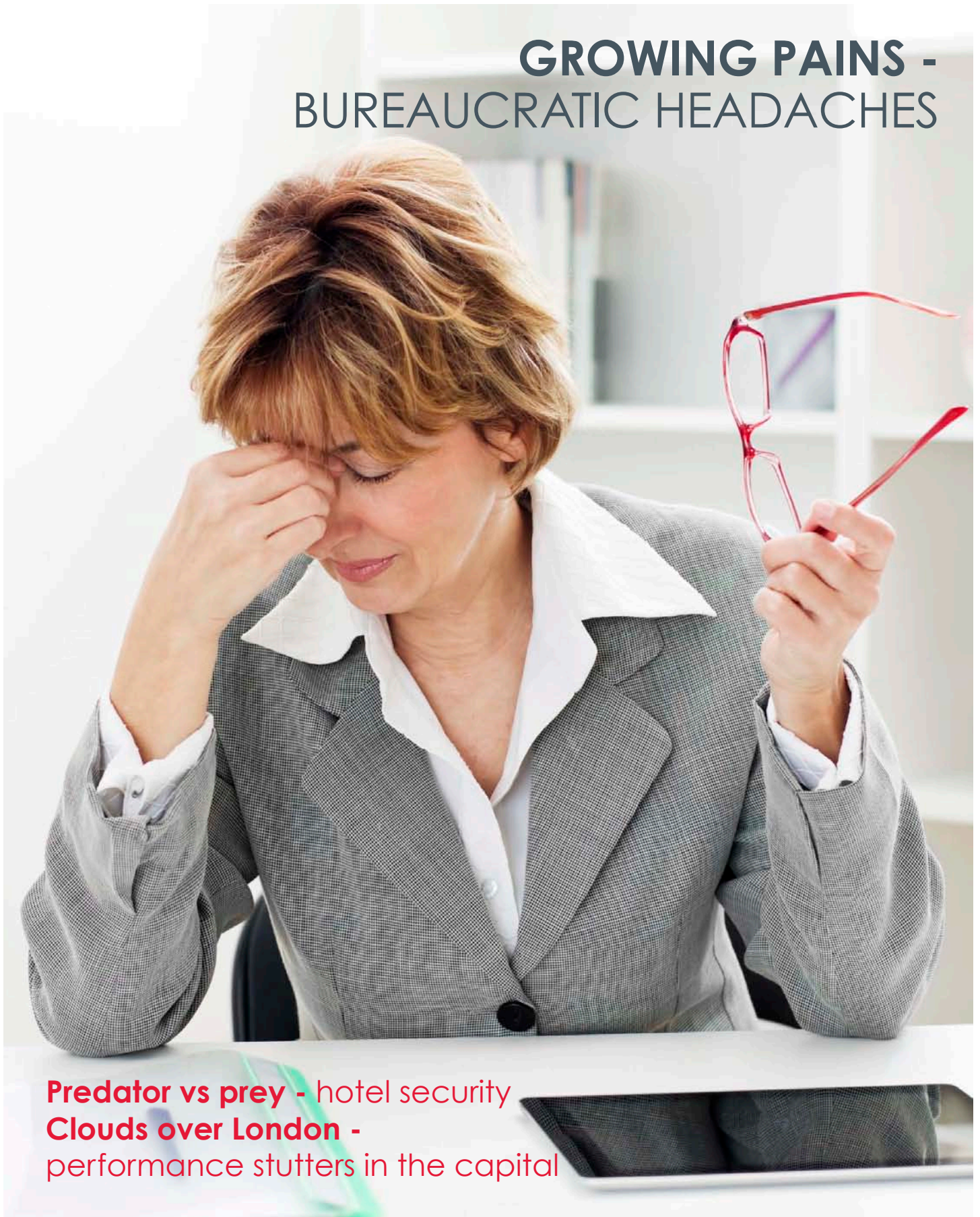


THE OVERVIEW

ISSN 2048-4844 AUGUST ISSUE 2015

GROWING PAINS - BUREAUCRATIC HEADACHES



Predator vs prey - hotel security
Clouds over London -
performance stutters in the capital

Welcome to THE OVERVIEW

Dear members,

Oh, to be an employer. Never invited to the pub after work. Probably the recipient of an unfortunate nic-name. Having to come up with a snazzy company logo. To be in power is, inevitably, to be left out of the office love, no matter how fair, cheery and providing of free lattes you are.

And, despite providing work for the many and tax income for the few, things are only going to get worse. Adding to the 3am debates about growth and cash flow are an ever-growing festival of bureaucratic worries, which must be negotiated to avoid, in the worst case, prosecution.

In this issue, Howard Field navigates the minefield which is tips and service charges. With a certain High Street restaurant chain being accused of levying an 'admin charge' on processing staff tips, confusion has been reigning strong and Unite, amongst others, has been threatening boycotts on venues which have had a trying summer already, exacerbated in the capital by Underground and some overground rail strikes.

Elsewhere in this issue Selima debates the arrival of the National Living Wage, with a goal of reaching £9 by 2020. The NLW (you may know it as the minimum wage, as applied to the under-25s) has the laudable goal of attempting to cut poverty, but there are those who fear that it will largely be funded by cutting employment. Sweetening the deal, the Chancellor announced a reduction in the headline rate of corporation tax to 19% next year and 18% by 2020.

David Brookes, Tax Partner at BDO, commenting on the Chancellor's 2015 Summer Budget, described the introduction of the national living wage as likely to have "a significant impact on small businesses".

For a sector which relies on small businesses for innovation, another headache at 3am could infect us all.



Katherine Doggrell

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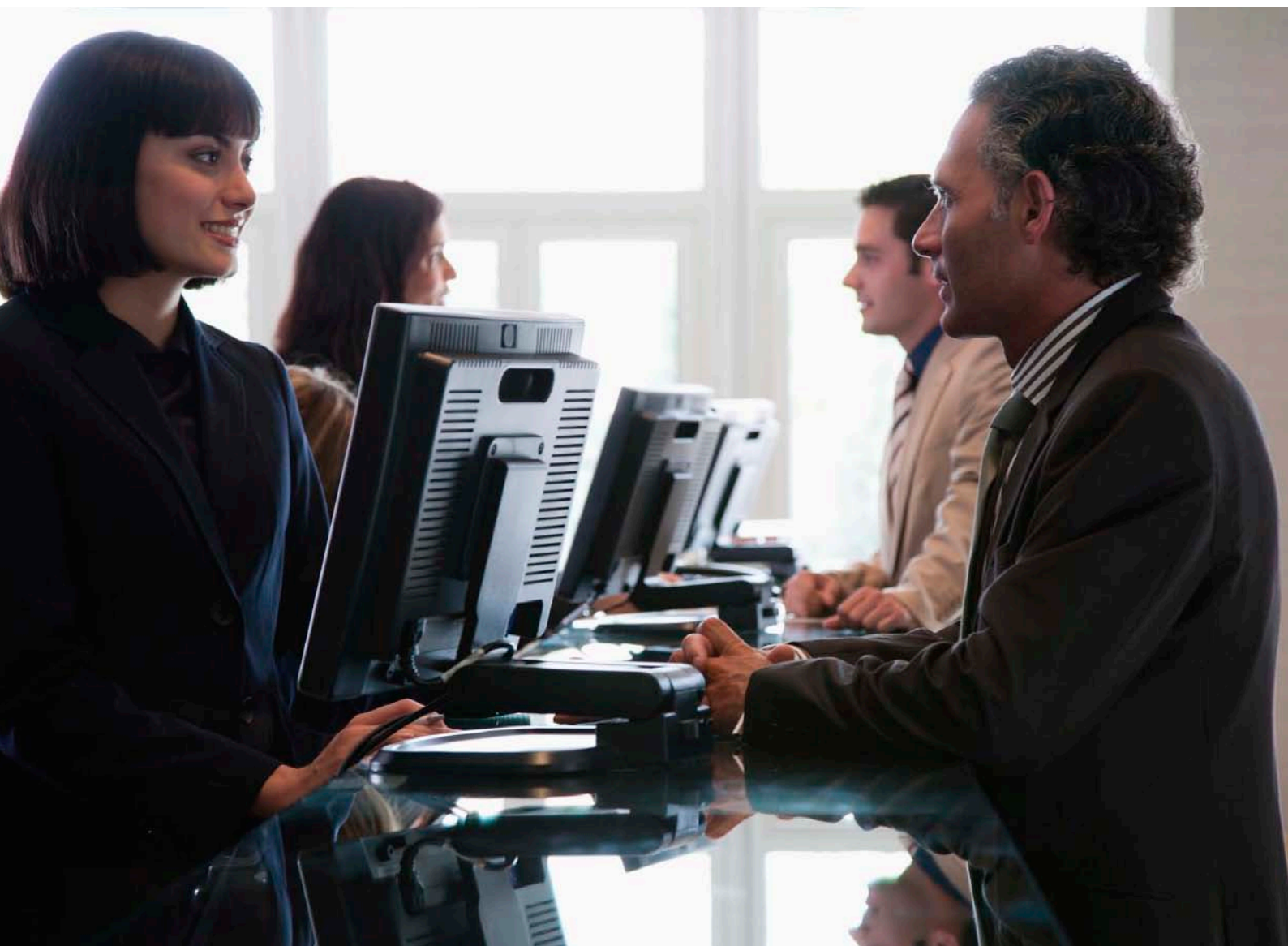
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Service without a smile

