

FUTURE ZONE





Introduction

The aim of *Future Zone* is to consider global trends in hotel design, guest expectations and new initiatives that can be considered in developing the Zone brand over the next 10 years. The term ‘trend’ describes a shift in behaviour or a more generalized situation change. Hospitality trends may include changes in how customers behave, new ways of providing hospitality services, or moves towards adopting new hospitality technology.

Project Orange have a long creative relationship with the Park Hotels going back to 1999 when James Soane was the designer of the Park Hotel, Bangalore. Over the past 20 years he has been instrumental in the refurbishment of the Park Navi Mumbai, the refurbishment of Bangalore, I-Talia restaurant in Delhi, Someplace Else in Mumbai and the design of Zone. James has travelled extensively in India and across Asia, having a deep knowledge and affection for the culture and people. In 2011 James was a VIP guest on the UK Prime Ministers Trade Delegation to India. According to a 2023 report by Mordor Intelligence the Park Hotel group are one of the top five major hospitality companies in India (the other four being Oberoi Hotels & Resorts, ITC Hotels, Lemon Tree Hotels and Taj). The travel market in India is projected to reach US\$ 125 billion by 2027 from an estimated US\$ 75 billion in 2020. This is an opportunity therefore to reflect on how that brand has grown and where it might be heading.

Context

According to the IBEF, by 2030, India is expected to be the world's third-largest economy, accounting for approximately 8.5% of the global GDP. Last year Tom Rowntree, IHG's vice president of global luxury brands, stated that by 2025, 61% of luxury consumers will comprise Millennials and Generation Zers. This also accounts for the influence of children making decisions on family travel. These high level figures speak of both an opportunity for growth as well as a young demographic who are concerned about the planet and their carbon footprints.

While the COVID epidemic ravaged the hotel sector, in 2022 India bounced back. All India Occupancy was reported at 59.8% with an ADR of Rs. 6.1k; near complete RevPAR recovery on all India level compared to 2019; Same store hotels reported 67.8% Occ, as against the all-India Occ of 59.8% . Looking at the construction of new rooms, five countries in the Asia Pacific region, excluding China, account for 61% of projects in the region's total pipeline. The country with the largest is India with 383 projects translating into 47,539 rooms. Considered to be a 'sunrise industry', the hospitality sector is expected to touch \$460 billion by 2028.

In February 2023, Julia Simpson, CEO of the World Travel and Tourism Council, noted: "Our recent Economic Impact Research showed that we expect India to overtake Germany to become the world's third most powerful Travel & Tourism market by 2032, and that its sector will outpace the overall economy every year for the next decade." Furthermore a 5-year tax holiday has also been offered for 2-4-star category hotels which will be located around UNESCO World Heritage sites in the country.



Climate and Biodiversity Emergency

At the beginning of this study it is important to acknowledge the global climate and biodiversity emergency that is already adversely affecting the planet that will inevitably get worse. The IPCC (Intergovernmental Panel on Climate Change) warns of rising temperatures increase the likelihood of the threat of heatwaves across Asia, droughts in arid and semi-arid areas of West, Central and South Asia, floods in monsoon regions in South, Southeast and East Asia, and glacier melting in the Hindu Kush Himalaya region. It also describes increased risk to health, disruption to supply chains and infrastructure, drought and water shortages, unstable energy sources and finally the question of geopolitical stability in a stressed environment. The Times of India reported that India is the fifth most vulnerable country in the world to climate change.

The IPCC states carbon emissions need to drop to net-zero by mid-century for a 50 per cent probability of limiting global warming to 1.5 degrees above pre-industrial levels. As the right to development goes together with the right to a clean, healthy, sustainable environment, “we must end the merciless, relentless, senseless war on nature,” said Mr Guterres. This is backed up by the G20 Climate Risk Atlas which underlines the country is already facing devastating impacts from climate change. In the next 30 years, the length of heatwaves will increase by 2,515%.

Key to tackling these high-level threats is an understanding of adaption and resilience; the array of strategies and measures that are available include a wide range of actions that can be categorised as structural, institutional, ecological or behavioural. Striving for Climate Resilient Development means reducing exposure and vulnerability to climate hazards, cutting back greenhouse gas emissions and conserving biodiversity are given the highest priorities in everyday decision-making and policies on all aspects of society including energy, industry, health, water, food, urban development, housing and transport. It is about successfully navigating the complex interactions between these different systems so that action in one area does not have adverse effects elsewhere and opportunities are harnessed to accelerate progress towards a safer, fairer world.

At COP27 India's target date to reach net zero emissions remains 2070 - much later than the date set by many other countries and not in line with the Paris agreement, which proposed 2050 as the target date for net zero to keep global temperature rises to 1.5C. Unfortunately India's coal requirement is set to increase by 50% in the next decade. Collectively we have will to understand that climate change demands we consume less and lower our carbon footprint.

Furthermore, there are significant concerns over the carbon footprint of those flying. Within India the sector and exploded over the past 25 years, moving from having a national carrier, Air India, who provided most of the internal air travel, to a privatised market with many providers competing for growing business. The Indian domestic aviation market is currently the fastest growing domestic market on the planet and is going to be the third largest air passenger market by 2025 as against the seventh largest in the world as of 2017. Aviation accounts of 2.5% of global CO2 emissions. In February 2023 Air India announced it has ordered 470 new planes from Airbus and Boeing . The country is also building at least 80 new airports over the next five years as part of its focus on state-led capital expenditure on infrastructure. The average Indian emits just 18 kilograms from aviation this is much, much less than even a short-haul flight which confirms that most did not take a flight. In 2018 India contributed 2.6% of global CO2 emissions while the UK is 4%, China 12.7% and Canada 2.3%. However as an individual, the choice to not fly is considered the most significant step in reducing your own carbon footprint. It has been estimated in the region that over a 1,000 km journey, an air traveller emits 285 kgs of CO2 kilometre while a railway passenger in even an air-conditioned executive-class compartment emits 30 kgs. While over the past few years, there is an increased awareness and sensitivity among travellers towards sustainable travel. Vipul Prakash, COO of MakeMyTrip, explained ‘we are looking forward to empowering travellers with options that allow them to make sustainable choices and do their bit for the environment even while travelling’ referring to new initiatives for carbon offsetting in India, yet there is concern across the sector that this is a greenwashing tactic with little measurable success.

By far the largest emission in the country is from burning coal followed by oil; both used to generate electricity which in turn powers our cities and therefore our hotels. The next largest sector is agriculture followed by manufacture and construction. At COP27, India submitted its Long-term Strategy for Low Carbon Development (LTS) which provides a breakdown of initiatives by sector, but these do not go beyond current policies and general future direction. Based on its LTS, India plans to continue to develop coal in the long-term. Overall, the level of information provided is extremely limited with no emissions pathway to demonstrate how India will reach net zero by 2070. It remains unclear as to whether India's net zero by 2070 target covers all greenhouse gas emissions, or just CO2. The CAT evaluates India's LTS as "Poor".

While this is not a problem specific to India, we are left with the question of how can we as individuals and as business' make ethical green choices and be part of the change needed to achieve carbon net zero? To create a healthy future the hotel industry is in a pivotal position to show the way.

‘We need a common project to transform our societies and support new ways of living and working....into a reparative economy founded on the nurture of life, common care, and solidarity.’

Plant on Fire: A Manifesto for the Age of Environmental Breakdown (2021)



CLIMATE EMERGENCY IN INDIA

HOW TO BALANCE LIVELIHOOD AND ECOLOGY



Zone Hotels 2012 - 2023

In 2012 the original brief for the new hotel brand was ‘to be a social catalyst for second cities – a place to be seen and connect....This is us. Social by design.’

It was also acknowledged that there would be different types of building, those that were new build and therefore designed to reflect the brand standards, and those that were either under construction or being re-branded which would not fully conform fully to the design criteria. It was therefore agreed that the design process would be based on a generic block plan, common across the country, that would demonstrate the principle of the design. This was then taken by the in-house team and applied to the first new-build site in Coimbatore. Project Orange provided guidance, and a sample room was constructed in Delhi which served as a blueprint for the roll-out.

The original concept spoke to ideas of flexibility and creative re-use, as a way of thinking about sustainable futures. The design seeks to establish a connection between the traveller and the place by creating a contemporary collage of the country and its traditions.

For the public areas, inspiration was taken from the traditional market bazaar – a public place of intuitively organised large open plan space with focal points of interest for different guests. The proposal for the guestroom is stripped back with a design edge and is zoned into areas of activity; a large piece of bespoke black oak joinery with playful coloured recesses creates the Dream Zone – a place to rest your head after a busy day; a cleverly designed desk encompassing the mini bar, tea tray and TV connectivity points forms the Work/Play Zone for business and leisure use; and the perfectly formed ‘shower only’ bathroom becomes the Wash Zone.

Zone Coimbatore opened in December 2014 and Project Orange offered design input into hotels in Raipur, Jodhpur, Bengaluru and Jaipur. There are also hotels in Chennai, Delhi, Dimapur, Goa, Gopalpur, Jammu, Kolkata, Pathankot, Phalodi and Port Blair with new hotels planned in Manali, Yadagirigutta, Puravenkara, Mahabalipuram, Srinagar, Amritsar, Muzaffarpur, Andaman, Siliguri, Alibaug, Digha and Patna. What becomes clear is that each property is very different, and there are many different styles and space standards across the portfolio. This adds a sense of adventure to the brand, taking on the suggestion that each hotel is unique to the location, offering a new experience. However, in some instances the conversion has been minimal leading to a somewhat inconsistent understanding of the Zone DNA. On a positive note, the re-use of existing hotels that have been sold on is an extremely carbon positive approach. It is therefore important to understand the connective tissue that bind this broad portfolio together which comes down to ideas of service, food and drink as well as standards of service and cleanliness.



