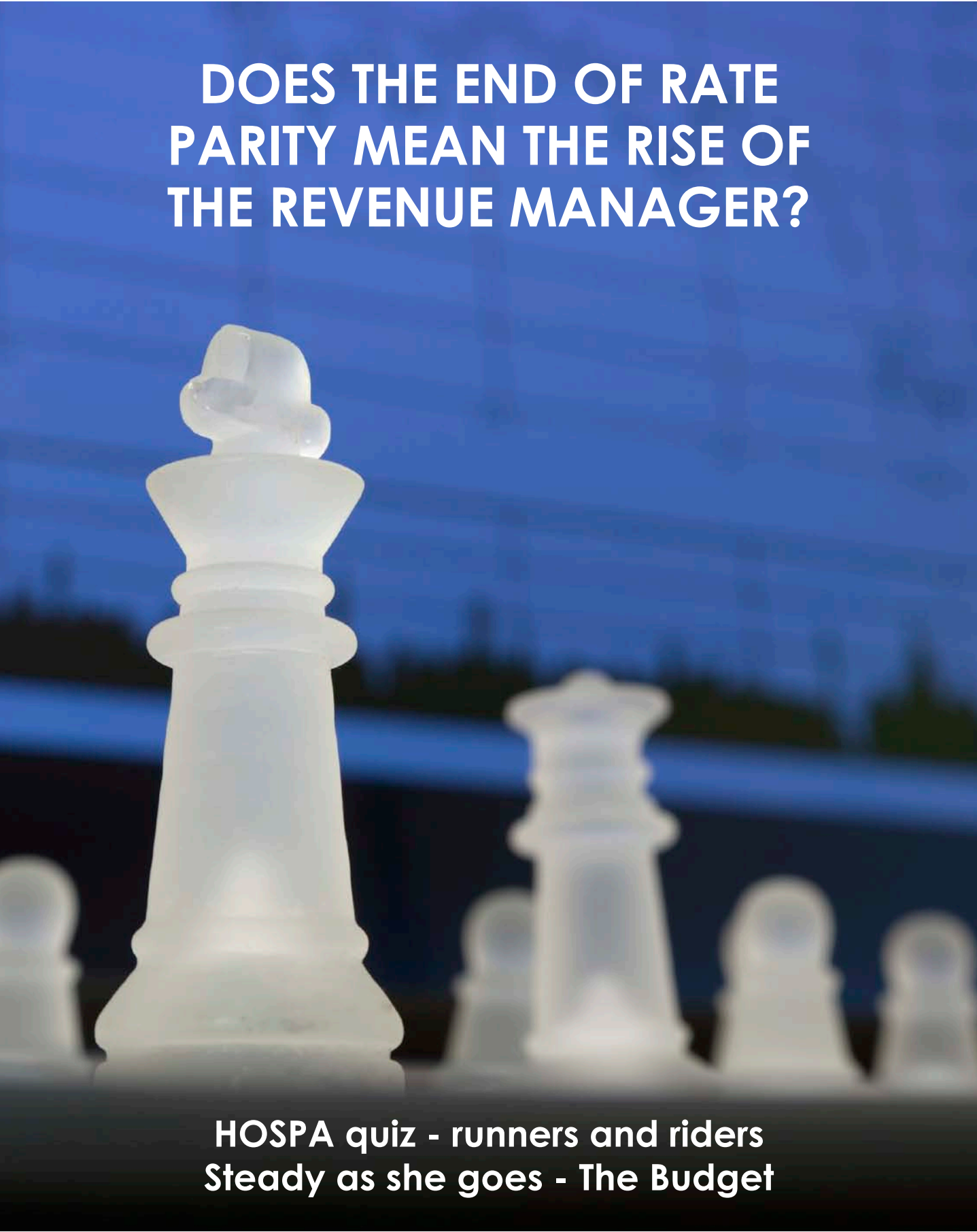


# THE VERVIEW

ISSN 2048-4844 JULY ISSUE 2015

## DOES THE END OF RATE PARITY MEAN THE RISE OF THE REVENUE MANAGER?



HOSPA quiz - runners and riders  
Steady as she goes - The Budget

# Welcome to THE OVERVIEW

Dear members,

Britain has talent, so the story goes and yes, this may initially appear to be in the form of dancing dogs, but it goes deeper. Many of us have done our time behind bars, as 'twere, but usually as a rent-paying move as a student than the starting point for a lifelong career.

The hospitality sector has long fought against that and HOSPA more than most, offering qualifications to help convince employees that they are in credible employment and, importantly, making the work itself more professional and valuable.

There may be some longer-range hope in the evolving nature of work itself. The masses, having realised that there is no longer such a thing as job security, are no longer loyal to a company which will look after them for 40 years then give them a luxurious pension. They know they will have to retrain for different careers and, increasingly, are looking to make those jobs work for them, rather than the other way round.

The rise of outsourcing to freelancers is on the rise, and why not? As an employer, you have only nominal responsibility for their health, wellbeing and taxation and there's no need to provide massive offices for them to lounge around in having endless meetings with endless cups of tea and biscuits. They're happy to lounge around their own living rooms and, if pressed, can be found on Skype.

The beauty of these freelancers is that, unlike the nine-to-five-ers, they are around at random times, providing your venue and your bored staff with companionship and a revenue stream at the downtimes. They might even pick up the odd shift. The 24/7 world is approaching and, for once, the hospitality sector might be the teacher, rather than the student.



*Katherine Doggrell*

Editor | [katherine.doggrell@hospa.org](mailto:katherine.doggrell@hospa.org)

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Hospitality Finance, Revenue and IT Professionals

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Cloud-based hospitality software for hotels, groups, apartments and pub chains



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## Dinner with a takeaway

**HOSPA CEO Carl Weldon reports on the findings from the HOSPA Finance Directors' dinner, sponsored by Barclaycard**

**O**n Wednesday 8th July – in the middle of the London Tube strike – HOSPA hosted a Hospitality Finance Directors Dinner Forum at the Royal Automobile Club on Pall Mall. We were joined by 23 hospitality company FDs and FCs to discuss and debate the 'Future of Payments into 2025'.

We enjoyed an excellent dinner and then Marwan Farah, Head of Barclaycard Business Design, together with Daniel Goodacre,

Barclaycard Business Design Senior Manager, chaired a lively debate with Finance Directors from HOSPA member companies, debating what the future could hold from both a payments and hospitality perspective. After discussing the current rapid pace of change in both industries, the pair shared their view of the future based on the lessons of the past, looking at how the payment form factor, buying channel and payment experience have all evolved over time.



By considering the next steps in these evolutions, a world where the smart use of internal and external data could allow for more tailored customer services – bespoke menu options, wake-up calls aligned to sleep patterns etc, and frictionless payment journey, was discussed. The development of a sharing economy, both for data and assets, might not only create higher customer expectations for service, but also provide new revenue streams for hoteliers – parking spaces for car rental clubs, foyer space for umbrella leasing etc.

Finally the evolution of technology was promoted as a way of improving customer experience – mobile-based access/ payment/loyal apps, outsourcing pre-authorisation and associated risks to ID&V specialists.

