UNIVERSITY OF NAIROBI
SCHOOL OF THE ARTS AND DESIGN

An evaluation of interior styles in the serviced apartment sector in Nairobi.

Project Report.

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B51/6683/2017.

This project report is submitted in partial fulfillment of the requirement for the Master of Arts in Design, Department of Design, University of Nairobi.

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DEDICATION.

I dedicate this research project to my family members who have made great sacrifices both materially and financially. Their overwhelming support, motivation and encouragement have always inspired and given me inner strength to endeavor. Thank you.

ACKNOWLEDGEMENT.

My gratitude goes to my supervisors Dr. Steve Gachie and Mr. Collins Makunda for their tireless effort, dedication and sacrifice in guiding me through the project. Special appreciation to my classmates for their unwavering support and academic contributions.

STUDENT'S DECLARATION.

I Mundia James do hereby declare that this Research Project, presented in fulfillment for an award of a Master of Arts degree in design (MA DESIGN), is my own unaided and original work. The work has not been presented in this or any other university for academic qualification. Furthermore, the research provides my own opinions and not necessarily those of The University of Nairobi.

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SUPERVISOR'S DECLARATION.

This project has been submitted for examination with my approval as the student's supervisor.

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ABSTRACT.

Serviced apartments play a major economic role in various economic zones worldwide. In Africa, they can promote economic growth if their potential is fully utilized, since their conceptualization is relatively young in the continent with their oversupply being one of the key challenges currently. Focusing on the unestablished serviced apartment brands in Nairobi which vastly contribute to this oversupply, the lack of originality in interior styles since most of the apartments are copying each other is one of the factors affecting their growth. This unoriginality is because the developers/owners' lack adequate information on what clearly entails a serviced apartment from a design standpoint. The study aimed at providing information to property owners/developers and potential investors in the serviced apartments sector in a design-oriented method, through evaluating the interior styles of the unestablished apartments with considerations on how they can relay their distinctiveness through tangible and intangible design elements such as colors, materials, décor, furniture, fixture & equipment, lighting, ambiance and design practices, and how they can deliver their brand's experience to customers through their interior styles. Objectives guiding the study included exploring the choice of interior style(s) incorporated in the serviced apartments, assessing how the serviced apartments can deliver their brand experience to customers through tangible and intangible interior style elements and to determine ways of enhancing creativity and innovativeness in the serviced apartments sector through interior style(s), to improve the serviced apartments' brand experience. A qualitative exploratory research design was incorporated to achieve these objectives and the findings indicated that there is lack of diversity in terms of interior style choices being deployed in the interiors. Most of the unestablished apartments had a modern finish/style with twists on the general structure and furnishings incorporated in the spaces. Furthermore, there still is a lack of adequate information on design standards/guidelines on what makes up a serviced apartment. Some of the apartments were refurbished but still used the previous concepts of interior styles and materials. To address these challenges, the study provided these guidelines and recommended awareness creation through various interior design forums and outlets like home expos and magazines, localization of styles into Afrocentric themes/styles to enhance design diversity in the sector, embracing ICT in terms of apt online marketing on online platforms, responding to changing guests' requirements and encouraging proper interior branding in the apartments.

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DEFINITION OF TERMS.

Serviced apartments: a form of accommodation concept in the hospitality industry that offers both long term and short term stays for a given period of time with additional services at a certain fee.

Interior style: a presentation of tangible and intangible design elements in the serviced apartments through evaluation from a performance and an aesthetic standpoint.

CHAPTER 1: INTRODUCTION.

1.1 Background to the study.

Serviced apartments are part of the relatively recent accommodation products in the hospitality industry that have attracted huge popularity in the recent past. They create a huge competition to the conventional hotels and are also an appealing alternative to the hotels; to business-oriented guests and those relocating for various durations (LaSalle, 2013). The ability to generate a higher profit and income than the average hotel through lower guest turnover makes them successful, since the staying duration is longer than that of regular hotels (E&Y, 2015). Being a fusion of the residential and hospitality market sector, they bridge the gap between a shorter and longer hotel stay and rental accommodation respectively.

The apartments originated in the USA purposefully for business-oriented and fun travelers and then spread into Europe and Asia (Poon, 2005; Vanichvatana 2006a, b; Phadungyat, 2008). Initially, they were constructed in holiday destinations as spaces for families that sought to duel in apartments, which would generally be serviced but provide a holiday home. They developed into extended stay hotels with provision of home-like features which are unavailable at standard hotels. Drawing back to Kenya, the current economy is categorized by focus on 3 factors which include delivery of services, knowledge-based industrial trading and innovation (Gathungu & Karoki, 2010). This presents a competitive age for the serviced apartments sector because of the amplified propagation of hospitality brands. Despite the swift move into the aforementioned factors, the brand establishment of some apartments has staggered due to various issues. Lack of adequate design information in the sector is one of the issues, which can be addressed through providing design standards/guidelines on what makes up a serviced apartment.

Kenya is highly inflated with serviced apartments as compared to other African regions, especially in the sub-Saharan Africa. East African capitals have over 6,600 operational serviced apartments and Kenya tops the region with 3,350 keys in operation in close to 100 apartments in Nairobi (Chabari, 2018). Customers are mostly aware of almost 20-30 apartments due to their higher ratings and their well-established brands in terms of services and interior styles, among other factors as per guest reviews on various booking sites. This leaves out quite a number of the unestablished apartments in the target zones. The abundance of these apartments has both positive and negative effects since it favors the well-known or main service brands while promoting product cannibalism.

1.2 Problem statement.

Serviced apartments became increasingly popular in the market recently, especially in Nairobi due to a number of factors like their relative affordability as compared to hotels, the home away from home feel, security and spacious units. However, there is an oversupply of hospitality space with an annual bed capacity of 20 million of which only 5.8 million was occupied in 2015 (Cytonn Hospitality report, 2017). This creates a supply and demand gap which has a negative outlook in regard to serviced apartments in both the real estate and hospitality sector.

Due to an oversupply of hospitality space in regard to unestablished serviced apartments in the Kenyan hospitality industry, some apartments are copying each other’s designs hence lacking originality. This allows the few local well-established properties like the Trianum hospitality limited or internationally branded properties like the Hilton and Fairmont hotels among others to flourish, due to their worldwide market reach, distinct designs and multiregional campaigns as the unestablished apartments stagger. The owners’/developers’ lack of information on what clearly entails a serviced apartment from a design perspective is what contributes to this unoriginality, which hinders their growth in the longrun.

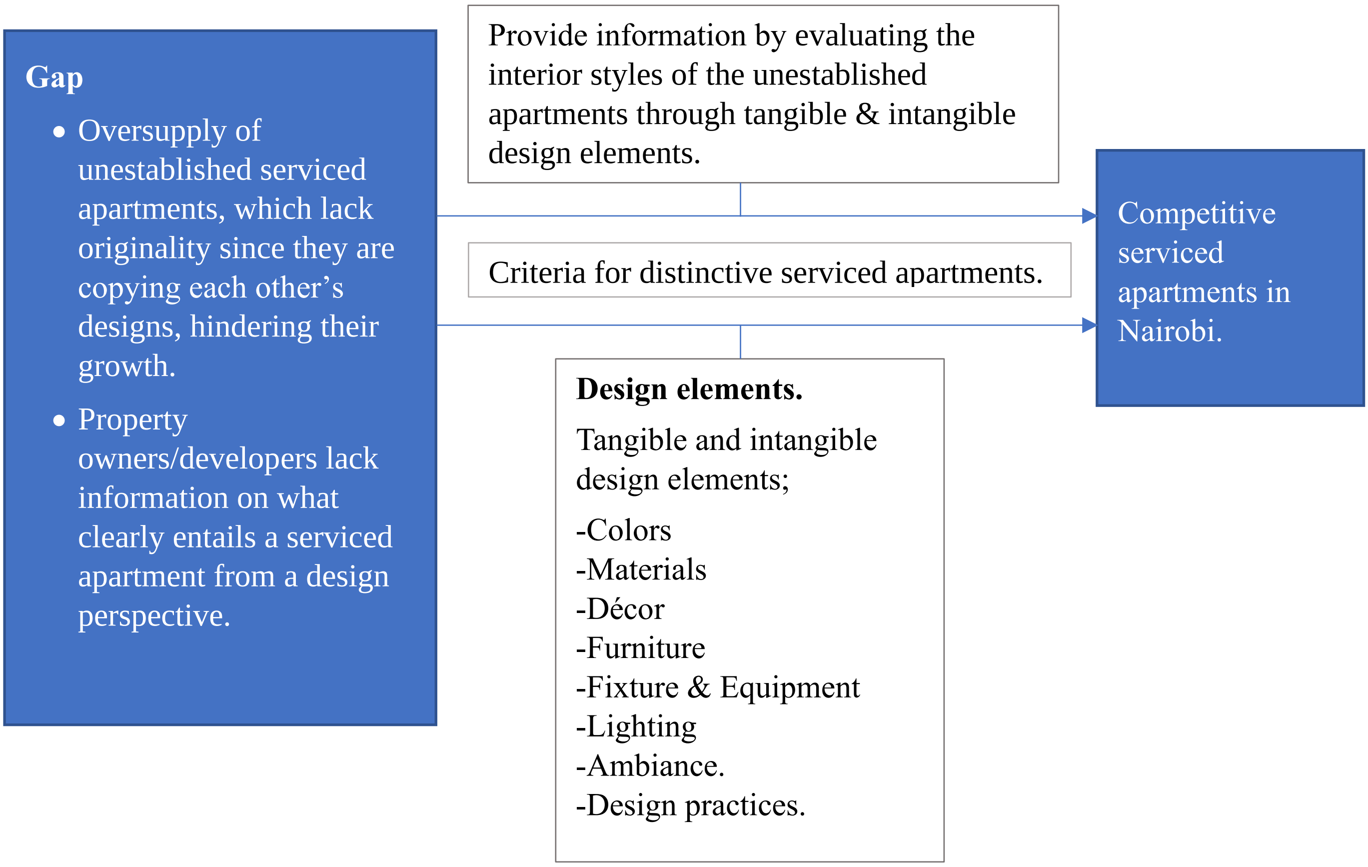
1.3 Research questions.

1. What interior style(s) have been incorporated in the serviced apartments in Nairobi?
2. How can the serviced apartments deliver their brand experience to customers through tangible and intangible interior style elements?
3. How can creativity and innovativeness in the serviced apartments sector be enhanced through interior style(s), to improve the serviced apartments’ brand experience?

1.4 Objectives.

1. To explore the choice of interior style(s) incorporated in the serviced apartments in Nairobi.
2. To assess how the serviced apartments can deliver their brand experience to customers through tangible and intangible interior style elements.
3. To determine ways of enhancing creativity and innovativeness in the serviced apartments sector through interior style(s), to improve the serviced apartments’ brand experience.

1.4.1 Conceptual framework.



1.5 Justification of the study.

Through examination of existing literature, there is a huge deficiency of design-oriented information on serviced apartments since most of the studies have focused on the economical aspect of the apartments and traditional forms of accommodation. The serviced apartments which are part of the alternative accommodation concept have been relatively unexplored (McIntosh, Lynch & Sweeney, 2007), especially as they are a contemporary accommodation concept still evolving in Kenya. Thus, there is a need for more research on them from a design perspective, taking into consideration the sector's growth, popularity and appeal. The study aims at providing adequate information to the property owners/developers and potential investors in the serviced apartments sector in a design-oriented method, through evaluating the interior styles of the unestablished apartments with considerations on how they can relay their distinctiveness through tangible and intangible design elements such as colors, materials, décor, furniture, fixture & equipment, lighting, ambiance and design practices, and how they can deliver their brand's experience to customers through their interior styles.

