

GLOBETRENDER™

The background image shows a luxurious interior with deep red walls. A central feature is a large, ornate archway containing a display case with a hanging lantern and books. The walls are decorated with intricate floral and geometric patterns in shades of teal, gold, and white. The overall atmosphere is elegant and sophisticated.

Independent Hotel Trends 2024 - 2026

Introduction

Welcome to Globetrender's *Independent Hotel Trends 2024* report, published in October 2023, and co-authored by Hannah Ralph.

In this forecast Globetrender has identified ten key trends that present revenue-generating opportunities for independent hotels entering the next phase of their journey. Whether a hotel has been handed down from generation-to-generation or is a disruptive new upstart, it is essential to understand the shifting expectations of today's global travellers and translate these into actionable strategies.

Among the trends we explore are Co-working Communities, Cultural Encounters, Low-Impact Operations, Experiential Retail and Micro Chains. We also look at how Joyful Design is bringing colour to interiors; why Locavore Sourcing is vital to sustainability; and how Personalised

Curation is key to repeat bookings. In an ever-evolving landscape of travel and hospitality, independent hotels have emerged as a dynamic force that is redefining the very essence of the guest experience. These boutique establishments, often family-owned or managed by passionate entrepreneurs, are breaking away from the cookie-cutter mould of chain hotels, offering travellers distinct, memorable stays with a strong sense of place.

In an era characterised by rapid technological advancements, shifting consumer preferences, and the revival of a more conscious and experiential approach to travel, forward-looking independent hotels are embracing change with open arms. They are not merely adapting to new paradigms but actively shaping them.

Designed as a compass for individual hoteliers, developers and other industry stakeholders, this report

provides practical insights into the trend leaders you need know about and what you can learn from them. With major brands expanding rapidly through new openings, acquisitions and mergers, it becomes harder and harder for independent hotels to gain cut-through in a crowded marketplace. However, word-of-mouth recommendations and the power of social media can go a long way in boosting hotel bookings, even without the might of a branded collection or chain behind them.

With corporate Goliaths unable to act fast or nimbly, independent hotels have the advantage when it comes to experimenting with ambitious sustainability initiatives, bringing new concepts into the world or building genuine relationships with guests in an age of mass tourism. Globetrender has produced this report as a thought-starter for independent hoteliers who are either planning to launch new

openings, rebrand, renovate or expand their footprint.

If you would like bespoke guidance on how to react to these trends, please do get in touch with Globetrender directly to book a consultation session. We'd be delighted to offer you a one-off one-hour video call for £250 using code "lifestyle" when you book. Just email jenny@globetrender.com.

For regular analysis of emerging travel trends, subscribe to our VOLT newsletter: globetrender.com/volt.



Jenny Southan
Editor, Founder, CEO
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**Independent hotel consultancy:
future-proof your business strategy**

Use code "lifestyle" to secure a £250 video call with Globetrender founder Jenny Southan.

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GLOBETRENDER™

"We believe the future is knowable"

GLOBETRENDER IS THE UK'S LEADING TRAVEL TREND FORECASTING AGENCY AND ONLINE MAGAZINE DEDICATED TO THE FUTURE OF TRAVEL.

Founded by Jenny Southan, Globetrender delivers cutting-edge insights into how people will be travelling in the 21st century, giving professionals the knowledge they need to future-proof their businesses.

Globetrender's trend reports are read by thousands of travel industry professionals, as well as executives from a wide-variety of multinational corporations looking for insights into the future of travel and consumer behaviour.

Globetrender also publishes two newsletters – free weekly innovation briefings and a premium product called VOLT, which explores emerging travel trends in depth on a weekly basis.

Consulting and trend-based strategy is central to Globetrender's offering. Jenny is also available to book for public speaking engagements including webinars, talks, live broadcasts, workshops, panels, conferences and conventions.

