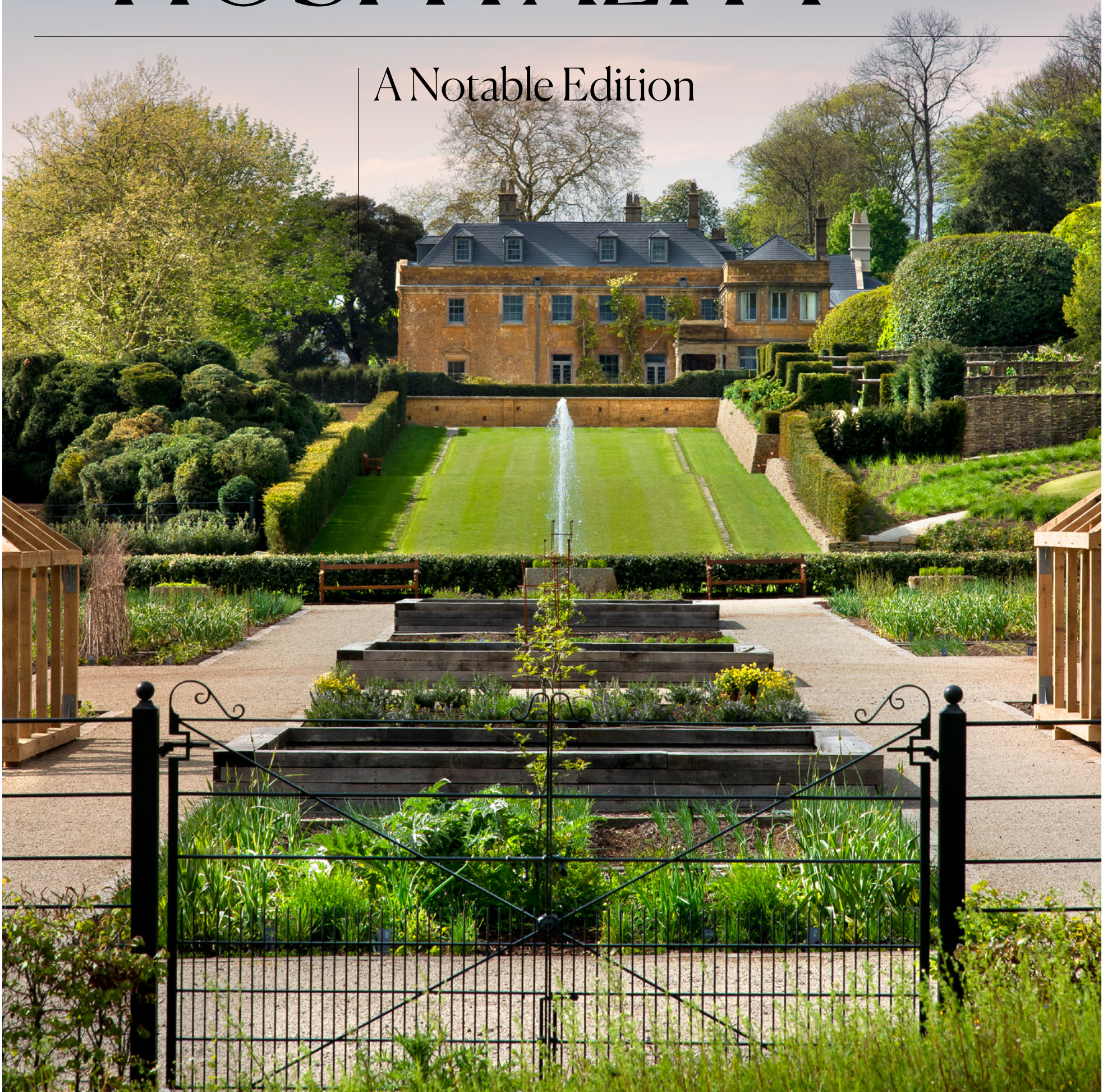


# THE ART OF BRITISH LUXURY HOSPITALITY

A Notable Edition





# HOW FRAGILITY & FLUIDITY ARE RE-SHAPING AN INDUSTRY

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Written and researched  
by brand agency Notable,  
with contributions from  
world-leading luxury  
hospitality experts.

