SHAPING THE FUTURE
of hospitality and tourism

British Hospitality Association
Annual Report 2013/14
Hospitality is a driver for jobs in every part of the UK.

Top 20 Parliamentary Constituencies in hospitality employment contribution terms

Hospitality industry's % share of total employment

Regional averages
- Scotland: 9.2%
- Wales: 9.2%
- England: 8.3%
- Northern Ireland: 7.3%
- UK: 8.4%
A warm welcome


The BHA is the leading agenda-setter and members organisation for the hospitality and tourism industry.

Our role is to promote the interests of operators, brands and owners across hotels, restaurants and food service, serviced apartments, clubs and visitor attractions.

Together our vision is to shape the future of hospitality and tourism as a driver for international competitiveness, economic growth and valuable careers – to ensure British hospitality and tourism is the best in the world.

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Hospitality is Britain’s 4th largest industry and delivers £52.7 billion (at 2009 prices) annually to the economy in Gross Value Added (wages and profits).

The Big Hospitality Conversation is the industry’s biggest job creation drive to offer 60,000 new career opportunities for young people in the UK by 2016. It is the voice of job creation for young people and in the past two years has already generated over 34,000 pledges to allow young people an entry into high quality jobs, apprenticeships and work placements.

A community of visionary leaders, who play their part in advancing our industry. An organisation for brands, operators and owners of all hospitality and tourism businesses.

The voice of job creation for young people.
£53,000,000,000
ANNUAL CONTRIBUTION

32,000
OVERSEAS VISITORS

300,000
JOB OPPORTUNITIES

ONE AGENDA
A powerful community of leaders...

Our members feature businesses from all sectors of the hospitality and tourism economy, providing a vibrant and powerful community for big and small, established and growing hospitality and tourism businesses.

We seek to generate important connections for members that will positively impact the future of our industry, every day business operations and members own personal career paths.

From cost efficient partnership deals to sharing know-how and intelligence, networking and training events, we seek to connect the hospitality economy.

...shaping the future of hospitality

Our vision is to champion the UK hospitality and tourism industry as the best in the world. We will do this by bringing together hospitality and tourism businesses with Government to deliver three clear aims: to secure valuable new jobs for our people, growth for our industry and competitive advantage for our country.

The causes which most matter to the hospitality community are the backbone of our work.

What we believe in

Our core campaigns

Driving competitiveness
Demanding of Government the initiatives which will allow the UK to be more competitive internationally, including lobbying for deregulation, Cut Tourism VAT and improved visa policies.

Inspiring the next generation
Our mission to create new hospitality jobs and demonstrate the value of those jobs to the UK economy.

Responsible hospitality
Set, achieve, maintain and communicate the highest standards and achievements to the industry and its customers.

Food source and safety
Explore different approaches to food security including food safety management and responsible sourcing and food tourism initiatives. The Association, through its Food Experts Group, National Restaurant Group, The Restaurant Association and Food and Service Management Group, will continue to work closely with the Food Standards Authority and Government (DEFRA).

Trends and developments
Understanding and capitalising on the regional, national and global trends which will impact the evolution of our industry including customer research and the general election manifesto. In late 2014 we will be creating a research council of members and partners to co-ordinate the next trends and developments report. This is a call to action for people who would like to join this council.
As the UK economy begins to see the green shoots of recovery, now is a crucial time for our industry to step up and make good on the preparations for growth that were made in the tough times.

In the past year we saw how unemployment figures contrasted with impressive job creation from the hospitality industry, while we lobbied extensively on the need to establish a Ministerial Council to champion our industry across Government, reduce tourism VAT and to reduce visa barriers for Chinese tourists.

As an industry we have always had one eye on the future and one on the past. We communicate and lobby; we learn from experience and we champion growth, change and innovation. We embrace the future generation through job creation.

We will continue to work collaboratively to find solutions to the issues and challenges which stand in the way of economic growth and job creation.

As the hospitality economy grows, our impact and voice can only strengthen. Politicians and mandarins are now gearing up for the 2015 general election, so it is more important than ever that as an industry, we rise above the competition with one united voice, showcasing our successes and demonstrating the significant economic impact that can be delivered.