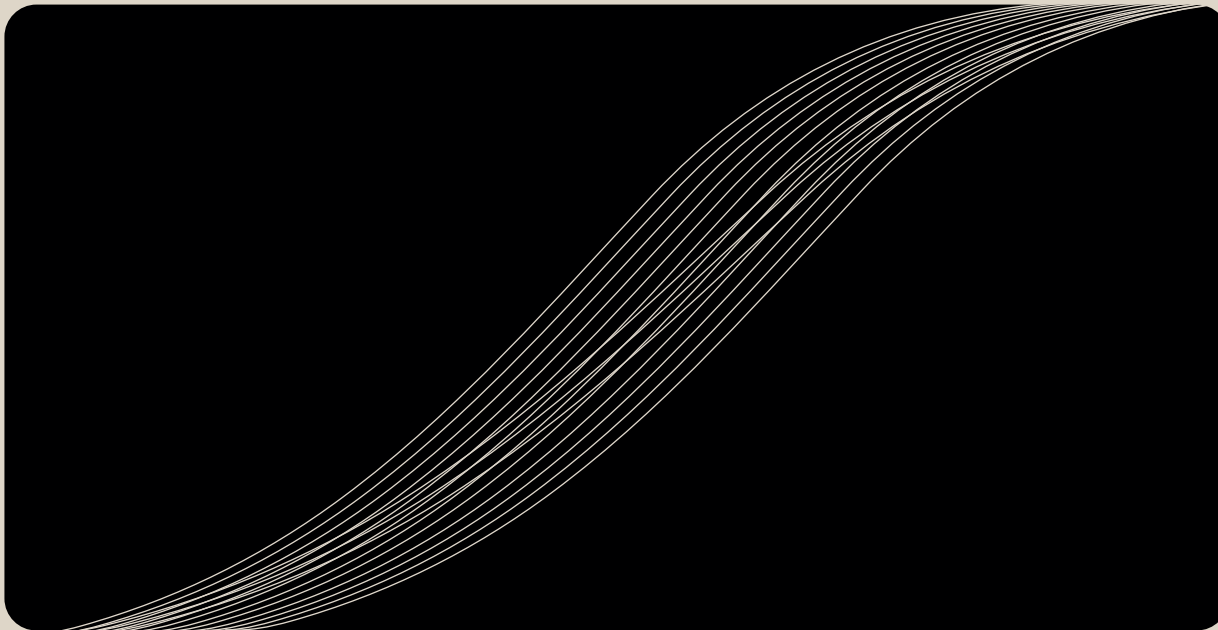


Jenny Southan
Editor, founder & CEO

Jenny has 15 years of experience working as an award-winning travel journalist, with ten years as features editor of *Business Traveller* magazine – a job that enabled her to travel the world. In addition to running Globetrender, she freelances for titles such as *Condé Nast Traveller*, *The Telegraph* and *Mr Porter*, and is a regular travel commentator for BBC Radio.

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ANALYSIS & TREND FORECASTING



EMAIL JENNY@GLOBETRENDER.COM FOR BESPOKE CONSULTING ON THE FUTURE OF TRAVEL

AT GLOBETRENDER, WE FOCUS ON QUALITATIVE RESEARCH UNDERPINNED BY QUANTITATIVE DATA.

We always consider how the life cycle of a trend moves from the innovators that trigger them on the minority fringes to the early adopters, early majority, late majority and, finally, the laggards.

When searching for trends, we apply the “three times” rule. A one-time occurrence is an anomaly, twice is a coincidence and three times is a trend, worthy of further exploration.

The identification and naming of trends is based on IOI: Intuition, Observation and Investigation. This is both a creative and academic process.

For every “micro” trend, we also consider the “macro” trends that represent the wider cultural shifts in consumer desires, motivations, values and behaviours around the world. These are based on STEEP – Social, Technological, Economic, Environmental and Political – forces.

Innovation is at the root of every trend, so we are always looking at what is new and disruptive. Just like news reporters, we ask the questions “who”, “what”, “where”, “why” and “when?” – but like investigative journalists, we then dive much deeper.

By discovering multiple examples of a trend, conducting desk and field-based research, interviewing insiders and producing case studies, “qualitative” proof of it is generated.

At Globetrender, we rely on our unique access to travel industry experts and ongoing consumer observation to remain ahead of the curve.

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Co-working Communities

Tapping into the rise in digital nomadism, independent hotels are investing in inviting day-use communal spaces for remote workers

Co-working Communities

Although many major companies are demanding a full return to the office from 2024, we are now living in the age of the entrepreneur, which means it's not uncommon to meet people working on side hustles or at the very least dreaming of starting their own business, if they haven't already left their full-time job to branch out on their own.

In the UK, there are now 4.3 million self-employed people – that's 64,000 more than in summer 2022. For many people, remote working – at least part time – is now the optimum way of operating. A recent study by self-employment specialist MBO Partners revealed that 72 million US citizens are planning to become digital nomads over the next two to three years. This means there is a huge opportunity for independent hotels to create Co-working Communities for both locals and travellers, where they combine productivity with downtime.

As life and work becomes increasingly blended, creating inviting spaces within hotels for people to get their laptops out is a great way of enticing a younger demographic of travelling professionals. One of the easiest co-working implementations is day-use communal spaces – you'll notice 100 Shoreditch



cleverly held on to the long, lobby-based co-working table from its Ace predecessor in London's East End.

The Hoxton group lobbies have long-held a gravitational pull for nomadic workers: "the unofficial workspace-of-choice for laptop warriors since 2006," says the brand. Locke Hotels, CitizenM, Mama Shelter (and more) have all made revenue-generators out of their lobbies thanks, namely, to high-margin coffee sales.

Ruby Workspaces now operate at five of the Ruby brand's 16 European hotels. They offer a private office, dedicated desk or "flex desk" option via day passes and longer-term subscriptions. Perks include bottomless barista coffee, bookable meeting rooms, a 15% discount on stays and a

printing allowance. It's a similar model at Working From_ by the Hoxton, which has the addition of a "Side Hustler" membership – providing evening and weekend access to its co-working spaces.