The world is open again and there is cause for celebration, not just within the hospitality industry but also for travellers around the world. Starved of the ability to explore the world, our appetite for travel is back.

In the UK, spending by tourists reached £9.1bn during Q3 of 2022, only 2% below the equivalent pre-pandemic period in 2019. And inbound visits are continuing to increase, now down just 16% in Q3 2022, compared to 2019 volumes (VisitBritain). However, the desire to explore the world again comes with a degree of caution and fundamental shifts in our attitudes towards travel and luxury hospitality.

“We saw a boom in travel bookings last year as people emerged from the pandemic eager to make up for lost time.”  
[Paul Gauger, VisitBritain](#)

No one has come out of the pandemic unchanged. And no one, no matter how wealthy or hedonistic, is blind to the instability in the world right now; be it the war in Ukraine, accelerated climate change or the threat of the next super bug.

Our research has identified two macro themes - FRAGILITY and FLUIDITY - that are influencing our lives at large and therefore our expectations of travel and

luxury. We'd argue that many of the current key trends in the world of luxury hospitality can be traced back to either one or both of these themes.

The roots of FRAGILITY are obvious. We are all more aware of our mortality and of the perilous state of the natural world. This manifests in a strong desire to make the most of life and re-engage with the beautiful world out there, while also wanting to protect it and appreciate it. These two desires can feel at odds but this is where the creativity of more enlightened hospitality providers comes in. Finding ways to allow people to delight in the world and live life to its fullest, yet at the same time 'give back' in some way is the golden ticket.

“People have realised life is short and it is precious. We have to appreciate it while we can. That realisation has re-energised a lot of people to spend on luxury and think about what it means to travel.”  
[Charlotte Keesing, Walpole](#)



01 City-based hotels such as The Londoner are seeing an uptake in guests who want to re-immense themselves in Culture, post pandemic.

FLUIDITY manifests itself in many ways and the blending of work, leisure and family life is an aspect of it that is particularly relevant to hospitality. One upside of the pandemic was to reveal everybody's human side - with family members often popping up on Zoom calls - and a renewed appreciation for family overall. This shift has had many implications for how we define great hospitality. Fluidity also applies to self-identity, particularly when it comes to Gen-Z and their attitudes towards gender, sexuality and cultural background. This has also led to a change in definitions of luxury, wellness and culture.

"The pandemic had the biggest impact of all on the younger generation. They have lost a sense of freedom and immortality. And it's created a shift in expectations."  
Franck Arnold, The Savoy

This paper will unpack the luxury hospitality trends that are stemming from FRAGILITY and FLUIDITY and then explore what role British luxury brands play in these trends.

# MAKE IT COUNT

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## FRAGILITY

There's a hunger to see more of the world but if you're going to do so, make it count; whether that is through what you get out as an individual or what you give back to the world or community, or both.

### 01a GO FURTHER, GO DEEPER

One manifestation of the 'make it count' trend is for more exploratory, adventurous travel that allows you to appreciate the diversity of the world. It's a reaction against the traditional "milk run" of luxurious but predictable holiday destinations that many wealthy travellers followed pre-pandemic. Now, they want to mix it up and reach parts of the world that they have never seen before. To go further and for longer. As a result, there has been an increase in people booking their 'bucket list' destinations today rather than saving them for later in life. More unusual, intrepid destinations such as The Arctic, Rwanda and Gabon are growing in popularity.

"People have learnt the world is a fragile place so let's make the most of seeing it, let's see more of it, let's not just go to the traditional places. People want expert help in planning as they value travel more. It's a worthwhile investment."  
Jimmy Carroll, Pelorus

For well-trodden places such as the UK, there is a desire to find a new twist which allows for a more meaningful connection to familiar places; for example by adding an element of education or history to a trip or properly engaging with the local community. Indeed, research by experiential

travel company The Luminaire, found that 50% of respondents ranked 'satisfying your curiosity about the world' as their top priority when it comes to thinking about travel preferences and a third chose 'teaching your children about life'. These were both ranked far higher than traditional factors such as 'well designed rooms' or a good spa.

