

THE OVERVIEW

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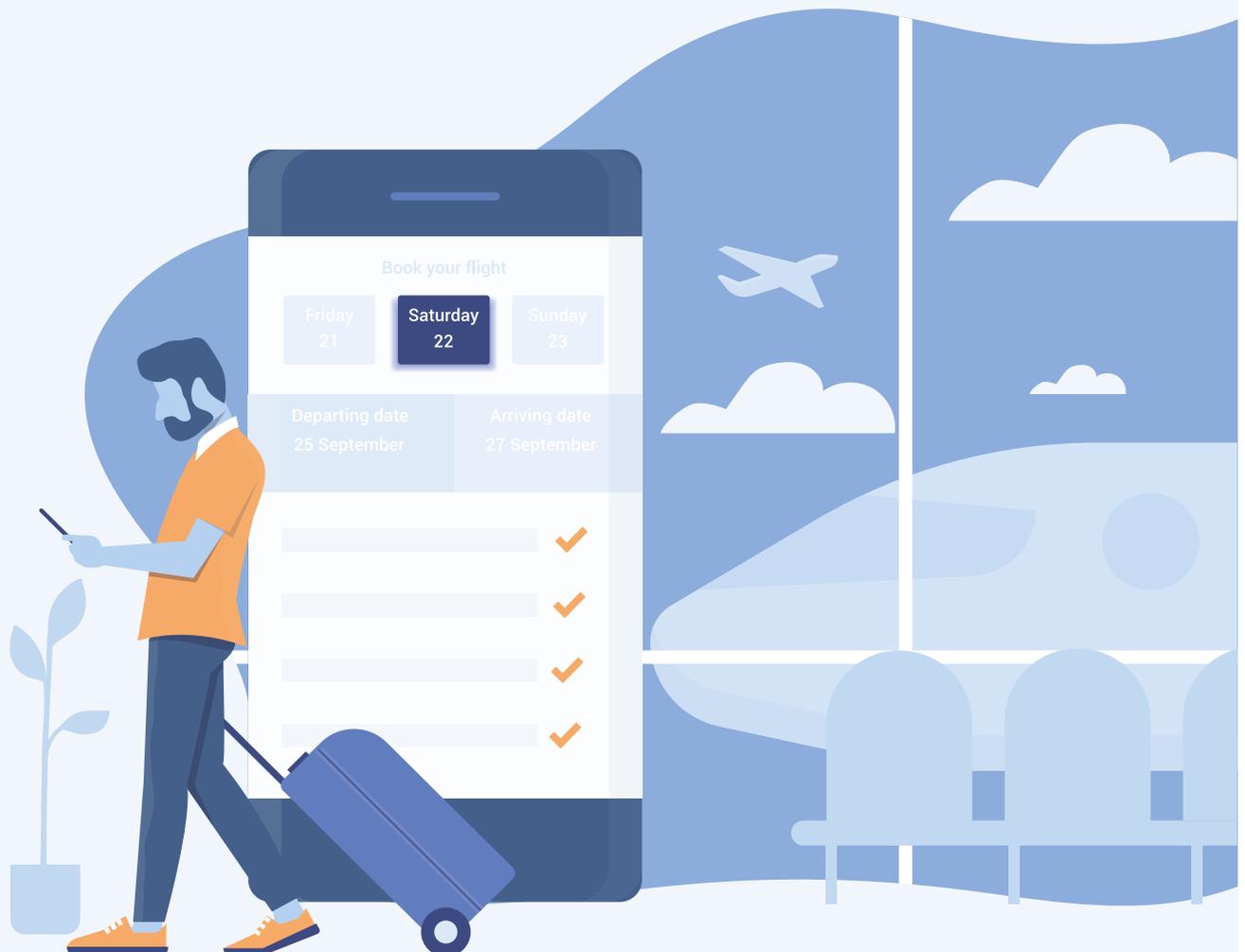
Is it over for the OTAs?

Finding meaning in the
recent stock crash **P7**

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Winners, profiled. This
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Award winner **P4**

Migration strategy
attacked. Industry
concern over the
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Welcome to THE OVERVIEW

By the time you read this, it is hoped that the Coronavirus will have peaked and the loss of life will be limited. But, without wishing to sound too much like a disaster movie, the medical professions believe that we will see these events pop up more and more. As such we must prepare not only our medical response, but our tourism one.

That's not to be callous, you understand, but Oxford Economics is now forecasting that the US will experience a loss of 1.6 million visitors from mainland China this year, with an expected loss of 4 million hotel room nights.

Europe was also expected to suffer, with Chinese travellers making 3 million visits to European countries, up 7.4% versus the same period a year ago in the first half of last year. "Assuming that there would be a sharp drop in Chinese tourism throughout the entire year, many European economies would see consumption weaken," said Carsten Brzeski, chief economist at ING.

A lack of knowledge goes a long way with the impact of the virus and some

have been accused of using it to political ends. President Donald Trump signed an order for the US to deny entry to foreign nationals who have travelled to China and was accused of using it as a stick in trade negotiations, which had also served to limit Chinese travel to the country.

The response has been piecemeal. Pity the poor people stuck on cruise ships (we can expect to see any number of horror movies inspired by these events at sea in next year's summer blockbusters) and pity those making border decisions without a shared plan - Europe debated long after the virus became apparent about what to do with the Schengen zone.

In the UK, a lack of knowledge meant that Chinese restaurants reported a plunge in bookings and loss of earnings, despite there being no evidence to suggest that the virus was transferred by food which traditionally hailed from certain lands.

The response has been vastly varied and not always deep on fact. With global travel on the rise - and this sector relying on it - there must be a concerted effort to work on a shared response, to protect us and our livelihoods.

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



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Migration squeeze pressures sector

HOSPA CEO Jane Pendlebury responds to the government's latest immigration plans.

It was with a groan that I read the official Government announcement about the plans for a new points-based immigration system.

As the Chief Executive of HOSPA, I'm well aware of the potential impact this is set to have on our members.

The hospitality industry is the third largest employer in the UK, but many of the jobs within it aren't deemed 'skilled' – they mainly require hard work, determination and a willingness to go above and beyond. And always with a smile, of course!

Sadly, a career in hospitality in the UK is often regarded merely as a stepping stone – particularly for university students looking for part time or seasonal work. By contrast, attitudes on continental Europe are very different, with hospitality seen as a well-respected career path thanks to its wealth of opportunity.

Post-Brexit, HOSPA and other industry organisations need to work hard to try and change perceptions of our sector. It's a career where you can start at the very bottom rung of the ladder and progress to the very top. This isn't hyperbole either. There are countless examples throughout the industry, where pot washers or part time waiting staff have gone on to become General Managers or to head up leading hotel groups. There's no ceiling to success.

The hospitality industry has already been heavily affected by the initial Brexit vote, with many EU workers feeling alienated and unwelcome. This latest move now goes beyond that. A vast pool of willing talent is set to be cut off from an industry already struggling with staffing. Consequently, the long-term implications on what should be a thriving trade are extremely concerning.

Brexit and immigration policies aren't



the only head winds buffeting the industry at the moment either. Coronavirus is a cause for concern for many of us. Not just the obvious threat to health that it holds for wider society, which is of course in itself a worry, but the knock-on effect on hospitality. Global conferences are being cancelled, although I believe ITB is still planning to go ahead as planned.