HOSPA CEO Carl Weldon puts the case that good service can mean no service at all.

I recently met with a very senior executive running parts of a major technology business turning over circa £5 billion in the UK and we chatted about technology and service in the hospitality and hotel business.

This gentleman travelled a fair amount around the world and is a member of a number of loyalty programmes, with all his 'preferences' well noted. But for all of this he has recently 'cut loose' from some of his usual hotels due to "too much attention". His comments to me ranged as follows:

1. *Too much fuss upon check in – do I really want to be highlighted at front-desk? And then do I want to wait while the manager is called to say hello to me? Sometimes you just want to get in and get straight your room*

2. *Quick access to plain TV news channels works for me*

3. *I don't always want an upgrade*

4. *Despite the attention, specific requests can still be ignored*

5. *The Wi-Fi should 'just work'*

6. *As a business traveller, in-room facilities such as the desk and lamp are important to me*

7. *I need easy access charging points or plugs*

8. *Room service can be expensive and slow and if (say) the football is on – allow for the increase in demand on room service*

9. *However – if I travel and arrive with the family and at a weekend – all this changes*

This from a modern, technology-aware traveller, who was capable of moving hotels to get what he wanted.

It struck me again on how important two key facilities are – the Wi-Fi and the TV – price but also quality.

Quality, in particular quality of service, is now seeing a shift, with more hotels, particularly in the branded sector, putting the power in the hands of the guests in the form of apps. These allow the guest (commonly the loyalty programme member) to check in, obtain a room number and enter their room, all without ever dealing with the front desk or touching a key-card. This has been stepped up a gear with the Apple Watch, allowing the guest to glide past front desk with nothing more than a knowing nod of the head. If that.

There is a case that the new wearable tech such as watches and bands – being separate from the actual Smartphone – will probably create a sea-change for the check-in process much more than the Smartphones themselves. There are indeed many guest apps available to independent hotels and chains providing control via their own apps such as Premier Hub. Wearable connected tech will reduce in price taken up by younger travellers who will demand facilities and access to services for them.

The debate is starting across the world and in the UK - I will be chairing a debate at the Independent Hotel Show in October

(where we will have a HOSPA Hub for those members visiting) where the topic is “The threshold of minimal tech” where we will explore today's absolute tech essentials, how technology can help provide more meaningful experiences as well as debating when tech is too tech.

Sometimes in the industry we can be too extreme – going either over-the-top both with our service and attention and with technology which does not work properly or adds a layer of complexity.

There will always be room for low or no tech – but probably more likely in a more leisure and relaxed product or market. But not for the regular business traveller. Room guests are again different to dining-guests – primarily due to the amount of time in the facility so I do believe that restaurants have a different challenge to hotels where those extra facilities and hardware need to work and work well.

So – let's get with the programme, as they say in the US. Don't lose your guests as a result of too much fuss – give them what they actually want – which sometimes may be a degree of anonymity.

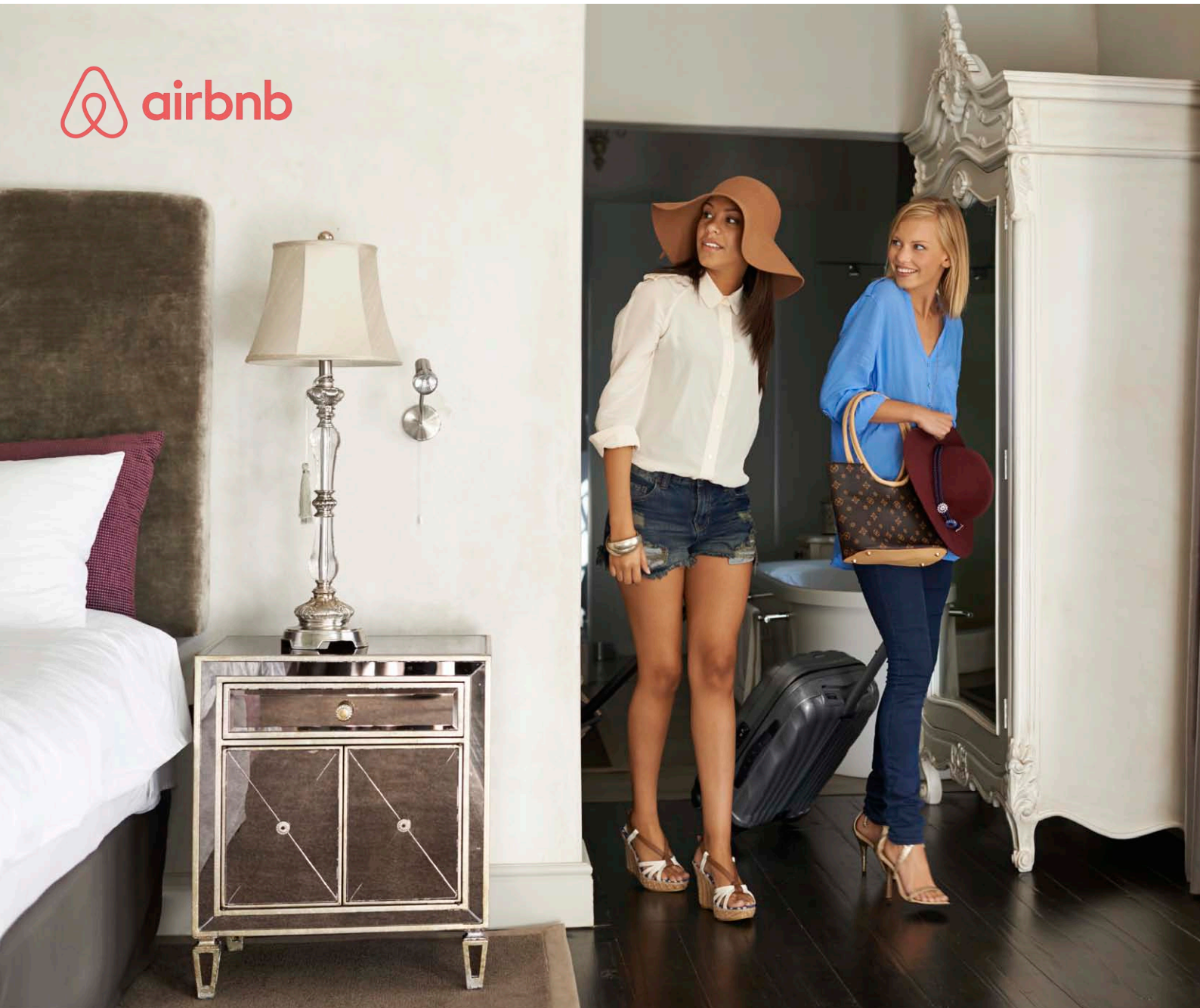
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Responding to the Airbnb ‘threat’



Ewa Maliczowska
Consultant, Madison Mayfair

Airbnb has had sweeping success since its launch in 2008, quickly becoming a poster-child of the sharing economy, with revenues many hotel groups would do anything to achieve. Airbnb has displayed an understanding of the highly connected digital world in which we live, and hits directly at the new ways in which people connect and communicate. On the other hand, hotel operators can call on valuable knowledge, experience, and people on the ground. So what should hoteliers do to combat any erosion of their business by Airbnb?