Over the past year the BHA, in collaboration with members and the wider hospitality economy, has scored great successes for our industry and our political capital has never been higher.

We want the UK hospitality and tourism industry to be recognised as world class. We will do this by connecting Government and industry leaders to focus on securing valuable new jobs for our people, growth for our industry and competitive advantage for the UK.

I want to thank all the leaders, future talent and committed supporters who make up our membership, together with our partners and sponsors and the BHA in-house team for their commitment and passion in making positive changes to benefit and shape the future of the industry.
Chief Executive’s review

The best way to predict the future is to shape it, and as an industry we have the talent, capability and incentive to create a strong and vibrant future.

In fact, with the general election on the horizon, now is the time for our leaders across the hospitality and tourism sphere to work collectively towards a shared vision, utilising joined up thinking to future proof our industry.

The BHA strategic objectives during the year aim to deliver the change that most matters to the brands, owners and operators who have a vision for the strongest possible industry. These objectives are job creation, global competitiveness, setting and maintaining high standards and innovation. To deliver these objectives we’ve focused our efforts on core campaigns. Each campaign has a collective of experts, business leaders and partners who collaborate on driving insight, awareness and change.

In our lobbying role, the BHA continues to work with Government to focus on creating a co-ordinated task force to ensure joined up thinking and action for the industry across areas such as jobs and growth, airport and infrastructure, visas, food security, VAT and regional marketing.

While collaboration is key to our industry’s growth, so too is the need to inspire the next generation and attract talent towards hospitality and tourism careers.

It is no longer enough to expect that young people will naturally gravitate towards our industry. We need to find relevant ways to attract new talent showing them that careers can be rewarding and meaningful and demonstrating career paths which develop these stars of the future.

Our work on the Big Hospitality Conversation is continuing to establish hospitality and tourism on the UK plc’s agenda for growth and the creation of 34,000 work placements, apprenticeships and jobs across 18 events is a good start. If every one of the UK’s 180,000 hospitality businesses created just one job for a 16-24 year old, youth unemployment would be cut by a quarter.

So more needs to be done to widen the net and also to demonstrate that the industry can and does offer jobs of high quality and high value.

If each hospitality business joined in our march towards shaping the future we would be unbeatable. If each business rallied around our call for streamlined regulation, policies for growth and a competitive environment for hospitality businesses to thrive, there would be no stopping us. Now is the time for action. Our political capital has never been higher and we must support the rebalancing of growth beyond London, driving exports, investment and jobs deep into local economies, as only our industry has proven it has done and continues to do.

Ufi Ibrahim, Chief Executive
Chancellor of the Exchequer George Osborne’s October 2013 announcement to simplify tourist visa applications for Chinese visitors by allowing a single application to cover both UK and Schengen requirements was a small triumph for the hospitality industry.

The BHA, led by our Chinese Visa Campaign Chairman, Stephen Cassidy of Hilton, has been proactively lobbying this issue, and campaigning for swift visa reform for some time. Madame Yu, President CITS (China’s largest outbound Tour Operator) supported the BHA’s lobbying in China and the UK. In addition, the BHA has been working with the retail community and directly with the Home Office and UK Visas and Immigration to identify the solutions and how simplified visa procedures would impact on the UK economy.

By 2023, China will be the largest outbound tourism economy in the world, so it is important that the UK makes every effort to welcome the Chinese traveller into our country. Simplifying the visa application system will allow us to compete internationally and ensure that we can build and strengthen the bond between the UK and China at a commercial level. However, this is just a first step and we will continue to campaign on this issue until the visa reform is fully achieved and we can welcome many more Chinese as well as Russian and Indian visitors to the UK.

The BHA is also working with the Let Britain Fly Campaign to encourage better connectivity and air access to the UK.

"2013 was certainly a landmark year for us at Merlin, culminating in our successful IPO last November. But it was also the year in which we, in the UK tourism and hospitality industry, began to find our collective voice. More importantly to use it to educate and influence Government on those topics which affect us all - like VAT and visas. The disparate nature of the industry has meant that for too long our contribution to the UK economy has not been reflected in the influence we could bring to bear. We have a way to go, but the increased profile and activity of the BHA is playing a key role in changing attitudes where it matters and in providing a platform for key players to meet and discuss our shared interests."