"People want to travel and have experiences that broaden their horizons. There's a heightened sense of wanting to continue to learn and to see new things after a period of time when we could not."  
Lee Powell, Cunard

A common need across both intrepid destinations and the 'adventurous twist' on familiar ones is for expert help in planning the trip. The combination of doing something different with a post-pandemic caution around travel, means that precision planning is a luxury that people are increasingly prepared to pay for. When travel means more, getting it right is also worth more.

"The travel advisor is alive and well. The affluent are seeking advice more than ever, for exclusive access but also reassurance."  
Peter Bates, Strategic Vision

"People don't want run of the mill places but as a result, they also don't want to 'go it alone.' they want peace of mind that

someone else has helped in the planning."  
Victoria Carvalho, Ten Lifestyle Group

### 01b THE NEW HOLIDAY PORTFOLIO

All this means that the new holiday portfolio for the luxury traveller looks quite different: a combination of one or two 'go further' trips per year that take people out of their comfort zone, combined with a few 'go deeper' trips to familiar favourites. Some travellers are deciding to do fewer, longer trips - almost a return to the idea of a Grand Tour - vs lots of short trips, as the former are seen as better for the environment and more meaningful because you have time to get under the skin of a destination.

"Our members are doing the big trip but then folding in a staycation or two. It used to be about going abroad for every holiday but that's changed. People have learnt to embrace the staycation but are now adding their 'revenge travel' trips on top."  
Victoria Carvalho, Ten Lifestyle Group

### 01c PROFOUND AUTHENTICITY

Authenticity is not a new trend but there's now a desire for a more profound and more real take on it. At the more adventurous end, profound can mean more "viscerally authentic" experiences, for example, close and extended encounters with endangered





wildlife and remote tribes. At the softer end, it can mean genuine interactions with people from the local community you’re visiting or simply supporting local artisans and producers.

“A sense of place is not enough anymore. People want the essence of a place. To go deeper, to be even more authentic. To engage with the local community.”  
Stephen Alden, Raffles & Orient Express

“People are looking to connect in deeper, more visceral ways. They want to step through the pages of the advert and deep into the worlds they see portrayed.”  
Adam Sebba, The Luminaire

“It’s not just about an experience that’s authentically local, but one that’s bespoke to you. We’re talking super local and super personal.”  
Edward Workman, The Newt in Somerset

In our expert interviews, Ewan Venters of Artfarm explained that creating “community oriented” environments is the key focus for their group as this is where wealthy people want to spend their time. Their new priorities are conversation and connection, with the food itself being almost secondary.

“Smart people now choose restaurants for the environment and sense of community.

The food is second. When they go out, they want a real experience. There’s a desire for meaningful interactions.”  
Ewan Venters, Hauser & Wirth & Artfarm

The search for profound authenticity means that the power of the local, small producer is stronger than ever. Luxury travellers are increasingly dismissive of the presence of bigger luxury brands in hotel environments and look for signs of championing local across everything from food, to cosmetics, to activities. Conor O’Leary, Managing Director at Gleneagles, talked to us about the fact that the tables have now turned. In the past, it was the local producers who tended to rely heavily on working with larger hotels whereas now these hotels are eager to work with local artisans, who provide the mark of authenticity the discerning guest is searching for. Similarly, in the retail environment, the small producer is king and a key draw for enticing the modern, younger luxury customer – at Fortnum & Mason for example, smaller brands such as Devon-based china producers Feldspar are best-sellers.

“Now if I go into a hotel and see big brand toiletries, I think ‘what are you doing? That’s not supporting your community, that’s not authentic’. What used to be a marker of luxury is now a turn off.”  
Lisa Grainger, Times Luxx Magazine

## 01d ELEVATED EXTRAS

The last sub-trend of ‘make it count’ is a willingness to go the extra mile to make holidays as enjoyable and memorable as possible. Affluent travellers are spending on the added extras that will elevate their trip. These can be smaller, more spontaneous add-ons such as champagne breakfasts and room upgrades to bigger ‘elevation’ points such as a once-in-a-lifetime experience at the end of a more sedate holiday. For example, 1-2 nights camping out in the jungle or desert. Similarly, Ten, the luxury lifestyle concierge group, reported that their members are increasingly prepared to pay for extra exclusive elements: it’s not just about eating in the Michelin starred restaurant, it’s meeting the chef. It’s not just the hospitality box at Wimbledon, it’s meeting the players. The Newt are also finding creative ways to delight guests who want more, for example offering entirely bespoke menus for returning guests and organising private tours with partners such as Hauser & Wirth.

