THE OVERVIEW

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Coworking it out

The Criminal Finances Act 2017
Growing collaboration

Welcome to THE OVERVIEW

Businesses, particularly in the hospitality sector, are walking a tightrope at the moment when it comes to staffing. There isn't a reader of these pages who wouldn't like at least 40% more staff, but is stymied by two facts: working in hospitality is not everyone's dream and to lure them over would require cash bribes of the like no-one in the sector can afford.

Well, not quite no-one. Some of the larger - much larger - organisations are using fancy weaponry in the war for talent and are offering staff perks including cheap loans. But this is not open to everyone, with the sector under pressure from all cost sides and the consumer not inclined to bear more.

The sector found itself under attack again last month by the Low Pay Commission, which said that hospitality had one of the largest numbers of underpaid employees, possibly because it employed a significant number of minimum wage employees and because other benefits, such as housing, were often rolled in.

The wage issue continued to raise its head, with the news that the government was reportedly considering raising National Minimum Wage again. This was attacked by a number of members of the sector, still struggling to meet the recent increases and concerned that they would be forced to pay a high price for political ambition.

Employers must instead work to extol the benefits of working in the sector and rid it of its image of poor recompense and unsociable hours, instead telling a tale of rewarding careers. The much-maligned Millennials are, we're told, looking for experience over and above and this sector has much to offer in that field. They also value training, as we at HOSPA can vouch. Talk to our Professional Development team about how staff retention doesn't have to be all about cash.

Katherine Doggrell

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Planning to stay ahead

HOSPA CEO Jane Pendlebury looks ahead to dates in the HOSPA calendar

June is proving to be an active month for HOSPA Events. We have three separate meetings. The first on June 10th is covering the very important topic of Keeping Guest Data Secure at The Jumeirah Carlton Tower Hotel. We will be looking at both the cyber threat and also the on-going attention necessary to stay ahead of the General Data Protection Regulations (GDPR) which have now been in effect for a year. In many cases hotels and related businesses took the opportunity to clear out old and out-of-date data and implement new procedures. But the key is to maintain the urgency that was keeping people awake in the run-up to May 25th, 2018. And the cyber threat is a constant worry for IT Directors across all industries, the world over. Hotels are no exception - and arguably a bigger target than other businesses.

Our second meeting is our always popular and well attended annual breakfast meeting with BDO in its office at 55 Baker Street, London. BDO never fails to deliver concise, clear, yet detailed explanations of current hot financial topics. A great number of HOSPA members are qualified accountants and the BDO presentations always strike the right chord to satisfy their desire for full facts and implications whilst not baffling the other hoteliers in the audience. If you can attend on 13th June, I would recommend it.

Our third event is in Scotland on June 26th. HOSPA sponsors Criton are hosting a networking event at the new Kimpton Hotel in Charlotte Square, Edinburgh. It promises to be an evening full of fun and networking. This is a must-attend event for our Scottish members and those travelling to the area at the end of June.

All of these events promise to be well attended and full of great content. Be sure not to miss out - reserve your place now by emailing us at HOSPA@HOSPA.org

This year HOSPA is 50 years old. We will be celebrating this milestone around HOSPACE, which as you know, is being held on November 28th at The Royal Lancaster Hotel. It's fantastic that one of our key founders - Howard Field - is still closely involved with HOSPA and a great support for me. I know I am not alone in valuing Howard's wise words, his encouragement and in making the most of his industry knowledge. Howard is still very active in hospitality, not least as a non-exec director at Firmdale Hotels and on the board of trustees at The Savoy Educational Trust. We all owe him and his co-conspirators in 1969 a huge debt. Thank you, Howard.

We have very exciting developments on the programme at HOSPACE - watch this space for full details, but I can confidently say that we will be hosting an industry 'first' during the day this year.

As I write, I am listening to the results of the European elections. Whilst having always had an interest in politics, I am in no doubt that these European elections have held my attention considerably more than ever before. The results appear to prove we continue to be a divided country when it comes to our relationship with Europe. The uncertainty is certainly causing issues in itself. I don't envy anyone trying to lead the country through this. On the positive side, at least we can expect to have a clearer picture before HOSPACE this year.

Gretchen Abrahams Deputy Group Revenue Manager with the Mantis Collection

Gretchen was winner of the highest achieving student award on Revenue Management Level Two, completed in February 2018.

Gretchen was presented with her Award at the Annual Awards Ceremony in January 2019.

Gretchen is based in Port Elizabeth, South Africa and has a degree in tourism management, part of which required her to do service training, which she completed in a front office position at a 4-Star hotel in Port Elizabeth. From there, Gretchen has spent much of her career in front office/ reservation department roles at a variety of hotels and lodges. With an affinity for numbers, statistics and procedures, Gretchen also had considerable consumer facing experience which allowed her to gain an appreciation of different hotel clienteles and their reasons for travelling.

Working for the Mantis Collection exposed Gretchen to all aspects of running a hotel thanks to the small nature of the properties, which included marketing. Having a broad understanding saw her move towards revenue management in a role that would help the company grow.

Of her time as a HOSPA learner, Gretchen said:

"The course allowed me to take what I knew purely in practice and apply it in a structured theoretical and strategic manner. It also taught me to not look at data in isolation, but to combine it with other information from various sectors within the team to draw insightful conclusions such as sales and marketing, customer relations, operational data and so on."

In the future, Gretchen hopes to bridge the gap between sales and marketing, revenue management and operations within her organisation.

The HOSPA Level 2 course in Revenue Management is studied over a period of five months during which learners will develop their knowledge of the following topics:

- Customer centric revenue management
- Pricing strategies
- Evaluate trends in demand and identify opportunities to optimise hotel performance
- Interpret pick up reports, booking curves and demand dashboard data
- Understand what data is practical to include in a forecast
- Inventory and price management with new technologies focussing on total revenue management for different market segments.
- Describe the marketing planning process and the key steps within it
- Identify the steps how to implement a marketing plan

We are now enrolling for the next intake to the HOSPA Revenue Management courses commencing in September 2019. For more information email us at education@hospa.org or visit the HOSPA website at www.hospa.org/education

Hotels coworking together

The hotel sector has noted the success of WeWork and is looking to coworking to revitalise its low-earning public spaces, Katherine Doggrell reports.