As is always the case with these lively discussions we also focused on the specific challenges that hospitality – and particularly hotels – have with credit cards and the fact that the industry is one of the few left that still effectively gives 24 hours of more credit to its customers.

HOSPA member Uwe Haring of Rocco Forte Hotels summarised these challenges in three key areas:

### 1. Third Party charges

These remain a particular problem for the hotel industry, whereby not accepting them may result in lost business and accepting them results in increased risk.

Validation is difficult, as a stolen card data may not be detected, and the card cannot be "swiped", or is not yet reported as stolen. Chip and Pin approval is not possible as the card will not be present at check in. Increase in Data Protection combined with PCI DSS makes the retention and control of the documents even more difficult. Cloud-based solutions remain very expensive in terms of commission.

### 2. Credit Card charge-backs

From a consumer protection side, this is essential, but the card industry remains in the dark ages regarding speed of response from their side, or even the process.

1) They still sometimes require documents by FAX (!) - and will not accept scans.

2) They give the consumer six months to query a charge - but the business only 14 days to respond before automatic charge back occurs.

3) In terms of queries - the codes relating to referral and authorisation are often ambiguous and not clear - and vary by card type.

### 3. New payment processes

As hoteliers, we have always challenges, but it would be helpful if we were involved as part of the steering group for new payment processes to give input.

This is the one of the few businesses where we give credit before the service is given, sometime to the tune of several thousands, and then happily get challenged after that. Maybe we need to change our mind set, and move with the time, however it is not a defined product like an iPad, but a service and experience industry, hoping to match anticipation and perception of guests with our product and delivery.



Other FDs brought out the issue of the investing in the technology that would enable Hospitality to manage this evolution in technology but prove that the ROI is there. In hotels especially we must recognise the trends in payment technologies and try and grasp them for our best use.

The group was also very enthusiastic to a suggestion from Barclaycard that we form a small working party or focus group from the delegates on the evening to provide Barclaycard with input and feedback on behalf of the industry

HOSPA wishes to thanks The Royal Automobile Club for an excellent dinner and service and our appreciation to Barclaycard for sponsoring the event.

If you are a Senior Finance professional in the industry and wish to be invited to events like this then please let us know via the Membership and Events Office.

If you are interested to sponsor and event like this please contact Carl Weldon, HOSPA CEO on [carl.weldon@hospa.org](mailto:carl.weldon@hospa.org)

For more information from Barclaycard please contact [marwan.farah@barclaycard.co.uk](mailto:marwan.farah@barclaycard.co.uk) or [daniel.goodacre@barclaycard.co.uk](mailto:daniel.goodacre@barclaycard.co.uk)





# HOTELS

# VS



# OTAS

## Digital Wars: Survival of the fastest



**Ewa Maliczowska**  
Consultant, Madison Mayfair

In 2015, the battle continues between hotels and OTAs. Hotels and hotel brands are investing in technology to develop more sophisticated digital platforms to compete

with the OTAs. Some in the industry are turning to outside solutions and others are acquiring the companies which have the right expertise. Some players are monetising their capabilities by offering digital services alongside their main business. As the chess pieces move at speed, the OTA giants are responding by doing everything possible to take more and more of the board for themselves. Understanding this fast moving dynamic – and responding to it – is one of the most important management priorities your hospitality business faces today.

### Accor steps into the distribution game

In recent years OTAs have been consolidating on a huge scale. Expedia, Priceline and TripAdvisor have been acquiring smaller companies to boost their digital capabilities and fend off competition. This year alone Expedia acquired Travelocity and Orbitz Worldwide. But now it is not just the OTAs playing the game.

#### Acquisitions

- *Travelocity - acquired by Expedia for \$280m (£177 million) in 2015*
- *Orbitz - acquired by Expedia for \$1.6bn (£1.01bn) in 2015*
- *OpenTable - acquired by Priceline for \$2.6bn (£1.64bn) in 2014*
- *Viator - acquired by TripAdvisor for approx \$200m (£126.34m) in 2014*

In June, Accor blurred the border between hotel brand and OTA by bringing independent hotels onto its booking platform. This is advantageous for Accor which could effectively increase its hotel stock from 3,800 to a whopping 10,000. It's also an amazing opportunity for independents, which get to share the carefully developed platform. This is a clever and strategic development in hotel distribution and turns the heat up significantly on the OTAs.

Accor's decision to open up its booking platform is part of a careful plan. In April, Accor took over FastBooking, which focuses on hotel website development and distribution channel management solutions. FastBooking continues to operate independently but the partnership will undoubtedly enable both companies to develop in the face of OTA pressure. As part of its 'digital transformation' Accor also acquired mobile developer Wipolo in October 2014.



### The Booking Journey

- Leisure travellers use an average of 6.5 “digital touch points” (websites and devices) before booking a trip. (Research by PhoCusWright and Webtrends)
- 41% of travellers research travel using a smartphone or tablet. (Research by PhoCus-Wright and Webtrends)
- 48% of guests will not visit the hotel’s website before arrival. (Research by Mintel Group)
- Over 35% of all adults under 48 use ‘meta-search’ when planning travel (Research by Statistica)

### Clever websites for independents

With OTAs taking the lion’s share of the market, hotels are also turning to third party technology companies who can help give them a competitive edge.

In February, Sabre, a technology provider for the travel and tourism industry, launched website services for hotels. Sabre is headquartered in the US and has revenues of US\$2.5 billion. Sabre claims that the ‘industry-first turnkey website solution [will] help hoteliers increase online conversion and build brand loyalty.’ This would allow the hoteliers to quickly set up a website using a wizard and bypass the process of designing and building a website themselves. It also helps them to be less reliant on OTAs.

At the same time, TripAdvisor has turned up the heat with ‘Instant Booking’: a display of room prices and a ‘view deal’ button that leads to a booking page on an OTA or a hotel website that is distributing the room. Which hotel appears in this section

will depend on whether a hotel is signed up to Instant Booking and pays the right level of commission. This tool is targeted at independents, and would allow them in theory to compete with OTAs and get customers to book directly on their booking platform. However much of the time the OTAs appear to be more likely to show up on the site. Best Western International and Choice Hotels have both signed up to Instant Booking.

