CONCEPTIONAL©

2026

CONCEPTIONAL FOOD & BEVERAGE TREND REPORT

HOTELS

EUROPE

(Sir Hotels, nd)

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(Hoxton, nd)

Introduction

Dear readers,

We, as Conceptional, are proud to present to you our 9th Trend Report, this time focused on F&B within hotels. Based on our experience and perspective, the hotel industry is vast and diverse. To deliver the most value and expertise, we specifically zoom in on the **trends shaping F&B in the hotel market, with a clear focus on Europe**.

Hotels are redefining their approach to F&B. **Once seen as a supporting amenity, F&B is now becoming a key differentiator in guest experience, brand identity, and profitability.** Across Europe, Hotels are transforming their restaurants, bars, and lobbies into vibrant social hubs, appealing not just to overnight guests but also to locals and digital nomads. This shift is driven by travellers seeking authenticity, sustainability, and flexibility, alongside the growing influence of lifestyle brands that blur the lines between hospitality, community, and gastronomy.

This report outlines how Conceptional views the role of F&B in today's Hotel landscape. The **focus here lies on 3 and 4-star hotels,** excluding resorts, spa's and hostels. It dives into market developments, explores generational shifts in guest behaviour, and highlights key F&B trends across Hotels. In addition, we highlight best practices drawn from both our own recent projects and leading industry examples that exemplify the key F&B trends shaping the future of F&B in hospitality.

By sharing these insights and takeaways, we aim to inspire and support you in strengthening your F&B strategy, whether you're developing a new destination or optimising an existing concept.

Let's shape the future of F&B together.

Enjoy the read!

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(Soho House, nd)

1. How does Conceptional view F&B within the hotel market?

“F&B reinforces the brand’s identity, shapes atmosphere, and drives guest satisfaction in ways the room alone cannot do.” - Conceptional

(Coman, nd)

At Conceptional, we see a clear shift taking place across the European hotel sector. More and more hotels are reimagining F&B as a **strategic part** of the guest journey, a way to create identity, connection, and added value. Today’s guests expect more than convenience; they seek **connection, authenticity, experience, and quality**. By more thoughtfully integrating F&B, hotels can **transform** these F&B services from merely functional **to truly memorable**.

As the hospitality market continues to grow and new restaurant concepts emerge rapidly, it is becoming increasingly difficult for hotels to keep up. **Expectations are higher** than ever, and hotel F&B can no longer rely on convenience alone. Successful hotels are transforming their F&B into destinations, vibrant places that exist for more than just serving in-house guests. Yet, many hotels still treat F&B as a necessity, focusing mainly on breakfast and operational efficiency rather than emotion and storytelling. With growing competition from independent, experience-led restaurants nearby, hotels face the **challenge of staying relevant**, visible, and competitive, all while managing staff shortages and the temptation for guests to dine elsewhere.

To stand out, hotels must offer guests a reason to stay and locals a reason to visit. **Creating destinations** means curating spaces that are lively **throughout the day**, from breakfast to dinner, and all the moments in between. Each touchpoint, morning coffee, lunch, after-work drinks, or a late-night bite, is an opportunity to **connect**, **inspire**, and **build loyalty**. Pop-ups, collaborations, and exclusive dining experiences can help create excitement and a sense of discovery. By doing so, hotels can attract both guests and locals, **strengthen community engagement**, and capture revenue that might otherwise leave the property.

At Conceptional, we believe F&B requires a different way of thinking. Real impact comes when F&B is seen as an experience, not a function. It demands creativity, strategy, and a mindset that connects design, storytelling, and guest flow into one coherent journey. By integrating F&B more deeply through smart marketing, flexible all-day formats, and meaningful guest touchpoints, hotels can create places people truly want to be. When treated with the same care as the overall concept and atmosphere, F&B becomes a destination in itself: **a reason to stay, return, and connect**. This is what drives us at Conceptional; ‘’We create sustainable F&B concepts and places that understand and surprise you and your guests’’.

Key Market Takeouts

F&B remains **underutilised**, despite its **potential** to significantly drive guest numbers, dwell time, and the overall customer experience.

