200% vs. pre-covid
- Thailand forecast 5.0m Chinese visitors in 2023 or 50% compared to 2019
- Phuket aims to welcome approx. 1m Chinese in 2023 vs. approx. 3m in 2019

Flights from China to Phuket in February 2023

AIRLINE	Flight Frequency
SPRING AIRLINES	28 Flights/week
JUNEYAO AIRLINES	28 Flights/week
SICHUAN AIRLINES	14 Flights/week
SHANGHAI AIRLINES	8 Flights/week
HAINAN AIRLINES	10 Flights/week
AIR CHINA	6 Flights/week
CHINA EASTERN AIRLINES	6 Flights/week

Flights from China to Phuket in March 2023

AIRLINE	Flight Frequency
SPRING AIRLINES	28 Flights/week
JUNEYAO AIRLINES	40 Flights/week
SICHUAN AIRLINES	14 Flights/week
SHANGHAI AIRLINES	14 Flights/week
HAINAN AIRLINES	14 Flights/week
AIR CHINA	20 Flights/week
CHINA EASTERN AIRLINES	10 Flights/week
NINE AIR	6 Flights/week
CHINA SOUTHERN	12 Flights/week
CHINA WEST AIR	10 Flights/week
SHENZHEN AIRLINES	6 Flights/week

RUSSIAN TOURISTS IN 2023

Russians were the top nationality in Phuket in 2022 and first month of 2023

- The number of Russian tourist arrivals in Phuket International Airport in January 2023 was approximately 105,741 persons.
- In 2019, Russia made up the second source market for Phuket tourism after China market.
- Since Thailand fully reopened in 2022, Russian arrivals have made up the largest group of visitors
- They have tend to stay longer, travelling 12-15 days on average and some of them decided to stay long term for 3 months - 1 year
- Currently, over 7,000 Russians seek to extend Phuket stay and mostly in Rawai and Chalong

INDIAN TOURISTS IN 2023

Indians were the second top nationality in Phuket in 2022 and first month of 2023

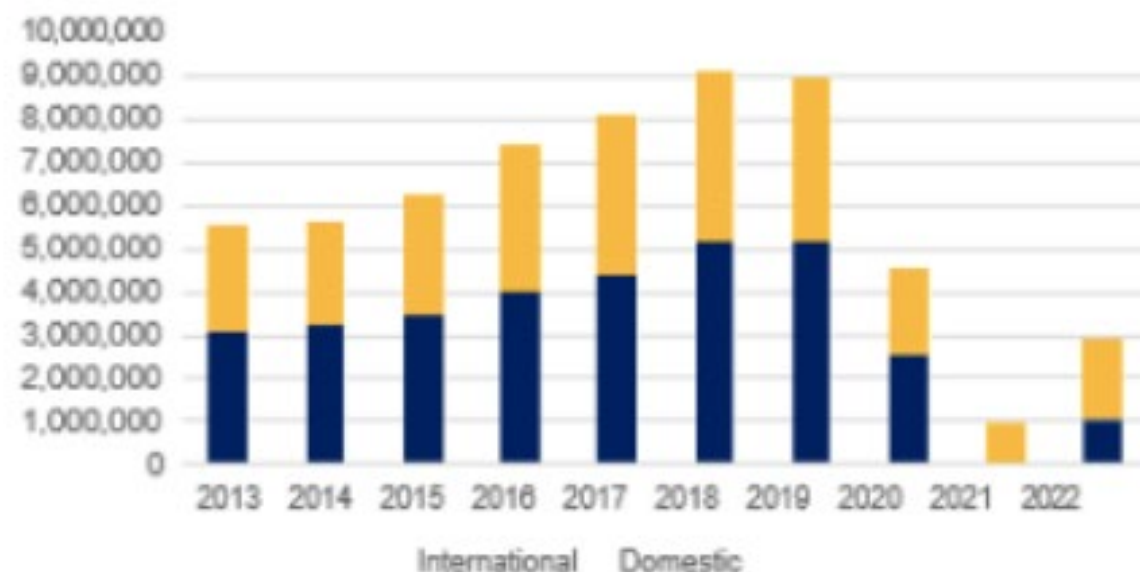
- The number of Indian tourists arrivals in Phuket international Airport in January 2023 was approximately 24,150 persons.
- Indians lead the way to Phuket tourism recovery with the largest number of arrivals since Thailand ended Test&Go in May 2022
- Since Russia arrived in November 2022 India became the second-largest tourist market for Phuket in 2022 and continuing in 2023



