

F&B & Hospitality Trends Report 2026



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Introduction

Defining value is becoming increasingly complex. Changing lifestyles, tighter budgets, growing concerns over global stability and a deeper focus on wellbeing are all reshaping how people measure quality and meaning.

From choosing a restaurant to booking a hotel, guests now consider a broader set of factors when deciding what feels worthwhile. Does an experience fit my needs? Does it express my values? Does it justify my attention?

Within this context, a growing preference for access over ownership is a notable shift in how people engage with hospitality. Many now seek participation and freedom of choice over permanence or possession, connecting with brands more intermittently rather than through long-term commitment.

At the same time, the familiar still holds deep appeal. Guests continue to return to places that feel personal and grounded, where hospitality remains human-led and where comfort and design create a sense of belonging.

Guests continue to return to places that feel personal and grounded, where hospitality remains human-led and where comfort and design create a sense of belonging.

It's why neighbourhood cafés, family-run restaurants and even the traditional British pub continue to hold appeal, offering warmth, continuity and reassurance amidst constant change.

We believe the rise of micro-indulgence also reflects this same balance between flexibility and familiarity, the growing appreciation for small, intentional pleasures and experiences that offer reward or restoration without excess.

At the same time, people want places that meet emotional needs as much as functional ones. They look for environments where they can feel seen, connected and part of something. The desire for belonging, especially in a period marked by loneliness and social fragmentation, is becoming one of the strongest influences on where and how people choose to spend their time.



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Introduction



Meanwhile, it now encompasses health, sustainability, happiness and social connection, influencing how spaces, brands and experiences are designed. Collectively, these developments reveal a hospitality landscape in which value is expressed increasingly through emotional relevance and alignment with personal priorities.

As a result, hospitality itself is widening. Hotels are rethinking their role through stronger food and beverage concepts, cafés are being built from the ground up as third spaces for work and play, and growth of the food hall market shows no signs of stopping, with these hubs now serving as neighbourhood anchors that combine dining, retail and culture.

At the same time, other sectors, from fashion and residential to entertainment, merge further into the world of hospitality, leading to even more multifunctional formats and environments where boundaries between categories are fluid. And across all of this, we are pleased to see strong consensus around the vital role of F&B in making assets and destinations thrive, from malls and high streets to urban districts and major events.

We have seen Gross Leasable Area (GLA) for F&B increase from 15–20% to 40–50% as dining becomes a larger priority within mixed-use developments and early-stage masterplans.

Gross Leasable Area (GLA) for dining continues to expand, F&B is being integrated earlier into masterplans and hotels are investing more heavily in restaurants, bars and culinary programmes to strengthen identity and guest experience.

In this fourth edition of our trends report, we reflect on the dynamic landscape we continue to operate in. Drawing on insights from across our global teams and projects at TGP International, and supported by internal data and industry benchmarks, we explore the major trends shaping the sector today along with the equally important sub-trends and emerging signals that suggest what will come next.

Few sectors today remain untouched by F&B, as the principles of hospitality increasingly shape how industries evolve and connect with people.

- Simon Wright, Founder & Chairman at TGP International



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Rethinking Value

Macro Trend

Some guests are driven by discovery and a sense of adventure, while others find meaning in consistency, ritual and trust.

We also know that periods of uncertainty often bring guests back to the familiar, toward classic cuisines like French and Italian, and household brands that feel established and “safe”. But when confidence returns, curiosity often follows. Appetite for fusion, experimentation and play grows, and guests seek out concepts that challenge or surprise them.

We see a clear correlation in how brands have responded. Some are leading with bold, forward-looking concepts that push creative

and experiential boundaries, while others are looking inward, drawing on their heritage to redefine value. In these instances, heritage storytelling and revived visual identities are being used to convey authenticity and trust in markets crowded with new entrants.

Our work with brands like Ten 11, Diplomat Sweets, Kudu, Barns and The Sloane Club shows how legacy can be a source of great potential. By drawing on their heritage while adapting for contemporary audiences, these brands create experiences that balance nostalgia with novelty, offering comfort and discovery in equal measure. And often within the same visit.



Our work with brands like Ten 11, Diplomat Sweets, Kudu, Barns and The Sloane Club shows how legacy can be a source of great potential.

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Stepping back, dining itself continues to be regarded as inherently valuable, retaining emotional and cultural significance. Even as people become more cautious with spending, dining out remains one of the most resilient discretionary “splurges” under economic pressure (1). And in the Middle East, dining out frequency remains among the highest globally, with more than 40 percent of consumers eating out one to three times a week (2).

At the same time, the growing appeal of access over ownership and the rise of the micro-indulgence economy are changing how value is framed. Guests increasingly seek ways to participate in their idea of luxury for a day, a weekend or even a moment.

This is evident in models like membership-based dining clubs, limited-time menus and short-stay formats. In a culture that prizes both what’s new and what feels meaningful, it is interesting to see how value is often found in the fleeting and momentary.

Operationally, these changes have added complexity and demand agility behind the scenes. To work well, concepts rely on adaptable systems like modular kitchens, scalable teams and menus that balance efficiency with experimentation. Hybrid service models blur the line between full-serve, self-serve and takeaway, requiring staff to move fluidly between roles.

Yet nowhere is the re-examination of value more visible for us than in the hotel sector. Many operators at both brand and property level are rethinking the guest experience and how to position F&B as a strategic asset rather than a peripheral service. New in-house concepts are being developed, breakfast programmes are being overhauled and partnerships with established F&B brands have increased, all aimed at better aligning with evolving guest expectations.

