



The beauty of our world is that it is constantly evolving and changing and creating new paths and new journeys for us - This is important to realise.

Nothing stays the same and re-evaluation is, and should be, a trait to be undertaken whether it be at a macro or micro level.

The rate of this re-evaluation depends on the factor of disruption applied. Some is slow, precise and considered, other is fast, quick and revolutionary. Both have their merits and both bring variety to our lives.



Over the last few years our technology parameters have all excelled and expanded well beyond what we may have thought originally possible.

It is to the dreamers in the technology industry that we must be grateful for expanding our horizons and knowledge.

With the emergence of ever increasing technology platforms we have come to experience the so-called **shared economy**. This economy has enabled people to collaborate over wider areas within more contextualised fields of interest and experience.



It is to this burgeoning economy that such peer-to-peer platforms as Uber, Lyft, Task-rabbit, Couchsurf, Overnight and of course Airbnb have seized the opportunities of an open market and created new ways of doing business, cleanly, cheaply and with great great efficiency.

The latter of these,



Airbnb has seen huge growth since its launch in 2008.

It defines itself as "a social website that connects people who have space to share with those who are looking for a place to stay"

It derives its revenues from guests and hosts and up to this moment has serviced

# 60,000,000

60,000,000 plus - yes - 60,000,000 plus guests across 191 countries and is ever expanding.

Airbnb have created a new marketplace which heretofore really did not exist,

and so within a relatively short space of time, a new player has entered the rental bedroom market and the Hotel industry have had no choice but to



lift their heads and take note.

So how does this impact the hotel industry.....



Well obviously when guests decide to stay in airbnb facilitated rentals this pulls customers from the hotel market be it budget or luxury - which loses revenue -

But not only do hotels lose the bedroom rate revenue but when guests choose not to stay in a hotel, the money they would have spent on food and beverages at the hotel's restaurant and bar is likely spent elsewhere. And so the hotel loses out on the revenue they otherwise would have received from that guest.



This then starts to precipitate itself across the other services and ancillary revenue streams typically used by a guest on his or her stay - spa facilities, business centre, late check out, early check in and so on...

At a fundamental level it is the leak of potential customers to these peer-to-peer platforms that is a disruption for our traditional hoteliers.

But not only that - the technology platforms for these companies mean that their relative operating costs are phenomenally small.



The Airbnb platform has near zero marginal cost, in that a new room can be incrementally added to (or removed from) the platform with negligible overhead. By contrast, increasing hotel room supply involves building, causing significant marginal costs for hotel chains.

The Airbnb CEO Brian Chesky is quoted on hearing that Marriott International, planned to add 30,000 rooms to its property portfolio in the coming year, defiantly boasted, "We will add that in the next 2 weeks." And so they did.

With such rates and ease of expansion



Airbnb may now be arguably called the largest Hotel chain in the world without owning a single piece of Hotel real estate.

When it comes to range of products, the likes of airbnb also trump the traditionals



users can rent anything from an apartment to a tree house to a yurt to a houseboat. And they are not prepared to just leave it at that...Airbnb now have a business offer to their service catering for corporate bookings with obvious pick up from a lot of the main tech giants around the world.

In constantly evolving its business model, It plans to roll out a slew of services to make staying at an Airbnb as comfortable as staying at a hotel, including cleaning services for its hosts. Airbnb has even tested an airport-transportation service. For Airbnb their business isn't just renting the house—their business is the entire trip,"

And this is the key to the success of the airbnb offer  
- 'the entire trip'



The offer appeals to the millennials as a generation of travellers seeking not just value but more importantly seeking experience and personality.

Hence the appeal of airbnb hosts - no one remembers the last receptionist to check them into the hotel but most remember their last airbnb host.

The criticism directed at the traditional hotels is :

'They don't understand the generation that has spawned [Airbnb], and they don't understand the technology that's driving it.'

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It is this technology that has enabled the experience to become more personal and more people focussed.



Hosts and their guests communicate before the booking, during the research phase, during the availability search, upon stay confirmation, before arrival – often offering concierge style advice, at check-in (often in person!), and even post check-out.

The host is the brand, and you have access to him at every stage of your travel experience. This is a huge reason why Airbnb has seen tremendous success.

What then do the traditionals look at in responding to this disruption in their market....



