



From the Front Line
Luxury Trends Report

December, 2018
By: Jack S. Ezon



EMBARK

beyond travel

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Introduction: *The Banner Year:* Despite cautious optimism, 2018 has been a banner year in the luxury travel industry. Not only are high-net worth clients embracing experiences at any cost, the bar continues to rise on over-the-top travel experiences as once-conceived niceties become necessities. And while retail and real estate occupancy declined, political quagmire continued to plague most of the modern world and climate change knocked places off the map with fear (fires in California, drought in Cape Town, devastating hurricanes in the Caribbean...), rising oil prices seem to inflate rates and trade wars promised to cause uncomfortable relationships with world powers, luxury travel seemed to not only weather through it all but thrive. Business grew 21.3% in 2018 with a pace of over 12% for 2019. Average daily rates are up 15.3% and frequency of high-spending experiences continues to accelerate. International travel continues to make up over 90% of our clients' travel despite world politics and places scarred by terrorism in the past few years are beginning to bounce back (think Istanbul, Egypt, and, well, almost France). Can this continue into 2019? Despite our usual optimism, we reinstate our cautious optimism as the year ends with a stumbling market and many scratching their heads as to when this cycle is going to turn.

It seems there is a new resilience in our client base. Fear did not guide their decisions as strongly as it did in 2016 or 2017. Instead, the general feeling was, *"If I am going to travel, I want it to at least have purpose; I want it to be impactful."* This quest for meaning has morphed into a quest for purpose, self-discovery and self-realization. Amidst all the world's mass confusion and disasters this has become the central theme for the way we now sell and this year's observations – especially for people with a Millennial mindset whose definition of value must be framed in context of meaningful goals.

Value and purpose have been a central theme in the luxury space whether in fashion, travel or any goods or services consumed by a younger mindset. Brands continue to shift from being transactional to being immersive and "experiential." Brands have now, more than ever, shifted to become more storytellers, explaining their value and why it should be meaningful to the buyer. You see, UHNW clients with a millennial mindset may not want to spend \$2,500 a night in a suite for the sake of optics, but they would spend \$4,500 a night in a tented camp where all profits are reinvested in the community to drive conservation. As streetwear begins to overtake dresswear, this shift in marketing speak is finally catching on in every facet of the luxury market.

And with the continued shift from spending on experienced-based services over goods, travel has never been so well positioned for success -- *if done right!* While business is great *in-the-now*, this is no time for any of us to rest on our laurels. On the tech front, consolidation continues to happen, with google and facebook continuing to gain dominance and hold the keys to envious consumer data. Artificial

Intelligence continues to mature and companies are starting to learn the best ways to augment the technology to help them serve clients better rather than replace them. Consolidation on every side of the table will make customer-centric boutique operations more challenging to sustain themselves. Meanwhile, to stay relevant, trends in family travel, celebrations, wellness, art and gastronomy cannot be ignored.

And while much of the trends outlined in last year's report are still very relevant below is my take on what has changed in 2018 and remain relevant in 2019. This year we will examine the amplification of many things that have been trending the past 2-3 years and other emerging trends germinating.

A New Format: In response to many of my readers I am trying a new format this year. Rather than one long, exhaustive document, I will publish this report quarterly, splitting up subjects into shorter, more digestible nuggets. While this may deter from providing a holistic picture of the marketplace I think it may make the information more digestible.

This "issue" will focus on top luxury trends and top destination trends, looking at places we think will thrive in 2019 and exciting new product. Thereafter:

- **Second Quarter** will feature our regional and destination metrics for 2018 and a look into the future of pace for 2019. In addition we will include Market Observations affecting the luxury and the travel market place.
- **Third Quarter** will examine distribution trends and general consumer behavior observations that we think effect the luxury and travel space. We will include more granular travel trends outlining how our clients are traveling and buying travel.
- **Fourth Quarter** - by the end of the year we will reassess Luxury travel trends (specifically) and focus on new product, top destinations and business opportunities for 2020.

That being said, *I would love your candid feedback*, not only on the substance of what I present below but also the new format. I am not convinced this is the best way to format the plethora of content I have to share, so any comments or suggestions you could provide would benefit us all.

Before we Embark... Oh, and on a final note, you will notice a rebrand not only of this report but my company in general. Beginning January 1st I will be launching a new company with several leaders in the luxury travel space called **Embark**. Embark is a new luxury travel and lifestyle brand embracing the power of partnership across luxury influencers and sellers with a structure that will look more like a law firm than a traditional travel agency. Instead of building an independent contractor model, we aim to build a partnership model where forward-thinking travel advisors become partners in the firm. Under the plan all partners will own a piece of the host agency and we will give our employees a chance for a partnership track (giving Millennials a clear career path). We believe this new model will better align our people and enable us to make impactful investment in marketing, training and technology to stay relevant in this dynamic business place. As an affiliate of Ovation it still represents one of Virtuoso's largest affiliate agencies with the strongest focus on Ultra Net-Worth Millennial and Gen X travelers.

With an ear to the ground both from our customers and our close travel partners we are able to closely track trends from the front line. We are delighted to collaborate with you to share detailed metrics and our acute analysis of the luxury travel marketplace whenever you need and remain available to connect you to great sources and discuss emerging issues that often develop into great stories. For now, below is an abridged version of our report's top luxury travel trends.

Jack Ezon



From the Front Line

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I. Top 15 Luxury Trends:

Below is a streamlined version of our top 15 luxury trends I feel are affecting the luxury traveler's world. I break this up into three categories with 5 top trends in each. I start with consumer trends, outlining trends I see with in our clients' personal lives even if unrelated to travel. Next I touch on 5 trends I see in the market place that are affecting our business and lastly focus on 5 travel trends, directly related to travel.

A. Consumer Trends:

1. **Self-Realization: Purpose is the word for 2019.** While buzz words like transformational floated above the tundra in 2017 and 2018 we soon realized it was really about making meaning. You cannot predict nor expect transformation to happen every time you travel. Rather, people bought experiences and used travel as a platform to make meaning in their life. And while this is still happening, we find "meaning" as a driver amplifying into *self-realization*, especially for the UHNW client who top Maslow's Hierarchy of Needs. People are looking for fulfillment in their lives – whether that is connecting to their heritage, furthering their overall wellness, finding a meaningful charity, discovering their true passion points, or even accomplishing something they never thought they could. Fulfillment comes from exploring passions and pursuing dreams. Today's client is much less about where they want to go and what they want to do but who they want to become. The new bucket list is about "what" and "why"; it is about *Self Discovery*. You see, by removing yourself from your routine and taking yourself away from your comfort zone you give yourself an opportunity to discover your inner passions and try things you ordinarily would not. The destination has become the backdrop to discover yourself and create memorable connections between people. Experimenting with new experiences, identifying with different perspectives, and appreciating cultural differences help our clients understand their inner purpose. It helps them test what resonates and what doesn't. Stepping back, whether on a seemingly frivolous beach vacation or a seemingly transformational trek up Mt. Kilimanjaro, gives you the ability to take a true inventory, test your beliefs and adjust your path on an ongoing journey to greatness.

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2. **Holistic Luxury:** We see a strong dichotomy between aspirational HNW individuals who are becoming more transaction-oriented and UHNW who are looking for more personal relationships with people *specializing in them* at every level of their personal life. Addressing this while we have always prided ourselves on consulting clients to put together a meaningful 3-5 year travel schedule touching different milestones, family schedules, and personal goals. Recently our legacy clients have asked us to help them enhance their life beyond just travel, whether it is to suggest gifting, help plan parties, set them up with personal stylists, gain access to world events or concerts, curate art for their new home – or even find them a new home. Luxury clients are

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looking for lifestyle solutions with trusted advisors and not siloed conversations with too many different specialists.