Wellness, too, continues to influence how people perceive value. Over 80 percent of global consumers name wellness as a top life priority, and 42 percent describe it as a “core value” shaping where they stay, eat and spend (3). Even traditionally cautious operators are now integrating wellness more intentionally through design, menus, storytelling and sustainable operations.

Our collaboration with Loui Blake and Long Lane captures just how dynamic this space has become—a wellness-led hotel and lifestyle concept that positions health and holistic wellbeing as a core value. The rich and vibrant community forming around it, even before opening, illustrates the level of purpose and connection people now seek from hospitality.

79%

People globally say they’re being cautious with spending

Source: The JLL Global Consumer Experience Survey

80%

Of global consumers name wellness as a top life priority.

Global Wellness Institute, The Global Wellness Economy: 2025 Report, 2025

40%

Of consumers in the Middle East eat out 1–3 times per week.

PwC Middle East, Voice of the Consumer 2025: Middle East Findings, 2025

33%

US and UK consumers expect the economy to worsen soon

GWJ (Global Web Index), Retail Report 2025, 2025

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Key Sub-Trends

● Emerging Signal ●● Gaining Ground ●●● Established

●

Anti-Spas

Wellness spaces designed with masculine aesthetics focusing on recovery, fitness and functionality over pampering or indulgence.



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Access Over Ownership

Participation replaces possession, from clubs to short-stay wellness programs offering flexible entry.

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The Ozempic Effect

Appetite-suppressing lifestyles shift dining toward mindful portions, simplicity and moderation.

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Evolving the Flavour Wheel

AI transforms flavour creation, enabling chefs to design mood-based, hyper-personal taste experiences.

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Slow Escapes

Short breaks prioritising rest, nature and local immersion, replacing status-driven vacations — time as restoration, not display.

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Selective Engagement

Consumers become more deliberate in how and when they spend, seeking purpose-driven engagement with brands.

●●

Emotional Currency

Consumers increasingly measure value through emotional return — calm, inspiration, connection — rather than financial worth.

●●

Wellness F&B

Menus that support balance, nourishment and everyday wellbeing are increasingly sought after by guests and offered more widely by operators.

●●

Quiet Luxury

Elevated experiences that prioritise minimalism, discretion and sensory refinement.



●●

Semi-Private Sociality

People increasingly want privacy without isolation, to see and be seen, but on their own terms.

●●●

Better Hotel F&B

A focus on elevating and adapting traditional forms of hotel dining, from restaurants to breakfast buffets.

●●

Heritage Revival

Brands draw on their legacy, blending heritage and craftsmanship with a contemporary refresh to stay relevant to modern audiences.



●●

Micro-Indulgence Economy

Small, intentional pleasures that offer a sense of reward or restoration without excess.

Industry Inspiration



“

Long Lane began as a response to what we saw happening all around us. Modern life is moving faster than ever, yet people feel more disconnected—from their health, their purpose and each other. The wellness industry is expanding rapidly, but much of it still feels transactional, with short-term fixes instead of long-term foundations for living well.

I wanted to explore what it would look like to build something different. A place where wellness is deeply woven into the concept, impacting everything from design to operations.

Working alongside my business partner Harrison as well as my partners at TGP International, this has been an opportunity to blend hospitality, design and wellness to create the conditions for deeper connection—to self to others, and to what matters most.

Although we already have an incredible community, Long Lane is still taking shape. The intention is to create an environment that embodies balance and vitality, not escape. We’re drawing from ancient practices and new technologies, blending them into spaces and rituals that make wellbeing tangible and lived, not abstract or performative.

The project sits within a movement towards brands and spaces that provide real value and meaning—away from classic concepts of luxury and indulgence towards simplicity, purpose and alignment. My hope is that Long Lane becomes a living example of how we can reimagine wellness not as a retreat from life, but as a better way to live it.

- Loui Blake, Co-Founder of Long Lane



Food For Thought

When freedom of choice defines one form of value and familiarity defines another, how do brands balance both?

Experience as a Premium

Macro Trend

We can't speak about value without speaking about experience. Across the industry, experience and the experiential now define value more than ever. In the wider experience economy, 69 percent of consumers globally say they are willing to pay a premium for high-quality experiences (4).

Beyond classic definitions of indulgence or luxury—which still have their place—experience today is just as much about refinement and restraint. For some, it's found in calm, well-composed spaces where menus feel intentional and gestures of service are thoughtful. This nuance is reflected in traveller data showing that luxury guests increasingly favour distinctive,

design-led environments over traditional opulence, redefining what modern luxury means (4).

Design intent is crucial. The development of new concepts that embrace understated luxury, alongside the subtle re-luxuriation of existing venues, reflects a clear difference in how sophistication is expressed today—through calm, refined interiors and shorter, elegantly understated menus that convey confidence.

But delivering this atmosphere requires thoughtful strategy and cohesion, with alignment across every layer, from concept and brand to interior design, marketing and service.



Beyond classic definitions of indulgence or luxury—which still have their place—experience today is just as much about refinement and restraint.

Behind the scenes, such refinement depends on invisible choreography.

The most successful F&B concepts are built to balance theatre with performance, aligning everything from materiality, lighting and zoning to details like tableware curation and staff training. Together, these elements shape how guests feel in the space and how seamlessly the experience comes to life.