MARKET UPDATE

PHUKET THAILAND

Phuket Airport Arrivals



Phuket Airport Arrivals

Pre-pandemic:

- In 2014 Phuket grew airport arrivals despite int'l decline arrivals due to BKK political protests
- Since 2015 the market saw 4 years of double-digit growth due to international terminal opening in 2016 and completion of domestic terminal upgrade in 2018.
- 2019 arrivals declined due to July 2018 boat incident, China-US tension, and THB appreciating

During the pandemic (2020 and 2021)

- Border closures and restrictions negative impact on travel.
- Phuket was the first destination to welcome international travellers under "Phuket Sandbox".
- As a result, around 40,000 international passenger arrivals were recorded in 2021.

Post Pandemic:

- Early 2022 "Test & Go Scheme" and July onwards almost all entry requirements were lifted
- Passenger arrivals rebounded to around 2.9 million, especially in the second half of 2022
- The top 5 foreign markets in 2022 were Russia, India, Australia, UK and Singapore.

MARKET UPDATE

PHUKET THAILAND

Pre-Pandemic	2017	2018	2019
Primary Set – Upper Midscale			
Occupancy	81%	78%	79%
ADR (THB) *	4,611	4,932	4,469
RevPAR (THB)	3,740	3,855	3,543

Pre-Pandemic	2017	2018	2019
Secondary Set – Luxury			
Occupancy	71%	71%	68%
ADR (THB) *	8,337	8,650	8,289
RevPAR (THB)	5,879	6,151	5,659

*Net rate, excluding service charge, tax, and breakfast allocation

Pre Pandemic

- Despite Chinese demand decrease post 2018 boat accident ; 2017-2019 were strong for resorts
- In terms of ADR, 2018 was best year for both sets, showing y-o-y growth of 7% and 4%
- The decline in market ADR in 2019 was due to (1) the strong Thai Baht (2) US-China trade war and (3) the conservative post boat incident rate strategy

Pandemic and Post-Pandemic	2020**	2021	2022
Primary Set			
Occupancy	28%	24%	58%
ADR (THB)*	4,927	3,038	4,897
RevPAR (THB)	1,267	744	2,843

Pandemic and Post-Pandemic	2020	2021	2022
Secondary Set			
Occupancy	28%	36%	58%
ADR (THB) *	7,459	4,282	8,416
RevPAR (THB)	2,107	1,542	4,912

