

ULI Fall Meeting 2015

Resorts Reimagined: From Urban to Destination

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HOSPITALITY TRENDS **RESORTS REIMAGINED**

VALUES ARE SHIFTING

a collective shift in consumer values and behavior began several years ago when trends in **authenticity, sustainability** and **streamlining** started to emerge.

the recent economic downturn fueled a new awareness and accelerated these shifts - strengthening trends in **exploration, interaction, experience, technology, well-being** and **value**.

the hospitality industry must address these new shifts

TREND 1 MILLENNIAL FOCUSED BRANDS

canopy
BY HILTON

AC
HOTELS
MARRIOTT

citizen
M
hotels

moxy
HOTELS

tommie

Radisson RED

aloft
A VISION OF W HOTELS

HYATT CENTRIC™

Virgin
HOTELS

For the first time, millennials, or generation Y are asserting themselves as an economic force. They're savvy and uncompromising. Most importantly, their unique point of view stems not so much from a refutation of old ideas but from an era with a new vocabulary.



DISCERNING DESIGN EYE

- Strong “Aesthetic Loyalty”
- Carefully Curated Persona
- Focus on Identity vs. Trends



REFINED LUXURY

- Seeking Authentic Experience
- Luxury is Personal and Intimate
- Values “Lifestyle” over Possessions