Know what you are up against

Airbnb's model is simple: Build one engaging digital platform, embrace the sharing economy and quickly build a portfolio of properties with next to no capital outlay. Then watch it grow! Airbnb targets the millennial generation whom hotels need to win over in order to remain successful into the future. Millennials are fast becoming the consumer group which matters most, given their immense numbers and the way they buy goods and services. Airbnb has targeted other market segments, but the millennials were the first to discover the platform, and they clearly relish the boutique experiences on offer.

Airbnb also has the distinct advantage of very few overheads. By comparison with a hotel, which pays for staff, goods and services, property related costs and much more; Airbnb owns no property, has only a handful of staff, and can reach any city on the planet via its digital platform, which is basically a website with a fantastic database behind it. That means it can move very fast, while hotels are restricted by the natural inertia of hierarchy, structure and sheer size.

Hotels therefore need to think in new ways and must do everything possible to maximise their existing assets, staff, technology, services, spas, restaurants etc., whilst individualising the hotel to create unique boutique-like experiences and remain sufficiently attractive.

Unique experiences and individualisation

Consumers have become demanding and expectations are high. People are now looking for “something unexpected”. They seek quality touches that make them feel special and valued. Hoteliers need to work out how to satisfy this demand. This usually requires a reasonable amount of flexibility in how each hotel in a group might operate.

Hoteliers must put additional thought into every aspect of their operation, asking the question “how can we make this truly unique”? How they are presenting their rooms and how they are welcoming their guests. The food that they serve and the events that they host. The local environment and how the hotel is reflecting and interacting with it. No part of the business should escape close inspection.

There may also be ways for hotels to attract local customers to spend time on site. Health clubs, meeting facilities, exciting restaurant and bar concepts. These are all areas where an operator like Airbnb struggles to make any ground. They are also services not usually associated with Airbnb's catalogue of private homes and rooms for rent.

Mama Shelter, developed originally by Servotel and now part owned by Aqua, is one hotel product where the ground floor is designed to act as a social hub in the neighbourhood.

“There was always a door, and a doormat, and somewhat of a membrane that separates the hotel from its immediate environment. What we're going to see now is that membrane will become more and more and more transparent, and much more fluid, and will welcome the outside environment into it”

Omer Isvan, President, Servotel

Differentiate with best in breed technology

Technology is a real focus for today's consumer, and ironically this is one area where hotels may simply have the advantage. The handover of the keys from property owner to guest in an Airbnb trip can potentially take some organisation and would be worked out differently by each host. But a hotel group can make the leap with technology, allowing guests to check in or even open their door from their smartphone. In the last few months alone, the up front cost of some of these technologies has plummeted. If hotel operators invest in putting this kind of technology at the core of their offering, they can stand out as the impressive option for the consumer.

Hotels can also develop clever partnerships with technology companies to continuously evolve their offering, and come up with exciting new plans.

Also, with technology comes data and insight. The way guests are interacting with technology in hotels can be monitored by the operator, helping them to understand their customer better and gain further advantage.

Cardola provides mobile applications for hotels.

“The benefit is, having all of that information in one place. So there's only one place you need to go to order your room service or find out information and it being in the language of choice and being able to update in real time, it's dynamic. Those are the benefits and the quirkiness is going to come as it's evolved. I mean, it is still a relatively young space. You know, 2010 the iPad, Smartphones have only been around for a single digit number of years, so there's a long way to go before I think we reach the true zenith of where this is going to end up.”

Paul West, CTO, Cardola

Great service is what hotels do best

One immense advantage hotels have over Airbnb is the staff: in many cases long serving, well trained staff who are there to do everything they can to please the guest.

Putting staff at the sharp end of the accommodation experience and empowering them to make decisions will add to the boutique feel of the hotel experience. Service is at the absolute core of hospitality and this can be leveraged to the maximum to get guests to visit, encourage others to do so, and return in the future.

Staff interactions with guests can have a deep emotional impact to personalise their experience of the brand. In an Airbnb situation however, the host is most often absent from the property for the duration of the stay, which is a critical disadvantage. Hotel staff are there to serve the guest, they can give a friendly welcome to those entering the hotel, solve their problems, and help them learn whatever they need to about the neighbouring area and the hotel itself. And they must be available most of the time – as guests often need help at unexpected times. This is a difference that should be celebrated. For some people, having a problem resolved quickly and effectively by helpful hotel staff is as important as how stylish the décor is.

"Fundamentally the experience with staff and interaction with staff is driving review scores. One of the interesting things about that is, this is something that you can train on, and that you can teach people about."

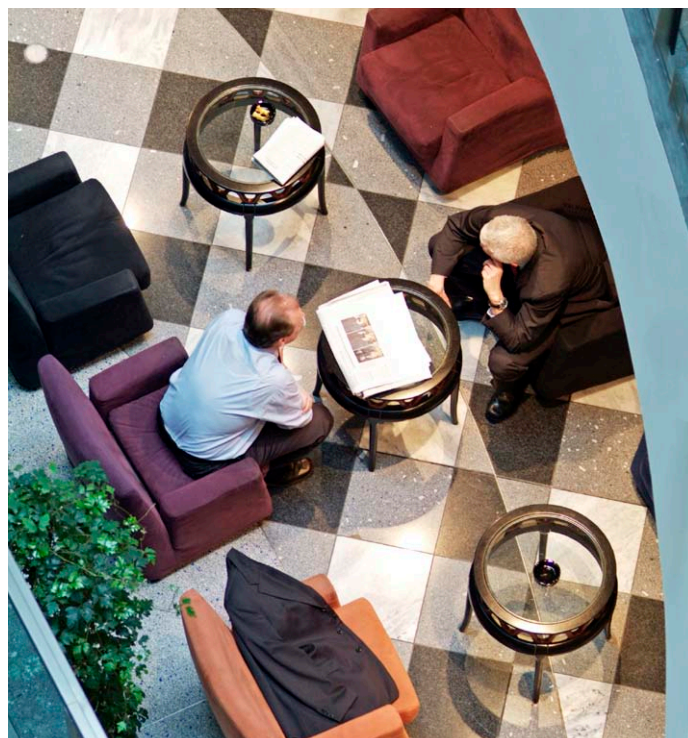
Jakob Riegger, COO, TrustYou

Better for business – but is that all?