3. **Wellness:** The wellness frenzy continued to accelerate with new wellness philosophies. “Trends of meditation, yoga, and balance are everywhere throughout the hospitality industry” notes Galit Schwartz, industry veteran and passionate entrepreneur in the wellness space. “Of this new thought process we are now seeing the trend of crossover “fitness + lifestyle brands” brands quietly coming into the hotel scene.”

Hotel companies like Hyatt bought into wellness companies like Miraval to accelerate their place at the wellness table. However, it will be the way in which they integrate these programs and their commitment to authentically installing them that will be the tell-tale sign of their long-term success. Take Related Properties as an example. They are taking what seems to be the boldest move in the space by breaking out Equinox Hotels this year. Though their tagline reads “*where the science of fitness meets the art of travel*” the marketing

communication and programming seems to play down the fitness and wellness concept and root itself more of a lifestyle hotel with five-star service. While it seems like an effort to avoid being positioned as a gym with rooms, it’s soft approach dilutes their aim. That may seem irrelevant in the overall marketplace to some, but from our perspective we see it as being quite impactful. You see, our biggest concern is the over-reaching use of the term “Wellness.” With so many brands regurgitating “breakthrough” concepts that are completely confusing clients, 2018 became a tipping point year where clients felt inundated with wellness concepts in travel and skeptical of claims from too many “wannabes”. And while fitness seems to have a clear barometer that is easily measured, the rest of the wellness space is fraught with imposters throwing around jargon that dilutes the impact of real players. In fact, wellness is a serious consumer need and the success in the space will be very much dependent on the credibility of the players and their ability to define their sub-spaces of wellness so that anyone with a massage treatment room won’t be dubbed a “wellness zone”. Some kind of regulation or guideline on different “wellness” concepts and what they mean will go a long way in marketing, identifying clients, and selling wellness and, most importantly, solidify its longevity in the marketplace.

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4. **Approachable Luxury:** The luxury consumer today wants luxury that is approachable rather than stuffy. People want buzz-worthy, socially savvy luxury that is sophisticated and flawless but also doesn’t take itself too seriously. Many luxury brands are seeing this in everything they do. Take the fashion world, where Paolo Zegna, CEO of Ermenegildo Zegna notes that 2018 marked the first year that streetwear overtook dresswear, a trend that is not uncommon amongst the top luxury fashion houses. In the travel world, watch as grand dame mainstays are beginning to break down their tall formal desks, add whimsical elements and replace fussy with fun. Their key will be to balance their tradition and

personality with a fresh approach to service. How to balance traditional (and sometimes too formal) luxury, with a modern-day craving for something more relaxed and approachable is a delicate art.

- 5. Going Micro:** In an age where people are so connected digitally, they realize that they are totally disconnected. They crave micro-moments in their life, especially those outside their comfort zone, to explore their real passions, real purpose in life, -- connecting to themselves while also connecting to the people they are with and the places they go. As the world continues to shrink we see so many things continuing to go micro. We saw this with the success of boutique hotels in the past few decades where personalization won over big-box predictability, but we see the trend for “bigger is not always better” extending into so many other things. People are looking for micro-moments to truly connect to each other. This means following less people on their social media and more micro-influencers whom they truly know and identify with. It also translates into less mega-parties at home and more intimate destination celebrations with the people who really matter. It is quieter, more local trattorias than buzzing mega-plex lounges with food. It also means shortened jaunts, even to distant places, than longer trips blanketing a region. People are also diving deeper, recognizing that less is more. Ten years ago, a typical American would do 4-5 places on a two-week trip. Now they will do 3-4 on average. Going micro also means visiting less iconic cities, brimming from over-tourism and seeking secondary or tertiary cities. And when they go to popular destinations they are looking for the more “local” quieter side of a city to get lost in and explore. It’s no coincidence that going micro helps with self-discovery as it avoids frivolous distractions and truly embraces the growing concept that “*less is more*” as long as that less is truly meaningful. And therein lies the opportunity. We’ve heard terms like “bespoke” and “curation” being tossed around all too much, but consumers truly value the art of a great editor. They want less choices but better choices. You see, our ability to know our client and edit out the “more” to create a really perfect “less” will garner great value in the next few years.

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B. Market Trends:

- 1. Reinventing the Retail Experience:** The luxury retail shops that are surviving are relying primarily on tourists in destinations with great exposure like New York, London, and Paris (despite high rents). But even these stores are reinventing the retail experience to embrace the wave of change. Rather than being focused on transactions they are carrying less inventory and creating more of a museum-like atmosphere to tell their story. Look for pop-up shops in secondary markets and experiences in travel destinations to engage UHNW clients with brands. LVMH’s recent expansion of its *Mainson Particular* is a classic example, where they open their ateliers and factories for qualified visitors. Italian brands have done the same thing with their *Altagamma* initiative bringing qualified clients inside their world. The next phase is immersive trips focused on brands where car companies bring customers to their factory and fashion houses create custom 2-3 day fashion experiences in their country of origin so guests can meet their designers, visit an atelier and become a part of the brand fabric.

2. **Decline in Retail Occupancy:** As a result of the “experience” economy and more robust digital retail options, there has been a drastic decline in retail occupancy. Flagship spaces in destinations like New York and Beverly Hills lie dormant or have seen rents decline by 20-30%. And while the few affected landlords may not immediately affect the economy, the downward spiral is a major concern for the wellness of the economy. When retail declines, wholesale declines, factories decline, jobs decline, and real estate values in general decline. So while we are all enjoy the fruits of this boom, we proceed with cautious optimism.

 3. **The Villa Market Gone Bad (?):** The success of AirBnb’s “sharing economy” phenomenon has spurred many hospitality companies to hedge with related acquisitions. Despite the success of authentic home sharing hubs, hospitality companies seem to fail at making their versions work. Accor took a \$288 write-off for One Fine Stay while Hyatt lost \$22 million for its investment in Oasis. Watch this vertical as hospitality companies try to revisit this hot space. The key, especially from our vantage point, is to be able to scale while maintaining a consistent quality. And we’ve noticed that it has been virtually impossible in the private home space.

 4. **Compromised Hospitality Talent:** As management companies continue to primarily focus on servicing ownership in optimizing real estate value and provide technology and distribution for hotels, there is a growing animosity amongst luxury hospitality leaders. The talent pool of talented general managers, customer relation managers, and marketing leaders is beginning to change – which will have a long-term effect on our entire industry. Many hospitality leaders who set the bar for what consumers line up to pay a major premium for find their jobs changed from being customer-centric to being ownership-centric. And while we are all in a for-profit business, this shift does not spell promise for long-term premiums in the luxury space. More and more GMs are looking for alternate roles or seeking opportunity on the asset-management and development side. Marketing and Sales managers are looking less at their brand positioning and more at their short-term REV-Par and market position in the past month than the long-term trajectory of their Rev-Par. This makes for poor decisions and dilution of price integrity which hurts us all in the long run. I believe this will create seismic change and opportunity in the next five to ten years at every level of the luxury travel industry and a serious trend we need to continue to watch.
- Many hospitality leaders who set the bar for what consumers line up to pay a major premium for find their jobs changed from being customer-centric to being ownership-centric.*
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5. **Mainstream Media Continues to Implode:** The consolidation of Conde Nast Traveler is only the latest example of the continuing demise of mainstream media. It remains a huge threat to our business as an industry. While social media and digital properties grow in influence, these mainstream publications remain the most influential drivers of business and destination requests. The sad part is that most of the destructive forces are made by advertisers and analysts despite the fact that readers still value them. By listening to client requests, we clearly know our clients still value print or digital versions of legacy brands for travel and lifestyle content. Remaining publications are focused on quantity of ‘clicks’ and not quality of reach, which has caused remaining respectable publications to dumb down content or make it more universally approachable, eschewing too much luxury-focused content. And while that may be great for advertiser-focused statistics, it destroys the brand in the long run. You see, luxury trickles down, never up. Once your brand hits Target or Marshalls you cannot easily get it back into Barney’s.

