An aerial photograph of a beach scene. At the top, a road with cars and a yellow truck runs horizontally. Below the road is a row of palm trees. The beach is sandy and populated with many people, many of whom are using blue beach umbrellas. The ocean is a vibrant turquoise color with white waves breaking on the shore. The overall scene is bright and sunny.

What's Happening in Hospitality? The New Brands, The New Breed

2019 ULI Florida Summit

The Gaylord Palms - Kissimmee, Florida



THE PLASENCIA GROUP
Passion. Access. Certainty.

What's Happening in Hospitality?

The New Brands, The New Breed



Moderator: Lou Plasencia
Chief Executive Officer
The Plasencia Group
Tampa, Florida



Scott Berman
US Hospitality & Leisure Practice
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Miami, Florida



Josh Taube
Executive Vice President
Strategic Property Partners
Tampa, Florida



Barry Bloom, PhD
President & Chief Operating Officer
Xenia Hotels & Resorts
Orlando, Florida



Jim Tinson
Chief Executive Officer, Partner
Hart Howerton Architects
New York, Florida

Defining the New Style of Lodging Offerings

The Legacy Brands	The “Non-Brands”		
Hard Brand <ul style="list-style-type: none">■ Nationally franchised■ Prescriptive brand standards■ Homogenized design■ Designed for corporate and/or leisure traveler■ Usually about 18,000 to 20,000 square feet of meeting space■ Segments range from select service to full service to luxury, and from suburban to urban to airport to resort	Boutique Hotel <ul style="list-style-type: none">■ Independent or part of smaller national or international brand■ Typically under 250 guest rooms■ Design-centric■ Usually less than 10,000 square feet of meeting space■ Restaurant and lounge on site or near unique local dining and entertainment options■ Generally upscale to luxury	Lifestyle Hotel <ul style="list-style-type: none">■ Nationally franchised■ Prescriptive brand standards■ Design-centric■ Designed for travelers interested in boutique lodging■ Offer a lounge and typically light food on site■ Generally upper-midscale to luxury	Soft Brand Collection <ul style="list-style-type: none">■ Affiliated with a major national franchise distribution system■ Fewer brand standards■ Signature hotels, individually named and branded■ Unique in design■ Generally offer at least one restaurant and lounge■ Generally upper-midscale to luxury

The Brands and “Non-Brands”

The Legacy Brands

Hard Brand

- Crowne Plaza
- DoubleTree
- Grand Hyatt
- Hilton
- Hyatt Regency
- InterContinental
- Loews
- Marriott
- Park Hyatt
- Renaissance
- Ritz-Carlton
- Sheraton
- Waldorf=Astoria
- Westin
- Wyndham

The “Non-Brands”

Boutique Hotel

- 21C Museum Hotels
- Ace
- CitizenM
- Dream Hotels
- Delano by SBE
- Graduate Hotels
- SLS Hotels
- Mondrian by SBE
- NYLO Hotels
- Room Mate
- Sixty Hotels
- Valencia
- Viceroy
- Virgin