### Have OTAs got the ultimate edge?

*“The cornerstone of conversion metrics is abandonment analytics and understanding why it is that visitors to a web site don’t end up booking.”*

*If we look at the performance of a typical hotel’s web site and compare it with the online travel agents; there’s a gulf between the two.*

*Companies like Booking.com spend a lot of time and probably a lot of money in multi variant testing which is the key tool that drives conversion improvement.*

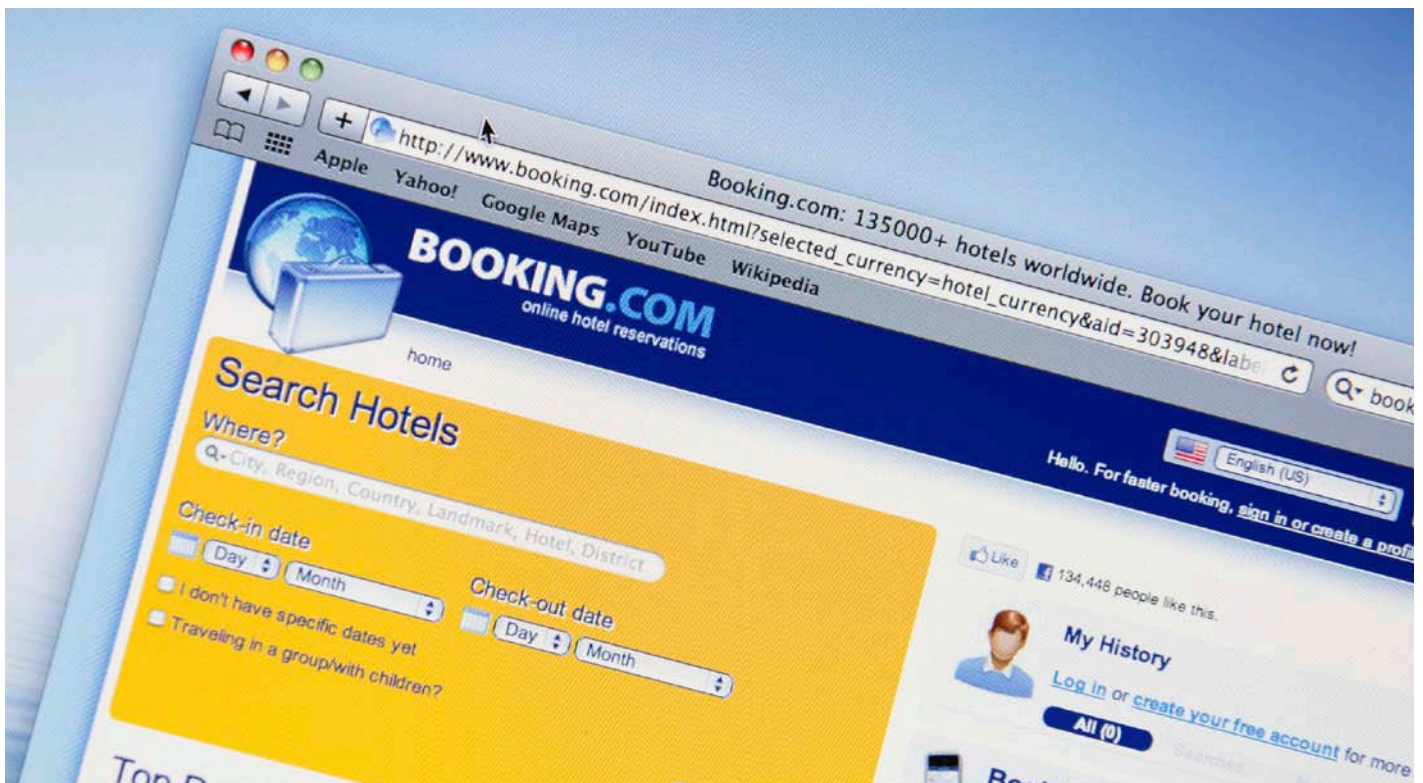
*What happens as a result is that the online travel agents improve their conversion rate and their advertising cost per room night sold decreases.*

*So what they’re able to do is carry out a lot more digital marketing work which tends to be disruptive, and gain an awful lot of OTA market share in that space.*

*Whereas even if you look at some of the leading hotel brands they haven’t caught up from a science perspective.”*

*Brian Reeves, Founder and CEO, Goppar Digital*





## OTA giants expand digital arsenal

Mergers and acquisitions are allowing businesses to recombine services and consolidate brands to their best advantage. Last year Priceline bought web services company Buuteeq, which has now been renamed BookingSuite and is being operated as a unit of Booking.com (a previous Priceline acquisition from 2005).

BookingSuite is now offering web services to help independent hotels build their websites. Whilst there is no charge for this service Booking.com would take a 10% commission from the hotels subsequent bookings. So whilst independents could improve their sites and drive more bookings to their direct platform they would still be strengthening this OTA.

Expedia, OTA superpower and an undisputed technology leader in hospitality continues to add to its armoury. Expedia's acquisition of Orbitz Worldwide brings with it Orbitz Partner Network, which delivers travel technology solutions to some of the world's largest airlines, bank loyalty programs and travel agencies. These acquisitions are clever "plays" – both increasing OTA revenues whilst also ensuring that interesting technology companies are out of the reach of hotel companies.

## How can your business ensure its strength?

The war rages on. More acquisitions will certainly take place. Digital technology will continue to evolve and open up new possibilities for the hospitality industry. It's all moving faster and faster.

To remain competitive, hotel operators need to keep tabs on this fast moving landscape. For most in the industry, OTAs are a necessary and important partner. But increasingly, new technologies, strategic alliances and platforms are within reach. And for those hospitality businesses with reasonable scale and

serious capital, technology acquisitions just might make sense. Don't just "watch this space". Get actively involved.

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Hospitality Finance, Revenue and IT Professionals

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## Rate parity's death knell

**Rate parity has been the bane of the hotel sector since the rise of the online travel agents, but recent activities in Europe have seen it first restricted and now facing outlaw. Katherine Doggrell warns the sector that now it must consider what is next.**

Expedia has announced plans to waive its rate parity clauses for five years after working “closely and constructively” with the European Commission. The news came a week after Booking.com announced similar measures in an attempt to bring the matter to a close in Europe.

From the beginning of August, Expedia will waive its rate, conditions and availability parity clauses with its hotel partners for a period of five years in line with the formal commitments offered by Booking.com and accepted by the national competition authorities in France, Italy and Sweden in April.

The changes apply to all hotel properties in Europe and affect consumers booking via Expedia’s sites worldwide.

Expedia said that, while it maintained that its current rate, conditions and availability parity clauses were lawful and in compliance with competition law, the move was a “positive step

towards facilitating the closure of the open investigations into such clauses on a harmonised pan-European basis”.

It added that the announcement offered hotels and consumers “an effective pan-European solution. The pan-European scope of Expedia’s announcement was also an important contribution to the European Commission’s Digital Single Market objective” and that, to the extent that individual countries’ regulatory or legislative developments may in the future cut across Expedia’s change of commercial policy announced, it reserved “the right to adjust its revised approach as appropriate”.

The news came the week after Booking.com said that, from 1 July it would abandon its price, availability and booking conditions parity provisions with respect to other online travel agencies.

Booking.com will retain its “narrow MFNs” for prices and booking conditions which, it said, would ensure hotels offer the same rates and booking conditions on Booking.com as they do through their own direct website, “in order to ensure Booking.com can continue to be a cost-effective marketing channel for partners and deliver transparency, choice and great prices for consumers”.

Booking.com also talked about a pan-Europe solution,



commenting that it meant that Booking.com's standard terms would be the same for all of its European partners - "helping to build a single European digital economy".

Gillian Tans, president, Booking.com, said: "The commitments agreed with the French, Italian and Swedish NCAs promote competition in a way that supports innovation and investment. We think that all of our European partners and consumers booking at European hotels should benefit from the commitments agreed to with the French, Italian and Swedish NCAs which is why we have decided to amend voluntarily our parity provisions right throughout Europe to be consistent with those commitments.