In 2023 the hotel uses the strapline ‘Offline, online, always social by design’ going on to say ‘We are social animals. And thank god for that. Be it work or play, ‘tis the age of networking, connecting, collaborating. That makes for a happier, more productive world. This is the simple belief that made us reimagine the hotel experience....Our design philosophy keeps the social citizen, you at the centre of it all and builds a buzzing, curious, connected world around you. Relaxed and unboxy.

On Linked in the tagline reads: ‘Zone by the Park is a space that buzzes with life – a focal point of interaction that connects the guests and the city. Zone Hotel goes beyond the typical experience, through exceptional service and room quality is also paramount – we focus on multifunctional spaces that inspires networking and connection between guests. Add to these interactive space a happening bar and restaurant vibrant nightlife and spa services....Our brand is about being a social catalyst. It comes from our belief that we’re social beings in a country that’s increasingly wired to the world.

We can understand that branding is the practice of creating a unique identity for your hotel. It’s about establishing a clear and consistent message about what your property stands for and communicating that message to your target audience. A great hotel brand is one that understands its audience intimately. Having great amenities is a good start but it isn’t enough; you must tell a captivating story to your customers. This can be done through marketing campaigns and social media posts that showcase your unique offerings and experiences.

At this point it is worth reflecting on whether the guest is able to differentiate between the brands:

- Zone Hotels
- Zone by the Park
- Zone Connect
- Zone Palace by the Park

It seems that the Connect and Palace brands are more driven by leisure, however this is not explicit and it may not even be helpful. Again the website proclaims: “At Zone, the theory of friend-economics comes into play. This is about delivering a higher experience with unique design, great service and luxurious little extras at an unbeatable value. So that a guest becomes a friend for life. The WI-FI is free, the in-room mini bar and laundry service fares are guest-friendly. Ensuring that you always feel, you got more than what you paid for.” Is this coming across to the guest?



What the customer says

Looking at customer feedback (see appendix 1) is one way of gauging how customers feel about the hotel. In terms of the customer demographic most are Indian nationals, many on a business trip but some on vacation or celebrating an important occasion. Nearly every comment mentions the cleanliness of the hotel, which in a post-Covid environment is even more important than ever. However, in many ways this should be a given, though across the four star sector there is a divergence of standards offered by other chains and groups in the region. Connected to this are comments around maintenance where guests feel that at times the property is not looking its best. The size of the rooms attracts mainly positive comments. A great deal of emphasis is put on interactions with staff with many guests taking time to mention great service from staff members by name. The quality and quantity of the food and drink offer is also very important to guests. It is clear again that the waiting staff and attentive service, including room service, is key to a positive experience. When considering the location there are mixed comments that seem to depend on what visitors require. In business locations it is seen as a boon, though for tourists this can be a negative. A number of the newer properties are in tourist destinations, such as Goa and Phalodi, so the guest expectations are different and speak more to the ambience of the hotel and ability to relax.

Other observations include the difference in expectation from overseas visitors who have remarked on the lack of International cuisine, difficulty in making arrangements and the location of some properties. A number of additional comments are worth mentioning:

- **Be good to have openable windows**
- **Wifi is poor / costly**
- **Flies**
- **Consistency of buffet**
- **Parking**
- **Loud music in the bar**
- **Safety of lifts**
- **Value for money**

It is also interesting to consider what is not spoken of, at least on the Tripadvisor and Booking.com reviews. The overall design of the hotel is seldom commented on other than in general terms as being 'nice' or 'comfortable'. Certainly there are few, if any, comments on the artwork or cultural heritage. There are few comments around connections to other guests or the local area, be it places to eat or visit. The on-line research has found no evidence that guests are taking up the 'avatar' programme or creating new connections. This is not to say it may happen, but it is not discussed. Finally, there is no sense that the guest is engaged in ethical questions around their stay or how the operation is adapting to the climate emergency. There was one comment complaining about the lack of a plastic water bottle to which the hotel explained this was part of their commitment to reducing waste. This suggests that the demographic are not obviously engaged in the current brand values.

While the comments sections on key websites are only one way of gathering feedback, they are extensive and present a range of opinions as well as feedback from the management. Gathering the comments together it appears that the three most important issues for guests are:

- **Staff interaction**
- **Quality and choice of food**
- **Cleanliness and maintenance**

It is therefore useful to look at the brand messages that are used on the website which talk about:

- **Social by design / Social Avatar**
- **Networking**
- **Connected**
- **Unique experience**



On social Media platforms there is a limited take up:

- Instagram: often below 10 likes – some posts get up to 150 (9,489 Followers on 15.02.23)
- Youtube: few posts (6 in total with 75 subscribers)
- Linkedin: (11,233 followers) likes between 16 and 156
- Twitter: (555 Followers) Minimal engagement
- Facebook: Rating on 3.6 out of 5 based on 84 people. 72,346 Followers

ZONE Zone by The Park

Send Message

Photos

See all



Videos

See all



ZONEBYTHEPARK.COM

Zone by The Park

Hotel

Book Now

2

Like

Comment

ZONE Zone by The Park

10 February at 14:09 · 🌐

Nothing compares to the comfort we get when we are in our Zone. Have a blissful time with your loved ones and start your Valentine's day celebration early.

Call 1800 123 ZONE or visit www.zonebythepark.com to know more. ... See more

Amongst Barrenness Park Hotels Located

Instagram

Q Search

Log in

Sign up



ZONE HOTELS

COVID-19 UPDATE | HOME | OUR ZONES | OFFERS | XPERIENCE ZONE | GET SOCIAL | BOOK | CALL NOW : 1800-123-ZONE

Get Social

At Zone, the theory of friend-onomics comes into play. Tag us, share, connect, explore, tweet up, follow, post, repost and more on our social handles. For you are the best friend and guide for fellow Zone residents. Bring your social community to the Zone.

View all posts >



BAZAAR

ZONE



BAZAAR

ZONE



BAZAAR

ZONE



Instagram in particular is the place to be for hotels and travel brands given it has one billion monthly users and 500 million users of stories each day. Meanwhile, TikTok also has one billion active users, 61% of which are female. Social media can be a cheap and effective marketing method, especially if content is customer-generated. Many hotels are actively seeking to put a centrepiece in their lobby or common areas that is 'instagrammable'.

Looking at posts over the past six months (October 2023 to February 2023) it is clear that the same campaigns run across all channels. This does not suggest a targeted market profile, where the demographic for each platform has specific content. Looking at the subject matter, they tend to be promotional – a new hotel opening, a new menu, a special offer etc. This can be fine but reflects an old-fashioned view of marketing over promotion through engagement. Little material speaks to the guest experience or leverages guest feedback. Business is not that interesting in itself. There is also no engagement with the parent brand, The Park and their lifestyle heritage.

It is therefore useful to reflect upon the hotels mission as being a social catalyst and leader in networking with both the guest feedback and social media engagement. One explanation could be that there is generally a low take-up of hotel brands on social media in the region. However it is also worth considering that there remains a disconnect between the brands aims and the customer needs. Moving forward it will be critical to review the foundational claims of Zone by the Park and the more prosaic needs of the guest. It appears that the four-star market is predominantly for the internal market who are looking for great value and service, exceptional food and high standards of housekeeping. None of these are major differentiators within the market, so is the aspiration to be a disruptive change maker in the marketplace ahead of its time, or does there need to be a re-calibration of the core values? For instance the Zone website has a section for 'party animals', but it is unlikely this is a customer segment. The customer profile further suggests that the reasons they choose to stay with Zone is often based on the price, expectations on high levels of service and a general sense of what a four star product offers. There is little evidence of brand loyalty, though some comments refer to previous visits. In thinking about the future development of the brand it is recommended to commission a deeper customer engagement programme as well as facing up the challenges of an unstable world. This will not be business as normal.

Future Trends / Design

There is no doubt that the world remains gripped by the thrill of new, novel experiences and products whether in technology, experiences or design. The hotel is no exception. Add to this the allure of computer generated images (CGI's) to sell the idea to clients and customers alike. Across the globe images of new hotels have become an indicator of progress, excitement and spectacle. From contorted towers in China and Dubai to organic installations in pristine landscapes, we are bombarded by new concepts. Many of these are part of a larger development, adding a magnet for visitors with a disposable income, with flagship brands hotel brands leading the way. But are these shiny projects able to deliver in the long term?