Chinese tourism is growing exponentially. Statistics in The Telegraph earlier this month suggest that between 2010 and 2018, Chinese overseas trips rose by 1,326% to 149.7million. By 2030 they're projected to rise to 400million – an astonishing statistic.

UK hospitality businesses are already embracing this trend, with more and more set to do so as this welcome boost to trade continues. However, what is the impact of a prolonged outbreak of the virus likely to be? With new developments around Coronavirus happening on a daily basis, no

one can really say – which makes planning for the future all the more difficult.

It might seem like an odd contrast; lamenting staff shortages on the one hand, while decrying a potential drop in trade on the other – as surely the second solves the former? However, of course, the complexities are far more nuanced than that. We welcome and want a thriving, busy industry. We want to be embracing new markets, while employing a diverse and enthusiastic workforce. I remain unflinchingly optimistic about our industry, but its waters are difficult to navigate from time to time – and recent news is sure to cause some choppy waters. We just need to ensure we pull together to weather it.

Jane Pendlebury

HOSPA CEO
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Celebrating with our top learners!

This month we feature the winner of the HOSPA 2019 'Learner of the Year in Revenue Management' - Leanda Laughey. Leanda has been studying on our courses in Revenue Management and in 2019 she achieved the highest set of results for the year based on her studies for Level 1 and Level 2.

Leanda was presented with her Award by HOSPA President, Harry Murray MBE, at the HOSPA Annual Awards Ceremony held in January in the Screening Rooms at the Soho Hotel. The Award was kindly sponsored by RM Recruitment Specialists, Edwards & Finn.

Leanda is Revenue Manager at the Coombe Abbey Hotel near Coventry. Founded in 1150 AD as the Abbey of Cumbe, Coombe Abbey Hotel, settled in amongst acres of parkland in Warwickshire, enjoys a rich and fascinating history, with ties to royalty and the Gunpowder Plot. With 121 rooms and wedding, conference and banqueting facilities, the hotel provides an excellent location for relaxing weekend away or venue to celebrate the most special of occasions.

Leanda began her professional life in 2007 with a BA (Hons) Event Management from the University Institute of Wales, Cardiff. Her first role was as Conference & Events Sales Executive at the Hilton Cardiff. Leanda explains,

"I was Conference Manager at Coombe Abbey and then went on maternity leave, I was about to return when the position of Revenue Manager became available and I was asked if I would consider it. I had been interested in the revenue career path so the timing was perfect. I suggested that I do the HOSPA Revenue Management course so that I could learn the theory alongside doing the role. Whilst I had gained some understanding of the concepts throughout my career, it's been hugely beneficial to learn the theory and really develop my skills. It's given me the confidence to challenge existing processes and develop my own, leading



my hotel to become much more Total Revenue focussed. I want to continue building my knowledge and experience in Revenue and use that to further develop my career in hotels."

Leanda has recently completed Level 3 of the HOSPA course and received her results at the end of February. She can now use the letters AHOSPA (Cert RM) in her correspondence and we are very

proud of her achievements!

We are now enrolling for the next intake to our RM programmes with the courses starting on the 9th March. For more information on how to enrol email education@hospa.org or visit <https://www.hospa.org/finance-revenue-programmes>

Next month we will be featuring the winner of the HOSPA Learner of the Year in Financial Management.

Come study Revenue Management with HOSPA

We are justifiably proud of our programme of courses in Revenue Management which have received numerous accolades from learners and their companies alike.

The set of three HOSPA Revenue Management courses provide the opportunity to take a deep dive into the different aspects of hospitality revenue management. Whether you start with the Introductory Level or join us at a higher Level:

- All the course materials are available online, hosted on our very own bespoke virtual classroom (www.hospalearning.org)
- The theory and examples have been written specifically to match the needs of revenue management professionals in the hospitality industry
- Your learning will be based on best practice with course materials written by industry practitioners and leading authors in the field
- All learners are supported by an experienced tutor who will be available online 5 days per week to answer questions and guide your learning
- As well as the course materials, learners have access to members benefits including a database of online business journals from a range of excellent sources including a subscription to current and past copies of the Journal of Revenue and Pricing Management worth over £200 per annum.

What is available?

The Programme is available at three Levels, each taking five months to complete, and has been designed to enable learners to undertake work-based activities as a part of their assessed coursework.

The three Levels available are:

Level 1: Introductory Revenue Management

The Introductory modules at this level are designed to provide Revenue Managers of the future with the knowledge required to work in a Revenue Manager role and will also provide operational managers with some knowledge of the function within a hospitality property.

Level 2: Operational Revenue Management

These modules deliver a more detailed insight into the Revenue Management discipline providing learners with the theory to support a range of practical activities.

Level 3: Strategic Revenue Management

Level Three modules provide the opportunity to study the strategic role of revenue management in the wider business context as well as considering more detailed approaches to Revenue Management.

A certificate of achievement is issued on successful completion of each level of study.

How does it work?

Learners are provided with a study pack, three textbooks and additional e-chapters to work through and are required to complete some assessed assignments, submitting them according to a timetable at approximate five-week intervals, and then pass a 2 hour examination for Level 1 and 2. Examinations are held in January and July each year at our exam centres in London, Birmingham, Manchester, Scotland and Dubai. Overseas examinations can be arranged at the

“Whilst I had gained some understanding of the concepts throughout my career, it’s been hugely beneficial to learn the theory and really develop my skills. It’s given me the confidence to challenge existing processes and develop my own, leading my hotel to become much more Total Revenue focussed. I want to continue building my knowledge and experience in Revenue and use that to further develop my career in hotels.”

learner’s cost through the British Council or local education institution. Level 3 is assessed via a work-based project.

What do I get?

Completion of the full programme of courses, through study or exemption, leads to Certified Associate membership of HOSPA enabling you to use the letters AHOSPA (Cert RM) in your business correspondence and demonstrates that you have the competence to manage the hospitality revenue management function at Unit level.

Does industry recognise the courses?

The programme is endorsed by the Institute of Hospitality, demonstrating that it adheres to good practice standards in training and training delivery, is relevant to the needs of the industry and meets a wide range of essential criteria relating to quality standards and quality learning outcomes. The IoH particularly commended:

- The quality of materials and access to e-libraries and databases
- The work-based nature of the assessments
- The explicit timetable of events for each Level of the programmes
- The support mechanisms available to learners at Level and in particular, the Tutors
- The expertise of the staff involved in the running and support of the programmes, and the advisory committees

To read the comments from our learners and industry supporters visit www.hospalearning.org

What does the course cost?

The cost for each Level of the course is £820.00 plus postage of the study pack* and VAT. As a student member of HOSPA, learners receive a range of additional benefits including copies of the monthly online magazine “The Overview” together with discounted rates to HOSPA events including the annual conference. (www.HOSPACE.net)

What next?

We are now accepting applications for the March 2020 intake. To apply, visit www.hospa.org/revenue-management-programmes

The next level: exciting times

Percipient's managing director, Chris Stock, looks at why good service alone is no longer enough for hotels to build market share in 2020.

With revenues of \$570.18 billion in 2017, the global hotel industry is a force to be reckoned with. But, faced with more competition than ever before, hotels and hospitality businesses are having to strive harder to secure that all-important competitive advantage, finding new and innovative ways to stand out in an increasingly competitive marketplace. In recent years, it's been a case of go big or go niche. Large chains grow ever larger. And boutique entities are coming up with ever-more unusual experiences and concepts to attract new customers, from truffle hunting to lobster fishing.