The same principles also apply at larger scales, as seen countless times at Expo City Dubai where the open-air space beneath the iconic Al Wasl Plaza Dome shifts effortlessly between high-energy event activations like the region’s first Festival of Cake and quieter, reflective moments, illustrating how rhythm and adaptability can shape the guest experience at a destination level.

Behind the scenes, such refinement depends on invisible choreography. Cross-training, coordination and real-time communication maintain the flow of service that feels effortless yet requires precision.

This layering of theatre, authenticity and intimacy continues to strengthen the bond between service and concept narrative, as restaurants, hotels, cafés and event spaces weave storytelling through music, rituals and pacing to create experiences that feel both personal and purposeful.

Technology plays an important supporting role. Integrated CRM and guest data systems allow venues to anticipate needs, personalise experiences and build continuity across visits.

More than half of consumers (53 percent) say that sharing personal information is worthwhile when it leads to more tailored and meaningful experiences (5), signalling a growing comfort with data sharing when it enhances human interaction rather than replaces it.

At the same time, the competitive socialising market continues to grow, with 41 percent of visitors to these venues now attending at least once a month, up from 35 percent in 2023 (6). These hybrid concepts that merge food, drink and play appeal to guests seeking interaction and novelty, while operators increasingly use nostalgia to deepen engagement.

The most refined expressions of luxury are sometimes the quietest, what’s important is that meaning is created through cohesion, from concept and design to service, making the experience feel both effortless and deeply intentional.

- Gabriel Murray, Creative Director at TGP International

69%

Consumers globally are willing to pay more for high-quality experiences

JLL, Experience Matters: Global Consumer Experience Survey 2025, 2025

53%

Consumers say sharing data is worth it for personalised experiences

PwC, Customer Experience Survey 2025, 2025

41%

Visitors to competitive-socialising venues go at least once a month

KAM Media, The Competitive Socialising Report 2025, 2025

59%

US consumers prefer spending on luxury experiences over products (68% for ages 18–34)

Mintel, Global Food & Drink Trends 2026, 2025

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Key Sub-Trends

● Emerging Signal ●● Gaining Ground ●●● Established

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Adrenaline Dining

Consumers embrace intense, high-sensory dining and controlled risk as forms of excitement and release.

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Extreme Edibles

Bold flavour pairings, textures and aromas that create playful, high-impact experiences.

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Mood-Responsive Hospitality

Ambience, service and menus that adapt fluidly to mood or moment.

●●

Experience-Led Operations

Operational metrics shift from output to experience quality — dwell time, guest mood, memory.

●●●

Experience Economy

Guests prioritise memorable, emotionally resonant moments over physical possessions or transactions.



●●

Intimate Rooms

Small, private spaces designed for comfort and connection, offering guests a sense of privacy and exclusivity within larger venues.



●●

Gastro Tourism

Travel driven by food experiences—where local cuisine, producers and dining culture become the primary reason to visit a destination.

●●

Invisible Service

High-touch service delivered through quiet precision — fewer visible staff, greater training depth, and seamless backstage coordination.

●

Ephemeral Luxury Formats

Limited-time experiences, pop-ups and one-off moments that create value through rarity and impermanence.

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Wellness Nightlife

Nightlife shifts toward healthier, more relaxed formats with lighter food, alcohol-free drinks and calmer environments focused on wellbeing.

●●

Hyper Local Luxury

Luxury rooted in place, local materials, makers and stories to create experiences that feel exclusive through authenticity.



●●

Storytelling Menus

Multi-course experiences built around a cohesive narrative, where each dish advances a story through flavour, presentation and atmosphere.

●●

Interactive F&B

Experiences invite active participation, connecting cuisine to memory, art, and performance.

Industry Inspiration



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We are thrilled to have launched our very own Festival of Cake in partnership with TGP International. This event is more than a celebration of dessert—it is a tribute to artistry, precision, and beauty. From the careful selection of ingredients to the intricate designs that transform cakes into edible masterpieces, it offers a feast for both the eyes and the palate.”

As the legacy of a global event, Expo City Dubai’s core programming strategy focuses on creating experiences that transcend borders through a universal language.

One of our missions is to unite global art and culture through experiences that everyone can enjoy. We craft moments that connect people beyond language, culture, and ethnicity—transforming spaces like Al Wasl Plaza into living, breathing expressions of creativity and emotion.

- Amna Abulhoul, Executive Creative Director of Entertainment and Experiences at Expo City Dubai



Food For Thought

If guests now define value through experience, how should operators measure the return?

Blurred Formats

Macro Trend

Hybrid spaces are everywhere, emerging from both new developments and the adaptive reuse of existing spaces. As the boundaries between hospitality, retail, work and leisure dissolve, we believe these environments reflect the desire for adaptability and shared purpose over single-use design.