F&B shapes the overall hotel experience by influencing guest satisfaction, perceived quality, and the sense of place.

F&B concepts can be **adapted** to any place by **tailoring the offer**, experience, and operations to the specific context, audience needs, and location.

(Hoxton, nd)

Hotels

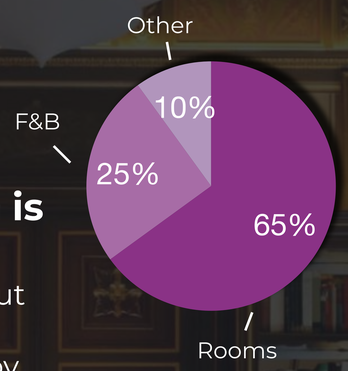
(CitizenM, nd)

2.1 Hotel Market Outlook

F&B options in cities are increasing.

F&B options have been increasing, which is unfavourable for hotels

F&B spend revenue in hotels has grown over the year, but its position is under pressure. Today's guests are increasingly choosing to dine outside the hotel, driven by the growing variety of F&B options and their desire to experience the local atmosphere or a specific culinary concept. Even when they decide to stay in, hotels face added competition from the rise of food delivery services. (1)



An average of 25% of revenue originates from F&B

F&B has great impact on revenue

F&B spend revenue has grown over the years.
As it makes up for a quarter of the income, hotels shouldn't overlook its potential. (2, 3)

The Netherlands expects a maximum of 30% drop in guests

The VAT increases by 12%

The Dutch VAT for lodging will shift from 9 -> 21% in 2026. It is expected that overnight stays will decrease by a maximum of 30%. (4)

Increase in domestic travel by 4.4%

European travel spending is expected to grow 4.4% yearly

People are more likely to stay in their own country for a trip or a weekend away. Thus, will there be a growth in local demand.
71% of the trips Europeans took were short, domestic trips. (5)

66% is detained by the 'Big Five'

Italy, Spain, Germany, France and the UK make up of 66% of the hotel nights of the European hotel market

Accounting for twice the volume of all other European markets combined.(6)

Nordic countries are increasingly popular

There is an occupancy increase of 4,5%

The growing temperatures have become a burden to many travellers. Leading them to visit more Nordic countries. (7)

(Cotton House, nd)

2.2 Generational Shifts Within the Hotel Market

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(Keriliwi, 2025)

Hotels are undergoing a significant generational shift, with **Millennials, Generation Z, and Generation Alpha** now representing a growing share of the visitor base. Their evolving values and expectations are reshaping the industry. Their decisions are based on lifestyle, with an increasing emphasis on technological integration, online presence, personalisation, experience dining, and sustainability practices.

These generations are experience-driven and focus on finding new and unique destinations. They use social media to research their hotel and find the **best possible price**. Eventually, these generations feel most welcome and satisfied when they are being pampered.

1. Reason to visit

New generations seek memorable, shareable experiences that go beyond comfort and convenience. **They are willing to spend time and money on such experiences.**

2. Spending habits

The new generations tend to spend more frequently but lower amounts compared to boomers. They focus on budget accommodations and are only willing to splurge when they see the added **value of an experience or product.**

3. Social Media

These generations discover new restaurants or brands on social media like TikTok and Instagram. **An average of 73% use these as search tools for F&B**. (8)

4. Loyalty

Loyalty models, such as apps or memberships, align with the generation's **desire for personalisation and tangible rewards**. It can promote various touchpoints within the hotel, which will ultimately increase revenue.

2.3 F&B Trends and Developments within the Hotel Market

1. *Experience-driven F&B*

Pop-ups and events create dynamic and growing experiences to interest hotel guests and locals. By doing this, hotels will attract more guests to their F&B offerings. They will be able to stay relevant for a wider customer segment, contribute to the local scene, and retain guests through new events.

- **The Social Hub, Europe**
- **Sir Hotels, Europe**

2. *All Day F&B*

All-day F&B concepts in hotels blur the lines between dining, working, and social events. These spaces cater to evolving guest rhythms and local lifestyles. By adapting menus and service styles, hotels can increase revenue, enhance guest satisfaction, and attract locals seeking an easy, inspiring spot to meet or unwind.