With customers all expecting more personalised, exciting, tailor-made experiences as standard, the rush to provide such offerings can sometimes be detrimental. Often, not enough thought is given to what back office support is needed to not only ascertain which services customers want and will pay for, but to underpin the successful delivery of these services. In short, robust back office systems are key to innovating at the customer-facing level, with even the slightest flaw in the back office function causing the overall proposition to fall apart.

In light of this, more and more hotel and hospitality businesses are reviewing their back office processes in an effort to lay the solid foundations on which to build exciting new services and experiences that are delivered consistently well.

System disconnect

It's not uncommon to find a network of outdated, legacy systems in place, solutions that have been bolted together in an attempt to unite all areas of the businesses. These workarounds simply aren't efficient enough to keep pace with

the hotel and hospitality industry of today. The time and effort it takes to amalgamate information from different departments and systems result in outdated, inaccurate information being used to inform important strategic decisions. It's impossible to achieve a comprehensive, up-to-date view of not only the business, but customers as well, leading to ineffective, delayed decision-making. Inevitably this lack of insight impedes hotels' ability to provide the innovative experiences and the quality of customer service that are needed to differentiate themselves.

To rectify this back office disconnect, more hotels and hospitality businesses are choosing to unite their back office functions with a single, centralised, often cloud-based solution, that automatically pulls information together from right across the business. This not only streamlines multiple, diverse back office processes, freeing-up valuable time to concentrate on more strategic, value-add activities, but it breaks down long-held silos of information, furnishing the right people with the right data at the right time, data that is accurate, consistent and just what's needed to underpin a slick, customer-facing operation.

Targeted services

Additionally, access to an accurate, comprehensive picture of your customers, that only a joined-up system can provide,

ensures the services you're offering are targeted to meet their specific needs. And, by pulling together information from different areas of the business, the right systems can analyse customer behaviours, preferences, spending patterns, to name but three, helping to better anticipate demand, improving your forecasting and shaping the ideas that will appeal to your target market, all while optimising promotional and pricing strategies in line with the in-depth business intelligence that's now available at the click of a mouse.

Where older, disjointed systems have previously held back expansion and growth plans, the right centralised system will scale-up as the business grows, growing alongside the business as well as providing the flexibility and agility to deal comfortably with any seasonal peaks in demand and service levels. Performance management is greatly enhanced too, with a standardised solution making it much easier to compare like-for-like, be it across departments or different business sites, providing the right information to inform operational and strategic change wherever needed to boost performance.

It's simply not enough to deliver unique and unusual services and experiences for customers. To ensure your hotel or hospitality businesses stands head and shoulders above the rest, services have to be delivered well, every time. To give your business the ability to deliver the right services, at the right margins, to the right people, with customer service excellence at the very heart, your back office processes need to be in tip-top condition. With a centralised, agile back-office solution in place, what results is a seamless back-office function, underpinning a polished, responsive customer-facing operation for increased market-share and that all-important boost to profitability.

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Finding meaning in OTAs' recent stock crash

For most online booking platforms, the end of 2019 was, to put it mildly, quite rocky. Indeed, as the decade came to a close, we saw a significant stock decrease for many huge players in the digital travel sector.

Take for instance Expedia, which saw a massive 27% drop in early November, or TripAdvisor whose stock lost more than 30% in the same month. And while other actors like Booking.com seems to be holding on for now, this conjoint plunge deserves further investigation.

Who fears the Google?

For quite some time now, travel specialists have speculated that Google will, at some point, become an OTA and compete with the likes of Booking.com and Expedia. And even though this menace has been looming on the market since the early 2010s, the turning point seems to be closer than ever before. Knowing the handhold of the Californian giant on the Search Engine market, Google's OTA seems to be hanging like a sword of Damocles over the major players in the digital travel industry.

Moreover, executives at Expedia also stated that, recently, Google search engine had not been very kind to them in terms of referencing. As Google seems to be leaning towards pushing other means of booking hotels (such as Google Hotel Finder of Gmaps), it has become harder and more expensive for OTAs to outrank the online competition.

In short, it's a hard sell that the current OTAs have what it takes in terms of differentiation to outshine Google future booking platform if it ever comes to that. This fact combined with the continued and necessary reliance on Google search

engine makes for an explosive mix according to financial analysts.

Results vs expectations

Maybe in part as an aftermath of the change in SEO stated earlier, Expedia, TripAdvisor, Trivago and others had very disappointing results compared to expectations. These announcements immediately triggered the conjoint travel stock drop along with other consequences. For instance, Expedia let go of both its CEO and its CFO following the crash, meanwhile Trivago surprised everyone by also naming a new CEO in place of its co-founder Rolf Schrömgens.

These major changes in management structures are far from innocuous. In fact, it can be interpreted as the companies understanding the need for a new strategical approach as well as new captains ahead of a sea full of threats and challenges. How those leaders will adapt (or not) their business model to address said problems will likely be determined in the near future.

Who doesn't like change?

If we take a step back and think about the question on a more strategic and global level, we can find yet another explanation. In the hospitality industry, travel habits are in constant evolution. This phenomenon is emphasised since the digital revolution, as technology can throw our lifestyle upside down almost overnight.

In this context, it can be hard for travel companies to keep up with this state of constant transformation. As we work with

hoteliers on a daily basis, we started to feel such a shift happening in the industry since around 2015. This can only be described as a deep change in paradigm which is on its way to shake the online travel market.

During the last 10 years or so, travellers got used to booking their hotel stay online, mainly through OTAs. But as time went by and OTAs model stagnated, travellers and hoteliers expectations have started to shift. On the hotels' side, GMs are getting tired of the more than strict conditions imposed on them by OTAs (mainly the rate parity, the high commissions and data ownership). This triggered a trend called "return to direct" which urges hoteliers to develop a direct booking strategy instead of solely relying on OTAs. On the travellers' side, the key words are personalisation and closeness. Indeed, the latest generations of travellers (i.e. Millennials and Gen Z) hate to be treated as just one pawn on the chessboard. They are looking for real human interaction over mindless computing/OTA standardised offerings and are judging which hotels would be the best fit for them.

The point is that all these trends are

In short, it's a hard sell that the current OTAs have what it takes in terms of differentiation to outshine Google future booking platform if it ever comes to that.

moving away from what OTAs currently provide. This is why we believe that the financial market might just be catching up on this change in paradigm in the travel industry and judging OTAs current business models as unfit for what is to come in the near future.

What consequences for hoteliers?

Let's now take a moment to think about how all this will impact hoteliers going forward. At first glance, we might think that the consequences will be negative as the global number of reservations made through OTAs will be going down. However, this is actually a unique opportunity for hotels to differentiate themselves from the crowd by adopting a strategy that answers this change in paradigm.

To help hotels achieve this differentiation and customise prices and services to the guest, new generation

selling models are flourishing on the market, a few of which are listed below:

- Upselling Solutions – These tools are designed to encourage guests to book a higher category room and/or additional services on hotels website. This allows for increased personalisation and website revenue.
- Online Concierge Services – Digital sources (i.e. app, terminal) that can be used to handle different hotel needs, from reception to drink/food orders. This can help improve guest experience and personalisation.
- Customised direct booking models – The fixed price model is dead and will be soon replaced by flexible and customised pricing models, 100% focused on the guest, like attribute-based pricing (1) and negotiation-based pricing solutions (2).
 1. “Attribute-based pricing”: a traveler picks the things they want in a room — such as a king-size bed, extra-soft pillows,

or a location on a high floor and in a quiet zone of the hotel — à la carte. Once they've selected a bundle of options, the hotel provides a custom price.