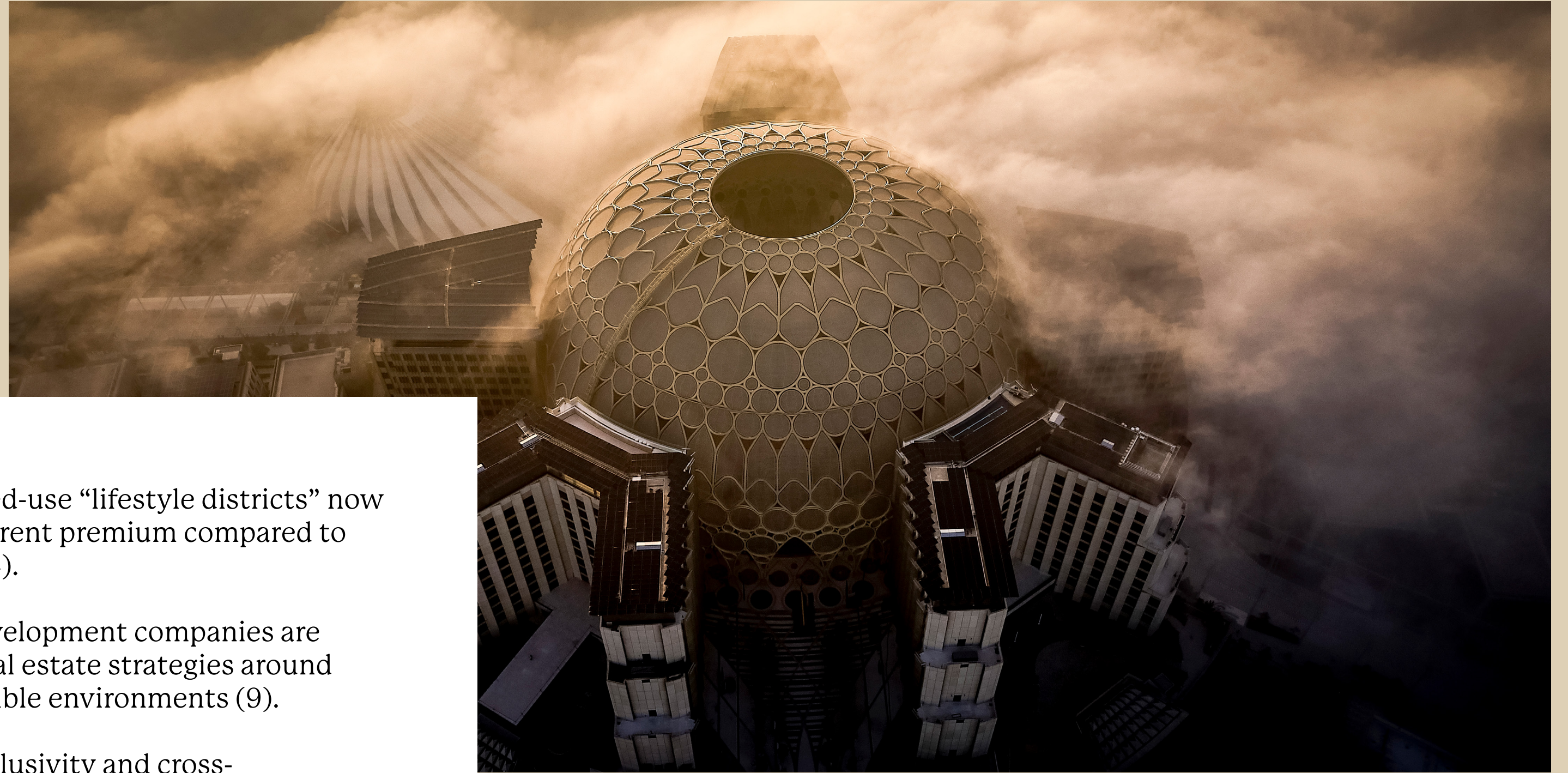
NLA's Adaptive London: Reusing Existing Buildings research highlights how much of the city's renewal now comes from creative reuse (7), while its Tall Buildings Survey 2025 shows that nearly eight in ten of London's newest tall-building projects are mixed-use rather than single-purpose (8).

This mirrors a global movement toward convergence and flexibility, with office properties

located within mixed-use “lifestyle districts” now commanding a 32% rent premium compared to traditional offices (4).

Similarly, 61% of development companies are redesigning their real estate strategies around multi- purpose, flexible environments (9).

As this happens, inclusivity and cross-generational engagement are emerging as defining measures of success in both urban planning and venue design. The goal is not to create spaces that appeal to everyone simultaneously, but to design environments that can flex and adapt to feel equally suitable whether someone visits for work, leisure, family time or solitude.



Development companies are redesigning their real estate strategies around multi-purpose, flexible environments.

Within this context, food hubs and markets have become key anchors of mixed-use districts, acting as social, cultural and commercial hubs. In the U.S., the sector has grown by nearly 9 percent annually since 2020 (10), with similar expansion visible across Europe, Asia and the Middle East, where developers recognise the power of clustered F&B destinations to anchor mixed-used developments, drive footfall and neighbourhood identity.

Other formats tell the same story. Spaces that shift from coffee by day to wine by night—like Coffee then Wine in Madrid, Ernest Café & Wine Bar in Seoul or Hideaway in London—as well as dynamic hotel lobbies such as those at 25hours, which transition effortlessly from workspace to social hub, all demonstrate how hospitality now anchors inclusive urban life. These spaces move fluidly between purposes, creating continuity, connection and shared experience across times of day and for multiple demographics.

We are also seeing residential and entertainment venues increasingly integrate hospitality principles to enhance engagement and atmosphere. Beyond first movers like Harrods, department stores are reimaging floorplans with food halls, cafés and dining areas designed to offer added value to the customer experience. John Lewis, for instance, has announced plans to expand its in-store dining after reporting that one in five transactions now occur in its cafés or restaurants.