You can appeal to middle-market with luxury dreams, but you won't be able to position it to the real luxury consumer that way. Indeed, luxury lifestyle publications appeal to a much smaller segment of the marketplace but their virtue tangentially appeals to middle-market aspirational (and not vice versa). Advertisers need to see the value in quality versus quantity. In the meantime, clients are overwhelmed with inconsistent and inaccurate information. And while that presents a great opportunity for the travel advisor value proposition as an "information navigator" it frustrates the consumer's appetite for inspiring travel content and misguides many into false expectations. The luxury travel world needs trusted brands to remain intact to drive business. Meanwhile, as niche brands like "Afar" seem to be growing in trusted popularity the overload of websites in the "content" business seem to have limited impact on business.

C. Travel Trends:

- 1. Taking the Party on the Road: Destination Celebrations** – UHNW clients are continuing to take their parties on the road with unprecedented spending. Destination Celebrations grew a whopping 275% in 2018 with another 130% growth already closed for 2019. Not only are we doing more celebrations, but the budgets and details are exponentially growing in extravagance. And for the first time, weddings accounting for under 50% of the celebrations we produce. That is a stunning revelation for the marketplace to embrace milestone events beyond nuptials. In fact, often time we plan celebrations and back into a reason for them: like random birthday parties, anniversaries, or even chartering a cruise ship for a college send-off. The Multi-Gen market, which needs to be treated almost like a mini-destination event, has been growing for over a decade – but recently its breadth and spend have reached levels of what a typical wedding might cost. From first-hand experience I can attest that big box hotels, especially in the Americas (much more than their international counterparts) are most unprepared to embrace this shift. Social events are monitored by catering managers in many American hotels -- and not DOSMs or GMs who need to be making smarter decisions and seize strategic opportunities in this growing market. These multi-million events get lost between transient and MICE and leave tremendous revenue on the table, ignoring a growing and extremely profitable segment.

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- 2. Quinquagenarian Revelers** – as Gen-Exers push 50, they live and travel very different than their Baby Boomer parents did. Not only are they more active, but they party like it is still 1999. Gen-exers are determined to age backwards, and in addition to a heavily focused wellness and fitness regime they are flocking to international clubbing destinations more than ever. Ibiza and Mykonos took the lead in 2018 with \$20,000 + tables on the dance floor are *de rigueur*. Sardinia, St. Tropez, and even Bodrum topped destinations this year with revelry being a primary driver. Reveling is not for the cheap backpackers anymore. Take heed of this amazing opportunity.

3. **Art:** Art continues to go mainstream. This year the venerable Wirth family opens **Fife Arms** in the Scottish Highlands, joining **Villa Lacoste** and a handful of other boutique resorts that are virtual art galleries for their owners. These are not only in a stunning setting but they also have rooms for a select lucky few to experience the private art collection of the owners. **Le Maison des Arles** joins the scene of art focused hotels in 2019 in anticipation of the Frank Ghery's Luma Arles in the Parc des Ateliers opening next year, setting this once industrial town up to become the Bilbao of France. Even the **Faena Miami** brought Art Basel Miami mainstream with its own festival of arts for the public to enjoy during this elite event in December. Art is continuing to drive destination business and will continue to be an impactful impetus for clients just as food and wellness have in the past 5 years.

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4. **The Dominance of the Independent:** *David v Goliath* – this year our business to independent hotels continued to exceed that to chain hotels. Bespoke, fabulous, mostly family-run luxury hotels are what clients seek most. As brands consolidate or grow, their value proposition and consistency in delivery is diluted. Clients at the top level see behemoths like Accor and Marriot as too impersonal and generic (despite some of their brands having truly fabulous sense of place). Further, real luxury travelers, are not motivated by points. Rather they seek out (1) ‘the best option in a destination [for them] (and not by brand!) and (2) the ones that feel most local with a sense of place. Independents are best positioned to stand out and have been succeeding in gaining significant market share in this space.
5. **Comebacks on the Radar:** Look out for Caribbean, France, Turkey, Egypt. Business is up in each reason.
- Caribbean islands have very strong advanced bookings despite many people believing they are still in total despair. Excitement abound by UHNW's missing their annual pilgrimage to St. Barts or Anguilla especially. There is still too much confusion on the actual situation on islands like St. Martin and Puerto Rico causing slower growth.
 - France on the other hand has been slowly but steadily growing, with business spanning throughout the country. Whereas historically 80% of the business to France stayed in Paris and the Cote D'Azur, those two locales are now just under 50% with other regions like Bordeaux, Burgundy, French Basque and Provence making up a sizeable portion of the rest. Paris looked exceptionally promising for 2019 however, the violent protests late in the year created a tremendous setback and onslaught of cancellations.
 - Turkey and Egypt have grown in single digits which is a substantial gain relative to their dormancy in the past 3-5 years.

II. Top 20 Destinations of 2019:

Below are our predictions for 2019's top destinations and why.

- 1. The Caribbean:** There is no question the Caribbean is on a Comeback! In fact it is the #1 destination we are booking this season. Our clients are longing to be reconnected to the beautiful soul and warm personalities that the Caribbean delivers. Historically 53% of our Northeast client base make at least one annual pilgrimage to this region. This year it looks like at least 62% will. With hallmark islands like **St. Barts, Anguilla, Puerto Rico** and **Turks and Caicos** all coming back online for 2019, clients know there is no better time than this year to have their pick of the freshest product the region has ever seen. Every room at every luxury hotel in St. Barts and Anguilla will be totally brand new. Restaurants are ready to swing open their doors and shops have all been restored. Other islands are not resting in their laurels either. **Mandarin Oriental Pink Sands** finally brings glamor back to the private island of **Canouan**, while a completely reinvented **Half Moon** reopens in Montego Bay, with a fully polished experience that is said to take Jamaica prime time. Speaking of prime time, two sleepy islands get their first luxury resort anchor opening them up to the international jet-setting scene. **Silversands**, a sexy beachfront resort is the first of its kind in Grenada while **Cabrits Resort Kempinski Dominica** will be a new beachfront basecamp for eco-tourists looking to fuse sun, sand and a host of adventure activities like rappelling down a waterfall or mountain biking down through a rain forest.
- 2. France:** After more than 4 years of struggling following a series of terrorist attacks, France was finally bouncing back. In 2018 Paris grew 48% though it was still 37% behind pace of 2014. The South of France and Provence were up a steady 21% having suffered a bit less than the capital city. Riots in November and December quickly curtailed any progress the city made in bookings, with 82.4% of our bookings to Paris canceling for travel within the following 60 days. However, on a promising note, only 39.4% of our reservations after February canceled. However, reservations outside of Paris continued strong, with only 9% cancelations. This seems to indicate a resilience to the issues facing the country and an overwhelming yearning to return this elegant country. Our clients are most excited about **JK Paris**, which opens in the 7th opposite the Museum d'Orsay – an exciting Left Bank alternative to the B&B style inns peppering its cobblestone streets. Newly renovated grand dames such as the **Martinez** in Cannes and the **Hotel de Paris** in Monte Carlo are certainly adding to the buzz, while St. Tropez awaits new digs with great anticipation, most notably LVMH's unveiling of **Residence La Pinede** while Courchevel icon L'Airelles Group starts its re-do of **Chateau de la Messardiere**. The same group opens one of the most anticipating hotels in Europe which will no doubt become the honeymoon hotspot of 2019 ... **The Grand Hotel d Chateau d' Versailles** which will house 15 suites in the actual Chateau. For those that love the hot trend of cool wine resorts, the industrial-chic **Hotel Chais Monnet** will redefine Cognac, **L'Maison des Arles** sets what will soon be France's hottest art city up for success, and **Le Massif** brings a dose of modernism to the traditional Courmayeur in Mt. Blanc. All this fuss spells opportunity for a county that is so elegant and the world source for *joi de vive* that truly needs its own comeback, despite recent setbacks.
- 3. Greece:** Greece continues to entice our clients and 2019 looks like it will continue to lead in Europe. In 2017 Greece has grown 173% and it grew another 45% last year surpassing every country on the Mediterranean except Italy. With all quiet on the Greco-front, people are flocking back to its magnetic waterfronts and incredible nightlife. Mykonos leads in popularity while Santorini comes in a close second. We expect the new **Four Seasons Astir Palace** to rejuvenate the mainland and create new interest in Athens and its surrounding beachfront suburbs, especially for celebrations.