According to JLL, the flexible office space market has been growing in recent years, doubling in size since 2014 and set to grow by up to 30% per year over the next five years.

The group said that barriers to flex space adoption included concerns around brand dilution, cost, security and confidentiality. But similar risks were associated with non-adoption, around staff retention and attraction, as well as being perceived as stale. With over 700 flex space providers in the industry, consolidation was, JLL said, inevitable and a downturn would accelerate this process. The well-capitalised and experienced providers with geographical diversification will flourish, as well as innovative and niche operators providing a next-generation offer.

Investors who needed to balance the need for stable long-term income with occupiers seeking flexibility faced a number of challenges, from understanding how flexible space will impact asset valuations and market transparency, to the effect on supply and demand dynamics, lease lengths and yields.

In response, some landlords and developers would consider establishing their own flex space concepts; collaborating with existing providers; and looking at M&A. Landlord-initiated concepts are burgeoning in cities such as Amsterdam - where they account for 25% of all flex space - London and Paris.

JLL's key findings included:

- Globally, the amount of flex space in the 20 largest flexible office markets grew by 30% in 2017 - equivalent to around 1 million sq m.
- Flexible office space will account for 30% of corporate portfolios by 2030.

The market was split into three types of flex space user:

- Conservative: low percentage of flex space in their current portfolios; zero/limited expansion planned
- Experimental: low to moderate percentage of flex space in existing portfolios; up to 10% and beyond in next 3-5 years
- Visionary: significant usage of flex space; clear and ambitious plans for widespread adoption, reaching upwards of 20% of portfolios

Dan Brown, head of flex space, EMEA, JLL, commented: "The rise of flex space is resulting in one of the biggest

shifts across the real estate industry that we've ever seen. The consumerisation of real estate, which we've already witnessed in hospitality and retail, is reshaping business models and investment strategies alike. Our research shows how different markets and different companies are moving at varying speeds, and as the dramatic growth showing no signs of slowing, companies, investors and developers must keep on top of the evolution to understand what this means for their specific business ambitions."

According to the 2017 Global coworking Survey, there were approximately 11,300 coworking spaces with 835,000 members last year, with the study predicting that there would be over 1 million members this year.

How do coworking spaces define themselves?

- 79% of spaces say that they are "more than just a coworking space", while 15% sit comfortably as coworking spaces, and a slight 6% remain undecided.
- The central elements that make a space more than simply a coworking space is the addition of events, business accelerators and coffee shops.
- Around 60% of spaces were self-described as "casual".
- 80% of coworking spaces use social media, specifically Facebook, and online presence as the biggest draw for new members.
- While there will always be coworkers who require more privacy, or a team office, 75% of coworkers still work in open and flexible areas. This was only a 2% decrease from a reported 77% in 2015/2016.
- 55 % percent of coworkers said that they work on their own primarily, which is a slight decrease from previous years.
- 71% of participants said that they have collaborated with other members within the last 12 months, at an average of 4 collaborations.

Source: 2017 Global Coworking Survey

One of the biggest brands in coworking is WeWork. The company has four different membership plans, from on-demand use to hot desking, through a dedicated desk to a private office. The company has branched out into shared living - WeLive - but has also started offering accommodation at WeWork - becoming a hotel or private members' club by any other name.

The latest hotel company to get involved is Accor, which has relaunched its Nextdoor coworking product as Wojo, planning to become the largest coworking brand in Europe by 2022.

Accor said that coworking spaces would be in Accor hotels and Wojo sites as well as in stations, airports and shopping malls, with the company commenting that they were intended "as community hubs and will also be located in purpose-built locations".

The brand will use three models. The first, Wojo Corners, will be dedicated co-working spaces located across "a broad range of Accor hotels as a first step and then across train stations, airports and shopping malls". From April, several other Corners will open in Paris and around France in 2019, while more than 100 other addresses will be inaugurated all over Europe by 2022. The name was a combination of Work and Mojo.

Wojo Spots offer access to secure wifi for a monthly fee, giving access to Accor hotels for non guests. Over 150 Wojo Spots were set to be rolled out across Paris and Lyon by this summer, with over 1,000 set to launch across Europe by 2022. Accor says that "these spaces make it possible for nomadic workers to work without a fee with the guarantee of a personalised service, a friendly atmosphere and a secure and reliable wifi connection in design spaces".

Wojo Sites will be standalone co-working spaces "over several thousand square meters in dedicated buildings, combining communal zones (bars, lounges, kitchens) with shared spaces, meeting rooms and dedicated offices". They will be integrated "from the outset in certain real estate projects". There are currently 10 sites open in Ile-de-France and Lyon, with a target of over 50 locations by 2022.

Franck Gervais, CEO Accor Europe, said: "We have the assets (brands, spaces, teams), we have the services (restaurants, bars, meeting spaces) and we are open 24/7. By participating in Wojo's ambitious development, we are optimising the use of these assets and are creating value for our owners by being open to a new type of customer, i.e. coworkers."

"We are reimagining hospitality not as a place or service, but as infinite connected moments, whether you want to live, work, or play. We are creating a holistic ecosystem around the consumer and Wojo is a great example of how our unique augmented hospitality strategy will allow us to connect into the everyday lives of customers," added Steven Taylor, chief brand officer.

In 2017 Accor & Bouygues Immobilier created a joint venture to develop coworking spaces under the brand Nextdoor. Since then, the pair have worked to extend the model to "third places", beginning with the group's hotels.

AccorHotels was not the first to look at mobile workers. In 2013 Marriott International launched Workspace on Demand, a collaboration between it and LiquidSpace, a mobile/web app connecting people in search of flexible workspaces with venues providing workspaces which the operator said would be "easy to find and simple to reserve, just like a hotel room".

The company has now looked to coworking at its relaunched Sheraton brand, with work-friendly tables and a coffeehouse brand.

The beginning of this year saw the launch of Spacemize, an online platform allowing hotels and restaurants in London to join the trend, now matter how small. The platform charges consumers for£99/month to enjoy unlimited tea and coffee, plus exclusive discounts on lunch, meeting rooms, gyms and spas. The start-up partnered with seven hotels (W Hotel London, Sheraton Park Lane, Andaz Hyatt) and selected restaurants (Mamounia Lounge Mayfair), turning their empty tables into a work area from 9am to 5pm. High end hospitality operators have embraced the concept to maximise empty commercial space and deal with growing Brexit concerns.

