

The Role of F&B & Hospitality

In Placemaking &
Urban Development



TGP INTERNATIONAL



This report draws on insights shared during a series of roundtable discussions hosted by TGP International in collaboration with NLA, bringing together professionals from across the built environment, hospitality and placemaking sectors.

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The Context

Hospitality & the Changing Urban Landscape

Within the built environment, F&B is an increasingly central driver of performance and demand. In retail and mixed-use environments, this is reflected in both occupier demand and spatial allocation. F&B now represents a significant share of leasing requirements and can account for up to 30 percent of total space in many developments, signaling a move toward environments designed around experience, where dining plays a central role in attracting visitors and sustaining footfall.

Food has also become a key factor in how destinations are chosen and experienced, with the majority of visitors actively seeking out dining experiences as part of their journey. As a result, F&B is not only supporting retail but helping define the overall appeal and competitiveness of urban districts. Within the hotel

sector, the role of food and beverage assets is equally significant. In many full-service and luxury properties, restaurants and bars contribute a substantial proportion of total revenue, while also acting as the primary interface between the hotel and its surrounding environment. Well-positioned dining concepts attract both guests and local audiences, strengthening commercial performance and integration with the wider city.

At a broader level, the scale of the hospitality sector reinforces its importance within urban economies. From employment to GDP contribution, F&B sits within a wider ecosystem that underpins tourism, supports local businesses and drives activity across cities.

7+

Years F&B has led London retail demand, representing the largest share of occupier requirements in central London.

Colliers International. London Retail and Leisure Demand Analysis, 2024–2025.

Top 3

Food experiences consistently rank among the top three reasons for visiting a destination.

United Nations World Tourism Organization (UNWTO). Global Report on Gastronomy Tourism.

30%

Of leasable space in many retail and mixed-use developments is allocated to F&B.

JLL. Foodservice in Retail and Mixed-Use Developments, Global Research Report.

+32%

Rent premium for properties located within mixed-used lifestyle districts.

JLL. Experience Matters: Global Consumer Experience Survey, 2025

80%

Of travellers research food and drink experiences before arrival.

World Food Travel Association. Food Travel Monitor Report.

61%

Of developers are redesigning real estate strategies around flexible environments that integrate work, leisure, hospitality and community.

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



The Emerging RD&E Mix

Retail, Dining and Experiences

Many contemporary developments are increasingly structured around an integrated RD&E mix—Retail, Dining and Experiences. Rather than treating hospitality as a supporting element, developers are combining retail, restaurants and experience-led venues to create more dynamic destinations.

Within this evolving mix, food and beverage is becoming an increasingly prominent component, reflecting the growing role of dining environments in attracting visitors, extending dwell time and shaping the identity of urban districts.

EXPERIENCES

Events • Culture • Leisure • Entertainment
Immersive Venues • Competitive Socialising

RDE

RETAIL

Shops • Lifestyle Brands
Fashion • Local Retail

DINING

Restaurants • Cafés
Food Halls • Bars



Roundtable 1

The Rise of Food Hubs and What it Signals for the Future of Cities and Urban Life

Across cities worldwide, food hubs have become increasingly prominent elements of the urban landscape. From traditional market halls and food markets to contemporary food halls and clusters of independent restaurants, these environments bring together diverse dining experiences within a single destination.

London provides a strong example of how food-led environments can shape urban districts across new, heritage and regeneration-focused developments. For instance, Battersea Power Station has emerged as one of the city's most prominent mixed-use destinations since opening in 2022, combining retail, hospitality, leisure and residential uses within a single development.

It has welcomed over 26 million visitors and now includes more than 150 shops, restaurants, bars and leisure venues. And within this mix, food and beverage plays a central role in driving footfall and extending activity

throughout the day and evening, helping position the development as a broader lifestyle destination. There are countless other examples of this throughout the city as well as some of the most iconic and established examples of the retail-integrated food hall format.