1.6 Scope of the study.

The study was limited to unestablished serviced apartments only, according to the apartments data reviews in regard to bookings and location. It was guided by a selected sample size in the serviced apartments market zones in Nairobi which included Westlands, Kilimani, Upperhill-Milimani, Valley Arcade – Lavington, CBD, Kileleshwa and Gigiri-Runda-Muthaiga-Kasarani.

CHAPTER 2: LITERATURE REVIEW.

2.1 Interior styles and the Serviced Apartments sector.

Interior style includes elements such as lines, forms and space, lighting, building materials, colours, patterns, methods of construction and the regional character which make a building either historically identifiable or notable. The most common characteristic of interior style is that it shifts chronologically, showing variations in fashions, perceptions of new ideas, inventions and resources which provide room for fresh styles (James, 2003). In any design-oriented field, as a particular style spreads, its origin continues to morph in new ways while other areas shadow with their unique variations and revivals and re-interpretations may occur with dilapidation of the style. Styles consequently develop from the antiquity of a society and are recorded under architectural history (Jas, 2007).

In a research intended to set up operational definitions and the fundamental phenomenon of style (Chan, 2016), four experiments were conducted and in the first experiment, college students were asked to sort out pictures of buildings having the same style to test operational definition. The results showed that style was recognized by the common features like roofing and window types, colour schemes, furnishings, ornamentation and construction materials present in the pictures and were physical forms appearing in many design products created by the designer. In the second experiment, students were asked to categorize pictures into four resemblance scales to test the degree of style and it was found out that the degree of style is in proportion to the available common features.

An architectural historian was used in the third experiment to identify a style in pictures that had various feature combinations to observe the measurement of style. Data retrieved showed that three features are the lower bound for style recognition. The fourth experiment tested the degree of distortion in order to measure the recognizability of a stylistic feature. An expert was asked to recognize distorted pictures, and the results showed that beyond 40% geometric distortion a feature is no longer the label of the style. Conclusively, three features attributing to a designer or four features repeating in a minimum of three different artifacts show an existence of individual style.

When also exploring individual style in design (Chan 2016), style is recognized by means of features in design works. This is especially true for architectural critics and historians who identify forms of products to distinguish styles. A final product comes from a series of design efforts which is regarded as a function of a design process. A design product contains a number of features and each of these features can be a solution of a sub-problem and results from a certain sequence of problem-solving actions.

A style is therefore justified by features that are functions of some design processes, hence a style is ultimately a function of the design processes that generate these features. Common features in products are key elements for observing and recognizing a style because the viewer's attention is on the resemblance between forms of products and this resemblance is argued to be caused by the resemblances between design processes. Features of the various products generated by a designer resemble each other and are therefore called the designer's style.

Choices of design styles will highly depend on personal preference, alternative solutions, constraints and design principles. On personal preference (Akin, 1986), style is used as a means to reduce the number of alternatives in the problem domain. The number of alternatives is the number of degrees of freedom that exist in the options of forms and materials created by technological advances and breakthroughs. To minimize the problem's complexity, architects would develop a system of constraints to be imposed on the design problems to reduce the number of degrees of freedom. In alternative solutions, design problems generally do not have unique optimal solutions thus style is used to choose one of many satisfactory solutions and a designer usually arrives to a final solution progressively through partial solutions.

Constraints can be used for selecting alternative solutions and also problem and solution structuring. Presumably, a style comes out of raising the criticality of a design problem by introducing personal constraints to reduce the search space. The main issue is to use personal constraints for choosing partial solutions and due to the personification of personal constraints, choices about alternative solutions may be made (Akin, 1986). In problem and solution structuring, a design is aimed at finding a solution that satisfies all sets of constraints since constraints determine solutions, of which some are given through the clients. A designer eventually must impose personal constraints and design principles to help in organizing problems and developing solutions.

A design principle is an architectural term referring to design issues that must be addressed in a design. It can be explained as a designer's design philosophy used to express their personal view of the world. The principle will determine the organization of design units and generate certain features in forms in which some design styles are expressed and when the principle is applied, it becomes a global constraint of the system. Various principles are related to various building types, and different designers would select different sets of design principles to handle their designs (Akin, 2012).

Currently when it comes to interior décor, a number of styles have been incorporated in interior spaces for both aesthetic and utilitarian purposes, which defer from each other. Totaling up to almost 14, the most commonly used in developing countries include; Modern, Contemporary, Minimalist, Industrial, Mid-century Modern, Scandinavian, Traditional, Transitional, French country, Bohemian, Rustic, Hollywood glam, Coastal/ Hamptons (Massey, 2008). In Kenya, the most common house styles incorporated in established serviced apartments' interiors include; Victorian, Cottages, Contemporary, Country and Colonial styles. (Kenya Homes Guide, 2016), (Bizna, 2017).

2.2 Classification of Serviced Apartments.

HVS market report (2013) considers the term serviced apartments to be an umbrella term that can be broken down into three categories: branded residencies, corporate housing and aparthotels.

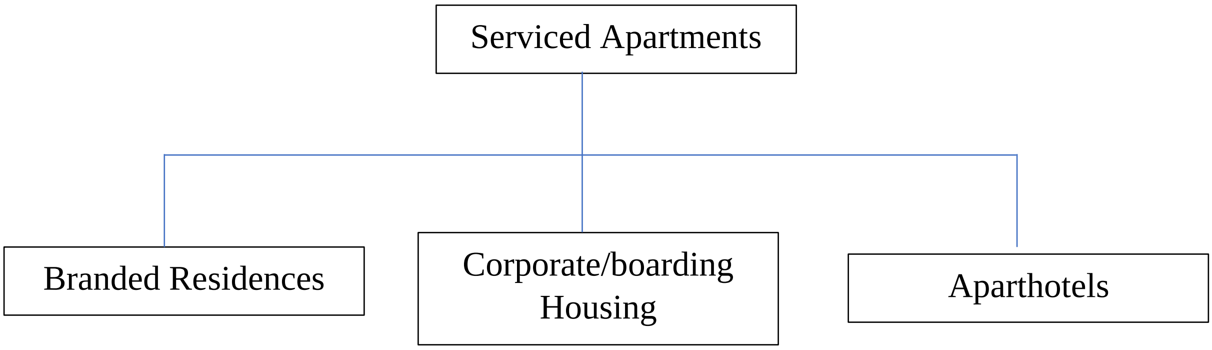


Figure 2.1: Classification of serviced apartments.

Source: HVS market report 2013.

2.2.1 Branded residences.

According to the HVS market report (2013), branded residences are a combination of a typical real estate investment grouped with the elusive "lifestyle" concept. They tend to fall into the upscale and luxury category and attract cash rich and time poor individuals who are constantly globetrotting and enjoy having their "home" looked after. They are managed by well-known hotel operators and are therefore usually located adjacent to a hotel. This allows the resident owners to benefit from the hotel services, facilities and amenities.

Residents are currently demanding much more than simply the enjoyment of hotel services and facilities. Wealthy consumers are craving art and design which has allowed high end fashion labels to enter the market. Branded residencies are usually located in international city centres as well as in resort destinations. When they are located in prime holiday destinations, they often target the ultra-rich by including even more astonishing features.

A simpler model has however emerged whereby an affiliation to a hotel operator alone is enough to create an identity for the development (i.e. physical attachment to a hotel property is not required). By creating a feel of uniqueness, branded residences focus on architecture and design in order to differentiate the product from regular residential developments in the operating market (Colliers International, 2015). The strong growth in branded residences has been spurred by its attractiveness to both developers and investors. Compared with unbranded residential properties, developers of branded residences have been observed to demand some premiums in the main key cities around the world. What drives this premium is innovation in terms of concept (a mix of hotel rooms and residential investment, the convenience of onsite services, design and security of buying into a brand). Similarly, investors see branded residences as a relatively safe investment as it is a tangible asset attached to a well-known luxury hotel brand. Moreover, the concept is also popular to investors due to its high-quality services and design.

2.2.2 Corporate/ Boarding housing.

HVS market report (2013) views corporate housing as a by-product of short-term apartments rental market. It facilitates the stay in residential like accommodation for periods of typically anywhere between 30 days and 2 years providing a “home away from home”. It smoothens the process of finding an apartment abroad, dealing with rental contracts and all other administrative work related to acquiring a temporary home. The corporate housing concept is quite successful in areas where residential vacancy and short term lets are low. They are basically used for relocations, business assignments, as a temporary home during remodeling, when attending courses/education or by the military. These apartments are usually furnished, with a bedroom, living and working area, fully equipped kitchen and function as regular apartments in that almost no services are provided. Therefore, skeleton staffing is in place, allowing the underlying business model to achieve high profit margins. The following terms also refer to the same concept: corporate housing, boarding housing, furnished rentals, vacation rentals and even serviced apartments.

2.2.3 Aparthotels.

The HVS market report (2015) states that aparthotels are often called extended stay hotels, but what differentiates them from hotels are the kitchenettes and slightly more spacious rooms although fewer services are provided. Cleaning for example usually occurs weekly rather than daily (unless at an extra charge) and all-day dining facilities are not always provided apart from breakfast. When a client does require additional services most aparthotels can provide them for a fee. The apartment unit products themselves are similar to the other products. The key differentiation in aparthotels is in the services and amenities offered; you frequently find 24-hour lobby receptions, daily housekeeping services, laundry services, self-managed on-premise restaurants and amenities in the form of swimming pools, gyms, health clubs and steam rooms/saunas. They target a mix of daily stays to monthly stays as reflected in rates charged to guests and relocating corporates, but those seeking extended stay in hotel like accommodation. They often carry hotel licenses as cited in the "Hotels and Restaurants Act" under the laws of Kenya. According to HVS market report (2013), unlike hotels, fewer services are provided. Pricing strategy is similar to that of hotels as prices tend to fluctuate daily. However, owing to slightly longer stays, pricing is regressive in function of the length of stay. They are usually more affordable than full service hotels since they only provide limited services. Low operating cost structure permits this type of pricing. On the other hand, Foxley (2001) has also classified serviced apartments based on the nature and quality of the services/facilities provided as follows:

i. Luxury apartments – Sited in prime localities and are equivalent to a four to five-star hotel. They are characterized with a high quality and a range of services/facilities such as a 24-hour reception and a daily maid service.

ii. Mid-range accommodation –Equivalent to a three-star hotel, offers a good quality accommodation with a 24-hour reception and a daily maid service. The services offered to guests are generally more restricted compared to that of luxury apartments. They may be sited in a fairly prime or off-prime locality.

iii. Budget apartments – Equivalent to a one to two-star hotel and offers more basic accommodation with a 24-hour reception but the maid service may only be offered on a weekly or bi-weekly basis. The variety of the services or facilities offered to guests is generally more limited. The location of the apartments may vary from poorer to prime quality areas.

2.3 Merits and demerits of serviced apartments.

Geieregger and Oehmichen (2008) and The Apartment Service Worldwide report (2015) indicate that serviced apartments offers business users a couple of benefits compared to that of the conventional hotels. Guests staying in serviced apartments for extended durations end up paying significantly less for accommodation compared to those staying in a conventional hotel due to the absence of additional costs such as the ones accruing from bar and room services. Gustafson (2014) adds that serviced apartments offer a comfortable environment to the business travelers and hence guests feel more relaxed and are likely to be more productive. Foxley (2001) reiterates that serviced apartments provide the comfort and facilities of a hotel and the facilities and privacy of home.

Furthermore, guests comfortably use the fully equipped kitchen and prepare their own meals. They can also conduct small business meetings and entertain guests (The Apartment Service Worldwide report, 2013). Finally, business travelers in serviced apartments can customize or personalize the required services (The Apartment Service Worldwide report 2013). Various room options with the ability of accommodating more than one guest are offered in serviced apartments (guests from the organization and staying for the same duration) which makes the choice of serviced apartments economically viable. It is observed that about half of major international organizations currently prefer to accommodate senior staff in apartments rather than the traditional hotels during extended stays (The Apartment Service Worldwide report, 2013 & 2015).