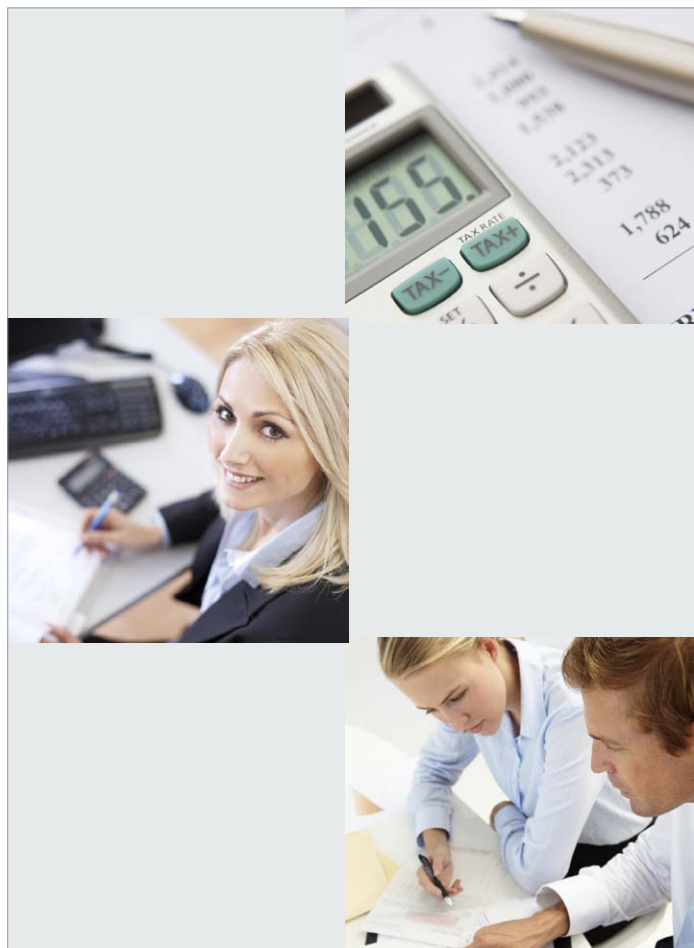
It's relatively clear that Airbnb is less well suited to people who are travelling for business. While some business travellers use Airbnb, many of the amenities a business traveller routinely needs are not necessarily within easy reach when staying in someone's private home. It is therefore advisable that hotels ensure that they have a strong business offering, catering to that sizeable market.

At the same time, are there other customer segments where hotels can deliver spectacularly and Airbnb can't get close? These might include weddings, child-friendly holidays, luxury packages and more. The key is to ensure that, whatever the hotel is doing, it is sufficiently difficult for a service like Airbnb to match.

A dose of healthy competition will drive significant development. Airbnb's model is strong because of its steely focus on distribution, and the fact that much of what it does for consumers is achieved via a single website. It has been able to build up an impressive catalogue of accommodation, some of which is at a high standard, but keep its costs very low indeed.



In the face of this challenge (and others like it), a hotel which doesn't make serious changes will be at a huge disadvantage. But the good news is that there is plenty which can be done. Competition, especially from a disruptive source, can be unsettling. But it is also healthy. It enables hoteliers to rethink their business, ask difficult questions, inspire their staff and ultimately excite the customer.



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Exponential-e announces Gold Sponsorship of HOSPA



British Cloud and Network provider, Exponential-e, has announced it is to become a sponsor of HOSPA.

To meet the rising technological demands of today's hotel guests, Exponential-e will become a Gold Sponsor of HOSPA. Under the arrangement, HOSPA will offer its members access to Exponential-e's uncontended, superfast 100 Gig Ethernet network, enabling hotels across the UK to have the infrastructure in place to deliver connected guest experiences.

Carl Weldon, Chief Executive of HOSPA, said of the partnership: "We are delighted to welcome Exponential-e to our association as a Gold Sponsor. They are a company that will add to the breadth of options and technical services offered to our members via the HOSPA Solutions Showcase."

"A decent Wi-Fi connection is now one of the most important facilities for hotel guests and it as much of a differentiator as a clean bed or the location," said Lee Wade, CEO, Exponential-e. "By becoming a gold sponsor of HOSPA, we have the opportunity to ensure hotel guests can be connected at all times. Having worked with hospitality organisations to improve their network and Cloud infrastructures since our inception in 2002, we are well placed to help the UK's hotels confidently upgrade IT services with a trusted industry partner."

Exponential-e's uncontended, private 100Gig Ethernet Network is used by over 200 hotels across the UK, servicing over 40,000 rooms. Ideally designed for hotels looking to offer visitors secure and advanced technological capabilities, the Exponential-e network enables hospitality and leisure venues to optimise the connectivity services for guests, to deliver business-class internet with built-in cloud and voice services. In addition, since all services are delivered down a single piece of fibre, Exponential-e's bespoke and flexible network packages means turning services on-and-off, or scaling them, is simple and practically instantaneous.

"We chose Exponential-e for its unique network, which gives us greater flexibility than other traditional options available on the market today," said Andrew Thombs, Atlas Hotels. "Our hotels can now ensure the best possible quality of connection for visitors through the separation of guest and corporate traffic, and we can also quickly scale our resources up or down as required for specific guest requirements."

"We have peace of mind knowing Exponential-e's network is both PCI and ISO27001 tested and secure, which supports our reputation for excellence in our field as the UK's biggest franchisee of the Holiday Inn Express brand. We now use Exponential-e for the majority of our 46 sites, and the company's service and support has been integral to helping our significant expansion over the past year," concluded Thombs.

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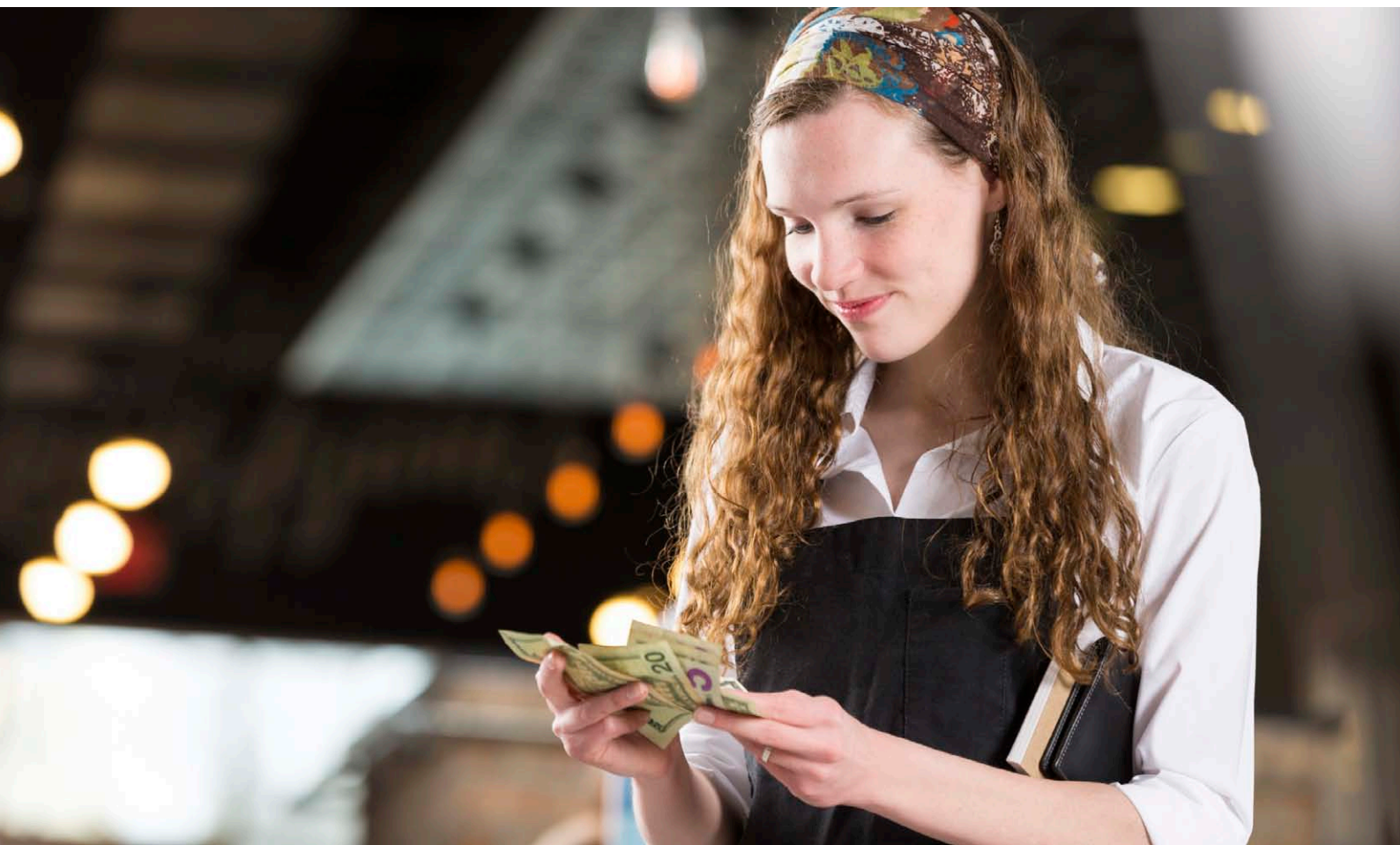
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The Tips and Service Charges Accounting Issue - Can It Get Any Messier?

