



TAP DESIGN CONSULTANCY

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THE BUSINESS VALUE OF HOSPITALITY DESIGN

We are TAP

We reimagine brand experiences that begin and end with people.

By expertly integrating brand, environment, digital strategy and design, we craft purposeful connections that shape culture and elevate your brands impact.

EXPERIENCES, REIMAGINED

STRATEGY | DESIGN | EXPERIENCE

WHY THE HOSPITALITY EXPERIENCE MATTERS NOW

The global hospitality industry has entered a new era of opportunity and complexity. After a period of disruption, the sector has not only recovered but surpassed previous benchmarks, with global hotel revenue reaching \$406.5 billion in 2023 and travel activity rebounding to 1.1 billion international travellers in 2024. Beyond economic growth, hospitality's influence is cultural, shaping how people connect, unwind, and explore the world.

Today, hospitality brands are more than service providers; they are experience curators, responsible for creating spaces that feel human, authentic, and future-ready.

Those who invest in experience led thinking will not only thrive but define the next chapter of global travel.

"As guests demand more flexibility, personalisation, and sustainability, the design of these experiences has become a strategic differentiator."



GLOBAL TOURISM HIT 1.1 BILLION INTERNATIONAL TRAVELLERS IN 2024, AN **11% INCREASE** OVER 2023, SIGNALLING STRONG SECTOR RECOVERY SINCE COVID

UNWTO, 2025

78% OF TRAVELLERS PLAN TO STAY IN SUSTAINABLE ACCOMMODATIONS IN 2025

Booking.com, *Sustainable Travel Report*, 2024

57% OF TRAVELLERS SAY A MEMORABLE EXPERIENCE IS MORE IMPORTANT THAN COST SAVINGS WHEN CHOOSING ACCOMMODATIONS

American Express, *Travel Trends*, 2024

92% OF GUESTS WHO HAVE A POSITIVE EXPERIENCE BECOME REPEAT CUSTOMERS OR RECOMMEND THE BRAND

Deloitte, *Hospitality Survey*, 2024



EXPERIENCE IS THE DIFFERENTIATOR

THE FUTURE GUEST EXPECTS MORE

Modern travellers expect more than convenience, they expect their stay to feel unique, intentional, and (hyper)personal. Gen Z, Millennials, and the rising Gen Alpha segment are driving a shift from transactional hospitality to transformational experiences.

Social media amplifies this trend, as guests share experiences that feel original and meaningful, influencing wider perceptions of brand relevance.



They seek authenticity over uniformity, choosing brands that reflect their values and local culture.

In addition, flexibility is now non-negotiable. The rise of 'bleisure' travel and workations means hotels must accommodate both business and leisure seamlessly, offering co-working spaces, reliable connectivity, and environments that inspire productivity and relaxation. Guests also prioritise wellness, sustainability, and personalised services, that together create a hospitality experience that feels future fit around their needs.

63% OF TRAVELLERS SAY PERSONALISATION INFLUENCES THEIR BOOKING DECISIONS

Skift Research, 2024

57% OF TRAVELLERS PRIORITISE UNIQUE EXPERIENCES OVER COST SAVINGS

American Express, *Travel Trends*, 2024

MILLENNIALS AND GEN Z TRAVELLERS WILL MAKE UP **70%** OF LEISURE TRAVEL SPENDING BY 2026, WITH A STRONG PREFERENCE FOR AUTHENTICITY AND CULTURAL IMMERSION.

Expedia, *Future of Travel Report*, 2024

83% OF TRAVELLERS WANT PROPERTIES THAT REFLECT LOCAL CULTURE AND COMMUNITY VALUES

Deloitte, 2024



FROM PLEASURE, TO LEISURE, TO “BLEISURE”

TECHNOLOGY AS THE NEW CONCIERGE

Technology is redefining the essence of hospitality, not by replacing the human touch but by enhancing it. Guests now expect frictionless digital experiences: contactless check-in and keyless entry are no longer luxuries but basic expectations. Mobile first service, smart room controls, and **AI-powered personalisation create a level of convenience and customisation that traditional models can't match.** In fact, 70% of travellers prefer hotels offering digital check-in and automated room access to ensure a ease of access both when arriving and leaving.

Behind the scenes, technology is unlocking operational efficiencies and guest insights like never before. Nearly two thirds of hotels now leverage AI for predictive maintenance, revenue optimisation, and personalised recommendations, ensuring each guest interaction feels tailored. The result? Reduced friction, increased loyalty, and elevated brand perception, all achieved without sacrificing authenticity.