Nick Varney, CEO Merlin Entertainments plc

"We welcome this announcement in an area which we have urged Government to take action. This positive move recognises the significant benefits of the growth in outbound travel from China for the UK economy. IHG is a British company with over 4,600 hotels in nearly 100 countries. We have strong links with China and have had a presence there since 1984 when we opened our first Holiday Inn Hotel. This announcement is a boost to the efforts of the tourist sector to welcome more current and future Chinese guests to the UK."

Richard Solomons, Chief Executive, InterContinental Hotels Group

"We have been actively engaging with Governments and industry around the world, to campaign for faster, more efficient visa services. We greatly welcome the measures outlined by the Chancellor, knowing from our own experience in the US that changes to the visa system can have a huge impact on visitor numbers within a short timeframe, bringing immediate economic gain. It is now vital that these UK reforms are rolled out quickly and effectively and that improvements are continuous – supporting the drive to welcome Chinese visitors to the UK."

Simon Vincent, President Europe, Middle East and Africa, Hilton Worldwide
Cut Tourism VAT

The past twelve months have seen significant progress and greatly increased political support for Cut Tourism VAT, aimed at securing a 5% rate on visitor accommodation and attractions.

This included the first concentrated period of campaign coverage over the 2013 summer holidays. Thirty-five pieces of coverage were generated, including the Daily Mail and Daily Express. In response the Prime Minister made his first statement on the subject. Interviews took place on television and radio.

In January 2014 a roundtable brought together leading champions from industry and supporting MPs to discuss the strategy for the Campaign in the run up to the General Election. This resulted in the first ever Parliamentary debate on tourism VAT (February 2014). This well-attended debate saw MPs of all parties urge the Government to implement a reduction.

Though isolated, the Treasury Minister restated the Government’s opposition to the measure. The Campaign’s focus is on further increasing political and public pressure in this pre election year. At the same time discussions on Tourism VAT are taking place with the highest levels of the political parties ahead of the next General Election.

BHA members have played a key role in these achievements through promoting the cause locally and lobbying their constituency MPs. Thanks to these efforts, Cut Tourism VAT currently enjoys a growing list of over 65 actively supportive MPs, MEPs and devolved representatives.

24 (soon to be 25) out of the other 27 EU member states have a reduction for tourism VAT because the economic rationale is so strong. A UK tourism VAT reduction would not only help industry competitiveness but also benefit British consumers, workers and communities in terms of lower prices, new jobs and increased investment. Above all, independent research has shown that a reduction would actually increase revenue to HM Treasury.

Government is currently asking the UK tourism industry to compete with one VAT-arm tied behind its back. Our sector is a major provider of jobs and careers for young people, and we would be able to offer a greater number of opportunities if tourism VAT was brought into line with our EU rivals.

Dermot King, Director of Bourne Leisure

Holidaymakers’ loyalty to the UK, holiday businesses’ investment in the UK, and the passion for people felt by tourism staff, of whom I was one for a decade, deserve to be rewarded with a sensible approach (on tourism VAT).

Tessa Munt (Liberal Democrat), Wells

It is shocking that we are at such a disadvantage compared with other European countries...when the Government has the power to reduce VAT. Lindsay Roy MP (Labour), Glenrothes

I have been a big supporter of this campaign and have made my points very clear to successive ministers. I believe cutting VAT will increase levels of incoming tourism and make the United Kingdom much more attractive to visit.

Paul Maynard MP (Conservative), Blackpool North and Cleveleys

Quick facts

• A reduction would increase revenue to HM Treasury by:
  • £529 million over the first five years
  • £4.4 billion over the first decade.

• The United Kingdom, Slovakia, Lithuania and Denmark are the only EU member states without a reduced Tourism VAT rate. Lithuania will reduce Tourism VAT in 2015.

• Tourism is the UK’s sixth largest export-earner and the only export subject to VAT.

• A tourism VAT cut will stimulate growth in tourism and the wider UK economy that will generate £4 billion in GDP gains per annum.
Youth unemployment is one of the biggest challenges facing young people today and the hospitality industry has the power to help tackle this. The Big Hospitality Conversation is the voice of job creation for young people.