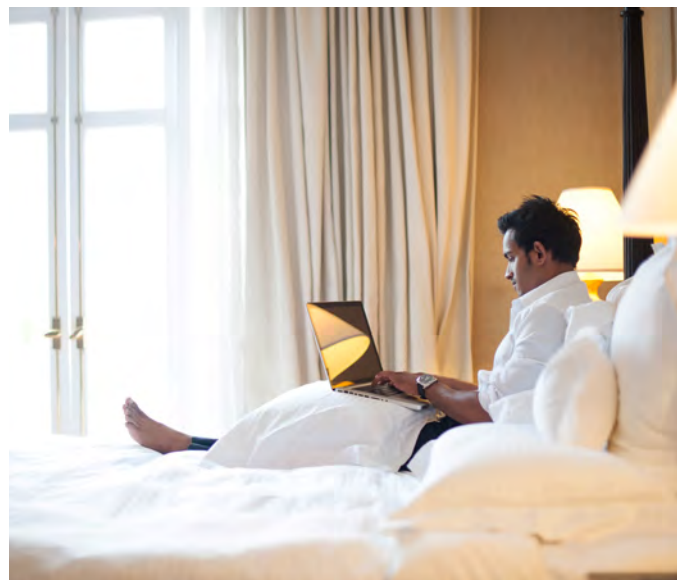
What does a 21st-century traveller want? They are seeking new experiences, whether through wellness, outdoor activities, gastronomy, or a specific interest like sports or music. They are traveling solo, with a group, or on business, and they might learn about a destination or travel brand via social media, rather than traditional marketing channels. Indeed there is a growing emphasis on handcrafted and locally sourced products in the hotel industry. The essence of the neighbourhood is reflected in every element of design and decor that encourages an immersive experience for luxury travellers into the local culture and ethos.

At the most radical end of the spectrum the NEOM project, in Saudi Arabia, is a city for 9 million inhabitants that is only 200m wide and 170 kilometres long including homes, hotels, schools and leisure. The project boasts that it will tackle the challenges facing humanity in urban life today and will shine a light on alternative ways to live. While it claims to be carbon neutral, critics have questioned this as well as the utopian vision for a hermetic development that isolates itself from nature. By contrast Raghav Modi suggests the best eco-friendly hotels in India are known to respect nature, engage with community, and care for every being in their surroundings.

When it comes to ideas of sustainability it is important to recognise that the change is not incremental or add on. It is not about doing the same thing, but just a little better. Rather it is a commitment to integrating circular thinking and regenerative design. This is where new can be transformative.

Future Trends / Bleisure Travel

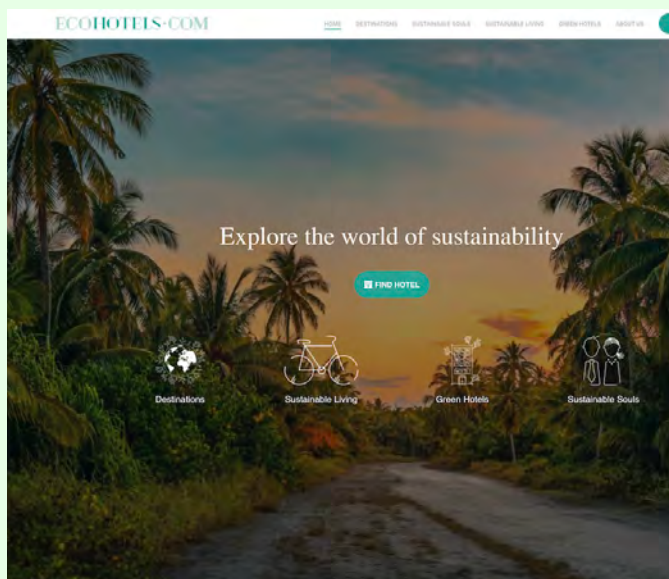
The blending of Business and Leisure travel is a long-term global trend that makes it easy for travellers to combine work and pleasure on their trips. This means decent work spaces in your hotel room, along with charging ports, quiet areas, and meeting rooms. A recent survey revealed that 41% of respondents are planning to combine their business trips with leisure activities in 2023. With increasing nomadic culture, work-life is no longer confined to offices. This creates new opportunities within the hotel for overlapping functionality, and services such as offering beverages and snacks throughout the day. Meeting rooms will tend to be less formal and more like a private lounge with comfort and good design taken as a given. While this is a foundational cornerstone for Zone, it is an area that can be developed to the growing needs of the modern traveller.



Future Trends / Ethical Travel

Recent research by Accor identified that for 48% of respondents, ethics matters in their interaction. The ethical traveller is a growing profile that wish to be sure their choices match their values which in turn means that the hotel needs to share their own vision and goals. As more and more young people become concerned with how environmentally friendly their travel and accommodation is, they are choosing brands that actively advocate for sustainability. Hotels are reacting by using solar power, conserving water, reducing plastic, adopting motion sensors, and adding meat alternatives to menus. It's what guests now expect so hotels need to join the sustainable movement. One way in which hotels can communicate with their guest is to use their green certification to be displayed by websites using low-energy design and code, indicating to guests how their brand genuinely commits to their sustainability goals. According to Abhijit Sunil, a Senior Analyst at Forrester Research, environmental sustainability is forecasted to be a strategic imperative for businesses in 2023. Being a part of this green revolution is not a marketing trick anymore, but a responsibility for hotels. There is already a growing number of eco hotels in India with The Hotel Journal highlighting choices across the economic spectrum.

Eco-conscious monitoring have also become cost-effective. Digitised cloud-based solutions to reduce wastage are already preferred over traditional ones. Utilising technology already on hand, hotels can use mobile devices that track carbon footprints to align their processes with sustainable development goals. Sustainable tourism is a measurable endeavour to lower carbon emissions and increase local income.



Future Trends / Staycation

This is an emerging trend where people stay at luxurious hotels to revive themselves and manage their stress in a 'peaceful getaway'. To cater to such needs, major hotel chains such as Marriott International, IHG Hotels & Resorts and Oberoi hotels are introducing staycation offers where guests can choose from a host of curated experiences, within the hotel. Over the next 10 years it is likely to become even more prevalent with travellers concerned over their carbon footprint and looking for a local escape. While in the local market there is already a tradition of hosting celebrations at hotels, the staycation is more about smaller groups of family and friends.

As an example in 2020, the Fern Hotels & Resorts, launched Fern Staycations - Vocal for Local - short getaways close to home, at 20 of their business hotels across the country. Hilton also announced the launch of its Staycation offer called Great Small Breaks across India. This trend is definitely an opportunity for Zone Hotels.



Future Trends / Luxury

While the four star hotel is never going to compete with the five or six star luxury properties, the sense of luxury is changing. For those without the income to splash out on a stay that is pegged to international pricing, the four star design-led hotel has much to offer this demographic. In this definition of luxury the hotel can offer new experiences, services and culinary delights. For some this may be about an escape from everyday life, for others even a digital detox. There is an intersection with the health and wellbeing traveller as well as the cultural adventurer. Hotels that offer a gateway into a city, town or community become ambassadors who can guide guests and curate itineraries which are personal and not always in the guidebooks. This is luxury as time, and something the Zone brand does. Over the next ten years it will be increasingly important to engage in these emerging ideas around luxury.



Future Trends / Escape

While the concept of the urban retreat is growing, so too is the escape destination. No longer labelled a resort, the new breed of design hotels understand their guests need for well-appointed rooms in a great, natural setting. The urban resort concept has been championed by high concept brands including Aman Hotels and Six Senses embracing the model as part of their growth strategy. The concept of getting away has a wide bandwidth and it is important that operators are able to cover all bases from the family who are looking for a holiday to those seeking peace and quiet. There can be a conflict between these market sectors where the notions of play and having fun can be disruptive in a negative sense. As a result the most successful properties are clear about their offer and are able to create separate areas for their guests depending on what they are looking for. Examples include family areas, pools that are adult only, a children's restaurant and good babysitting options. Even during the course of a day, the business traveller may be looking for respite, grabbing a moment alone or enjoying a refreshing drink in a conducive environment. Should there be an 'Escape Zone'?



Future Trend Food and Drink

One of the major challenges in the Indian market is to meet the expectation of the guest who often are looking for a huge choice and have particular tastes, which if not met feel short changed. While the buffet is always going to be at the heart of any restaurant, there are other ways of offering choice either through freshly cooked dishes (i.e. a la carte) or through rotation. The buffet can create a huge amount of waste if not carefully managed.

Hotels are increasingly adopting a farm-to-table policy to offer fresh and nutritious food to guests. Local farm produce should be preferred over pre-packaged food full of preservatives. Restaurant designs are slowly moving towards minimalism, simplicity and more sustainability. Minimizing food wastages can be an ideal determinant in measuring sustainability goals. There are also issues with offering an all year round menu with items that are not in season having to be flown in from other parts of the world.

As we have established India is home to one of the largest millennial population in the world. Consequently, it has resulted in the opening up of a number of bars and cafes, nightclubs, tea and coffee shops. The hotel industry needs to tap into these consumers who may not associate the hotel with offering these services. While room service and takeaways are increasingly popular, they produce more waste, so the use of suitable packaging that can be ethically disposed of is important. As consumers are questioning all aspects in their purchase, sourcing becomes even more central for hotels, especially in the food and beverage sector.

The challenge over the next period is one of education and informing guests of a sustainable philosophy which explains how choices and menus are being made. Instead of seeing this as a loss, it can be an opportunity to discover new foods that are local or in season. Why have Norwegian smoked salmon when you can have carpaccio of local fish? Instead of hard to grow strawberries, how about the spiralling green-pink pods of Jungli Jalebi grown in Kerala or tasty Mangosteen from the Nilgiri Hills?

A recent report from Hotelier India predicts a number of trends proclaiming that millet-based dishes will be the biggest and most popular food in 2023 with large hotel chains, such as Radisson, hosting specific campaigns and brunches featuring the grain. Veganism is on the rise, and while 'non-veg' has always been at the heart of Indian food, the interest in plant-based food is around taste, health and ethics. Chef Rakesh Sethi explains his team is noticing a shift towards healthy traditional cooking with the use of ghee. Awareness and the importance of rotation of dietary fats in daily cooking and its benefits are gaining momentum amongst chefs. He speaks of the growing interest in regional cuisines and the delicacies from Northeast India in particular.