Lifestyle Hotel

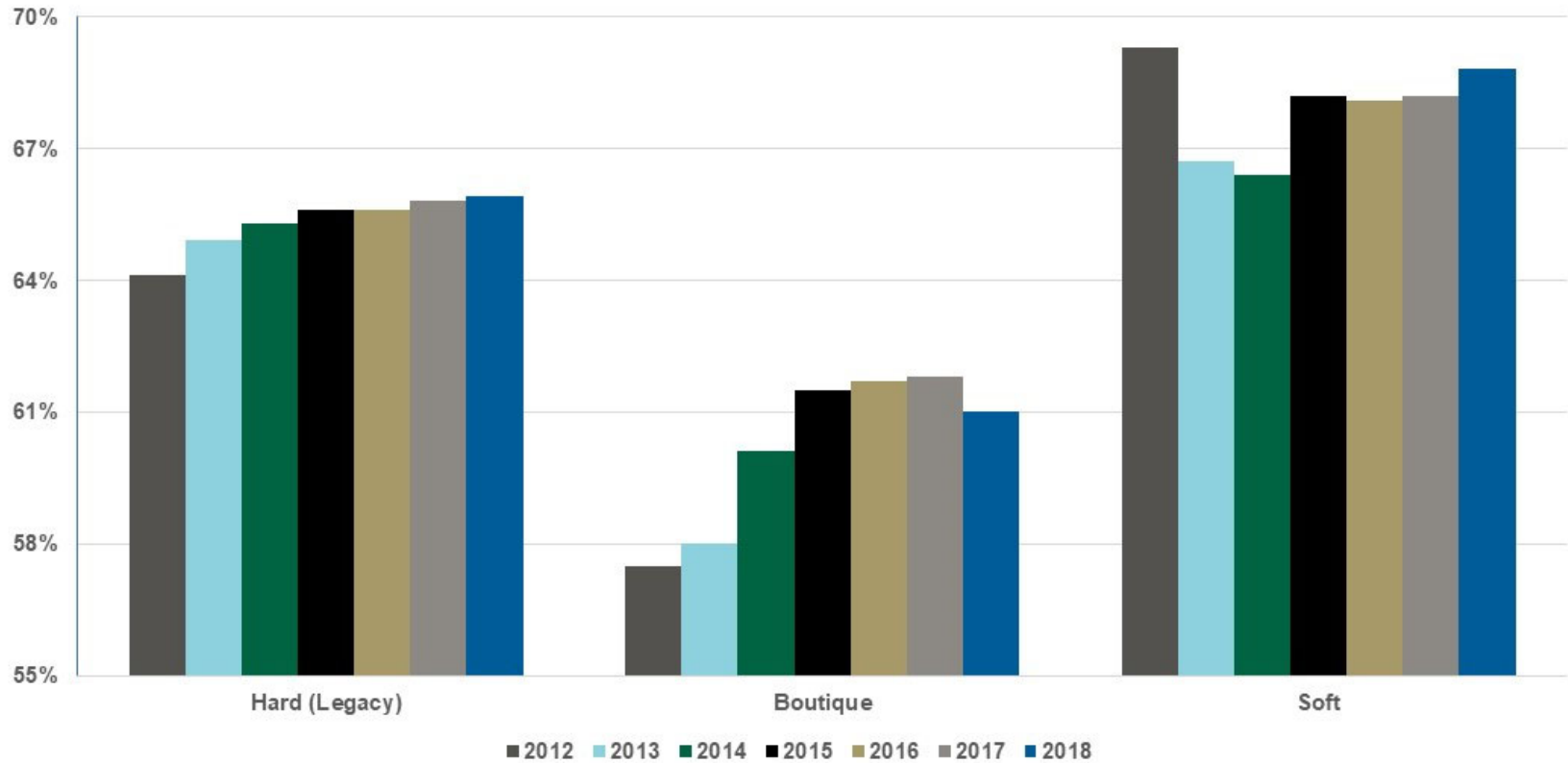
- AC by Marriott
- Aloft by Marriott
- Andaz by Hyatt
- Cambria by Choice
- Canopy by Hilton
- Centric by Hyatt
- Edition by Marriott
- GLO by Best Western
- Indigo by IHG
- Kimpton by IHG
- Le Meridien by Marriott
- Motto by Hilton
- Moxy by Marriott
- Red by Radisson
- Thompson by Hyatt
- TRYP by Wyndham
- Vib by Best Western
- Voco by IHG
- W by Marriott

Soft Brand Collection

- Aiden by Best Western
- Ascend by Choice
- Autograph by Marriott
- Curio by Hilton
- Destination by Hyatt
- Dolce by Wyndham
- Joie de Vivre by Hyatt
- Luxury Collection by Marriott
- Registry Collection by Wyndham
- Sadie by Best Western
- Tapestry by Hilton
- Tribute Portfolio by Marriott
- Trademark by Wyndham
- Unbound by Hyatt