70% OF TRAVELLERS PREFER HOTELS WITH DIGITAL CHECK-IN AND KEYLESS ENTRY

Skift Research, 2024

TWO THIRDS OF HOTELS NOW USE AI FOR REVENUE OPTIMISATION, PERSONALISATION, AND PREDICTIVE MAINTENANCE.

Hospitality Research, 2025

CHATBOTS CAN RESOLVE 80% OF GUEST INQUIRIES INSTANTLY, IMPROVING EFFICIENCY AND GUEST SATISFACTION.

Oracle Hospitality, 2024

MOBILE-FIRST INTERACTIONS ACCOUNT FOR 68% OF HOTEL SERVICE REQUESTS, MAKING APP BASED ENGAGEMENT A NORM

Travelport Digital Report, 2024



Project imagery: Mayfly Carlton Hotel



Project imagery: Frank and Honest Cafe, Dunboyne



WELLNESS AND SUSTAINABILITY ARE THE NEW DECISION DRIVERS FOR TRAVELLERS



WHY WELLNESS MATTERS MORE THAN EVER

Wellness is no longer a niche offering, it's a core expectation. Today's travellers view hotels and resorts as spaces for restoration, balance, and holistic wellbeing (see our brochure on Workplace and the importance of wellness). From spa facilities and fitness programs, to mindfulness zones and nature-integrated design, wellness experiences now influence booking decisions. With 83% of travellers citing wellness amenities as a priority.

This demand goes beyond physical health. Guests are seeking mental clarity and digital detox opportunities, creating a new layer of hospitality experience where disconnection is as valuable as connectivity. Whether it's integrating biophilic design elements, offering tailored nutrition programs, or curating stress-free arrival journeys, hotels that prioritise wellness are positioning themselves as sanctuaries in an always-on world.



GLOBAL WELLNESS TOURISM
IS EXPECTED TO REACH
\$1.3 TRILLION BY 2025,
GROWING NEARLY TWICE AS
FAST AS OVERALL TOURISM

Global Wellness Institute, 2024

83% OF TRAVELLERS SAY
WELLNESS AMENITIES
INFLUENCE BOOKING DECISIONS

Global Wellness Institute, 2024

43% OF TRAVELLERS ACTIVELY
SEEK MENTAL HEALTH OR
STRESS REDUCING TRAVEL
EXPERIENCES, INCLUDING
DIGITAL DETOX OPTIONS.

Skyscanner Wellness Report

HOTELS OFFERING INTEGRATED
WELLNESS PROGRAMS SEE **19%**
HIGHER REVPAR (REVENUE PER
AVAILABLE ROOM) COMPARED
TO STANDARD PROPERTIES

Deloitte, 2023



SUSTAINABILITY AND REGENERATIVE HOSPITALITY



Sustainability is no longer optional, it's an expectation. And regenerative practices are the next frontier. Travelers are increasingly making booking decisions based on environmental impact, with 78% planning to choose sustainable accommodations in 2025. Forward-thinking brands are responding by embedding sustainability into every layer of their experience, from energy positive infrastructure and water conservation to zero-waste dining and local sourcing initiatives.

Regenerative hospitality goes even further, aiming not just to minimise harm but to create a positive impact on the planet and communities. This includes reforestation programs, biodiversity initiatives, and partnerships with local artisans and producers. By embracing these practices, hospitality brands demonstrate authenticity, attract conscious travellers, and future-proof their leisure business.

78% OF TRAVELLERS PLAN TO STAY IN SUSTAINABLE ACCOMMODATIONS IN 2025

Booking.com, *Sustainable Travel Report*

68% OF TRAVELLERS ARE WILLING TO PAY MORE FOR PROPERTIES WITH STRONG ENVIRONMENTAL CREDENTIALS

Expedia, *Sustainable Travel Study, 2024*

REGENERATIVE TOURISM PRACTICES IMPROVE BRAND LOYALTY BY **UP TO 25%**, COMPARED TO STANDARD SUSTAINABILITY MEASURES

Future of Hospitality Trends, 2024

41% OF GLOBAL TRAVELLERS SAY THEY ACTIVELY AVOID HOTELS THAT DON'T HAVE SUSTAINABILITY POLICIES

WTTC Sustainability Survey



Project imagery: Salt & Sage Cafe, Cork



**TRAVELLERS
ARE SEEKING
REAL, AUTHENTIC
EXPERIENCES,**

**STORIES WITH
PURPOSE**

AUTHENTIC, COMMUNITY DRIVEN EXPERIENCES

Dining has evolved beyond function, it's now a cultural experience and a storytelling opportunity. Guests crave authentic, community driven dining that reflects the character of the destination and celebrates local producers. Restaurants and even cafés that act as social anchors create a sense of belonging, **transforming a meal into a memorable shared experience.** This approach not only differentiates brands in a crowded market but drives measurable loyalty for the brand.