Just before setting out to discuss in this article the accounting standard change for Service Charge following the publication of the latest edition of the Uniform System of Accounts for the Lodging Industry, a news item appeared that stated that a major Union is campaigning against the withholding by a restaurant group of a percentage of amounts distributed to staff to cover credit card fees, payroll and processing costs.

This once again focuses on the muddle created by the UK hotel and restaurant businesses and how tips and service charges are thoroughly confused as to what they represent and how they are handled.

So, here are some considered views in an attempt to provide a way forward.

Tips and Service Charges are NOT the same thing.

Why not?

A tip (or gratuity) arises when a customer wishes to reward the

staff involved in providing the service over and above the charge stated on their bill. Paid by cash, addition to a cheque, or by adding an amount to the bill that is charged to a credit or debit card (or a room or credit account at the hotel or restaurant), this will be an amount decided on entirely by the customer and directed to go to the staff involved.

Contrast this to a service charge - where there is a charge flagged on the menu or tariff list, that is included on the bill presented to the customer, the amount of which is determined by the hotel or restaurant, and the use of the amount received by the business is under its control.

If these distinctions are accepted, then a reasoned discussion of the issues can follow.

How should Tips be handled?

It is generally the practice that all tips are passed to the staff, either by being paid to individuals or through a pool shared among the staff.

The law states that those tips that are added to cheque payments or to bills charged to credit or debit cards and credit accounts belong to the business. However the accepted practice is that these tips are passed back to the staff.

Accounting standards do not require tips received to be treated by the hotel or restaurant as revenue or their receipt by the staff to be treated as part of their pay from the business.

How should Service Charges be handled?

Service charge income by law belongs to the business. The use of this source of income is entirely at the discretion of the business.

Some businesses opt to pass the service charge income to staff, but there is no obligation for them to do this. Whether such distributions are for all or part of the income, and to which staff they are made, will depend on the arrangements that form part of the employment practices of the business.

Accounting standards point towards the whole of the service charge income forming part of the income of the business, and any distribution to staff being accounted for a part of their payroll cost.

Where costs such as credit card commissions, administration costs, and items such as breakages or bad debts are reflected in the amounts distributed by hotels and restaurants, accounting standards provide that these or any other costs are reflected in full and that they are not reduced by allocations from the service charge income.

What about the VAT and payroll treatments ?

UK VAT, income tax and National Insurance treatments affect the costs of these transactions to the customer, the staff and the business.

These influence decisions about whether or not to apply a service charge or leave tipping to the customer, and how the income is distributed.

Use of the term 'discretionary' as applied to service charges on customer bills allows for this income to be free of VAT.

For amounts paid through the payroll controlled by the business, income tax and National Insurance costs apply. Implementation of distribution systems controlled by the staff that qualify as 'troncs' enable employees and employers to save the National Insurance costs.

Tips that go directly to the staff are subject to income tax as part of their earned income, whether they account for them personally or they are paid through an approved tronc scheme.

The new auto-enrolment pension contributions from employers and employees also do not apply to payments the staff receive via troncs.

However, these various tax treatments do not override the choices available to the hotel or restaurant as to whether or not to levy service charges from their customers, how they deal with the income so generated, and how to structure pay and any distributions within the terms of employment they offer.

Where does that leave these matters?

Employers have to ensure that they are paying at least the statutory minimum wages out of income of the business before accounting for any service charge income. They also need to provide terms that are market competitive to attract staff, and they are free to determine how to reward performance within their payment structures.

It is also important that if the option is made to apply service charges, it is clear to customers that there is a charge, how much it will be and why it is included. This needs also to be clear to the staff.

The challenge for hotels and restaurants is to distinguish between charges that are needed to cover the costs of the business to provide the product and service they say they offer, and giving customers the opportunity to recognise and reward staff with an extra payment where they have received an exceptional experience.

Mixing tips with service charges just confuses the message. The wide variation in practices in UK hotels and restaurants of how these are handled by them and their staff adds to the confusion.

What then should be the accounting standard for Service Charge?

There is a strong case for UK hotels and restaurants to get their houses in order sooner rather than later in regards to this issue.

The Uniform System refers to 'mandatory' service charges as being included in revenue. It is contended that describing the payment of service charge as discretionary does not change the principle of how this revenue should be treated. The fact is that the charge is raised by the hotel or restaurant and when received it legally belongs to the business, and it is up to the business to determine how it is used.

The standard for hotels provides that both the revenue and the costs of any distribution to staff are reflected in full in the operating statements.

Doesn't it therefore make sense for this to be the adopted standard in the UK?



Howard Field

NOTE There are many issues involved in discussion of the subject of accounting for tips and service charges. You may have differing views on what is proposed in this article. HOSPA would like to know what you think should be the industry's approach to arriving at a recommended standard. [Please send your thoughts to Katherine.doggrell@hospa.org]



The National Living Wage: Lessen the Impact on Your Business

On the 8th July 2015, George Osborne announced a new National Living Wage. Commenting that “Britain deserves a pay rise,” the Chancellor revealed plans to increase the minimum wage to £7.20 per hour, with a longer term goal of reaching £9 per hour by 2020.

For Finance and HR Directors, this news immediately raises questions over the business impact of these higher wage costs. In such austere times the focus on cash flow, the bottom line and keeping business finance healthy has never been greater. Add to this, the issue of keeping staff happy and motivated under the increased pressure of tightening the belt, and the concerns become very real indeed.

So what do business leaders really need to know about the Chancellor’s scheme?

- The new National Living Wage will increase the minimum wage from £6.50 per hour, to £7.20. This has been put forward as a means of tackling poverty, working towards a 5 year plan of creating a “higher wage, lower tax, lower welfare country.” By 2020, the goal is to reach a £9 per hour.
- This new scheme will affect workers aged 25 and over only, coming into practice in April 2016. Planned as a step by step process from October 2015, the current minimum wage for over 21’s is set

to increase by 20p per hour from £6.50 to £6.70. The argument for the focus on over 25’s is that the priority for younger people is simply to get valuable work experience in a paid job.

- Effectively the National Living Wage is a rebrand of the minimum wage for over 25’s. The name was taken from the Living Wage Foundation, an organisation actively involved in advising on UK pay levels. In effect, the National Minimum Wage will still exist. The National Living Wage is a new addition as a top-up

gesture for 25's and over. Critics have argued the name is misleading, as the National Living Wage isn't based on living costs.

- The changes are set to boost the income of around 6 million people across the UK, as minimum wages for the over 25's increase by 70p an hour, or 50p per hour from October. Overall, a further 3.25 million people may benefit with minimum wage enhancements across the board for those aged 18-20, 16-17, and apprentices. Plus, the accommodation offset has been raised.

- At the same time, it's been predicted that over 60,000 people will lose their jobs as a direct result as companies struggle to keep afloat in light of increasing wage costs. In response, George Osborne has forecasted that 1.1 million new jobs will be created as a direct result to the new budget, which mitigates the loss on a UK scale.