In the Middle East, branded cafés have become commonplace extensions of fashion and lifestyle labels—from Armani Caffè and Tiffany & Co Café to Valentino Café, Ralph's Coffee and Dolce & Gabbana Café—reflecting how luxury is being translated into accessible everyday

experiences. Meanwhile, the region's branded residence market is expanding rapidly, with the Middle East & Africa forecasted to grow by 270 percent by 2031, with Dubai alone expected to account for 40 percent of this total (11).

At the same time, higher levels of F&B quality are appearing in almost every category of public and private space, from Abu Dhabi's Ferrari World and Singapore's National Gallery, both introducing diverse, trend-led concepts, to airports and transit hubs worldwide now offering premium dining. The evolution runs both ways with restaurant brands like Nobu and Dishoom expanding into residences and lodgings.

As F&B takes centre stage in shaping experience, it is amazing to see it now serve both as the spark for short-term activations and the foundation for sustained placemaking and district renewal. And for designers, creatives and strategists involved in this work, all of this brings both opportunity and complexity. Spaces must deliver multiple purposes while retaining coherence and identity—flexibility must be built into design, brand and operations alike.

For venues combining dining, retail, events and delivery things like modular kitchens, shared prep areas and integrated digital systems are needed to manage shifting demand, supported by training that unites service with brand narrative.

8/10

Of London's newest tall buildings are mixed-use

NLA, Tall Buildings Survey 2025, 2025

+32%

Rent premium for properties in mixed-use lifestyle districts

JLL, Experience Matters: Global Consumer Experience Survey 2025, 2025

61%

Developers are redesigning real-estate strategies around flexible environments

Cushman & Wakefield, Occupier Survey 2025: Redefining the Workplace Experience, 2025

9%

Annual growth of the US food-hall market since 2020

IBISWorld, Food Halls & Market Halls in the US – Industry Report, 2025

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Key Sub-Trends

● Emerging Signal ●● Gaining Ground ●●● Established

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Night-Day Role Swaps

Venues that change function throughout the day, such as cafés turning into bars or shops into lounges.

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Mixed-Use 3.0

Developers prioritise “experience stacking” of housing, hospitality, culture and commerce designed as interdependent layers.

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Retail Reimagined

Shops evolve into social and sensory venues with in-store cafés, tasting counters and events that blur the line between shopping and dining.

●●

Food Hubs

Food halls evolve into broader social ecosystems with coworking areas, entertainment and retail to build all-day engagement.

●

Wellness Pit Stops

Functional spaces evolve into restorative zones — hydration lounges, nap pods and mindfulness areas



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Perpetual Youth Culture

Life stages blur as older and younger audiences seek similar experiences, from creative cafés to nightlife and fitness clubs.



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Crossover Venues

Cinemas, gyms and entertainment parks integrate dining and lounge concepts to extend the experience beyond a single function.

●●●

Work-Stay-Play Hotels

Hotels designed for hybrid lifestyles, combining co-working, leisure, wellness and F&B to attract locals and travellers alike.

●●

Neuro-Inclusive Design

Spaces designed with empathy for sensory and cognitive diversity, prioritising comfort, calm and choice.

●

Destination Hubs

Airports, train stations and other transit hubs are being reimagined as hospitality-lifestyle spaces, integrating F&B, retail and leisure.

●●

Blended Cultural Spaces

Museums, galleries and libraries add F&B and events programming to offer more rounded guest experiences.



●●

Intergenerational Design

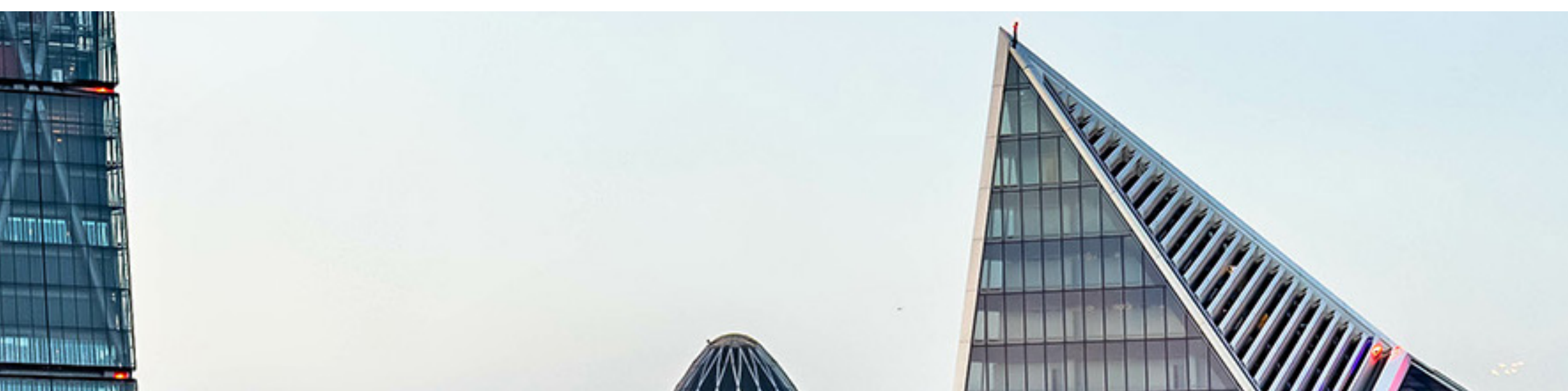
Layouts and experiences designed for all ages.