When it comes to drinks and beverages the local markets for tea, coffee and infusions is ever growing. There are also suggestions that connoisseurs are making continuous efforts to create great home-grown Indian liquor, such as Baijiu, Lambanog and Laksoy, and wines meaning that foods being paired with Indian spirits and indigenous liquors can take centre stage. Sandeep Kalra, from the Pullman New Delhi, notes that fermented beverages and skinny cocktails have gained popularity due to the amount of health benefits they offer. The lack of health benefits in sugary fizzy drinks has been highlighted in recent years, with customers eager to try alternatives.

Technology continues to transform the dining experience with QR codes replacing traditional menus. From ordering food to paying the bill the guest does not have to touch their wallet. Notwithstanding the rise of smartphone connectivity and ownership, there are still guests who prefer browsing a printed menu and who are suspicious or worried about cyber security; hotels need to offer choice.

Overall the trends can be summarised as using fresh ingredients with authentic cooking methods that respect the products. Sustainability and traceability will be part of the menu to become the norm. Shorter menus that are less labour, wastage and energy intensive will make efficiency a vital feature. Finally, plant-based dishes will be strong as healthy while calorie-conscious menus are still on the rise. The Bazaar restaurant concept is well placed to embrace these trends.







Future Trends / Health and Wellbeing

With its ancient healing traditions and spiritual practices, India has long been heralded as the ultimate wellness gateway. Globally wellness as a movement is transforming into a \$1.5 trillion market. Better health, the most traditional category associated with wellness, extends beyond medicine and supplements to include consumer medical devices as well as personal-health trackers. Consumers are increasingly taking their health into their own hands with targeted, data-driven care apps. Many struggled to maintain pre-COVID-19 fitness levels when they are unable to go to their gyms as frequently or participate in sports in the same ways as before. Hotels are able to offer facilities, mentoring and training. From the much-loved jogging machine to free weights and yoga mats, guests are looking for a well designed environment in which they can maintain and enhance their fitness. The outdoor hotel trend is gaining momentum as hotels are being designed around outdoor activities like hiking, biking, kayaking, and more.

Better nutrition has always been a part of wellness, but now consumers want food not only to taste good but also to help them accomplish their wellness goals. Many adopt nutrition apps, diet programs, juice cleanses, and even subscription food services. It is not just about calorie counting, but a matter of trust – that the food they order really is good for you.

The other side to this trend centres around achieving a healthy appearance which starts with fitness but covers clothing, ‘athleisure’ and beauty products or procedures. Hotels are therefore in a prime position to offer service-oriented offerings from spa treatments to personal grooming, hair care and make up. It is worth noting that the Medical Tourism sector in India is expected to increase at a CAGR of 21.1% from 2020-2027. However, it is unlikely that the Zone brand would be a choice for this sector.

A good night’s sleep is a basic requirement for any guest, but how can a hotel help those who have trouble nodding off? Traditional sleep medications such as melatonin are only one way. App-enabled sleep trackers and other sleep-enhancing products such as blackout curtains and gravity blankets and pillow choices are all aspects that the hotel can assist with. Of course preventing sound travelling is key, and something that many hotels have found challenging. It requires scientific input as well as careful monitoring during the construction.

The rise in mental health awareness has also soared post-covid and will continue to be a societal issue for decades to come. While there are clearly medical and psychological needs, an interest in mindfulness has gained traction. Whether in the form of meditation-focused apps, classes or simply being in nature, the hotel is in an ideal position to help guests on their journey.

At Zone there is a spa concept and a small gym. It would be useful to understand how well this is used and whether guests appreciate the amenity and what they would like more of?



Future Trends / Transformative Travel

Transformative travel is the concept of travelling to find a new perspective or to undergo some self-reflection. It connects wellbeing with self-discovery. New concepts are being generated on the basis of creating stories and narratives. Instead of one destination and experience to change perception, a new trend is about multiple linked chapters taking a traveller through an emotional saga of transformation. By blending storytelling with wellness experiences the emotional power can be much stronger. In this situation the wellness and the art/performance are happening together – like soaking in hot springs while taking in a play or meditating in the galleries of art museums.

As Zone branches out into the leisure market these facilities are increasingly important.



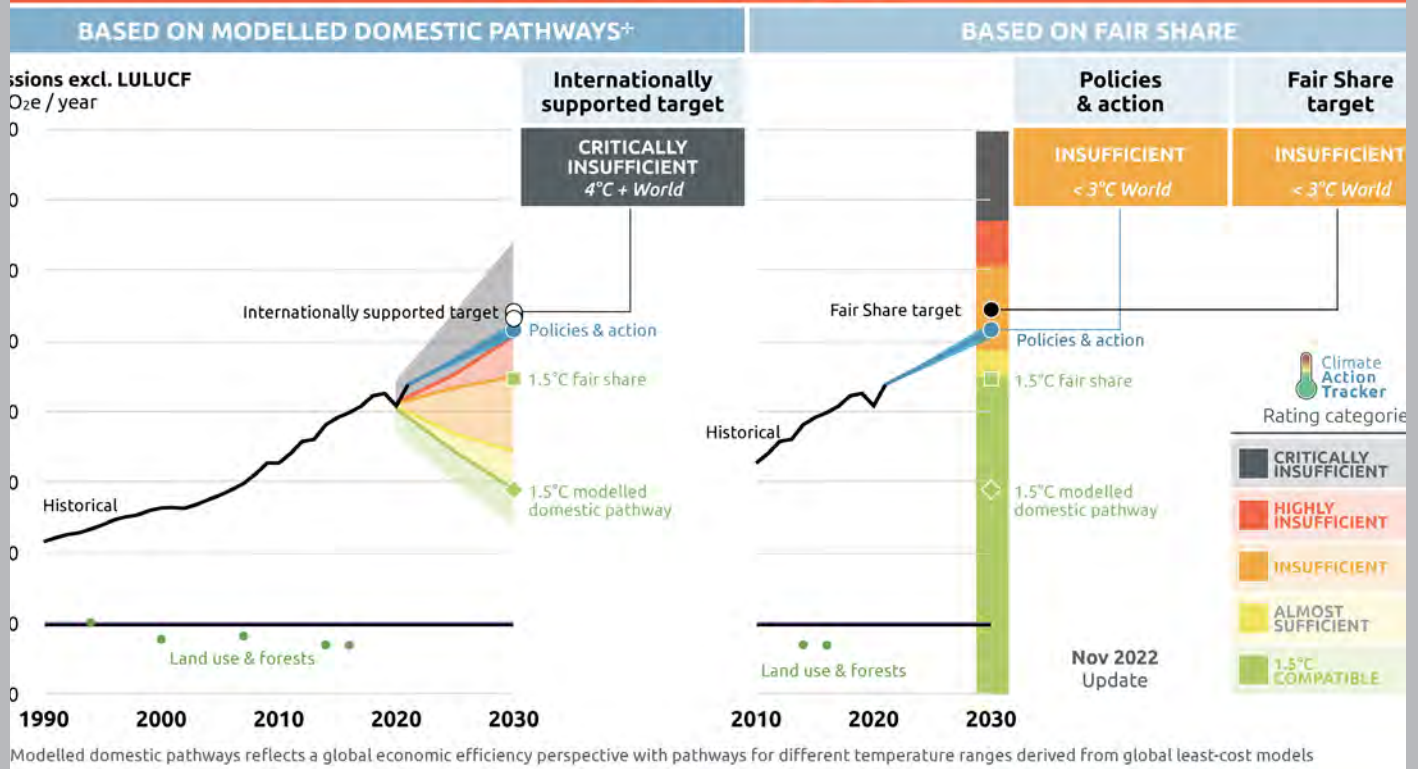
Future Trends / Risks

The Climate and Biodiversity Emergency is the most disruptive global force at play over the coming decades as systems recalibrate through choice or circumstance. The Indian Ministry of Tourism Conference (April 2023) has a day dedicated to 'Towards the net-zero transition of Travel & Tourism and Building Smart Hotels for Tomorrow: Leveraging the role of innovation and investments in changing the face of Hospitality Industry'. This illustrates just how pressing the issue has become. Without radical change it will not just be the hospitality industry that suffers. Indian cities are exposed to multiple climate impacts connected to heat stress and flooding, which amplify the challenges caused by other factors such as poverty and rapid growth combined with scarcely managed urbanization. Therefore futureproofing existing buildings as well as all new buildings is critical.

One of the features of modern construction is the proliferation of fully sealed buildings. This means that all inhabitants depend on receiving clean air is dependent on mechanical systems. In the event of extended power outages and unstable energy delivery, the operation of the hotel becomes impossible. It is therefore advisable to consider how buildings can rely less on mechanical ventilation and fossil fuels.

Connected to the consequences of the climate crisis is geopolitical stability. As a populous and powerful country, there are many future scenarios that might exacerbate disruption including rising sea levels and drought that will create mass migration. This could also affect food and water security; without which hotels are unable to operate. The more the building is able to generate its own power, filter water and maintain service, the more resilient it will be.