The Real Business Impact

George Osborne has openly recognised that these changes could have dire consequences for businesses. His solution? To offer a lower corporation tax of 18%, contrasted to the current 20%. In addition, to boost the employment allowance for small companies to £3,000, which is an impressive 50% rise. Despite this, many business leaders and owners remain sceptical. In a report by KPMG using a macroeconomic model favoured by HM Revenue and Customs, they suggested that the National Living Wage would be partly funded by reduced employment. This could have a decidedly negative impact on staff morale and business productivity.

With one fifth of UK employees working for small companies with no more than nine workers, the National Living Wage is estimated by this same model to cost them £2.4bn.

Taking an objective look at both sides of the argument, businesses that have already implemented the new wage for over 25's have reported higher level of staff motivation, lower absenteeism and reduced turnover, which presents a more hopeful picture. On the other hand, with KPMG's investigations in mind, the costs of paying the National Living Wage in more labour intensive industries could have negative consequences for companies, and their staff.

The Domino Effect



The other factor to bear in mind is the impact the National Living Wage will have on pay structure. For instance, early adopters have commented that supervisors are now on the same pay as the rest of their team. The only fair solution is to look at wage increases for people with more responsibility. Already, the stress of such actions across the employment chain can be imagined, with wage costs rising across the business as employers struggle to pay staff according to experience and maintain morale.

Who Will be the Hardest Hit?

Essentially, the businesses set to feel the economic impact the most are those reliant on part-time workers and people on minimum wage.

Labour intensive sectors like hospitality, manufacturing, the care sector and smaller retailers are some of the types of companies likely to experience the biggest repercussions.

Spokespeople from these sectors have voiced their concerns over the sudden pay rise. In the Financial Times, Ufi Ibrahim of the British Hospitality Association commented that job losses are a worry, with the corporation tax and employment allowance incentives bringing small comfort to businesses within the sector.

The Key Question - Who will be paying for the wage increase?

In light of a stretched economy and set austerity, one of the big questions left widely unanswered is where the money will come from to supplement the new National Living Wage. It's been predicted that £12.4bn is needed to finance the salary increase.

Turning once again to KPMG's report, the potential answers fall into five categories.

The Employee

We already know 60,000 jobs could be at risk. These job cuts may tie directly into the plan to fund the new wage. As companies strive to keep their salary costs in check, redundancies are possible and retained workers may lose out on bonuses or reduced salaries.

The Shareholder

In another plausible scenario, those at the very top of the ladder could also lose out. To create room for the additional wage costs, company profits may take a direct hit if businesses chose to try and avoid reducing salaries elsewhere, or hiking up prices.



delivering all salary and employee shift data, eliminating more admin time. To save further, payroll can be outsourced to software providers like Selima, to further reduce and streamline a costly process. Get efficient with employee self-service. As another forward-thinking measure, great HR software will also have a self-service function. This has a couple of benefits. Rotas, payslips and communications are some of the things that can be accessed online, on a smartphone or computer, saving on printing costs, and making the information readily available for employees. It's also paperless, and kinder to the environment.

The Consumer

The simplest solution for some businesses will be to put up their prices. That way, they avoid affecting their employees and the shareholders, but as paying customers we'll be forced to spend more for the same goods or services.

The Business

As we know, the initial feedback from early adopters of the National Living Wage is that staff are more motivated. In this circumstance, it may be that both customer and shareholder are safe and employee salaries are protected, but staff are simply working harder and increasing output.

The Taxpayer

Finally, as many workers on the minimum wage are government employees or part of the government contractor workforce, introducing the new National Living Wage will be expected. This may have a direct impact to the cost of public services to the taxpayer.

Admittedly, this paints a rather bleak outlook. We now have a good sense of the potential impacts the new National Living Wage may have. The burning question in light of these findings is what businesses can actively do to lessen the impact.

How to Lessen the Impact

Businesses are already looking into the benefits of efficient wage management. Now more than ever, having a firm handle on salary costs could make all the difference. Through effective staff management and with the right HR tools, companies can assess salaries and forecast the impact of wage changes.

So, how can scheduling software create a tangible difference? Cloud-based HR platforms like Selima's can tackle a number of areas simultaneously to manage staff, reduce waste and contribute to a healthy bottom line. Although the technology is smart, the theory behind its functionality is grounded on good common sense and business management.

Work intuitively

In-built features allow managers to streamline staff rotas, ensuring that only the right amount of people are covering the essential areas. Utilising the skills of each employee and reducing wastage. This links neatly into staff budgets. Once created, the cost of each rota can be compared to the budget and tweaks can be made before confirming.

Act on insightful real-time data

Clever real-time data on daily takings is another key tool to boost business effectiveness. Modern software links to EPOS data, providing up-to-the minute snapshots of revenue versus budgets and forecasts, smoothly delivering key information at a click. Impacts of seasonal activity, events and the weather can also be factored into reporting. So managers can always rota the right amount of staff at key periods, like Christmas for example, to cover off busy weeks and proactively save wage costs in quieter times.

Automate staff admin

Many of these functions are performed automatically once the right information is entered into the system, reducing admin hours. It connects intuitively with payroll,

Speaking of clever technological advancements, another final nifty thing to highlight is the clocking-in process. Traditional clocking-in machines are said to cost companies £2.52bn a year through employee manipulation. By providing iPads with a pin-activated clocking-in feature directly linked to employee rotas, this can be neatly sidestepped, creating an effective solution that adds real value to the bottom line.

In Conclusion

The impacts of the new wage legislation are set to influence businesses across the UK. The most effective way to combat this is to gain a clear view of what these changes mean to your business, now. By building a picture of the realities of the National Living Wage, effective strategies can be put into place to safeguard against devastating consequences for both businesses and their staff.

Ultimately, escaping these effects completely isn't a possibility, but with the right support, outlook and ways of working, easily implemented changes can make big savings and contribute to a healthy, happy workplace.



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Source: "The Living Wage: an economic impact assessment", KPMG, <https://www.kpmg.com/uk/en/issuesand-insights/articlespublications/pages/the-living-wage-an-economic-impact-assessment.aspx>



Casual dining gets best of June sales growth

The growing popularity of branded restaurants was a big factor in boosting eating-out sales in June, latest data from the Coffer Peach Business Tracker show. Managed pub and restaurant groups collectively saw like-for-likes sales grow 1.7% against June last year – with restaurant chains' like-for-likes up more than twice that at 3.6%.

"We expected pubs to do relatively less well, and restaurants better, this month because of the boost that drink-led pubs in particular received this time last year from the football World Cup. But the truth is that restaurant chains have been outperforming the pub sector for some time now," said Peter Martin, vice president of CGA Peach, the business insight consultancy that produces the Tracker, in partnership with Coffer Group, Baker Tilly and UBS.

"The World Cup, and especially the weeks that England were still in it, helped both pub and drink sales grow last June - in what was otherwise a flat market for branded restaurants and the market as a whole. So last month's trading is more than just a bounce back, as even pub sales were up slightly," he added.

Martin said that while casual dining brands were generally trading ahead of the market, it was their performance away from London that was particularly impressive, "Collectively restaurant chains saw same-store sales grow 5% outside of the M25 compared with June 2014 – and that is also where those groups are concentrating their brand roll-outs," he said.

"Total sales for branded restaurants outside of London, which reflect the impact of those new openings, were ahead 12.8% compared to last June. That compares with a 5.8% total sales uplift for the sector as a whole," Martin added.

Managed pub groups, including the major pub restaurant operators, saw like-for-like sales up 0.8% for the month against last June, with food sales making up for a poorer drink performance, even in drink-led sites. Pub food sales grew 3%, while drink was down 0.5%, the Tracker showed.

"The strong showing of restaurants in June also meant that overall London trading was less good than the rest of the country – at least among established players. Even with the

distortion of the World Cup, the underlying market is showing steady progress," added Martin.

Paul Newman, head of leisure and hospitality at Baker Tilly, said: "The eating and drinking out market continues to demonstrate rates of growth significantly ahead of the wider economy. Despite an unremarkable June in terms of the weather and sporting events, the industry's sustained feel-good factor amongst consumers is unrelenting. Households have led the charge in the recovery since the recession. The key question for us is whether that spending growth will continue to sustain the significant new site rollout plans of so many well-funded branded operators."