4. **Cuba:** Despite the setback that President Trump created by tightening access to Cuba, the country is bouncing back as a tourist destination – and even better than before. Having suffered from a sudden spout of over-tourism, Cuba is now more modest in its approach and welcoming to American Tourists. With the fabulous **Kempinski Grand Hotel Manzana** and the new **So Havana** opening, affluent travelers finally have a world-class place to stay while exploring the fascinating lifestyle and decaying grandeur of Havana and its surroundings.

5. **Italy:** The love affair between Americans and the beautiful Italian *dolce vita* keeps Italy in its still coveted number one spot and consistently dominates in every category! This year seems to be no different. In fact, we are seeing our clients reinventing their Italian experiences, spreading far outside the iconic cities and even the iconic resorts. Annual pilgrimages to the Amalfi Coast are now coupled with explorations through Umbria, Puglia and the Dolomites, the latter becoming a booming summer adventure and hiking haven. Even wellness spa **Lefay** is opening there, joining the acclaimed **Hotel Rosa Alpina** and a host of small, family run hiking [ski] resorts dotting the majestic granite mountain range. Foodies are going wild over the opening of Massimo Bottura's **Villa Manodori**, his 12 room villa cum-gastro-haven in Modena, purpose built as a refuge for gastronomes visiting this foodie capital of Italy.

6. **Ireland & Scotland:** Out of the darkness, Ireland and Scotland both catapulted 20.5% this year, mostly attributed to press exposure of fabulous new products like Ashford Castle, Adare Manor and great new attractions like the new McCallan's Experience or the uber-luxe Belmond Grand Hibernian Train (which is the first of its kind on the island). What's also interesting is that while historically golf was a primary driver to these destinations, over 85% of our trips to the region focused on either recreation and active exploring (like hiking or biking) or whiskey. More than 45% of the experiences to the region were multi-generational or individual families. People love that Ireland and Scotland are both off the grid and have some of the friendliest, warmest and endearing locals in the world.

7. **Rwanda:** Rwanda is ready for its close up. After years of turmoil a new government has not only brought stability but progress and reform as noted in the cool capital of Kigali. There has never been a more luxe way to go gorilla trekking. This comeback country continues to see growing demand. It doesn't hurt that luxury conservation pioneer Singita will be opening **Singita Kwitonda** this summer. The minute, 9 room lodge will be the only hotel adjacent to Volcanoes National Park, saving people at least 1 driving to the park. Singita joins the new **Bisate Lodge** and **One&Only's** soon to debut **Gorilla's Nest** as a luxury haven in the country. Outside of the park, One & Only will also open **Nyungwe House** as a gateway to Nyungwe Forest National Park (the oldest on the planet)– famous for its chimpanzees.

8. **Australia:** The South Pacific has been vying with South Africa as our top long-distance destination in 2018 and continues its growth in 2019. What's fascinating is that 32% of first timers to Australia went to South Africa already and want another exciting far-flung destination that fuses a cosmopolitan destination with nature, winelands, wildlife and the sea. It remains a top honeymoon destination for our clients and has grown 26.5% with our family market. Luxury boutique resorts like **Southern Ocean Lodge**, **One & Only Wolfgang Valley**, **Jackalope**, and **Saffire Freyhenet** have literally uplifted the country in the affluent market place. not only entice dreams with stunning imagery but also finally bring the county on par with destinations like New Zealand, Africa and Chile where luxury base lodges draw explorers of a broad age group.

9. **Iceland:** As the glaciers melt in nearby Greenland, UHNW clients are clamoring to stay at one of the boutique luxe-esque lodges like **Deplar Farms** and the **Retreat at the Blue Lagoon** now peppering the Icelandic landscape. Adventurers, explorers, photographers and nature lovers are finding this unique haven an ideal quick getaway.

10. **Portugal:** The oft forgotten country heats up following a growth year as people look for “off the grid” experiences in Europe. Incredible value and great new hotels opening up the coastal regions and wine lands make Portugal the next big thing. Resorts in destinations like Comporta draw visitors outside of Lisbon and the Doro Valley to explore this beautiful country.
11. **Scandinavia:** Intrepid travelers are exploring the Fjord havens of Norway, Sweden, the Lapland, and cosmopolitan capitals of Scandinavian for food, fashion, and under-the-radar vibe. Once relegated to hostels or guest houses, clients can now explore the spectacular region with a completely upgraded experience. This year alone brings fabulous new properties like the **Arctic Bath** hotel in Sweden while cities like Oslo get a fresh redo of its grand dame the **Hotel Continental** and a fully restored **Britannia** in Trondheim, Norway -- gateway to the Fjords. Copenhagen and Stockholm have continued to soar as “cool capitals” for foodies, design aficionados and night time revelers.
12. **Cambodia and Beyond:** Once a 1 ½ day bucket list stopover, Cambodia has become a destination in its own right beyond Angkor Wat. Clients are exploring the backwaters along the Mekong with luxury ships like the **Aqua Mekong**, and spending time learning about the riveting history in Phnom Penh with the **Raffles Hotel Le Royal** and new **Rosewood Phnom Penh** standing as comfortable western homes. **Song Saa** has matured and now attracts adventurers looking for a sexy reprieve from exploring. The greatly anticipated **Shinta Mani** promises to be a true game-changer. Located in the remote Cambodian countryside, it gives guests a chance to explore remote (non-Westernized) local villages through a host of recreational activities with incredible luxury tents to come home to at the end of a day.
13. **Namibia:** The stark deserts of Namibia has seen renewed interest, especially with fabulous new resorts opening up a circuit of opportunities to explore the country. Most exciting is **Shipwreck Lodge**, a series of 10 stand-alone mock shipwrecks housing beautiful, contemporary accommodations. Not only is it fabulous from a design perspective but it is the first luxury basecamp to explore the Skeleton Coast. Joining it is **Hoanib Skeleton Coast Camp**, a perfect combination for a desert and sea experience. Long-time favorite **Sossuvlei** and **Serra Cafema**, on the Keune River offer completely different landscapes and cultural immersions for a full blanketing of the mysterious country.
14. **Chile:** In line with travelers looking for active vacations with beautiful natural surroundings, Chile continues to grow as a top destination. **Patagonia** and **Atacama** have been a mainstay for several years, but only recently are clients spending time in other areas. The winelands had a boost when the dramatic **Vina Vik** opened its doors several years ago and seems to be getting more interest this year as the futuristic glass-houses of **Vik Pureo** open just above. Outside of Torres Del Paines National Park, **Mari Mari** is a spectacular new waterfront resort with a completely different set of experiences en route to the park, while **&Beyond** opens its first resort in South America with **&Beyond Vira Vira** in the mostly unchartered Chilean Lake District. With so many options to explore so many varying landscapes people are choosing an immersive Chilean expedition or seeking to return to a place they thought they checked off their list.
15. **Israel:** Israel is finally going prime time, beyond the Bar Mitzvah herds and tour bus groups. Iconic brands bring serious sophistication to this fascinating country. Tel Aviv has become a cool capital of the world over the past 5 years with fantastic food, incredible nightlife, and a unique *joie de vivre* lifestyle. Joining the game-changing **Ritz Carlton**, **Setai** and **Norman** in Tel Aviv the **Jaffa**, an ocean front resort by Marriott’s Luxury Collection open on the cusp of buzzing Tel Aviv in the artist laden, charming cobblestone alleyways of Jaffa. **Six Senses Shahrut** brings visitors to recreational adventures deep in the Negev Desert just outside of Eilat. **Setai** has opened up the Sea of Galilee in