INDIA OVERALL RATING HIGHLY INSUFFICIENT

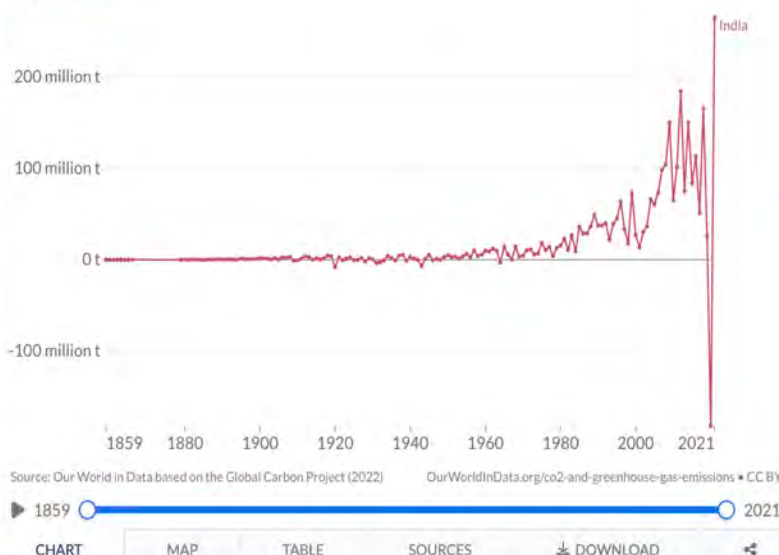


India: Year-on-year change: what is the percentage change in CO₂ emissions?

Year-on-year change in CO₂ emissions

Absolute annual change in carbon dioxide (CO₂) emissions, measured in tonnes.

[+ Add country](#)



This interactive chart shows the year-on-year growth in annual CO₂ emissions.

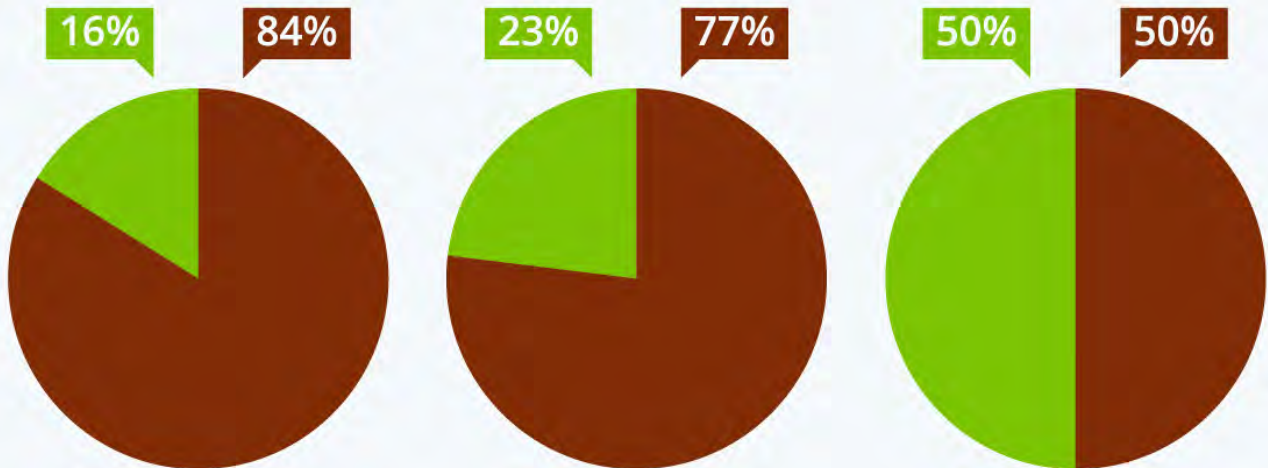
- A positive figure indicates that the emissions in a given year were *higher* than the previous year.
- A negative figure indicates that emissions were *lower* than the previous year.

Year-to-year changes in emissions can vary a lot – this can create a particularly 'noisy' time series.

India's Electricity Mix

Electricity generation by source in India
in 2010, 2020 and 2030*

● Fossil fuels ● Renewables



India Hospitality Market Competitor Analysis

The report on the Hospitality Industry in India covers the major international players and the leading domestic players in the hotel and hospitality industry in India. The hospitality sector in India is dynamic and emerging. It holds greater potential to grow for both the national and international players who are interested to enter the Nation's hospitality industry.

India Hospitality Market Top Players

- 1 Oberoi Hotels & Resorts
- 2 The Park Hotel
- 3 ITC Hotels
- 4 Lemon Tree Hotels
- 5 Taj Hotels

*Disclaimer: Major Players sorted in no particular order

Market Concentration



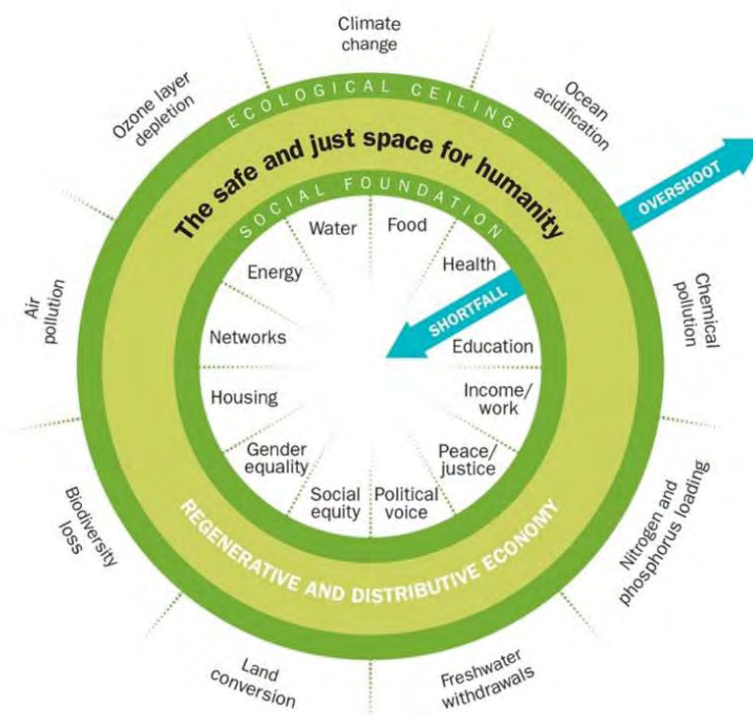
Opportunities / Circular Economy

The Circular Economy aims to eliminate all forms of waste from the system – i.e. the inefficient utilization of resources or assets. It is a restorative approach to production and consumption that involves redesigning, recovering, and reusing products and materials to reduce environmental impacts. Circular models seek to eliminate four different kinds of waste:

1. Wasted Resources: Materials and energy that cannot be effectively recycled over time
2. Wastage Capacities: Products and assets that are underutilized
3. Wasted Lifecycles: Products that prematurely end due to planned obsolescence or a lack of second-life options
4. Wasted Embedded Values: Components, materials, and energy not retrieved from waste streams

The transition to a circular economy could result in an additional US\$ 4.5 trillion in global economic output by 2030. Moreover, in contrast to the current growth environment, India's circular economy development route might generate an annual value of US\$ 218 billion (Rs 14 lakh crores) by 2030 and US\$ 624 billion (Rs 40 lakh crores) by 2050. The implementation of a circular economy in India would require an enabling ecosystem that encourages the identification and adoption of new business models. Presently, 377 million people living in urban cities, produce approximately 55 million tonnes of Municipal Solid Waste (MSW) including organic waste, recyclables such as paper, plastic, wood, glass, etc. per year, with these numbers expected to skyrocket to 125 million MT per year by 2031. Moreover, only 75-80% of the MSW gets collected; out of which only 22-28% is processed, and the rest is dumped in dump yards. MSW generation is projected to increase to 165 million tons by 2031, and further rise to 436 million tons by 2050.

The concept of the Circular Supply Chain proposes materials that are fully renewable, recyclable, or biodegradable and can be used across lifecycles. Recycling, refurbishment, and restoration initiatives can help a hotel business to recover value from end-of-life products. In 2023 the on-line magazine Dezeen reported “Upcycling is going to be a mode of production to which an increasing amount of artists and designers will be turning globally”.



Carbon Neutral Design

Carbon neutral design is a blanket term that encompasses the total carbon cost of any construction including the materials used, where they come from, the energy during use and that used in order to disassemble the building. Within recent years the ability to calculate this information and monitor energy in real time means that it is possible to make design decisions at the beginning of the process. Taking this further, there is a movement to create 'material passports' so that when it comes to a major retro-fit or decommission, the building can be disassembled and the components reused to build the next version. Modular construction is a relatively newer trend that is picking up pace and in some cases is a perfect way to meet the targets. In the future the aim is to propose carbon positive designs where the building actually produces more energy and resource than it needs so is able to sell it onto others. As important is insisting on the use of locally available materials and crafts, which add to the story behind the hotel. The optimum orientation is critical to maximise sunlight and shade where required.

LEED Certification (Leadership in Energy and Environmental Design) is a globally recognised certification that measures the eco-friendliness of a building. The assessment covers harnessing renewable energy, recycling water, treating solid waste, sourcing consumables locally and eco-sensitive architecture & design. In the region ITC hotels claim sustainability is the bedrock of all their operations making them one of the greenest hotel chains in the world to receive the coveted LEED Platinum Certification for all hotels.