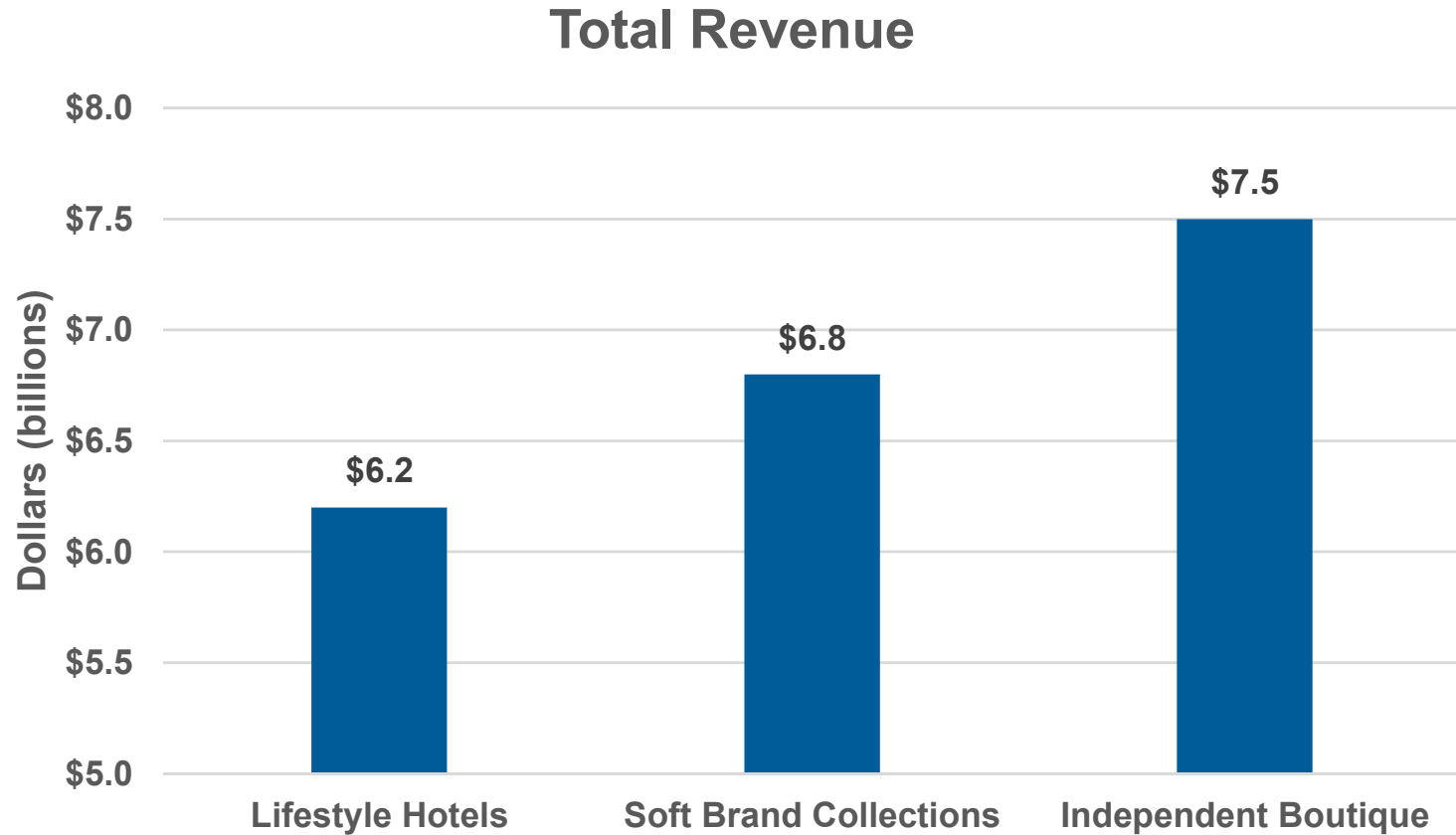
Hotel Occupancy Performance - Hard, Boutique and Soft