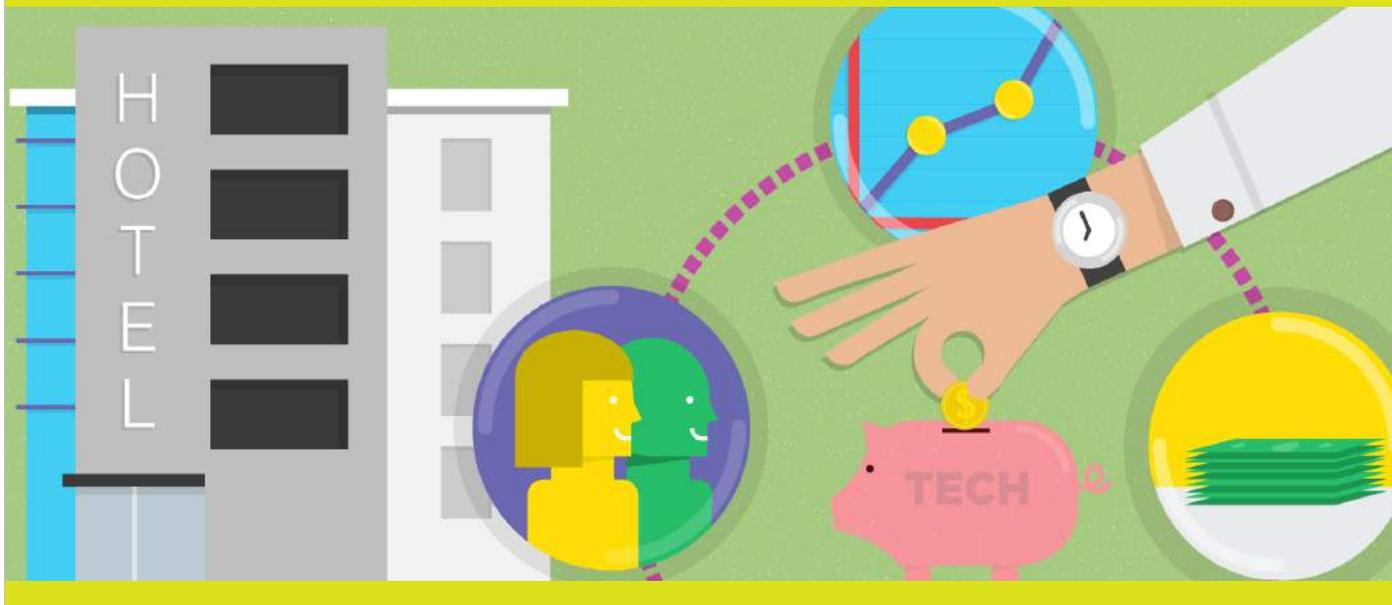
While the peer-to-peer lodging marketplace is certainly a value alternative when seeking lodging, hotels still provide better amenities, service and standards that are not matched by Airbnb - though Airbnb will seek to redress this. History has shown that consumers are more than willing to pay for a better experience. Whilst the traditional elements of hospitality are still where hotels can truly shine and offer service that Airbnb today lacks from its offering, hotels can still learn a tremendous amount from the giant technology unicorn. The problem is that the hospitality industry has been fairly staid and slow to adopt innovative technologies to improve the overall experience and operational execution.

In a mobile



and technology-driven world, consumers demand a customized, personal experience that they can also manage through their smartphones, tablets and computers.

Only a small percentage of hotels offer digital tools though this is changing. The gap can certainly close to enhance the guest experience, to remain competitive and continue to provide guests and staff an experience that will improve the hospitality experience.



The questions need to be asked as to how do we use the technology to better service guests, whether it's ordering room service, special pillows for their beds, getting something delivered by the pool, marketing to them, resolving their complaints before they've even left the hotel.

All of those things create a need for technology, which is much more significant than what we've had in the past. The importance is to give an experience so that when the guest leaves, they remember something about it.

In the not too distant future you should be able to use your smartphone to:



pick your room, arrange your check-in time, unlock the door, preset your room temperature, order extra pillows and blankets, gain access to the parking garage, stream music and video through the in-room TV, check menus at the hotel's restaurants and make reservations, order drink from the bar, book a spa treatment, reserve car service to the airport, and, eventually, check out.

My own opinion is that the progression of the hotel industry lies in the 2 D's:



## DATA & DESIGN

In the past, a hotel would know when a guest has booked and could track some behaviors while they are on site, but understood much less about that consumer's overall trip -- where they were traveling to next and how they would be getting there.

That is changing with the wide adoption of mobile and willingness of consumers to interact with travel brands in a growing number of ways



The Speed with which solutions providers are rushing to tap into the increasing amount of available consumer data, and evolving technology means that marketers will approach an all-encompassing view into customer behaviour and preferences.

Mobile messaging is enjoying a larger role as part of a brand's communication stack, and hotels have made greater investments in this area.



This means more data from a wider range of sources and steps in their path to travel, allowing for personalized messaging on a grand scale.