To the investors such as property developers, Henderson and Smith (2012) stipulate that serviced apartments investment is both attractive and profitable. Rental revenues are maximized in serviced apartments by ensuring that turnover costs and vacancy rates are minimized including revenues lost due to vacancies and search costs for the new tenants. It has been observed globally that while most of the serviced apartments allow at least 1 day stay, the most popular leases vary from 1 to 24 months (Poon, 2005).

Younes and Kett (2007) consider serviced apartments in commercial terms as a medium risk; concerning start up, operating and obsolescence costs. Compared to hotels, serviced apartments use less personnel and amenities or services which add to its operational efficiencies. Henderson and Smith (2012) also note that considering serviced apartments configuration, serviced apartments business exit strategy is fairly simple as individual apartment units may be disposed to individual buyers which may not be possible for the hotels.

Despite those advantages, serviced apartments have their own challenges. Locating a serviced apartment that suits one's requirements in both utilitarian and design aspects may be a challenge as they may not be listed in online portals or other sources. Secondly, reliable information about specific serviced apartment properties persists as yet another challenge. There is also a lack of standardized quality assessment in the sector, like star ratings in hotels. Thirdly, the terms and conditions of serviced apartments vary greatly from property to property and from location to location. Additionally, the procedure of booking can be quite tedious and even require signing leases and bulk payment, including deposits for stays shorter than six months. Fourthly, Interpreting Check-In and Check-Out Instructions can lead to confusion. Many serviced apartments have a self-check in process where there are no front desk personnel to assist with the check in and check-out. Fifth, if there is breakdown in an amenity such as internet access, it may lead to inconvenience for the customer. Without the right support in the event of a breakdown in amenities it can be a bad customer experience.

Their increasing popularity does seem to suggest the advantages outweigh the challenges though most of these challenges can be allayed.

2.4 Serviced Apartments global outlook.

Worldwide, as at January 2018, there were 1,022,984 serviced apartments operating in 1,364 locations, an increase on 2016/17 of 19% in units and this denotes a significant expansion in this sector even though it varies from regions, cities and years (The Apartment Service report, 2018-19). Africa is still at the lowest level in serviced apartment supply by both units and location as compared to other world regions as displayed in figures 2.2 and 2.3. This is because of various factors which include the slow economic growth in terms of urbanization which causes discrepancies in infrastructure between countries, branding of the serviced apartments and the relatively untapped technological grounds in the region. (The Apartment Service report 2016-18, Knight Frank report 2017-18).

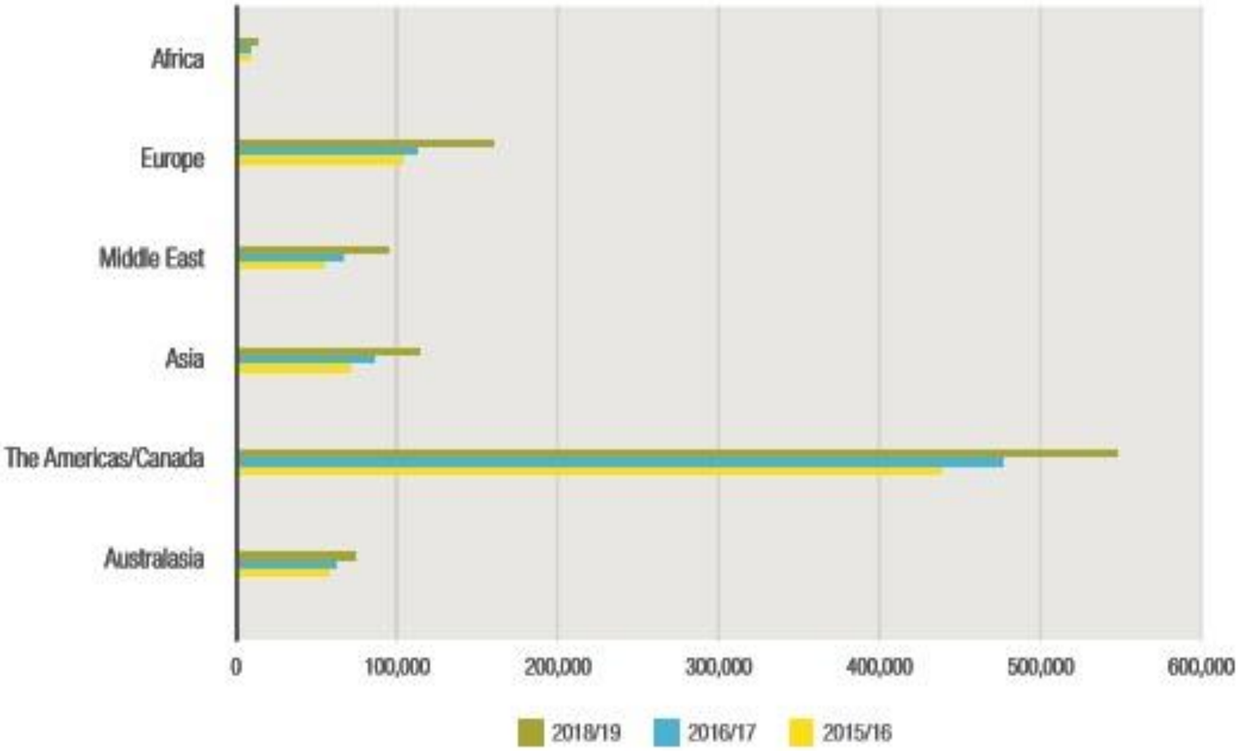


Figure 2.2: Service apartment supply by region. (units)

Source: The Apartment service report, 2018.

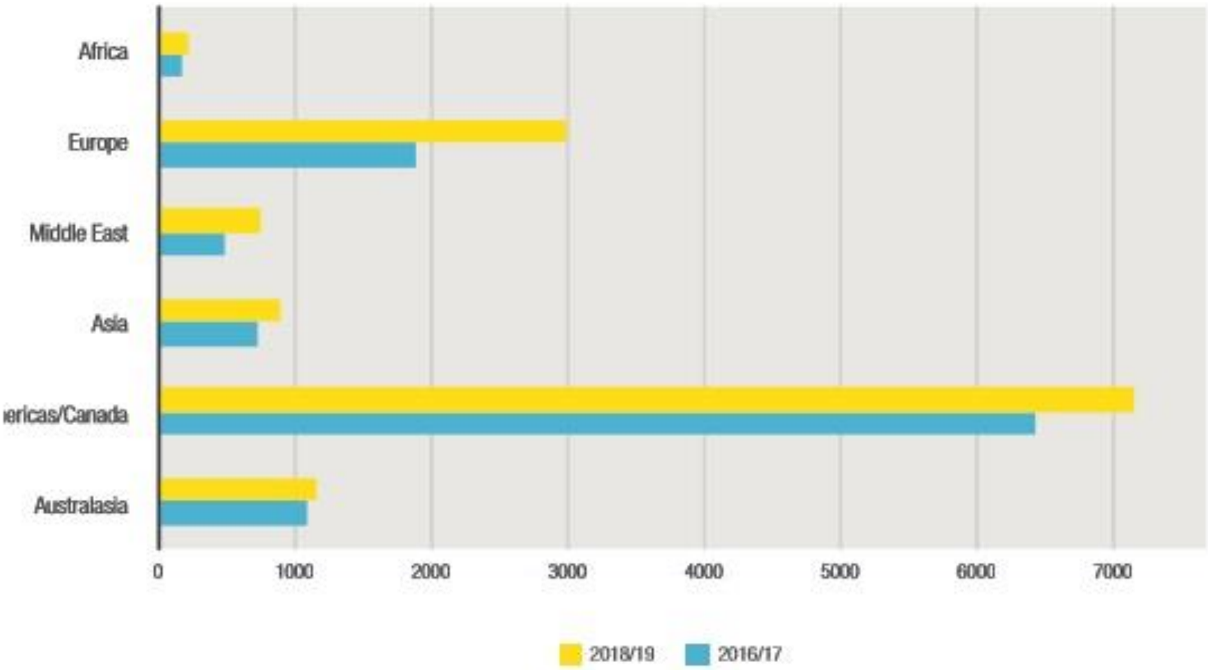


Figure 2.3: Service apartment supply by region. (location)

Source; The Apartment service report, 2018.

2.5 Serviced apartments in smart cities.

Less than a third of the world's population lived in cities in 1950s and by 2008 that figure had risen to 50%. It is projected by 2030 that an additional 1.2 billion people will be living in urban areas (The Apartment service report, 2017-18). Since 2000, Africa has seen an average GDP growth of over 5% per annum, with the Sub-Saharan region averaging growth of close to 6%. This can be attributed from a range of sources including the oil, gas and mining sectors which are now being thrown down the gauntlet by technology hubs flourishing across the region. 50% of African countries now have at least one technology hub with investments doubling in recent years (World Bank report, 2016). For instance, Ghana's Hope City intends to employ close to 50,000 people on software design and manufacturing and also Kenya's Konza Technology City is being built 60 miles from Nairobi. All these new tech-cities have included plans for hotel developments and serviced apartments (The Apartment Service report, 2016-17).

Globally, there are 2.8 billion internet users and 5.8 billion mobile phone users according to the Serviced Apartment News and Travel intelligence network. In their research on quantifying, analyzing and comparing brands' website content & functionality, social media and reputation management, it was concluded that digital marketing trends undertaken by serviced apartments vary wildly and furthermore, the sector is quite far behind other travel sectors when it comes to social media, due to the financial necessities of apportioning inadequate marketing resources into the most pro-active channels.

In Africa, the various serviced apartments hotspots include Cairo, Marrakesh, Accra, Dar es Salaam, Abuja and Nairobi and the global serviced apartments brands gaining traction in the region include; Marriot, which opened the first Marriot Executive suites in Addis Ababa in 2015 and are planning to open an additional 12 properties across Africa by 2020. Residence Inn which is also another brand is looking to open in Accra and Lagos. Frasers, The Ascott Ltd and Adagio are also targeting the Sub-Saharan market. Currently, there are almost 9, 500 serviced apartments in Africa in 166 locations from almost 8,800 in 102 locations between 2015 and 2017, a rise of 7.6% and 62.7% respectively (The Apartment Service report, 2017-18). There is still is a rise in interest in the serviced apartment sector in Africa although there is inadequate supply of outstanding serviced apartment accommodation.

2.6 Branding in the Serviced Apartment sector.

Progress is to be achieved across the continent by developing branded, extended stay apartments like the Fairmont, Serena and Hilton hotels among others which is evinced by major development planning schemes in Nairobi and Accra majorly (Newsroom, 2016). Lack of brand recognition is a major problem as in any undeveloped market since serviced apartments are often mistaken for hotels. Even though the serviced apartments and hotels are under the hospitality industry, they have different products and product differentiation which is key for sustainable economic growth, can be done through manipulation of many characteristics including features, performance, style/design, consistency, durability, reliability and repairability (Armstrong and Kotler, 1999).

2.6.1 Serviced Apartment branding through interior style.

Branding has endured for a considerable period of time as a distinguishable method of products and services between different producers in a given sector. As defined by the American Marketing association (2008), it is a name, term, design, symbol or any other feature that identifies one seller's good or service as distinct from those of other sellers.

Although conceptualizations of brands and brand equity vary, differences in definitions do not distinguish product branding from service branding or business to business brands from consumer brands (De Chernatony & Segal-Horn, 2003; Webster and Keller, 2004), (Davis, Golicic & Marquardt, 2011b). When it comes to serviced apartments, a physical space is an excellent place to create unique customer experiences, make memorable impressions and spark emotional connections with customers that will elevate a brand and influence their behavior and guest experience. Interior styles may seem like a luxury but in the real sense, the hospitality industry is handicapped without these styles because they increase brand awareness, communicate brand identity, improve company image, differentiate it from the competition, appeal to target markets, create unique and memorable experiences and develop customer loyalty (Villalon, 2017).