Occupancy Comparison
(Hard, Boutique and Soft)



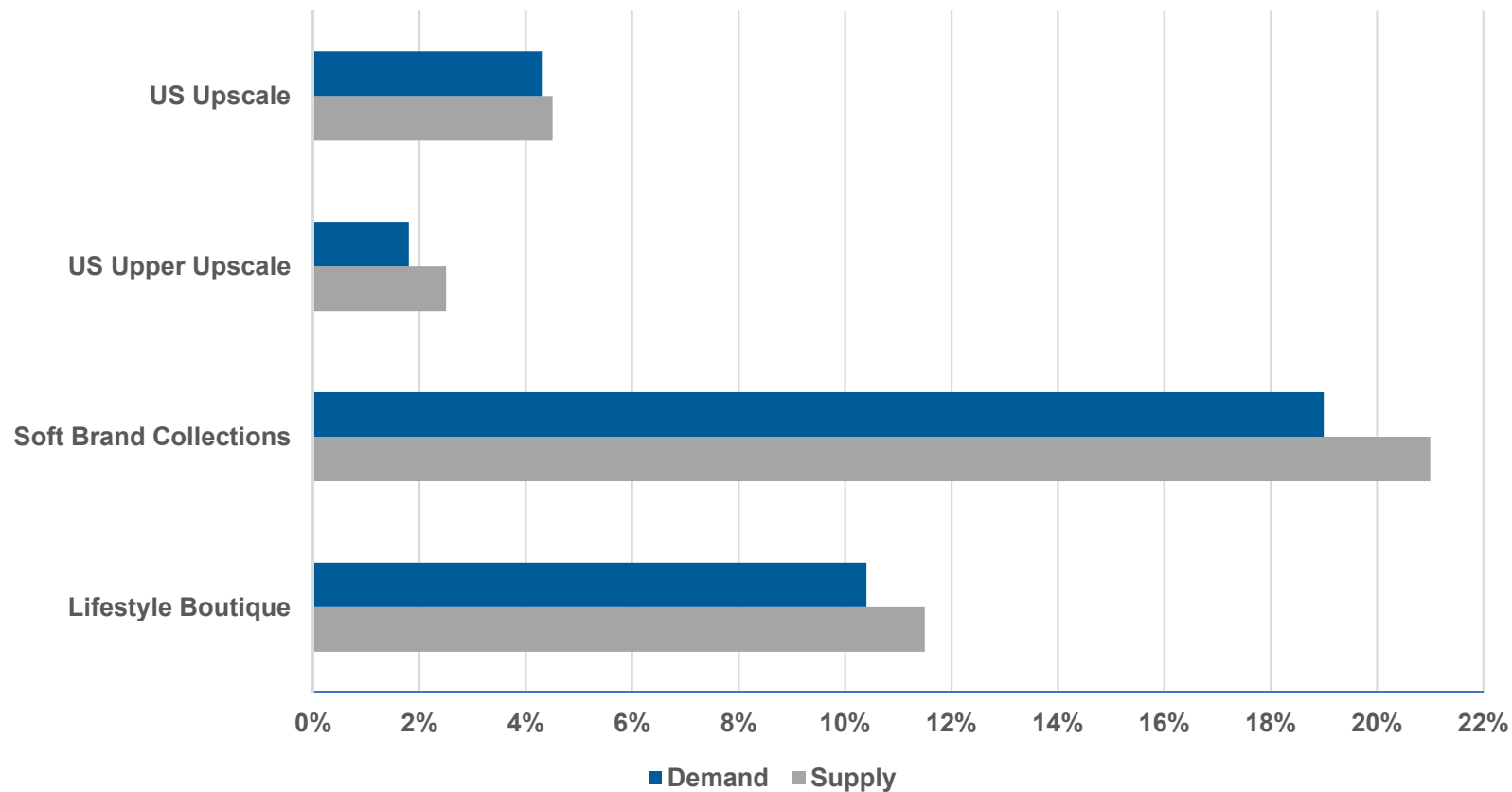
Source: The Highland Group

Hotel Total Revenues – 2018 – Lifestyle, Soft and Boutique



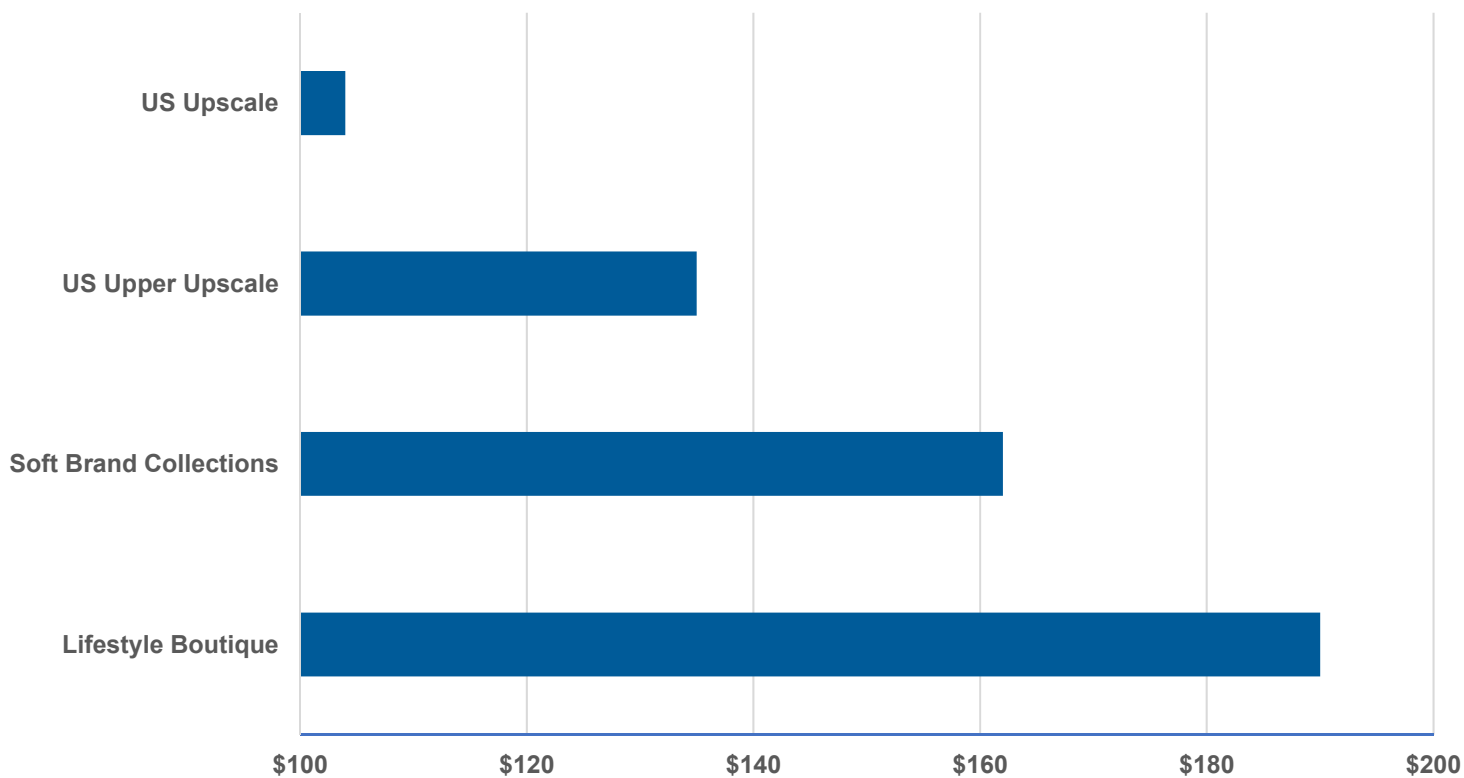
Sources: STR and The Highland Group

2018 Supply / Demand Change – Comparison