Consumers are sharing more information than ever, and while brands must be careful not to overstep with respect to consumer privacy, those that strike the right balance have a far more robust understanding of the traveler. With this comprehensive view into the traveler's journey, the industry is poised to elevate and personalize the travel experience further than ever.

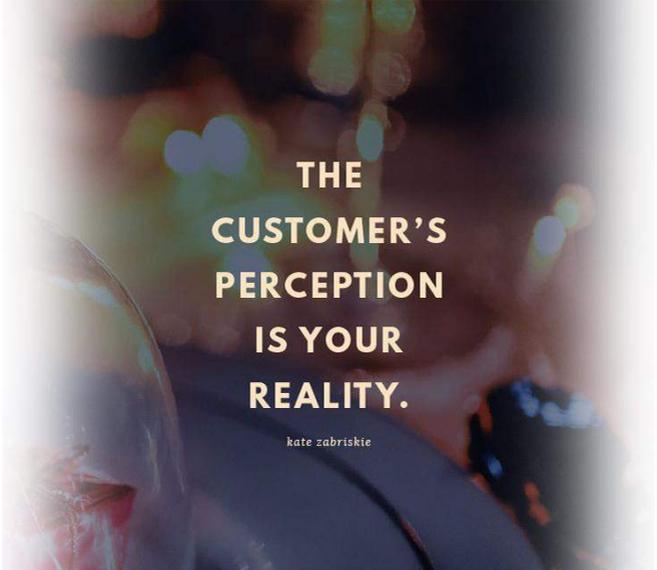
# THE REAL TRAVEL EXPERIENCE

Already we are seeing huge investment by the hotel in design and technology and tremendous growth through lifestyle properties and soft brands. With this increased investment comes the ability to create better product differentiation offering everything from budget to high-end resorts. And the industry needs this investment in digital connectivity in order to counteract the ill effects of the shared platforms and rebuild their own customer base. The brands are indeed leading the way in this with the likes of Hilton offering a feature called "straight to room," where you can check-in via your smartphone, bypass the front desk, and use your smartphone as your room key.



There is a future where returning guests already have a customer profile with the hotel showing their personal preferences such as drink and linen choice, what they plan on doing during their stay, and any special requests and comments. Any requests the guest makes during their stay can be added to their profile to help form a deeper knowledge of the customer.

While Airbnb is the third-party provider in the peer-to-peer exchange, they do an excellent job at keeping close tabs on the entire user journey on both the guest and Airbnb side. On their site, users go through the discovery phase, they book and complete the stay, and finally, the host and guest leave their reviews of the experience.



**THE  
CUSTOMER'S  
PERCEPTION  
IS YOUR  
REALITY.**

kate zabriskie

Since every phase of the user experience is completed through Airbnb's channel, they're able to leverage the data to improve the guest experience, build their product and find new growth opportunities. Their methods leave valuable lessons for the rest of us for thinking about data.



Design is a huge factor in appealing to travelers in their 20s and 30s because, as proven by Airbnb, they're no longer seeking on standard hotel experiences. Airbnb's rally cry is "live like a local," and hotel chains are embracing that idea as well.

"Millennials don't want to walk into a chain and say, 'Oh, this looks like the one I stayed in last week on the other side of the country. They want to feel like it's homey, comfortable and interesting to look at.



Large hotel chains are busy developing new products that compete directly with Airbnb's target customer: Millennials.

These young customers comprise a large and growing segment of Airbnb's guests, which a recent study called "new gen" renters.

Hilton Worldwide have developed new soft brands such as



**tru**  
by HILTON™  
A REVOLUTIONARY  
NEW MIDSCALE BRAND  
trubyhilton.com

**3 KEY PILLARS**  
SIMPLIFIED  
+  
SPIRITED  
+  
GROUNDED IN  
VALUE

**BACKED BY THE  
POWERFUL  
HILTON ENGINE**

**102  
SIGNED  
DEALS**

**POTENTIAL  
TO CAPTURE  
18 MILLION  
NEW TRAVELERS**

**DESIGN FEATURES**  
98 KEY PROTOTYPE  
+  
SMALL FOOTPRINT  
(LESS THAN 2 ACRES)  
+  
4 ACTIVITY ZONES  
+  
FUN, FRESH,  
DESIGN-FORWARD  
AESTHETIC

**A PERSONALITY  
THAT'S  
FULL OF LIFE!**

**AWARD-WINNING  
LOYALTY PROGRAM  
WITH MORE THAN  
50 MILLION  
HILTON HHONORS  
MEMBERS**

**OUR 13TH BRAND**  
**A CATEGORY  
DISRUPTOR**  
HILTON  
WORLDWIDE

Tru by Hilton and Canopy by Hilton that it said filled a “massive void in the midscale category.”