*Net rate, excluding service charge, tax, and breakfast allocation

** Occupancy is based on total inventory unless hotels are closed for renovation.

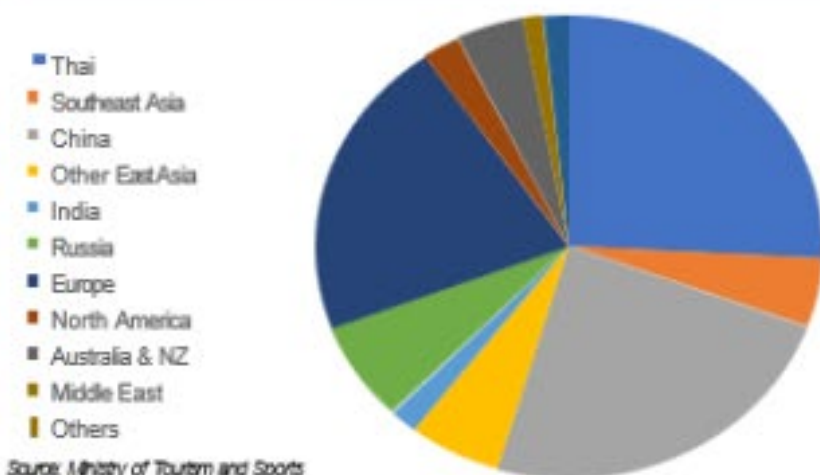
During and Post Pandemic

- Q1 2020 was a strong start for most resorts
- In 2021 both Occ and ADR dropped due to closed borders and Delta variant outbreak
- July 2021' Phuket Sandbox launched and "We Travel Together" Stimulus Campaign
- In terms of RevPAR recovery, the primary market recovered 80% vs 87% secondary market due to stronger rate performance.

MARKET UPDATE

PHUKET THAILAND

Phuket Nationality Mix (2019)



Source: Ministry of Tourism and Sports

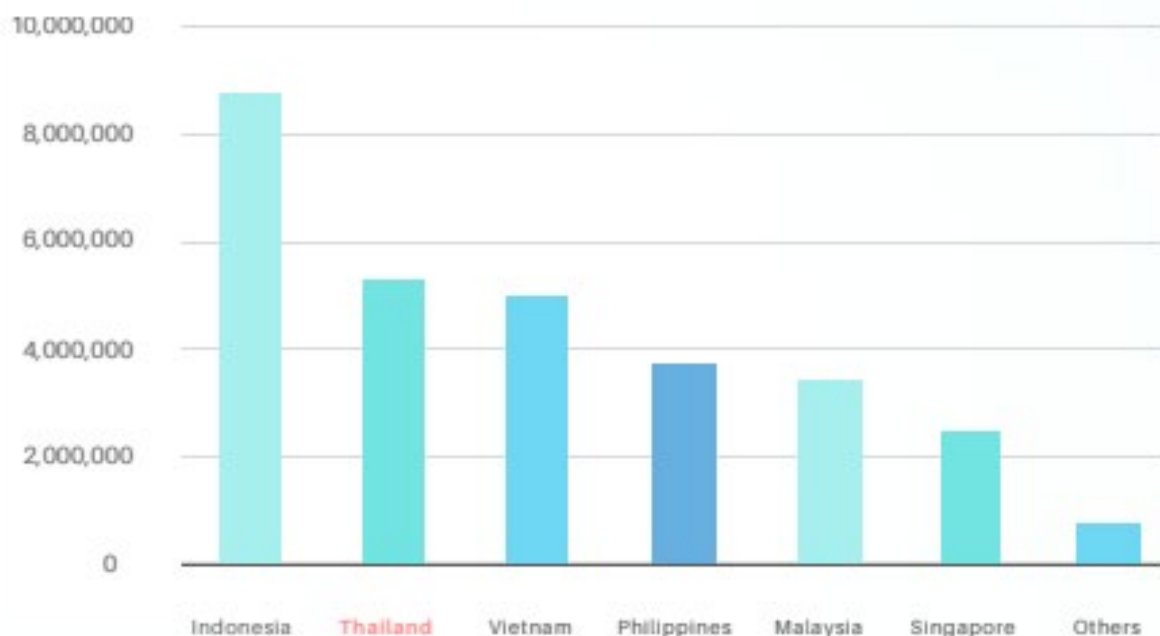
Based on arrival recorded between 2013 and 2019, the main observations are;

- **China** recorded fastest growth and remained the single largest and dominant overseas source market.
- Other major Asian markets such as **Japan and Korea** were much smaller growth and contribution
- **India** had grown strongly. It is worth noting that India has emerged as a fast growing outbound market.
- **Major European** source markets had grown steadily. However, UK had shown signs of stagnation.
- **Australia and Malaysia** saw a decline of demand, due to other regional destinations such as Bali.
- **New Zealand + Spain** dropped out of top 10 source markets, replaced by **France + India**.