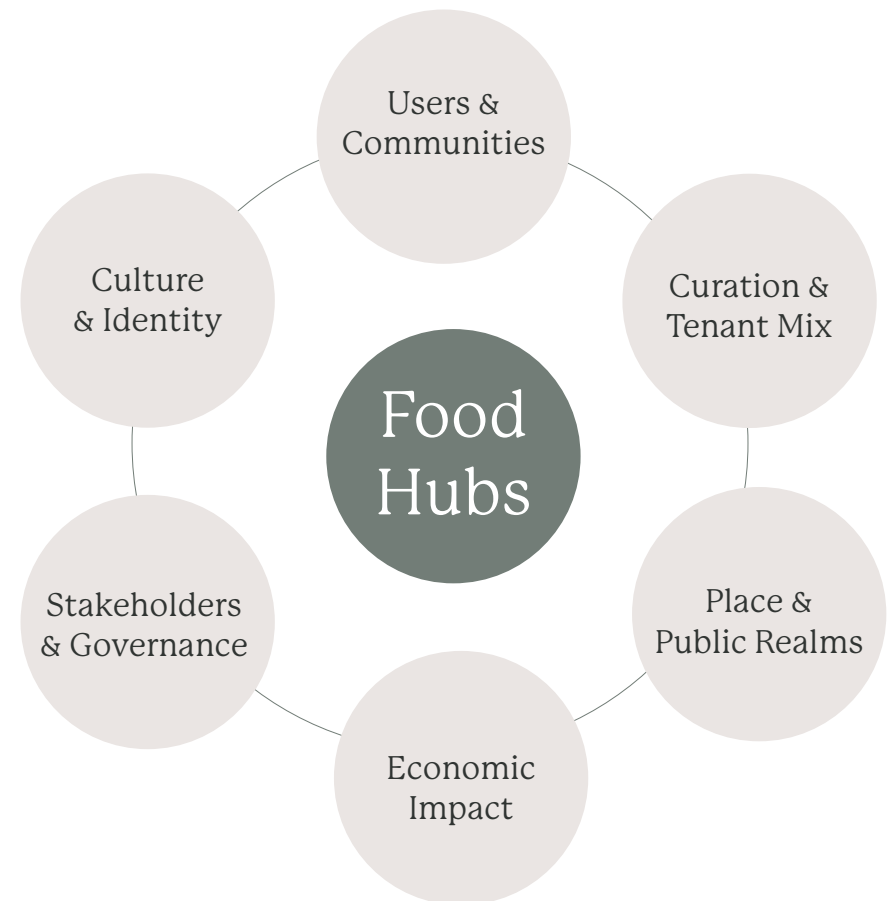
The Harrods Food Hall remains one of the most internationally recognised food retail destinations, combining dining, specialty retail and takeaway concepts within a curated environment that attracts both local and international audiences.

“ In hospitality-led developments, food and beverage is often the public face of the hotel, shaping how people arrive, linger and emotionally connect with a place.”

Zaynib Khan
Project Director
Benoy

Globally, the food hall market was estimated to be worth approximately \$13.5 billion in 2024, with projections suggesting it could exceed \$30 billion by the early 2030s. This growth sits alongside the rapid expansion of adjacent categories such as competitive socialising and immersive leisure, which combine

food, drink and shared experiences. In the UK alone, around 800 competitive socialising venues operate nationwide, reflecting the growing demand for experience-led destinations that combine dining with entertainment and social interaction.



For developers and city planners, these environments offer clear advantages. Clusters of complementary dining concepts create destination appeal, increase dwell time and encourage repeat visitation. When integrated effectively into the public realm, they can activate streets, plazas and underused spaces, contributing to the wider performance of urban districts.

In many emerging areas, food-led environments are increasingly used as early catalysts for development. Dining destinations can generate activity before other elements are fully established, helping build awareness and momentum around new neighbourhoods. Curated dining experiences often attract early adopters, creating the initial footfall that supports wider retail, cultural and community activity.

41%

Of visitors to competitive socialising venues report visiting at least once a month.

KAM Media, The Competitive Socialising Report 2025

In some developments, landlords are exploring concession-style formats and shared infrastructure to reduce capital requirements for operators. By providing fitted kitchens or flexible vendor spaces, these approaches can lower barriers to entry while allowing tenant mixes to adapt as districts grow and change. Their success, however, depends on careful curation, location and a clearly defined operational model, supported by an overarching F&B strategy.

“London is full of incredible food hubs, strong examples of how well-planned destinations can spark growth and bring people together.

While food hubs can drive footfall and repeat visits, their long-term success depends on how thoughtfully they are integrated into the communities they serve. The most compelling destinations are those with a strong sense of place, where experiences feel authentic and welcoming.

Food has always been a powerful way to unite people. When approached carefully, these spaces can do more than feed visitors. They can strengthen local identity, support job creation and create thriving places for communities to gather.”

