

# RBH Mindset

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## Decoding the luxury staycation



# The Changing Anatomy of the Luxury Escape

Standard economics assumes we are perfectly rational calculating machines. Behavioural science knows we're not. We are highly emotional, largely irrational primates who just so happen to have credit cards.

For decades, the ultimate luxury status symbol was an overwater villa in the Maldives. Total isolation, endless sunshine, and a 12-hour flight to get there. It was the ultimate exercise in expensive signalling. Today, however, the status currencies have shifted. Thanks to a mix of economic reality, environmental guilt, and a fundamental rethink of what we actually value with our time, the UK staycation isn't just a pandemic-era fallback plan anymore. It's the premium, prestigious first choice.

Discerning travellers are trading long-haul misery for ultra-premium domestic experiences. They want the bespoke service and privacy of a tropical resort, but they

want it grounded in deep British heritage and authentic sustainability. Places like Chewton Glen, Heckfield Place, Soho Farmhouse, and The Newt in Somerset haven't just capitalised on this—they've entirely rewritten the rules of the English country house hotel.

But here's the catch: marketing to this crowd requires a completely different approach. The hospitality industry often forgets that it is fundamentally in the entertainment business. You cannot simply list your amenities and expect people to care. The secret weapon for the most successful brands today is mystery.

By deliberately holding back information and cultivating an aura of exclusivity, they turn passive observers into highly motivated buyers. In this report, we're unpacking the irrational psychology pulling the modern elite away from tropical islands, and showing you exactly how to market to them without ruining the magic.





# The Macroeconomics of the UK Staycation Market

Let's look at the numbers. The domestic travel market isn't just surviving the ongoing cost-of-living crisis; the premium tier is actively thriving.

## Trading Up and Intentional Spending

In 2024, domestic overnight visitors spent £32.9 billion on trips within Great Britain—a 5% increase from 2023, even though the actual number of trips dipped slightly.<sup>1</sup> What does that tell us? People are trading up. The average spend per domestic overnight trip surged 17% year-on-year to £312 per person, and the average spend per night hit £107.<sup>1</sup>

The total UK luxury travel market generated \$107,206.9 million USD in 2025 and is on track for an 8.8% compound annual growth rate through to 2033.<sup>2</sup>

Market Metric	2024/2025 Baseline Data	Projected Future Value	Growth Indicator
Total Domestic Overnight Spend	£32.9 billion (2024)	£55-£60 billion (Early 2030s)	+5% YoY in 2024
UK Luxury Travel Market Value	\$107,206.9 million USD (2025)	\$209,236.2 million USD (2033)	8.8% CAGR (2026-2033)
Average Spend Per Trip	£312 per person (2024)	Continually rising	+17% YoY
Average Spend Per Night	£107 (2024)	Continually rising	+16% YoY
Average Booking Window	105 days (2025)	180 days for 'bucket list' stays	8% shift to later general bookings

The market has sharply bifurcated. While tighter budgets squeeze some out of travel entirely, households with healthy finances are actively increasing their holiday funds. They see booking luxury as a rejection of standard, commodified travel. It's all about "intentional spending." People want to collect meaningful moments rather than material things. In fact, 79% of surveyed luxury travellers plan to spend more on trips in 2026.<sup>3</sup>

# The Rise of the “Micro-Break” and Hedonic Adaptation

How we holiday is changing, too. In 2025, 84% of UK consumers took a holiday, but the overwhelming winner was the “micro-break.”<sup>4</sup> For 2025 bookings, 48% of all UK stays were short breaks of six nights or fewer.<sup>1</sup>

Why? Because of a psychological principle called ‘hedonic adaptation’. The rather sad truth about human nature is that nobody actually wants a holiday to last forever. If you spend 14 days in Barbados, by day twelve you are usually quite chipper about the prospect of flying back to Dorking. The human brain thrives on contrast. Rather than blowing the annual budget on one massive trip that inevitably loses its novelty by the second week, affluent consumers are spreading their money across multiple, highly curated short breaks within the UK. It maintains the psychological contrast that makes a holiday actually enjoyable.



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# Shifting Consumer Psychology: Wellness, Gastronomy, and Grounding

What does luxury even mean in 2026? It's out with the gold leaf and in with "quiet luxury." Today's affluent guest appreciates beauty in bareness, seeking spaces that offer an intentional disconnection from our screen-obsessed world.<sup>5</sup>

## The Era of "Quiet Luxury"

Comfort, space, and absolute quiet are the new status symbols. Nearly 80% of affluent travellers consider peace and quiet essential, expecting top-tier soundproofing and calming, minimalist design.<sup>6</sup>

We're seeing a huge rise in monastic-inspired escapes—think whitewashed interiors, thick stone walls, and open fires. People don't just want a rest; they want a complete psychological reset.