While Ruby's CEO Michael Struck has called its workspaces a "complementary element" to overnight stays, many indie hotels are pivoting to making remote work the focal point.

Trendy lifestyle chain Selina says it's "custom-built for today's nomadic traveller", providing guests with a "global infrastructure to travel and work abroad seamlessly". The global brand announced co-working spaces in both its Camden and Brighton outposts this summer. Then there is the Social Hub co-working hotel chain, which has 16 properties in Europe and further openings coming up in San Sebastian, Glasgow, Rome, Florence, Porto and Lisbon.

But it's not enough to merely offer the apparatus – a few thematic additions tend to follow. The UK's Birch, with its artistically-inclined members' club model for locals, demonstrates three of the most common in that it a) brands itself as a "community", b) promotes an on-site rotation of social and cultural events, and c) leads a gentle wellness programme. The opening of a second property earlier this year is enough indication that the model worked the first time around.

The future of the trend may manifest in independent hotels offering longer stays. The success of aparthotels can be seen in ever-expanding brands such as Roost, an "extended-stay concept hotel" group with five properties in the US, and Zoku, "a new kind of business hotel", which designed its European lofts as home-office hybrids – the kitchen table providing the focal point. Eaton Workshops (currently in Hong Kong and Washington DC) follows in the jet stream of Soho House with its "House" brand for remote creatives who want to make a cultural impact. Then there is Stamba, a Design Hotel in Tbilisi, which has "D Block" – two floors of workspace that's going as far as to call itself an "incubator" for start-ups.

Personalised Curation

Independent hotels often have the advantage of a smaller pool of guests, and staff who can pre-emptively tailor in-room amenities to travellers' needs and desires



Personalised Curation

Although independent hotels don't have access to customer data via giant loyalty schemes or AI profiling, they do have the advantage of a small pool of guests staying at any one time, and staff who can, if briefed, begin to tailor the hotel experience to any one guest's particular needs or preferences. This is Personalised Curation, and soon it may be an expectation rather than a nicety.

Research by Accenture proves that 91% of people are more likely to choose “brands who recognise, remember, and provide them with relevant offers and recommendations”. This extends to the hotel experience in myriad ways, and can start as

early as asking your customer to tailor their email preferences – do they want to hear about events, or offers, or both? And don't underestimate the power of a check-in email – no longer merely an administrative necessity but a chance to learn something about your guest ahead of arrival. Preferred check-in and check-out times are a brilliant place to start, as are allergies. Is your guest vegan? Well, you might want to adapt your minibar offering, or have a vegan menu on hand.

An exclusive-hire country house hotel in Leicester, Keythorpe Hall personalises every stay. As owner Barbara van Teeffelen tells Globetrender: “The menu is created following a conversation



with our head chef Bent Varming. Guests then have a conversation with Bert Blaize, our wine concierge, about the drinks they like, the occasion and their budget. Once the guests are happy with this we buy the wine in especially for their stay.” It's the same principle for the itinerary. The estate can whip up almost anything a guest may desire – from falconry to butchery, flower arranging to bespoke gin making.

Around the world, hotels are increasing their personalisation efforts to positive effect – enhanced brand preference, increased loyalty and retention, plus increased sales. Hotel Le Coucou, Meribel, has seen all three from simply giving guests

a choice of pillow (feather, down, soft, firm) and duvets to suit their personal preferences; in winter, they'll even monogram your skis. “A textbook greeting will no longer do, especially within the luxury five-star market,” says the Hari hotel in London's general manager Andrew Coney. “Prior to a guest's arrival we do some research into them, whether on social media or a company website, for example.” This is all public information – Coney's keen to note. “We then create an experience around their interests, hobbies and passions or perhaps why they've come to London. This could be in the form of an in-room amenity; we've found out that one of the children in the family is a

big Harry Potter fan and have placed a wand in the room with a list of spells that each member of the team knows how to act out.”

Following its refurb reveal earlier this year, Santa Monica's Georgian hotel now requests personal preferences from guests prior to arrival in order to funnel that data into one Bar Splendido – a floor-to-ceiling minibar in all 23 rooms with buttons for champagne (a vintage cart will pull up to your suite), Book Club (a trolley of carefully selected books) and the Usual – which delivers the guest's personal favourites, as outlined before arrival – anything from an exacting martini to a specific magazine or newspaper.





Cultural Encounters

Beyond the confines of the property, guests are looking to leverage the knowledge and expertise of hoteliers to gain access to unique and memorable experiences in the vicinity

Cultural Encounters



“Travellers want authentic experiences that give them a taste of local culture and let them explore hidden gems that friends back home don’t know about – and they want the money they spend on vacation to support the local community,” so summarised the 2023 *Global Travel Trends Report* from American Express Travel.