"We welcome and encourage fair competition and hope that our fellow online travel agencies follow Booking.com's lead as part of a shared commitment to support best pricing for consumers."

With the implementation of the new parity provisions, Booking.com will continue its Best Price Guarantee and match any lower price that may be found on another booking website.

Although Expedia is bringing itself in line with its rival, Booking.com's announcement was not greeted with universal applause by the hotel sector and was criticised by a number of industry bodies, who described it as "anti-competitive" and "a decision to uphold rate parity", with hotels still prohibited from offering discounts on their own websites.

Since Booking.com's move, circumstances have rather overtaken it, with the French National Assembly voting to delete any rate parity clauses in contracts between hoteliers and online travel agents.

The decision was the first legislative move after Booking.com agreed a settlement with the French, Italian and Swedish authorities that was criticised by a number of industry bodies, who described it as "anti-competitive".

Compared to the decision of several competition authorities of 21 April 2015, which only allowed setting prices freely through offline this voted amendment includes online.

Roland Heguy, president, French hotel union, UMIH, said: "It is more than a victory for the profession, it is a revolution that is underway for the French hotel industry and for our customers. After the decision of the Competition Authority, this vote will contribute to the establishment of a renovated contractual framework to restore conditions of a commercial relationship based on trust between hotels and booking sites in the interest of consumer."

Christian de Barrin, CEO, HOTREC, added: "The European hotel industry sees the decision of the French national assembly as a very important step in the process of having complete entrepreneurial freedom available for hoteliers all across Europe. France would be the first country where application of the anti-competitive rate parity clauses would be explicitly declared banished by law and the second country where such clauses would be banned in one way or the other, after the German competition authorities' decision on the matter."

As de Barrin noted, France was not the only country to take action itself against rate parity. In January the Higher Regional Court in



Düsseldorf dismissed HRS's appeal against an earlier decision to ban the portal from requiring hotel to offer it their best available rates.

The German Federal Cartel Office had concluded that these MFN clauses violated German and European competition law. Since March 2014 HRS has not been allowed to apply such clauses in contracts with hotels in Germany.

"By confirming our decision, the Dusseldorf Higher Regional Court has decided on a fundamental issue concerning restrictions of competition in online sales," Andreas Mundt, the FCO's president.

"Best price' clauses are only beneficial to the consumer at first glance because ultimately they restrict competition between the hotel booking platforms. Booking portals which demand lower commission from the hotels cannot offer lower hotel prices. The clauses also make the entry of new platforms to the market more difficult. Consumers therefore benefit directly from the court's decision."

He added that he expected competition between hotel-booking portals to increase and forecast that it would be easier for new booking platforms to break into the market.

The end of 2013 saw the rate parity debate reopened in the UK, after Skyscanner won an appeal over the agreement reached in January 2014 between the Office for Fair Trading and Booking.com, Expedia and InterContinental Hotels Group. The OFT, now the Competition and Markets Authority, has been told to look again at the conclusions it reached after the Competition Appeal Tribunal found that it "acted unfairly".

The time for rate parity will soon be passed, but the question remains over what hotels will do with this new freedom. Booking.com told Agence France-Presse that the end of rate parity might lead to an "exacerbated price war".

Who will win and who will suffer in the cross-fire remains to be seen. Hotels have protested against rate parity for a number of years, but many do not have a strategy in place to cope without defaulting to the OTAs for business. The time for revenue managers to step forward and start making strategic decisions is imminent.



## HOSPA discusses the USALI

**In June the HOSPA Professional Development Committee was delighted to offer a series of one day seminars focusing on current issues for hospitality accounting. This included a workshop exploring the implications and implementation issues arising from the publication of the latest edition of the Uniform System of Accounts for the Lodging Industry (USALI).**

**T**he USALI sets out recommended formats, account headings and cost classifications for the preparation and presentation of financial statements for hotels and related businesses. The first edition was published in 1926 and since then this guide has become the industry standard for best practice reporting. Over the years the USALI has been revised and updated several times with the 11th edition published in June 2014 by the Hotel Association of New York and the

Financial Management Committee of the American Hotel & Lodging Association (AH&LA) with funding from the Hospitality Financial & Technology Professionals (HFTP).

The purpose of the USALI is to provide a uniform accounting system for the hotel industry which enables internal and external users of financial information and statistics to compare the performance of similar properties in the sector. The new edition contains a significant number of revisions which, the authors explain, is a reflection of the need to update due to changes in industry practice and Generally Accepted Accounting Practice (GAAP) and to address issues that have arisen since the previous edition. Full adoption of these changes is required in order to remain compliant with the system and the recommended date for adoption was 1st January 2015.

The workshop, held at the City of London Apex Hotel, featured a group of senior hospitality financial controllers in informed and vigorous discussions on the changes.



These changes in reporting terms, and in some cases methodology, have been incorporated in the following areas of the:

- Summary Operating Statement
- Operating Schedules for specific departments such as Food and Beverage
- Non-Operating Income and Expenses
- Financial Ratios and Operating Metrics
- Financial Statements
- Revenue and Expense Guide

These aspects were discussed as part of the one day seminar which was facilitated by Debra Adams from the HOSPA Professional Development team and Diana Mountain, the outgoing chair of the HOSPA Finance Committee. We were also pleased to welcome international hotel specialist advisor, Howard Field. Howard consulted on the production of the 11th Edition of the USALI and is the author of guides to the USALI 9th and 10th editions entitled 'A Practical Guide to the Uniform System of Accounts for the Hospitality Industry'.

During the day Howard and Diana explained the updates and then the following specific issues and their impacts were debated amongst the group:

- Changing terminology
- Gross and net revenues
- Miscellaneous income
- Service charges and surcharges
- Operating ratios

In particular the impact of the recommendations for service charges and surcharges caused much debate.

It is worth noting that this latest edition of the USALI includes access to Excel templates for all the main reports – all of which are downloadable from publishers [www.ahlei.org](http://www.ahlei.org) following purchase of the text. HOSPA is the UK distributor for the USALI which can be ordered at a member's rate from the Membership and Events Office – see details below.

### Further updates?

In conjunction with the rollout of the 11th edition of the USALI, eCornell presents a video panel discussion, moderated by Cornell Professor, Jan de Roos, which highlights changes and provides guidelines for best accounting practices.

Joining de Roos on the panel is Robert Mandelbaum, Director of Research Information Services for PKF Hospitality Research and Greg Remeikis, partner in CohnReznick Accounting & Auditing practice; co-director of the Mid-Atlantic Hospitality Practice; and a member of the firm's National Hospitality Industry Leadership Committee.

To watch the video from eCornell visit <https://www.youtube.com/watch?v=kE9Oyv-cgOM>.

### Order a copy of the USALI?

A copy of the 11th edition can be purchased from the HOSPA bookshop at <http://www.hospa.org/en/resources/books/>

### When is this seminar available again?

**Tuesday 22nd September 2015**

The one-day course is priced at £250 + VAT per delegate and includes lunch and a copy of the 11th Edition plus 14 days access to the online classroom. The course runs from 9.30am until 4.30pm.