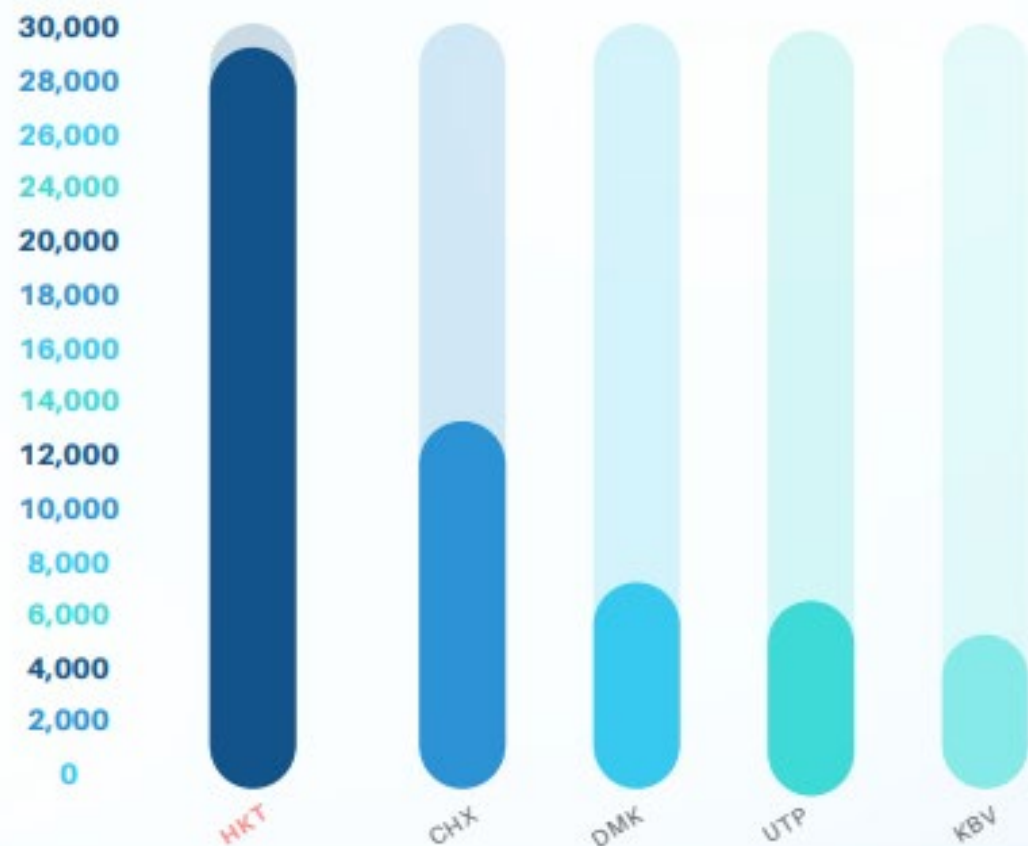
2013				2019				CAAG (2013 - 2019)
Rank	Source Market	Arrivals	% of Total	Rank	Source Market	Arrivals	% of Total	
1	China	1,139,273	15%	1	China	3,118,901	32%	18%
2	Russia	715,877	9%	2	Russia	909,281	9%	4%
3	Australia	576,496	7%	3	Germany	638,809	7%	6%
4	Germany	449,452	6%	4	Australia	482,320	5%	-3%
5	United Kingdom	308,085	4%	5	United Kingdom	337,891	3%	2%
6	New Zealand	292,696	4%	6	France	298,504	3%	7%
7	Malaysia	273,270	4%	7	Korea	284,429	3%	2%
8	Korea	253,109	3%	8	Malaysia	271,857	3%	-0.1%
9	Japan	235,717	3%	9	Japan	267,320	3%	2%
10	Spain	225,691	3%	10	India	225,535	2%	8%
	Others	3,247,121	42%		Others	2,843,951	29%	-