the country's north abutting the Syrian border. Jerusalem has seen a recent renaissance as well with the opening of the **Waldorf Astoria**, the **Orient** and complete redo of the **David Citadel**. Whether you are going to party, sit in the sun, explore ancient cultures, partake in a host of adventure activities or just enjoy a cosmopolitan city, Israel seems to be drawing people from all walks of life

16. **The Alps and Dolomites:** With the unpredictable snowfall in the Rockies the past 4 years, many clients are shifting their ski trips to the Alps which offers a host of new, less pretentious ski lodges and easy access from the states (especially the East Coast). European ski vacations have been up 20-25% year-over-year in the past 3 years. Top destinations include Courchevel, Gstaad, St. Moritz and the Cortina (Dolomite) region.
17. **Costa Rica:** This year Costa Rica goes Safari with 2 new luxury tented experiences, the first of their kind in Costa Rica. First to open will be **Nayara Tented Camp**, adjacent to acclaimed Nayara Springs resort. Each of the 18 pimped out luxury tents will have an en-suite bathroom, outdoor shower, and even plunge pool filled from nearby hot springs. One month later, **Kasiya** is opening on the swanky Papagayo Peninsula with 10 glamping-worthy tents and is a takeover tent/luxury camping experience. In between roasting Marshmallows, you can hike a rain forest, run across a maze of suspended bridges in a cloud forest, mountain bike amongst monkeys and exotic birds, bath in hot springs or climb a volcano.
18. **Spain:** The Spanish Coast and Spanish Islands beat out France for the first time in 2017, dipped a bit in 2018 but look significantly stronger for 2019. Ibiza and Marbella were still number one in the country for our clients. Ibiza's new slew of luxury hotels showcase how the destination is maturing with its once party-going adolescents. All grown up, haunts like Cipriani and Nobu serve yachting billionaires while new hotels like the **Seven Pines**, **Ibiza Bay** and **Nobu Ibiza** have all raised the bar for table-service focused clients looking to party until dawn amongst the latest DJ culture. The 10-year old **Finca Cortesin** has helped reposition the Andalucian coast, revitalizing grand dames like the **Marbella Club** and its trendier sister hotel **Puerta Romano** (which just transformed one of its wings into a **Nobu Hotel**). Madrid and Andalucia were top cultural destinations with the Basque region coming in just behind. Barcelona and the surrounding region of Catalonia seemed to suffer a bit last year and looks the same for this year with many of our clients concerned about possible unrest related to succession plans.
19. **Africa:** Africa continues to grow by double digits. What was once an outlandish explorer's journey has become mainstream with people returning to more remote areas like East Africa and Rwanda. South Africa still takes the lead with almost 80% of our Southern and Eastern Africa business. We attribute this to the combination of good infrastructure, clean cities, easier access, and the plethora of varied experiences within close proximity. Cape Town serves as the hub for 93.5% of our South African experiences. And while people go dreaming of safari, Cape Town always seems to exceed expectations. New hotels like the **Silo** have drawn art and design enthusiasts to a burgeoning art scene, least to mention the opening of the incredible MOCCA Zeitz Museum. The city has marked its place as a foodie capital and its value to the US dollar has made it almost too good to pass up. The development of luxury options in the elegant winelands, added adventures in the Cape and beach options in Hermanus have created demand for longer itineraries in the country.
20. **Yachting:** Charters for private yachts this past year leaped 29% this year, with the average charter costing \$214,733 this year. Charters were most popular in the Mediterranean and Caribbean. We are seeing clients who had done the "villa thing" upgrade to yachting and just become addicted to concept.

III. Top 30 Hot Hotels Opening in 2019

Below are the hotel openings for 2019 which we are most excited about:

- 1) **Singita Kwitonda, Rwanda:** Though only 8 rooms, Singita's entry into Rwanda will catapult the already burgeoning country onto the main stage of luxury destinations. While most lodges are an hour-plus away from Volcanos National Park, Singita Kwintonda is a mere low stone wall separating it from the park. That means earlier and easier exclusive access to get up close to the gorillas. In total Singita style, no comfort will be overlooked and you can expect a major focus on food and wine. (August 2019).
- 2) **Villa Manodori, Modena, Italy:** Three-star chef Massimo Bottura opens this 12-room sanctuary for gastrophiles easing the pilgrimage to his famous Osteria Francesca in Modena, a region starving for luxury haunts. Set to open in January, 2019, this "little country bed and breakfast" is about 15 kilometers outside of Modena, set in astonishingly beautiful gardens, giving guests an opportunity to experience more than a transformational dinner at this iconic food Mecca.
- 3) **JK Paris, Paris France:** JK brings the first ultra-luxury boutique hotel to Paris' left bank. Located in the fabulous 7th Arrondissement, Michael Bonan's 30 sumptuous designed rooms take this coveted area of Paris to another level, literally across from place de la Concorde, next to Musee D'Osay on the corner with Saint Germain, set in a former embassy. Think Italian chic fused with Paris elegance. (Spring, 2019)
- 4) **The Grand Hotel d Chateau d' Versailles, France:** The famous L'Airelles Courchevel gives us bourgeois a chance to live like a noble in a game-changing resort situated in three wings of the actual Chateau at Versailles. With just 15 rooms the hotel faces the L'Orangerie with an Alain Ducasse restaurant to descend to when hunger calls. Imagine the chateau virtually to yourself? Opening Summer 2019.
- 5) **One&Only Desaru Coast, Malaysia:** Just a two-hour drive from Singapore lies the Desaru Coast, one of the most beautiful beaches in Southeast Asia where One&Only finally bring luxury to the region. With just 42 suites plus an exclusive four-bedroom villa on one of Malaysia's most beautiful beaches this is a perfect extension to a business trip or exploration of the wonders of Asia. (Opening spring 2019).
- 6) **Heckfield Place, Hampshire, UK:** Located in Hampshire, about 35 mins from Heathrow, Heckfield will be a fabulous countryside resort where guests are encouraged to forage for dinner ingredients and participate in the working farm and even work alongside chefs to prepare dinner. (January, 2019)
- 7) **The Jaffa, Tel Aviv, Israel:** Tel Aviv goes prime time with the opening of the first Luxury Collection Hotel in the country. Located in the old town of Jaffa, it is the only luxury oceanfront hotel within walking distance to the neighborhoods fabulous art galleries, acclaimed restaurants, buzzing bars and club. No doubt it will be a *Game Changer* for the city. (February, 2019)
- 8) **Rosewood Miramar Beach, Monticeto Santa Barbara:** Brainchild of retail impresario Robert Caruso, the new Rosewood Miramar Beach will be the first luxury beachfront resort in Santa Barbara

with just 161 beach inspired suit and bungalows sprawled across 16 coveted acres leading to the private Miramar Beach Club. (March, 2019)