Mark Sheehan, managing director of Coffer Corporate Leisure, added: "Yet again we are seeing pub and restaurant like-for-like growth outperforming inflation. This growth is no longer dominated by London and we are seeing the rest of the UK continuing to power forward. The sustained growth of restaurant chains in the provinces will be hurting independent operators and we expect to see an increased number of casualties in the future."

Jarrold Castle, leisure analyst at UBS Investment Research, observed: "June's like-for-like growth of 1.7% follows May's 2.1%, April's 1.2%, and March's decline of -0.3%. This leaves the 12-month moving average growth rate at 1.7%. However, while there was no real difference in LFL growth between London and the regions last month, the 12-month moving average inside the M25 is now 2.4% while outside it is still lower at 1.4%."

The Coffer Peach Tracker industry sales monitor for the UK pub and restaurant sector collects and analyses monthly performance data from 30 operating groups, and is recognised as the established industry benchmark.



Hotel security is a safari: the predator verses prey principle

The predator verses prey principle that plays out in nature applies in the human world as criminals verses victims. In nature, if the prey was aware of what the predator was up to, the prey would actually have a chance of survival. The prey always has a chance to survive when it learns from the past and starts to develop new behavioural patterns that are less predictable. Of course, it can't learn anything when it is already eaten, but it can learn if it constantly observes its environment where it sees others get eaten and changes its behaviour in order to outsmart the predator.

Hotel security is a safari

In the national park Maasai Mara in Kenya you can watch the drama unfold as a predator stalks its prey. For instance, a leopard lies low in tall grass watching its prey – a herd of zebra drinking at a waterhole. One zebra becomes aware of the danger and suddenly makes a distinctive sound to warn the herd and/or suddenly bolts away at full speed. The herd instinctively reacts to the signal(s) of the spotter and also dashes off to make their escape. Sometimes the Zebra 'on lookout duty' might not see the predator directly, but it has a gut feeling or senses danger lurking close in the tall grass.

Zebra herdIn our human world we define this instinctive reaction as teamwork. When everyone works together and understands the signals from 'the spotter', the group can avoid falling victim to criminal activities.

The prey can react quickly to the danger and outsmart predators when it keeps its eyes and ears open. When something does not feel right, then it needs to report to the group (= the herd). This is what we understand as the SEE, HEAR, FEEL and TELL approach in hotel security. It is broader, more encompassing than "See Something, Say Something".

SEE, HEAR, FEEL and TELL teaches:

1. How to pick up more on suspicious activity
2. How to be more trusting of your own instincts
3. The importance to report suspicious activity to the management without delay
4. Teamwork
5. What to avoid
6. How to protect yourself.

When you simply teach or rely on, "See Something, Say Something", how to protect yourself from ending up a victim is not clearly addressed.

What can we learn from nature?

The best method to prevent loss is to react when predators are spotted early and before they actually do damage to anything or anyone, just as we saw in the example of the zebra and the leopard. I am sure you would agree.

Some hotels already use effective methods to blow a criminal's cover. Cyber criminals, lone wolves and the traditional street criminals for example are starting to realise they can't remain undetected for very long in a security-aware hotel, and so they move on to easier pickings.

It is predictable that criminals will move on to an easier target when they realise they are under surveillance. That's the way of nature too. When the leopard is not super hungry or desperate, it will do exactly the same. Criminals will move to another target

where staff is less security aware.

The hotels that are less security conscious will be more at risk in the future and will experience more damage than those who are up to speed with security training for their staff. My concern that I share with other security experts is that the risk will shift to boutique hotels and smaller hotel brands no matter where in the world they are. Even though they are now less attractive targets than the big players in the market, they represent the frail or lone animal on the outer that predators will cull from the herd and then attack.

The logical solution is to get all staff trained in security awareness. When I am talking about "all" staff being trained, I literally mean everyone. Of course this will involve developing qualified trainers, and there will be a cost. But what cost not to prepare? The cost could be much greater even if you fall victim to only one crime.

Think about the predator vs. prey principle again. Hoteliers have a duty of care for staff, but also for ethical reasons, everyone needs to receive training because no one should be left behind and not know what to do in a security incident. As I have indicated, criminals can be highly intelligent and they figure out up front who is the weakest one in the system and who is not trained.

Safari means 'a journey' in Swahili. The hotel industry is on safari – on a security journey that requires constant innovation and the enduring will to protect itself as criminals become more sophisticated and safety risks increase worldwide.

Editor's Note: Nowadays, Security Awareness training is not expensive or hard to organise. Online Hotel Security Awareness Courses are the future trend because they are affordable and can be easily implemented anywhere in the world. By enrolling in the Online Hotel Security Awareness Course from eHotelier Academy your staff will learn how to be a smart prey that escapes today's criminal predators.

About the author

Stefan Vito Hiller is the Founder & Managing Director of Sky Touch – Global Hotel Security Consulting. He has over 20 years international experience in the hotel industry, including five years specifically in security.

His hotel experience includes rooms division management, pre-opening, fire, health & safety, risk management & cost control. He has worked for leading hotel brands in Munich, Frankfurt, Bremen, Berlin, Cork, Edinburgh and Doha in the Middle East.

He graduated in 2002 as a Hotel Management Consultant at the Steigenberger Hotel Management School. He gained valuable experience as a Cost Controller at the Sheraton Hotel & Towers at Frankfurt Airport. He worked three years in Ireland where he built on his experience as a former volunteer fire officer and became a qualified IOSH Health & Safety Officer. He effectively combined the field of Health & Safety with his Assistant Manager positions.

Stefan now consults to hotels to implement innovative and affordable strategies to raise their level of security to meet growing global demands.



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Breaching the walls

Hotel companies are learning to be nimble in the face of security breaches

Mandarin Oriental has reassured customers that, despite a hacker using malware to obtain access to certain credit card systems in a number of its hotels earlier this year, it found no evidence of misuse of credit card PINs or security codes, or any other personal guest data.

In the case of the original attack, the company was quick to respond, issuing a public statement on its website to alert guests to the attack so they could take proactive measures to monitor their credit card activity.

It also immediately engaged law enforcement, cyber-forensic specialists, and appropriate credit card companies to coordinate investigation efforts and to take further steps to assist guests.

The group commented: “After a thorough investigation, we now know more about the incident and are notifying affected guests. We have established a call centre that is prepared to address any questions our guests may have about the breach. We regret that this incident occurred and are sorry for any inconvenience it may cause. We take the safety and security of our guests and their personal information very seriously, and the trust our guests place in us remains an absolute priority.”

At the time of the attack the company said that it had been the victim of “an unauthorised cyber-attack” and commented “unfortunately incidents of this nature are increasingly becoming an industry-wide concern and therefore we have also alerted our technology peers in the hospitality industry”.

Unfortunately for guests, Mandarin Oriental is indeed far from alone. The news of the attack came weeks after rumours of a second attack on White Lodging, a franchise management company with hotels across a number of brands, including Marriott International and Hilton Worldwide.

The sites thought to have been affected were the same as those hit by a similar breach in 2013, which centred around compromised point of sales systems, although not all were affected and there were a number of new sites.

Security blogger Brian Krebs reported that multiple financial institutions were complaining of fraud on customer credit and debit cards that were all recently used at a number of properties run by White Lodging.

White Lodging said that since the last event, had adopted a number of new security measures, including the installation of a third-party managed firewall system.

Dave Sibley, White Lodging president and CEO, Hospitality Management: “After suffering a malware incident in 2014, we took various actions to prevent a recurrence, including engaging a third party security firm to provide security technology and managed services.

“These security measures were unable to stop the current malware occurrence on point of sale systems at food and beverage outlets in 10 hotels that we manage. We continue to remain committed to investing in the measures necessary to protect the personal information entrusted to us by our valuable guests.”