WeWork remains the one to beat. At the end of 2017 Airbnb confirmed that it was piloting a programme with WeWork, which will see guests offered a space in a nearby WeWork when booking through the shared accommodation platform.

2018 saw WeWork raised USD1bn from SoftBank, making the announcement as it reported that it had doubled its second-quarter revenue, but quadrupled its losses. WeWork's CFO, Artie Minson said that the company was making a loss because of the cost of sites yet to open. He said: "We incur the expense today and the revenue and the operating margin of those buildings will come on next year."

With backing like that, hotels have a tough fight on their hands.

Restaurant closures accelerating as high street pressures mount

The number of restaurants in Britain fell by 2.8% in the year to March 2019, the latest edition of the Market Growth Monitor from CGA and AlixPartners reveals - with high streets in the south of England, excluding London, hit especially hard by closures.

The figure equates to net closures of 768 restaurants over 12 months, or around 15 a week. It marks a fifth successive quarter of decline in the sector, bringing to an end a boom period that saw restaurants grow in number by more than 15% between 2013 and 2018.

The bulk of closures have been of independents, but group restaurants - managed sites from operators with more than one location - also fell in number, by 1.1%. The pace of closures for these group operators was significantly higher in the south of England (2.8%) than in the north (0.4%) - a sign that restaurant levels have reached saturation point in many southern towns and cities. Group restaurant numbers on British high streets meanwhile fell by 2.4% over the 12 months to March, in sharp contrast to net openings of 1.8% in suburban areas.

But while restaurants struggle, the Market Growth Monitor reveals a more positive picture for the drink-led pubs and bars sector. Three years ago the report found that closures in this part of the market were averaging 31 a week - but the rate tumbled to 13 a week in the 12 months to March 2019. With premium and all-day bars performing particularly well, it suggests that Britain's long-term clear out of unsustainable pubs may be nearing an end.

CGA vice president Peter Martin said: "CGA research has charted a remarkable surge in restaurants over the last decade - but our latest Market Growth Monitor makes it clear that the gold rush is over. Some distinctive and resolutely customer-focused restaurant groups continue to flourish, but for brands that have over-reached themselves or lost sight of their proposition and purpose, there are undoubtedly more tough times ahead. Major challenges on British high streets, like rising costs and declining footfall, are adding another layer of difficulty."

AlixPartners managing director Graeme Smith added: "The positive take on this clear out is that ambitious and well-resourced operators now have more headroom for growth, and the Market Growth Monitor identifies bright prospects for many groups in the drink-led pub and bar space in particular. Brands that can deliver a compelling premium drinks offer and strike the right balance with food have all to play for in 2019 and beyond. The next 12 to 24 months offer an opportunity for well-funded restaurant groups to expand into prime sites at much reduced costs - and if you can catch the right consumer wave the returns are impressive."

The quarterly Market Growth Monitor from CGA and AlixPartners provides many more insights into restaurant, pub, and bar openings and closures. All data from the Monitor is drawn from CGA's Outlet Index, a comprehensive and continually updated database of all licensed premises in Britain.

Three gardening tricks to grow a collaborative hotel

Even though Accor has embraced collaboration as part of their corporate vision, it is a quality that we associate more with Palo Alto start-ups than with hotels, regardless of the number stars they bear.

Service requires hierarchy, and hierarchy requires verticality, quite the opposite of collaboration. How can a collaborative organisation be defined? Harvard Business Review is never short of good definitions and provides additional insight in the motivational dimension of collaborative structures:

"Collaborative communities encourage people to continually apply their unique talents to group projects-and to become motivated by a collective mission, not just personal gain or the intrinsic pleasures of autonomous creativity."

Advertisement

Could a collaborative structure be the key to hotel staff motivation and performance? As a hotel manager, have you ever asked yourself why employees don't act the same when you are at work and when you aren't? Why you are struggling to get the whole organisation moving in the direction you envision? The answer could be: because the vision is not coming from the organisation itself. Because the organisation is not collaborative enough. Yet collaboration can be developed, grown, like a beautiful garden by a gardener. Major organisational change can be achieved at barely zero cost.

"We cherish and nurture the uniqueness of all our talents, tailor opportunities to their needs, and encourage leadership through empathy and collaboration." - Sébastien Bazin.

Cultivate our own garden = Lead by example

When was the last time you felt inspired by someone? What attracted you in that person? What did that person have that you don't have? The way we carry ourselves speaks louder than words. Our everyday behaviour has way more impact on the world around us than we think. We know and we forget that our staff won't remember what we said, but will remember how we made them feel. We cannot take employees where we haven't been and we cannot teach them what we haven't learned. What is our attitude? Are we displaying the corporate culture we preach? Are we inspired? Are we inspiring?

Richard Branson is famously both "I'm quite involved in hiring for leadership and I look to hire my weaknesses. Personality before CV. (…) I like to take chance on people, and whenever possible, promote from within - it sends a great message to everyone in the company when someone demonstrates a passion for the job and leadership skills at every step along the way and is rewarded with a leadership role."

Fertilise to boost the bloom = Make people feel important

Christian Clerc, former EHL graduate now Director of Worldwide Operations at Four Season Hotels once wrote "You can't teach

someone to care. Either you care or you don't". Actually It should read "Either YOU care or THEY don't."

Our job is not to become psychologists, our job is to treat our employees and customers the best we can. For example, Centara Hotels & Resorts has created an "Inspiration Room" where each employee can learn and get advice in order to grow in their specific department. The results are increased performance and a more committed staff. They understood that investing in employees is a game changer. The staff is happier and so are the guests. We must stop thinking that our co-workers will bloom and get great at work if we care about everything except them. Lonnie Mayne, founder and CEO of Red Shoes Living puts her money where her mouth is:

"Treat your employees like the incredible humans they are. When you get this right, engagement naturally follows."

And incredible humans include housekeeping.

Let go of the weeds = Let go of bad control

Angelica Fuchs was formerly an intern at the world famous Hôtel de Crillon, a Rosewood Hotel in Paris. "My experience at Rosewood Hotels was extremely rich. Right away we were considered as Rosewood family members and were given to possibility to create. Even though I was only an intern, I was trusted to launch a committee and could train the new staff, this is why this company impacted me in a profound way."

There are two sides of control. One is good, the other is bad. Good control is when it comes to matters, management decisions or the new concepts that newly implemented. Yes, these things need control.