2. “Negotiation-based pricing”: a traveler picks the room they want and negotiates online the price on the hotel website.

However, it is important to remember that the biggest impact a hotel can make is achieved on an individual level, by adopting a welcoming philosophy and delivering the best possible guest experience.

Matthieu Mauguin

Matthieu Mauguin is the digital marketing manager for PrivateDeal, a Swiss company providing an innovative negotiation solution for hotels. After graduating in Marketing & Management, Matthieu decided to enter the digital travel world and now helps hoteliers drive more direct bookings and higher conversion rates with PrivateDeal. www.privatedeal.com



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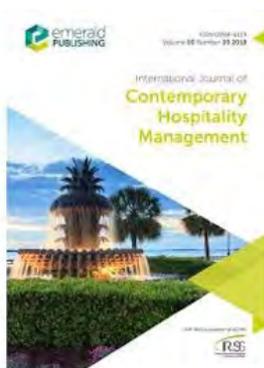
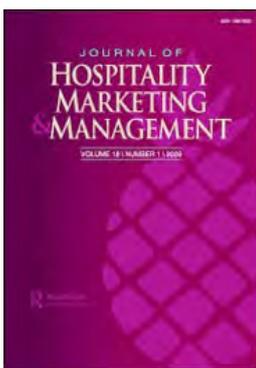


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Luxurious leisure

Five-star service now means ensuring seamless in-room entertainment and connectivity, says Joe Beaumont, Hospitality Sales Lead, Exponential-e

If you were to think about the average hotel experience in 2000, what springs to mind? An old school television that had more back-end than screen? A pile of leaflets that detailed the surrounding area? Having to phone the concierge to make a dinner reservation? That's quite different to nowadays. Jump forward two decades and a minimum expectation is that personal devices can connect to Wi-Fi. Going beyond that, guests want to use their devices to control all aspects of their room. They want to select the in-room entertainment, choosing what they stream and how they stream it; order room service; book restaurants through real-time portals updated with the most recent offers; and order late checkout at the last minute. They want to do all of this seamlessly from their phone, tablet or laptop. Yet, enabling all of these capabilities and, thus, delivering satisfaction, largely comes down to one thing – connectivity.

Consistent bandwidth is the foundation for great satisfaction

While a consumer ISP deal may just about work for a small B&B, it won't for anything larger. The only thing worse than not having an internet connection is one that provides so little bandwidth that it struggles to load a page. At least if there is no access, a guest can resign themselves to reading a book (while being annoyed that they can't get online). But that glimmer of hope of a possible connection leaves them frustratingly refreshing browsers or staring at Netflix's buffering circle.

As such, hotels need a pipeline that ensures a connection in the Gigabits per second (Gbps), which provides enough speed and bandwidth for all guests to use the internet for what they need to. Moreover, that speed needs to be delivered consistently, regardless of the number of users within the hotel. This may require hotels to split their network into multiple

dedicated tracks. For example, for guests, internal staff use and any conferencing spaces – which can see hundreds of extra network users added during events.

Usage on the providers' overall network can also have an impact on bandwidth. On consumer networks, performance is restricted at certain times to match demand. As such, access to businessonly networks is imperative as their performance isn't disrupted by consumer peaks.

Another consideration is remedying inevitable network issues. Hotels can't expect front-of-house staff to always have the technical knowledge to fix things, as it isn't traditionally an area of focus within hospitality as a career. While 'restarting the router' may resolve some very basic issues, solving larger problems requires access to the network provider's expert technical teams. So as to not majorly disrupt guest experience, hotels need access to a technical service that is available 24/7 and can quickly identify issues and resolve them remotely.

When connections are superfast consistently, guests can manage their own in-room entertainment. The use of Internet Protocol Television (IPTVs) frees them from the schedules of TV channels, enabling the uninterrupted viewing of whatever they want, including via device mirroring. There's a big benefit for hotels too. With greater access to customers through connected devices, there are more opportunities for real-time engagement. Every touchpoint can be used to enhance the guests' stay, increasing satisfaction and the likelihood of them returning.

With greater access to customers through connected devices, there are more opportunities for real-time engagement.

The lucrative, and growing, business travel industry

According to the Global Business Travel Association, business travel expenditure is predicted to reach £1.3 trillion by 2022. With so many trips being made, hotels can't afford to not be equipped for corporate visitors. Just as with leisure guests, they expect seamless and consistent connectivity. They need to be able to check their emails effortlessly, work on the presentation for tomorrow's big meeting, or join the weekly conference call. If a hotel can't let them do that easily, they won't come back.

Similarly, the duty of care responsibility for employers when employees travel on their behalf is largely reliant on connectivity and hugely important. As business travel takes employees further afield, organisations must be able to monitor their wellbeing and contact them in an emergency easily. Calling the hotel and asking to then be put through to a specific room should be the very last resort, not the only option.

One-stop shops provide single point for expertise

Ensuring guest satisfaction involves many parties working in sync. The hotel staff, network provider, IT technicians and entertainment applications represent just a few, but all of them need to be managed, which becomes more complex as hotels scale to match rising demand. As such, hotels can experience greater efficiency if they seek partners that can provide more than one area of expertise. When a supplier can provide a one stop shop for ensuring network connectivity and continued tech support, and the provision of in-room entertainment content, for example, it means hotels are able to focus on what truly differentiates them – delivering first class customer service and satisfaction.

Joe Beaumont, Hospitality Sales Lead, Exponential-e.

Call for support on new migration plan

Business leaders in hospitality think the sector needs better support on immigration to avoid crippling labour shortages.

That is one of the findings emerging out of CGA's 2020 Business Leaders' Survey, the annual gauge of what the industry thinks. The poll reveals widespread concerns over a points-based system of immigration, and support for temporary visas to help fill vacancies in restaurants, pubs and bars.

The results reinforce alarm across the industry over the impact of the government's new plans on immigration, which will see a new points-based system brought in from January 2021. The proposals reduce the salary threshold for employing skilled workers from overseas, but so far indicate no route into the UK for general low-skilled or temporary workers.

CGA's Business Leaders Survey, run in partnership with Fourth and conducted before the plans were announced, reveals two in five (41%) leaders think a points-based system for immigration would have a negative impact on hospitality—twice as many as think it would have a positive impact (21%).

The poll confirms fears that the plans will make it harder to fill roles in an industry that heavily depends on overseas labour. Three quarters (77%) of business leaders think labour shortage areas should be taken into consideration when setting criteria for potential workers—significantly higher than any other factor, like language skills (56%), skilled work experience overseas (40%) or offers of employment (38%).

The Business Leaders' Survey also reveals support for a system of temporary visas to ease pressure on labour shortages. Two thirds (66%) of leaders think a temporary visa should last for either 24 or 36 months—and just 8% don't consider it to be a viable solution on immigration.

CGA group chief executive Phil Tate

said: "We know that staff shortages are a huge concern for many restaurant, pub and bar operators, and the new proposals on immigration are only going to make things worse. A points-based system could dramatically affect access to labour, which would hurt investment, weaken the high street and—because we know that service and customer satisfaction are closely intertwined—ultimately reduce the pleasure of eating and drinking out. Our Business Leaders' Survey shows the strength of feeling about freedom of movement in our industry and should remind the government of the damage it could do to hospitality if these proposals go ahead."