Tru embraces what Hilton calls “a millennial mindset,” which it describes as “a youthful energy, a zest for life and a desire for human connection.” Practically speaking, it means being technology-forward, with bigger TVs and better programming, an updated check-in process with social media displays, and “digital” keys available through a smartphone app.



While the Canopy brand aims to concentrate on the value of design and the shared lobby space as a way of localising their offer and creating ultimate sharing spaces.

The logo for Moxy Hotels features the word "moxy" in a vibrant, cursive purple font. Below it, the word "HOTELS" is written in a clean, black, sans-serif, all-caps font.

Marriott has also been busy expanding its Moxy brand, a new hotel chain ” created especially for the millennial traveler.” The hotels, which initially launched in Europe, combine a contemporary design and “approachable service” at a reasonable price — an obvious appeal to price-sensitive Millennials who stay with Airbnb. Marriott expects to be operating 150 Moxy Hotels within a decade.



**R**  
RENAISSANCE®  
HOTELS

Marriott's Renaissance brand is taking design to a hyper-local level by using themes that match the neighborhood of each hotel's location.

Renaissance's new hotel in New York's Garment District features fashion-themed artwork made from the backs of high-heeled shoes, push pins and collar stays, and coasters that look like buttons and sewing machines. Its Montreal location features graffiti to match the downtown art district

Boutique hotels are particularly well positioned to offer local flavour and compete for the millennial audience.



21c Museum Hotels, a boutique chain in the US has tons of local flavour.

Each hotel features a contemporary art museum on the first floor, and they're all built in restored historic buildings. The chain also partners with local art museums, retailers and distilleries to host events. They are offering something more than just a place to spend the night - when you walk into their front doors, you can have a cultural experience in addition to a lodging experience, and that appeals to millennials.



"There's a great appetite for cultural experiences in the market now. There is huge potential for hotels to combine with other local commercial ventures in order to offer differentiated experiences. Hotels can combine with local breweries and restaurants along with art communities to create cultured food and drink experiences.

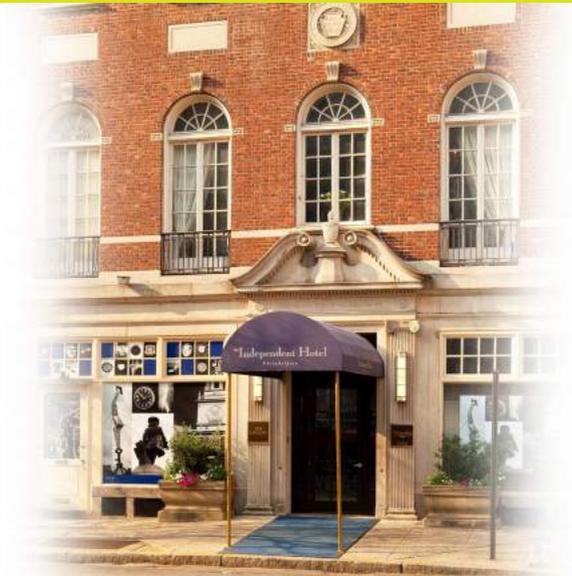


*Radisson* **RED**

Most definitely this is the demand of the current millennial traveller who wants the whole immersion into the local context but most importantly is thinking ahead - creating memories and connections to future travel or something a bit more long term. In some cases, having the resources of a big hotel chain is an advantage because it lets these brands create unique marketing programs that appeal to young travelers.



Affordability is another value proposition at both Moxy and Red with rooms at a lower price point than the chains' luxury brands. Millennial-targeted hotel chains are value-brand hotels, but what they're doing differently than old-school budget brands is, they're focusing on the design aspect, which is huge for millennials. The branding, the color schemes, the layout of the hotel—it's all been turned on its head. It's a lower-cost option, but they're doing it with some flair. You look forward to staying at these places because they're fun, and they're hip and cool and new.



This is all very well for the branded hotel with the considerable clout of corporate shareholding behind them and indeed it is necessary in the marketplace for these hotels to take the initiative and drive especially in the nexus for technology. But what about the independent and individually owned hotels.