On the other hand, bad control is people control. The painful truth is that we control people because we fear. We lack trust and we are afraid something will go wrong. Control is the only remedy that will make us feel good. Are we controlling because we don't trust employees? Are we controlling because we don't believe in ourselves? We need to get rid of the fear of failure because controlling staff might be the very thing that make them riot when we are not here. They feel pressured, and as soon as the cat is gone the dancefloor is open!

At Rosewood hotels, instead of making new staff prove their way to the top, they welcomed and empowered them right from the beginning. This made new staff feel trusted and believed in, rather than managed and controlled. Back in the days, hotel staff at Four Seasons took upon themselves to get a recipe and then bake a loaf of gluten-free bread for one particular guest who had requested it - years before gluten-free products were readily available. "This only happens when employees feel they're empowered to do something." noted Christian Clerc.

In a nutshell. 3 practical gardening tricks for hoteliers to grow collaboration:

- Demonstrate through your actions the vision you want your staff to have. (start with your OWN garden)
- Show your employees that you genuinely care about them through personal concrete actions showing trust. (Fertilise to boost the bloom)
- Don't be afraid of failure, give space to your employees and learn to celebrate initiative. (Deweed your garden beds)

If hoteliers apply these simple and low cost tricks they will see their hotels evolve towards the collaboration that tech companies were born with and hotels now need to compete.

Marie-Laure Kaeser has previously worked for the Savhotel group. She researches hospitality at Ecole hôtelière de Lausanne under the supervision of Igor Sekulic.

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Gathering steam on climate change

HOSPA CEO Jane Pendlebury reports on the sector's responsibility to act on energy usage

The evening of Tuesday 14th May was indeed an enlightening and educational one for HOSPA members. Kindly hosted by the Jumeirah Carlton Tower - the speakers were all exceptionally knowledgeable and passionate about their specific areas of energy management.

Following the welcome, the evening kicked off with a presentation from the Government Department for Business, Energy and Industrial Strategy (BEIS). Guy Norton, the Business Engagement Lead for the Smart Metering Implementation Programme talked a little about climate change and the future of energy. It is hard to ignore climate change when official statistics show that 18 of the 19 warmest years have all occurred since 2001. In hospitality, we consume the equivalent energy of 1.2 million households, but there is lots we could be doing to reduce this if business owners could allocate some time and perhaps a little budget. Guy talked about the smart meter opportunities which are endless and money saving - if you don't already take advantage of their benefits, please do find out if you are eligible for a smart meter.

Guy was followed by Katie Lindsay, who is Principal Policy and Programme Officer for Energy Efficiency and Delivery. Katie works with the Greater London Authority representing the Mayor of London. She talked about air quality and explained that a baby born in London during 2010 would lose at least two years from their life expectancy if the pollution remained at the same levels. Shockingly, she told us that energy intensity was highest for premises in hospitality, followed by emergency services and health. As hotels often occupy the oldest buildings, we have greater potential to make savings. The GLA have a cleaner heat cashback scheme - ideal for London based small or medium sized enterprises. The scheme allows for the replacement of boilers and heating systems and can save 30-40% of the costs. The objectives are so simple - improving air quality, reducing CO2 and NOx emissions and the reduced risk of carbon monoxide poisoning. If that isn't reason enough - perhaps saving up to £7m per year off SME fuel bills would swing the balance.

Joanna Kapatou from Considerate was up next and talked to us about the terrible effect of tourism and transport on carbon emissions. Whilst contributing 10.4% of global GDP, 313 million jobs - representing almost 10% of total employment - tourism also accounts for 8% of carbon emissions. Hotels have a long way to go in order to stay within the Paris Climate Agreement thresholds. The good news is that Considerate is bursting with useful suggestions to help reduce energy waste - all of which help improve brand reputation through developing sustainable and responsible commitments to relevant stakeholders. In conjunction with BEIS, it has introduced fluttr, which is an app to help reduce your energy costs and ultimately contribute to our planet.

Finally, Sam Lloyd from The Carbon Trust took to the podium and explained that its mission is to accelerate the move to a sustainable, low carbon economy. They offer advice, measure environmental footprints and help develop low carbon technologies. Sam's message was consistent with the previous speakers, in that there are significant financial savings to be made through changing attitudes. Given that up to 30% of your business costs could be on energy, even small changes can have a big impact. His top tips were to

- Install heating controls (which can account for 60% of total energy costs)
- Upgrade lighting to LED (can account for 25% of total energy costs)
- Improve energy management practices

Once again, the audience were offered access to funding. The Carbon Trust has its Green Business Fund - based on some eligibility criteria. Sam ran through a couple of case studies, one a country house hotel which is saving £4,700 per year and expecting payback within 4 years; the second a city hotel saving £3,359 per year and expecting a similar payback timetable.

There are tools available to help measure your carbon footprint and to benchmark your use. There is advice and funding aplenty but the first step, which is often the hardest, is to commit to making changes and to help save our planet.

Thank you once again to all our expert presenters. All the presentations can be viewed in full on the HOSPA website - in the members' meetings resources area.

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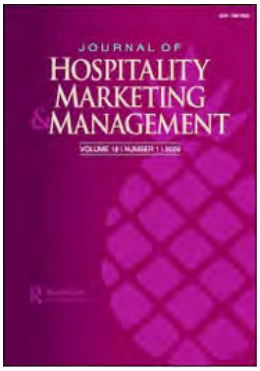

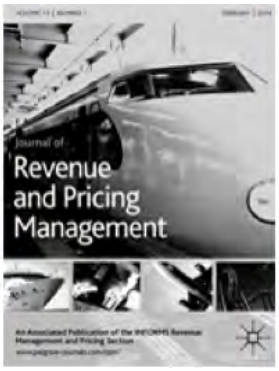

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Delivery bites

Amazon's investment in Deliveroo should be good news for takeaways, but what about the restaurants, asks Katherine Doggrell

This month saw Deliveroo announce that Amazon was leading a new $575m Series G preferred shared funding round, alongside existing investors T. Rowe Price, Fidelity Management and Research Company, and Greenoaks, taking the amount which Deliveroo has raised since launch to $1.53bn.