“The mindset seems to be if you’re gonna go somewhere, you’re gonna go big. People are upgrading themselves to suites, they’re getting the beautiful vintage bottle of champagne, they’re going for two weeks at a time, whereas beforehand it may have only just been three, four days.”  
Michelle Walder, NoMad London



01

Continued

# MARKET COUNT





o3 Gleneagles' Glorious Playground concept offers an authentically British experience with plenty of charismatic experts on hand.

o4 Jimmy Carroll brings his ex-Army precision planning and British charm to Pelorus adventure trips.

## THE BRITISH ANGLE

### DEEP ROOTS & RICH AUTHENTICITY

Although the UK might not be seen by many as a 'go further' destination, it certainly delivers in the 'go deeper' capacity. Few places on earth have such a storied history and cultural soft power as the UK.

It is well-placed to offer many takes on 'elevated add-ons'; be it ancestral trips (a very popular trend) or cultural one-offs (e.g. backstage access to West-End shows or VIP viewings of world-class Art and Design). Within the countryside offering, the UK has been providing rich authenticity long before it was trendy and therefore has a head start on how to deliver it with genuine depth and expertise.

"Estates in Scotland have been doing (authenticity) for ages because they are so remote. It's come from necessity. They have built menus around what they could get locally. They've invested in local shops. They've been rewilding."  
Lisa Grainger, Times Luxx Magazine

Furthermore, less obvious destinations such as the South Coast, Northumberland and Pembrokeshire are seeing growing interest from luxury travellers who want to experience parts of the UK they see as more 'authentic' than the overly touristy Cornwall or Norfolk.

"Britain excels at history. There is no other place where you get the same fairytale history."  
Lisa Grainger, Times Luxx Magazine

"In the US, authenticity isn't really part of the travelling narrative like it is here in the UK but it is what North American clients want. We are a country far more attuned to issues such as authenticity and sustainability."  
Charles Oak, The Londoner

### 'MAD DOGS AND ENGLISHMEN'

The UK itself might not be seen as an adventure destination but it has a history of producing pioneering adventurers and charismatic characters. Not all the associations with Britain's past expeditions are positive but there is still plenty of cultural soft power in a uniquely British approach to travel; a seemingly contrary combination of military precision and 'mad dogs and Englishmen' eccentricity. It is no accident that some of our leading luxury experiential travel brands - from Pelorus, to The Luminaire - are led by former British Army Officers who bring a winning mix of expert planning and eccentric charm to high-end customers who join their trips. This magnetic blend is something other British brands are well-placed to offer, even with experiences closer to home.

Gleneagles, for example, has a number of ex-military types in their outdoor pursuits team, whose charisma and expertise gives guests a truly authentic, British experience. The Newt is also proud of some of its more uniquely British experiences such as their bonfire night in Autumn where effigies are set alight.

### PROVOCATIONS

How does your brand offer the luxury guest a more meaningful experience? Is it through education? Or community? Or revealing a different side to a well-known place? How is your environment adapting, both indoors and outdoors, to encourage meaningful interactions between people?

How are you helping guests with their travel planning beyond the transactional booking of rooms and tables? How are you taking extra steps to reassure them they can rely on you to deliver the experience they're hoping for?

What is your partnership strategy and how are you staying ahead in terms of talent spotting the best upcoming small producers and artisans that feel truly unique to your property? And once you find them, what can you offer them in return for the 'profound authenticity' they can bring to your brand?

# PROTECTIVE INSTINCTS

## FRAGILITY

“People are still really burnt out post-pandemic and for all sorts of reasons, anxiety is a big issue. We’re trying to address that, to make guests feel safe, allowing them to really relax, not bombard them with too many choices or forcing them to make decisions.”

Andrew Stembridge, Iconic Luxury Hotels

Another post-pandemic trend that looks set to stay is a drive to protect and cherish the people and places that matter to us. This is being expressed in a number of ways within the luxury hospitality space.

05 The Mayfair Townhouse offers guests privacy with all the city has to offer on their doorstep.

06-07 ‘Fun for all the family’ activities at Gleneagles encourage quality time and build long-lasting memories.





