

ULI Fall Meeting 2015

Resorts Reimagined: From Urban to Destination

Scott Lee, President/Principal | SB Architects

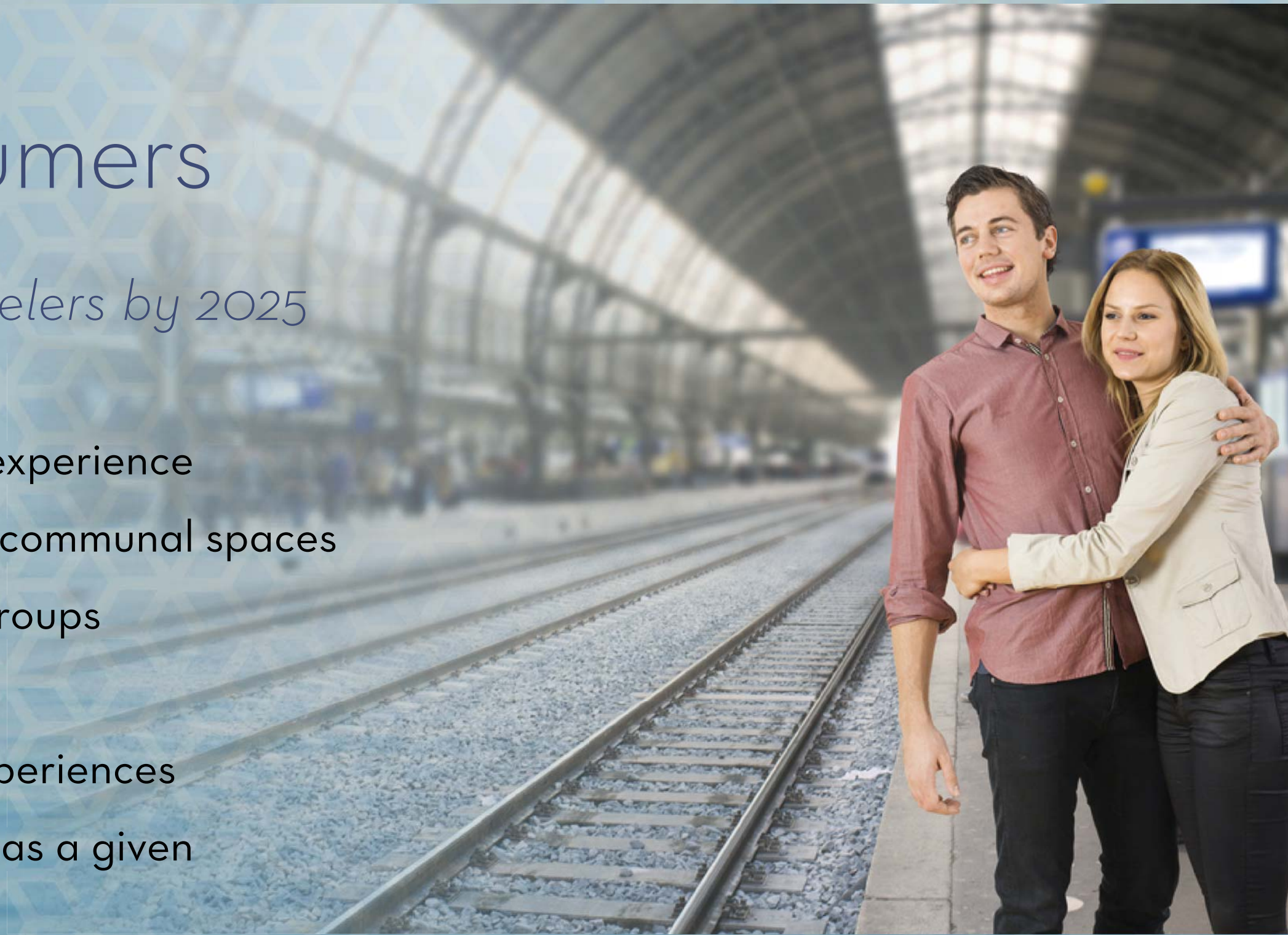


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The New Consumers

Millennials: *50% of all travelers by 2025*

- Value experiences over stuff
- Expect an individually tailored experience
- Embrace social interaction and communal spaces
- May travel in extended family groups
- Seek transparency and value
- Crave meaningful, authentic experiences
- See environmental stewardship as a given
- Hold a global world view



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The New Consumers

Baby boomers: *Adapting and adopting*

- Don't think of themselves as aging
- Quickly embracing new technologies
- Redefining luxury away from conspicuous consumption and toward authenticity
- Embracing their passions
- Traveling with children and grandchildren
- Rank travel as their #1 leisure activity



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Trends in the Resort Experience

- Co-branded resorts
- Immersive experiences
- Agritourism
- Travel as learning: the cultural concierge
- Private club experience
- Lobby as living room
- Fitness beyond the gym
- Personalized technology

Trends in the Resort Experience

12 Oaks Winery Resort

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Trends in the Resort Experience



Dorado Beach, A Ritz-Carlton Reserve

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Trends in the Resort Experience

The Battery

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Trends in Architecture

- Authenticity is the new luxury
- Transparency allows authentic experience
- Resort design is moving toward modern
- Communal spaces facilitate social interaction
- Flexible spaces allow adaptation
- Adaptable accommodations for family travel
- Go local

Trends in Architecture

Amangiri

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Trends in Architecture

Calistoga Ranch, An Auberge Resort

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Trends in Architecture

Dorado Beach, A Ritz-Carlton Reserve

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Trends in Architecture

The Battery

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Sustainability

TRAVELERS CONNECT PERSONAL AND ENVIRONMENTAL WELLNESS

- Ecotourism
- Giving back
- Travelers see environmental sustainability as a given
- Cultural sustainability is imperative
- Challenge: adapting existing hotels & resorts



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Urban resorts

A GROWING TREND

- The city as amenity: minimal amenities
- Single-focus properties: hotel as library, gallery
- The social club: hospitality without the hotel
- The rooftop: the new social space
- Flexibility: alternative meeting spaces
- Adaptive use of historic properties
- The urban eco-resort

Urban resorts



Andaz San Diego



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Urban resorts

W Santiago

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Urban resorts

21C Museum Hotel

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The changing look of destination resorts

- Authenticity is the new luxury
- Mixed-use
- Local
- Transparent
- Understated
- Moving toward modern



The changing look of destination resorts

Amangiri

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The changing look of destination resorts

Calistoga Ranch, An Auberge Resort

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The changing look of destination resorts

Starwood Vacation Ownership

PREMIUM
EXTERIOR FACADE

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The changing look of destination resorts

Ascaya Las Vegas

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Core Design Principles

- **Authenticity** is the most important element of luxury
- **Transparency** is the key to authenticity
- **High design and high sustainability** are mutually supportive
- **Wellness is a lifestyle**, not a work-out room
- **The site** is a resort's greatest amenity
- **Flexibility** is the key to lasting design
- **Good design is timeless**

Thank You