●●

Branded Residences

Luxury hospitality brands extending into residential living, offering hotel-style services, curated design and community-driven amenities.

Industry Inspiration



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London has always evolved through collaboration across city authorities, planners, developers, investors, businesses and the communities that bring its neighbourhoods to life. The city’s strength lies in this networked approach, where public ambition meets private innovation and local identity.

As the boundaries between how we live, work and socialise continue to blur, partnership become more important than ever. We’re pleased to work with TGP International to explore how food, drink and shared experience can serve as catalysts for connection, shaping places that are not only functional but also deeply human.

In a city where the principles of mixed-use design are high on the agenda, F&B has become a vital part of the urban fabric: a unifying layer that turns buildings into destinations and districts into places of community and culture. By opening up the dialogue through our programme of research and events, we aim to help the sector better understand how hospitality contributes to the resilience and vibrancy of London’s built environment.

— Nick McKeogh, Co-Founder & Chief Executive, NLA



Food For Thought

If every space serves more than one purpose, do we risk losing intention?



Qualified & Curated Communities

Macro Trend

As an interesting counterpoint to increasingly open and plural spaces, there is also growing movement toward exclusivity and qualified communities.

Over 60 percent of high-net-worth individuals now prioritise “access to exclusive experiences” over material ownership (12). Yet exclusivity itself is being redefined. What was once about separation or status is now about connection through shared intent. The “new exclusivity” feels less like exclusion and more like qualification and belonging based on alignment of values, purpose or mindset.

The global private membership market is also expanding rapidly, projected to nearly double by 2033 (13).

Across demographics, there is renewed interest in smaller, purpose-driven communities and in the F&B sector, we have seen this manifest through a surge of chef-led supper clubs and invitation-only dining concepts that function as both creative incubators and social platforms.

Dubai’s acclaimed The Girl and the Goose, is just one example of how the supper club format has been scaled into a sustainable business model built on shared experience and narrative.



The “new exclusivity” feels less like exclusion and more like qualification and belonging.

New wellness-focused membership clubs and collectives are emerging around the world as people look for spaces that align wellbeing with social connection.

Whether supper clubs, coffee shop run clubs, invite-only restaurants or lifestyle collectives, these entities are flourishing as spaces of identity and reassurance. For some, they offer calm and familiarity and for others, they provide access to culture, wellness and creative exchange.

The evolution of Seed & Bloom, a community-led café, reinforces this in practice. Through partnerships with local groups, workshops and club-style programming, the venue has blossomed into a creative and social hub that many love, proof that hospitality spaces can become stronger when they are built with the idea of community at the core.

Wellness also continues to have influence with new wellness-focused membership clubs and collectives emerging around the world as people look for spaces that align wellbeing with social connection.

Operationally, these models demand emotionally intelligent service. Some might describe it as “invisible care”, anticipating needs quietly, maintaining discretion and creating atmosphere through empathy rather than display.

Though high-touch models increase training demands, they build deeper loyalty and brand advocacy, with research showing us that brands that successfully foster a sense of community and belonging outperform peers by up to 40 percent in customer lifetime value (14).



Spaces grounded in purpose and care have lasting impact. When design and operations unite around community, hospitality transforms from spaces people visit to places they feel part of.

- Nichola Beskine-Taylor, Partner & Head of Advisory & Design at TGP International

270%

Forecast growth of branded residences in Middle East & Africa by 2031

Savills, Branded Residences Spotlight: Middle East & Africa 2025, 2025

60%

High-net-worth individuals prioritise access to experiences over ownership

Knight Frank, The Wealth Report 2025, 2025

100%

Projected growth of the global private-membership market by 2033

Future Market Insights, Private Members Club Market Outlook (2023–2033), 2025

40%

Higher customer lifetime value for brands that foster community and belonging

McKinsey & Company, The State of Fashion 2025: The Age of Values, 2025

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Key Sub-Trends

● Emerging Signal ●● Gaining Ground ●●● Established

●

Anti Algorithm Communities

Groups built in resistance to digital curation, favouring organic connection, word-of-mouth and genuine discovery.

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Protected Spaces

Environments that feel emotionally and socially safe, offering privacy without isolation.

●●

Intimacy of Scale

Semi-private social settings that balance visibility and connection with discretion and comfort.

●●

Cultural Curators

Food halls evolve into broader social ecosystems with coworking areas, entertainment and retail to build all-day engagement.

●

Soft Exclusivity

Semi-private social settings that balance visibility and connection with discretion and comfort.

●

Data-for-Belonging

Growing acceptance of data sharing if it helps to create more meaningful community or member experiences.



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Private Members Clubs 2.0

Clubs evolve beyond status toward shared intent, blending hospitality with community purpose.

●●●

Supper Clubs

Chef-led dining circles and invite-only events that blend culinary storytelling with social intimacy, fostering creative community.

●●

Wellbeing Collectives

Groups centred on holistic health, mindfulness and shared lifestyle habits as forms of belonging.

●

Ephemeral Clubs

Temporary, invite-only gatherings that pop up for a season or single event, creating exclusivity through scarcity.

●●

Micro Communities

Niche circles form around shared passions, from food and art to wellness, prioritising intimacy over scale.