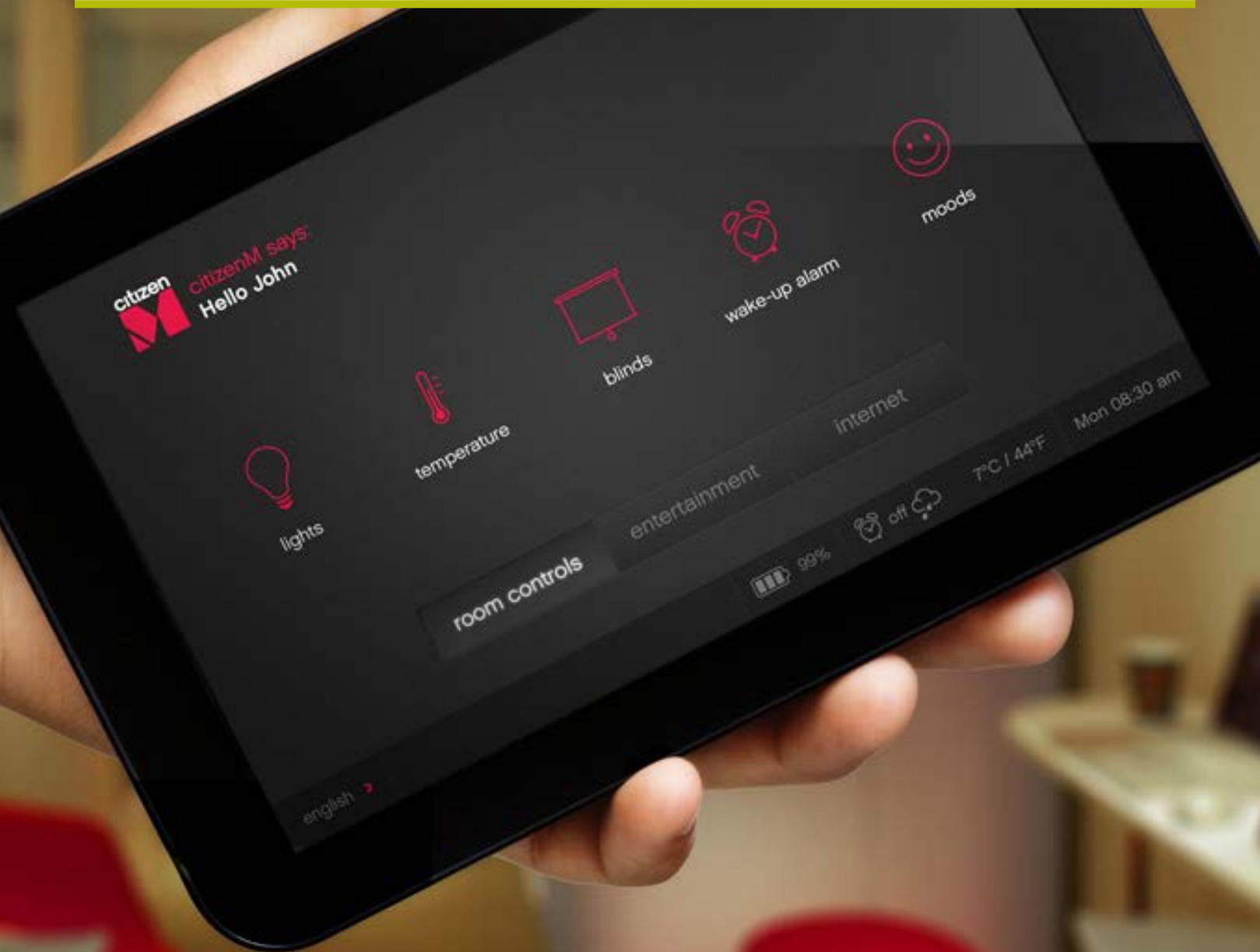


MINDFUL HEALTH & FITNESS

- Holistic and “Fun” Approach to Wellness
- Balance of Mind + Body + Spirit
- Values Substance over Diet Fads

TECH-SAVVY/TECH-DEPENDANT

- Expectation of Wired/Connected Resort
- Integrated Systems and Amenities
- Robust Tech supports Immersed Experience



SOCIAL CULTURE

- Perpetual Sharing: Photos, Events, Schedules
- Digitally Curated Social Life
- #bestresortever; #youhavetobehere