According to a recent study by GetYourGuide, 95% of travellers prefer to spend at least part of their trip on new and unique experiences. Its head of brand US, Caroline Berger, remarked: “Today’s leisure travellers are seeking one-of-a-kind experiences that highlight destinations through an authentic lens.” Souvenirs are no longer fridge magnets, but intimate workshops, behind-the-scenes tours and memorable moments with local guides.

Some hotels are, in this way, brilliantly conflating culture and community – take the Anopura, an hour’s drive north-east of Jaipur. In 2024, a roster of new offerings will include pottery workshops and classes in the ancient art of block printing, as run by local women from the neighbouring village. Indigenous tourism experiences act in a similar vein – promoting immersive, often

mind-expanding experiences for the tourist, and revenue for the provider. In the case of Indigenous tourism across the likes of British Columbia, Canada and Western Australia, the money generated from tourism can be funnelled directly back into legal battles that First Nations groups are experiencing to reclaim their lands.

Hotels are uniquely placed to make a hero of their destination and so helping guests forge memories with cultural buy-in could be the difference between a one-time visitor and loyal fan. A lot of it comes down to what the front desk will do for you, and what you encourage guests to get out of the service. At La Gemma, Florence, the front desk will organise private visits to local perfumeries or ateliers, arrange farmhouse cooking classes, and even a helicopter ride over the city, should you only ask.

The Chatwal Lodge in Upstate New York, meanwhile, has teamed up with local experts to offer a stargazing adventure with the president of the Catskills Astronomy Club, a two-hour twitcher tour by the local Sullivan County birdwatching society, and even VIP access to the site of the 1969 Woodstock festival – the Pavilion outdoor concert hall at Bethel Woods.

Gastronomy is a huge area of cultural interest, and hotels with foodie heritage can easily capitalise. The Udon House, in Japan’s Kagawa Prefecture, puts on udon noodle workshops run by Japanese masters to both keep the art of udon alive for future generations, and bring tourism to this smaller prefecture. The Shoals, a new “boatel” in Long Island, has an on-site oyster business and gives guests the chance to see the operation in action, learning how the floating nursery and hatchery works, and how to shuck oysters. They’ll finish the experience with a tasting by the Shoals’ own food truck.

A luxury brand excelling in Cultural Encounters is Rocco Forte. At the Balmoral hotel, guests can try their hand at tartan design, or scent making with a resident “Scent Butler” from Kingdom Scotland – Scotland’s first fragrance house. Recently, private “urban art” tours have been added to the list at its Munich and Berlin outposts. It has perfected, too, the art of the takeaway: at Rocco Forte’s Masseria Torre Maizza in Puglia, guests can meet fashion designers from the house of Rossorame in their own atelier, as well as craft a leather bag to take home. Come check-out, guests will have become cultural custodians in their own right.



Low-impact Operations

Independent hotels have the advantage of testing out and implementing new sustainability systems that big brands would not have the agility to execute

Low-impact Operations



If there's one non-negotiable trend in this report, it's this. The International Tourism Partnership says the hotel industry must reduce its carbon emissions by 66% by 2030, and 90% by 2050 (as compared to 2010 levels) to comply with the Paris Agreement climate change negotiations agreed at COP21. Carbon neutral strategies that were once the talk of the town are quickly becoming overshadowed by net-positive strategies. It's no longer about leaving the planet unvarnished, it's about attempting to leave the planet better than it was previously.



A 2023 Booking.com report saw 76% of travellers express a desire to travel more sustainably this year. It showed a pick-up in environmentally-conscious habits (67% turn off hotel air-con when not in use and 60% reuse towels – with a 29% and 22% leap respectively from the 2022 report). But the focus is not so much on the guest as it is on the property – and now the former can sniff out “greenwashing” with a keener nose than ever before.



B Corp certification is the highest accreditation for socially and environmentally aware companies and, so far, few hotels have managed to earn it. In 2021, Exclusive Collection became

the first group in the UK to do so. Its managing director, Danny Pecorelli, called it a “rewarding process” and that he was proud to spread the word that business is “as much about people and planet as it is about profit”. So far just 54 hotels and hospitality brands have earned B Corp status. Could you be next?

Inhabit Hotels lays claim to one of London's few B Corp hotels, Inhabit Southwick Street – its second property, Inhabit Queen's Gardens, will likely follow suit.

Accreditation demands more than renewable energy and recycling bins, though: Southwick Street collaborates with social enterprises such as London-based workshop Goldfinger, which produces furniture and educates disadvantaged young people on woodwork; promotes cruelty-free, locally-sourced in-room products and menus; and even offers mindfulness training for staff. Hotels need to think about – and implement – a wide array of sustainable practices to even begin to qualify.



Such practices include, but are not limited to: solar integration, locally-sourced amenities, food waste reduction initiatives, biophilic design, energy-efficient lighting, water conservation systems, sustainable building materials and more from the worlds of social enterprise, culture and wellness. Increasingly, hotel brands are creating sub-collections to celebrate the hotels that try: ie. Small Luxury Hotels of the World's Considerate Collection, and Beyond Green by Preferred Hotel Group.