Sources: STR and The Boutique Hotel Report 2019

2018 Revenue per Available Room – Comparison



Sources: STR and The Boutique Hotel Report 2019

Typical Design Elements

- Experiential environment (library, billiards, fitness, etc.)
- Neighborhood influence
- Less clubby, less intimidating
- More fun room, less ballroom
- Living room experience where no one is a stranger
- Eat and drink to the beat
- Pop-up places and events; unique and customized experiences
- Brand reliability and service, without the brand presence
- Cutting edge tech; mobile room key

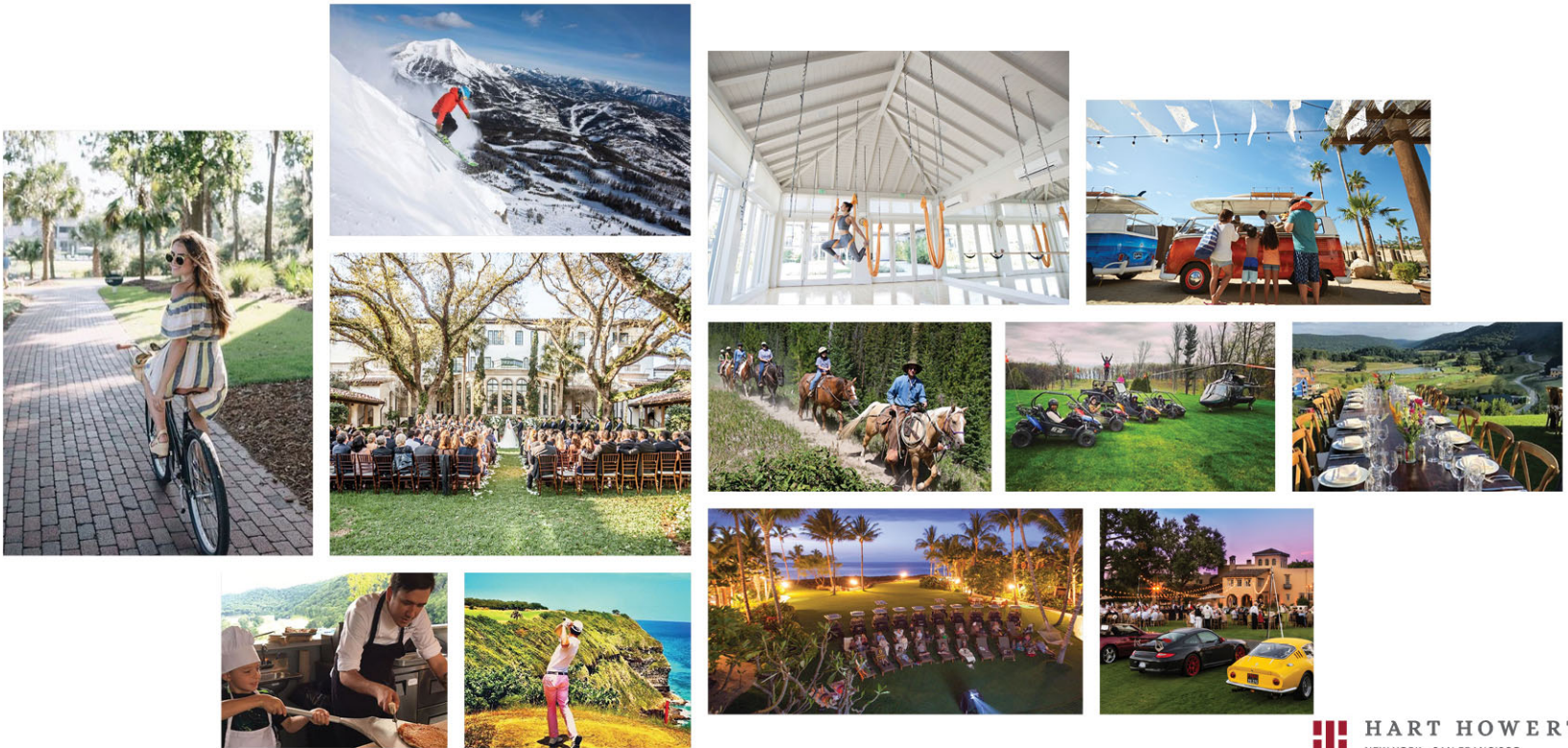
Sources: Building Design & Construction Magazine, The Plasencia Group