Mike Shipley, Vice President of analytics at Fourth, said: "This latest announcement on immigration brings much cause for concern across all sectors in the hospitality industry. Given that 53% of our industry's workforce is made up of overseas workers, the new legislation is set to have a catastrophic impact on the available pool of pub, bar, hotel and restaurant workers. Furthermore, this doesn't take into consideration the specific nuances of the hospitality industry, such as tips, which are not included in the calculations for the new thresholds.

"The announcement comes after the government announced further increases to the NLW in April, which is a double blow for the industry. The already extensive pressure on wages will be further exacerbated by a shrinking pool of workers as the tap of new labour from Europe is turned off, presenting a mountain of rising labour costs for operators to climb. To combat this era of unprecedented wage inflation, it's absolutely imperative that operators gain a true understanding of the current make up of their workforce, as well as looking at ways in which they can

harness the power of technology and data to be more economical and efficient with how they deploy labour."

Commenting on the proposed new immigration system, UKHospitality Chief Executive Kate Nicholls said: "Ruling out a temporary, low-skilled route for migration in just 10 months' time will be disastrous for the hospitality sector and the British people. Business must be given time to adapt.

"These proposals will cut off future growth and expansion and deter investment in Britain's high streets. It will lead to reduced levels of service for customers and business closures. Hospitality is already facing an acute labour shortage, despite investing significantly in skills, training and increasing apprenticeships for the domestic workforce. We are facing record low levels of unemployment, a dip in young people entering the labour market and have the highest vacancy levels of any sector.

"This announcement fails to recognise that hospitality is at the heart of every community in the UK. Damaging the hospitality sector will have a knock-on effect for schoolchildren and the elderly who rely on the sector for their meals. The Government says it is making allowances for staff in the NHS, but it has totally ignored the catering companies who supply the meals to patients and staff.

"We understand the Government's desire to deliver on the referendum result and its aim of moving to a skills-based immigration system. We fully support the ambition to upskill the domestic population and provide opportunities for people in every part of the UK. These proposals fail to deliver on the Government's own objective of providing an immigration system which works for the UK's economy and its people."

Between Brexit and the Coronavirus, what's the impact on your hotel bookings?

The UK has finally left the E.U., and the concerns of Coronavirus are altering travel patterns, so the question on all of our minds is... what impact will this have on my business? The latest forward-looking data from Amadeus will help put you at ease.

The GDS channel demonstrated stability and sustainable growth

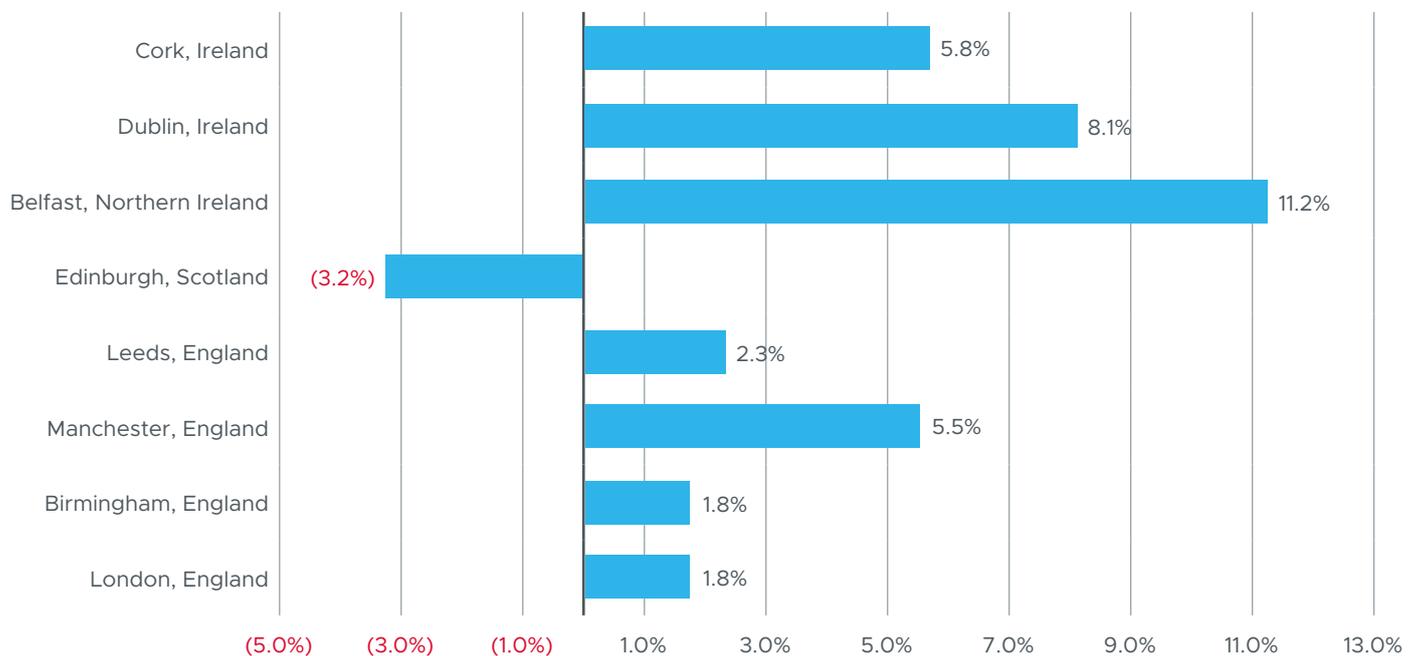
2019 was a record-breaking year for Global Distribution Systems (GDS), with a 2.5% growth in bookings YOY. Major cities in the UK like Manchester

and Belfast posted strong numbers as well as the Republic of Ireland, which saw 7.6% more GDS room nights booked last year. And there's no sign of slowing down in 2020, as record numbers are expected from this channel in these markets. Hoteliers should take advantage of this by using data to

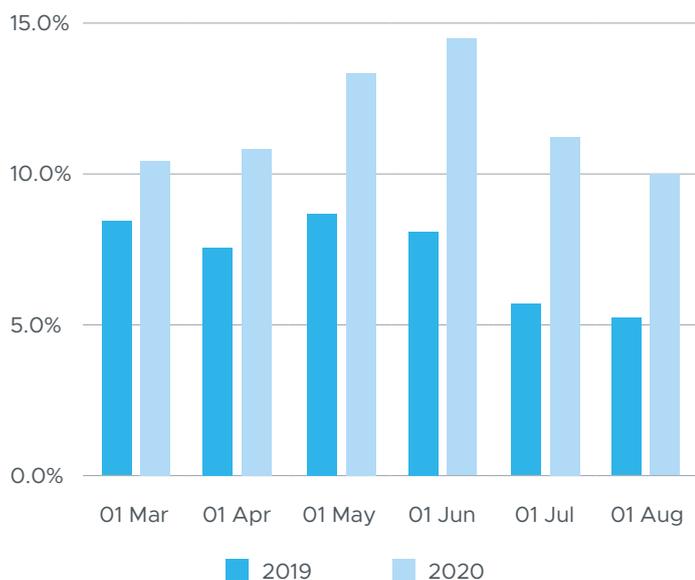
attract guests and win more bookings from direct competitors.