## The Spa Evolution: Longevity and Sauna-Cations

A quick massage and a dip in a hot tub just won't cut the mustard anymore. The 2026 staycation market is defined by holistic, advanced wellbeing. Spas have transformed into destinations for preventative healthcare and longevity therapies. Enter the "sauna-cation." Guests are actively travelling for contrast therapy suites, cold plunges, and high-tech interventions focused on long-term vitality rather than short-term pampering.



### **Hyper-Local Agritourism**

At the same time, the “foodie” experience has evolved past performative menus. It’s all about hyper-localism and hyper-seasonality. UK estates are drawing crowds by operating as working farms. Ingredients are pulled from the kitchen garden that morning, and menus shift with the agrarian calendar. Why? Because a genuine, muddy-boots connection to the land signals authenticity—a highly valuable, scarce resource for the modern elite.



### **Heritage as the Hook**

Perhaps the biggest shift is that heritage has officially overtaken food, wellness, and nature as the number one reason travellers book a luxury break.<sup>6</sup> Seventy-five percent of affluent respondents prioritise historic and cultural experiences.<sup>6</sup> This is a massive competitive advantage for British boutique hotels. A 400-year-old manor house has centuries of built-in narrative that a purpose-built international resort simply cannot fake.

# Maldives vs. The English Countryside

To understand why someone would spend thousands of pounds in Hampshire rather than the Indian Ocean, you have to look at the psychological trade-offs they're making.

## The Friction of Paradise

A massive chunk of global tourism is driven purely by bragging rights. People will endure immense logistical misery just to secure the social cachet of having been to a specific place. The Maldives built its reputation on this exact premise: absolute geographical isolation, overwater villas, and total disconnection.<sup>7</sup>

But getting there is a spectacular headache. You're dealing with long-haul flights, stopovers, and seaplane transfers.<sup>8</sup> The sad but inescapable truth about the transport industry is that it's run by engineers who are desperately trying to pretend they're not in the entertainment industry. They focus on the logistics while ignoring the fact that for a time-poor executive, the friction of transit eats up far too much of the holiday's actual joy. Plus, importing luxury goods to remote atolls creates a massive carbon footprint that sits uneasily with today's eco-conscious consumers.<sup>10</sup>



## The Maldivian Resort

Long-haul flights, high friction.<sup>9</sup>

Total isolation, overwater villas.<sup>7</sup>

High carbon transit; import reliant.<sup>10</sup>

Pets excluded.

Imported luxury ingredients.

## The UK Luxury Staycation

Short drives, immediate immersion, low friction.<sup>15</sup>

Rolling estates, historic manors, ancient woodlands.<sup>5</sup>

“Climate confidence,” hyper-local sourcing.<sup>5</sup>

Highly pet-friendly.<sup>14</sup>

25-mile menus, foraging, farm-to-fork.<sup>5</sup>



## The UK Counter-Narrative

UK boutiques don't try to fake the tropics. They lean into convenience, moral alignment, and zero friction.

### 1. Frictionless Travel

Finish your Friday meetings in London and be drinking local cider in a 400-acre estate by dinner. No jet lag, no passport stress, no airport queues.<sup>11</sup> You immediately slip into the holiday state of mind.

### 2. Climate Confidence

Sustainability is a core booking factor. Affluent Brits want “quiet sustainability” — actions that feel genuine, like supporting local agriculture and reducing food miles, rather than performative “eco” branding.<sup>6</sup>

### 3. Bringing the Dog

It sounds absurdly simple, but pet tourism is a massive, irrational driver of human behaviour. Families hate leaving their dogs behind. Offering genuinely high-end, dog-friendly accommodation taps into a deep emotional need that long-haul travel completely ignores.<sup>14</sup>

# The Three Irrational Triggers of Luxury Choice

If you ask a guest why they booked a £1,500-a-night treehouse in Hampshire, they will give you a wonderfully rational list: the quality of the locally sourced food, the convenience of the drive, the thread count of the sheets. They are lying to themselves. Behavioural psychology tells us that people make a lightning-fast, intuitive emotional judgement first, and then deploy slower, reflective rational thinking to justify what they have already decided to do. Emotional impact is the true metric of luxury success; the hidden driver is how the brand amplifies how the consumer feels about themselves.

When we strip away the post-rationalisation, the choice between luxury options boils down to three core emotional triggers:



## 1. Signalling and Status

Deep down, everyone wants to feel unique. Merely being able to afford a luxury good or experience puts you in a minority, but true status comes from knowing about something others do not. Choosing a highly exclusive, unlisted, or “secret” hotel acts as a powerful status symbol. It is a classic case of expensive signalling. A significant portion of global tourism is driven by these bragging rights—the visceral desire to casually drop a highly coveted, hard-to-access destination into a dinner party conversation.