## 02a PAMPERED PRIVACY

The desire for privacy was already a trend pre-pandemic but this has only heightened following a period when we have all been more cocooned than ever. The traditional concept of a hotel, which involves sharing a communal space or corridor with others, suddenly feels invasive and the opposite of luxurious. Instead, luxury travellers want the so-called “own front door” experience but with the luxury service extras you’d expect from a top hotel. Furthermore, the service needs to feel more bespoke than ever. Knut Wlyde, from The Berkeley, referenced that the luxury guest increasingly wants to feel like “they’re the only one in the hotel or restaurant”, both in terms of privacy but the level of personalisation they expect from the service. In response, The Berkeley has introduced a “freedom to surprise” programme where staff are encouraged to create moments of delight for guests, with no cap on the budget they can spend on doing so.

11 Cadogan Gardens, part of the Iconic Luxury Hotels Group, is another example of offering pampered privacy. The luxurious aparthotels provide private entrances and kitchens but also access to the best concierge services London can offer. The Twenty Two, also in London, is another property centred on privacy and discretion. It describes itself as a ‘West London hideaway’ and includes 31 private rooms, a Mews House, a Butler and Concierge service and a Private Members’ club.

An important feature of privacy is also access to private, outdoor space, even if this is in the form of a small terrace or balcony within city establishments. In the country, the demand for places with private gardens, pools and even better, an entire Estate, is greater than ever. This means that many British Estates are rushing to upgrade previously neglected properties on estates such as gatehouses and workers’ cottages, which offer both space and privacy within the refined setting of the Grand Estate. Lisa Grainger, from The Times Luxx, believes the UK has been slower on the uptake of this trend and lags behind destinations such as Mauritius, Thailand and Greece, who have been offering the private villa with added extras set up for years now.

“We now want the best of both worlds - privacy of our own space but the amenities and luxury of a hotel. Having people next to you in a hotel or down a long corridor does not feel like luxury anymore.”

Lisa Grainger, Times Luxx Magazine

“People are looking for space and privacy with a real focus on the outdoors. I now look specifically for properties that have good outdoor terraces, balconies and gardens.”

Stephen Alden, Raffles & Orient Express

## 02b THE UNBREAKABLE FAMILY UNIT

A renewed emphasis on family, both in nuclear and extended forms, is a huge trend in luxury travel. Now, families want to not only holiday together but spend time together during that period. The days of throwing the children into a kids club or palming grandparents off on a cruise are diminishing. Instead families want to engage in shared activities that provide quality time with each other. For luxury travel operators, this means offering highly personalised and multi-faceted itineraries that provide something for everyone. For example, a trip to the Antarctic may involve the whole family spending an afternoon helping scientists with their penguin research, where both children and parents learn and experience something new.

A sub-trend here is so-called ‘silver revenge travel’ where grandparents, who were starved of human interaction and the most isolated group during the pandemic, are splurging on trips with their much-missed family.

Group travel doesn’t only apply to the family unit. Our research also found that groups of friends or 2-3 families travelling together is growing in popularity as people seek to reconnect. At the luxury end of the market, travelling with friends also increases the options to rent out an entire wing or part of a hotel, thereby providing a cost effective way to guarantee privacy.





02

Continued

# PROTECTIVE INSTINCTS





## 02c KEEP THEM CLOSE

Renewed appreciation for those that matter doesn't just apply to family and friends. In the hospitality industry, the value of highly skilled and dependable staff is higher than ever. This isn't just due to staffing challenges but also an understanding that in luxury hospitality, the people are everything. We heard that post-pandemic, people really want to trust those looking after them. There is therefore even greater emphasis on what Andrew Stembridge, of Iconic Hotels, calls "wholesome, human to human service"; the kind that feels effortless but is the result of brilliant training. As a result, we observed a strong focus on retaining good staff and playing the long game when it comes to investing in people.