It is a forum for conversation and debate; a place where local hospitality and tourism businesses can meet young people and offer them hope and opportunity. The Big Hospitality Conversation is the industry's biggest job creation drive to offer opportunities for young people in the UK. It is led by the British Hospitality Association and Springboard, with partners DWP, the National Apprenticeship Service and a cohort of industry leaders including Whitbread plc, Moorfield Group, Marriott, Baxter Storey, Accor and Ellerman Hotels. The Big Hospitality Conversation offers local hospitality businesses the opportunity to translate a real economic challenge – youth unemployment – into something positive. Up and down the country, businesses are sowing the seeds for their own future, nurturing young talent by creating quality work experience, apprenticeships and jobs for 16-24 year olds. It is our responsibility, as national and local employers, to support young people and show them that rewarding careers can be built in the hospitality industry. In the past twelve months, over 1,500 industry representatives have attended 18 Big Hospitality Conversation events across the UK, pledging the creation of 34,000 new job opportunities.

The Mayor of London, Boris Johnson: “Thanks to London’s international appeal as a top tourist destination, hospitality is one of the city’s boom industries and it is superb to have the support of the British Hospitality Association.”

Patrick Dempsey OBE, MD Whitbread Hotels and Restaurants and Chairman of the Big Hospitality Conversation: “Hospitality is a vibrant growing industry with a lot to offer...There is a huge pool of talent in the 16-24 age group and we are committed to helping raise awareness amongst the one million young people that are unemployed, not in education or training, offering significant opportunities for them to join and develop their careers within the hospitality industry. We will train young people, provide them with qualifications and long term prospects within a sustainable and thriving industry....We welcome the support of the Tourism Minister to the ‘Big Hospitality Conversation’ and for supporting us in raising awareness of the job and career opportunities that exist within our sector.”

Helen Grant, Minister for Tourism: “Working in the tourism and hospitality sector can offer a rewarding, challenging and fulfilling career and the British Hospitality Association’s Big Conversation initiative is playing a part in highlighting the opportunities available to young people.” Subsequently the Minister said: “The commitment of the hospitality and tourism industry to creating jobs and supporting young people has been brought into sharp focus by the British Hospitality Association’s Big Conversation.”

Thomas Dubaere, Managing Director, Accor UK and Ireland: “We are keen to highlight the vast opportunities that hospitality has to offer young people in the UK. We have welcomed the chance to discuss this with the Minister and hope we have been able to show the real difference that hospitality can make to unemployment through apprenticeships, structured work placements and job creation.”

Mark Hoban, former Minister for Employment: “The collaboration between Jobcentre Plus and the British Hospitality Association has been extremely successful, and it’s fantastic to see the industry come together...to create 30,000 opportunities for young people.”
The Responsibility Deal Pledges, made by hospitality operators in relation to providing calorie information, stopping the use of trans fats and reducing salt consumption, demonstrate the work members undertake in contributing to helping consumers make choices which enable them to have a healthy balanced diet while still enjoying the food provided by food services.

New salt pledge
A new pledge to reduce salt in restaurant meals with a deadline of December 2017 has been developed with a revised and limited number of product categories and targets on the basis of feedback received. The aim is to offer the right balance between challenging the industry to do more while recognising the challenges involved in further reducing the salt content of some food categories.

When a business signs up to the new pledge, it will do so on the understanding that it is agreeing to work towards all relevant categories in its portfolio. In addition, there will be no separate new product maximum targets.

Flexibility has been introduced to the pledge in terms of what constitutes “achievement of success.” The BHA, through representation on the Department of Health’s Plenary Board and High Level Steering Group, has had a key role to play in ensuring flexibility of the salt pledge to ensure that members are in a position to sign up.

E Coli 0157 Guidance Review and Industry Guide
The final version of the E Coli 0157 cross contamination guidance has been produced by the FSA’s working group which has met throughout the last year and received input from the BHA Food Experts Group. The guidance will be incorporated into the Catering Industry Guide to Good Hygiene Practice which is currently under development by the BHA Food Experts Group. The Industry guide should be completed by the autumn.