- 9) **Auberge Blue Sky, Park City, Utah:** Set outside of Salt Lake City's pristine mountains, Blue Sky will be a game changer in offering a luxury ranch and tented camp experience within easy reach of a hub city. Its luxury yurts will be among the largest glamping options in the country while its bespoke approach to outdoor adventures, led by ex-Aman visionary Stuart Campbell, will redefine the way people explore the American West. Guests will have exclusive access to heli-skiing landing directly at Blue Sky for incredibly private off-piste adventures with over 1 million acres of private back-country skiing within a 10 minute flight. (May, 2019)
- 10) **Silversands, Grenada:** The island's first luxury resort boasts 5 private beachfront villas with private infinity pools all done up with a chic, whimsical style. Other guests will enjoy oversized suites (the smallest is over 700 sft!) with organic woods and earth-toned marble accents, most framing shimmering turquoise views. At the center of the resort is a football-field size infinity pool lined with cabanas, swings and slick lounge furniture. (January 2019)
- 11) **Fife Arms, Scotland:** Fife Arms brings the first world-class luxury resort to the Scottish Highlands and will certainly draw a new set of jetsetters to Scotland. Launched by art power-couple Iwan and Manuela Wirth, this 46 room mansion will double as an art gallery and a platform to explore the spectacular Scottish Highlands' for its endless hiking and boutique distilleries. This former hunting lodge of the Duke of Fife was designed by Russell Sage and is a true museum-level art experience. (March, 2019)
- 12) **L'Arlatan, Arles, France:** Another art focused hotel hits the hotel scene this year. Designed by Jorge Pardo, this small hotel is a work of art in itself. With 35 rooms, each corner is infused with contemporary designs. Meant to be a new base camp for art lovers as Arles transforms into the Bilbao or the Provence, this "Maison" swings its doors ajar in anticipation of next year's opening of the Frank Gehry designed Luma Arles Tower art museum. (January, 2019)
- 13) **Islas Secas, Panama:** This new private island resort in Panama is the first of its kind, bringing exclusive eco-adventure opportunities for explorers looking for unique marine adventures in a virtually untouched 16-island archipelago, shared with up to 13 other guests, bringing a new level of experience to the country's beautiful coastline. (9 bedrooms in 4 accommodations, 90 min charter from Panama city/45 min boat ride from David).
- 14) **Nayara Tented Camp, Costa Rica:** Costa Rica's acclaimed Nayara Spring's opens the country's first glamping experience with 18 luxury tents each with an en-suite bathroom, outdoor shower, and plunge pool filled from nearby hot springs. Ideal for families, many of the tents even have an option to connect. And when you are done exploring the jungle the camp's swim-up bar and family-friendly pool are an ideal place to refresh.
- 15) **Kasiya, Papagayo, Costa Rica:** Following the footsteps of Nayara, Kasiya opens quietly in 2019 with 5 luxury tents and expects to open with 5 more overlooking the dramatic coastline of the Papagayo Peninsula, offering a more eco-focused experience from the Four Seasons and Andaz sharing the same breathtaking plot of land.

- 16) **Lefay Dolomiti, Dolomites, Italy:** The sleek Lefay spa retreat on Lake Garda debuts an 84 suite sister hotel in the heart of the Dolomites just outside Pinzolo's Modonna di Compiglio ski resort. With contemporary-styles suites starting at 575 sft and a whopping 50,000 sft spa, Lefay offers a fabulous option for ski enthusiasts traveling with wellness-focused companions. Summertime promises endless fitness experiences such as hiking, mountain biking and climbing.
- 17) **Mari Mari, Puetro Mott, Chile:** Located on a breathtaking stretch of coastline in Chilean Patagonia, just south of Puerto Mott, Mari Mari Natural Reserve is set in a spectacular natural paradise for explorations by land and at sea making a perfect combination for guests trekking to Torres Del Paines National Park just 4 hours away. Explore by bike, boat, foot or helicopter with resident guides are on-hand. Though it features just six private oceanfront villas the lodge will have a spacious dining room, bar and culinary experience that celebrates of the region's indigenous ingredients
- 18) **&Beyond Vira Vira, Chile:** Famed safari experience provider &Beyond opens its first lodge outside of Africa with Vira Vira. Located in the breathtaking Chilean Lake District, the property caters to adventurers and explorers with opportunities to hike a volcano, ski, go horseback riding, fish, or take up a scenic helicopter ride. There's even a children's adventure program to get the littlest travelers in your group involved.
- 19) **Shipwreck Lodge, Namibia:** The first Luxury basecamp to explore Nabibia's famed Skeleton Coast, Shipwreck has just 10 rooms - each among the coolest in the world. Every stand alone accommodation resembles an individual shipwreck, right on the sand, guests have access to an untouched, raw and remote part of the continent with towering sand dunes peppered with debris from shipwrecks, whale bones and the remarkable Clay Castles. (January 2019)
- 20) **Arctic Bath Hotel, Sweden:** The first wellness base in Sweden's Arctic region with just 6 rooms each set in its own pavilion built to look like it is floating on the Lule River. When not immersing in the restorative ice-cold baths, it is an ideal place to catch the Northern Lights with miles of untouched beautiful in every direction. (January 2019)
- 21) **Shtinta Mani, Cambodia:** Think Cambodia beyond Angkor Wat or Phnom Phenh. This uber-luxe eco-resort will have 16 tents that will redefine glamping, giving luxury clients a basecamp to explore the more authentic Cambodian countryside. Guests can explore with fabulous biking opportunities, hiking past deserted waterfalls, zip lining, and kayaking along a riverfront that has nary seen a Western visitor. (January 2019)
- 22) **Six Senses Shaharut:** Just outside of Eilat, this will be one of the hottest properties in Israel in a gorgeous dessert setting with an amazing Spa adjacent to a local Kibbutz where guests can partake in making cheese and wine. (March, 2019)
- 23) **Rosewood Hong Kong:** Tony Chi's latest masterpiece, the Rosewood Hong Kong will be the new darling of Kowloon, trumping any existing view. The stunning 413 guest rooms will be located on 43 floors of the Rosewood Hotel Company's flagship 65-story tower located in the new Victoria Dockside arts and culture district at a prime harbor-front location at the former New World Centre on Salisbury Road in Tsim Sha Tsui. Look out China!
- 24) **Six Senses Bhutan:** Six Senses opens 5 boutique adventure lodges in Bhutan joining the venerable Amankora lodges and forging the way for luxury explorers to experience this unique country, set with a focus on wellness and sexy design. (winter 2019)