## 2. Transformation and Grounding

Today’s executives do not just want a holiday; they want to be fixed. Rest has become a deliberate objective rather than a mere by-product of travel, with emotional wellbeing, reconnection, and psychological recovery now standing as the strongest motivations behind luxury trips. Affluent clients are ultimately buying transformation. They are emotionally driven to seek out environments that offer absolute peace, a muddy-boots connection to the land, and a verified escape from digital burnout.

## 3. The Curiosity Gap

This is the psychological itch. When we are presented with a partial picture—a glimpse of a walled garden, a whispered rumour of a hidden suite—it creates a gap in our knowledge. This gap produces a literal feeling of deprivation.<sup>35</sup> By deliberately withholding information, clever luxury brands bypass rational price comparisons entirely. The consumer is compelled to book the room simply to resolve the emotional tension of not knowing what is behind the door.



# The Danger of Over-Sharing: Why Marketing Needs More Mystery



If you want a guest to part with serious money for a domestic retreat, you have to bypass their rational brain and operate purely on emotion. The worst possible way to do this is to give them all the information upfront.

## The Hospitality Blind Spot

Over the last thirty years, the luxury hotel industry made a catastrophic strategic error: they started chasing scale over exclusivity, and in doing so, they lost their charm. Fearing they'd look like spammers, hotels handed their demand generation over to Online Travel Agencies (OTAs).<sup>17</sup> They lost control of their own story.

Worse, they decided to show us everything. If your website and Instagram show a brightly lit catalogue of every single room, menu, and amenity, the guest feels like they've already consumed the experience. There's no mystery left. Your hotel ceases to be an emotional purchase and becomes a rational spreadsheet comparison of square footage and price against a resort in the Maldives.<sup>18</sup> They optimise completely the wrong metrics, focusing on efficiency rather than what customers actually care about.

Contracts, full transparency, and real legal support are now foundational. Legislation is racing to catch up. The EU set the bar with the AI Act – the world's first enforceable framework for AI, promoting transparency and banning some high-risk practices. In the US, lawsuits are multiplying: the Copyright Office has ruled AI-generated works without human authorship aren't copyrightable, muddying legal waters. Cases involving Getty Images and The New York Times suing over content scraping highlight the growing intensity of IP debates.

The bottom line: brands must stay alert – not just to avoid trouble, but to protect their reputation. Transparency throughout the creative chain and strong legal backing are essentials in this rapidly changing field. The best teams blend innovation with robust guardrails, ready for whatever's next.

## Engineer the Mystery

That's why RBH and agencies like us use waivers and release forms for every person, likeness, or asset AI touches. Securing proper permissions up front means assets are safe to use, wherever and whenever needed, without legal headaches. This focus extends beyond copyright: ensuring legitimacy for every face, voice, or creative input keeps both brands and agencies protected. Compliance in AI marketing means active, robust agreements – so innovation never comes at the expense of brand safety.

## The Cult of Invisibility

The ultimate power move in boutique hospitality right now is the unlisted suite. Ultra-luxury properties are actively hiding their best rooms from public websites and search engines.<sup>20</sup>

No photos. No floor plans. No pricing. You can only book them if you already know they exist, or if you know who to ask.<sup>20</sup> By making the product invisible, its perceived value skyrockets. It appeals directly to ultra-high-net-worth individuals who see insider access and absolute privacy as the highest forms of luxury.<sup>21</sup> It's artificial scarcity at its absolute finest.



# Brand Deconstruction: Who is Getting it Right?

Let's look at the UK brands successfully harnessing mystery, provenance, and human psychology to build fiercely loyal communities.

## **Soho Farmhouse: Exclusivity as Social Currency**

Set on 100 acres in Oxfordshire, Soho Farmhouse is a masterclass in modern exclusivity. They ditched traditional wealth markers for a strict “not a suit” policy, valuing creative capital over pure cash.<sup>22</sup>

### **The Photography Ban:**

Their most brilliant behavioural nudge? Banning photos in certain areas.<sup>22</sup> In a world where everyone broadcasts everything, forbidding documentation gives the space an instant cultural cachet. The few blurry glimpses that do make it online become high-value social currency. It's organic marketing generated entirely by a restriction.<sup>22</sup>

### **The Digital Walled Garden:**

Members live inside the proprietary app. It's a digital walled garden where they book rooms, manage 'House Pay', and connect with each other based on their physical location.<sup>23</sup> It reinforces the boundary between the insiders and the general public.



Image source: [www.sohohouse.com](http://www.sohohouse.com)

## The Pig Hotels: Lo-Fi Provenance

The Pig completely redefined the English getaway by calling themselves “restaurants with rooms.”<sup>16</sup> Their narrative is unpretentious and entirely rooted in the soil.