How do they compete? The 2 D's - data and design are still very relevant though the capital to invest in the former tends to be ill-balance in comparison to the latter. The investment in digital connectivity and multi-technology platforms can be an expensive investment for many independent hotels, considering that with the adoption of a digital policy it still onlys brings them to the playing field.....for them the advance needs to be more physical and bring them right up the competitive ladder....here their focus is primarily on the design aspect and how their design may make them compete better in this market....Two of our most recent hotel projects have posed this very question to us as designers at Douglas Wallace...In the era of new experiences and the gleaning and recording of these experiences how can the design of the hotel best draw in these millennials and by extension create interest awareness and pick-up across the full demograph

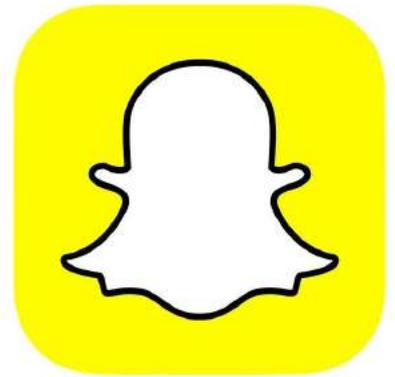


In thinking about this we decided to down all drawings tools and do a bit of thinking.... Blue sky thinking as it were.....the navel gazing kind...It was clear from all our research and investigation that the success of these new traveller platforms was not so much about the bed and bedspace....but rather about the experience wanted that I referred to earlier. The desire for personalisation of experience was seen as a constant amongst all the hotel and airbnb users - in retail we refer to it as the customer journey! So this was all clear as day but we asked the question why? Why this increased need for personalised experience and most essentially the need to express this personalised experience. The expansion of our social media networks into such apps as.



Instagram

facebook



snapchat, facebook and Instagram has enabled us to share....share our trip...share our travel...share our experience! And in sharing our experiences with others we are sharing our memories!

Memory was the key.

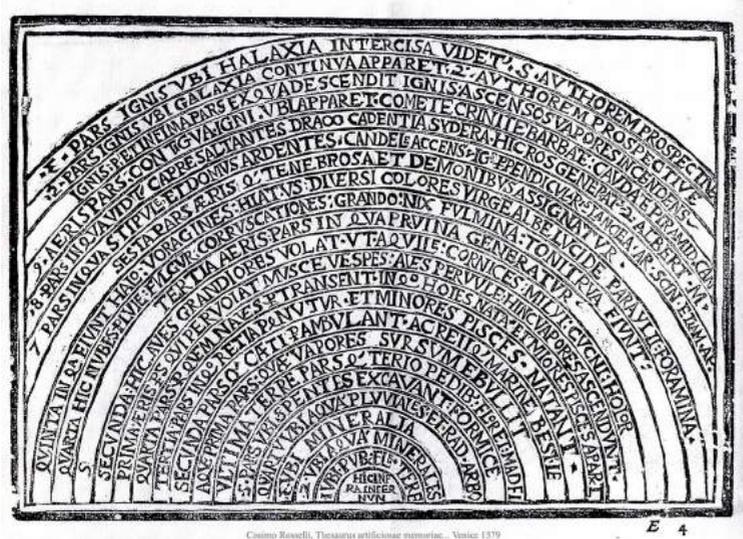


Memory is the basis  
of every journey.

Stephen King

[quotezancy](#)

The need for personalised experiences was the desire to create memories in an ever changing and fluctuating world. Where ‘8 seconds’ is the supposed number of seconds Millennials and the upcoming Generation Z takes to process information, there is a psychological desire to create memories to hold onto.



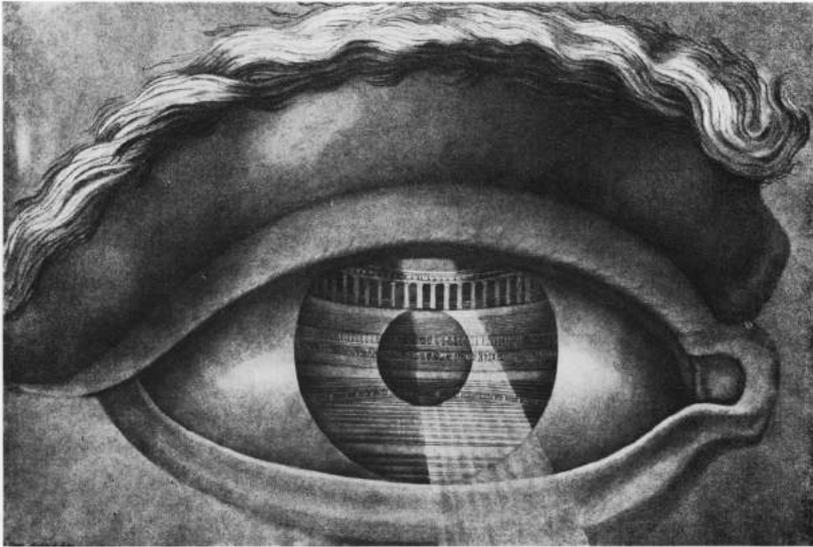
Cosimo Rossetti, *Thesaurus artificiosae memoriae*... Venetia 1379

E 4



The Greeks and Romans had long taught the virtues of what they called the ‘artificial memory’. They espoused techniques whereby the student of rhetoric could create places and spaces within his mind and thereby supplant ideas, images and words for later recollection and on-demand -recall.





all very lofty and I'm sure of great interest to the philosopher but for us as designers very interesting in creating the connection



At The Garryvoe Hotel in Cork we were presented with a series of Ground floor F&B spaces which while functional were bland and blended seamlessly into each other with no personality emanating from the environment.