SOUTHEAST ASIA AVIATION

Total Seats by Country - February 2023



Top 5 Fastest Growing Airports by International Seats February 2023



MARKET UPDATE

PHUKET THAILAND

New Developments/Demand Generators

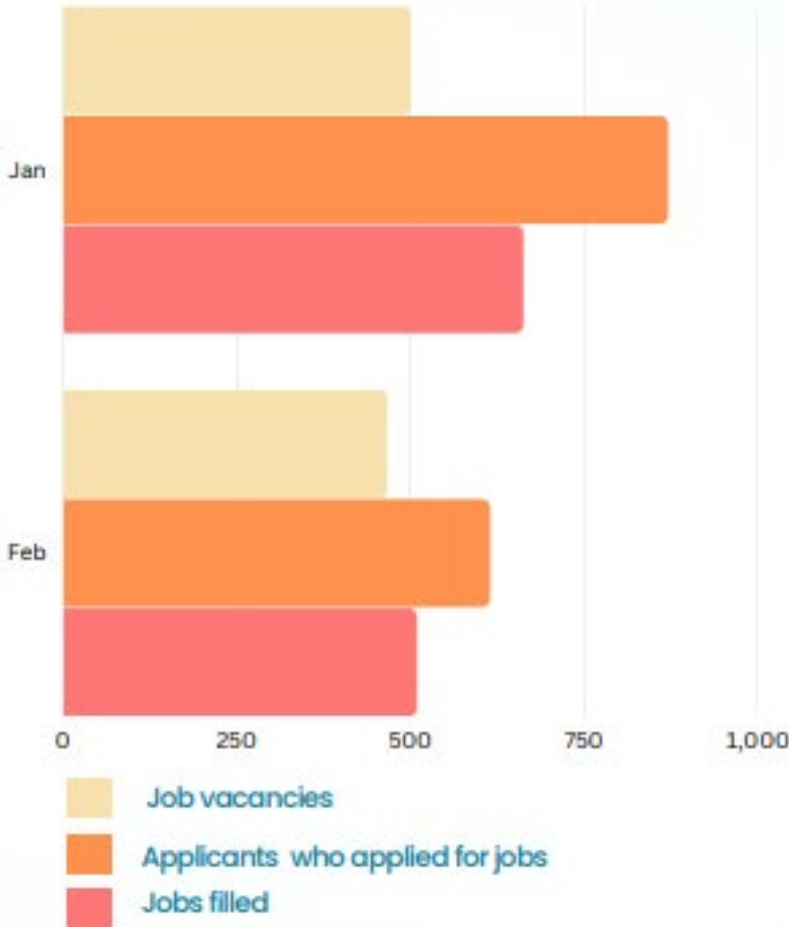
- **Andamanda Phuket:**
- An integrated resort development that comprises three components: 1) the island's largest water park, 2) a 300-room hotel targeting millennial travellers and families; and 3) a lifestyle retail mall which features F&B outlets and a world-class fountain masterpiece and water show. The water park just soft opened in May 2022. The hotel and mall are under construction and targeted to be completed by 2024.
- **Renovation of Jungceylon:**
- After 15 years in operation, one of Phuket's largest malls will undergo major renovation works throughout the entire complex from 2022 to 2023 and be transformed into the Oasis of Patong, a 'Tropical Resort Mall'.
- **International Medical Hub:**
- The Thai cabinet approved a project to build an international medical hub in northern Phuket (Mai Khao) in October 2022, with an estimated cost of about five billion Baht, with a timeline for completion by 2028.