While not on the scale of a hotel, the use of natural and bio-materials is making a comeback. Emerging Indian practice Sketch Design Studio have designed a house where walls are made in rammed earth using mud from the site mixed with natural binders like lime and fenugreek seeds. Edibles like jaggery and a popular Indian medicinal leaf, neem, were also added to the mix and act as natural insect repellents. At the same time, the mortar used for the stone masonry is a waste product from lime kiln use, called bagra.

Finally, the consideration of how to maintain and repair a property is being re-thought so that all services are fully accessible, workshops with spares are properly designed into the building and that the skills necessary to undertake small and large repairs are retained.

The Five Foundations of Zero Carbon Building Policies



Green Energy

Hotels can utilize solar power either by generating power from their own solar panels or by purchasing solar power from their green electricity provider. Efforts to minimize water usage can help a hotel become more green, from implementing slower-flow showerheads to using more efficient laundry machines. It is possible to conserve energy by implementing motion sensors that will turn off the power once no motion has been detected for a certain period of time. New eco-friendly systems for waste disposal by introducing recycle bins in guestrooms and compost bins in F&B outlets are recommended.

Green Environment

It is now accepted that the loss of biodiversity and nature is the result of a man-made world. Many call this the Anthropocene era; an epoch of geologic time, used to describe the most recent period in Earth's history when human activity started to have a significant impact on the planet's climate and ecosystems. This means that in designing new buildings and infrastructure we need to recognise the role of all living beings and plant life. Anything that is taken away must be replaced. While the Asian Hotel is often characterised by an exotic setting, this comes at a high price with toxic chemical sprays being used to kill mosquitos and other insects. These are deadly not only for the intended victims but also for those around. The challenge therefore is to create a bio-rich environment which does not harbour danger and is truly natural. Ideas around the concept of a garden have shifted away from the fully manicured and maintained environment towards a wilder and more nurturing landscape. Historically the Mughal gardens were meant to support themselves and they planted trees that produced fruit for market which could translate to the hotel. This can also apply to the growing of herbs and spices in order to create a productive garden. India has vowed to have a third of its total land area, or 95 million hectares, under forest and tree cover by 2030.

Developing usable space on the roof of the building instead of just around it is a way to introduce the concept of landscaping into the property. Some hotels are even growing produce on the roof of their buildings in order to bring freshness, beauty, and a sense of ecological responsibility together.

Another possibility for Zone is to design lobbies filled with plants and guestrooms with a connection to nature. This green zone not only is beautiful to look at, it is recognised that immersion in nature can reduce stress levels and restore a sense of connection.



A/CIE UPDATE
& Architecture Design Series

Panellist



Ekant Singh
Founder & CEO,
Page2813.



Tushar Mistry
Principal Architect,
Tushar Mistry Design Studio.



Nirav Saraiya
Director,
Vivoan Water & Enviro
Solutions PVT. LTD.



Dr. Mala Singh
Founder & Director,



Priya Malik
Co-Founder &

DESIGNING SUSTAINABLE INDIA

PRIME MINISTER

NARENDRA MODI

INAUGURATED

WORLD SUSTAINABLE DEVELOPMENT SUMMIT 2021

REDEFINING OUR COMMON FUTURE:
SAFE AND SECURE ENVIRONMENT FOR ALL

February 10-12, 2021 | New Delhi, India

teri





Art and Culture

Tapping into local culture is one of the most powerful ways of being authentic and creating a unique experience. Historically with the rise of the chain hotel, brands such as Hilton prided themselves in providing the same room design globally to ensure their guests were never disorientated by a new location. Today this thinking has been reversed, with guests seeking a place-based stay. Culture can be defined as a way of life, especially the general customs and beliefs, of a particular group of people at a particular time. By tapping into local know-how and histories, a hotel can become more rooted in a place and offer a range of experiences from cuisine to design that reflect the setting. In turn this gives the guest new memories, as opposed to the tendency of globalisation for all experiences to merge into one. Needless to say there is a whole industry around Hotel Culture that utilises platforms such as Instagram to share images and interviews. The new traveller is looking for an authentic experience of place and destination. They want to learn more when they travel and help communities while preserving traditions. Therefore the decision of where to travel and with whom is increasingly linked to social responsibilities, cultural values and environment preservation.

The role of art is to animate the space, provide interest and be part of the design scheme. However it can go a lot further than simply adding a layer to the décor, and become part of the storytelling. The commissioning of artists to produce wall art is fairly standard. Yet this is only the beginning as we do not have to think only of pictures that are framed. Other commissions can include external sculptural elements, video art, installations and the design of special pieces of furniture. There is a trend in five star hotels to include a gallery not simply as a retail space, but as part of the DNA of the hotel. While unlikely to be an initiative for the four star market, it serves to demonstrate the importance of artwork to guests. Taking it further there are hotels, such as the Nhow brand, that commissions temporary artwork so that returning guests have a new perspective.

It is clear that both the PARK and ZONE have an engaged policy of using art and working with creatives to achieve a strong identity. Thinking ahead it may be interesting to see how this tradition can be enhanced. There could be an on-line gallery showcasing the work and artists across all the properties, or there could be a scheme to swap artworks from one hotel to another.

Storytelling

Good hotel storytellers online are moving away from standardised text and descriptions of amenities, towards the use of big, beautiful, bold images with captivating narratives and compelling mini videos, more fitting to today's multi-device, multi-channel universe. Nicolas Audiffren suggest that storytelling is a marketing strategy designed to engage your clients through communications based on the telling of an authentic and realistic story. Moreover, storytelling communications allows you to attract attention, seduce and convince through emotion. Adding to this the website asksuite suggests that stories help consumers place products and services in the wider narrative they're constructed around the world – it provides structure to the way they integrate value and meaning. They are living tales that can connect with your audience on deep and long-term levels.

The themes tend to be around: history, nature, design(er), experience, culture, people and innovation. It is also important to share guest stories, not in terms of their reviews, but as part of a digital guest book where you can curate recollections and photos. Find authentic stories connected to the hotel and promote them on the right channels. 'However, storytelling does not need to be limited to oral recitation. It can take form through drawings, paintings, dance or even puppet shows. India's storytelling traditions are as diverse as the culture of the country.'

The new player to the 3 star market, OYO, offer budget rooms with a reliable booking system. They also have an impressive website offering tips for travellers and story sharing. OYO majorly caters to urban domestic travellers where traditional and emerging themes of tourism include; nature, heritage. culture, religion, adventure, medical and wellness.

PRIYA PAUL AT THE CLUSTER

The Priya Paul collection is an initiative through which the Cluster „Asia and Europe in a Global Context“ tests the ground of the visual and multi-media agenda of the Heidelberg Research Architecture (HRA). Located in the Cluster's Research Area B „Public Spheres“, its aim is to better understand how images help us to grasp the impact of transcultural flows between Asia and Europe, how they circulate through and constitute different public spheres and how the asymmetric relations that characterize these flows are evolving over time and across space. Research Area B counts among its members scholars from a wide array of disciplines and areas of study. The Priya Paul Collection offers a great variety of sources which will provide a unique insight into new spheres on these transcultural flows between Asia and Europe.

CONTACT

Christiane Brosius, Heidelberg University
brosius@asia-europe.uni-heidelberg.de

Sumathi Ramaswamy, Duke University
sumathi.ramaswamy@duke.edu

Yousuf Saeed, New Delhi
tasveerghar@gmail.com

For further information on the Cluster "Asia and Europe in a Global Context" please visit www.asia-europe.uni-heidelberg.de.

Cover picture: A lady with a telephone. Textile label of Meyer Sassoon & Company Ltd., Bombay, ca.1930.

Interior image: Man with sarangi standing on a globe. Textile label of G.G. Company, 1920s.

Reverse side image: Snow landscape on Eid greeting card (Muslim New Year), 1940s.



THE PRIYA PAUL COLLECTION OF POPULAR ART

A Special Collection of the Heidelberg Research Architecture (HRA)
Research Project B4: Transcultural Visuality Learning Group



Community and Local Connections

There are a number of communities to consider here: the guest, the staff and the local community.

In an effort to build a sense of community in lobby areas, hotels are becoming more creative with the types of public spaces offered, from shared workspaces to kitchens to game rooms.

In considering the wider local community it is important to see and share the role of small businesses and suppliers struggling to keep up with 'the new normal'. The Better India project tell stories of change, inspiration, courage, resilience, hope, kindness, compassion, innovation, initiative, sustainability, progress, social good, small businesses, renewable energy, green technologies, and much more. They talk about harnessing the power of digital media and positive storytelling to showcase the journey of India's most inspiring individuals and institutions. They say 'we drive our audience to turn this inspiration into impact!' They also partner with brands to drive campaigns that make a real difference on the ground and are committed to showcasing constructive work being done in India and thereby advancing the impact ecosystem at large.

Hotels that have a strong sense of place in are able to offer the true essence of a destination though creating porous connections between the traveller and the place. This means reaching out to local culture and bringing culture back into the property. By instigating a dynamic network of grass roots collaborators within the vicinity of the property, the hotel can highlight best kept local secrets and offer personalisation.