- **Permit Room, Dishoom, UK**
- **Nomon, Carlton Beach, The Netherlands**

3. *Local Connection*

Guests seek to explore cities by their F&B. By implementing this connection in local design, sourcing regional ingredients, and partnering with cultural initiatives, hotels create experiences that reflect their surroundings. The hotel will be a reflection and recognisable point for the area and create a community feeling.

- **The Cotton House, Barcelona**
- **Hotel Jakarta, Amsterdam**

4. *Hotel Workspaces*

Hotel F&B creates opportunities beyond overnight guests, attracting remote workers, freelancers, and business travellers. By offering flexible workspaces, day passes, or memberships with Wi-Fi, coffee, and amenities, hotels blend hospitality with productivity and turn their spaces into appealing work environments.

- **The Usual, Europe**
- **Zoku, Europe**

(The Ned, nd)

2.3 F&B Trends and Developments within the Hotel Market

5. *Technology*

Technology in hotels boosts efficiency and elevates the guest experience. Mobile check-ins, digital keys, smart room controls, and AI concierge services create seamless, personalised stays. Rather than replacing human touchpoints, technology enhances them and improves overall operations.

- **CitizenM, worldwide**
- **Cloud 7 Hotels, Europe, SA, Asia**

6. *Consious breakfast*

Hotel guests increasingly seek healthier, adaptable options like plant-based dishes, fresh juices, and protein-rich choices. Local and seasonal ingredients adds authenticity and reduces environmental impact. At the same time, hotels elevate the experience by shifting from buffets to curated breakfast menus, while offering more flexibility through grab-and-go items and all-day breakfast options.

- **The Zetter, London, UK**
- **CitizenM, worldwide**

7. *Lifestyle vitality*

The lifestyle vitality trend reflects a growing demand for experiences that combine wellness, fitness, and mindful living. This translates into offerings like healthy, locally sourced F&B concepts, fitness options, spa amenities, and community-oriented activities such as yoga or running clubs. Showing a shift from luxury to lifestyle wellness, appealing to health-conscious travellers.

- **Ett Hem, Stockholm**
- **Cloud 7 Hotels, Europe, SA, Asia**

8. *F&B Outsourcing*

Outsourcing F&B allows hotels to strengthen their offering without managing operations in-house. By partnering with operators or brands, hotels gain high-quality concepts, reduced operational risk, and better cost control. This approach elevates guest experience, attracts non-hotel visitors, and keeps spaces vibrant, while letting the hotel focus on its core hospitality service.

- **W Amsterdam, The Netherlands**
- **Mama Shelter, Paris, France**

(The Ned, nd)

(The Ned, nd)

1. Local connection
2. Consious breakfast

The Ned

4 locations, UK, USA and Dubai

The Ned is a luxury hotel and membership club that offers extravagant stays and has 8-10 different F&B outlets that bring everything from casual dining to upscale menus. The history of the building contributes to the classical atmosphere and elevates storytelling.

The hotel provides a luxury-style breakfast served in an à la carte format. They strive only to use fresh and local products, so that guests can experience the local flavour. On Sunday's they bring out a special brunch menu to elevate the

(Casa Bonay, nd)

1. Local connection

2. Experience driven F&B

Casa Bonay

Barcelona, Spain

Casa Bonay hosts events shaped by Barcelona's culture: DJ nights, creative workshops, rooftop gatherings, and collaborations with local brands, artists, and collectives.
Casa Bonay doesn't just reference Barcelona; it operates as part of it. Their model embodies the local connection trend through authentic partnerships, local cultural programming, and a design and operational philosophy that ingrains the hotel into the neighbourhood ecosystem.