#### Location

Apex City of London Hotel, 1 Seething Lane, London, EC3N 4AX

#### How do I register?

To register your place at this event, please email [education@hospa.org](mailto:education@hospa.org) or call the HOSPA Professional Development team on +44 (0)1202 889430.

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## Steady as she goes BDO reacts to the Budget

**The hotel sector has performed well so far in 2015. In recent years, this success has been limited to the London market so it is pleasing to see this spread out to the rest of the UK. The sector was hoping that the Chancellor would provide some stability to the general economy and minimise any fallout from the problems in Greece.**

**T**he Chancellor started by announcing that economic stability was his main priority however the sector will be less pleased with some of the specific policies.

The theme was lower taxation and less welfare dependence. The sting in the tail for businesses is that they are expected to fund part of the welfare reduction through the increase in the minimum wage. This will now be called the national living wage and will increase from £6.50 to £7.20 an hour next April, and then to £9 an hour by 2020. This will increase the cost base of almost all hotel businesses. This will be partly offset by the increase of the national insurance employment allowance from £2,000 to £3,000 and by the reduction in corporation tax rates.

Another rather disappointing announcement was on the annual investment allowance. Although the Chancellor trumpeted the “permanent” increase to £200,000, this was a little disingenuous as the rate is currently £500,000 and was previously £250,000,

albeit it was due to drop back to £25,000 on 1 January 2016. The consolation is that the rate is now fixed for the life of this parliament.

On a more positive note, corporation tax rates will fall to 19% from 1 April 2017, and then again to 18% from 1 April 2020. This provides welcome certainty for the sector by setting the rates in advance, and also achieves the Chancellor’s aim of making the UK a highly competitive regime in which to do business.

### Other announcements were as follows:

- As trailed in the Conservative manifesto, the level of pension relief will be scaled back for those on incomes over £150,000. This measure will be introduced from April 2016. However, there may be opportunities to maximise the use of reliefs in the run up to the changes. The long term cost of

the current tax relief arrangements for pensions and the rate of pension saving is a major concern for the Government so it has launched a wide ranging consultation entitled 'Strengthening the incentive to save'. This is the start of long process to build a sustainable pension system and it is unlikely we will see further changes for several years.

- There will be additional inheritance tax relief where the family home is passed down on death to direct descendants. This additional relief will start at £100,000 in 2017/18 eventually increasing to £175,000 in 2020/21, and the promised uprating of the nil rate band from 2017/18 will now not take place, instead it will remain at £325,000 until 2020/21.
- Major changes are planned for non-UK domiciled individuals, who will now be deemed to be domiciled in the UK for tax purposes if they have been here for 15 years out of the last 20. In addition, it will no longer be possible for somebody who is born in the UK to parents who are UK domiciled to claim non-domicile status if they leave but then return and take up residence in the UK.
- Companies with annual taxable profits of £20m or more will have to make corporation tax payments more quickly for accounting periods starting on or after 1 April 2017. They will be required to pay four months earlier than at present. This will make the calculations inherently less accurate as the final payments will have to be made before the year end.
- The dividend tax credit will be abolished from April 2016 and a new dividend tax allowance of £5,000 a year introduced. At the same time, the rates of tax on dividends in excess of that limit will change to 7.5% for basic rate taxpayers, 32.5% for higher rate taxpayers and 38.1% for additional rate taxpayers. This will mean that companies will no longer be required to show tax credits on their dividend vouchers.
- An anti-avoidance measure was introduced with immediate effect to prevent corporation tax relief being obtained on acquisitions of goodwill and customer related intangible assets. This will influence how hotel deals are structured in the future.

The British Hospitality Association was also underwhelmed by the Budget, with Ufi Ibrahim, CEO, commenting: "Hospitality and tourism created one in five jobs in the last Parliament and is the fourth biggest industry in employment terms but there is more we can achieve with further support from the Chancellor. As an industry employing a large number of individuals earning more than national minimum wage and less than the proposed living wage, we have tried to have a constructive dialogue with HM Treasury on building towards the living wage without job losses. We were very surprised the Chancellor made this announcement without consultation. Despite the Chancellor trying to alleviate the pain with adjustments to corporation tax and employment allowances, these changes do not go far enough to reduce the impact on SMEs and mitigate potential job losses across the industry.

"On top of all these new pressures, our industry is at a serious disadvantage with other European countries where tourism VAT is on average 10%. We call upon the Government to lower



VAT on accommodation and attractions to 5% to increase our market's competitiveness and reduce costs to working families. A cut to tourism VAT could supercharge the economy with over £20 billion in foreign exchange earnings and domestic spending over the next 10 years.

"While we are analysing the potential impact of the Chancellor's announcement, constructive dialogue with HM Treasury is now imperative to identify measures to counterbalance the Government's ambitious agenda with the realities of running a high service and very low margin business."

Jon Hubbard, Head of Investor Services for Hotels & Hospitality at JLL, added: "There is an even stronger case for the government to improve competitiveness in the fourth largest sector, tourism and hospitality with the pace of future economic growth in the UK coming under increased focus. Reducing the level of VAT on hospitality will ensure that businesses in the sector can compete on a level playing field with most other countries across Europe. It is illogical for the government to saddle UK visitors, both domestic and overseas, with VAT which is more than double that paid in most European countries.

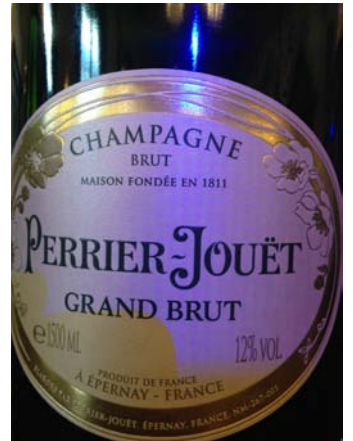
"We are firmly behind the Cut Tourism VAT Campaign, promoted by the British Hospitality Association, which has wide support across the industry. Cutting tourism VAT in the UK to 5% has broad benefits and it is time that the government recognised the importance of the sector to the UK economy, both in providing jobs and attracting overseas spending.

"Coupled with welcome steps towards relaxing the Visa requirements for Chinese visitors, to make the UK as easy to access as the rest of Europe, that the government will hopefully place a greater focus on the economic benefits of the UK's tourism and hospitality offering."

With the sector seemingly passed over for preferential treatment from the Chancellor, it was have to continue to paddle its own canoe and prove its worth to a country where immigration changes will rob it of the cheap labour which has kept it buoyant so far.



## → HOSPA QUIZ



## CONGRATULATIONS TO HOSPA QUIZ WINNERS ROOMNET TV

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5 HEADS ARE BETTER THAN 1

This year's HOSPA quiz night moved venues from its usual pink paradise to the rather more salubrious Brown's on St Martin's Lane, where those who had battled successfully against the Tube and First Great Western strikes enjoyed 10 challenging rounds, all in a former court room.

Details from the night remain limited to protect the innocent (and because this correspondent could only stay long enough to enjoy the free drinks voucher before getting the last train out of dodge). Many congratulations to the winners, Quiz Team Aguilera and many thanks to the other teams.





## Four ways hotels can cater to 2015's food trends

Food is one of the top considerations when a traveller chooses a holiday destination. And while there may be restaurants within walking distance from where they're staying, naturally you would want your guests to eat where they sleep.