Hart Howerton Architects



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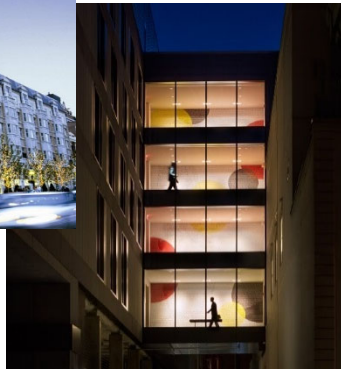


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Xenia Hotels & Resorts



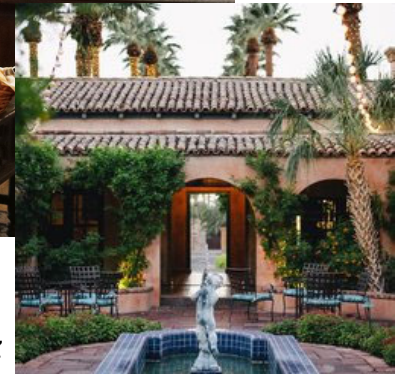
Hotel Commonwealth
Boston, MA



Grand Bohemian Hotel,
Autograph Collection
Charleston, SC



Royal Palms Resort & Spa,
Hyatt Unbound Collection
Phoenix, AZ



Hyatt Andaz Napa
Napa, CA

Strategic Property Partners



Water Street Tampa
Tampa, FL



The Tampa EDITION
Tampa, FL

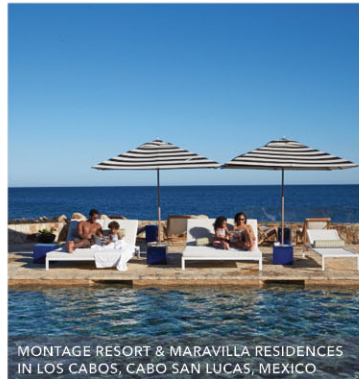
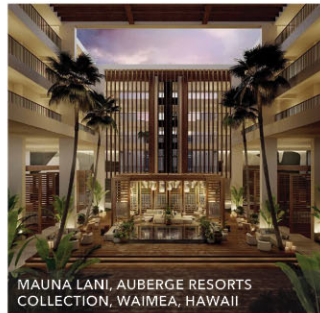


JW Marriott
Tampa, FL

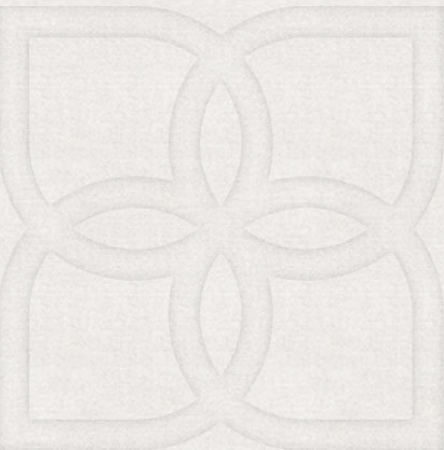


Marriott Tampa Water Street
Tampa, FL

Strategic Property Partners



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