The regional culture and treatment of serviced apartment offerings in Nairobi is yet to fully mature with the primary point of focus being on select service (Chabari 2018). Furthermore, the serviced apartment sector is a very young segment which really started to form in 2010 and due to high fragmentation, the target market highlights mainly on local investors, families, investor groups and wealthy individuals and expatriates on assignments among other players. The main challenge is the lack of information on what makes up a serviced apartment thus providing information involves advising investors on what the industry really means and opportunity lies in bringing established brands into local markets (Muna, 2017).

Moreover, the brand is the essence of a company's identity and its promise to customers. By expressing the characteristics and values of a company's products and services, branding tells customers company/industry details and what they can expect, or not, from the products and services (Villalon, 2017). A strong brand encourages customers to buy a product or service not through marketing tactics but by sending a consistent brand message, meeting their expectations and nurturing their loyalty. Interior branding is interior design that amalgamates brand strategy to relay a company's identity through tangible and intangible design elements and to deliver that brand's experience to customers. It is more than a logo, color and sign and its effectiveness depends on the co-relation of design elements to create an exclusive and engaging physical and sensory experience with customers. Aligning every design decision with its brand identity strengthens and increases the value of its brand.

According to Villalon (2017), what customers notice most about a hotel, restaurant or store is its look and feel. Questions arising revolve around the personality of that space whether it is casual or elegant, contemporary or classic, simple or urbane, traditional or trendy? The brand defines but the interior branding expresses the brand. Strategic, well-executed interior branding sends the right message to the right customer at the right time and offers companies the opportunity to showcase their uniqueness and turn customers into promoters of their brand.

Additionally, competition, technological advances, social and fashion changes affect the design of hotels (Pannell Kerr Forster Associates, 1993) and in today's hospitality industry, the focus is shifting from customer service to customer experience and the zeal for authenticity is driving today's hospitality design. Each hotel ought to have its own story in that it must be a contextual place, reflective of its environment (Lowrey, 2016). Good interior design and technological combinations provide extraordinary guest experiences which promote more transparency around delivery channels since customers know who and what they are dealing with.

Moreover, from a technological standpoint, (Kinyagu, 2016) concludes that lack of awareness of the serviced apartments in the real estate sector in Kenya proved to be a factor hindering their growth and it was imperative that, there is need for robust marketing and awareness creation for both visibility and accessibility of these services. In this case, apart from embracing technology, investigating styles involved in the interiors of both established/unestablished apartments and providing correct information about the serviced apartment product and making sure the information reaches the consumer/customer will also promote awareness.

Currently, there are over 6,600 operational serviced apartments across the major capitals in Eastern Africa. Kenya leads the development pack in the region with 3,350 keys in operation in close to 100 apartments/complexes in Nairobi as displayed in tables 2.2 and 2.3. Kampala is also noted to be have an active serviced apartment scene with approximately 1,900 keys in operation (Chabari, 2018). In regard to Nairobi, out of the 100 apartments spread out across various market zones as shown in table 2.1 which include Westlands, Kilimani, Upperhill-Milimani, Valley Arcade – Lavington, CBD, Kileleshwa and Gigiri-Runda-Muthaiga-Kasarani, customers are aware of almost 20-30 apartments. They have both a higher guest influx and ratings due to their well-established brands in terms of services and interior styles among other factors according to customer reviews on various booking sites, as shown in table 2.4. This leaves out quite a number of the unestablished apartments in the zones with Westlands and Kilimani having the highest supply and popularity as shown in the figures below (HVS market report & Trianum Hospitality Report Kenya, 2015).

Zones	Location of Zone
Zone 1	Westlands
Zone 2	Kilimani
Zone 3	Upper Hill-Milimani
Zone 4	Valley Arcade – Lavington
Zone 5	CBD
Zone 6	Kileleshwa
Zone 7	Gigiri-Runda-Muthaiga-Kasarani

Table 2.1: Key Serviced Apartments market zones.
Source: HVS & Trianum Hospitality market report.

	2013	2014	2015	2016
Westlands	19	24	26	30
Kilimani	17	18	19	23
Upperhill-Milimani	7	9	11	12
Valley Arcade-Lavington		9	9	12
CBD	3	3	3	3
Kileleshwa		4	4	6
Gigiri-Runda-Muthaiga-Kasarani		2	2	9
Total	46	69	74	96

Table 2.2: Number of Apartments.
Source: HVS & Trianum Hospitality market report.

	2013	2014	2015	2016
Westlands	528	647	771	1042
Kilimani	518	537	625	679
Upperhill-Milimani	156	244	305	347
Valley Arcade-Lavington		272	272	359
CBD	260	260	260	253
Kileleshwa		103	103	212
Gigiri-Runda-Muthaiga-Kasarani		63	63	77
Total	1462	2126	2399	2966

Table 2.3: Number of Units.
Source: HVS & Trianum Hospitality market report.

Brand	**Location**	**Rating**
The Landmark Suites	Westlands	8.5
Reata Serviced Apartments	CBD	8.7
Kingfisher Nest	Westlands	8.5
Fedha Residences by Trianum	Kilimani	8.5
Heri Heights	CBD	8.4
Myra Residences by Trianum	Kilimani	8.9
The King Post	Westlands	8.3
Nelson’s court Serviced Apartments	Westlands	8.5
GemSuites Riverside	Lavington	8.6
Norfolk Towers Apartment	CBD	8.0
The Grand Gables	Westlands	8.1
Fahari Palace Serviced Apartments	Westlands	8.0
Mimosa Court Apartments	Upperhill	8.0
Golfview Serviced Apartments	Upperhill	8.2
Batian’s Peak Serviced Apartments	Kilimani	7.9
Ole Dume Suites	Kilimani	7.8
Salonika Villas	Lavington	7.7
Njema Court Apartment	Westlands	7.6
Waridi Paradise Hotel and Suites	Kilimani	7.3
Eldon Villas	Kilimani	7.6
Woodmere Serviced Apartment	Kilimani	7.7
Meltonia Luxury Suites	Kilimani	7.7
Natural Oak Apartments	Kilimani	7.7
Diamond Plaza Apartments	Muthaiga	7.0
Exotic Serviced Apartments	Kilimani	6.9

Table 2.4: Main Serviced Apartments Brands in Nairobi as per bookings and online reviews.

CHAPTER 3: DATA COLLECTION AND METHODS.

3.1 Research design.

The study adopted an exploratory research design to establish priorities and develop operational definitions to solve the problem at hand. This was by reviewing available literature on the serviced apartments and using both structured and unstructured qualitative approaches such as questionnaires, discussions and in-depth interviews with customers and the serviced apartments' owners/employees among other stakeholders in the sector (Kombo & Tromp 2006). Both quantitative and qualitative methods were used in the research in summarizing and categorizing the data into emerging themes. Results were presented through figures and tables and quantitatively through percentages and charts for easy interpretation of information.

3.2 Study Area and population.

The study analyzed unestablished serviced apartments which are spread out across various market zones in Nairobi which include Westlands, Kilimani, Upperhill-Milimani, Valley Arcade – Lavington, Kileleshwa and Gigiri-Runda-Muthaiga-Kasarani as displayed in figure 3.1. The Serviced Apartment report (2018) indicates that Kenya leads the development pack in serviced apartments in East Africa with 3,350 keys in operation in close to 100 apartments in Nairobi. However, customers are aware of almost 20-30 apartments. The study population therefore consisted of the approximately 70 unestablished brands across the zones.

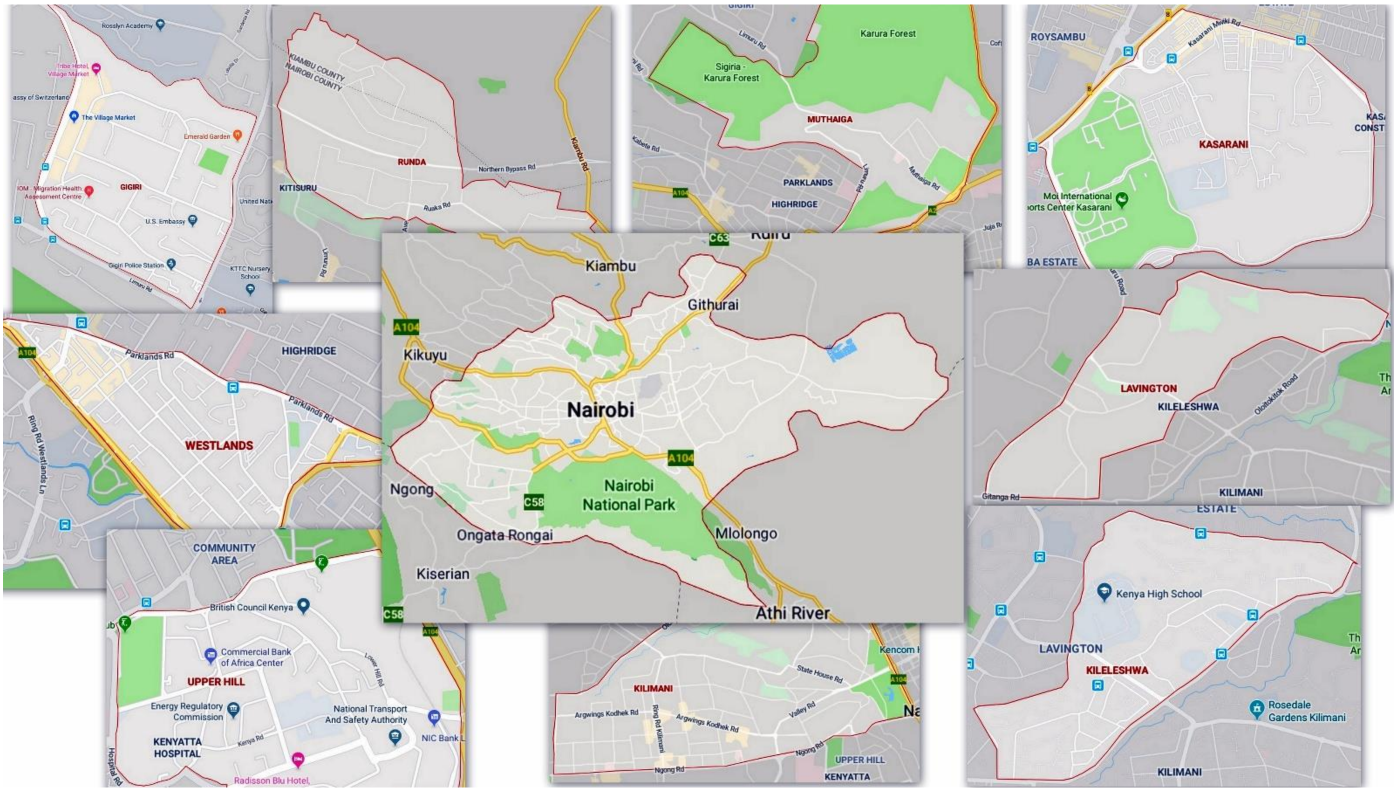


Figure 3.1: Map of Nairobi county showing the serviced apartments market zones.

Source: Google maps; Nairobi City county, 2018.

3.3 Sampling techniques, sample size and distribution.

The target population was computed based on the serviced apartment population estimated by HVS market report (2015) with consideration on the lesser known apartments only, through separating established apartments in each market zone and reviewing data from various booking sites, which now puts Westlands at 23, Kilimani at 13, Upperhill – Milimani at 10, Valley Arcade – Lavington at 10, Kileleshwa at 6 and Gigiri-Runda-Muthaiga-Kasarani at 2, totaling up to 64 known serviced apartments. Simple random sampling was adopted in distributing questionnaires. Each of the identified serviced apartment complexes was allocated a number and placed in a box and mixed so as to give each apartment a chance of being selected. Respondents with information for the selected apartments constituted the developers or property managers and in their absence the caretakers or any other developer's representatives. In order to gather the customer perceptions towards the serviced apartments, each of the selected serviced apartment was issued with extra questionnaires for the available guests to fill. According to Mugenda and Mugenda (2003), a sample size of between 10 and 30 % offers a good representation of the target population and hence a 30% sample size was considered adequate.