## But how do you encourage them to dine in?

Increasingly, head chefs are finding that they need to keep their menus in a state of constant flux to keep customers engaged with their restaurants. With almost everyone claiming to be a 'foodie' these days, menus need to be creative and food needs to keep up with people's changing tastes in order to capture customers.

Here are a few of the current trends shaking up the food and beverage service industry.

### 1. Keep it fresh and healthy

Over the last fifteen years, fresh foods, particularly produce like meat, poultry, fruit and vegetables are becoming more of a focus, particularly with the younger generations (Gen Z and Millennials) now moving into the consumer market.

The 2015 diner expects fresh, well-prepared dishes that are handcrafted like art. They even expect your pizza bases, breads, chips, ice creams and cakes to have been freshly baked or fried in your kitchen, and they can tell when your fish, pastry, kebab wraps or naan breads come from a frozen pack. For hotel restaurants, that means emphasising seasonal produce, house-made ingredients and made-to-order specialties.

Why the obsession with fresh? The Institute of Food Technologists reports that 87% of consumers equate fresher food with healthier food. Health-conscious hotel guests are less interested in processed foods and animal products. Low fat has been overtaken by organic options, superfoods, raw food, the Paleo diet and plant-based alternatives. Many diners expect each meal to have a high nutrient density from ancient super ingredients like greens, vegetables and berries, along with fruits and proteins. Consider adding on-trend ingredients like kale, coconut water, coconut oil, chia seeds, quinoa, kaniwa, amaranth and root vegetables (the more deformed, the better) to your recipes to cater for health-conscious diners.

### 2. Experiment with interesting techniques and hybrid flavours

In 2015, restaurateurs are finding that having experimental options on the menu is essential for keeping customers engaged, enthused, coming back for more and telling all their friends.

Adventurous diners enjoy international flavours from countries such as Tunisia, Portugal and Japan, and regions like Southeast Asia and the Mediterranean. Borrow rare preparation techniques from these places, such as fermenting, pickling, smoking and cooking in cast iron, as well as spicy sauces such as aji, yuzu, harissa, gochujang, peri peri, savoury jams, nut butters and togarashi.

Experimentation also means manipulating classic flavours into new, hybrid forms. Unexpected fusions are occurring between recipes and cuisines – think ramen burgers, cronuts, waffle tacos, and 'Japanese, Brazilian and Peruvian' restaurants. This type of customised food development allows for innovative flavour combinations and highly specialised experiences for the consumer.

It doesn't have to be difficult to opt in to this trend. The humble pizza is one of those dishes that's easy to customise and market to foodies who are looking for new experiences within the dining world. Almost anything goes, and the likes of bone marrow, peaches, apple, lemon slices and clams have all made their way into toppings.

Also on the rise is the presence of craft beer and things like low BAC cocktails, often focussing on unique flavour combinations, allowing diners the chance to taste something completely out of the ordinary. New arrivals such as Japanese Whiskeys and Cuban Rums are further shaking up the landscape offering exciting pre- or post-dinner drink options.

### 3. Downsize for solo diners and busy travellers

The restaurant reservations site 'Dimmi' recently reported an 83 per cent rise in one-person bookings, measured over the last financial year. This was nearly double the increase in business overall. While many hotels offer single room options for solo travellers, they often neglect making their enticements to eat in the hotel solo-friendly. It's best to modify your "get the second meal free" deals, and consider offers that entice solo diners, such as 25% off their meal, a voucher for their next stay, or a free breakfast for sharing a photo of their meal on social media with a hashtag of your restaurant name.

Solo travellers – and those travelling with others – are also having busier trips, whether because they're visiting on business or simply seeking adventure. These active guests seek healthy snack-sized meals that they can eat quickly or take on the road. So have a rethink about your snack menu, in-room options and even your bar menu. Smaller servings and takeaway options can be a great addition.

#### 4. Add a dash of tech

Now that you're keeping up with the trends, how do you let diners know? If you haven't yet launched an app for your hotel, you could design one to help guests book their tables or order room and poolside services with just a few taps on their mobile devices. And to attract diners who are searching restaurant and food review apps for new venues and discounts, claim your listing on these popular apps to boost exposure for your on-site restaurants and cafes.

Indeed, a big part of the current culinary landscape focuses on the intersection of technology and food. Restaurant and hotel consulting company Baum+Whiteman predicts that incorporating new technologies within food production and service processes will have the biggest influence on how hotels operate in the immediate future.

This can include what is referred to as 'guest facing' technologies: mediums that allow diners to take a direct approach to being in control of their dining experience. Many restaurants are finding that increased user control over the ordering and reordering processes are allowing more time for waiters and food service professionals to provide a more personalised service.

#### Give travellers another reason to stay with you

There's a lot going on in the world of food, and with food strongly influencing people's decisions of where to travel to, making it a feature of your hotel provides them with just one more reason to stay with you – and to stay inside the hotel more. In fact, if you're keeping up with these four food trends, your guests may never even need to leave the hotel.

With a background in retail and over 14 years of management experience, Catering on the Move founder Adam Pope is passionate about his businesses and his clients.



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## XN appoints VP

**Xn Hotel Systems Group Limited is delighted to announce the forthcoming appointment of Emmanuel Clavé, former Group Information Technology Director of Rocco Forte Hotels.**

With a wealth of hotel, restaurant and hospitality industry IT operations experience spanning over 30 years, Emmanuel will be joining the group in October 2015, in the position of Vice President. Concurrently with his appointment, and as part of the group's strategy to establish a local presence in all the mainstream hotel markets worldwide, Xn is also pleased to announce it will open a new office in Dubai.

**Greg Spicer, Chief Executive of Xn Hotel Systems Group, commented:**

"We are delighted to welcome Emmanuel to Xn Hotel Systems. Having worked closely with him for more than a decade as a key client, we have come to know Emmanuel as a leading industry professional who achieves results by identifying and delivering innovative and cost effective solutions. We are confident that his tremendous depth of hotel industry IT operations experience, will greatly enhance the services and applications we provide to our global client base. "

### **Mobile Guest Applications and Analytics Division**

As a key part of his role, Emmanuel will spearhead a new, strategic product division which will focus on the development and delivery of integrated, Mobile Guest applications and Big Data analytics solutions, complementary to the core PMS, CRS, POS and Leisure systems that Xn provides to the global hotel market.

Based from the new Xn office in Dubai, Emmanuel will also be responsible for the group's activities in the Gulf Coast and India region.

Prior to joining Rocco Forte Hotels Emmanuel worked for Hilton Hotels and Thistle Hotels. He is a Board Member of the Hotel Technology Next Generation industry association and whilst he will have to resign his position following his departure from Rocco Forte Hotels, he will continue to work actively with HTNG representing Xn Hotel Systems.

**Greg Spicer further commented:**

We are also very excited to be expanding our geographic reach, with the opening of our tenth company office in Dubai, planned for October. The hotel and hospitality industry is seeking a new generation provider of innovative, mobile, cloud-based applications, so it is important, both for current clients and for our strategic growth, that we establish a local presence in this rapidly growing regional market. We also look forward to the opportunity to working closely with the protel hotelsoftware office in Dubai, our strategic partner for property management systems."