But it's not just about how many bookings are being made, you should also think about how long guests are staying for. The current hotel average is 1.88 days and fluctuates by season, with people travelling longer in the summer and shorter

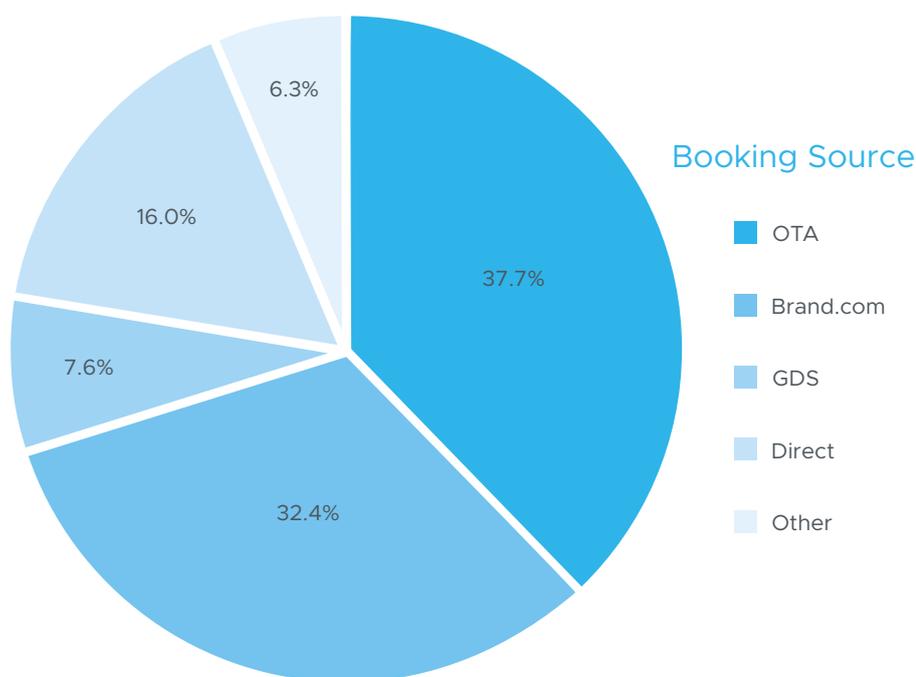
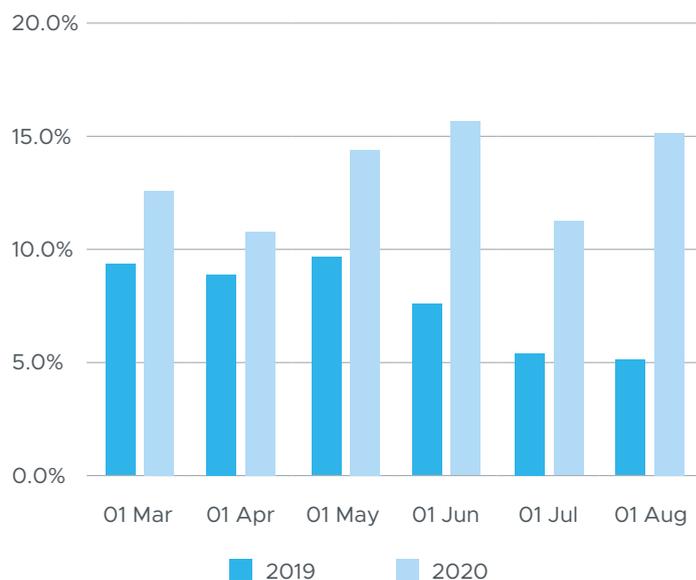
Room Nights YOY (2019 vs 2018)



Group Occupancy as of January (UK)



Group Occupancy as of January (Ireland)



don't lie, and OTAs are not going anywhere, with 37.7% of bookings expected from this channel in the next six months. Hotels can benefit from millions of potential reservations coming from OTAs, so it's important to have a healthy channel mix combined with the latest technology to increase visibility, loyalty, and ultimately drive more direct bookings to your website.
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in the winter. For those of you looking to increase the average length of a guest stay, data can expose key opportunities to run a promotion that will entice guests into booking additional nights.

The weather might be grey, but group occupancy is looking bright in 2020

When we look at the next six months, group occupancy, we see an increase of 4.4% in the UK and 5.7% in Ireland. Whilst this number normally drops during the summer, occupancy will

continue rising in 2020. With so many group bookings, it's important for hotels to think about their revenue management strategy. Amadeus recommends tightening rates on high group days to help maximise revenues from transient business.

OTAs and Brand.com accounts for 70% of transient bookings

There is good news here for hoteliers, as almost a third of bookings are direct through Brand.com. But the numbers

It's not just about how many bookings are being made, you should also think about how long guests are staying for. The current hotel average is 1.88 days and fluctuates by season, with people travelling longer in the summer and shorter in the winter. For those of you looking to increase the average length of a guest stay, data can expose key opportunities to run a promotion that will entice guests into booking additional nights.



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Tierney's Office Automation Ltd. are regarded as a leading IT provider within the hospitality sector across the UK and Ireland. Offering a premium level of service to all our clients, Tierney's specialise in providing IT systems and solutions across the hospitality industry whilst giving clients the peace of mind that their IT is supported, maintained and monitored 365 days of the year.

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Are day-to-day hotel operations killing the guest experience?

Hotels have incredibly complex operations and being able to tackle all the details can have a huge impact on both guest experience and retention. The right technology simplifies operations, optimises team communication and gives managers the information they need for a fully booked hotel.

Hotel guests are no longer simply holidaymakers but users in a vast online ecosystem. With an increasingly common review-culture, guaranteeing a 5-star stay is not only an indicator of how likely you are to attract new bookings but its a mandatory requirement in your customer engagement strategy.

In order to achieve 5-star reviews, we often think of delicious poolside

cocktails, beautifully decorated rooms or a sumptuous bed waiting for us to dive into; however, the details that truly make a difference run much deeper than that and make up a lot of the hotel day-to-day: maintenance activities.

It's no surprise that hotels are some of the most complex operations around, and the maintenance staff are basically the invisible heroes that make 5-stars reviews possible. A study by the Cornell

University noted that Guest Room and Facilities represent 43% of the factors driving satisfaction scores among guests, and over 70% of reported guest problems are engineering, most of which are room-related issues (such as HVAC, locks, plumbing).

Housekeeping teams are usually the first to spot issues as they have direct access to the rooms, equipment and interact with guests. Then, they report these issues to the maintenance team on paper at the end of the shift. In the case of a guest complaining directly at the hotel reception and the maintenance team receives a phone call.

This leaves a lot of room for information to be either omitted or miscommunicated and in some instances will require a 2nd visit to rectify.

Using technology to automate these processes simplifies operations, optimises team communication and ultimately, generates more revenue. Maintenance issues are inevitable in a hotel, but having the right tools, structures, plans, and schedules can reduce the problem frequency, extend the useful life of assets and, more importantly, collect valuable data that drives intelligent operations. And intelligent is a keyword nobody should ignore.

"Having a solution that allows managers and owners to access that information in a smart and easy way is key. They can be in control of everything that is going on without even being on-site."



There are even technological solutions that go further the extensive range of modules and functionalities to offer a real critical advantage: the ability to customise the solution to the way each hotel works.