1. Hotel workspaces
2. Local connection

The Hoxton, Brussels

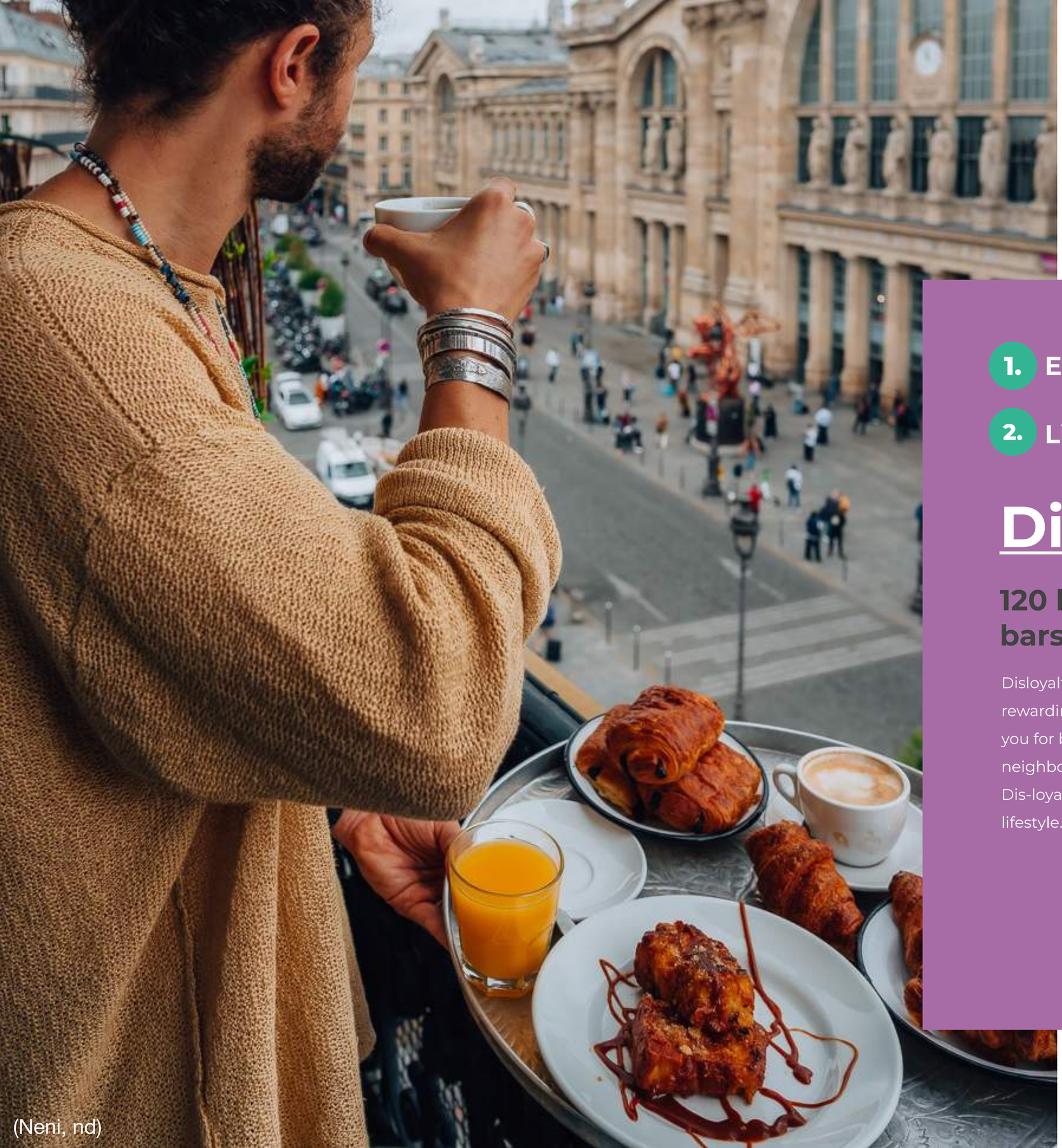
Hoxton 19 locations, Europe & USA

The Hoxton aims to combine cool, boutique-style hospitality with neighbourhood-rooted authenticity.

The Hoxton Brussels launched ‘Working From’, offering all the practical things you’d expect from a coworking space, with some Hoxton extras. This includes meeting rooms, co-working spaces, private or open studios, breakout spaces, and a members-only café.

Guests can subscribe to a monthly membership that allows them to access the coworking facilities at the Hoxton. The fee they pay for this is dependent on the type of membership guests choose, varying on the amenities included.