Infrastructure Developments

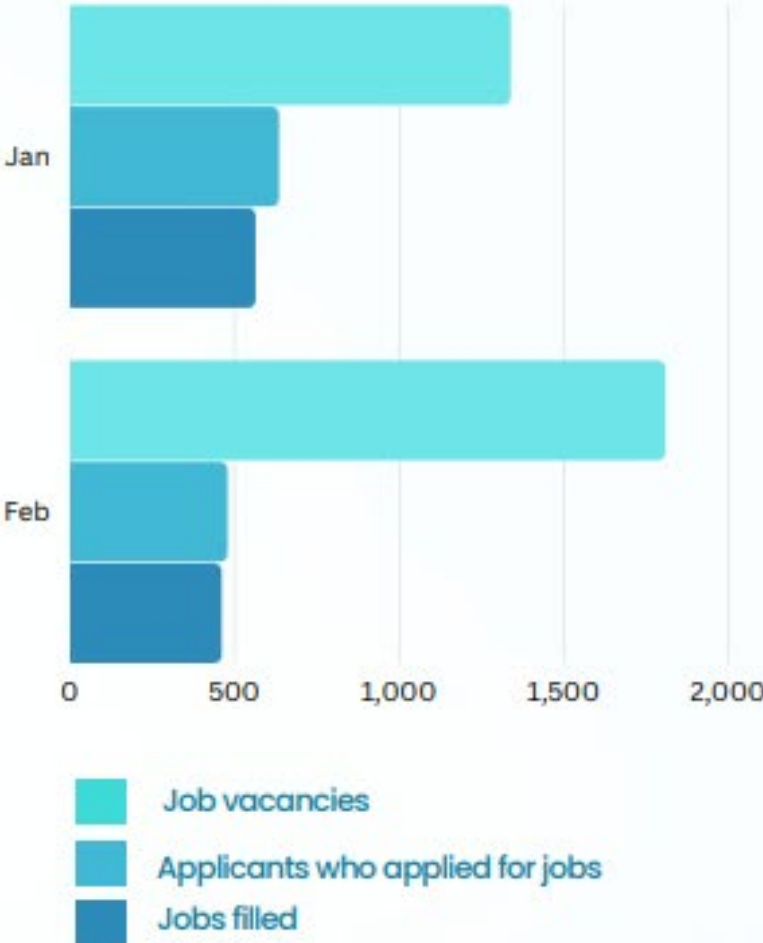
- **Phuket Airport Expansion:**
- Having 17.85 million passenger movements in 2019, the Phuket International Airport overran its capacity (12.5 million) by 43 percent. To cope with rapidly rising demand, the airport authority is working on improving current facilities of the existing airport to increase the capacity to 18 million per year (Phase 2 of Phuket Airport's Master Plan). However, the completion will be delayed from the original timeline to 2027.
- **Potential Phang Nga – Andaman International Airport:**
- In 2018, Airports of Thailand's board approved plans to develop a new airport in Phang Nga to serve Phuket and the vicinities. Targeted for completion by 2030, the airport is expected to boost tourism in the 'Andaman Triangle'
- **Patong Tunnel:**
- After all the delays, a 3.98-kilometer tunnel/expressway that connects Kathu district with Patong Beach has been approved with a budget of THB 14.7 billion. The project will start in December 2023 and be completed by end of 2027.
- **Mass Transit System:**
- According to the latest update in September 2022, the mass transit system first phase would be a 42 kilometer-long line running from the Phuket International Airport to Chalong Intersection, with 21 stations along the route. It is expected to be ready for service in 2026 which would be in time to support Phuket's bid to host Expo 2028.

LABOR SHORTAGE IN PHUKET – ALL INDUSTRIES

Labor Demand, applications and employment of Phuket in January - February 2020



Labor Demand, applications and employment of Phuket in January - February 2023



Source : Phuket Provincial employment office

PHUKET
HOTELS
ASSOCIATION

THANK YOU

Bjorn Courage

President at Phuket Hotels Association and
General Manager at the InterContinental® Phuket Resort



Phuket Breakfast Briefing

Looking Forward: What Does 2023 Have in Store for Phuket's Hotel and Tourism Industry



HUGHES
KRUPICA



Desmond R L Hughes FCI Arb, Senior
Partner/Co-Founder, Hughes Krupica

Key 2023 Hotel and Tourism – Legal and Commercial Points

Overview:

- Hot Market leads to more benefits, easing on loans/asset warehouse pressure
- Acquisitions stepping up now that ‘can I get a discount’ approach is no longer a factor
- Global Trends – JLL Report November 2022 – investors opt for upgrades over new builds, new supply limited in Q4 2022; Expectations for China outbound
- Krungsri Bank – Hotel Industry Outlook 2022-2024 – caution on occupancy – stating average below previous highs of 70%
- More energy in the market = more potential disputes. Early resolution preferred to wasting resource.
- Optimising Risk Management and Value – High Level High Quality Due Diligence for Buyers/Investors and High Quality Compliance/Internal Governance for Sellers

THANK YOU



www.hugheskrupica.com



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HUGHES
KRUPICA

Back to the Future

PHUKET HOTELS AND TOURISM SUSTAINABILITY IN 2023

WHY SUSTAINABILITY?

- Environmental Case
 - “Blackwater” on the beaches
 - Algae blooms in the bays
 - Plastic trash killing sea life
 - Air pollution
 - Ground Water pollution
 - Fresh Water supply issues
 - Global warming



WHY SUSTAINABILITY?

- Business Case
 - Utilities expense is typically the 2nd highest expense category for Hotels
 - Savings equals profit
 - ROI
 - Guests booking demand
 - Recognition on search engines
 - Keep Phuket a desired destination
 - Meet Corporate ESG goals



HIGHEST OCEAN PLASTIC WASTE POLLUTERS

Annual Estimation In Metric Tons

Graphic: Louis Lugas

Source: More than 1000 rivers account for 80% of global riverine plastic emissions into the ocean, Lourens J.J. Meijer et al (2021) via science .org



BOOKING.COM SUSTAINABLE TRAVEL REPORT 2022



78% of Global travelers intend to stay in a sustainable property at least once in 2023



71% of travelers want to make more effort in the next year to travel more sustainably



38% actively look for information about the sustainability efforts of a property before they book

ACCENTURE RESEARCH

Recent Accenture research has found that 83% of 25- to 34-year-olds are willing to pay more for sustainable travel options.

And the return on investment for hotel decarbonization could be substantial, relatively quickly—one study found that such investments could yield internal returns of 38% after five years.

GREENWASHING

the act of making a service, product, activity,
etc. appear to be more environmentally
friendly without actually making it
environmentally friendly



STANDARDS

LEED – Leadership
in Energy and
Environmental
Design

EDGE – Excellence
in Design for
Greater Efficiencies

TREES – Thai's
Rating of Energy
and Environmental
Sustainability

Earthcheck

Green Globe

Booking.com –
Travel Sustainable –
LEED and EDGE qualify for
Certified

And many more

STANDARDS

	LEED	TREES	EDGE	Earthcheck	Green Globe	Booking.com
System Focus	Focused Primarily on the Building			Performance	Performance	Certification
Credit Categories	Location & Transportation	Building Management	Energy	Energy	Sustainable Management	Energy Efficiency
	Sustainable Sites	Site & Landscape	Water	Water Use	Social/Economic	Building Standards
	Water Efficiency	Water Conservation	Materials	Carbon Emissions	Cultural Heritage	Waste Management
	Energy & Atmosphere	Energy & Atmosphere		Chemicals	Environmental	
	Materials & Resources	Materials & Resources		Movement		
	Indoor Environmental Quality	Indoor Environmental Quality		Community and employee impact		
	Innovation	Environmental Protection		Paper Use		
	Regional Priority	Green Innovation		Waste		
	NC & EB	NC & EB	NC & EB	Innovation		

THE FUTURE OF HOTELS AND TOURISM



Guests selecting travel options
based on sustainability

THE FUTURE OF HOTELS AND TOURISM

- Net Zero Carbon in Operation
- Set a target - What year?
 1. Set a baseline and gather data
 2. Determine steps to take - Model the building, Implement improvements
 3. Assess the results
 4. Repeat until target reached (Start at step 1 again)

Carbon calculator spreadsheet:

- <https://sustainablehospitalityalliance.org/resource/hotel-carbon-measurement-initiative/>

THANK YOU!

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