The new investment will contribute to:

- Growing Deliveroo's engineering team based in its London headquarters
- Expanding Deliveroo's delivery reach.
- New innovations in the food sector, for example through delivery-only super kitchens "Editions", as well as new formats that will help restaurants expand to new areas.

Will Shu, founder and CEO of Deliveroo, said: "This new investment will help Deliveroo to grow and to offer customers even more choice, tailored to their personal tastes, offer restaurants greater opportunities to grow and expand their businesses, and to create more flexible, well-paid work for riders. Amazon has been an inspiration to me personally and to the company, and we look forward to working with such a customer-obsessed organisation. This is great news for the tech and restaurant sectors, and it will help to create jobs in all of the countries in which we operate."

"We're impressed with Deliveroo's approach, and their dedication to providing customers with an ever increasing selection of great restaurants along with convenient delivery options," said Doug Gurr, Amazon UK Country manager. "Will and his team have built an innovative technology and service, and we're excited to see what they do next."

So far so fun, but the end of last year saw investment bank UBS release a report titled "Is the Kitchen Dead?", in which it was cautious about the impact of the rise of delivery sales. The bank forecasts that delivery sales could rise an annual average of more than 20% to $365bn worldwide by 2030, from $35bn.

The investment bank said: "There could be a scenario where by 2030 most meals currently cooked at home are instead ordered online and delivered from either restaurants or central kitchens.

"The expertise currently resides in-house (to cook, as it once did to produce a pair of trousers) could potentially be rendered immaterial, or the expertise might shrink to preparing breakfast or cups of tea, much like sewing has arguably shrunk to basic clothing repairs carried out at home. … We could be at the first stage of industrialising meal production and delivery.

"For the 25% plus of single-person households in the US and UK, the economic benefits of sharing rather than owning an

underutilised kitchen are likely to become more and more apparent," UBS said.

It may be good for single-person households and the cooking averse, but the response from the sector has been mixed. Haysmacintyre reported that just 18% of operators considered delivery to have a positive impact on profit, with 35% of respondents commenting that delivery had a positive impact on turnover.

They reported 7% of turnover is derived from delivery orders, rising to 9% for London-based operators.

Despite this perception, 47% of food-led businesses reported that they had a delivery agreement in place, rising to 82% in London.

Deliveroo was dominant, with 92% of these businesses using the delivery company, followed by 37% which use Uber Eats and 11% which use Just Eat. Commission levels averaged at 24%, down from 27% in 2017.

"Our data reflects the sentiment we regularly hear expressed by clients and contacts grappling with the rapid pace of change in customer expectations," said Haysmacintyre hospitality sector partner Mark Shewring. "There's no escaping the fact that consumers are increasingly looking for restaurant-quality food in the home, but that for restaurants the current delivery model is proving to be very challenging.

"It's clear that for now, aggregators hold the whip hand, enabling them to set high commission rates whilst taking ownership of the customer for themselves as they hold and process customer data with no visibility for the restaurant. Furthermore, the operator faces pressure on the kitchen service to meet delivery demand, as well as disruption to the front of house operation with delivery drivers congregating in or outside the restaurant.

"Restaurants find themselves needing to consider carefully how best they can maximise the benefits of a delivery operation, build it into their strategic planning for new sites and select the best route to market."

Global advisors Duff & Phelps director Jimmy Saunders added: "The future will undoubtedly see the online home delivery market evolve further and we already see certain aggregators operating 'dark kitchens' servicing only online delivery orders.

"This follows the 'dark store' model operated by some of the supermarkets as they first transitioned into the online grocery model. At the moment, smaller operators don't have the scale or capital to do this themselves, much as independent grocers couldn't compete with the supermarkets; however, the difference is that the aggregators are presently applying this model in conjunction with existing branded restaurant chains.

"It is only a matter of time before the aggregators themselves look to create white label offerings of a quality to match branded restaurant food so that they can take the additional margin themselves. While this is a clear risk, it also presents opportunities for the aggregators to exercise much more control over output and reputation. We only need to look at supermarkets to see how quickly the private label has caught up with the brands over recent years."

The trend is unlikely to go away. Research from digital ordering platform Preoday showed that initially 74% of consumers said that they order food online or through a mobile app. Thirty per cent used platforms such as Deliveroo and Just Eat, 23% dined out at the restaurant itself and 21% weighed up both options and decide.

Once consumers were informed that out of the 68% of food and drink organisations paying commission fees to digital ordering suppliers, 82% of them believed they were paying "too much" and 38% found that once the use of third-party delivery begins, it is difficult to stop, their responses differed.

The majority of consumers (70%) stated that they would prefer to order directly to ensure their money goes straight to the restaurant, while 15% didn't care how much money the restaurant received from their order.

Preoday CEO Nick Hucker said: "The consumers' change in response is key. It shows that with simple education, many customers would be willing to change their ordering habits. It also demonstrates that they do care and want to support their favourite brands. Given how much revenue some venues lose to third party platforms, this finding could be significant."

There were parallels to be drawn with the hotel sector, where the distribution of hotel rooms online has been driven not by the hotels themselves, but by the rise of online travel agents, which were able to get the jump on the market and were commissions could reach around 25% on a bad day. The sector has tried to claw back control, with greater M&A seeking to create companies large enough to compete with the options on the OTAs and has also sought to leverage loyalty programmes to encourage booking direct. Fine for the larger players, less so for the smaller.

There is hope for the restaurant sector, with the opposing parties in hotel land realising that they need each other and that antagonism is not the way to build business. This may yet be some time off for restaurants, who need to balance how much they need the delivery option.

BDO

Corporate Criminal Offences - lessons learned

James Egert, Tax Partner, BDO, looks at the progress of the Criminal Finances Act 2017

It is now 18 months since the Criminal Finances Act 2017 and the Corporate Criminal Offences (CCO) came into force on 30 September 2017. As you may already know, the Corporate Criminal Offences (CCO) were introduced to ensure that both corporates and partnerships took "an active and increased responsibility for preventing the facilitation of tax evasion."

As a reminder, the legislation means that if an "associated person" of a business criminally facilitates tax evasion, and the business is unable to demonstrate that it had reasonable procedures in place to prevent such facilitation, the business is guilty of a criminal offence. This could result in prosecution including unlimited fines, reputational damage, regulatory sanction and potential director disqualification. The definition of "associated person" is quite wide and essentially means anybody (whether an individual, corporate or partnership) who provides a service for or on behalf of the business. For most organisations, this would include a focus on employees, contractors, agents, and third parties from external suppliers or outsourced providers. There are two offences, namely the facilitation of UK tax evasion, and also the facilitation of overseas tax evasion - anywhere in the world.