Immediately we started to look at how our new navel gazing idea could manifest itself.... The client had a desire to create a destination offer - a full experience in itself - Part of this investment was not just the environment but the revitalised F&B offer - In a time in which almost every experience can be digitized,



food stands alone as stubbornly analog. Perhaps that's why culinary travel experiences are now the most popular method for driving tourism business. Food has an unmatched ability to communicate a unique sense of place. Local cuisine provides a direct connection to the history of a region, the soul of its people and the rhythm of daily life. We all remember truly good food experiences - so just as we were appealing to the sense of sight, smell and taste to create memories, we as designers wanted to create memorable spaces for this all to happen within.



For us it was a deliberate sense of more is a lot more! We started by deciding to layer colour, texture and image into our approach so that we could appeal to the visual as much as possible – being memorable... we then set about creating 3 individual spaces, the sun room



With deliberate coolness, calmness and filtered natural light..



With small intimate spaces....to the



...the dining room..wide open – all encompassing and creating a different view with every look....



With a spectacle of a bar centre stage as the trumpet to the ...



....sophisticated library with its collection of memories..



A brand new dramatic space creating a brand new memorable customer journey...



Filled with interest, colour and vibrancy.



At Galgorm resort and spa, the hotel was already a successful leisure offer but again needed to up its ante to try and draw better and wider custom.

The client had a vision for the ultimate spa experience, incorporating F&B offers as a way to drive bed occupancy. Fundamentally it was about the fullest experience. But this wasn't about calmness and tranquility – it was also about indulgence and feast of the senses - the perfect palette for the creation of memories.



The key move was to create a journey - a journey fulfilling the key luxury spa experiences....all within the existing canvas of the beautiful riverside grounds...



bathing, soaking, sauna, steam room, yoga, hot tub, snow room , dining, imbibing would all be now set out along a considered external walkway from which you would wander and happen upon your spa venture



All set in the tranquility of the garden for an altogether different experience

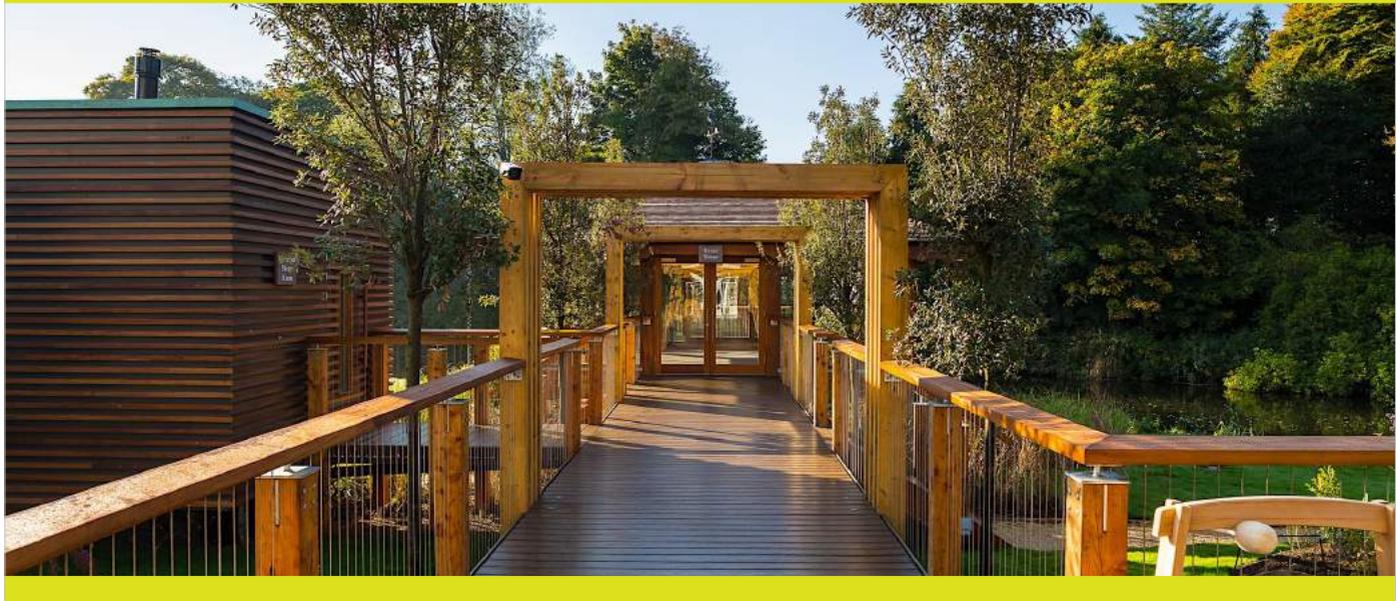


Creating a promenade for guests to wander at ease and stop at ease at whatever area of the spa experience they wanted, to partake alone or to share.