The sample sizes are calculated as follows: 30%*23 = 7 apartments in Westlands, 30%*13 = 4 apartments in Kilimani, 30%*10 = 3 apartments in Upperhill – Milimani, 30%*10 = 3 apartments in Valley Arcade – Lavington, 30%*6 = 2 apartments in Kileleshwa and 30%*2 = 1 apartment in Gigiri-Runda-Muthaiga-Kasarani.

3.4 Data Categories.

Both primary and secondary data was collected during the study. Field surveys of the various zones assisted in the collection of primary data. The primary data sought included investigating interior styles used in the unestablished serviced apartments with considerations on how they relay their distinctiveness through tangible and intangible design elements such as colors, materials, décor, furniture, fixture & equipment, lighting and ambiance, and how they deliver their brand's experience to customers through their interior styles. Secondary data comprised of a thorough literature review of documented information from publications, journals and reports. The aspects reviewed included the interior styles and the serviced apartments sector, classification of the serviced apartments, merits and demerits of the serviced apartments, the serviced apartments global outlook, serviced apartments in smart cities, branding in the serviced apartment sector and serviced apartment branding through interior style.

3.5 Data collection methods and instruments.

Both primary and secondary instruments were used in collecting the necessary information. Questionnaires administered to the selected respondents were used during collection of primary data and clarification was given to questions where respondents had difficulties. Both close – ended and open – ended questions were used. The close – ended questions provided more structured responses while open – ended questions helped in testing the rating of various practices and perceptions. (Kothari, 2004). In order to gather detailed information that cannot be obtained through administration of questionnaires, both oral and written interviews were incorporated. This was undertaken by identifying the various key informants/ designers and seeking their indulgence.

Observation and photography were also used. Observation involved getting information through the investigator's own direct observation and taking down notes while photographs captured information as it is on the ground. This aided in capturing existing serviced apartments conditions in the areas of study in relation to their interior styles. Secondary data was compiled through review of both published and unpublished literature relevant to the study. These included books, articles, internet, magazines, newspapers, reports, journals, legislations and government policies. Maps and physical development plans of the area from the relevant authority also constituted secondary data as well.

3.6 Data analysis and results.

The collected data was analyzed using both qualitative and quantitative methods. Qualitative data was analyzed manually initially by summarizing the information gathered, categorization and coding into emerging themes and presenting in a narrative form. Results were presented through figures and tables and quantitatively through percentages and charts, to facilitate easy interpretation and understanding of the information by the users and a brief explanation of each offered.

3.7 Ethical issues.

Informed consent was sought from all the study participants and all subjects were made to participate voluntarily. Confidentiality was assured and maintained throughout and the researcher accepted individual responsibility for the conduct and consequences of the research.

3.8 Limitations of the study.

The study was limited to unestablished serviced apartments in Nairobi that were only listed on various online platforms. This left out quite a number of those that haven't fully embraced technology in terms of efficient online property listing and were using ambiguous means of advertisement, basing on their proximity to infrastructure or social amenities. More inclusive research thus has to be done to assess the performance of these unestablished apartments. In some cases, the required respondents were away or engaged in other duties thus questionnaires had to be left and then picked later. Access to some of the apartments was a challenge in terms of location which was aided by google maps, and especially where security guards and the respondents were suspicious of the motives of the survey. Other suspicious respondents refused to answer both the questions and questionnaires due to fear of false exposure/ threats. These problems were solved through adoption of appropriate interpersonal skills in persuading and correcting such misunderstandings which involved a refined personal introduction and a clear outline of the purpose of the study. A few respondents could not fully comprehend some of the issues and they had to be interpreted to by the researchers.

CHAPTER 4: DATA ANALYSIS AND PRESENTATION.

4.1 LOGICAL FRAMEWORK.

Objective 1: To explore the choice of interior style(s) incorporated in the serviced apartments in Nairobi.				
Data needs.	**Data source.**	**Data collection method.**	**Analysis method.**	**Findings.**
Images.	14 Apartments. 2 Apartments. 2 Apartments. 1 Apartment.	Observation & photography.	Visual analysis.	-Modern style. -Contemporary style. -Rustic style. -Mid-century modern style.
Objective 2: To assess how the serviced apartments can deliver their brand experience to customers through tangible and intangible interior style elements.				
Data needs.	**Data source.**	**Data collection method.**	**Analysis method.**	**Findings.**
Practices & perceptions.	4 Interior designers. 19 developers/ owners. 5 informants- established serviced apartments.	Questionnaires & interviews.	Discourse analysis.	-Appropriateness of materials. -Physical properties of materials. -Technique. -Symbolism. -Reviewing current building design codes. -Reviewing interior style effectiveness for lower guest turnover.
Objective 3: To determine ways of enhancing creativity and innovativeness in the serviced apartments sector through interior style(s), to improve the serviced apartments' brand experience.				
Data needs.	**Data source.**	**Data collection method.**	**Analysis method.**	**Findings.**
Knowledge/ information.	4 Interior designers. 1 hospitality report analyst. Property owners and guests in the serviced apartments.	Questionnaires & interviews.	Framework analysis.	-Create awareness in the sector through design. -Response to changing guests' requirements. -Avoiding overuse/replication of styles. -Embracing ICT. -Encouraging proper interior branding.

Table 4.1: Logical Framework.

4.2 DISTRIBUTION OF QUESTIONNAIRES AND RESPONSE RATE.

Two categories of questionnaires and an interview schedule were designed for data collection across the market zones and analysis was guided by the objectives of the study.

Respondents	Questionnaires issued	Questionnaires received	Percentage response
Kilimani			
Developers, property managers and caretakers.	4	4	100%
Guests	18	15	83%
Total	**22**	**19**	**86%**
Westlands.			
Developers, property managers and caretakers.	7	4	57%
Guests	30	22	73%
Total	**34**	**26**	**77%**
Upperhill-Milimani.			
Developers, property managers and caretakers.	3	1	33%
Guests	12	**7**	58%
Total	**13**	**8**	**62%**
Valley Arcade-Lavington.			
Developers, property managers and caretakers.	3	3	100%
Guests	20	11	55%
Total	**23**	**14**	**61%**
Kileleshwa.			
Developers, property managers and caretakers.	2	2	100%
Guests	10	6	60%
Total	**12**	**8**	**67%**
Gigiri-Runda-Muthaiga-Kasarani.			
Developers, property managers and caretakers.	5	5	100%
Guests	15	10	67%
Total	**20**	**15**	**75%**
Total	**129**	**90**	**70%**

Table 4.2: Distribution of questionnaires and response rate.

From the table above, the response rate is at 70% (90 respondents) while 30% (39 non-respondents) were non-responsive and according to Mugenda (1999), a response rate of 50% is adequate for both analysis and reporting. Thus, a 70% response rate from the zones was considered adequate to give valid results.

4.2.1 SUMMARY OF QUESTIONNAIRE AND INTERVIEW RESULTS.

The majority of people that took the questionnaire were the serviced apartments owners, representatives on site and guests who were occupying some of the apartments. Most of the owners were conversant with the exact style they incorporated in the apartments though a number affirmed that they basically let their contracted interior designers come up with the ultimate design. This contributed to most of the apartments ending up with almost similar modern styles in their interiors since the style is meant to build for function and is simpler to achieve with current industrial raw materials like chrome, glass and concrete, which new technologies make available. However, the owners acknowledged they lacked proper information on interior styles and how they could be incorporated in the apartments. Most of them focused on getting revenue as they compete with the already established apartments, more than thinking of exclusive ways of making their properties unique and then competitive in the sector.

On the other hand, various stakeholders in the sector also had varied opinions on how the serviced apartments could deliver their brand experience to customers through tangible and intangible interior style elements. Most of the interior designers suggested that the apartments could focus on the appropriateness of the materials being used in the interior spaces and also assess their physical properties, explore the techniques used in various fabrication process and they could also consider the use of symbolism in the interior spaces through artefacts. After interacting with both owners and representatives from unestablished and established apartments alongside some interior designers, it emerged that there is need for reviewing current building design codes with other stakeholders in the serviced apartments sector; especially the government. Furthermore, most of the established apartments reviewed their interior style effectiveness to reduce on their guest turnover, so as to improve the customer experience which is a trait that can be emulated by the less established apartments.

Creativity and innovativeness is key for survival in the sector and most of the feedback from the guests revolved around emphasis on originality in the interiors, embracing IT through efficient online listing and proper interior branding with regard to authentic/durable material selection, all for a better guest experience. Additionally, some interior designers and hospitality report analysts suggested creating awareness in the sector through influential design forums and not only digital marketing, and their also needs to be consistence response to the ever-changing guest requirements. The results enabled the criteria for distinctive serviced apartments to be developed.

4.3 INTERIOR STYLES INCORPORATED IN THE APARTMENTS.

It is important to keep in mind that before choosing any interior style and using it in a space, form should follow function, which is precisely a modernist approach in design. However, it is also valid for function to follow form in various non-modernist approaches and creating spaces that are efficient and appealing is vital and can be achieved through;

- Planning with a purpose.
- Understanding that interior style and designs change over time.
- Knowing that functional spaces are more valuable.
- Considering cost by understanding what is aimed to be achieved and for whom.

From the study, the main interior styles incorporated in the serviced apartments' interiors were;

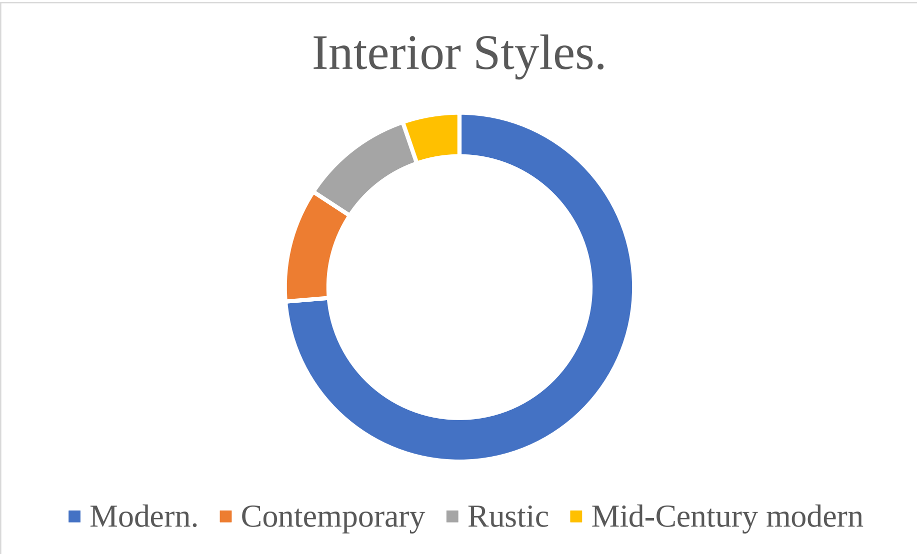


Figure 4.1: Prevalence of interior styles in the serviced apartments.

Source: Field survey, 2019.

- Modern. (14; Spread out across all the serviced apartments market zones.)
- Contemporary. (2; Westlands and Kileleshwa.)
- Rustic. (2; Westlands and Kilimani.)
- Mid-Century modern. (1; Westlands.)