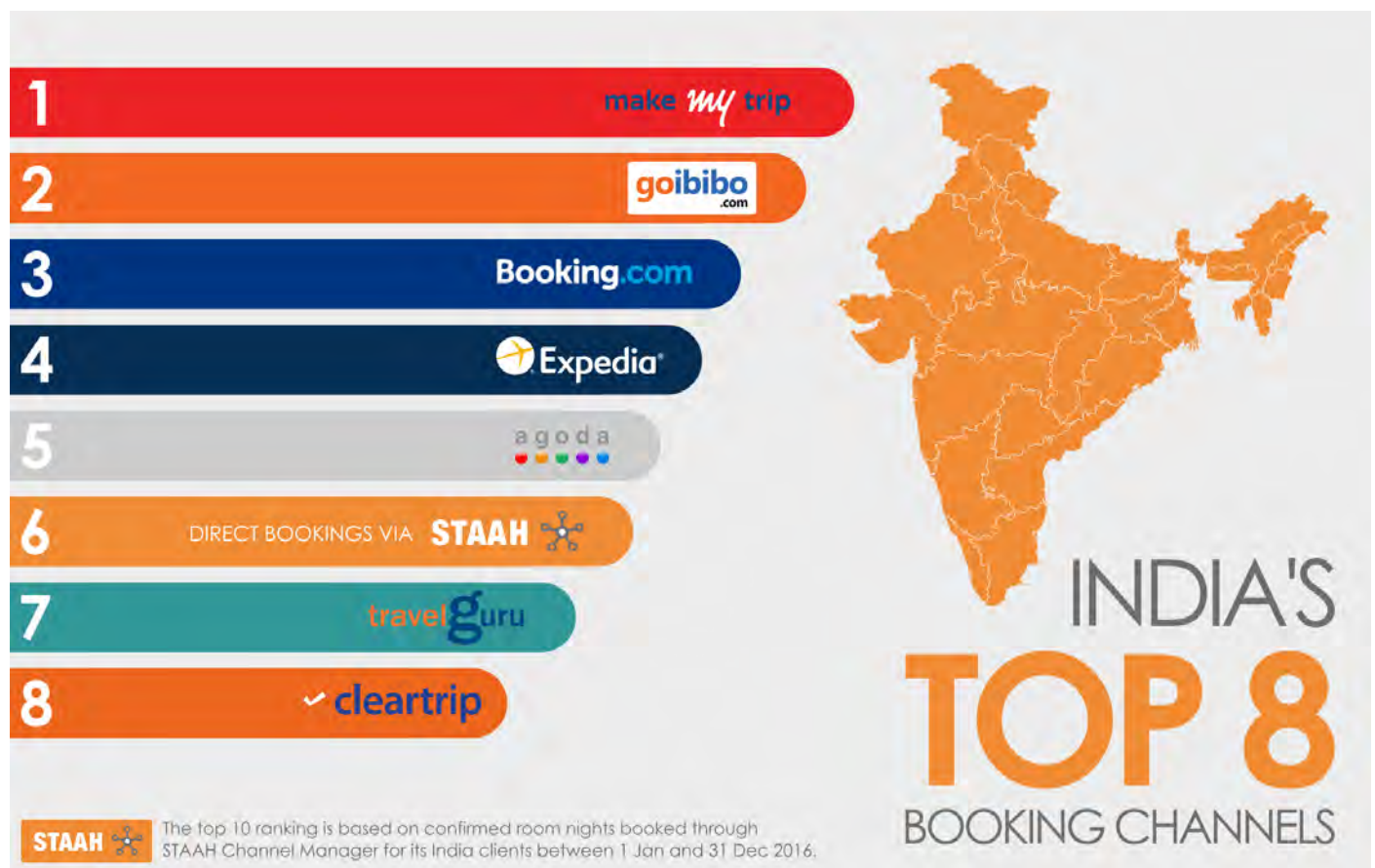
Technology / Introduction

Technology should not be confused with progress....

Technology is advancing to the point where no trip or experience is without it. Artificial intelligence can be used for pricing rooms, to checking-in guests, to online help, room service, and more. Transport technology is being upgraded, search engines can now be voice operated, and there is a mobile app for everything. Most guests in the four star sector will have access to smart phones and the internet, but not all. The argument is that technology makes it much easier to personalise the guest experience and remember their preferences. Mobile capabilities means allowing guests to check-in remotely, access their rooms with mobile access, and order room service at a minimum. On the other hand, the guest still values personal interaction, so it is important to understand the key interfaces.

For the hotel this means website content needs to be mobile optimised. This could include moving away from longer form content, towards content that can be more easily displayed on and consumed via a smaller mobile screen. Booking engines need to be mobile-friendly, and mobile check-ins can be helpful in certain scenarios. It is important to embrace Generation Z (young adults born between the mid-1990s and early 2000s). These young people are “digital natives,” meaning they’ve never lived in an age without the internet, and their views and habits around technology use and social media are different than those of older generations.

Finally, the construction and running of the building and associated infrastructure relies on technologies from calculating the design to measuring capacities in operation. The focus on creating green buildings has seen the development of new useful tools that assist in decision making and operations from conception to completion.



Technology / Booking

Moving from manual management to automated, cloud-based, software has allowed hoteliers to save hours of time, boost revenue, gain access to priceless data and performance metrics, and enhance guest communications and experiences. When it comes to physically checking in, automated services are only successful where express check in/out is preferred or as we saw during the pandemic due to limited person to person interaction. In the Zone brand the focus on technology tends to centre around communicating rather than efficiencies. Therefore it is likely that Zone tech will concentrate on making the management of a stay more frictionless and flexible. Connected to this is the importance of loyalty schemes and what this could mean for future programmes and technologies?

Technology / Personalisation

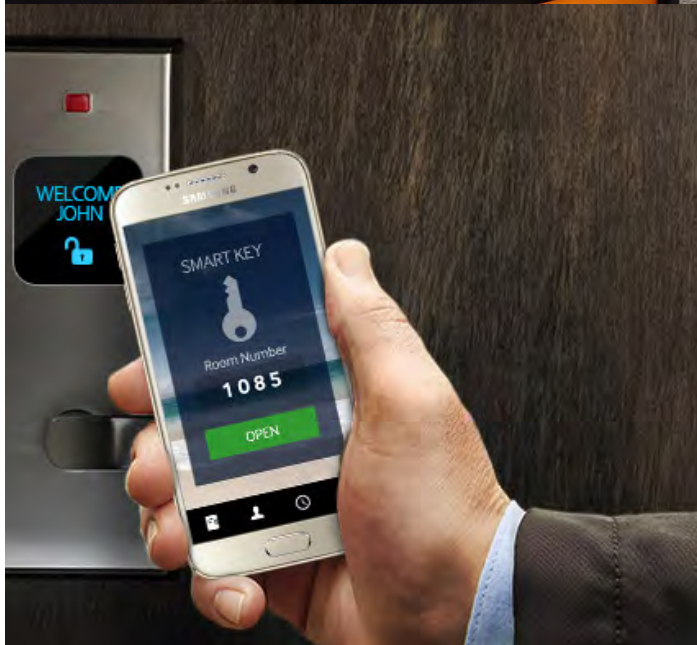
Personalisation is a major trend in the Hospitality Industry primarily driven by the rise of big data. Meanwhile, a growing number of hotel guests want to be treated as individuals, rather than just another anonymous customer. Personalisation can be deployed in a variety of ways. Within hotels returning customers can be automatically provided with similar services to last time they stayed, while they can also be personally greeted by a member of staff upon arrival, using GPS technology and booking data. With the rise of smart devices, hotel guests can also be enabled to use their own devices and accounts on entertainment platforms. If adopted this has to be done with precision and care – there is no room for error.

Technology / AI

Chatbots are now an established feature of customer service. Very few websites now don't involve some kind of interaction with a notification pop-up asking if you need assistance. In hospitality, this trend is especially strong, where 24/7 support is often required. This type of artificial intelligence is helping visitors with their enquiries, processing bookings, and checking guests in and out. Coupled with this is recognition technology which allows guests to enter their room, or even check-in and out, via face or fingerprint recognition. This kind of enhancement to guest experience could be a point of difference to the hotels that implement it first. Again it should be said that this is not a replacement for a human voice, but rather an additional assistant.

Technology / F&B

Having as much personal data on record at the front desk as possible could help hotel staff deliver memorable and personalised experiences. For instance if a guest mentions they have an allergy, this can be flagged up to all F&B outlets. It is also an opportunity to curate a room service menu just for them. Of course the ability to book in advance is useful, though often the hotel guest will have an expectation that because they are staying, they will have access to all areas and will not have to book. This needs to be managed by the hotel to avoid disappointment.



Technology / Choose your room

With services such as Hilton's digital check-in, guests can choose their specific room before arrival, just like selecting a seat on an airplane. A keypad code, a digital version of a room key, or an app on a smartphone eliminates the need for physical room keys and streamlines the check-in process. This can be helpful to business travellers who are checking in late or checking out early. Again it is likely to offer these kinds of services in addition to the human touch.

Technology / Robots

Within the hotel setting, robots have been used to offer room service and perform cleaning and other housekeeping chores. Meanwhile, restaurants can potentially use robots to carry out aspects of food service. There is a mixed reaction to this trend and some see it as a gimmick. Given the local context it is unlikely that this will be acceptable to guests and therefore should be ignored.

Technology / Voice Technology

With the amount of data in the world, voice search is another aspect with the potential to really narrow things down. Amazon's voice assistant is now in hotels, from chains to vacation rentals. The system can be customised to include key guest information, like checkout time or pool hours; allows guests to request services like housekeeping or room service; and can be configured to control "smart" hotel room functions, like adjusting the thermostat, controlling the TV and entertainment systems, or raising the blinds. However, the greatest impact may come from travellers using Alexa in their homes to find them a hotel, or organise a trip. In room smart speakers can also provide guests with answers to questions and respond to voice requests to turn on lights and devices within the room. Again the challenge is to weigh up the cost of investing in a particular market-led platform, knowing that it will change over the next 5-10 years.