Hospitality businesses are in a unique position among service businesses and have to remain dynamic, innovative and entrepreneurial to meet the evolving expectations of their customers and stakeholders in a rapidly changing environment. At the same time, new requirements around distribution of tips, troncs, gratuities and service charges are creating both tax risks and additional compliance burdens. In addition, there are the new IR35 rules that are being introduced affecting how you need to manage the use of off-payroll labour.

Both of these areas are higher risk for CCO and this is over above where facilitation of tax evasion can arise for all businesses. Simple examples could be anything from one of your Accounts Payable team facilitating tax evasion for a supplier by knowingly paying into an overseas bank account so that the supplier can 'hide' the income from UK tax authorities, or indeed any other tax authority. Other examples could be more elaborate VAT fraud in your supply chain where you could be the end user, PAYE and NIC fraud whereby someone is paid as a contractor where there is knowledge or a clear indication that person should be on the payroll. Other typical areas that are more at risk of facilitation of tax evasion include businesses that rely on cash payments, where there are global operations especially in high risk jurisdictions, multiple use of contractors/subcontractors/agents, multiple suppliers and long or complex supply chain, where there are concerns over commerciality of business arrangements (e.g., non-transparent invoicing schemes), and in some cases, where there may be questions over the 'aggressiveness' of tax planning.

It is important to state that there is no de minimis to this legislation and all organisations are caught from global hotel groups to small independent restaurants.

Demonstrating a defence

In late 2018, HMRC commissioned research, the purpose of which was to evaluate the extent to which organisations are responding to the legislation. The results were published last month and no doubt proved surprising for HMRC. Headline figures included that 75% of respondents stating that they had not even heard of the Criminal Finances Act 2017 and only 32% thinking that the legislation was relevant to them. This is concerning particularly as we know there is increasing HMRC activity focused on the higher risk sectors. We know that there are live CCO investigations and prosecutions are coming, and we have learned lessons from recent and successful Bribery Act prosecutions that look at how organisations have failed to demonstrate they have procedures in place to prevent bribery in their supply chain. We also know that HMRC has also undertaken office raids on premises for CCO, where they ask members of staff what they know about the CCO legislation.

Responding to the legislation

Whatever the size or industry of the organisation, there are some 'quick wins' that will provide some early assurance that you are taking the legislation seriously. We set out below our top five.

1 Begin with a Risk Assessment

HMRC has set out 6 guiding principles to demonstrate a defence. The first of these is the Risk Assessment, and according to HMRC, this is the fundamental first step in building a defence to the legislation. Specifically, for small and medium sized organisations, HMRC states that:

"An SME should first undertake a risk assessment of the products and services it offers, as well as internal systems and client data that might be used to facilitate tax evasion, including by 'sitting at the desk' of employees and other associated persons, considering the motive, means and opportunity for facilitating tax evasion." Put simply, if an organisation has not undertaken a Risk Assessment, it is unlikely to be able to prove a defence of having reasonable prevention procedures in place.

For smaller businesses, the scope of the Risk Assessment will reflect the size and complexity of the business and this could be as simple as a 'rapid CCO health check' to provide an immediate benchmark and a level of assurance. Larger organisations may need to undertake 'deep dive' workshops and analysis.

2 **Other defences**
Having completed the Risk Assessment, it is important to develop an implementation plan to update existing policies and procedures and consider that may not be sufficient to demonstrate a defence of having 'reasonable prevention procedures'. In many cases, your existing processes and procedures for say HR and Finance may be 'fit for purpose' in terms of governance and levels of review, but will need to be updated so that those with responsibility for these areas have an understanding of CCO. Simply adding the word 'tax' to what you have already is not enough!

3 **Communication and training** is definitely a quick win. We believe communication is key and this is both internal (for employees and contractors) and externally (including suppliers, outsourced providers etc). Many organisations are introducing a training programme including classroom training and/or eLearning.

4 It is important to remember it is **tax evasion and not tax avoidance**. However, there is a 'semantic shift' in how HMRC are talking about the two concepts. To be into context, tax evasion is clearly characterised by dishonest behaviours. However, we have been informed that HMRC's position in relation to "aggressive" tax planning is that if implementation clearly fails, there is a risk that this could be considered to be evasion. In other words, if there is something structured to take advantage of a tax relief or exemption and a condition fails it should not fall within CCO but if there is a clearly artificial arrangement which is also poorly implemented, then there is more of a risk. Of course, any transactions based on facts that are false or fraudulent would fall within the scope of the CCO legislation.

5 For all organisations, it is important to demonstrate that there are **CCO policies and procedures** in place signed off by senior management. This would include a Board approved CCO policy, specific CCO communications to Suppliers (for all Associated Persons), Codes of Behaviour to Agent Declarations, formal CCO contractual terms for suppliers and due diligence checklists for suppliers and as part of any M&A.

Whether you are part of a large global group or a smaller entrepreneurial business, responding to the CCO legislation can no longer be delayed. Prosecutions are coming, and whether for yourself or for your clients, it is important to be able to have a 'defence file' in place in case of challenge.

Tourism continues to rise

The latest issue of the UNWTO World Tourism Barometer from the World Tourism Organisation shows that international tourism continued to grow over the first quarter of 2019. Though at a slower rate when compared with the last two years, the 4% increase registered in early 2019 is a very positive sign. The Middle East (+8%) and Asia and the Pacific (+6%) experienced the highest increase in international arrivals. Numbers in both Europe and Africa were up by 4%, and in the Americas growth was recorded at 3%.

"International tourism continues to perform strongly worldwide fuelled by a positive economy, increased air capacity and visa facilitation", said UNWTO Secretary-General, Zurab Pololikashvili. "Growth in arrivals is easing slightly after two years of exceptional results, but the sector continues to outpace the global rate of economic growth."

Europe, the world's largest tourism region, reported solid growth (+4%), led by destinations in Southern and Mediterranean Europe and Central and Eastern Europe (both +5%). Growth in Africa was driven by the ongoing recovery in North Africa (+11%). In the Americas, the Caribbean (+17%) rebounded strongly after weak results in 2018, following the impact of hurricanes Irma and Maria in late 2017. In Asia and the Pacific, results for the first three months showed a 6% increase led by North-East Asia (+9%) and a very solid performance from the Chinese market.