Felipe Ávila da Costa, CEO of Infraspak, one of the market leaders in hotel maintenance management platforms says: "Having access to high-quality information brings a competitive edge to any business and it is definitely key to making truly intelligent decisions. Having a solution that allows managers and owners to access that information in a smart and easy way is critical. They can be in control of everything that is going on without even being on-site. On the other hand, technicians know exactly what they are supposed to do, anytime and anywhere and are well prepared for it".

In fact, the benefits from introducing operations to the right technologies go far beyond the convenience of access to information, portability and offline access. Technology has been the main

driving force in delivering benefits in terms of quality of life. When it comes to working with people, reports and constant new maintenance requests, then this translates into much less time spent in administrative work, a drastic reduction on paper consumption (reducing costs, time spent going through archives and CO2 emissions) and the optimisation of internal communication processes.

"One of our clients, InterContinental Hotels, has managed to reduce

phone calls between technicians and management by 75% with Infraspak, from 40 to 10 per day. This ultimately resulted in 40 hours per week saved in administrative work and much greater control over time and costs for both preventive and corrective maintenance. Results like these have a direct positive impact not only on the hotels' equipment, facilities, and management but also on guests' experience", adds Felipe.

Although new technological solutions can often take time to be adopted among teams, the truth is that they can end up being the best way to increase employee retention rates, make the day-to-day of operational teams much easier and, ultimately, lead to a higher quality of life for managers and hotel staff everywhere. In an industry with such deep operational complexity, managing to create and run a team that works like clockwork, knows its surroundings and is motivated can really make a difference, and our reviews show this.

It's no surprise that hotels are some of the most complex operations around, and the maintenance staff are basically the invisible heroes that make 5-stars reviews possible.

HOSPA

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Professional Development

Learn more about Revenue Management with HOSPA

This **modular programme** is delivered online and provides an opportunity to study in-depth the revenue management strategies and techniques applicable to the hospitality sector. You will benefit from:

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- ✓ Free subscription to the online **Journal of Revenue and Pricing Management**
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- ✓ Relevant and practical work based learning
- ✓ HOSPA Associate (Cert Revenue Management) **membership** on completion of the full programme
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Food boost to consumer spending

Consumer spending grew 3.9% year-on-year in January, marking a distinct uplift from the low levels of growth seen in 2019, according to Barclaycard. Consumers, the group said, were feeling upbeat about the country's economic prospects, with three quarters confident about their household finances.

Data from Barclaycard revealed that spending on essential items rose by 3.7%. Rising prices at the petrol pump drove much of this growth, with fuel spending increasing by 4.3%. Supermarket spending was also a contributory factor, with the category up 3.7%.

Spending on non-essentials was another bright spot, growing 4.0%. Pharmacy, health and beauty stores experienced growth of 5.9% as consumers pursued healthier lifestyles at the start of the new year. Elsewhere, entertainment remained robust at 6.8% growth, as a strong opening for box office-topping 1917 helped cinema spend climb 22.0%. Spending at travel agents and airlines also increased 4.2 and 3.2% respectively, as consumers looked ahead to their next holiday.

The chilly weather kept Brits indoors, with spending in restaurants falling for the third month in a row, by 3.5%, while takeaway expenditure grew 11.4%. In a trend seen for several months, clothing stores also continued to see a decline, with the sector decreasing 2.2%.

The chilly weather kept Brits indoors, with spending in restaurants falling for the third month in a row, by 3.5%, while takeaway expenditure grew 11.4%.

Electronics stores also contracted by 1.4%.

Consumer confidence is on the rise, with four in 10 (42%) of consumers upbeat about the country's economic prospects, the most positive figures reported since September 2016. Three quarters (74%) also feel confident about their household finances, the highest seen since February 2019.

Looking ahead, however, over half of UK adults (51%) believe the pace of economic growth could decline in the next few months. Consumers are also thinking carefully about the most responsible way to spend their money. More than half (56%) said they have become more conscious of their

personal impact on the environment and consequently intend to change their behaviour. A third of shoppers (33%) also plan to buy fewer plastic goods. A focus on maximising value continues to be evident, with spending at discount stores up 9.5% in January.

Esme Harwood, Director at Barclaycard, said: "Consumer spending has had a boost in January, and we've also seen confidence in the economy grow. Brits are planning holidays and enjoying box office hits. Traditional retail continues to face challenges though. How retailers respond to consumer demand for value for money and responsible shopping will be key."



Climate change hits fruit prices

This month seven out of 10 categories saw month-on-month deflation in December - a remarkable number for the festive period, which is historically a time of food price increases.

The Soft Drinks and Fruit categories saw large falls month-on-month, at -16.4% and -10.2% respectively. The Fruit category is still seeing huge increases year-on-year, with a +10.3% rise on December 2018. This increase is largely due to multiple instances of extreme weather as a result of climate change, which have been damaging the growth and yield of fresh produce.

Spain has been hit by devastating early winter storms which have significantly damaged citrus yields and delayed many crop deliveries. The storms are particularly damaging for Valencian and Alicante Citrus, and producers have had to stop harvesting as the fruit cannot be stored in the very wet conditions due to the risk of fungal infections. This has caused a 20% reduction in the volume of oranges and up to a 50% decrease in Mandarin production in comparison to last season. This slow production of citrus crops has also been observed in other countries such as Italy and Morocco.

In stark contrast to the Fruit category, the Vegetables category is down -3.6% year-on-year. It is unusual for the fresh produce categories to be so far apart in their inflation numbers. However, due to a good harvest for both potatoes and onions the Vegetables category continues to fall both year-on-year and month-on-month. This time last year, the UK reported its smallest potato harvest for 6 years, after extreme heatwaves over the summer damaged crops. This low yield saw prices soar, which coupled with this year's high yield and low pricing, has been a major contributor to the deflation in the category.

Elsewhere, the Oils & Fats category



continues to see high levels of deflation. Good conditions for dairy production has resulted in high yields of milk, which has reduced butter pricing both locally and on the global market. This reduction in the cost of butter has done a great deal to ease the pressure of very high inflation seen across the category in 2018, with pricing in December this year measuring -11.6% lower than last year.

As usual in December, both Meat and Fish prices saw a particular surge during the month.

Spain has been hit by devastating early winter storms which have significantly damaged citrus yields and delayed many crop deliveries. The storms are particularly damaging for Valencian and Alicante Citrus.

UK Hoteliers Turn the Page After Uneven Profit Performance

2019 ended on a sour note for UK hotels. According to HotStats data, December marked the third consecutive month of year-over-year profit per available room decrease, as GOPPAR was down 0.9%. In sum, there were nine months in 2019 that saw YOY GOPPAR contraction.

Average rate (up 2.5% YOY) drove rooms revenue growth in December, leading to a 0.1% YOY uptick in RevPAR despite the 1.7-percentage-point YOY drop in occupancy. Ancillary revenue, on the other hand, fell by 0.7% compared to December 2018, mostly due to a 2.1% decline in F&B revenue per available room. As a result, TRevPAR recorded a 0.2% YOY decrease.

UK hoteliers were able to keep overheads under control in December, placing 4.5% below the same month of 2018. This reduction was led by a 2.5% YOY drop in utility expenses. However, the 3.8% increase in total labour costs on the back of shrinking revenue took a toll on profitability. Thus, GOPPAR for the 2019 financial year closed 0.8% below that of 2018.

Profit conversion in the UK was recorded at 38.4% of total revenue in December.