Kathleen Allen
Strategy Director – Retail Experience Design
Gensler



Roundtable Takeaways

- **Flexibility is essential** - Food hubs require adaptable planning, with tenant mixes and concepts able to evolve as neighbourhoods develop and consumer behaviour shifts.
- **Local identity strengthens destination appeal** - Successful food hubs reflect their surroundings, with independent operators, diverse cuisines and accessible pricing helping create a strong sense of place.
- **Curated tenant mix drives repeat visitation** - A balanced mix of everyday and destination concepts encourages regular return while maintaining a clear and coherent identity.
- **F&B acts as a catalyst for wider activity** - Dining environments often generate the initial footfall that supports surrounding retail and commercial uses.
- **Integration with the wider neighbourhood is critical** - Well-integrated schemes strengthen local high streets and businesses, while poorly planned hubs risk competing with existing centres.
- **Collaboration between stakeholders improves outcomes** - Alignment between developers, planners, operators and local authorities is key to delivering commercially and socially successful environments.

Industry Inspiration

Coal Drops Yard

The transformation of King's Cross illustrates how food and beverage can play a central role in shaping a mixed-use district.

The wider estate spans approximately 67 acres, combining offices, residential buildings, cultural institutions and public space. Hospitality forms a key layer of the activation strategy, helping animate streets and public spaces throughout the day and evening.

Across the development, more than 50 restaurants, cafés and bars create one of London's most diverse dining

destinations. Within Coal Drops Yard, food and beverage accounts for a significant share of the tenant mix alongside fashion, lifestyle and cultural brands.

This concentration of dining plays a central role in attracting visitors and supporting footfall across the wider development. Restaurants and cafés activate key pedestrian routes and public spaces, helping create a district that remains active beyond traditional working hours.



FOOD FOR THOUGHT

How can pricing, accessibility and tenant mix help ensure dining environments reflect the diversity of surrounding communities?



Roundtable 2

Social Dining, Social Impact F&B as a Driver of ESG and Inclusive Communities

Where people choose to spend time during the day often comes down to the availability of accessible, informal spaces. Restaurants, cafés and dining environments increasingly fulfil this role, functioning as social infrastructure within a city.

Unlike many other sectors within the built environment, hospitality operates at a highly visible and human scale. Dining environments shape how people move through districts, whether ground floors remain active beyond working hours and how well communities feel represented. As a result, F&B often becomes one of the most public expressions of a development's broader social and environmental ambitions.

This role is particularly relevant within large-scale developments and regeneration projects. Thoughtfully planned hospitality environments can create inclusive gathering spaces that attract both residents and visitors, helping establish neighbourhood hubs that operate throughout the day and into the evening.

Food and beverage also plays an important role in supporting local economies and employment. The sector remains one of the most accessible entry points into the workforce, while also providing pathways for entrepreneurship and career progression.

Restaurants and food businesses can act as platforms for independent operators, contributing to the cultural diversity of urban districts. In many cities, partnerships between operators, education providers and training programmes are helping build long-term workforce capability.

“ Real change happens when you get the balance right — between commercial needs, experience and community.”

Simon Glynn
Head of Place Shaping
Heart of London Business
Alliance (HOLBA)

Environmental

- Energy-efficient commercial kitchen design
- Ventilation and workflow planning that reduces load and improves efficiency
- Electrification strategies aligned with local grid capacity
- Low-impact material selection and circular fit-out considerations
- Menu engineering and procurement frameworks aligned with seasonal and regional supply
- Structured food waste measurement integrated into operational KPIs

Social

- Curated tenant mix balancing independents and established brands
- Price architecture that supports multiple customer segments
- Inclusive interior design standards and accessible layouts
- Flexible spaces that accommodate community programming
- Workforce development frameworks and apprenticeship pathways
- Leasing models that lower barriers for emerging operators

Governance

- Defined ESG KPIs such as waste per transaction and staff retention rates
- Transparent reporting structures Clear operator performance criteria within management agreements
- Asset-level oversight linking ESG performance to commercial outcomes
- Ongoing review of supplier standards and procurement compliance

For developers and planners, these dynamics present an opportunity to embed social value more deliberately into hospitality strategies. Curated tenant mixes, flexible leasing structures and spaces designed for community programming can help ensure these environments reflect local identity while remaining commercially viable

At the same time, the operational scale of hospitality brings environmental and governance considerations into focus. From sourcing and supply chains to waste management and kitchen efficiency, F&B operations have measurable impacts on resource use and emissions.