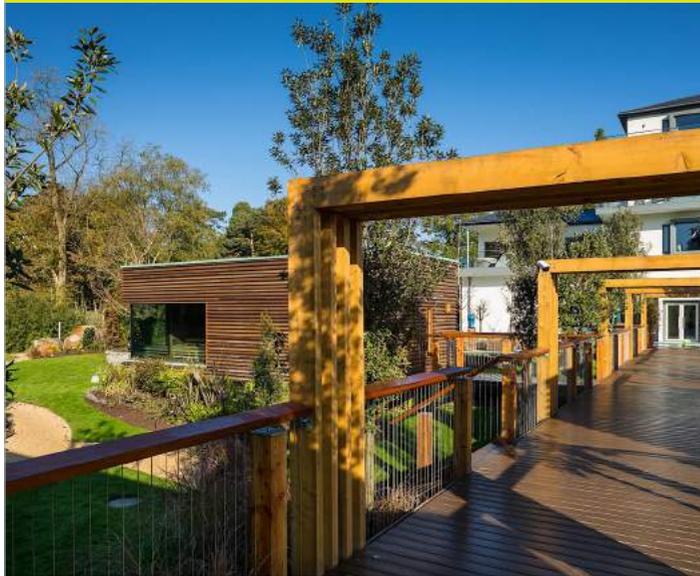
Starting in the large light filled pool



## Title Slide



Leading out the onto the elevated timber walkway....



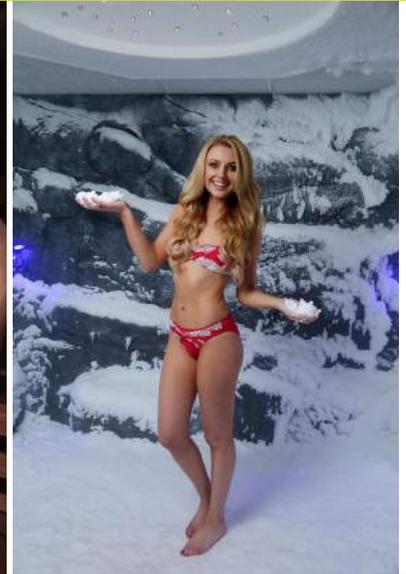
Turning left or right into either the sauna cabin  
or the steam room pod....



Pausing in secluded rest and relaxation areas...



or venturing off into your own Canadian hot tub to sip prosecco whilst gazing at the riverside...



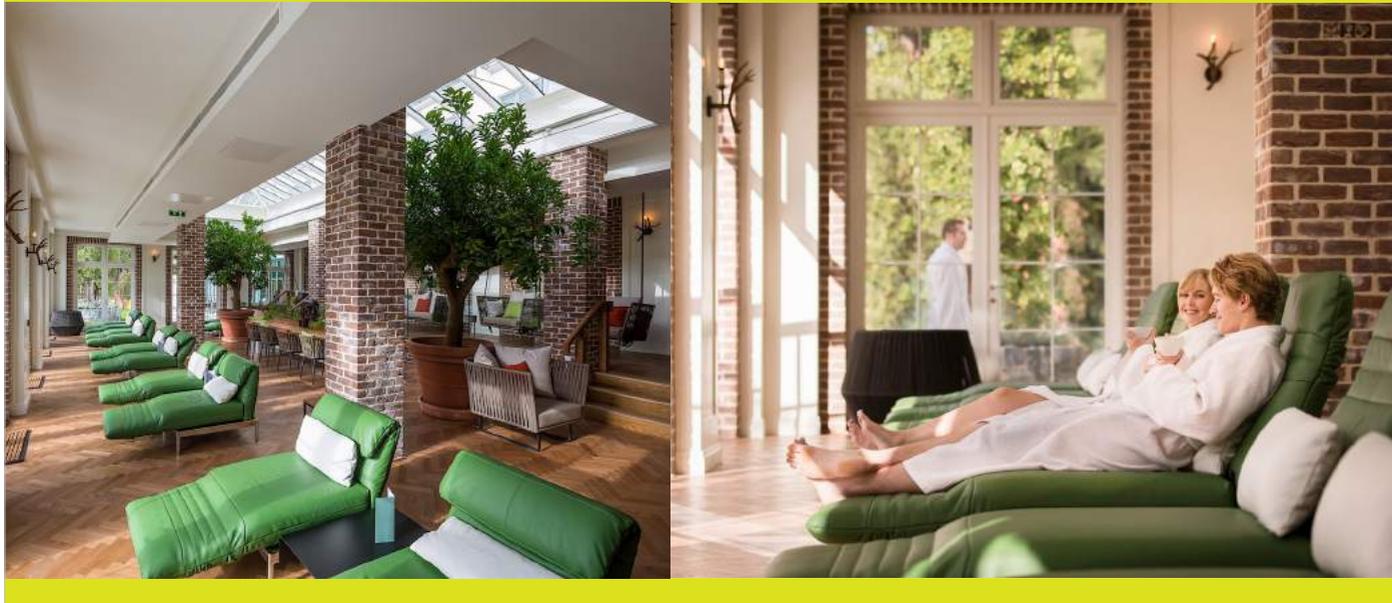
Or partaking in the swedish sauna session or freezing it out in the arctic snow room..