"It used to be the guest is king. But now all colleagues and staff should be treated at the same level as the guest."  
Franck Arnold, The Savoy

"The big change is how hotels are investing more than ever in their teams. We are almost wholly reliant on a UK-based workforce and although I would like to think we have always been an exemplary employer, the need to take care of every member of the team has never been greater, with a renewed focus on growing our own and promoting people from within."  
Andrew Stembridge, Iconic Luxury Hotels

"People want genuine, attentive, caring, knowledgeable service but the biggest threat to UK hospitality is talent. If the UK could develop homegrown talent that is interested in making a long-term career out of hotels that would help. We need to treat people well, invest in back-of-house and play an active role to preserve the best aspects of our business."  
Stephen Alden, Raffles & Orient Express

## 02d LOVE THE EARTH

It's not just people who are gaining from our heightened protective instincts. Although not a new trend, sustainability is still a very important part of any luxury hotel's agenda and now the imminent threat to our own health is subsiding, attention is moving back to how we can protect the earth.

Some would argue sustainability should now be a given in the luxury sector but finding creative ways to actively improve the environment (as opposed to just minimising damage) can still be a point of difference. And importantly, a story that luxury

consumers are seeking. For many corporate luxury customers, sustainability is not only a nice-to-have but a must-have part of company booking policies. The Londoner explained that people are doing serious research into sustainability and "corporate customers in particular, insist on knowing what we're doing. We get lots of serious conversations about how green we are."

"If we don't care enough about the environment, then we'll lose future audiences."  
Franck Arnold, The Savoy

An area of sustainability where the UK leads, is food and drink. The high percentage of flexitarians and plant-based eaters in the UK (according to You Gov, 20% of young people aged 18-24 in the UK do not eat meat at all and a further 20% identify as flexitarian) is a key driver to create more environmentally friendly menus. The UK is now home to some of the original pioneers in this space including The Pig, whose 25 mile menu started way back in 2011. And more recently The Newt, who challenge their staff to come up with ingenious ways to produce more from within their own grounds (including building a special hydroponic greenhouse so tomatoes and aubergines can be grown year-round, rather than flying them in).

### THE BRITISH ANGLE

#### UNBEATABLE DISCRETION

There are few nations better at discretion than the UK and so it is well-placed to deliver the privacy desired by the luxury traveller today. Britain's reputation for steadfastness and stoicism, as well as an unparalleled history in delivering high quality hospitality, provides comforting reassurance against a backdrop of fragility. The comfort and privacy the UK hospitality sector offers is multi-faceted: it's intrinsic to the built environment, via the multitude of hotels that were once houses and therefore offer private nooks and crannies and a cosy feel. And it's inherent to the British style of service that is a unique mix of being utterly attentive yet non-invasive.

"British brands are in a really strong position to meet this trend for intimacy and privacy - the UK thinks smaller, works smaller compared to the US for example. Many UK hotels were once private houses, which lends itself to creating a home from home feel. But so is the service, rooted in good old-fashioned hospitality which has discretion, delivered with sincerity and doesn't feel transactional."  
Andrew Stembridge, Iconic Luxury Hotels

### PROVOCATIONS

How are you adapting your built environments to allow for more private areas, both in terms of rooms and villas but also within communal spaces. How are your spaces allowing for different types of privacy - from precious family privacy to business privacy?

How can you cater for the different members of the 'unbreakable unit', ensuring that throughout the course of a stay, each family or group member feels like they've done something special for themselves as well as spent quality time doing things together?

How are you re-thinking how you treat and train staff to engender long-term loyalty?

Sustainability has to be part of your story but consider what angle on it is authentic and credible for your brand.

o8 The Newt's commitment to sustainability includes growing as much produce as possible on site.



# FLUID LIVING, FLUID LUXURY

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## FLUIDITY

For luxury hospitality, the most pertinent areas of fluidity are: fluid lifestyles (the blend of work, family and leisure), a hybrid approach to wellness and an ever-shifting definition of luxury itself.

09 Mount Street offers guests a range of beautifully designed, art-filled spaces for their blended lives.

10 The Londoner's 'urban resort' concept offers a modern, hybrid approach to wellness.

11 The library at The Nomad provides a hideaway for business or leisure, catering to blended lifestyles.







## 03a THE BLENDED LIFE

The so-called ‘bleisure’ trend started before the pandemic but it has new relevance and meaning. Some argue that it needs a new name altogether, with terms such as ‘lisness’ (coined by Black Tomato, to make the point that ‘leisure’ is the driver of this behaviour) being thrown into the ring. Terms aside, the blending of family, work and leisure is now the norm. The big shift though is on priorities: rather than leisure and family time being the afterthought or ‘add-on’ at the end of a business trip, many high fliers are putting family and leisure time first and seeing how work can best fit around that. Now that flexible, remote working has been established worldwide, people are booking longer stays in places where they can holiday with the family and work remotely at the same time. This connects strongly to the privacy trend: if a location is also an office, confidentiality to make those important business deals in peace and in private is essential.