Often, sustainability just takes a bit of out-of-the-box thinking; you could aim to achieve full net-zero emissions, like Room2 Chiswick (the world's first hotel to do so), or even tackle smaller measures like Lake District's the Yan, which has just launched a carbon calculated “Mindful Menu” – tallying the carbon footprint of each dish. The Vera in Tel Aviv is doing its bit, too, with a brand new anthology tour featuring local producers in the city, as is Colombia's Blue Apple Beach hotel (also a B Corp) thanks to its glass upcycling programme, enabling local women out of discarded Corona bottles. (It is also converting glass into industrial sand.) In the fight against climate change, every hotel helps.

Wellness Boosting

From sound baths to tarot sessions, avant garde betterment experiences are increasingly being woven into the independent hotel experience



Wellness Boosting

For the space-strapped hotel, a new epoch is upon us: “minor wellness” programming. The newest edition of RLA Global’s *Wellness Real Estate* report says that minor wellness has seen the highest growth (61%) in operational profit (and a 37% increase in revenue) in the first half of 2023 – that’s smaller, niche wellness offerings with a lower associated operating cost.

The gist of the data is as follows: minor investments in wellness at your hotel can be a roaring revenue generator, if done well. That’s because health-conscious travellers spend, on average, 35% more than others (Global Wellness Institute). The GWI also projects a 21% yearly growth rate for wellness tourism – holidays that target both physical and mental wellbeing – through to 2025. Reacting to this, Small Luxury Hotels of the World (SLH) has partnered with an emotional health advisor to create exclusive meditation audio and masterclasses at select properties.

Boutiques and smaller hotels can easily get a slice of the pie. Hotel Hoy Paris, a property which embodies many of the trends in this report, has a calendar of health-promoting activities from Yuj yoga to floristry workshops. You’ll even



find sessions on the intersection of Feng Shui and sexuality, reserved for female guests, as well as quartz crystal sound baths led by guest healers and clay pottery meditation classes. It also purifies its tap water with Japanese binchotan charcoal, encourages you to use its beautifully restored staircase, rather than the lifts, and has a “Care Room” with a “Care of the Month” treatment – October is an Ayurvedic massage.

Wellness alternatives – beyond say, in-house massages or yoga – can do well in garnering

PR buzz. Joali Being in the Maldives turned its sound bath experience into a jungle walk, with 12 instruments creating different vibrations. At Nimno Bay in British Columbia, it offers meditative kayaking excursions; while Chapel House in Penzance (UK), runs guided early morning sea-swims. Guests of Sensei Porcupine Creek (Greater Palm Springs) are delivered a WHOOP 4.0 fitness tracker before arrival, so the hotel can gather sleep and fitness data ahead of stays and craft a bespoke wellness itinerary before they’ve even arrived.

For those who like their wellness with a New Age spin, there’s a resident occult expert at London’s Kimpton Fitzroy who provides tarot readings to anyone wishing to lean into the recent manifestation craze. Wellness offerings can be inspired by location – the Tawny, near the Peak District, capitalises on its rural location with mindful star gazing nights. Forestis in the Dolomites leans into its locale with forest circle ceremonies while fellow mountain hideout, Hotel Hubertus, runs holistic coaching sessions to help guests achieve their ambitions, as inspired by the mountain summits, calling itself a combination of “nature experience and personal goals”.

Increasingly in the wellness space, almost anything can be monetised: take Blackberry Farm in Tennessee. Amongst its extensive roster of Wellness Boosting activities, a 50-minute guided journaling practice comes in at US\$150. Then there is the Byblos St Tropez which offers day-long “Epic Journeys” for €650 per person that include shamanic healing, “human design”, breathwork classes, and a gluten-free, vegetarian lunch. “It’s now about taking care of your inner self, as well as your outer self, says Byblos owner Antoine Chevanne.



Forestis / Otro Oaxaca

Locavore Sourcing

Independent hotels are in a unique position to hand-pick artisan craftspeople and food producers to furnish their interiors and stock their kitchens. On-site gardens are also growing in popularity as self-sufficiency rises to the fore

Locavore Sourcing

Locavorism isn't just sourcing produce from a 150km radius (although that is the traditional, gastronomic definition) – instead, it's about doubling down on a commitment to all local purveyors, be they farmers, brewers, distillers, vintners, craftspeople or furniture makers. Filling your hotel with locally-made goods is all about relationship-building, and being more conscious about the carbon footprint of produce and products that may have been flown half way around the world to get to you.

Independent hotels are in a prime position to lead the Locavore Sourcing movement, and in many respects already are because they don't need sign-off from big parent companies or consistency across an entire brand portfolio.