Food source and safety
The horsemeat incident which damaged consumer confidence in food in the UK was a key focus for BHA members in the year and food authenticity will continue to attract attention from the media and consumers in the future. The Association, through its Food Experts Group, will continue to work closely with the FSA and DEFRA taking steps to advise members on guidance to prevent, as far as possible, future incidents.

Research - Country of Origin labelling (VCoO!
DEFRA is funding a research project to examine the barriers to implementing the voluntary principles of Country of Origin labelling in the Hospitality Industry and how these barriers can be overcome. A steering group has been set up to oversee the project and the BHA is represented on the group. The main aim of the research is to establish costs and benefits associated with providing VCoO! in the catering and hospitality sector, consumer attitudes and how barriers to the provision of information can be overcome. It is anticipated that the research will be completed by the end of the summer and the findings should then inform DEFRA’s policy initiatives.

DEFRA Horsemeat Review
Professor Chris Elliott has led an independent review of Britain’s food system in light of the recent horsemeat fraud for the Department of Environment, Food and Rural Affairs and the Department of Health.

It examined the causes of the systemic failure that enabled the horsemeat fraud; the roles and responsibilities of businesses throughout the food supply chain to consumers; and how to support consumer confidence. The BHA has given evidence to the review and has had discussions with the Food Standards Agency and Government (DEFRA) officials on implementation of the recommendations in the interim report including the setting up of an Intelligence hub in the FSA.

There is an important role for Trade Associations in acting as a conduit for the transfer of information from Industry to the FSA and we have discussed implementation of the Elliot review following the final report. The BHA Food Experts Group will discuss with DEFRA and the FSA including a section on Food crime and authenticity in the Industry Guide to Good Hygiene Practice.

EU Food Information regulation - FSA Allergen Guidance for SMEs
The FSA is developing a leaflet to advise small and medium enterprises on compliance with the Food Information Regulation which will come into force on December 14th 2014. The BHA Food Experts Group will develop a section on food allergies in the Industry guide to Good Hygiene Practice.

BHA and ADBA urges businesses to reduce food waste
WRAP’s Nov 2013 report into food waste in the hospitality sector valued the true cost of food waste to the hospitality industry at £2.5 billion, making efforts to reduce it well worthwhile. But even the unavoidable fraction is a valuable resource, which both the British Hospitality Association (BHA) and the Anaerobic Digestion and Biogas Association (ADBA) have committed to make best use of through anaerobic digestion (AD).

At the first ADBA AD & Hospitality Conference, held Friday 7 February at the Royal Garden Hotel, London, Charlotte Morton, Chief Executive ADBA said: “Source segregation is an important place to start for the hospitality sector. Separating the food waste portion from the general waste and seeing what is actually being thrown away helps businesses reduce waste food in the first place – by far the best option and eight times better even than AD for the environment. Once the unavoidable food waste element is separated out, the AD industry can turn this into an ultra-low carbon renewable gas and valuable bio fertilisers, helping to support the UK’s energy and food security.”

John Dyson, Food and Technical Affairs Adviser, BHA, said: “With food prices a significant cost for hospitality businesses, the focus for our sector is first and foremost to reduce the volume of food waste produced. But there will always be some portion that cannot be avoided – that’s why the BHA partnered with ADBA to highlight the benefits of anaerobic digestion as a treatment option for the remaining unavoidable food waste. The first ADBA AD & Hospitality Conference has provided an important step in bringing the two sectors more closely together.”
**Summary of achievements**

We continue to lobby on behalf of our members and the hospitality economy. Our aim is to support your businesses so that you can operate without the increasing regulatory and financial burdens that hinder growth and profitability.