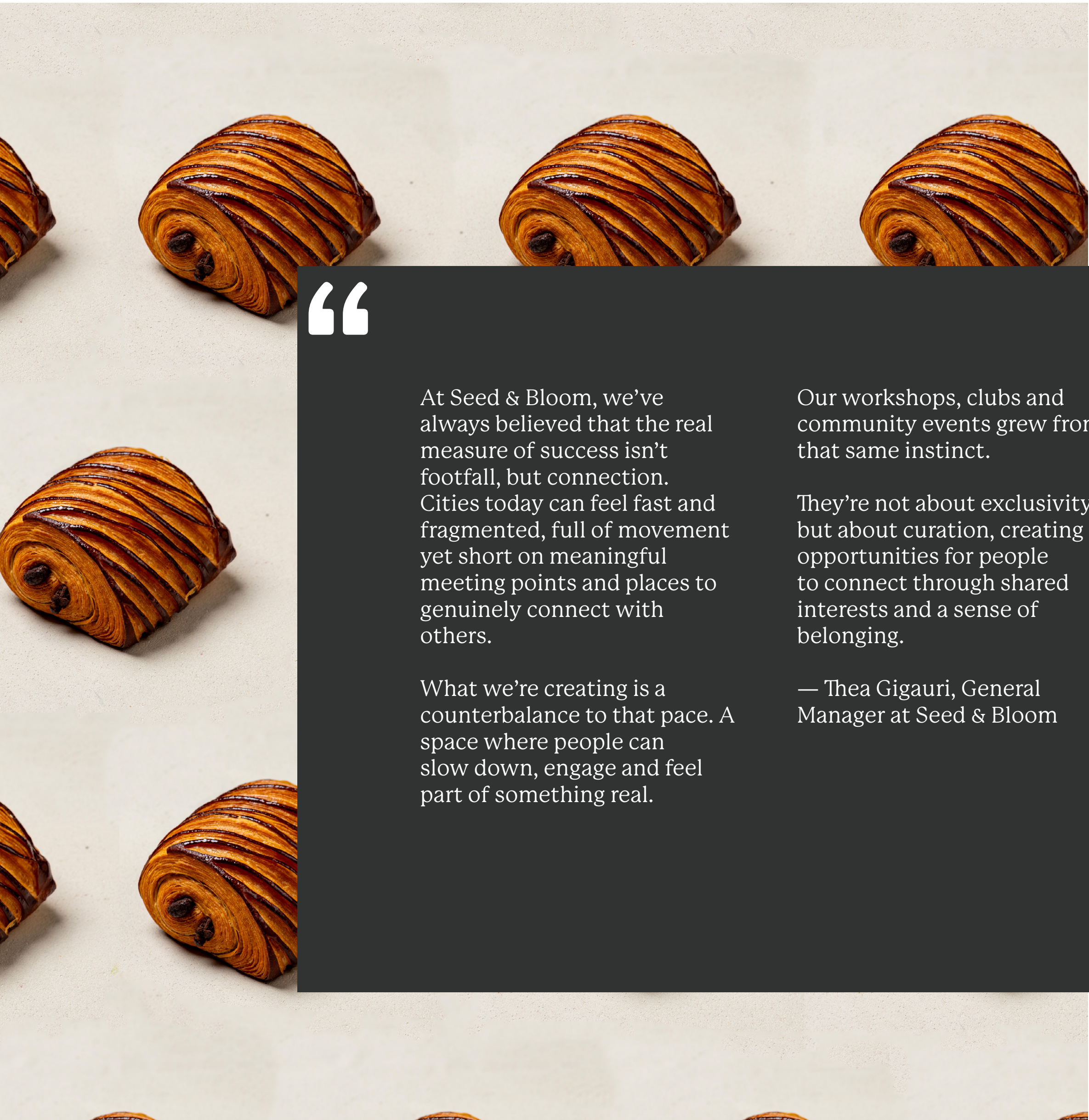
●●

Hybrid Member Models

Flexible tiers and digital memberships let people engage casually or deeply, depending on life stage or location.



Industry Inspiration



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At Seed & Bloom, we’ve always believed that the real measure of success isn’t footfall, but connection. Cities today can feel fast and fragmented, full of movement yet short on meaningful meeting points and places to genuinely connect with others.

What we’re creating is a counterbalance to that pace. A space where people can slow down, engage and feel part of something real.

Our workshops, clubs and community events grew from that same instinct.

They’re not about exclusivity, but about curation, creating opportunities for people to connect through shared interests and a sense of belonging.

— Thea Gigauri, General Manager at Seed & Bloom



Food For Thought

If every brand talks about community, how can guests tell who really means it?



The Sustainability Challenge

Macro Trend

Sustainability has become part of everyday language in hospitality and F&B. However, making things actually work in practice is still challenging.

For many operators, it's no longer about whether to act but how. Most now accept sustainability as a core principle, yet translating that commitment into measurable outcomes remains difficult.

Rising costs, fragile supply chains and complicated certification systems mean that progress is often fragmented and slower than expected.

There is widespread interest in carbon accounting and life-cycle analysis, but approaches are inconsistent and supply-chain visibility is often incomplete.

Although 84% of developers now view sustainability as essential to long-term asset value, few have found ways to scale their efforts without adding operational complexity (15).

At the same time, a clear trust gap persists among consumers with 57% of global travellers seek sustainable accommodation but fewer than half believing brands deliver on their promises (16).



For many operators, it's no longer about whether to act, but how.