Technology / Charging

Wireless charging transfers power from a charging mat to a device like a smartphone or headphones, when the device is placed on the mat. These can be discreetly installed around the hotel. The other issue is connectivity and the broadband speed. The future is 5G and free connection.



Technology / Social Media

Since the launch of Facebook and other social media platforms, the power to influence travellers has increased exponentially. The amount of media that can be pushed to global audiences is vast and extremely incentivising. Brands can market much better and are constantly finding new ways to use social media to collect loyal customers. Meanwhile, when travellers share videos and photos of their trips with friends and family, this is one of the most impactful factors in inspiring others to take a trip. The other advantage of social media's growing dominance is that it makes your property available to travellers 24/7 along with chatbots and automated messaging.



**TOP INFLUENCER
MARKETING AGENCIES
IN INDIA**



It is important to consider how you communicate with guests. Is it fun and playful, relaxed and conversational or professional? Working out the tone of voice that best suits your brand is therefore key in moving forward. Currently Zone has a very casual voice and yet the guest seems quite traditional. What is the best fit looking at the future of the brand?

The Future...

In this survey of trends and futures in the Indian market, Zone Hotels finds itself in a strong position. It has a notable identity, is embracing technology and uses design as a differentiator. However, the next ten years will inevitably be a time of more disruption and change so it is critical the hotel brand is resilient and agile with the ability to look after its guests and employees with care and respect. The following five key attributes should be the focus:

- 1. Leading the way / Original and compassionate**
- 2. People and the Environment first / Caring about our planet ethically**
- 3. Inspiring Change / A cultural force for good**
- 4. Immersive Design / Using design to tell new stories**
- 5. Curated technology / Adventurous and safe**

Looking at guest feedback it is clear that service, cleanliness and food choice come out on top. In many ways these could be considered base-line, and the brand needs to elevate its own values and identity to ensure it is able to remain relevant and inspiring. India is a global test bed for state-of-the-art social media marketing which taps into key trends of post-materialist luxury, visible sustainability, craftsmanship of care all through harnessing the smartphone booking boom.

For design, the future is more likely to be influenced as much by the quality of materials as aesthetics. Working in existing buildings and 'retro-fitting' is much more green and potentially more interesting than another new-build box. There is also a growing sense that for those trying to make a difference, the use of upcycling and repair will result in a more patchwork aesthetic. In turn this creates a positive feedback for storytelling and appealing to the growing younger end of the market. The material is also silent on the origination of any of the design or artwork which seems strange for a brand that is proud to be design led. There is the opportunity of deeper research into the sourcing of locally made products and crafts to reduce transportation

and carbon as well as engaging in local markets. The current portfolio is extremely diverse so it will be important to establish the vision as a thread that weaves through the brand.

The future success of the brand relies on:

- **Clear sustainable vision**
- **Brilliant communication with guests**
- **Flawless service**
- **Intelligent and well maintained buildings**
- **Appropriate technology**
- **Innovative storytelling**
- **Culturally rich and diverse**
- **Investing in the local**
- **People first**
- **Surprise and delight**
- **Green to the core**
- **Food and drink that improves the soul**
- **Playful and inspiring designs**

Reinforcing the meaning of ZONE

An area or stretch of land having a particular characteristic, purpose, or use, or subject to particular restrictions.

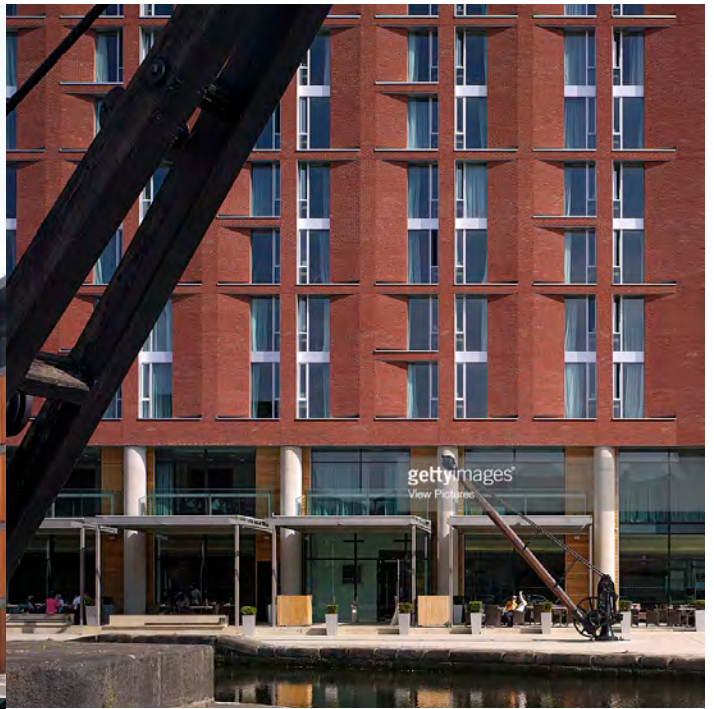
A well-defined region extending round the earth between definite limits, especially between two parallels of latitude.

A range of longitudes where a common standard time is used

A state of such concentration that one is able to perform at the peak of one's physical or mental capabilities (eg in sport)

An encircling band or stripe of distinctive colour, texture, or character.

STEP INTO THE ZONE



Future Materials





locke



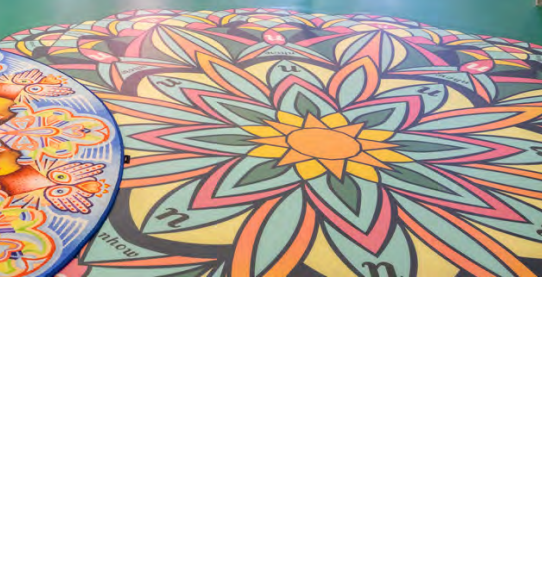


MOXY

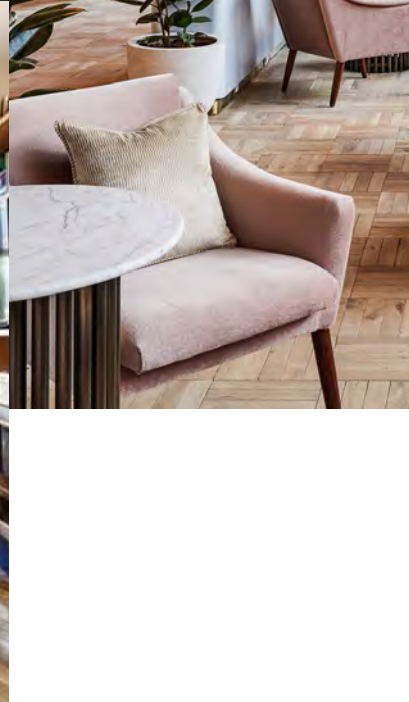


mox-hotels.marriott.com



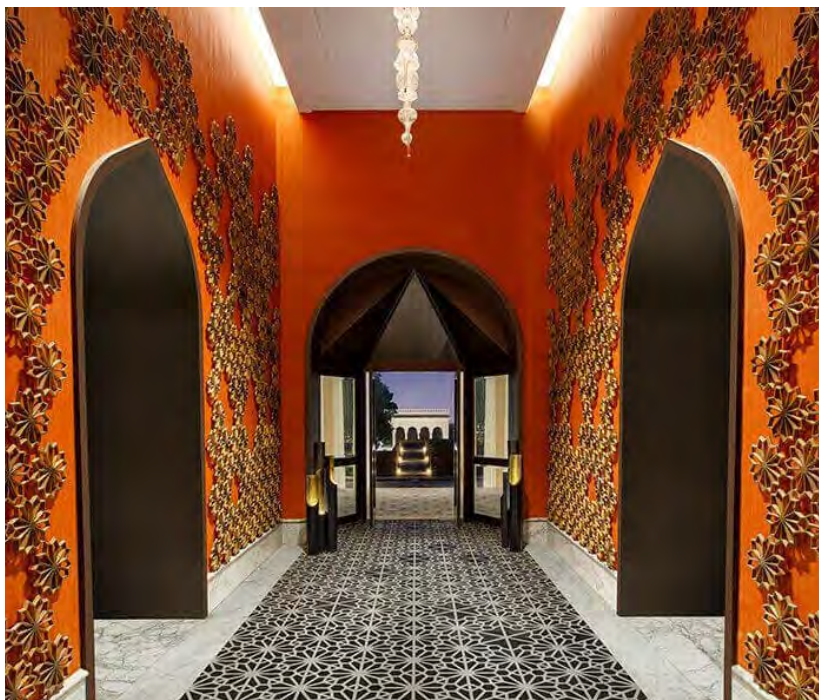


www.nhow-hotels.com



HOXTON





ITC WELCOMHOTEL