**Emmanuel Clavé commented:**

"I am excited about the prospect of joining Xn Hotel Systems and the new challenge of working with a vendor. I know from first-hand experience that Xn has a great set of products and I am looking forward to being able to contribute to future product development, particularly in the very important area of Mobile and Analytics".



## West Midlands hotel market continues to shine

**Once again the UK Provinces led the way to profit growth with positive year-on-year movements during the month of May in gross operating profit per available room (GOPPAR). West Midlands hoteliers experienced a 4.7% increase in this metric while London hoteliers registered a decline, according to the latest data from HotStats.**

West Midlands hotels recorded surges in occupancy of 1.0 percentage points to 69.5% and in average room rate (ARR) of 2.5% to £72.03, leading to a rooms revenue per available room (RevPAR) growth of 4.0% to £50.09. A closer look into the rooms department shows a 19.2% increase to £5.03 in travel agency commission per available room compared to the same period last year. This means that of the £1.95 gain in RevPAR, £0.81 or 41.5% of the increase was paid away to third party intermediaries.

But mixed performances were recorded in ancillary departments and total revenue per available room (TRevPAR) levels were softened to a rise of 2.8% to £102.05. At the same time, hoteliers managed to reduce payroll to 31.8% from 32.5%, and as a result departmental profit per available room (DOPPAR) went up by 3.0%. Despite overheads per available room increasing by 1.0%, GOPPAR hiked by 4.7% to £31.07.

In May, notwithstanding a 6.5% increase in RevPAR Brighton hotels suffered a decline in GOPPAR levels of 6.4%, according to the latest data from HotStats. A surge in demand of 3.7

percentage points with a 1.5% increase in ARR delivered the RevPAR growth compared to the same period last year. However, a general decrease in non-rooms revenue per available room from meeting room hire (-26.2%), food (-5.8%) and beverage (-2.3%) led TRevPAR levels to rise by only 0.9% to £123.11. Hoteliers' payroll costs increased by 0.9 percentage points, and a 12.8% surge in overheads per available room further impacted the GOPPAR decline of 6.4% to £46.05, representing a gross operating profit conversion of 37.4% for the month.

Nottingham hoteliers experienced an uplift in revenues with both RevPAR and TRevPAR going up by 2.8% and 2.6% respectively, according to the latest data from HotStats. However, this increase did not translate into the bottom-line performance during the month of May, as GOPPAR remained stable at £23.00.

Hotels in the city recorded a growth in ARR of 4.4% at the expense of occupancy going down by 1.0 percentage points, resulting in RevPAR jumping to £43.25. Mixed performances in ancillary departments contributed to a TRevPAR rise of 2.6% to £77.89 compared to the same period last year. On the other hand, payroll costs grew by 1.0 percentage point and negated the revenue increases, and a 2.2% surge in overheads per available room further impacted profitability levels resulting in GOPPAR stagnating for the month.



## The month of May 2015

	May'15	May'14	Var b/w	
WEST MIDLANDS	Occ %	69.5	68.5	1.0
	ARR	72.03	70.25	2.5%
	RevPAR	50.09	48.14	4.0%
	TRevPAR	102.05	99.29	2.8%
	Payroll %	31.8	32.4	0.6
	GOP PAR	31.07	29.66	4.7%
BRIGHTON	Occ %	79.1	75.4	3.7
	ARR	103.07	101.58	1.5%
	RevPAR	81.53	76.57	6.5%
	TRevPAR	123.11	122.03	0.9%
	Payroll %	26.8	25.9	-0.9
	GOP PAR	46.05	49.22	-6.4%
NOTTINGHAM	Occ %	71.0	72.0	-1.0
	ARR	60.91	58.36	4.4%
	RevPAR	43.25	42.05	2.8%
	TRevPAR	77.89	75.93	2.6%
	Payroll %	31.9	30.9	-1.0
	GOP PAR	23.00	22.99	0.0%

## The Calendar year to May 2015

	YTD'15	YTD'14	Var b/w	
WEST MIDLANDS	Occ %	67.3	65.2	2.1
	ARR	73.51	70.24	4.6%
	RevPAR	49.44	45.77	8.0%
	TRevPAR	96.99	91.38	6.1%
	Payroll %	33.0	34.0	1.0
	GOP PAR	27.21	23.71	14.8%
BRIGHTON	Occ %	66.0	66.6	-0.7
	ARR	93.59	91.54	2.2%
	RevPAR	61.74	60.99	1.2%
	TRevPAR	97.04	99.04	-2.0%
	Payroll %	32.3	30.4	-2.0
	GOP PAR	28.11	30.15	-6.8%
NOTTINGHAM	Occ %	68.3	64.6	3.7
	ARR	60.32	56.56	6.6%
	RevPAR	41.21	36.53	12.8%
	TRevPAR	74.44	68.27	9.0%
	Payroll %	32.9	33.8	0.9
	GOP PAR	19.43	16.57	17.3%

## The twelve months to May 2015

	Rolling'15	Rolling'14	Var b/w	
WEST MIDLANDS	Occ %	69.5	67.0	2.5
	ARR	71.77	68.26	5.1%
	RevPAR	49.90	45.77	9.0%
	TRevPAR	101.10	94.02	7.5%
	Payroll %	32.0	32.8	0.8
	GOP PAR	30.09	26.23	14.7%
BRIGHTON	Occ %	71.3	71.7	-0.4
	ARR	96.69	91.25	6.0%
	RevPAR	68.92	65.43	5.3%
	TRevPAR	109.25	106.77	2.3%
	Payroll %	29.2	29.1	0.0
	GOP PAR	38.67	35.76	8.2%
NOTTINGHAM	Occ %	70.4	67.4	3.0
	ARR	59.50	55.96	6.3%
	RevPAR	41.92	37.72	11.1%
	TRevPAR	76.61	71.47	7.2%
	Payroll %	32.0	32.8	0.6
	GOP PAR	20.69	18.63	11.1%

**Average Room Rate (ARR)** - Is the total bedroom revenue for the period divided by the total bedrooms occupied during the period.

**Room Revpar (RevPAR)** - Is the total bedroom revenue for the period divided by the total available rooms during the period.

**Total Revpar (TRevPAR)** - Is the combined total of all revenues divided by the total available rooms during the period.

**Payroll %** - Is the payroll for all hotels in the sample as a percentage of total revenue.

**GOPPAR** - Is the Total Gross Operating Profit for the period divided by the total available rooms during the period.

**For more information please:**

call +44 (0) 20 7892 2222  
email [enquiries@hotstats.com](mailto:enquiries@hotstats.com)  
visit [www.hotstats.com](http://www.hotstats.com)  
or follow us on Twitter and LinkedIn



# Members' Events **Forthcoming events**

## **20th and 21st September** **Independent Hotel Show 2015**

**Location:** *Olympia West, Olympia Exhibition Centre*

The Independent Hotel Show returns to Olympia this October (20 & 21) with a packed two days of networking, new business ideas, advice and insight from some of the UK's leading figures from the luxury, boutique and independent hotel sector.