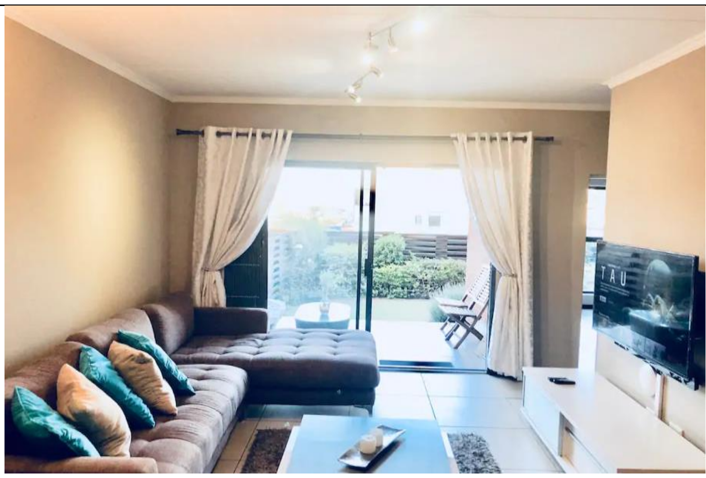
	
Modern: (Marriot Executive Apartments, Addis Ababa – Ethiopia.) • Modern style is based upon new and innovative technologies of construction, with the idea that form should follow function, an embrace of minimalism and a rejection of ornamentation (Royal Institute of British Architects, 2018).	**Contemporary**: (Sandton, Gauteng – South Africa.) • Contemporary style involves creating designs that embody all the differences in various present-day interior styles, without too much focus on any of them (ArtWiki, 2018).
	
Rustic: (Woodmere serviced apartments, Nairobi – Kenya.) • The Rustic style is a design emphasis on rugged natural beauty with nature inspired textures, simple earthly colours and unpretentious organic warmth (Homedit, 2019).	**Mid-Century Modern**:(Airbnb, Cape Town – South Africa.) • The style focuses on a clean, minimalist aesthetic, an emphasis on bringing the outdoors in and the presence of angular structures (Kelly Richman-Abdou, 2017).

Table 4.3: Exemplars of interior styles used in the serviced apartments.

Identifying these styles through various criteria was made possible by interacting with some of the designers who handled the projects, after being referred to them by the owners of the apartments. Conclusively, designing the interiors to come up with the styles was based on various aspects of interior design which are; colour palettes, furniture, fabric and lighting.

4.3.1 MODERN STYLE.

14 apartments spread across all the serviced apartment market zones had a modern interior style which include:

Kilimani;

Greenpath residence, Crystal serviced apartments and Highlands suites hotel apartments.

Westlands;

Kengen Rbs Apartments.

Upperhill-Milimani;

Serene Valley Apartments and Spa.

Royal Apartments.

Valley Arcade-Lavington;

Homely Apartments.

Miloski Suites.

Rose Garden Apartments.

Kileleshwa;

Huku Qwetu Sea breeze Apartments.

Gigiri-Runda-Muthaiga-Kasarani;

City Airport Apartments, Fourways Junction Estate, Gem Suite State House Apartments, Grace furnished Apartment and Taarifa suites.

Figure 4.2: Greenpath residence, Kilimani.
Source: Field survey, 2019.

The modern style basically involved the use of natural materials, neutral or earthly colours and elimination of unnecessary detailing as displayed in figure 4.2. Colour variations included monochromatic schemes as shown in figure 4.4, earth tones, bright schemes, modern meets vintage and an artful mix. Furniture used involved cutting off of excess material, modification and practicality of the materials as displayed in figures 4.3 and 4.4 which greatly influenced their design and the general aesthetic appeal in the interiors. Most soft furnishings/ fabrics used natural materials and neutral or earthly colours. The lighting fixtures aimed at complementing the architectural design and look of the apartment by representing an intersection of function, form and style as displayed in figure 4.4.

Figure 4.3: Crystal Glow Serviced Apartments, Kilimani.

Source: Field Survey, 2019.

Figure 4.4: Serene Valley Apartments and Spa, Upperhill-Milimani
Source: Field Survey, 2019.

4.3.2 CONTEMPORARY STYLE.

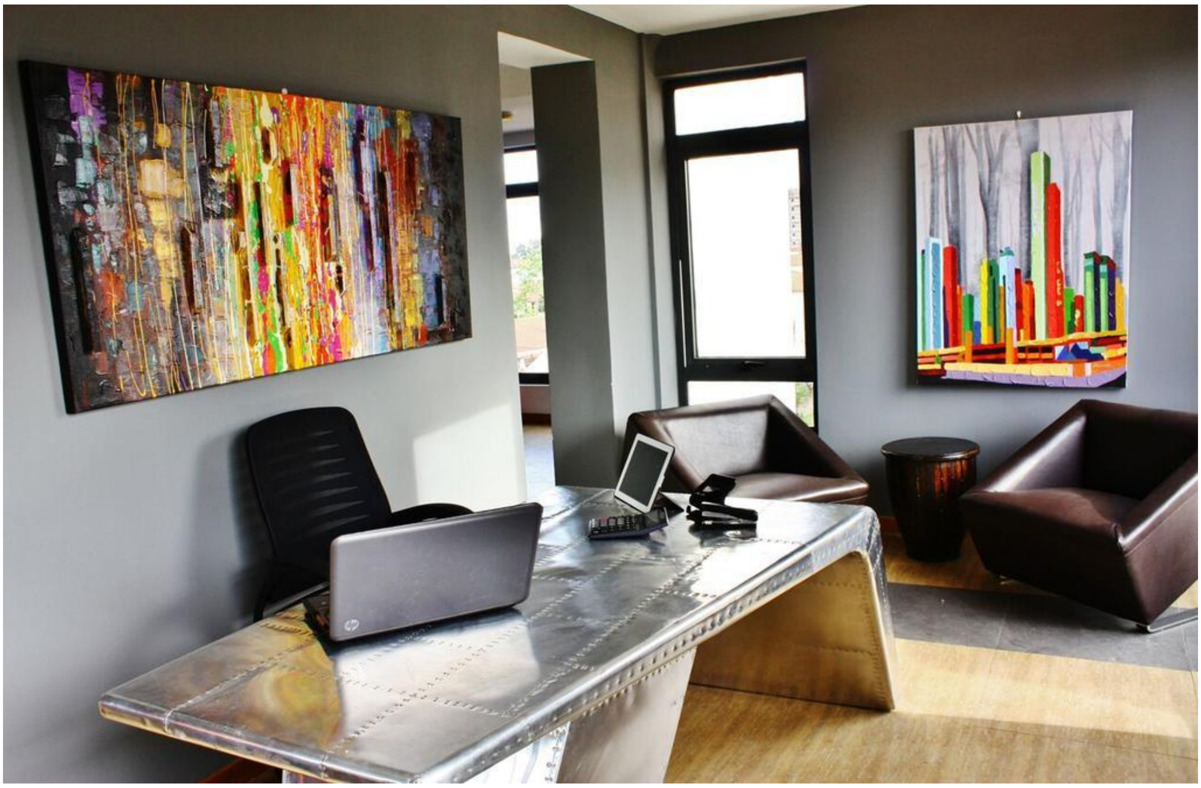


Figure 4.5: Suite Life Serviced Apartments, Kileleshwa.
Source; Field Survey, 2019.

The contemporary style which is constantly evolving to reflect popular styles of present-day designs, by borrowing qualities from post-modernism and minimalism among other global styles without specifically focusing on any of them, was incorporated in Prime Apartment and Suite Life Serviced Apartments in Westlands and Kileleshwa respectively. Neutral elements and bold colours focused on the basics of line, shape and form as displayed in figures 4.5 and 4.6. Tone on tone colour palettes relied heavily on black, brown, taupe, cream and pure white, with shots of colour sometimes found on a single wall, in a striking floor rug or in special art pieces as displayed in figure 4.5. Furniture pieces were entailed with clean lines and smooth surfaces without any carving or adornment, made of light-colored wood like maple and birch, frosted or clear glass and stainless steel. Most fabrics contained natural fibers like wool, leather, silk, linen and cotton because of their textural aspect and inherent natural hues. Lighting fixtures were used as artistic statements in the interiors and the floor/table lamps were characterized by straight lines and sleek metallic finishes, with specially colored shades as displayed in figure 4.7. Furthermore, recessed lighting drew attention to well-placed art, accessories and surfaces as displayed in figure 4.8.

Figure 4.6: Prime Apartment, Westlands.
Source; Field Survey, 2019.

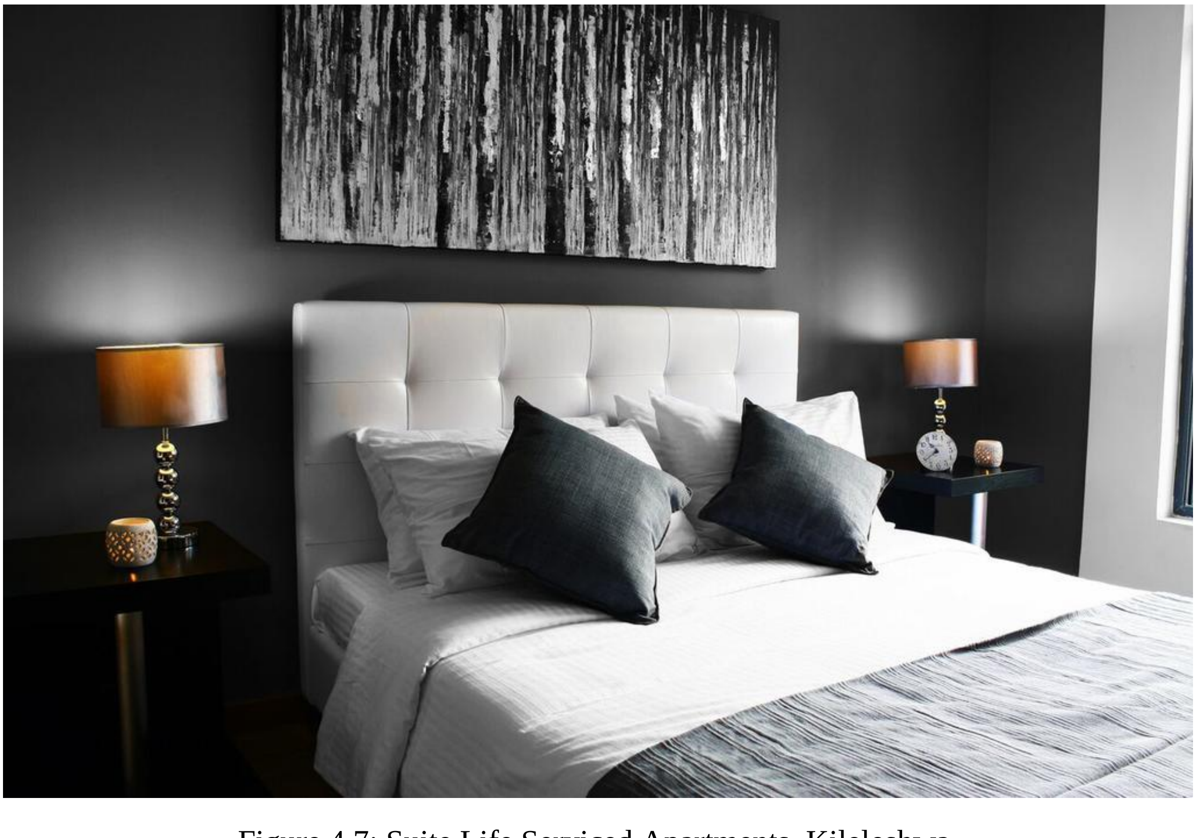


Figure 4.7: Suite Life Serviced Apartments, Kileleshwa.
Source; Field Survey.

Figure 4.8: Prime Apartment, Westlands.
Source; Field Survey, 2019.

4.3.3 RUSTIC STYLE.

Figure 4.9: Tropical Towers Apartment, Kilimani.

Source; Field Survey, 2019.