TREND 2 CROSS-OVER BRANDS



MAXIM

INTERSECT
BY LEXUS

nickelodeon™



BVLGARI
HOTEL & RESIDENCES

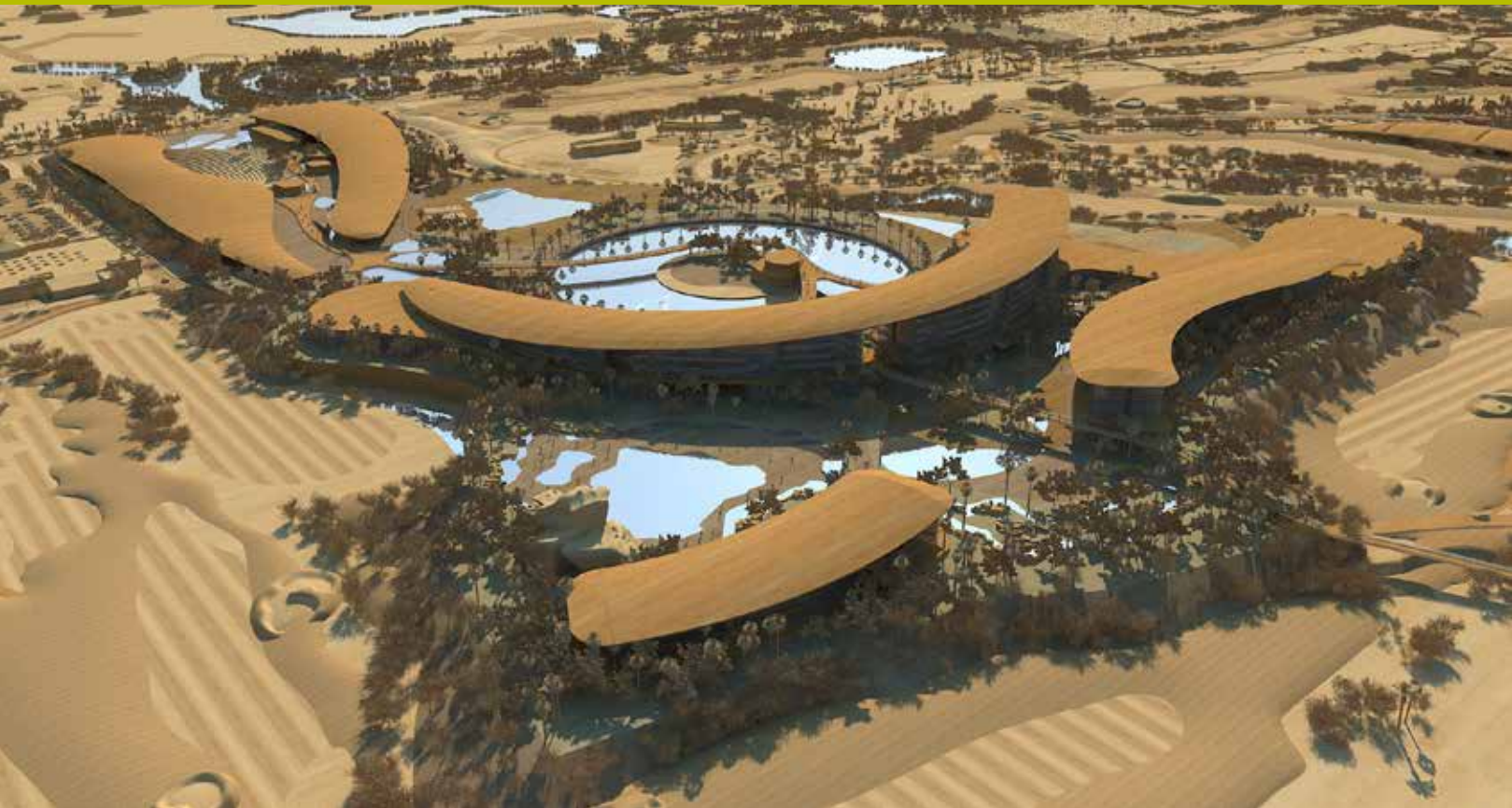


ARMANI
Hotel Dubai

“These hotels’ restaurants are geared to keep guests on the premises by integrating them into the properties’ overall experience ... instead of turning them loose, as most hotels do, to feast at local hotspots.”