From Susafa hotel in Sicily and the Cretan Malia Park in Crete, to Keythorpe Hall and the Newt in the UK, kitchen gardens are becoming highly fashionable. Although it's part of Belmond, the unique Le Manoir aux Quat'saisons in Oxfordshire has two acres of land for growing Chef Raymond Blanc-approved veggies and claims one of Britain's 23 Green Michelin stars for sustainability.

Over in Japan, Shishi-Iwa House – which, earlier this year launched a new building on its campus called SSH No.03 – works with local suppliers such as Davos Farm and Cattle Ranch, where guests can visit for an artisanal tasting and talk on sustainable agriculture. It gets its wine from Kusunoki of Kusunoki Winery and coffee from Yudai Kosuge of Beard Coffee Roaster. Its "SSH" programme brings in these local suppliers for talks – in addition to its Pritzker Prize-winning architects – and monthly activities that centre around the produce and culture.

These days, more and more travellers are impressed by the naming of local providers on menus. In Edinburgh's Waldorf Astoria Caledonian hotel, restaurant Grazing by Mark Greenway makes for a fine template thanks to a new "100 Mile Menu" launched earlier this year. Its drink pairings show off Scotland's most exciting young distilleries, such as Nc'Neen and Buck and Birch, while smoked fish in its Arbroath smokie tart comes from 72 miles out, making it the ingredient sourced furthest from the restaurant. Perthshire lamb comes from 45 miles away, strawberries from 35 miles away, and Edinburgh honey from just 2 miles away.



"For me, to know where everything comes from is a big part of being sustainable," says Margaret von Korff, owner of agrotourismo hotel, Cas Gasi in Ibiza. Thanks to its permaculture beds, orchards, olive groves and chicken coops, Cas Gasi is now partially self-sufficient. And what it can't grow, it sources from other parts of the island.

Another opportunity lies in the humble minibar. At Inhabit Hotels in London, fridges are stocked by Social Supermarket, which is an ethical company that curates snacks and drinks made by social enterprises – its goal is to collaborate with at least 100 social enterprises by the end of 2023. At Le Majestic in Cannes, bartender Emanuele Balestra invents aromatic cocktails using unique extracts, bitters and jellies from the 70 herbs grown on his two on-site gardens.

Interiors also benefit from a more storied, locavore approach. The newly opened Hotel Verdant in Wisconsin is home to a permanent art collection featuring the work of 22 local artists. At Le Sirenuse in Italy, the hotel works with a local terracotta tile maker who still bakes ceramics in a straw oven, and displays handmade wicker chairs that guests frequently want to buy for their own homes.



Joyful Design

Independent hotels have always had the ability to express their own personality and sense of place but bold, colour-loving innovators are taking interior design to the next level

Joyful Design

In the past, travellers were drawn to the predictability of uniform chain hotels but as people have become more worldly, it's big colour moves from independent hotels that make the magazine covers. Essentially: maximalism is in, beige is out.

The nine-bedroom Villa Palladio in Jaipur (pictured on the cover, previous page and opposite) is a case in point – the interiors have design fiends weak at the knees with lacquered reds and pomegranate-pinks, loud prints and chequerboard floors. Co-founder and designer

Marie-Anne Oudejans even cooked up floral-print pants for the staff uniform. Fellow co-founder, Italian-Swiss entrepreneur Barbara Miolini, told *Architectural Digest*: “When travellers leave us here in the Pink City, I would like them also to remember the red.”

Saar Zafirir, founder of SZ Design, tells *Globetrender* of his most recent projects: “Clients are increasingly seeking a strong cultural narrative and design language that connects guests to the locale.” Connecting guests with Berlin’s sexy side, Zafirir’s vision for the Provocateur Berlin

(which is instantly recognisable for its sultry use of blood-red velvet) includes the now famous “Provocateur Switch”, which dims the lights, plays music and projects video art onto the walls. “To me,” Zafirir says, “this switch is the vanguard of the joyful design trend, offering not just a novel guest experience or a mere place to stay, but a nuanced narrative, a voyage into the delightful unknown”.

Paris is a particularly strong city to look at for inspiration: new opening Le Grand Mazarin is a Martin Brudnizki-designed cacophony of pastels and prints and Alice in Wonderland-esque quirks, with loud headboards, murals and a striped indoor pool. Sinner, another Le Marais hotspot, has a devilishly ecclesiastical theme, where cardinal-red elevators are dressed as confessional booths and stained glass windows line the dimly-lit corridors. Designer darling Luke Edward Hall, meanwhile, wanted Hotel Les Deux Gares to look “a little bonkers”, all candy-stripes, leopard prints and coloured glass. Throughout its 40 rooms, newcomer Hotel de la Boetie has thrown out white bed sheets in favour of pink. (A radical yet wonderfully easy manoeuvre.)

The “eccentric aunt” design trope has its psychological merit,



too. The “first night effect” – aka the disturbed sleep we tend to experience during the first night of staying somewhere new – can be offset with comforting, cosy décor. (Consider Kit Kemp Design Studio’s new Warren Street hotel opening in 2024 in New York, which will be rich in contrasting colours and textiles.)