- 25) **Hotel Chais Monnet, Cognac France:** Bordered by the Charente River and framed by acres of vineyards, Hotel Chais Monnet fuses innovative uber-modern, industrial design with rich history for a unique study in sophisticated classicism with rustic accents. Surrounded by the legendary producers of some of the world's finest Cognacs, the hotel offers guests one of the only luxury base camps for exploring a region rich with wine and gastronomy experiences. (January 2019)
- 26) **Equinox, Hudson Yards New York:** Not only does this hotel represent the first hotel opening in the greatly anticipated Hudson Yards project but also the first foray of Equinox into the hotel space. The sleek new build promises to fuse lifestyle and luxury (Think Four Seasons meets Ace Hotel) with a strong dose of wellness, including a 60,000 sft Equinox gym complimentary for guests, a slick new Soul Cycle and 15,000 sft spa. Guests can have their gym clothes cleaned daily with compliments of the house and have their personal training profile follow them at any Equinox hotel or gym around the world. (June, 2019)
- 27) **Belmond Cadogan, London** - After four years and almost \$50 million in renovations, the former haunt of Oscar Wilde will reopen in January, as one of the freshest and sexiest hotels in London – preserving many of the hotel's original details from the 1800's including wood paneling and stained glass windows fused with contemporary touches and bright interiors.
- 28) **Cabrits Resort Kempinski Dominica:** Look for the new Kempinski to redefine luxury on the sleepy island of Dominica. Surrounded by the Cabrits National Park, home to 365 rivers, waterfalls and pristine hot springs, the Kempinski will offer guests eco-tourism activities with world-class accommodations in a beautiful beach setting. (Spring, 2019)
- 29) **Al Bait Sharjah, UAE, Sharjah** - The tiny Emirati of Sharjah, located just 10 miles from Dubai, goes prime time with its first luxury resort that is the centerpiece of an Emirati conservation project with rooms, restaurants, spa, and wellness facility are incorporated into heritage buildings that are more than a century old, giving guests a chance to explore beyond the ostentation.
- 30) **One & Only Nyungwe House & One & Only Gorilla's Nest, Rwanda** – - One&Only Nyungwe House & One&Only Gorilla's Nest, Rwanda –One&Only Resorts will pave the way for travelers to experience Rwanda and all its natural wonders in true luxury. The 22 room One&Only Nyungwe House opens on the grounds of lush working tea plantation on the footsteps of the ancient Nyungwe Forest National Park (the oldest on the planet)– famous for its chimpanzees. It is a perfect combination with One&Only Gorilla's Nest which debuts on the foothills of the acclaimed Virunga Volcano range where guests will have the opportunity to encounter one of the rarest wildlife experiences in the world (which only a few thousand people a year have access to) – interacting with Gorillas in their native habitat.

Incredible Makeovers:

- 1) **Belmond Cap Juluca, Anguilla** – As subjective as it may sound, most visitors who have ever had the privilege of experiencing Cap Juluca will agree that it is the most magical and magnificent beach in the world. Period. Stop. End of story. In its heyday, “Cap J” (as it was fondly referred) was the most coveted place to stay in the Caribbean. It was where the biggest M&A deals were struck over the holiday season. It was the place to hideaway but be seen. A honeymooner’s dream. And yet, following years of legal turmoil after 9/11, the beloved property fell into such disrepair that just 4 years ago you couldn’t pay people to stay here. You would come for the beach and tolerate the living conditions (at best). Fast forward January 2019, after over a \$120 million investment by Belmond, Cap Juluca finally emerges to its former glory and then some. Newly done rooms remain true to its sexy, understated elegant style. Bathrooms still feature dreamy solariums while every modern amenity you wish for quietly tucked out of site so that the main focus remains the baby-powder white sand and sparkling azure sea. New pools and restaurants grace the show-stopping beach and even kids are welcomed. Expect Anguilla to be the comeback-kid of the year as guest return spellbound by the most incredible beach experience in the world.
- 2) **Cheval Blanc La Pinede, St. Tropez:** This Front-and-center iconic resort in St. Tropez will be transformed into a Cheval Blanc come summer, 2019 and certainly be the place to see and be seen in this glamorous seaside playground. Redone rooms and public spaces will be fitted with to-die-for LVMH accoutrements at the level of sister Cheval Blanc resorts. Why: The only Luxury hotel in the hear of town and on the water. (Spring, 2019)
- 3) **Monkey Island Estate, Bray On Thames, England** – the once iconic Monkey Island Estate returns to London after years in disrepair, as one of the greatest retreats on the River Thames just outside London. The island, with an intriguing history dating back 800 years, has been the haunt of monarchs, aristocrats and artists, along with writers, famous performers and Berkshire locals. (February, 2019)
- 4) **Raffles Hotel, Singapore**– the legendary Raffles Singapore (originally built in 1887) reopens its doors after a 3 year extensive renovation heralding back Singapore’s glamorous Imperial age. With a whole new shopping and culinary experience, reimagined rooms that embrace the past and present and a commitment to preserving the Raffle’s elegant sense of arrival, there’s never been a better time to try a Singapore Sling where it was invented. (Spring, 2019)
- 5) **Four Seasons Astir Palace** – Following a €100 million reinvention, the Astir Palace transforms into *the* hot new spot on the Athenian Riviera. Just 45 minutes from downtown Athens, this urban resort gives guests the ability to explore the ancient relics of Greece’s capital while retreating to a sandy resort to avoid the heat of the city in summer. No doubt this will become one of the hottest spaces to hold the next celebrity wedding and host guests seeking cultural exploration fused with sun and sand. (Spring, 2019)
- 6) **Half Moon Jamaica:** Reopening after an \$80 million redo, the new Half Moon builds a brand new reception and arrival area, reimagined rooms, a slew of modern amenities, and an extensive new infrastructure to enhance the plethora of activities including an equestrian center and two world class golf resorts. (Winter, 2019)

- 7) **Hotel Continental, Oslo, Norway:** Almost 2 years in the making, Oslo's grand dame is ready for its closeup in 2019. Look out for refreshed public spaces including the lobby lounge and Bar Boman and a total remodeling of its 153 guest rooms. (Winter, 2019)
- 8) **Hôtel de Paris, Monte Carlo:** The iconic Hotel de Paris fully reopens its doors after a 4 year project to reimagine the traditional grand dame of Monaco into a relevant and forward thinking hotel of tomorrow. Each of the 100 guest accommodations have been completely renovated with a more Contemporary feel while a new version of Alain Ducasse offers a Contemporary version of this classical mainstay. (Spring, 2019)
- 9) **Britannia Hotel, Trondheim, Norway:** Since 1870, the Britannia has served as the hub of Trondheim -- launchpad for arctic explorers. Following a three-year, nearly \$150 million top-to-toe renovation, the fjord-side city's grand dame will relaunch in 2019, ready for the next generation of regulars. Newly brightened guest rooms feature individually handpicked furnishings and textiles with marble bathrooms. (Spring, 2019)
- 10) **The St. Regis Venice San Marco:** the iconic Europa & Regina has been shut down for almost 2 years for an extensive renovation to transform it into a fresh new St. Regis, complete with modern amenities like a spa and expansive bar – all overlooking the bustle of the Grand Canal and just steps from St. Marco. (Spring, 2019)

Honorable Mentions:

- **Posada José Ignacio** – the Vik family introduces a new concept spun-off of their uber-luxe Vik hotels with the Posada José Ignacio giving young professionals a good well priced choice within walking distance to the beaches and village of José Ignacio. Comprised of six buildings, Posada José Ignacio offers guests well-priced communal style and private accommodations as well as lively co-working spaces that embrace creativity, striking natural surroundings, environmentally minded practices, modern design and an organic aesthetic blending Scandinavian influences with Italian technology and renewable materials.
- **Vik Puroo Chile** - Tucked in the steep hills just below the iconic Vina Vik wine resort outside of Santiago, Vik Puroo is a collection of 19 glass houses with breathtaking views overlooking the Chilean winelands and the dramatic Millahue Valley. (Spring 2019)
- **Le Massif, Courmayeur:** Situated on the slopes of Mont Blanc, near the Via Roma shopping area in the center of Courmayeur, the eco-friendly Le Massif offers guests a unique modern-Alpine aesthetic with spectacular views and full ski concierge and ski butler service. (Winter, 2019)
- **Four Seasons Philadelphia** At Comcast Center (Spring 2019) - Four Seasons returns to BPhiladelphia in the city's tallest tower, with restaurants by Jean-Georges Vongerichten and Greg Vernick, and a 57th-floor spa and pool, aiming to be the first true luxury resort in Philadelphia.
- **Caldera House** – Jackson Hole – though just 8 keys, Caldera House makes a bold statement on the Jackson Hole scene. Each is a sprawling villa ranging from two to four bedrooms and offers full private staff including chef, wait staff, maid, house butler, and even a ski butler and concierge, making it a perfect home for multi-gen families.