"With this growth comes greater responsibility for translating it into better jobs and better lives", Mr. Pololikashvili stresses. "We need to continue investing in innovation, digital transformation and education so that we can harness the many benefits tourism can bring while at the same time mitigating its impact on the environment and society with a better management of tourism flows."

UNWTO Confidence Index Panel optimistic over future growth

Confidence in global tourism has started to pick up again after slowing down at the end of 2018, according to the latest UNWTO Confidence Index survey. The outlook for the May-August 2019 period, the peak season for many destinations in the Northern hemisphere, is more optimistic than in the recent periods and more than half of respondents are expecting a better performance in the coming four months.

Experts' evaluation of tourism performance in the first four months of 2019 was also rather positive and in line with the expectations expressed at the beginning of that period.

UNWTO forecasts growth of 3% to 4% in international tourist arrivals in 2019.

Easter heatwave is good for drink sales, bad for eating out

The hot Easter weekend delivered starkly different outcomes for Britain's managed pub and restaurant groups, latest figures from the Coffer Peach Business Tracker show. While pub sales surged in the sunshine, restaurants struggled in the heat.

Pub and bar chains reported collective like-for-like sales up 5.3% for the four-day break compared to Easter 2018, with drink-led pubs up a thumping 10.9% as the public headed outdoors.

However, the overall eating and drinking-out market was actually down 3.6% over the four-day weekend, as in stark contrast to pubs restaurant chains saw collective like-for-like sales tumble a massive 18.6% against last Easter's trading.

"You simply can't escape the fact that weather always has a major influence on the fortunes of the pub and restaurant sector - and what's good for pubs is rarely good for restaurants. These Easter figures just underline that reality," said Karl Chessell, director of CGA, the business insight consultancy that produces the Tracker, in partnership with Coffer Group and RSM.

"The Easter weekend last year, which fell in March rather than April, was good for trade overall, and particularly restaurants, as although the weather wasn't stunning, the holiday weekend came in the aftermath of the snow that accompanied the Beast from the East. There was plenty of pent up demand from people wanting to get out, which helped boost sales across the sector by almost 6% against Easter 2017. So although this Easter may have been a bit of a disappointment overall, it was still better than two years ago," added Chessell.

There was better news for the month of April overall, helped by the fact that it contained the Easter period this year. Collective like-for-like sales for the combined managed pub, bar and restaurant sector were up 1.1% on April last year. Pubs and bars were up 2.1%, while restaurant groups reported like-for-like decline of 0.7%.

"Within the pub grouping, drink sales were ahead 2.7%, with food up a more modest 0.8%," observed Chessell.

Mark Sheehan, managing director at Coffer Corporate Leisure, said: "The Easter numbers are difficult to measure because of the contrasting weather year on year and later Easter. The April numbers overall though were down and show the pressure the hospitality sector is under - like many other sectors relying on consumer confidence. Pubs trade well when consumer confidence is low, but the restaurant sector is also affected by the retail woes we are seeing. This could be a difficult summer whilst we have no resolution to Brexit."

"It is no surprise that Britons sought out their local beer garden to escape the record temperatures over the Easter weekend. Whilst the weather and Brexit delay seem to have brought some short-term relief for the UK pub industry, the challenges affecting the casual dining sector show no such let up. Fierce competition from new openings continue to hit top line growth whilst additional costs from increased minimum wage and pension contributions bite into margins. The eating and drinking out sector desperately needs a sustained run of positive sales growth just to stand still," said Paul Newman, head of leisure and hospitality at RSM.

Regionally, London saw a fall in like-for-like trading, down 0.7% on last April, while outside the M25 was up 1.7% on a like-for-like basis for the month.

"Usually London does well over holiday periods, but it appears that the combination of climate change protests, closed railway stations and people heading out of town to seek the sun has taken its toll on London based operators," added Chessell.

Looking at the underlying trends, however, London is still outperforming the rest of the country. Market like-for-likes overall were up 1.7% for the 12 months to the end of April, with London running at 2.5% ahead and outside the M25 up 1.5%.

Total sales across the 50 companies in the Tracker, which include the effect of net new openings since this time last year, were ahead 4.0% compared to last April, showing that although openings have slowed they have not stopped.

Brexit drives prices up

Inflation in the foodservice sector dropped in March from the record high of 9.8% in February, but while increases are less steep than in 2018, prices are continuing to rise. Market instability and Brexit uncertainty will combine to keep prices increasing in the months ahead, according to the Foodservice Price Index from CGA and Prestige Purchasing.

Fish continues to be the most volatile category in terms of price movements. The category sits 34.3% above this time last year and is showing an increase of 10.1% month on month. Fish has hit a record high this month, mostly driven by peaking salmon prices in the run-up to Easter. With good weather this Spring, landings of cod and haddock are set to increase and with reduced salmon demand, we expect to see some easing in this category.

Breads & Cereals has also risen this month, and whilst there is a seasonal trend for price increases in the category at this time of year, poor weather in the US is helping firm prices globally. Significant winter storms and flooding from snowmelt has resulted in substantial losses of corn, wheat and barley. As well as damaging existing stocks, there is the prospect of significant delays to spring plantings, meaning the US may look to more imports, strengthening the grains market as a result.

The largest deflationary movement this month was seen by Fruit, falling 3.6% from February. Spanish citrus recently suffered from flooding, resulting in a climb in the Index from December. Now, cheaper imported produce from Egypt, Turkey and South Africa is being favoured by buyers, leading to the fall we are seeing in this category. Growers' unions in Spain are now taking public action to steer businesses away from buying produce imported from outside Europe, with the aim of reinvigorating a damaged Spanish citrus market.

After the crippling drop in prices seen through 2018, Sugar has gone some way to recovering, with the Index increasing for the last four months. However, the category has fallen again this month, decreasing by 1.8% compared with last month. Abundant global supply of both sugar and cocoa has led commodity prices to fall, resulting in the deflationary movements seen. Since output and export quotas were scrapped in the EU, overproduction has been an issue. In order to combat this, Suedzucker, Europe's largest refiner, has announced plans to shut five plants for the coming season in order to strengthen pricing.