COMMUNITY FOCUSED DINING
INCREASES REPEAT VISITS
BY UP TO **15%** COMPARED TO
GENERIC CONCEPTS

Hospitality Research, 2025

69% OF TRAVELLERS WANT FOOD
EXPERIENCES THAT CONNECT
THEM TO LOCAL CULTURE

Condé Nast, *Traveler Food Trends Report*

RESTAURANTS THAT SOURCE
LOCALLY SEE A **10-20%**
IMPROVEMENT IN CUSTOMER
PERCEPTION OF AUTHENTICITY
AND QUALITY

National Restaurant Association, 2024

55% OF GUESTS ARE MORE
LIKELY TO SHARE DINING
EXPERIENCES ON SOCIAL
MEDIA WHEN THEY INCLUDE
LOCAL, AUTHENTIC ELEMENTS

Skift, *Culinary Travel Trends*

Community engagement also builds resilience. Sourcing locally reduces supply chain risks and strengthens relationships with regional suppliers, while hosting cultural events, chef's tables, or pop-ups enhances the sense of connection and enriching the storytelling even further. In fact, restaurants with strong community ties report up to 15% higher repeat visits, **proving that authenticity isn't just good for the soul, it's good for business.**

Project imagery: Salt & Sage Café, Cork



Project imagery: Orby restaurant, The Curragh

THE FUTURE OF HOSPITALITY IS ENRICHED BY...



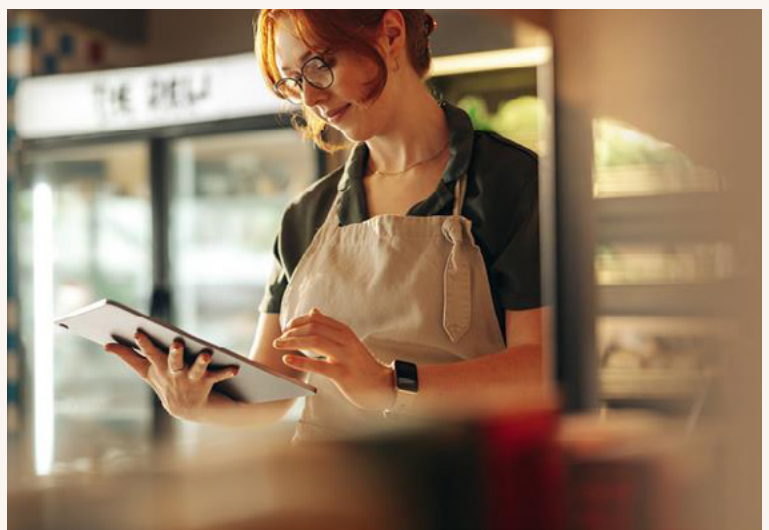
**AUTHENTIC
STORYTELLING**

THE FUTURE LENS: HOSPITALITY 2030 AND BEYOND

The next decade of hospitality will be shaped by innovation, inclusion, and imagination. Expect hyper-personalised AI-driven stays, fully integrated wellness ecosystems, and regenerative business models. Physical and digital ('phygital') realms will blur as hotels evolve into cultural hubs, where design meets community and sustainability defines status.

"The role of digital in the future of hospitality is to empower staff by handling repetitive tasks, which allows them to focus on providing a more human and personalized guest experience"

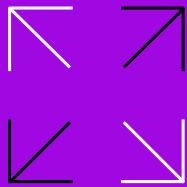
At TAP, we help brands explore these possibilities through **Lab@TAP**, our innovation and co-creation hub. It's where we test, iterate, and shape the experiences of tomorrow, ensuring your brand is not just keeping pace but setting the standard today, tomorrow and well into the future.



OUR CAPABILITIES, A FULL HOLISTIC SERVICE

Built to Match your Challenges

Our core pillars of strategy, experience and design are built to compliment one another whilst also ensuring that we can flex to meet your own business goals and challenges.



Strategy

Consumer and Market
Insights

Research and Trends

Brand Experience
Audits

Brand Strategy

Experience Strategy



Experience

Experience Mapping

Customer Journeys

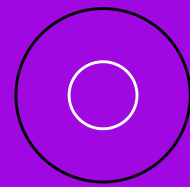
Space Planning

Destination & Flagship
Experiences

Digital integration

Storytelling

Sustainable Solutions



Design

Brand Identity

Tone of Voice &
Narratives

Brand Design

Industrial Design

Omnichannel Design

Retail Design

Service Design

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