Further design-trends-with-benefits include hyper-local decoration, using neighbourhood

artists, artisans and craftspeople to reflect the character of the local area through the hotel’s specific design aesthetic. In the age of Instagram, investing in a social-savvy colour consultant could prove fruitful (colour always makes a good background for photos). The Hoxton hotel brand recently went as far as collaborating with Bauwerk paint brand to create a custom range of hues for guests to decorate their own homes in.



Experiential Retail

The rise of “shoppable” interiors offers an exciting opportunity for independent hotels to create new revenue streams through branded merchandise, furniture, art and homeware that is all available for sale



Experiential Retail

Be it flea markets zoning in on tourism hotspots or cruise ship jewellers – retail and hospitality have long been bed-fellows; tourists are, after all, fantastically warm leads. It might not be a bad bet to say, soon, every hotel will have an in-house retail team or at least some kind of retail offering, as the rise and rise of experiential shopping uncovers a demand for curated, brick-and-mortar experiences.

Hotels who take this under consideration play with the possibility of not only additional revenue streams, but increased brand loyalty, as products purchased as part of your brand experience can sit in the bathroom cabinets and on bookshelves and coffee tables of former guests years after check-out. Globetrender recently spoke to the founder of Mama Shelter, a brand that now sits under Ennismore and Accor, and he shared that about 7% of their annual turnover comes from retail.

That's not to say any old general store will do. Aligning your retail proposition with your hotel identity is paramount. Look at Palm Heights, the Millennial-magnet with 70's style to spare in Grand Cayman: creative director Gabriella Khalid has infused the design of the

property with the same vintage iconography that plaster the insides of the first-edition tomes and retro magazines – *Interview*, *Holiday* and *Sports Illustrated* et al – that are stocked in its appointment-only bookshop, Library Fetish. The hotel has just launched an on-site concept store, Dolores, that celebrates designers of the Caribbean diaspora and sells plenty of Palm Heights merch for those who want to brag they were ever there.

Original pioneers of the concept, Ace Hotels' lobby stores are still going strong around the world;



its latest Toronto outpost sells “Lake Ontario is Great” socks and lighters branded by local cannabis dispensary, Superette, alongside the usual prints, robes and totes. Soho House, another earlier adopter, now has physical retail outlets for its homeware brand, Soho Home, and an online skincare brand, Soho Skin, beloved by members who receive a discount on purchases.

Destination des stars Byblos in St Tropez has a revolving “Exclusive Collection” that launches to much fanfare every five years: a series of “exclusive products” developed by “specialist houses who share our values” and prices befitting its ultra high-net-worth guestbook (think, mini Byblos trunks from French luggage brand Pinel et Pinel). Similarly, Leading Hotels of the World has teamed up with the hand-printed silk specialists at Camilla to launch a capsule collection inspired by six LHW properties in Italy.

There's plenty of inspiration to be taken from the increasing number of retailers carving a place in the hotel industry, too: Japanese retailer Muji currently shows off its minimalist homeware in three Asian Muji Hotels – the Ginza outpost even sits atop the city's flagship store. Danish design company Vipp launched its “one-room



wonders” – micro-showrooms, essentially, in various locations that allow you to trial the Vipp lifestyle, à la Airbnb. Next year will see more Vipp's open in upstate New York, Iceland and Tasmania. After checking in, you will be able to cook in a Vipp kitchen, put food in Vipp bins, sit on Vipp chairs and shower in Vipp bathrooms.

In the US, Detroit's Shinola hotel surrounds guests with Shinola's hand-crafted luxuries, while in Philly, Yowie founder Shannon Maldonado has long had designs on turning her cult store into a hotel, which she made a reality earlier this year – objet d'arts from the rooms can be purchased downstairs.

Micro Chains

Independent hotels are increasingly bolstering their presence with multiple locations to boost their brand, increase revenues and gain a competitive advantage against solo operators



Micro Chains

Any conflict between the independent versus chain/franchise binary largely exists on one argument: that turning the former into the latter is to sacrifice the former's magic touch. The rising trend of Micro Chains, however, proves that more and more hoteliers are managing to harness the benefits of expansion without losing that special something – should they have a concept worth repeating.

When CitizenM cut the ribbon on its first hotel in Amsterdam back in 2008, it opened up a new, value conscious, tech savvy frontier for frequent travellers: it will have 40 hotels and 8,545 rooms by the end of 2023. Selina began as one property in a small surf town near Pedasi in Panama in 2014 – the brand now has 134 premium hostels and counting, as the demand for off-road, nomadic, and community-centric travel thrives. Soho House's membership model proved so popular following its Greek Street start in 1995, it is now an internationally lauded brand with 40 – and growing – clubs worldwide (many of which have hotels attached). Reassuring, perhaps, to note is that it only achieved profitability after 28 years in business.