2 apartments had a rustic style in Westlands and Kilimani which include; Kates Apartments and Tropical Towers Apartments. The style generally involved common details like leather chairs, dark stained wood, beams, stonework as displayed in figure 4.9 and plenty of natural fibres. Natural colour schemes like brown, taupe, deep red, dark green, yellow, grey, white, black, stone work/stone veneer were used in the interiors. Weathered wooden chunky furniture with unfinished, edged, original or reclaimed wooden floors and leather/soft textured seats accessorized open surfaces in the rooms. Fabrics incorporated the use of wool, cotton, linen and animal hide rugs/ patterned area rugs and blankets or throw pillows with geometric or stripped prints as displayed in figure 4.10. The lighting was specifically designed for warmth and a rich ambience.

Figure 4.10: Kates Apartments, Westlands

Source; Field Survey, 2019

4.3.4 MID-CENTURY MODERN STYLE.

Figure 4.11: Cerenata Gardens Hotel and Suites, Westlands.
Source: Field Survey, 2019.

1 apartment from the field survey had a mid-century modern style; Cerenata Gardens Hotel and Suites in Westlands. The style basically involved uncluttered and sleek lines with both organic and geometric forms/curves, minimal ornamentation and juxtaposition of contrasting traditional as well as non-traditional materials as displayed in figure 4.11. The hues combined darker neutral tones with saturated accent colours and the furniture involved straight clean lines with smooth curved angles rarely featuring any fancy ornamentation or upholstery as displayed in figure 4.13. The furniture pieces relied on wooden construction but can also use fiberglass or metal and have one or two colours with little to no patterns. The fabrics incorporated asymmetrical abstract patterns and the lighting fixtures featured either very straight, geometric lines or round curved contours mostly accessorized with finished metal as shown in figure 4.12.

Figure 4.12: Cerenata Gardens Hotel and Suites, Westlands.

Source: Field Survey, 2019.

Figure 4.13: Cerenata Gardens Hotel and Suites, Westlands.

Source: Field Survey, 2019.

4.4 BRAND EXPERIENCE DELIVERY THROUGH TANGIBLE AND INTANGIBLE INTERIOR STYLE ELEMENTS.

The tangible and intangible interior style elements are the design factors that corelate with each other either directly or indirectly to achieve both utilitarian and aesthetic aspects in an interior space. The brand experience delivery through tangible interior style elements revolves around colours, materials, texture, lighting and finishes and they were categorized under three aspects which included appropriateness of the materials used in the apartments, their physical properties and the technique/skills used in developing them. The intangible interior style elements which are subtle carriers of the interior style integrity basically involved the knowledge in the serviced apartments, socio-political aspects/perceptions linked to design practices and instruments, objects and artefacts with their cultural representations/expressions. They were categorized under symbolism, reviewing current building design codes and reviewing interior style effectiveness for lower guest turnover, some of which were highlighted by other tangible interior style elements.

4.4.1 Tangible Interior style elements.

4.4.1.1 Appropriateness.

Appropriateness of the design materials/elements should be based on their compatibility with environmental and aesthetic conditions and their applicability to occupancy and size of the space. As displayed in figure 4.14, some of the apartments were not inclined to some of these factors, i.e. using wrong materials like MDFs in water prone areas, especially in the kitchen. This is attributed to lack of information/misadvise, cost or unavailability of the appropriate materials.

Figure 4.14: Renovated Kitchen area using laminated Medium Density Fiber boards (MDFs). Source: Field Survey, 2019.

4.4.1.2 Physical properties.

According to the interior designers, some of the qualities of the design materials/elements in the apartments are usually determined in the finishing process though most of the properties are inherent and cannot be changed. They include;

- **Physical and visual density.**
  Various design materials/elements have a particular tactile density which ranges from darkness to lightness in degrees of opacity, translucency and transparency.
- **Mass and thickness.**
  After material selection, dimensional perspectives based on requirements for durability, strength and aesthetic considerations of each material/element have to be made.
- **Strength.**
  This is quantified through resistance to compression and tension. Most of the apartments involved masonry in construction as it is most effective as a load bearing material and some incorporated steel in their interiors since it is a more suitable choice for spanning and tensile requirements.
- **Texture.**
  Surface treatment of various materials/elements varies from smooth to rough, soft to hard and typically matte, satin or polished because of either off-site production or on-site finishing.
- **Colour.**
  Some of the colour palette choices in the apartments considered the surrounding context and both the exterior and interior light qualities under which the colours were to be viewed. Some were light absorptive/reflective and warm or cool. Most of the modern and contemporary styled apartments had a monochromatic and polychromatic colour palette respectively.
- **Temperature.**
  The tropical Kenyan climate guided some of the owners, developers and designers in choosing materials/elements especially on high traffic areas such as door hardware, work surfaces and flooring materials. Metallic surfaces quickly registered a change in temperature while stone surfaces slowly absorbed temperatures and retained it for a longer period.

- **Pattern.**

  Some of the apartments had quite unique patterning as displayed in figure 4.15, which was designed in two scales; individual elements like the bricks and glass panes and composition of these elements into large formats.

Figure 4.15: Mosaic patterns on surfaces.

Source: Field survey, 2019.

4.4.1.3 Technique.

This includes the fabrication process, detailing of how the design materials/elements and systems are joined and installed and the craft employed to produce the work as displayed in figure 4.16.

- **Fabrication.**

  This involves the creation, processing and assembly of the interior style elements and the techniques range from handcrafted to mass produced to pre-fabricated. Interestingly, the elements used often carry traces of their making and assembly which create surface modulation and richness.

- **Detail.**

  The detailed assemblage of wood and concrete in some of the apartments determined how each individual element or system was joined. Common joinery techniques used are nails, bolts, rivets, welding and adhering.

- **Craft.**

  Even though the apartments are less established, some of the owners and developers employed well-trained and experienced designers who deployed a high level of building craft as a means to ensure success and longevity of their apartments.

Figure 4.16: Detailing and craft on surfaces in the interior space.

Source; Field survey, 2019.

4.4.2 Intangible Interior style elements.

4.4.2.1 Symbolism.

Terms such as natural and artificial are mainly used to describe design elements in the apartments and items such as artefacts, which are mostly sculptures among other art pieces carrying specific connotations within different cultures and regions as displayed in figure 4.17. In a few of the apartments that incorporated symbolism, the materials/elements associated with desired symbolic expressions were not accessible thus they were replicated to achieve desired effects.

Figure 4.17: Symbolism using artefacts.
Source: Field survey, 2019.

4.4.2.2 Reviewing current building design codes.

Some of the developers and owners concluded that the current designs of their apartments were affected by the socio-political practices affecting design. This is in regard to the archaic building codes set by the government, which are yet to adapt to the changing needs of the country, like allowing the use of locally available building materials. Developers currently cannot be granted regulatory approval to build permanent structures in urban zones unless they are using specific materials such as brick and mortar.

Through Gazette Notice (No. 13048, 14th September 2012), the Kenyan government is aiming at discarding the 1969 Kenya building code (British Standards and Codes of Practice) in favor of new 10 European construction guidelines - Eurocodes by 2021 (Kenya Engineer, 2016). In regard to encouraging and facilitating the marketing and use of materials, structural components and kits as one of the codes, Principal Secretary in the State Department of Industry and Enterprise Development, Julius Korir affirms the government will ensure these standards are localized to bring on board local building materials and local building practices to make them relevant and applicable in the country. This will enhance diversity after standardization and efficient safety tests are done on the materials, promoting the implementation of Afrocentric interior styles, which the unestablished apartments can adopt.

Through consultation with some of the interior designers in the field, Afrocentric themes basically involve the combination of vivid colours with earth tones and details like animal prints, which emphasize the opulence of the African continent. As displayed in figure 4.18, wooden figures and virtual masks create a mystical note in any given space and when it comes to incorporating the design, the key elements; warmth of the sun and wealth of both flora and fauna, need to be balanced up in the interior space. Focusing on reducing the cost of construction in the serviced apartment sector which can be efficiently achieved through these themes/styles, the simplest version of the style can be done through wall papers with native African and animal themes. Additionally, rough and simply wicker furniture with minimal but aesthetic surface finish, natural leather and landscape wallpapers all contribute to low costing as well as diversity in the interior spaces.

Figure 4.18: Living room space enhanced with African masks and statues.

Source: Interior Design and More, (2012).

4.4.2.3 Reviewing of interior style effectiveness for lower guest turnover.

As compared to established serviced apartments brands, always improving the customer experience through better ambience and services represents a huge opportunity for the unestablished serviced apartments. Understanding that the different customers have different expectations is key in improving these experiences such that, the leisure customer can be emotional and spontaneous and can impulsively click the "book" button by simply basing on how they perceive the ambience in the interior space. On the other hand, the business-oriented customer may take a rational and dispassionate approach to booking, guided by an objective criterion and a cool-headed analysis of options.

Having this knowledge is therefore essential to ensure efficient, insightful and personalized service delivery through interior styles used in the serviced apartments. This is because service acquisition decisions are made by the customers who spend time looking for what meets their needs. Thus, the experiences they go through shape their expectations. To achieve this, serviced apartments have to personalize and customize how they relay their identity through incorporating unique or customer-centred interior style ideas that serve both utilitarian and aesthetic purposes.

4.4.2.3.1 Key target groups.

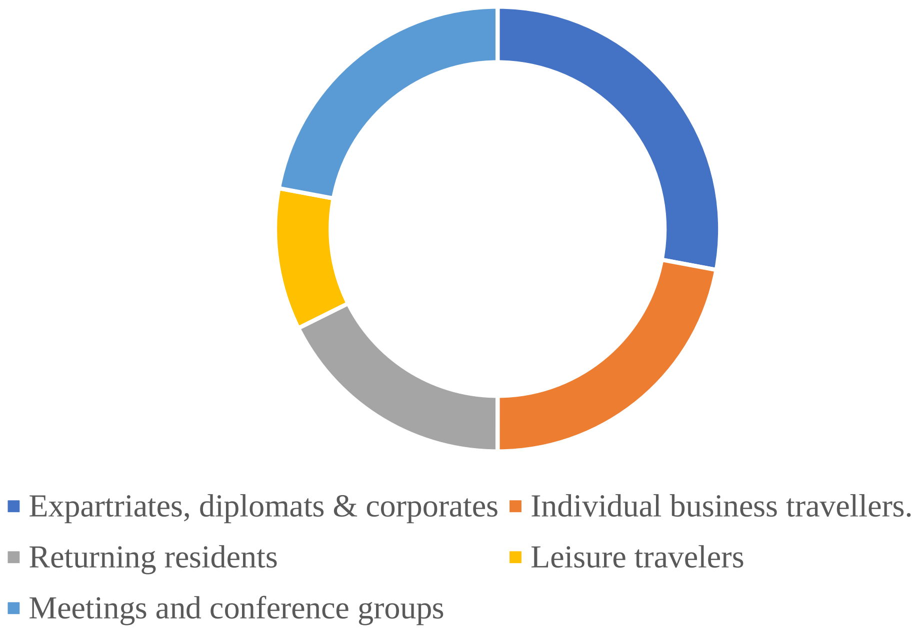


Figure 4.19: Prevalence of key target groups.

Source: Field survey.

In the study, all 19 of the respondents (owners/developers) said they mainly targeted expatriates, diplomats and corporates. However, 15 of them also targeted individual business travelers, meeting and conference groups, 12 targeted returning residents and 7 targeted leisure travelers. What predominantly stands out is individual business travelers, expatriates, diplomats and corporates, meetings and conference groups are the key markets for serviced apartments. They mainly come from local private and public organizations, foreign missions, regional and multinational organizations. In Kenya, the high influx of foreign missions leads to high demand for diplomat housing who have an allowance rate for incidental expenditure, meals and accommodation which makes them to prefer cheaper accommodation in the serviced apartments for a given duration of time. Those who travel as a group or with their families need more space for accommodation which makes the apartments an ideal choice.