When considered from the earliest stages of development, these factors can support broader ESG objectives while strengthening the resilience of urban districts.

“ Food and beverage holds an important seat at the table when we think about how places evolve. These are the spaces where people gather, interact and build community, making them an essential part of the social infrastructure of our cities.

Hospitality also plays a powerful role in creating opportunity. In an economic climate where starting a business can feel out of reach, the sector continues to offer pathways for entrepreneurship, career mobility and local economic growth. The more we embed this thinking into planning and development, the greater the opportunity to create places that support both communities and long-term economic vitality.”

Fiona Gibson
Senior Account Manager
NLA



Roundtable Takeaways

- **Social value contributes to commercial performance** - Developments that prioritise community engagement and inclusive dining environments often achieve stronger long-term economic outcomes as they become embedded within local neighbourhoods.
- **Hospitality creates pathways for entrepreneurship** - Restaurants and food businesses provide opportunities for start-ups, independent operators and emerging talent
- **Accessibility is critical to inclusive placemaking** - Successful dining environments consider accessibility across pricing, physical access and cultural relevance.
- **Flexible leasing and support structures encourage innovation** - Shorter leases, incubator kitchens and fit-out support can help emerging operators enter the market and contribute to more diverse food ecosystems.
- **Programming and events strengthen community engagement** - Markets, festivals and cultural programming activate hospitality environments and strengthen connections with local communities.
- **Operational strategy influences ESG outcomes** - Decisions around sourcing, waste management, workforce development and supply chains shape the environmental and social impact of hospitality environments.

50%

Of total hotel revenue attributed to F&B in many full service and luxury hotels

Horwath HTL hotel benchmarking research

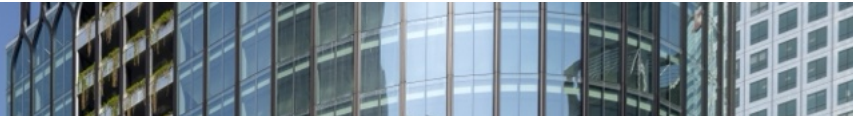
40%

Higher customer lifetime value for brands that foster community and belonging

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

Industry Inspiration

Canary Wharf



Canary Wharf illustrates how hospitality environments can help transform a primarily commercial district into a more balanced urban neighbourhood.

Originally developed as a financial centre, the estate has evolved into a mixed-use district combining offices, residential, retail, public space and cultural programming, with food and beverage playing a key role in this transition.

Today, Canary Wharf hosts more than 80 restaurants, cafés and bars, alongside

markets and casual dining venues that activate the district throughout the day and evening. Developments such as Market Halls Canary Wharf create shared dining environments that attract residents, workers and visitors.

By expanding its hospitality offering, the district has extended activity beyond traditional office hours, supporting a more diverse, resilient and socially active neighbourhood.



FOOD FOR THOUGHT

What commercial models could help lower barriers for emerging operators while maintaining strong curation and quality?



Roundtable 3

Destination Dining as a Real Estate Strategy

Across many contemporary developments, food and beverage is increasingly being used as a strategic tool to shape the identity and commercial success of places. Well-curated dining environments can transform buildings and districts into destinations, attracting visitors while strengthening the long-term positioning of an asset.

In mixed-use developments, restaurants and hospitality venues are often among the most visible and frequently used elements. Ground-floor dining creates street-level activity, helping buildings feel welcoming while shaping first impressions and overall character.

As a result, food and beverage is increasingly positioned as a strategic tool within development. Well-curated dining environments contribute directly to how assets perform, supporting footfall, dwell time and the long-term positioning of a building or district.

Developers and asset owners are therefore taking a more hospitality-led approach. Rather than allocating space for F&B once core elements are fixed, it is being considered from the early stages of masterplanning, helping define how people move through a development and how different uses connect.

The focus is not only on provision, but on creating environments that people actively choose to visit.

“ We have to build for the long term — designing spaces that can live on beyond the first brand and continue to evolve over time.”

Ian Rae
Corporate Director —
Regeneration, Planning &
Strategic Property
London Borough of Waltham
Forest



Given visitors increasingly seek destinations that combine dining, culture and social experiences within a single location, developments are shifting toward more integrated, experience-led environments.

Destination dining responds by offering distinctive concepts and clearly defined identities that encourage repeat visitation and sustained engagement.

In many projects, restaurants also strengthen connections between developments and their surrounding communities, attracting both local audiences and visitors and supporting more balanced, active districts.