### **Exceptional Exhibitors**

Discover the finest products and service providers with a carefully selected line-up of over 300 premium exhibitors from across the hotel supply chain. Offering a one-stop-shop of all the essentials needed to run a successful hotel, The Independent Hotel Show is the must-attend event for anyone working within the boutique and luxury hotel sector.

## **21st September** **Cost Control for F&B Operations**

**Time:** 9.30am until 4.30pm

Cost Control for F&B Operations is designed for all those involved with the management of food and beverage operations, from head chefs to food and beverage controllers. No prior knowledge of finance and accounting is required.

### **What is this course about?**

This one day course has the purpose of assisting businesses with the effective management and control of food costs, staffing costs and menu pricing; all of which have a direct impact on profitability. Taking a practical approach, the course is highly interactive and uses a series of worked examples, case studies and discussions.

### **Divided into seven key topic areas, the course covers:**

- Best practice in purchasing and stock control
- Menu planning, standard costing and gross profit management
- Impact of sales mix
- Wage and salary scheduling control
- KPI's for food and beverage control
- Break-even analysis for F&B outlets
- Action plans for profit improvement

### **What does it cost?**

This one-day course is priced at £250 + VAT per delegate and includes lunch and course notes, plus 14 days access to the online classroom. The course runs from 9.30am until 4.30pm.

### **How do I register?**

To register your place at this event, please email [jane.scott@hospa.org](mailto:jane.scott@hospa.org) or call the Professional Development team on +44 (0)1202 889430.

## **22nd September** **Hospitality Reporting & the Uniform System of Accounts**

'Hospitality Reporting and the USALI' has been designed for hospitality finance professionals whose role includes the preparation of internal accounts for control and strategic decision making.

### **What is the course about?**

The objective of this one-day course is to guide hospitality finance professionals through the range of revisions in the new edition of the USALI, which include updates on the following topics:

- Summary Operating Statement
- Operating Schedules
- Food and Beverage Department
- Non-Operating Income and Expenses
- Financial Ratios and Operating Metrics
- Financial Statements
- Revenue and Expense Guide

These revisions are a reflection of the need to update due to changes in industry practice and Generally Accepted Accounting Practice. The publishers of the revised USALI state that to remain in compliance with the latest edition reporting changes should be in place by January 2015.

### **What will participants gain?**

On completion of the course, delegates will be equipped with the know-how to be able to:

- Prepare financial statements to industry standard
- Understand, interpret and prepare financial reports
- Remain in compliance with the Uniform System.

### **What does it cost?**

This one-day course is priced at £250 + VAT per delegate and includes lunch and course notes, plus 14 days access to the online classroom. The course runs from 9.30am until 4.30pm.

To register your place at this event, please email [jane.scott@hospa.org](mailto:jane.scott@hospa.org) or call the Professional Development team on +44 (0)1202 889430.

**HOSPACE 2015**  
**26th November**  
**Sofitel London Heathrow**

**HOSPACE**   
Conference & Exhibition 2015

HOSPACE is an annual conference and exhibition hosted by HOSPA which is the UK's leading educational organisation for Professionals involved in Financial Management, Revenue Management and IT within the hospitality industry.

Highlights will be a line-up of top hospitality industry experts

for the Leaders Pane and cross community debates. In addition, delegates will be able to benefit from HOSPACE's popular highly topical programme of hospitality industry specific education workshops - all led by top specialists in their subjects.

As in past years, HOSPACE will be supported by a growing and increasingly influential exhibition of hospitality technology solutions – providing delegates with a 'one stop shop' to view and interact with the latest and 'best in class' technologies – covering all eventualities for any hospitality business, whether they be start-up, established independent, or multi chain-owned, operations. For further information, please visit [www.hospace.org](http://www.hospace.org).

## Members Meetings

**14th Sept** - IT and Finance Community Event - London

**12th Oct** - Industry Update - Birmingham

**20th Oct** - Update on Tax and Accounting - London

**9th Nov** - Industry Update - Manchester

**26th Nov** - HOSPACE

**17th Dec** - Annual Awards Lunch - London

To book please contact [jenny.rose@hospa.org](mailto:jenny.rose@hospa.org)

## Quiz

**17 Sep - HOSPA Regional Quiz Night**

**Location: Radisson Blu, Glasgow**

**From 6.00pm**

The event starts from 6.00pm on 17th September for a light meal, drinks and networking with the quick fire quiz rounds starting at 7.00pm prompt. There will be a magnum of Champagne for the winning team and various other prizes!

Cost: £15.00 per person (includes a complimentary drink and finger food) with teams of up to 6 allowed (prices are

inclusive of VAT). Individual bookings are also accepted and will be placed together on a team.

This is one of the highlights of the HOSPA social calendar so book today to avoid disappointment - teams are limited!

To book individually or book your team of 6 please download and complete the booking form; <http://hospa.org/static/uploads/bookingformglasgowquiznight.pdf> and send back to Jenny Rose; [jenny.rose@hospa.org](mailto:jenny.rose@hospa.org)

This is a general pub quiz (not hospitality focused) and will include questions such as: *Vodka, Galliano and orange juice are used to make which classic cocktail?*

We hope to see you there!

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STR Global  
Verteda  
XN Hotel Systems

### HOSPA Partners

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HFTP (Hospitality Finance and Technology Professionals)  
Hotel Marketing Association  
Hotel Technology Next Generation  
Smart Report

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Watson, Farley & Williams

# Hospitality Conference & Technology Exhibition

**HOSPA is a Community of Professionals** - Promoting the highest professional standards in financial, Revenue and IT management in the hospitality industry.

The Conference is an industry leading set of speakers and topics relevant for today's Hoteliers.

HOSPACE is also home to an Industry Specialist Technology Solutions Exhibition – covering all aspects of your Hospitality business.

## Conference Highlights:

**Leaders' Panel** – A line up of Hospitality Leaders and Senior Executives looking at and debating the current issues and trends affecting the industry today.

**HOSPA Spotlight Sessions** – two major Panels of industry experts and practitioners examining key topics of the day – including open question time from delegates and Social media channels.

## Workshop and Technical Updates

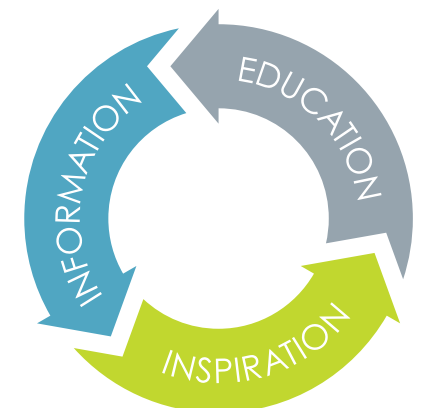
## Who should attend this event?

- Senior Hospitality Business Directors
- Hospitality IT Professionals
- Financial Controllers and Accountants
- Revenue and Distribution Managers
- General and Commercial Managers
- Young aspiring employees wanting to develop their skills & meet with industry specialists

And all those interested in keeping up to date on innovations and trends in the hospitality sector and mixing with the experts!

**Early Bird Pricing available until 7th September.**

 Follow us on Twitter @HOSPAtweets for all the latest news on HOSPACE.



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