Profits continue tumble

Beware the Ides of March? Maybe Shakespeare had UK's hospitality industry in mind when he wrote the portentous line. That's because profit performance at hotels in the region went from bad to worse in March, as GOPPAR fell for a third consecutive month, despite another successful year-on-year increase in RevPAR. It suggests a further widening of these two measures, according to the latest data tracking full-service hotels from HotStats.

Profit per room at hotels in the UK fell by 0.7% in March to £46.98, contributing to the 1.2% YOY decline in GOPPAR for Q1 2019 to £36.85.

This was in stark contrast to the 1.3% increase in RevPAR for the month, which contributed to the 1.7% increase in RevPAR for Q1 2019.

Non-rooms revenue grew 2.2% YOY to £48.38 per available room, which was equivalent to 36.3% of total revenue and included an increase in revenue in the Food & Beverage (up 3.0%) and Conference & Banqueting (up 5.2%) departments, on a per-available-room basis.

As a result, TRevPAR levels continued their upward trajectory in the month, recording a 1.6% increase to £133.35 and contributing to ongoing growth in this measure, which hit £145.11 in the rolling 12 months to March 2019.

However, the primary cause of the widening between RevPAR and GOPPAR remains rising costs, which this month were led by a 0.4-percentage-point increase in payroll as a percentage of total revenue to 29.3%.

This month, significant YOY cost increases were also recorded in Property & Maintenance expenses (up 6.1%), Sales & Marketing expenses (up 3.8%) and utility costs (up 6.0%).

The growing disparity between top- and bottom-line hotel performance was further illustrated in profit conversion, which fell by 0.8 percentage points YOY.

Profit & Loss Key Performance Indicators - Total UK (in GBP)

March 2019 v. March 2018

RevPAR: +1.3% to £84.97

TRevPAR: +1.6% to £133.35

Payroll %: +0.4 pts. to 29.3%

GOPPAR: -0.7% to £46.98

"The incongruity between gross revenue and operating profit shines a light on the ballooning expenses impacting hoteliers and the struggle to keep them at bay," said Michael Grove, Director of Intelligence and Customer Solutions, EMEA, at HotStats. "Operators will need to find more clever ways to keep costs down in order to turn a profit."

Hotels in Manchester were amongst those to struggle most in March, recording a 5.7% YOY decrease in profit per room for the month to £43.34, which was equivalent to a profit conversion of 36.1% of total revenue.

Hotels in the UK's third largest city were able to save face on total revenue this month, due to a 4.7% increase in non-rooms revenue, which grew to £43.02.

However, the muted movement in total revenue was entirely wiped out by rising costs, which included a 0.7-percentage-point increase in payroll as a percentage of total revenue to 25.1%.

The movement in revenue and costs added to another month of woe for hotels in the city, which have achieved only two months of YOY growth in GOPPAR since March 2018. As a result, profit per room has fallen by 7.2% over the last year to £44.29 in the rolling 12 months to March 2019.

"Supply is challenging performance at hotels in Manchester with approximately 900 rooms added to the market in 2018 and a further 1,200 set to open in 2019," said Grove. "Fortunately, the city has some exciting things to look forward to in 2019, which could boost performance, including a number of fixtures in the ICC Cricket World Cup and the biennial Manchester International Festival."

Profit & Loss Key Performance Indicators - Manchester (in GBP)

March 2019 v. March 2018

RevPAR: -2.4% to £77.19

TRevPAR: +0.0% to £120.21

Payroll %: +0.7 pts. to 25.1%

GOPPAR: -5.7% to £43.34

Leeds had better results, with profit per room increasing by 8.1% YOY, as the feel-good factor continues to permeate throughout the city on the back of a construction boom, buoyed by the arrival of Channel 4 in 2020.

Bottom-line growth this month was driven by an increase in volume and price in the commercial segment, which included an uplift in rate in the Corporate (up 2.8%) and Residential Conference (up 2.3%) sectors.

The growth in the commercial segment contributed to the 5.4% increase in RevPAR, which was the fifth consecutive month of YOY RevPAR growth in the city.

Growth in revenues, in addition to costs savings, led by a 0.6-percentage-point decrease in payroll as a percentage of total revenue, helped hotels in Leeds record a healthy profit conversion of 31.5% of total revenue in the month.

Profit & Loss Key Performance Indicators - Leeds (in GBP)

March 2019 v. March 2018

RevPAR: +5.4% to £60.86

TRevPAR: +5.4% to £106.48

Payroll %: -0.6 pts. to 29.5%

GOPPAR: +8.1% to £33.58

Members' Events

10th June
Keeping your guest data secure - Sponsored by Criton

Event Details
Cyber Security, GDPR, PCI DSS, Strong Authentication - keeping your data safe and secure is no easy task.

Timings: 18:00 - 20:00

Is your data protection officer up to date? Who is responsible for the fine if you have a breach?

Find out what you could be doing and leave with useful tips and some quick-wins to keep you on the right path.

Venue:
Jumeirah Carlton Tower
Cadogan Place, London SW1X 9PY

13th June
Finance Update

Event Details
BDO Finance Update, Breakfast Seminar

Join the HOSPA finance community for a breakfast seminar with BDO at their offices - 55 Baker Street.

BDO will update you on current topical accounting issues under UK GAAP and IFRS. As well as covering the latest developments in tax including corporate taxes, VAT and recent employment tax issues.

Timings: 08:30 - 10:30

Location:
55 Baker Street, London, W1U 7EU

26th June
Scotland Networking Event for Hoteliers with Criton

Event Details
A networking evening with Scottish hoteliers in the luxurious surrounds of the new Kimpton Hotel, Charlotte Square in Edinburgh courtesy of our sponsors Criton.

Venue: Kimpton Hotel, Charlotte Square, Edinburgh

12th September
Commercial and HITEC update sponsored by Keystep

Event Details
The current position - find out where we are with a market review. What are the opportunities and threats ahead?

Learn what happened at HITEC, Minneapolis and hear about the new innovations in the industry.

7th October
In Room Technology - Sponsored by SKY

Event Details
From TVs to voice activated assistance...

What guests actually want... and what they don't want!

Venue:
One Aldwych
1 Aldwych
Westminster
London WC2B 4BZ

Please visit www.HOSPA.org for all registration details and all other events.

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For Further Information please contact Helen Marshall - Helen.marshall@hospa.org

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