### Lo-Fi Paid Social:

Working with digital agencies, they ditched corporate imagery for “lo-fi” content that feels like a friend’s Instagram story.<sup>24</sup> By pairing this authentic storytelling with a highly targeted paid social strategy, they drove a 93% increase in monthly revenue and an 87% year-on-year increase in Return on Ad Spend.<sup>24</sup>

### The 25-Mile Menu:

They don’t aggressively market their bedrooms. They market their gardeners, their local suppliers, and their 25-mile menu.<sup>16</sup> They showcase the process of hospitality (foraging, cooking) rather than the polished final product, proving that authenticity is highly marketable.



Image source [www.sohohouse.com](http://www.sohohouse.com)



## Heckfield Place & Chewton Glen: Wellness meets Hyper-Local Dining

### Heckfield Place:

A billionaire's eco-friendly passion project in Hampshire, this is "Quiet Luxury" at its peak.<sup>25</sup> They brilliantly merge wellness and gastronomy. The "Bothy" spa connects its natural therapies directly to the dining experience, with culinary director Skye Gynge crafting plant-based menus exclusively for spa guests. Outside the spa, the Green Michelin-starred restaurant serves biodynamic, estate-grown produce. It's conscious detail in action.<sup>25</sup>

### Chewton Glen:

This classic Relais & Châteaux property shifted its appeal by building bespoke luxury treehouses in the forest canopy.<sup>26</sup> It provides the radical remoteness of a Maldivian water villa, but in an English forest. They back this up with Europe's largest hydrotherapy pool, CBD spa treatments, and cookery classes at The Kitchen by James Martin.<sup>26</sup>

Image source: [www.heckfieldplace.com](http://www.heckfieldplace.com)





## **The Newt in Somerset: Monetised Access**

The Newt blurs the line between a luxury hotel, a working farm, and a members' club. They don't compare themselves to rural party spots; they align with ultra-luxury fashion houses like Hermès.<sup>28</sup>

### **Monetising the Mystery:**

To even see the estate—the apple tree maze, the Roman villa, the cyder press—you have to buy a membership.<sup>30</sup> By restricting entry, they create a highly profitable psychological anchor. You literally have to buy into the brand just to see what's behind the wall, generating recurring revenue before a hotel room is ever booked.<sup>30</sup>

# The 2026 Playbook

If you want to capture the audience actively bypassing international flights, the old hospitality playbook is dead. Here is what you actually need to be doing in 2026.

## 1. Optimise for the New Gatekeepers

With 64% of shoppers using AI for research, standard SEO isn't enough.<sup>32</sup> You need to structure your digital content so Large Language Models (like ChatGPT or Gemini) can easily read it. Demonstrate E-E-A-T (Experience, Expertise, Authority, Trust) so the AI recommends your "quiet luxury country house" over the competition.<sup>32</sup>

## 3. Navigate the Privacy Paradox

Guests want personalisation but don't trust you with their data.<sup>32</sup> You have to earn it. Offer exclusive content—access to unlisted suites or secret menus—in exchange for their first-party data. Use that data to make them feel known before they arrive.<sup>32</sup>

## 5. The Hidden Value of Charm

AI is great for planning, but discerning guests still crave human connection. There is immense, hidden value in charm and human interaction. Make sure your digital interfaces hand off smoothly to real people. A "Homestay Specialist" or human-serviced LiveChat proves that while your operations are high-tech, your hospitality remains deeply, reassuringly human.<sup>5</sup>

## 2. Verifiable Transparency

People hate greenwashing. In the UK, 54% of consumers say they'd boycott a brand over misleading green claims.<sup>32</sup> Move past generic eco-statements. Show them the exact food miles, the ground source heat pumps, the rewilding projects. The luxury is found entirely in the integrity of the details.

## 4. Audit Your Mystery

**Website:** Use atmospheric photography that hints at the experience. Leave some negative space.

**Email:** Keep subject lines under 15 characters. Open a narrative loop they have to click to close.<sup>18</sup>

**Inventory:** Hold back your top 10% of rooms from the OTAs. Make them unlisted and market them purely through private inquiry.<sup>20</sup>





## The Bottom Line

The UK luxury staycation isn't a fallback; it's a permanent realignment of what affluent consumers want. The Maldives will always have its place for those chasing specific bragging rights, but the sheer convenience, verifiable sustainability, and cultural depth of the British country house are winning serious ground.

To win in 2026, brands need to stop over-sharing and start remembering the psychological power of mystery. Whether it's Soho House's photography bans, The Pig's hyper-local storytelling, or the unlisted suites of the countryside, the future of luxury hospitality isn't about showing the guest everything. It's about making them desire the unseen.

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