- **The Liming Bequia, St. Vincent & The Grenadines** – This lovely new boutique resort will feature 9 stylish villas including a 9 bedroom mansion on the sleepy island of Bequia on the Grenadines, providing escapists a new place to hide from the paparazzi.
- **Quinta da Comporta, Carvalhal, Portugal** - Imagined and invented by renowned Portuguese architect Miguel Cãncio Martins, the hotel itself merges seamlessly with its surroundings, from the sun-bleached woods to the sandy furnishings. (January 2019)
- **The Academy, London** – Tucked away in the literary and intellectual heart of the capital is the Grade-II listed Academy Hotel. From the outside, this London townhouse seems straight from a Georgian period drama. Yet step inside the door, and you'll discover contemporary interiors by New York-based Champalimaud design. (January 2019)
- **Vintry & Mercer, London – Fall 2018** - Set among the historic livery halls and winding lanes of this ancient London district, Vintry & Mercer is a hotel with a story to tell. Named after the local fine wine and silk trading guilds, this boutique retreat is immersed in the commerce and culture of the City of London – both past and present. The sleek exterior of Vintry & Mercer looks every inch the contemporary urban hotel. Yet inside, it plays with your expectations, fusing organic elements such as growing plants with cutting-edge craftsmanship. While utterly up to date, the rooms and suites contain plenty of nods to the City's heritage.

Other Notable Openings:

1. Four Seasons Sao Paulo
2. Four Seasons Kuala Lumpur
3. Alila Villas Koh Russey, Cambodia (January 2019)
4. Thompson Dallas (November, 2019)
5. Conrad Maldives Rangali Island's first undersea villa in the Maldives,
6. Savoy Palace, Funchal, Portugal
7. Emerald Maldives Resort & Spa - Raa Atoll, Republic of Maldives - Opening June 2019
8. Flying Clipper
9. The PuShang Hotel and Spa, Xiamen, China
10. TRS Coral Hotel, Cancun, Mexico
11. The Legian Sire Lombok
12. The RuMa Hotel and Residences, Kuala Lumpur
13. Four Seasons Kuala Lumpur
14. The PuXuan Hotel & Spa, Beijing, China
15. The Houghton, Johannesburg, South Africa
16. Ānanti Resort, Residences and Beach Club, Rezevici, Montenegro
17. Baglioni Resort Maldives
18. Hotel Villagio (Yontville, January 2019)
19. Joli Maldives (January, 2019)
20. Beach Enclave Long Bay in Turks & Ciaos. Opening November 2018.
21. Rosewood Bangkok
22. Rosewood Guangzhou

23. Four Seasons Kuala Lumpur (January, 2019) - steps from the Petronas Towers and Kuala Lumpur City Centre.
24. Locke hotels (Nikki) – extended stay
25. Edition Rome (Sep-19)
26. West Hollywood EDITION (Apr-19)
27. Matild Palace, a Luxury Collection Hotel, Budapest(Jul-19)
28. The Hotel Ajax, a Luxury Collection Hotel, Telluride (Mar-19)
29. The Ritz-Carlton, Perth (Apr-19)
30. The Ritz Carlton, Jiuzhaigou (Sep-19)
31. Zadun, a Ritz-Carlton Reserve, Cabo (Mar-19)
32. The Ritz-Carlton, Mexico City(Nov-19)
33. The Ritz-Carlton Rabat, Dar Es Salam(May-19)
34. The St. Regis Hong Kong (May-19)
35. The St. Regis Amman (Apr-19)
36. W Philadelphia (Jun-19)
37. W Milan (Dec-19)
38. W Muscat (Feb-19)
39. W Abu Dhabi - Yas Island (Jul-19)
40. W Aspen (Jun-19)
41. Six Senses Fort Barwara....in Rajasthan, India (November , 2019)
42. Mpala Jena in Zimbabwe (March, 2019)
43. Al Seef Hotel by Jumeirah, Dubai (*January, 2019*)
44. Jumeirah at Saadiyat Island Resort, Abu Dhabi (*January, 2019*)
45. Jumeirah Al Wathba Desert Resort (*opening January, 2019*)
46. Zabeel House Al Seef by Jumeirah (*June, 2019*) Dubai
47. Jumeirah Bali (*opening April 2019*)
48. Jumeirah at Muscat Bay, Oman (*Q1 2019*)
49. Jabal Omar Jumeirah Makkah Hotel, Saudi Arabia (*opening Q2 2019*)
50. The Waldorf Astoria Bangkok
51. Waldorf Astoria Hotels & Resorts
52. Miraval Austin Miraval Austin – Dec 15 2019
53. NObu Chicag
54. Atlantis Sanya
55. Madarin Oriental Doha
56. St Regis Toronto

About Jack Ezon: Jack S. Ezon is founder and Managing Partner at Embark, a luxury lifestyle partnership specializing in bespoke travel experiences. In his role Jack oversees the company’s direction, expansion plans, strategic partnerships, PR and customer journey mapping while inspiring talent and business development.



Ezon is one of the most well connected and influential travel advisors in the world, known as a true innovator and outspoken leader in the global luxury travel business. His deep and broad relationships coupled with his global black book of clients and local purveyors had him dubbed the “*Olivia Pope of travel*” by Bloomberg in 2018. Lauded for his ability to deliver luxury travel experiences tailored to the next generation of travelers, he has attracted a core group of UHNW Generation-X and Millennial clients and built one of the America’s largest luxury social destination event businesses, partnering with an elite group of celebrity event planners to orchestrate incredible destination weddings, birthdays and other celebrations around the world.

As a member of Virtuoso, Jack sat on the Hotels & Resorts Committee for 8 years and served as the first chairman of Virtuoso’s Next-Gen Committee, a group focused on attracting the next generation of luxury travelers and advisors. Well respected by some of the world’s most renowned hotel companies, Jack is often sought after for his insight on branding and product positioning, sitting on advisory boards for many travel companies including Belmond, Ritz Carlton, Aman and Accor. Ezon has an eye for new talent, which is why he has focused his efforts on cultivating savvy Millennial advisors and has launched Embark as a lifestyle partnership, providing equity opportunities for forward-thinking leaders in the luxury lifestyle and travel space.

Previously, Jack built Ovation Travel’s leisure business under the banner of Ovation Vacations and Ovation Celebrations, growing it from \$3 million to over \$350 million. A father of four, he graduated from New York University’s Stern School of Business and received a J.D. from Cardozo School of Law.

About Embark: Embark is an international luxury travel and lifestyle partnership group, attracting the very best forward-thinking talent through shared ownership. This cutting-edge concept in the luxury lifestyle space has helped the company launch with over \$100 million in sales to a sharply-focused, highly confidential black book of ultra-high net worth clients composed mostly of Gen-X and Millennial A-list celebrities, sports stars, Fortune 500 executives, dynamic financiers, entrepreneurs and real estate moguls around the world. Not only does the company pride itself of creating tailored, meaningful global experiences for individuals, it also hosts the largest luxury social destination event businesses in the Americas. Embark’s platform encourages synergies amongst partners touching an UHNWI’s life with expert advisors specializing in an individual’s preferences, passions, life goals and legacy.

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