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<th>Issue</th>
<th>Achieved</th>
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<tr>
<td><strong>jobs</strong></td>
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<tr>
<td>Hosted 18 Big Hospitality Conversations resulting in over 34,000 job opportunities to date</td>
<td>✔</td>
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<tr>
<td>Jointly hosted press conference with London Mayor Boris Johnson to announce job creation opportunities at National Apprenticeship Week</td>
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<td><strong>growth</strong></td>
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<td>Working with Government and industry to set in place the Tourism Council</td>
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<td>Hosted second Hospitality and Tourism Summit which was attended by 600 industry leaders with media coverage on BBC TV news and leading national, regional and trade titles</td>
<td>✔</td>
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<td>Negotiated a partnership with ITN to create an exclusive hospitality programme featuring BHA members to raise industry profile</td>
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<td><strong>competitive advantage</strong></td>
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<td>Secured increased savings from the accommodation offset to the National Minimum Wage</td>
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<td>Secured the first ever parliamentary debate on reducing tourism VAT in Westminster. 23 pro-reduction backbenchers spoke in the debate</td>
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<td>Lobbying resulted in positive changes to the visa application process for Chinese visitors</td>
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<td>Chief Executive Ufi Ibrahim appointed Chairman of The Tourism Alliance, bringing together 33 industry associations</td>
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<td><strong>member support</strong></td>
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<td>Successfully lobbied the OFT in its investigation into hotel online bookings to give hotels the same right to discount as online travel agents. Commitments came into force January 2014</td>
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<td>Though compulsory display of Food Hygiene Ratings Scheme ratings has become law in Wales, the BHA lobbied successfully for an appeals and re-inspections regime</td>
<td>✔</td>
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<td>Working collaboratively with other associations, lobbied successfully to change Home Office proposals on irresponsible promotions, which could have adversely affected dinner dances and similar functions in England and Wales</td>
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<td>Persuaded Northern Ireland Ministers to exempt all hot food carrying bags from Single Use Carrier Bag charge on hygiene grounds</td>
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<td>Lobbied successfully for fire risk assessment to be brought within Primary Authority scheme in England and Wales, allowing prospect of more consistency from fire officers</td>
<td>✔</td>
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<td>Lobbied successfully for use of remedial action notices in England not to be applied to catering establishments</td>
<td>✔</td>
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<tr>
<td>Lobbied successfully for proposals for compulsory display of Food Hygiene Ratings in England to be dropped</td>
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<td>Raised awareness on compliance issues and lack of level playing field relating to properties offered on Airbnb and similar sites</td>
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<td>Raised awareness for the issues of blackmail on recommendation websites such as TripAdvisor that can impact members</td>
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The Hospitality & Tourism Summit

The premier diary date for senior hospitality and tourism professionals, the Hospitality & Tourism Summit is the BHA’s annual opportunity to bring together members, partners, journalists, academics, colleagues and Government. In 2013, 600 delegates attended the event at the InterContinental Hotel, London Park Lane. Our two key aims were to push for improved visa access for Chinese tourists and to raise awareness of our initiatives to inspire the next generation.

The 2014 event which took place at the Novotel London West was bigger than ever. This year’s event focused on the launch of a Tourism Council with Government and industry.

When asked where they saw British hospitality and tourism progressing over the next five years, Richard Lewis, CEO of Interchange & Consort Hotels was confident that Britain would increase its industry share of the economy by 5% and create an additional 250,000 jobs with 75% of those in the under 25 age group. He has confirmed that to achieve this they will continue to operate as a retained profit organisation and deliver the very best guest service.

Christopher Rodrigues CBE, Chairman, VisitBritain said they would continue to deliver visitor record numbers and continue their campaign to Government not to over tax or over regulate one of its largest, fastest growing export industries. Gordon Innes, Chief Executive, London & Partners also sees London being a top five city in the International Association Meetings Market and envisages that London will welcome 3.8 million more overseas visitors than in 2013, an increase of 23%.

However, growth won’t be without pain. Clive Jacobs, Chairman, Travel Weekly Group says that hospitality and tourism will need support and empathy from Government. Visa access, additional runway space and a lower rate of VAT are only three of the factors that need to be addressed if operators are to flourish in the coming years.
Media relations and communications: key successes

Launch of new website with fresh copy and graphics and responsive features allowing visitors to easily browse on their smartphone devices and tablets
The popularity of the website has increased by 20% since launch
Increase in time spent per visit has increased by over a minute – visitors spend on average over four minutes

Successfully established social media presence on number of different platforms including Twitter, LinkedIn, Facebook and Google+
Increased the number of Twitter followers by 71.6%

Negotiation of a series of media partnerships to maximise both BHA events and the summit
ITN Hospitality News programme, Caterer and Hotelkeeper, BigHospitality, caterer.com, EP Magazine, Leisure Opportunities and Hotel Business