For smaller or independent operators, the gap between principle and practice is often wider, not through lack of intent, but due to knowledge gaps, limited access to the right tools, infrastructure or funding. Many businesses are forced to take a more pragmatic approach, focusing on what can be verified and maintained over time.

Design teams face similar realities. Sustainable design today is less about bold gestures and more about longevity, adaptability and lifecycle thinking. Even where progress is visible, in modular construction, reclaimed materials or low-carbon systems, each decision involves trade-offs in time, budget or performance.

As one of the few areas where meaningful progress can be made, sustainability is increasingly being defined beyond environmental impact alone. It now extends to social, cultural and human wellbeing, linking guest experience with staff welfare, local sourcing and community engagement.

Sustainability is now defined beyond environmental impact, extending into social, cultural and human wellbeing, with the human element of hospitality reflected in operators prioritising fair employment, supportive workplaces and community engagement as tangible ways to strengthen teams, enhance guest experience and contribute to social sustainability.

While this broader lens can distract from environmental elements, it also creates more tangible opportunities to generate value and impact for smaller operators.

Many businesses are forced to take a more pragmatic approach, focusing on what can be verified and maintained over time.

In parallel with the growing events sector, we have also seen expectations around sustainable catering expand, with food at major events increasingly viewed as a visible expression of environmental responsibility, community values and brand alignment, yet many operators struggle to balance these ambitions with logistical realities, cost pressures and what can be consistently delivered at scale.

Overall, balance between ambition and delivery continues to shape the sustainability conversation. The next phase will rely on greater collaboration across hospitality and F&B to share knowledge, align standards and integrate responsible practices from design through to daily operations.

Sustainability remains the industry's most important responsibility and its greatest challenge, yet commercial pressures mean it often sits behind cost and revenue priorities.

Operational excellence in 2026 means designing systems that are flexible enough for theatre, disciplined enough for efficiency, and measurable enough for accountability.

- Ryan Waddell, Head of Operations at TGP International

84%

Developers view sustainability as key to asset value but struggle to scale efficiently

JLL, Global Real Estate Sustainability Outlook 2025, 2025

57%

Travellers seek sustainable stays but less than half trust brand claims

Deloitte, Sustainable Consumer 2025 Report, 2025

60%

High-end travellers prioritise hotels with plant-based dining options

Accio, Hotel Food & Beverage Trends 2025, 2025

45%

Middle Eastern consumers would pay more for food that improves soil and biodiversity.

PwC Middle East, Voice of the Consumer 2025: Middle East Findings, 2025

More Insights & Trends →



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Key Sub-Trends

● Emerging Signal ●● Gaining Ground ●●● Established

●

Closed Loop Kitchens

Kitchens designed as micro-ecosystems — water recapture, compost integration and reuse of offcuts as energy or inputs.

●●

Sustainable Social Dining

Experiences built around climate awareness, such as carbon-neutral supper clubs or “conscious cooking” events.



●●

Regenerative Dining

Dining integrated with hyper-local sourcing, zero waste artistry and visible circularity.

●

Smart Supply Mapping

Operators use blockchain and AI to track provenance, freshness, and carbon impact in real time.

●●

Human-Led Hospitality

Operators focus on staff welfare and inclusive employment to strengthen teams and elevate guest experience.

●●

Localism 2.0

Supply networks that favour ultra-local sourcing and seasonal micro-distributors



●●

Embedded Sustainability Tracking

Digital POS and audit tools integrating carbon, waste and energy metrics in real time.

●

Carbon-Labeled Menus

Dishes include visible carbon footprint scores, helping guests make informed and conscious dining choices.

●●●

Sustainable Design

Designers prioritise low-impact materials, energy-efficient systems and adaptable interiors that reduce waste and extend asset lifespan.

●

Measurable Impact

Operators standardise carbon and waste metrics, reporting sustainability data as part of brand transparency.

●●

Regenerative Hospitality

Beyond “do no harm,” venues contribute positively to ecosystems and communities — restoring land, culture, and connection through food.

●

Wellbeing Tracking

Success is measured not just by revenue but by staff retention, guest happiness and local benefit.

●●

Resource Light Design

Modular, repairable interiors that prioritise adaptability and lifecycle efficiency over decorative overhaul.

Methodology & Sources

This report is shaped by input from across all our teams with special thanks to the contributors below for their valuable insights.

Key Contributors

Founder & Chairman
Simon Wright

Partner & Head of Advisory & Design
Nichola Beskine-Taylor

Partner & Head of Marketing
Cheryl Sheppard

Partner & Head of Business Development
Daniel Morgan

Head of Operations
Ryan Waddell

Design Director
Claire Richmond

Creative Director
Gabriel Murray

Brand Development Director
Madeline McLeary

Strategy & Master Planning Director
Sean Paul

Marketing & Communications Director
Jim Kersey

Culinary Director
Ivan Sabol

Restaurateur & Co-Founder of Long Lane
Loui Blake

Co-Founder & Chief Executive of NLA
Nick McKeogh

*Executive Creative Director of Entertainment
and Experiences at Expo City Dubai*
Amna Abulhoul

Executive Chef of El Ta’Koy
Luis Pous

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What's Next?

Now you've got the trends,
let us help you figure out
what to do next!

As a global 360° hospitality agency, we team up with passionate brands, clients and entrepreneurs to make their long-term vision a reality.

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TGP INTERNATIONAL



Info@tgpinternational.com



tgpinternational.com



@tgpinternational



TGP International