Conversely, the city of Bristol marked

its eighth consecutive month of profit per available room YOY growth in December, at 5.7%. This increase in profit was achieved despite a contraction in revenue.

A 3.2-percentage-point plunge in occupancy drove RevPAR down 1.4% YOY, despite a 3.5% YOY increase in average rate. A further 0.7% YOY drop in ancillary revenue resulted in a 1.1% fall in TRevPAR compared to December 2018.

Even though overheads increased by 2.6% YOY, the ability of Bristol hoteliers to flex labour costs enhanced their profit in the context of diminished revenue. The contraction of both rooms labour costs (down 5.1% YOY) and F&B labour costs (down 8.9% YOY) placed December total payroll 1.3% below the same month of 2018. Consequently, GOPPAR for the financial year 2019 was 3.4% higher than 2018.

Profit conversion in Bristol was recorded at 33.3% of total revenue in December.

Results were bleaker in the city of

Northampton, where December marked the 11th month (ninth in a row) of YOY GOPPAR decrease, at 5.0%.

Declines in occupancy (down 0.9 percentage points YOY) and average rate (down 3.7% YOY) resulted in a 5.0% plunge in RevPAR compared to December 2018. Ancillary revenue was also part of this downward trend and recorded an 8.1% YOY fall. Consequently, TRevPAR dropped by 6.6% YOY.

The silver lining is that expenses also contracted in this period. Fueled by an 8.3% fall in F&B payroll, total labour costs were reduced by 9.1% YOY. Also, a 10.9% fall in utility expenses helped bring overheads down by 18.7% YOY. However, this was not enough to offset the dwindling top-line, and GOPPAR for 2019 placed 11.4% below 2018.

Profit conversion in Northampton was recorded at 30.8% of total revenue in December.

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

KPI

December 2019 v December 2018

RevPAR: +0.1% to £90.43

TRevPAR: -0.2% to £150.42

Payroll: +3.8% to £42.43

GOPPAR: -0.9% to £57.76

Profit & Loss Key Performance Indicators – Bristol (in GBP)

KPI

December 2019 v December 2018

RevPAR: -1.4% to £56.17

TRevPAR: -1.1% to £100.06

Payroll: -1.3% to £29.25

GOPPAR: 5.7% to £33.28

Profit & Loss Key Performance Indicators – Northampton (in GBP)

KPI

December 2019 v December 2018

RevPAR: -5.0% to £44.62

TRevPAR: -6.6% to £90.83

Payroll: -9.1% to £23.62

GOPPAR: -5.0% to £27.98

Pubs, bars and restaurants start 2020 on a positive note

Britain's managed pub, bar and restaurant sector has kicked-off the New Year on the front foot, with collective like-for-like sales up 1.9% in January compared to the same month last year, latest figures from the Coffe Peach Business Tracker show.

“Reasonably good weather, in particular the lack of snow, will have helped sales, but nonetheless it is encouraging to see that the public is continuing to go out to eat and drink,” said Karl Chessell, director of CGA, the business insight consultancy that produces the Tracker, in partnership with The Coffe Group and RSM.

Regionally, London had a tougher time but still saw like-for-likes ahead 0.7% compared to 2.3% outside the M25.

Restaurant groups saw the biggest increase in January, with like-for-likes up 2.5%, driven almost entirely by strong sales outside of London. Managed pubs saw like-for-likes grow 1.7% over the month, while bar operators were also up, although by only 0.9%.

January's positive results come on the back of strong trading over the festive period, which saw collective like-for-likes up 2.5% against the previous year.

Trevor Watson, executive director at Davis Coffe Lyons, said: “To put these figures in context, last January the market saw a 1.8% drop in like-for-likes against 2018, so essentially we are back to where we were two years ago. But it does show an underlying stability in the market, despite the political climate and what has been going on in the wider economy. The eating and drinking out market is showing resilience and people's appetite for going out remains intact.

“There is a universal feeling of improved

investor confidence, however, this has not yet translated into deal flow. The stabilised consumer confidence combined with a stronger investor mentality is likely to result in steady improvement as the year progresses. We are off to a decent start,” Watson concluded.

Paul Newman, head of leisure and hospitality at RSM, said: “A year-over-year sales boost is a welcome reward for the many pubs, bars and restaurants who refined their New Year offering to capitalise on the trends for Veganuary and alcohol alternative drinks. Any sales increase will

be welcomed by a sector that still faces tremendous cost pressures, particularly around people, business rates and food prices. Operators will eagerly await any news on the easing of such costs from Sajid Javid's upcoming budget announcement.”

“Underlying annual like-for-like growth for the Tracker cohort, which represents both large and small groups, was running at 1.6% at the end of January,” said Chessell.

Total sales for the month, which include the effect of new openings since this time last year, were ahead 4.7% compared to same period in 2019.



Upcoming Events



Revenue Management Networking event

Strand Palace, 372 Strand, London, WC2R 0JJ
6.30 - 8.30pm

This will include a panel discussion on current trends in Revenue Management, moderated by Michael Heyward, HOSPA board member and Revenue Management specialist.

Michael will be joined by key RMS solution suppliers, who will then be available for one to one product demonstrations during drinks and networking.



HMA Awards

St Pancras Renaissance Hotel, London

In 2020, the HMA are celebrating two magnificent landmarks: the 50th anniversary of the Hotel Marketing Association and the 25th occasion of its awards, aimed at recognising best practice in Marketing within the UK hotel industry and the best young talent.

All award categories are as relevant to branded chain hotels and groups, as they are to independent hotels.

Entrants don't need to be a member of the HMA, and, thanks to our sponsors, the awards are free to enter.

We are happy to receive entries from agencies, so long as they have secured agreement from their client. You can also enter a campaign or activity in as many categories as it is relevant to!



Finance Update

BDO offices, 55 Baker Street, Marylebone, London, W1U 7EU
8.30 - 10.30am

BDO Finance Update, Breakfast Seminar

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

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



Innovations In Technology

Central London
6.30 - 8.30pm

HOSPA and the HMA associations are delighted to host a joint members Networking event themed Innovations in Technology. The event will take place in Central London. Further details to follow.



Annual Hotel Conference

Manchester Central Convention Complex

The Annual Hotel Conference is a conference for hoteliers; individual, boutique, branded and consortium hotel owners, operators and managers segment of the industry. It is a must-attend for all those involved in this, the largest sector of the hotel industry. Joining hoteliers at the event are developers, architects, consultants, marketing and social media experts, investors, bankers, advisors and government agencies who all gather to learn, network and do business in a forum which deals with the issues of the day.



The Independent Hotel Show

Olympia London

A firm fixture in the calendar of independent hoteliers and industry professionals alike, the show presents a curated collection of over 350 innovative product and service providers from across the hotel supply chain. Together with expert insight from a Seminar Programme and multiple networking opportunities, the Independent Hotel Show is designed to satisfy the demands of hoteliers committed to improving their business.



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Our one-day annual international conference and gala dinner hosted by HOSPA.

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

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- ✓ Increase brand awareness, generate new sales and acquire new customers.
- ✓ Engage in unrivalled networking opportunities.
- ✓ Conduct face-to-face engagement with key industry decision makers and clients.
- ✓ Be part of the UK's only organisation representing senior professionals in the hospitality industry.
- ✓ HOSPA offers a vast array of sponsorship opportunities running across our platforms including HOSPACE our annual conference and exhibition.

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