Copy and content: creating the key messages and regular comms channels
Regular industry thought pieces for Caterer.com, Hotel Business, Leisure Opportunities, Scottish Licensed Trade News, Global Hotel Network and more
An alliance with VisitEngland and VisitBritain to support destination marketing

Alliance with Twitter to launch and promote #RestaurantWeek initiative to support restaurateurs across the UK through two live educational webinars
Blog content and proactive media relations for our core campaigns

BHA Summit media partners
“As an industry we must continually strive for improvement and real investment - not just in training - which is essential to maintain and increase quality. We must push our councils and Government to invest in the infrastructure necessary to help our hospitality businesses flourish. We compete on a world stage.” Empire Hotel

“We have to work together to get things done in our industry; and the BHA is helping us achieve that. We’ve seen meaningful reform on visas this year and of course we want to see more - on VAT and recognition of the importance of our sector in general. We can only achieve that through collective action and coming together with one voice.”

Stephen McCall, Chief Operating Officer UK&I and Head of Europe Operations Performance and Support, InterContinental Hotels Group
Nestlé
Nestlé Professional is proud to support the hospitality and food service industry through the BHA. We believe it is particularly important in the areas of skills development and youth employment to safeguard the future of our industry.

Utilitywise
Over 17,000 businesses of all sizes rely on Utilitywise for their energy management needs, whether at a single site or across the UK. We have access to prices from major gas and electricity suppliers and can remove the hassle of dealing with your energy account. Utilitywise is proud to partner with the British Hospitality Association, providing its members with complete energy services packages that deliver real results.

BlueSky
BlueSky’s partnership with the BHA is now approaching its 3rd year and a large number of members are benefitting from the variety of products and systems BlueSky operate to ensure quality employers meet their legislative requirements.

Global Payments
Global Payments is pleased to continue its strong relationship with the BHA. We have preferential rates for BHA members and we will work closely to ensure that the card processing needs of the members in this competitive and fast moving sector are met with innovative solutions.

Powerful Allies
Powerful Allies is delighted and proud to have been appointed this year by the BHA as their Premium Member energy partner. Over 50 larger BHA members have already seen the benefit of our unique wholesale buying panel, which was set up to negotiate energy contracts for very large energy users in the UK, Europe and the USA. Placing over £4 billion of energy contracts per annum, the Powerful Allies wholesale panel delivers cost savings for some of the finest hotel groups in the UK, in addition to private and commercial estates, large food producers, and most recently Blenheim Palace. The BHA is determined to increase the profits of its members, and Powerful Allies’ energy contracts will help the BHA to deliver this promise.

SWR
SWR offers bespoke and innovative solutions for the BHA and wider hospitality industry to reduce costs, maximise recycling and minimise waste creation. With the cost of waste increasing every year and particular focus on food and packaging waste within the hospitality industry, waste is rising up the agenda for the industry. SWR supports the goals of WRAP’s Hospitality and Food Service Agreement (HaFSA) and this year launched FoodSmart, a pioneering service designed to reduce food waste.

Caterer.com
Caterer.com are proud to be long standing partners of the BHA. As the largest hospitality job board in the UK, Caterer.com is passionate about this vibrant and exciting industry, the employers and employees within it and the fantastic career opportunities it offers. The BHA has absolute focus in promoting, engaging and supporting the industry and those that work within it and this dovetails absolutely with the ethos of Caterer.com.

HTK
We’re delighted to be a member of the British Hospitality Association. Our HTK Horizon software is being used by a growing number of UK hotels to deliver more effective digital marketing. So for us, the BHA is a great opportunity to stay involved and at the forefront of all that’s happening in hospitality.

American Express
American Express is a global services company, providing customers with access to products, insights and experiences that enrich lives and build business success. We have a long standing commitment to the hospitality sector we are pleased to support the British Hospitality and Tourism Summit 2014.

Terence Sachee,
MD Colourbond
It is our privilege to be a partner of the British Hospitality Association, and this will give us greater exposure to all BHA members who will benefit from our print services, and make considerable savings. We also now have introduced a Web to Print system, which enables all customers to order a range of print products with the ability to edit items, maintain print control and track products.
Thinking nationally, acting locally for our community of members

Scotland

We continued to support the Association’s national priorities and deliver against three main aims:

• positioning the hospitality industry as an economic driver and provider of employment
• raising the profile of the sector
• supporting the implementation of the national tourism strategy.