(The Hoxton, nd)



(Neni, nd)

1. Experience driven F&B
2. Lifestyle vitality

Dis-loyalty

120 hotels and 200 restaurants, bars, and coffee shops worldwide

Disloyalty is a travel and food membership. Instead of rewarding you for staying loyal to one hotel brand, it **r**ewards you for being disloyal, exploring different hotels, new neighbourhoods, and new cities.
Dis-loyalty rewards a dynamic, exploratory, socially active lifestyle.

(Six Senses Douro Valley, nd)

1. Experience driven F&B
2. Lifestyle vitality

Six Senses Douro Valley

Lamego, Portugal, 27 locations, worldwide

The Six Sense hotels position themself at the intersection of wellbeing, nature, movement, and sensory activation into every part of the guest journey.

The focus of Six Senses Douro Valley lies on sustainable and healthy experiences in combination with wellness. It features 4 F&B outlets offering a wide variety of seasonal, nutrient-rich dishes with bold flavours that connect you to the region.

The focus of wellbeing is highlighted in their services, such as breathwork sessions, sleep enhancement programs, and nutrition consultations.

(Mindtrip, n.d.)

1. Outsourcing F&B

NENI, Berlin

25hours Hotel Bikini Berlin, Germany

At the 25hours Hotel in Berlin, the outsourced F&B concept is operated by NENI. NENI is a family-run restaurant that combines traditional Middle Eastern cuisine with a modern touch. The focus lies on sharing and enjoying food together with all senses. The restaurant also provides a panoramic view over Berlin and the Berlin Zoological Garden.
By outsourcing the restaurant, 25hours Hotel will can more external demand. Additionally, enhances their brand differentiation and position.

Case Highlights Conceptional

Nomon, Carlton Beach Hotel
Scheveningen, The Netherlands

Nomon at the Carlton Beach Hotel in Scheveningen is a tribute to the North Sea and the beach area. They demonstrate this connection through their menu, design, and atmosphere. Conceptional created an all-day dining concept that allows for approachable luxury with the comfort of the beach.

1. All-day F&B
2. Local connection

(Carlton Beach, nd)

CitizenM Hotels
London, UK

Conceptional collaborated with CitizenM in London to create hybrid F&B spaces. Creating a space where guests can work, meet and relax. Implementing the CanteenM concept created a 24/7 bar-restaurant you can enjoy a meal or a small snack at any time of day or night.

1. All-day F&B
2. Consious breakfast

(CitizenM Dublin, n.d.)

WHAT WE DO?

CONCEPTIONAL©

CONCEPT DEVELOPMENT
WE CREATE RESTAURANT CONCEPTS WITH A HEART.

F&B MASTERPLANNING
WE CRAFT STRATEGIC VISIONS FOR HOTELS WITH MULTIPLE F&B VENUES.

STRATEGY & TRANSFORMATION
WE SUPPORT SUSTAINABLE GROWTH AND SUCCESSFUL TRANSFORMATIONS.

SUSTAINABLE FOOD ROUTE
WE IMPLEMENT SUSTAINABILITY INTO YOUR VISION, ORGANISATION AND F&B OFFERING

(The Social Hub, nd)

Who are we?

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Reoewein Niesten
Founder & CEO

Fred van Aken
Managing Partner

Dirk van den Wijngaard
Creative Director

Hans Bruning
Associate Partner

Jeanne Dinkgreve
Senior Concept Developer

Stefano Zese
Senior Concept Developer

Lennard Poillot
Senior Concept Developer

Ronald Groen
Senior Kitchen Specialist

Andres Gonzalez
Business Developer MENA

Anastasiia Hrin
Business Developer MENA

Hidde Verschuren
Medior sustainability specialist

Marina Gonzalez
Medior Concept Developer

Judit Szöllősi
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Noor Mulder
Trainee

Daan Venninckx
Trainee

analyse.
amaze.
enjoy.