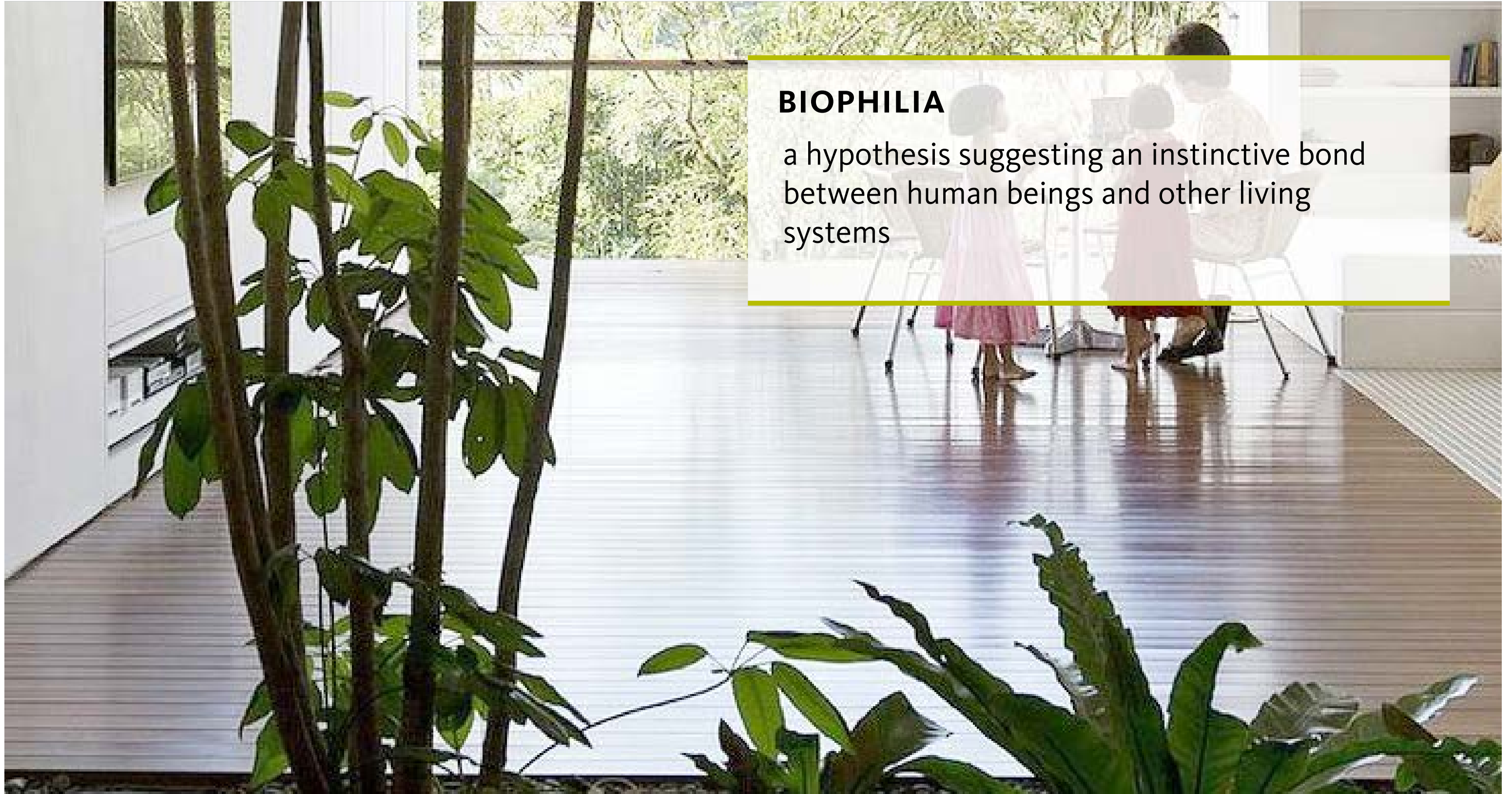
Source: Baum Whiteman





Quiksilver Palm Desert Resort | Palm Springs, CA

TREND **3** NEW SUSTAINABILITY



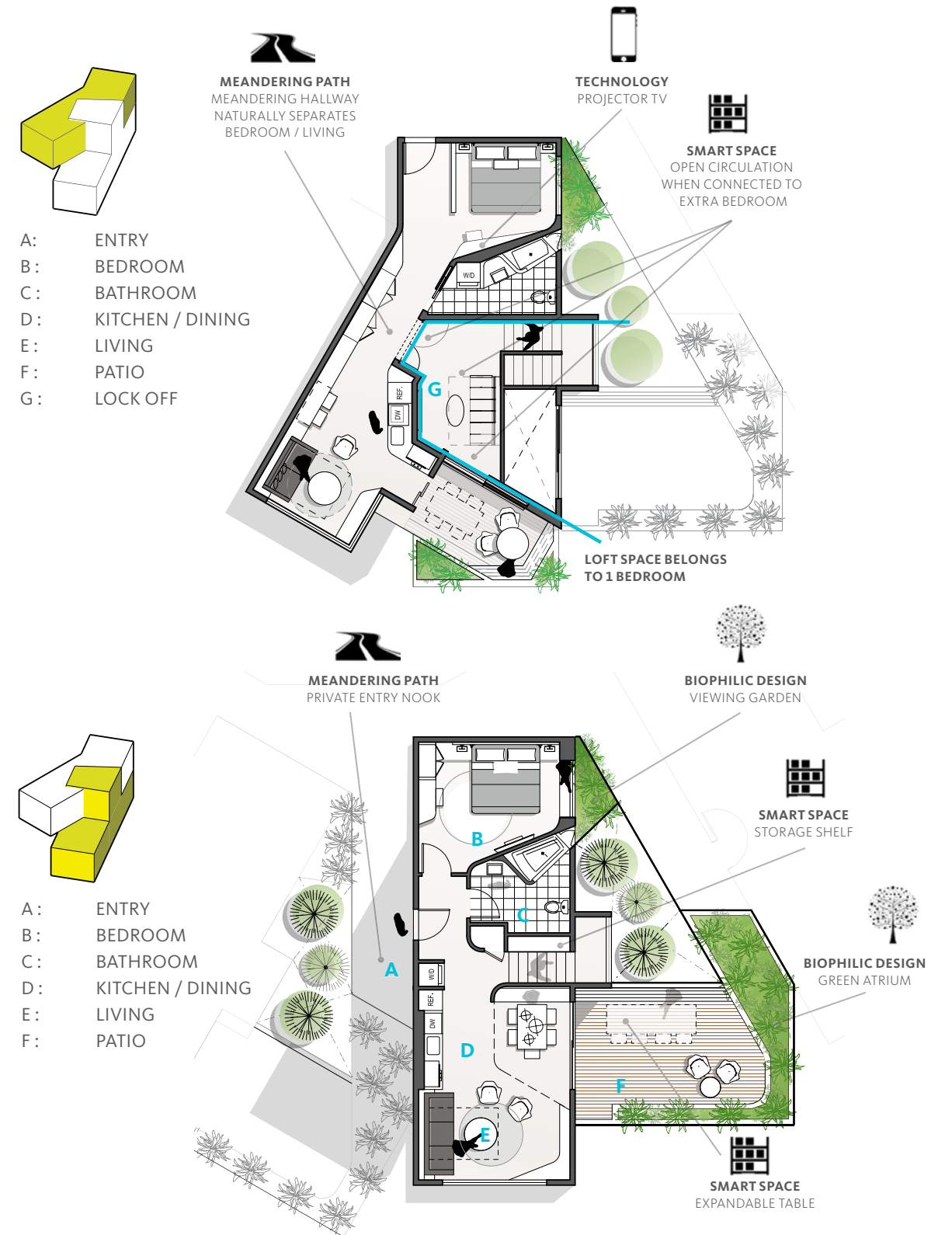
BIOPHILIA

a hypothesis suggesting an instinctive bond between human beings and other living systems

TREND 3 NEW SUSTAINABILITY



Next Gen Timeshare | Confidential Project



TREND 4 GLOBAL TRAVELER BOOM

53%

increase in travel for Indian travelers from 2010-2015.

73%

increase in travel for Chinese travelers from 2010-2015.