In the UK, Artist Residence and Guest House Hotels now have five and four hotels to their micro-chains respectively. The former started when founder, Justin Salisbury, invited artist friends to makeover his family's B&B in Brighton back in 2008. Guest House Hotels is a similarly familial affair – created by Tristan, James and Tom Guest, three brothers with no prior hotel industry experience. Both are regarded as two of the country's coolest boutique brands, with concepts that resonate with a roving fanbase: Guest House Hotels

pack historic buildings with wonder and whimsy, stocking a free 24/7 pantry and placing signature record players and vinyls into each room. Artist Residence, meanwhile, teases out guest's inner-creatives with modern art, one-of-a-kind beds and upcycled furnishings.

As for the US market, data by Future Market Insights anticipated that the boutique hotel market would be worth between US\$95 billion and US\$98 billion by the end of 2023, and that it'll reach US\$115 billion by 2032. Ace Hotels –

founded in Seattle – was an early pioneer of the boutique chain concept and has largely contributed to this current statistical success. Following in its wake, American-brand Graduate Hotels, which is focused on providing accommodation for students and parents in university towns, is now a trans-Atlantic affair, with 31 properties in the US and UK.

Life House is gaining similar momentum – its sixth hotel arrives this November in Palm Springs, with Brooklyn, Miami

and its first overseas outpost in Bali all on the horizon. The brand calls itself “locally rooted” and “contextually designed” and has earned a legion of fans for its Insta-friendly aesthetic. The European equivalent might be Sir Hotels, which now has six properties across the continent with a Sir Explore programme that curates custom city guides featuring tours and workshops led by talented local characters. Its hotels – Sir Joan, Sir Victor, Sir Nikolai – all have an interesting story behind them that's rooted in the neighbourhood.

A huge barrier to Micro Chains is cost and time, but just look at Habitas, which seems to have managed to skirt both. Whereas traditional hotels take four to five years to design, build and open, Habitas' disruptive manufacturing model (using flat-pack structures) takes this down to less than one. It's a sustainability win and a financial one too, giving a quicker return on investment. Expect glamping fans to follow Habitas around the world just as fashion-fiends flock to the Standard, and F&B enthusiasts stumble their way into the Experimental Group via their bars and restaurants – so long as Micro Chains continue to represent the concepts, service and interiors worth following.



Big Brand Takeovers

Many legacy hotel chains are investing in boutique operators to diversify their portfolios and tap into new audiences

Big Brand Takeovers



Bigger legacy chains are looking to cash in on the recent power shift toward indie hotels as demand for distinctive design and personalised service flourishes. Many of them, therefore, have set about acquiring and launching their own boutique collections – which have net positives for them as acquirer and indeed, for the acquiree, who suddenly has direct access to an international sales and marketing infrastructure, plus revenue management and distribution teams.

Take for instance Marriott International's acquisition of

Design Hotels (100% ownership was achieved in 2021), which sees the titan resources of Marriott fold design-savvy, indie hotels into the brand with a few marketing and aesthetic tweaks, should they see potential in the property. See also its Autograph Collection and Tribute Portfolio – both made up of independently-owned hotels under the global loyalty-point-acquiring machine that is Marriott.

Accor, too, is expanding into independent spaces. The Paris-based giant closed on a joint venture with Ennismore in late 2021, merging the latter's myriad brands – the Hoxton, Gleneagles, Tribe, Mama Shelter

– with Accor's existing portfolio. Ennismore co-founders Sharan Pasricha and Gaurav Bhushan continue to lead the group as a somewhat autonomous entity and it's crucial that they do, lest deep, corporate uncool suffocate what makes their lifestyle brand worth buying in the first place. Bhushan said of the merger: "Our teams are ready and eager to build on each of our unique lifestyle brands, with a dynamic global pipeline, creating an ecosystem of memorable and curated experiences across all our properties". So far, so exciting.

There's a new "soft brand" from Accor, too: Handwritten

Collection – a new "one-of-a-kind-concept inspired by individual hoteliers" that launched earlier this year. By 2030, it could comprise 250 hotels. Alex Schellenberger, global chief marketing officer at Accor, has said: "Our aim, beyond delivering a truly authentic guest experience, is to support the growing number of independent and boutique hotel owners looking to boost their global profile, connect with more audiences and grow their revenue without losing their identity."

For many independent or family owned hotels, a mega-brand can be just that – but,

like Ennismore's retention of its co-founders, an element of creative control is imperative. Independent hotels might want to think about the Design Hotel model – whereby hotels position themselves as their own brands, with Design Hotels accreditation, on their own individual websites, as well as featuring on a dedicated Design Hotel webpage alongside.

The digital experience of Tapestry Collection by Hilton, a roster of independent hotels under Hilton's brand broly, by contrast is only available via Hilton's own website – and thus, already that crucial individuality, one might argue, is eroded.



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