For investors and developers, these dynamics translate into measurable outcomes. Successful dining environments increase footfall, extend dwell time, enhance leasing appeal and

strengthen brand perception, contributing to long-term asset performance.

This requires a more considered approach to planning, where F&B is assessed not only by unit mix or operator profile, but by how it supports movement, atmosphere, audience behaviour and the wider destination experience. When integrated effectively, hospitality becomes part of the development's strategic infrastructure, shaping how people use the space, how long they stay and how strongly they identify with it over time.

“ You have to make people fall in love with the idea first. Create the dream, then show them how it can work.”

Simon Winters
Project Leader
Heatherwick Studio

“ When thoughtfully curated and embedded early, dining environments are much more than an amenity. They shape identity, drive sustained footfall, and create the everyday experiences that turn destinations into communities.”

Puja Dowlani
Retail Associate Director
The Portman Estate

69%

Of consumers globally say they are willing to pay more for high-quality experiences

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



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Roundtable Takeaways

- **F&B is the public face of a development** - Restaurants and cafés are often the first point of interaction with a building or district, shaping perception and initial engagement.
- **Ground-floor hospitality defines the experience of a place** - Well-designed dining environments create street-level activity and encourage movement through public spaces.
- **Destination dining strengthens brand identity** - Distinctive restaurant concepts enhance visibility and help developments stand out in competitive urban markets.
- **Hospitality drives footfall and dwell time** - Curated dining environments attract visitors and extend time spent on site, supporting surrounding retail, cultural and leisure uses.
- **Adaptability is essential for long-term success** - Buildings and hospitality spaces must accommodate evolving concepts as markets and audiences shift.
- **Collaboration between operators and developers is critical** - Successful projects rely on close alignment between developers, operators and designers to balance commercial performance with guest experience.

Industry Inspiration Marylebone

Marylebone is another example of how destination dining can shape the identity of an urban neighbourhood.

The district has developed a reputation as one of London's most distinctive dining areas, combining independent restaurants, cafés and speciality food retailers within a compact, walkable environment.

This concentration of hospitality creates a strong sense of place while

attracting both local residents and visitors. In recent years, the area has adapted to changing market conditions by introducing more accessible dining options alongside its established restaurants.

This balance helps maintain consistent footfall while broadening its appeal to a wider audience.



FOOD FOR THOUGHT

How early in the development process should F&B strategy be integrated into masterplanning decisions?



Collective Observations

Trends & Insights

The following trends reflect key themes identified through the roundtable discussions, highlighting how F&B is being integrated into development and regeneration projects.

<p>Hospitality as a Driver of Placemaking</p>	<p>Restaurants, cafés and food markets are increasingly used to activate places and create social energy. Well-curated dining environments influence how people move through neighbourhoods, how long they stay and how they connect with a place, positioning F&B as a strategic component of placemaking.</p>
<p>Food Hubs as Social and Cultural Anchors</p>	<p>Food halls, markets and clustered dining environments are emerging as key gathering spaces. By bringing together diverse cuisines, operators and programming, they attract residents and visitors while strengthening neighbourhood identity.</p>
<p>Experience-Led Destinations Replacing Transactional Retail</p>	<p>As expectations evolve, developments are shifting from transactional retail to experience-led environments. Dining, entertainment and social interaction are central, with F&B often acting as the anchor.</p>
<p>Hospitality as Social Infrastructure</p>	<p>Restaurants and cafés function as informal civic spaces where people meet and interact. In this way, F&B supports the social fabric of cities and provides accessible spaces for everyday gathering.</p>

<p>Destination Dining as a Real Estate Strategy</p>	<p>Distinctive restaurant concepts shape identity and visibility. F&B often acts as the public face of a development, attracting visitors and contributing to long-term brand equity.</p>
<p>The Rise of Adaptable and Multi-Use Spaces</p>	<p>Hospitality environments are designed to evolve throughout the day, from cafés and workspaces to restaurants and social venues, helping developments remain active across audiences and time periods.</p>
<p>Strengthening the Nighttime Economy</p>	<p>Dining and hospitality extend activity beyond traditional hours. Well-positioned F&B concepts support vibrant evening economies and help create districts that remain active later into the day.</p>
<p>Local Identity and Authenticity as Competitive Advantage</p>	<p>Consumers seek environments that feel distinctive and locally rooted. Independent operators and neighbourhood-focused concepts are key to successful hospitality strategies.</p>
<p>Collaboration Across Sectors</p>	<p>Successful hospitality environments rely on collaboration between developers, operators, planners and public authorities to align commercial goals with community needs.</p>
<p>F&B Influencing Tourism and Hotel Sector</p>	<p>F&B shapes how people experience cities, attracting both residents and visitors, while in the hotel sector well-developed F&B drives guest engagement, commercial performance and stronger integration with surrounding neighbourhoods.</p>