“Corporate travel combined with pleasure is huge. Now, 80% of our corporate travellers bring their partner or family and extend their stay, which is great for business. It helps we call ourselves an ‘urban resort’ so there is loads to do beyond business. Now we always ask the corporate traveller ‘will you be travelling with someone else?’ and we can upsell another programme.”

Charles Oak, The Londoner

## 03b HYBRID HEALING

Wellness has taken on new significance and meaning. Rather than being an indulgence, it is now a serious business and seen as an investment in long-term health. People are now educating themselves and opening their minds to many different paths to wellness. There is an understanding that there may not be one, set route to optimum health and that it is now as much about mental fitness as physical fitness. Luxury spas are adapting at a pace and beginning to understand that offering set routines is no longer true ‘luxury’. Instead, the conversation starts with “how are you feeling? Are you anxious, stressed, bloated?”. Many British luxury establishments are now offering hybrid, bespoke programmes which take the best

therapies and therapists from around the world including Chinese medicine, Ayurvedic healing and Shamanic practices. For example, Corinthia in London offers a so-called Modern Alchemy treatment inspired by the lunar cycle and includes a hybrid blend of different cultural medical practices. Similarly Beaverbrook’s latest programming includes a Wim Hof Method Day, naturopathy and breathwork. Gleneagles is also finding ways to inject innovative new ideas into its Glorious Playground concept, including emotionally and physically beneficial experiences such as silent hikes and wild swimming. Its sister property, the Gleneagles Townhouse is also taking innovative wellness seriously, offering treatments such as cryotherapy and infrared saunas.

“There is a movement of people realising that our (Western) version of wellness is not the only way. Why see one Doctor when you can see four?”

Lisa Grainger, Times Luxx Magazine

“From a spa perspective, we now focus on offering bespoke treatments, which inevitably leads to a more exclusive experience and delivers enhanced enjoyment and results for our guests. Historically, product houses have dictated strict rituals and routines, and our approach gives our therapists the autonomy to use all their skills, ensuring that the treatment they deliver is responding to our guests’ exact needs and wants.”

Andrew Stembridge, Iconic Luxury Hotels

## 03c SHIFTING SANDS, SHIFTING FORCES OF INFLUENCE

As our identities, lifestyles and attitudes shift, so too does our definition of luxury. As Ewan Venters put it, there is a “yearning for intimacy” and connection that is less superficial than previous iterations of luxury, as well as an openness to more varied and more fluid experiences.

The driving forces of luxury hospitality are shifting and it can now spring from a much wider pool of talent, places and industries. For example, food, fashion and art are increasingly the *raison d’être* vs an add-on. Restaurant-driven British brands such as

Nathan Outlaw and Tom Kitchen are great examples of this. Food is their core offer and other luxury elements such as accommodation and exclusive experiences, like cooking with the top chefs in their kitchen, have been successfully added into the mix. Hauser & Wirth were pioneers in the art-led hospitality but there are other brands opening up around the UK including Margate’s Fort Road hotel, owned by the artist Tom Gidley and Frieze co-founder Matthew Slotover. In fashion, mega brands such as LVMH are expanding their hotel offering but smaller, fashion-led lifestyle brands such as Alex Eagle are also turning their hand to hospitality – see her joint venture with interior designer Sophie Hodges at Oakley Court, Windsor, where fashion, interiors and hospitality merge (the fabrics and tableware used in the hotel can also be bought in Eagle’s boutique, for example). In the other direction, hospitality brands such as the Pelicano group are increasingly influential in the fashion world, with partnerships with the likes of Birkenstock and Aquazzura. Beyond food, fashion and art, there are other forces growing in influence too, especially in the education and self-improvement space. All worlds are colliding and modern luxury travellers are set to gain from this melting pot.