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F&B **CONCEPT DEVELOPMENT** . F&B **MASTERPLANNING**
F&B **SUSTAINABLE FOOD ROUTE** . F&B **STRATEGY & TRANSFORMATION**

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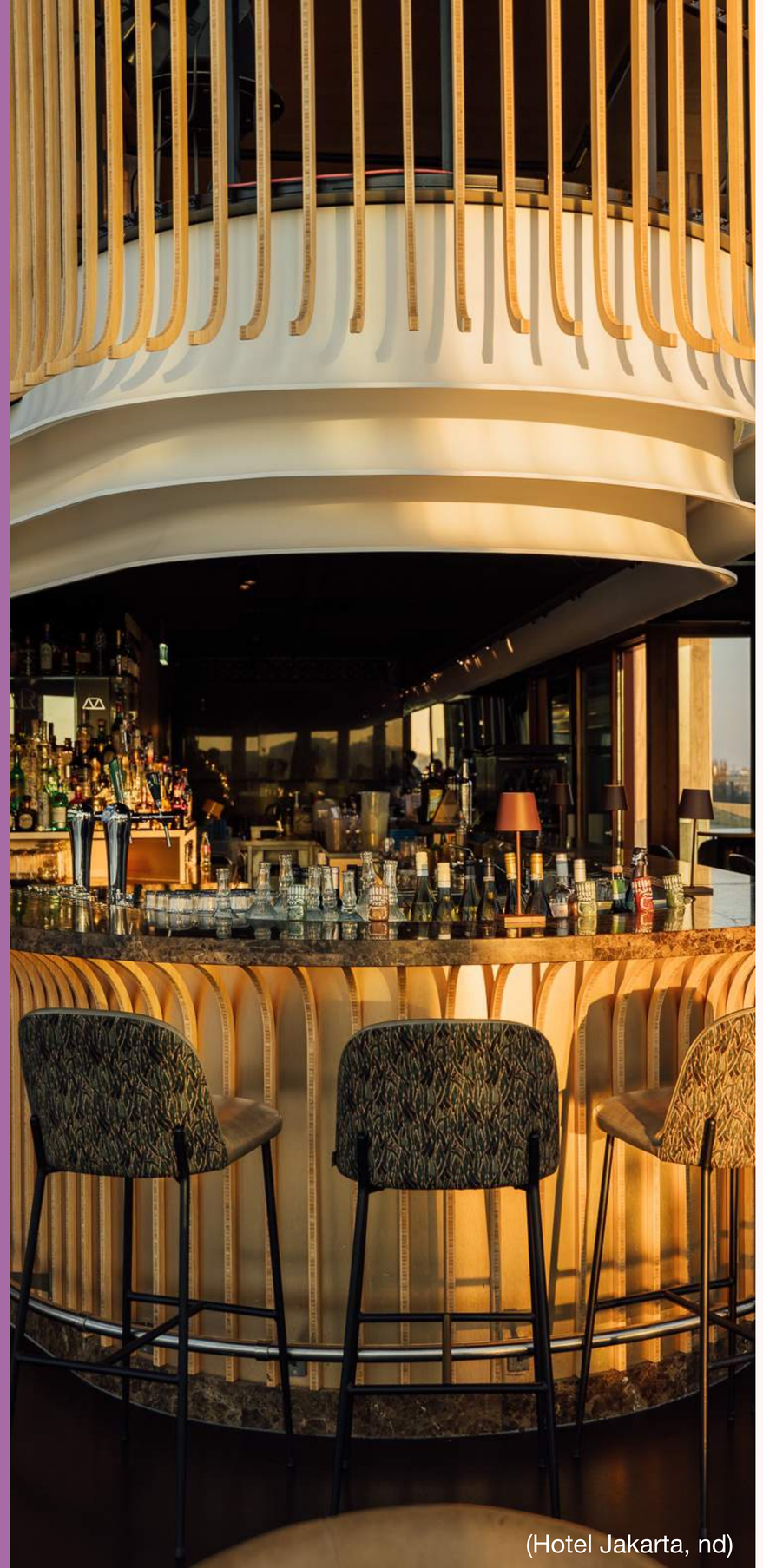

(Hotel Jakarta, nd)

Interested how we can elevate your F&B experience within leisure? Give us a call!

Do you also believe F&B deserves the best attention and care in your foodservice or leisure company? Do you think that your guests deserve the best attention and care? Looking for a reliable, experienced business partner to develop F&B concepts and places that work? We at Conceptional are keen to discuss options in more detail with you. Let us understand and surprise you and your guests!

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