- **Individual business travelers.**

They come to undertake business or seek business opportunities personally. The demand, whether local or international, is from corporations, institutions, governments and universities which typically involves less than five people and is based on the proximity of their accommodation to the area they are conducting business, mainly generated on weekdays for short spells between 2 nights to several months. Their unique requirements include: preference for a bed and breakfast package, single units for all members in one group, convenience of an onsite dinning venue although less consideration is put on ambience and aesthetics, multiple security features, business related facilities like business centres, a small meeting room on site offered complimentary or for a nominal fee and fast complimentary internet connectivity.

- **Expatriates, diplomats and corporates.**

Whether travelling alone or with family, they demand upscale, fully furnished and serviced apartments incorporating touches of value addition with regard to ambient design features, multiple security features, a rental rate inclusive of all utilities and communication services, power and water back-up options to lessen fluctuation downtimes, fast internet connectivity on complimentary basis, TV channels with international programming or DVD players, in unit washing and drying machines or in-house laundry services at nominal fees, recreation amenities such as gardens, fitness rooms, swimming pools, among others with much consideration to privacy and seclusion.

- **Meetings and conference groups.**

Meetings and conference groups demand is primarily generated by local, multi-regional and international companies, government and other public institutions holding training sessions, conferences, product launches or small meetings, as well as government and association meetings. International conferences have been held in the country in recent times and this has positively enhanced the serviced apartments industry. As Nairobi continues to grow as a regional hub for both private and public institutions, the need for conference facilities is expected to greatly increase, boosting the demand for quality meeting space with considerations to both utilitarian and aesthetic design functions.

- **Returning residents.**

Returning residents relocating back to Kenya from a period of time spent abroad also create demand for these apartments and they may be alone or with immediate family. They seek a temporary home while they settle and look for a permanent home or while they await shipment of their luggage. Their key demands include flexible accommodation with preference to single hotel rooms or apartments, local news from TV and newspapers for reconnection with current affairs, an onsite dinning venue or a private lounge for entertaining guests with some consideration on aesthetics in the space, taxi or car rental services, multiple security features, fast Internet connectivity and recreation amenities.

- **Leisure travelers.**

Even though serviced apartments do not largely target leisure travelers apart from the extended leisure travelers, they comprise mostly foreigners with their influx being strongest during the peak tourism months of November to March and July to August. They typically stay for one or two days in Nairobi often at the start or end of a safari schedule. Ease of access to roads and retail centres are important considerations and leisure demand is particularly susceptible to any kind of security disruptions. Due to fresh insecurity incidents with terrorism and grenade attacks, leisure demand has slowed down in the recent past and transformed into a sub-segment of diaspora residents travelling individually, coupled up, or as a family on vacation especially in the July-August period and in December. They may demand an ambient single unit or a three-bedroom family unit and heavy discounts.

4.5 ENHANCING CREATIVITY AND INNOVATIVENESS THROUGH INTERIOR STYLES.

Guest satisfaction with both design and ambience.

Figure 4.20: Guest satisfaction with design and ambience in the interior spaces.

Source: Field survey.

Majority of the guests (46.7%) were moderately satisfied and were highly concerned with the quality of customer service rendered and amenities, the aesthetic appeal in terms of nice views, flower gardens and spacious clean rooms with finishes that enhanced relaxation and comfort. Conclusively, all the respondent's inputs on how to enhance creativity and innovativeness in the serviced apartment sector through interior styles were also sought. They include;

- Creating awareness in the sector through design.
- Avoiding overuse/replication of styles.
- Embracing ICT.
- Response to changing guests' requirements.
- Encouraging proper interior branding.

CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS.

5.1 Conclusions.

These results indicate that the serviced apartment market is a highly fragmented real estate sub-sector and is still on the rise from the past seven years as we head into the future. Generally, the apartments are becoming more upscale to meet consumer needs but there is lack of diversity in terms of interior style choices being deployed in the interiors. Most of the unestablished apartments have a modern finish/style with tweaks on the general structure and furnishings incorporated in the spaces. Furthermore, there still is a lack of adequate information on design standards/guidelines on what makes up a serviced apartment. Some of the apartments were refurbished but still used the previous concepts of interior styles and materials.

By providing the following criteria for distinctive serviced apartments in regard to the findings, the apartments could; focus on the appropriateness of the materials being used in interior spaces basing on their compatibility with environmental and aesthetic conditions, and their applicability to occupancy and size of the space; they also need to assess the physical properties of design materials which are determined by their physical and visual density, mass and thickness, strength, texture, colour, temperature and pattern before being used in the interior spaces; the apartments could also explore techniques used in fabrication processes, detailing of how design materials and systems are joined and installed, and the craft used to produce different interior works; the use of symbolism should also be considered in the interior spaces through artefacts which carry specific meanings within different cultures and regions, as a means to promote diversity in the sector.

Generally, there also lies opportunity in reviewing current building design codes with other stakeholders in the serviced apartments sector, especially the government, since this will ensure that the changing needs in the country are met. Lastly, the unestablished apartments could consistently review their interior style effectiveness in relation to lowering guest turnover, so as to improve the customer experience through better ambience and services, as what is being done in the established serviced apartment brands.

5.2 Recommendations.

By determining ways of enhancing creativity and innovativeness through interior styles, measures proposed to strengthen the sector can only be achieved by understanding and addressing the underlying issues, which are the lack of adequate information and design diversity in the sector. They include;

- Awareness creation through interior design forums/outlets.

This can be done by providing information from various design platforms like the home expos and magazines, that target potential investors and apartment owners in the serviced apartment sector. The information provided may encompass styles already present in the market and those which can also be incorporated in the apartments, together with proper installation of sustainable materials in specific areas in the interiors, which will enhance customer experience in the long run.

- Localization of styles into Afrocentric themes/styles.

By working with other stakeholders in the sector like the interior designers and the government, localization of styles in the upcoming/refurbished apartments into Afrocentric themes/styles will enhance diversity in the serviced apartment sector as well as reduce the construction costs significantly. This can be achievable especially through implementation of the Eurocodes – European Construction Guidelines, a step up from the archaic British Standards and Codes of practice for structural engineering. This would allow the use of locally available construction materials like mangrove timber and coral stones among other raw materials, as long as they pass safety and standardization tests.

- Embracing ICT.

Through ICT, the visibility and accessibility of alternative accommodation in remote areas is significantly enhanced. Case in point, through the Airbnb website, people are able to list, find and rent accommodation in over 200 countries. This has led to conversion of houses in various parts of the country into homestay accommodation, creating stiff competition in the hospitality industry and it is vital for these unestablished apartments to embrace the idea to remain relevant in the sector.

- Response to changing guests’ requirements.

Reviewing the needs of different customers (business and leisure) using the apartments and responding to their requirements by providing quality and ambient spaces will definitely enhance their experience. This will involve engaging professionals like designers among other stake holders in the sector to ensure quality standards and the guests’ requirements are not compromised.

- Encouraging proper interior branding in the apartments.

Proper interior branding enables the serviced apartments to relay their identity through tangible and intangible interior style elements and to deliver that brand’s experience to customers. Its effectiveness depends on the co-relation of design elements to create an exclusive and engaging physical and sensory experience with customers, since the brand only defines the serviced apartment but the interior branding expresses the brand.

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APPENDIX 1: Questionnaire administered to the serviced apartments developers/owners, property managers, caretakers or any other developers' representatives.

Masters Research Project.

This questionnaire is in aid of research being conducted by ***Mundia James***, a master's student from the University of Nairobi, Department of Design on ***"An evaluation of interior styles in the serviced apartment sector in Nairobi."***

Any information you give shall be treated confidentially and will be used only for the purpose of the research. Your assistance and cooperation will be highly appreciated.

1. Name of the respondent (optional)…………………………………………
2. Name of the serviced apartment (optional)……………………………………...
3. Age of the serviced apartment…………………………………………………...
4. Mode of ownership of the serviced apartment.

Ownership	Please tick either
Individual	
Corporate i.e. International hotel chain.	

5. Are you aware of any interior styles being used in serviced apartments currently?

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6. What style has been used in the serviced apartment?..
7. Can you describe/characterize the style used in the serviced apartment?

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8. What influenced the choice of style used in the serviced apartment?

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9. Are you aware of any tangible and intangible interior style elements?

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10. How have you used these elements and how have they enabled you to deliver your brand experience to the customers?

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11. What are your key target groups?

Target groups	Select with a tick
Individual business travelers.	
Expatriates, diplomats & corporates.	
Meetings and conference groups.	
Returning residents.	
Leisure travelers.	
Others.	
Total	

12. Do you know of challenges (if any) affecting the serviced apartment sector in Kenya from a design perspective? If so, how can they be addressed?

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Thank you for your cooperation.

APPENDIX 2: Questionnaire administered to guests in the selected serviced apartments.

Masters Research Project.

This questionnaire is in aid of research being conducted by ***Mundia James***, a master's student from the University of Nairobi, Department of Design on ***"An evaluation of interior styles in the serviced apartment sector in Nairobi."***

Any information you give shall be treated confidentially and will be used only for the purpose of the research. Your assistance and cooperation will be highly appreciated.

1. Name of the respondent (optional)…………………………………………………………
2. Name of the serviced apartment (optional)……………………………………………...
3. Purpose of your travel

Purpose	Tick accordingly
Corporate/ Business	
Leisure	
Other	

4. How did you find out about the serviced apartment and are there specific reasons why you selected the apartment?

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5. Are you aware of any interior styles used in interior spaces?

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6. Did the style used in the apartment influence your choice on selecting the apartment?

   ……………(because)……………………………………………………………….…

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7. To what extent are you satisfied with the design and ambience in the serviced apartment?

Satisfaction level	**Select with a tick**
Not at all satisfied	
Slightly satisfied	
Moderately satisfied	
Very satisfied	
Completely satisfied	

8. Are there any challenges you face as a guest in the serviced apartments?

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9. What do you think needs to be done to enhance creativity and innovativeness in the serviced apartments sector through interior style(s), to improve the serviced apartments' brand experience?

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Thank you for your cooperation.

APPENDIX 3: **Interview schedule for various stakeholders in the serviced apartment sector; Interior designers and established apartment owners.**

Opening

- **A. (Establish Rapport) [Greetings]** My name is James Mundia, a master's student from the University of Nairobi, Department of Design, carrying out a study on ***"An evaluation of interior styles in the serviced apartment sector in Nairobi."*** I thought it would be a good idea to interview you, (**respondent name**) so as to get more insight into the study and provide information to various parties in the sector.
- **B. (Purpose)** I would like to ask you some questions in relation to the performance and outlook of serviced apartments in the hospitality sector, with focus on the unestablished apartments.
- **C. (Motivation)** The information provided will be aimed at enabling the unestablished serviced apartments to curve out their own niche and be competitive in the sector.
- **D. (Time Line)** The interview should take about 10 minutes. Are you available to respond to some questions at this time?

Body

(Transition: Let me begin by asking you about your life experiences that have built you up to where you are now**.)**

A. Topic **-** General demographic information.

1. Can you provide a condensed version of your education and career history and how you have ended up here today?

(Transition to the next topic:……………………………………………………………………)

B. Topic – Serviced apartment concept.

1. When did you first become aware of the serviced apartment and extended stay sector?
2. How established is the serviced apartment sector in the country?
3. What is being done in established apartments that keeps them afloat, with oversupply of hospitality space being a key issue in the sector.
4. Focusing on unestablished apartments, how can they be equipped to deliver their brand experience through their interior styles to enable their growth?
5. How can creativity and innovativeness in the serviced apartments sector through interior style(s) be enhanced, to improve the serviced apartments' brand experience.

(Transition: Well, it has been a pleasure getting information from you.)

Closing.

A. Summary of information.
B. (Maintain Rapport) I appreciate the time you took for this interview.
C. (Action to be taken) This is all the information I need. Would it be alright to get in touch with you if I have any more questions? Thanks again.