Top 5 Key Takeaways

01

Prioritise Early-stage F&B Strategy

The strongest outcomes come when hospitality is embedded within masterplanning, supported by clear curation and viable operational models.

02

Treat Food And Beverage as a Strategic Layer

Dining environments shape footfall, activate public space and define long-term identity rather than acting as a supporting amenity.

03

Design For Experience-led Demand

Successful developments integrate dining, culture and social interaction to create destinations people actively choose to visit.

04

Balance Commercial Performance With Social Value

Well-curated hospitality environments drive revenue while supporting community engagement, accessibility and local identity.

05

Align Stakeholders To Deliver Long-term Value

Collaboration between developers, operators, planners and designers is critical to creating resilient, high-performing environments.



The F&B Value Creation Loop



Final Reflections

The Strategic Role of F&B in the Future of Cities

With food and beverage now representing the largest share of retail demand in central London, its role within the built environment is increasingly central.

Food and beverage plays a key role in how places perform, are used and evolve. Its impact is both commercial and social. At a development level, it drives footfall, dwell time and leasing appeal, while at a city level it shapes identity, supports employment and provides shared spaces.

This is reflected in how F&B is integrated into development. From food hubs and destination dining to socially driven environments, it plays a structural role in activation, engagement and long-term relevance.

This places greater emphasis on planning and delivery. Early-stage strategy, clear curation and viable operational models are critical, particularly as operators navigate rising costs and evolving expectations.

For developers, planners and operators, the opportunity lies in a more integrated approach, where hospitality sits alongside retail, public realm and cultural programming to support performance and long-term value. As cities continue to evolve, food and beverage will remain central to how urban environments function, express identity and stay competitive.

“ Taking a holistic, area-wide approach to the ground floor experience—culture, leisure and F&B offerings—is vital to the creation of successful, vibrant places.

More than ever, we are keen to see more collaboration, adding value to investors, operators and districts—and encouragingly we are seeing a growing appetite from all stakeholders for a more joined up, curated approach.”

Kate Hart
Chief Executive Officer
Eastern City BID, Primera

“ At Earls Court, the interplay between F&B, the experiential economy, innovation and culture is integral to creating a destination.

What draws people to a place is the combination of all of these factors, curating this effectively is central to exceptional placemaking.”

Rebekah Paczek
Director of Public Affairs,
Social Impact & Community
Relations
The Earls Court Development
Company

“ London’s markets are rooted in local life, independent enterprise and everyday exchange. At their best, they give high streets a distinctive identity—bringing together diverse traders, food cultures, affordable essentials and specialist goods in ways that cannot be replicated online or through a generic retail mix. It is this breadth, character and adaptability that makes markets such powerful anchors for places people want to visit.”

Megan Dean
Senior Project Officer –
Regeneration
Greater London Authority

“ Food is one of the most powerful drivers of human connection and belonging. When embedded into urban and F&B masterplanning, it transforms from a transaction into civic infrastructure: shaping inclusive places that connect cultures and generations, strengthen local economies, and weave sustainability into everyday urban life.”

Michaela Winter-Taylor
Senior Associate, Cities &
Urban Design Lead
Gensler

“ Collaboration is everything — learning from each other, staying focused on the purpose and being clear about who the audience is.”

Sarah McLaren
Leasing Director – Hospitality
& Leisure
The Crown Estate

EXPLORE MORE
INSIGHTS &
RESEARCH





*We Create
We Innovate
We Activate*



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Sources & Perspectives

This report combines insights from roundtable discussions co-hosted by TGP International and NLA, drawing on perspectives from across the NLA membership. It is further informed by third-party data, industry benchmarks, NLA research and TGP International's global project experience.

Industry Sources

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Get in Touch

Reach out to learn how we work with our partners to support development, real estate and placemaking projects.

CONTACT US

As a global 360° hospitality agency, we bring bold ideas to life—creating world-class F&B brands, curating standout hospitality experiences and activating communities around the world.



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