Marriott International spokesman Jeff Flaherty told Krebs: “We were made aware of the possibility of unusual credit card transactions at a number of hotels operated by one of our franchise management companies. We understand the franchise company is looking into the matter. Because the suspected issue is related to systems that Marriott does not own or control, we do not have additional information to provide.”

In addition, Marriott International said that it was coming to the end of a project to retrofit cash registers with tokenisation technology, which substitutes card data with placeholder information that has no intrinsic or exploitable value for attackers.

“As this matter involves Marriott hotel brands, we want to provide assurance that Marriott has a long-standing commitment to protect the privacy of the personal information that our guests



entrust to us and we will continue to monitor the situation closely,” he said.

“Marriott is currently on track to have all our US managed systems fully tokenised within the month or so.”

One of the key issues around the 2013 breach was one of timing – the matter did not come to light until January 2014, plenty of time for any stolen details to have been used. In this case both Marriott International and White Lodging appear to be on top of the matter and, critically in a sector not known for its security, were already enacting strong security protocols.

As Mandarin Oriental has shown, the sector has learned to respond quickly to the threat. Unfortunately, it seems likely to become an increasingly familiar one.



Clouds over London

London hotels reported a decrease in gross operating profit per available room (GOPPAR) in the month of June, but the UK provinces continued to show much more positive year-on-year movements with South West hoteliers recording a 12.6% surge in GOPPAR, according to the latest data from HotStats.

Hotels in the South West of the country achieved a combined rise in occupancy of 1.7 percentage points to 83.10 and in average room rate (ARR) of 7.7% to £78.14 resulting in a noteworthy increase of 10.0% in revenue per available room (RevPAR) to £64.97. But mixed performances were recorded in non-rooms revenues, which softened total revenue per available room (TRevPAR) levels to a growth of 6.9% to £106.39.

Payroll and operating cost control helped to enhance departmental operating profit per available room (DOPPAR) by 8.8% to £60.07 and, although overheads per available room jumped by 3.9%, GOPPAR went up by 12.6% to £35.32.

Aberdeen aches...

During the month of June hotels in the oil capital of Europe posted negative year-on-year comparisons across all key performance indicators. Occupancy levels decreased by 9.2 percentage points and ARR by 18.5%, leading to a significant RevPAR drop of 28.2% to £62.33.

Moreover, an overall contraction in non-rooms revenue per available room from meeting room hire (-50.3%), food (-21.8%) and beverage (-18.9%) led TRevPAR levels to plunge to £90.74 (-27.2%). Hoteliers' payroll costs increased by 5.4 percentage points to 27.6% which further impacted the GOPPAR decline of 42.4% to £34.90, representing a gross operating profit conversion of 38.5% for the month.

...Whereas Glasgow grins during the month of June

Glasgow hotels experienced a positive month of June with increases across the board. There was a TRevPAR uplift of 13.2% to £121.10 alongside a GOPPAR increase of 28.3% to £49.42. The RevPAR increase of 23.8% was driven by combined surges in occupancy of 5.2 percentage points to 91.9% and ARR by 16.7% to £85.99.

The two highest rate increases were attributed to the residential conference (+22.1% to £99.92) and tours/groups (+20.7% to £63.08) segments. Revenue per available room derived from beverage and food declined, but leisure and meeting room hire revenues rose with both fuelling to the TRevPAR growth of 13.2%. Lastly, efficient cost control and a decrease in payroll (3.7 percentage points) led to a 19.2% DOPPAR increase all helping to deliver a GOPPAR hike of 28.3%.

The month of June 2015

| | Jun'15 | Jun'14 | Var b/w | |
|------------|-----------|--------|---------|--------|
| SOUTH WEST | Occ % | 83.1 | 81.4 | 1.7 |
| | ARR | 78.14 | 72.54 | 7.7% |
| | RevPAR | 64.97 | 59.07 | 10.0% |
| | TRevPAR | 106.39 | 99.54 | 6.9% |
| | Payroll % | 29.8 | 31.0 | 1.1 |
| | GOP PAR | 35.32 | 31.38 | 12.6% |
| ABERDEEN | Occ % | 68.2 | 77.4 | -9.2 |
| | ARR | 91.34 | 112.15 | -18.5% |
| | RevPAR | 62.33 | 86.82 | -28.2% |
| | TRevPAR | 90.74 | 124.67 | -27.2% |
| | Payroll % | 27.6 | 22.2 | -5.4 |
| | GOP PAR | 34.90 | 60.38 | -42.2% |
| GLASGOW | Occ % | 91.9 | 86.7 | 5.2 |
| | ARR | 85.99 | 73.69 | 16.7% |
| | RevPAR | 79.06 | 63.89 | 23.8% |
| | TRevPAR | 121.10 | 106.99 | 13.2% |
| | Payroll % | 25.0 | 28.8 | 3.7 |
| | GOP PAR | 49.42 | 38.51 | 28.3% |

The Calendar year to June 2015

| | YTD'15 | YTD'14 | Var b/w | |
|------------|-----------|--------|---------|--------|
| SOUTH WEST | Occ % | 73.4 | 71.1 | 2.2 |
| | ARR | 75.87 | 71.56 | 6.0% |
| | RevPAR | 55.67 | 50.90 | 9.4% |
| | TRevPAR | 92.98 | 86.86 | 7.0% |
| | Payroll % | 32.8 | 33.8 | 1.0 |
| | GOP PAR | 25.48 | 22.24 | 14.6% |
| ABERDEEN | Occ % | 65.8 | 73.2 | -7.3 |
| | ARR | 99.08 | 110.01 | -9.9% |
| | RevPAR | 65.24 | 80.52 | -19.0% |
| | TRevPAR | 93.11 | 113.58 | -18.0% |
| | Payroll % | 27.9 | 23.5 | -4.4 |
| | GOP PAR | 34.82 | 50.61 | -31.2% |
| GLASGOW | Occ % | 80.8 | 78.7 | 2.1 |
| | ARR | 75.96 | 70.25 | 8.1% |
| | RevPAR | 61.35 | 55.28 | 11.0% |
| | TRevPAR | 100.18 | 94.20 | 6.3% |
| | Payroll % | 29.6 | 31.0 | 1.5 |
| | GOP PAR | 32.74 | 28.73 | 13.9% |

The twelve months to June 2015

| | Rolling'15 | Rolling'14 | Var b/w | |
|------------|------------|------------|---------|--------|
| SOUTH WEST | Occ % | 75.9 | 73.4 | 2.5 |
| | ARR | 75.86 | 70.60 | 7.5% |
| | RevPAR | 57.60 | 51.85 | 11.1% |
| | TRevPAR | 96.89 | 89.68 | 8.0% |
| | Payroll % | 31.9 | 33.0 | 1.1 |
| | GOP PAR | 28.10 | 24.39 | 15.2% |
| ABERDEEN | Occ % | 71.1 | 74.9 | -3.9 |
| | ARR | 104.03 | 105.32 | -1.2% |
| | RevPAR | 73.94 | 78.92 | -6.3% |
| | TRevPAR | 106.34 | 113.30 | -6.1% |
| | Payroll % | 25.5 | 23.9 | -1.6 |
| | GOP PAR | 44.45 | 49.86 | -10.8% |
| GLASGOW | Occ % | 82.9 | 80.6 | 2.3 |
| | ARR | 81.85 | 69.29 | 18.1% |
| | RevPAR | 67.87 | 55.88 | 21.5% |
| | TRevPAR | 109.74 | 96.83 | 13.3% |
| | Payroll % | 27.6 | 30.4 | 2.8 |
| | GOP PAR | 40.35 | 30.65 | 31.7% |

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
visit 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 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 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 HOSPSPACE's popular highly topical programme of hospitality industry specific education workshops - all led by top specialists in their subjects.

As in past years, HOSPSPACE 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.hospaspace.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 - HOSPSPACE

17th Dec - Annual Awards Lunch - London

To book please contact 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

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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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.

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