culminating in the river room for some yoga relaxation perched over the flowing stream beneath.....



Before making ones way back again along the promenade, meandering and partaking only to end in the purpose built relaxation orangerie...



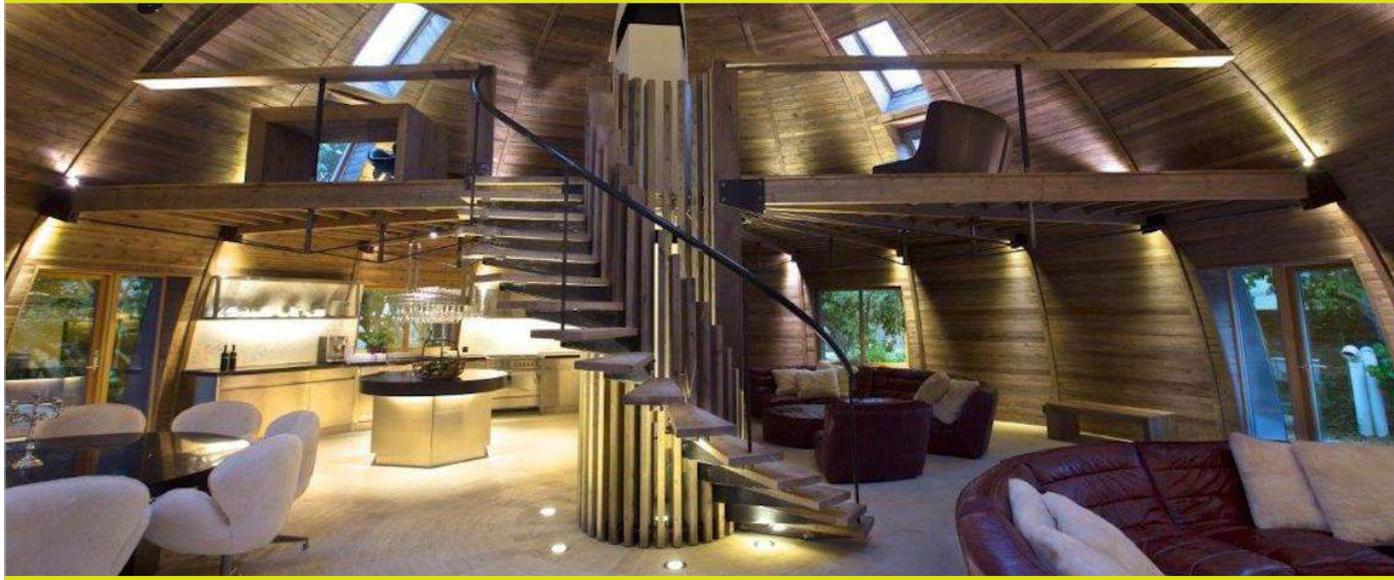
sitting down to enjoy a specially created cocktail and recounting the journeys experiences - proper memories. Through the consideration of the guest and the guests experience we sought to use the design to enhance the journey.



This journey however is not yet complete with the final destination on the route being a fully fitted Halodome garden restaurant



Pause



Which we hope completes for the guest a very very memorable Hotel experience...

In fact one of our key images at the very start of our concept, when we were at the research stage was the image of the toga clad roman



Wandering in the garden and creating his memories..... but little did I know that one of our final finished marketing images would strike a similar chord..



THANK YOU VERY MUCH...