“The standard luxury template has ended”  
Alex Schellenberger, Accor Group

“Where did you eat vs where did you stay is the big question now. Eating matters so much more.”  
Victoria Carvalho, Ten Lifestyle Group

Connected to this changing definition of luxury is an increasingly fluid use of space. Hybrid spaces that are part restaurant, part members’ club – the so-called Clubstaurant – or hotels that are part members’ club, part residence, part hotel are popping up everywhere. Demanding luxury customers want everything under one roof and to dip in and out of their various tranches of luxury easily and fluidly. Innovative new examples of this include The Other House, which describes itself as a ‘residents’ club’ and offers a combination of so-called Club Flats as well as a Private Club with exclusive experiences attached.



03

Continued

# TRUNKS & LUGGAGE





12 The Savoy's Gucci collaboration breathes new life into the heritage hotel and attracts new, younger travellers.

13 Eagle & Hodges joint venture at Oakley Court blends the worlds of fashion, interiors and hospitality.



THE BRITISH ANGLE

CULTURAL MELTING POT,  
CREATIVE FORCE

The UK is well-placed to respond to this trend. Although it has its fair share of more traditional institutions, the UK has always been a leader when it comes to progressive culture, creativity and multiculturalism. London in particular is a global force when it comes to fashion and artistic talent. Further afield, in more rural locations, the UK excels at the creativity and innovation of smaller artisan producers and craftsmen. Consequently, the bigger hospitality brands in the UK have a wonderful pool of rich and varied talent to tap into in order to offer the more expansive, fluid version of luxury their clients are seeking.

THE BRITISH ANGLE

EVOLVING HERITAGE

“The Brits are masters at building bridges between heritage and modernity.”  
Alex Schellenberger, Accor Group

Does all this fluidity and change leave room for the role of tradition and heritage in luxury hospitality? Yes, if that heritage is seen as an ever evolving quality that can be reimagined in sync with societal shifts. The UK is masterful at blending seemingly opposing forces; respectful yet rebellious, eccentric yet dependable, historical yet modern. It is perfectly positioned to find ways to blend

heritage with modernity. The brands that excel at this are the ones that are prepared to wear their heritage lightly and to be open-minded. Fortnum & Mason is a great example of a brand that is experimenting with how to ‘loosen up’ in order to offer new iterations of luxury hospitality. Initiatives such as their Supper Clubs, where they invite young chefs into the traditional surrounds of the store and serve up high quality but informal fare (such as chicken wings) is bringing a new generation to the store and shifting expectations of the heritage brand. Similarly, The Savoy is acutely aware of the need to change and evolve, whilst maintaining what makes the hotel so special. Their belief is that change is a constant characteristic of Britishness. Rather than progressive initiatives (such as loosening the dress code for tea) ‘threatening’ heritage, The Savoy believes they are in fact why the hotel has stayed relevant for so many years.

“Luxury needs to be daring. You cannot suffer change. You need to provoke change.”  
Franck Arnold, The Savoy

“We’re so proud of our heritage but I want us to be a business that looks forward rather than looking backwards for success. We need to be unexpected sometimes.”  
Tom Athron, Fortnum & Mason

PROVOCATIONS

How are you taking a ‘leisure’ first approach to ‘bleisure’ and shifting mindsets in

accordance with shifting customer behaviours and priorities?

How are you staying ahead of the latest developments in wellness, particularly when it comes to new practices from around the world? How are you marrying your Britishness with practices from around the world to create a coherent and authentic wellness story?

How are you collaborating with new ‘forces’ of luxury from the worlds of fashion, art and food?

How are you provoking, rather than just responding to, change?

CONCLUSION

The appetite for travel is back but we’re dealing with a different world and a changed affluent customer. There are challenges associated with this shift - change is never easy - but also huge opportunities. This is a moment where humanity and creativity can shine. The companies that are able to soothe our still fragile selves but also reinvigorate us with stimulating and meaningful interactions, are the ones who will thrive. Thankfully, many of the enduring qualities of British luxury hospitality - from world-class service, to true commitment to local communities and producers, to the unbeatable cultural and creative soft power, to leading-edge innovation - mean that the UK is in a prime position to do just that.



Laura Tan  
Partner - Notable

“We’re more aware than ever that travel is a privilege. And therefore so is the role of making it happen for others. Let’s use this position of privilege to repair our fragile world and leave it in even better shape for the next generation of travellers to enjoy in all its glory.”

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