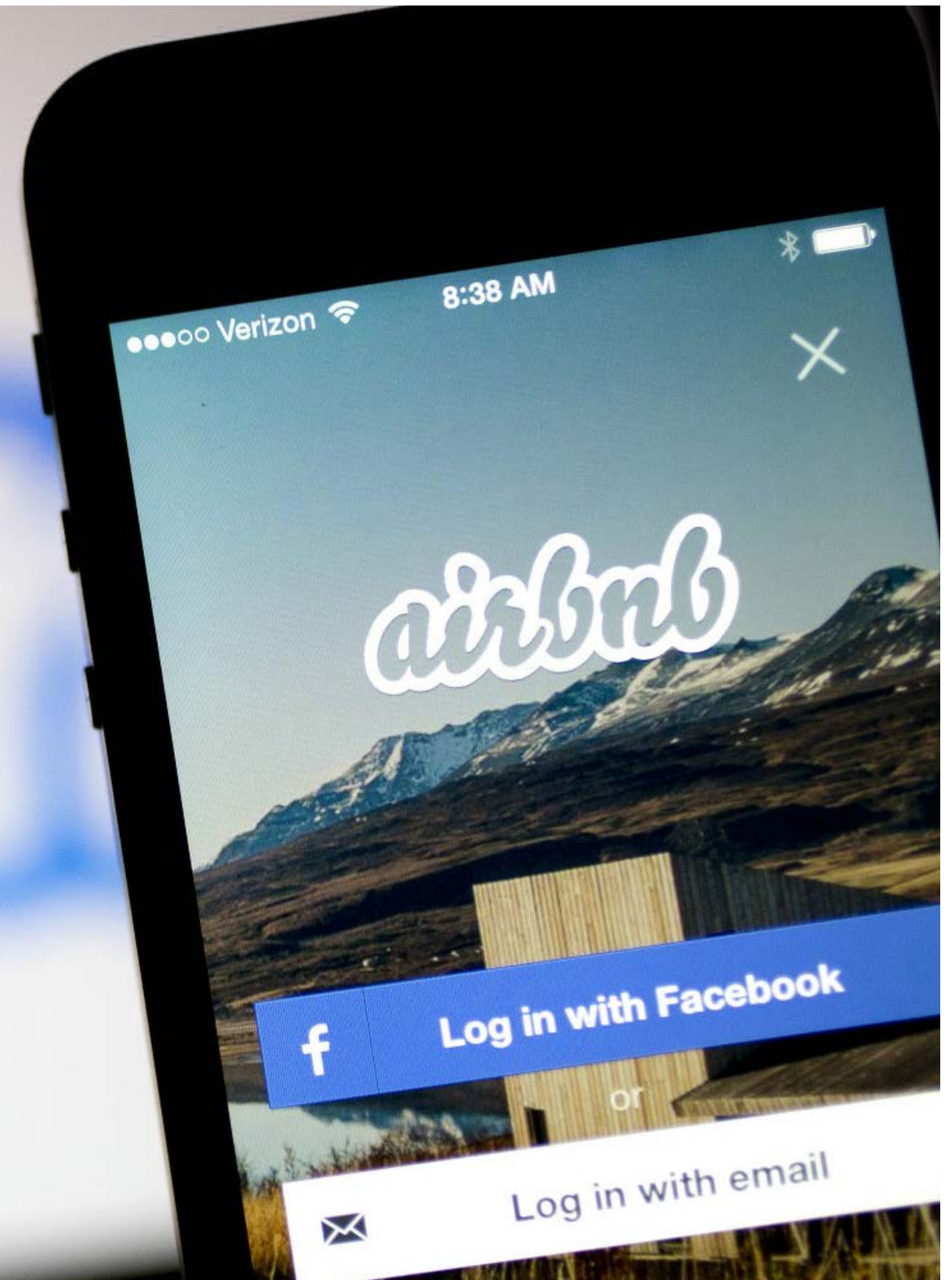
Source: Deloitte Hospitality 2015



TREND 5 DISRUPTOR

“Airbnb has more than 600,000 listings around the world including 600 castles, 1400 boats, and 300 tree houses. Airbnb’s current bookings are about 37 million room-nights per year, which is only around 20% of IHG’s 177 million last year.”

Source: Quartz



HOSPITALITY TRENDS **DESIGN PRINCIPLES**

- **MILLENIAL FOCUSED BRANDS**

- **CROSS-OVER BRANDS**

- **NEW SUSTAINABILITY**

- **GLOBAL TRAVELER BOOM**

- **DISRUPTORS**

CHANGING DEMOGRAPHICS COUPLED WITH **SHARED INTERESTS** CAN CREATE WIDESPREAD **MULTI-GENERATIONAL APPEAL**

FOCUS TOWARDS **EXPERIENTIAL DESIGN** OFFERING **AUTHENTIC** LIFESTYLE CHOICES AND **SENSE OF PLACE**

Thank You