BHA members and staff have worked closely with the Scottish Tourism Alliance on the preparation and implementation of the national strategy and have contributed as members of the STA Board and Council. We have continued to participate in a variety of industry leadership and working groups. During the year, progress was made with collective working, where there are shared views and priorities, with other industry bodies such as the Institute of Hospitality in Scotland, The Scottish Licensed Trade Association and the Scottish Beer and Pubs Association.

Scottish Government

Activity here has been wide-ranging and has included dialogue with the Scottish Government in relation to the Cut Tourism VAT campaign; visa restrictions and their impact on growing tourism from emerging markets and support for the aviation industry’s effort to curb the impacts of the high rate of Air Passenger Duty levied on UK flights. During the year, the BHA in Scotland has responded to a number of formal Scottish Government consultations concerning:

• Primary Authority Arrangements
• the creation of a new food body for Scotland to replace the Food Standards Agency in Scotland
• business rates
• proposals for the introduction of a levy on single-use carrier bags
• further options for alcohol licensing.

There was considerable activity representing industry views and communication with members related to the enactment of the demanding Waste (Scotland) Regulations which came into effect on 1 January 2014. The BHA worked closely with Zero Waste Scotland on aspects of the Regulations and contributed to work related to the UK wide WRAP Hospitality and Food Service Voluntary Agreement on waste management. The BHA also worked alongside the Catering Equipment Suppliers Association (CESA) on the preparation of an online guide to the waste regulations. During the year it became apparent that Zero Waste Scotland will widen its sphere of activity to embrace resource use which will concentrate on water and energy efficiency.

Development and Investment

We initiated discussions with Scottish Development International (SDI) in connection with its inward investment activities in respect of hotel and resort development. This resulted in a positive outcome that will see SDI consult with local hotel interests in relation to future investment plans and the sharing, where appropriate, of relevant research. In relation to investment matters in tourism and hospitality, the BHA responded to a consultation by VisitScotland on the preparation of the National Tourism Development Framework and continues to be involved in discussions on this. The Association has participated in discussions with the banking and financial sector about its perceptions of the hospitality industry and its approach to lending as the economy moves out of recession.

In common with other parts of the country, there has been a focus in Scotland on the regeneration and development of town and city centres. The BHA has contributed to this in Scotland and, in conjunction with the Scottish Licensed Trade Association, has emphasised that investment in town centres by the hospitality and licensed trades contributes to the vibrancy of town centres, to public safety and the night-time economy.

Employment

One of the first Big Hospitality Conversations took place in Edinburgh in February 2013. This placed considerable focus on the industry as an employer, especially in the run-up to 2014 when Scotland will play host to a number of major, international events including the Commonwealth Games, the Ryder Cup and the Year of Homecoming. The event generated significant media coverage and Scottish Government attention with participation by Angela Constance, the Minister for Youth Employment. Pledges were made by national and regional employers to offer apprenticeships and work placements to young people interested in careers in the industry.

In Scotland, the BHA contributed to the Association’s activity with the Department of Work and Pensions Hospitality Works programme which aims to better inform DWP and Job Centre Plus staff of the career opportunities within the industry. This work was supplemented by participation in careers fairs organised by colleges and local DWP offices.

Constitutional change

Politics in Scotland, and the attention of business leaders, has become increasingly focused on the Referendum on Scottish independence which will take place on 18 September 2014. BHA’s position has been strictly politically neutral, but has concerned identifying the issues which will have a bearing on the growth potential and international competitiveness of tourism and hospitality regardless of the outcome of the vote. These issues are little different to those which are relevant to hospitality growth and competitiveness elsewhere in the UK (regulation, VAT, APD, support for tourism agencies at national and regional level,
Thinking nationally, acting locally for our community of members  Continued

investment) and BHA in Scotland has taken every opportunity to reinforce these messages in dialogue with individual politicians, both at Westminster and at Holyrood, and in wider forums. There remain many uncertainties as the debate moves ever closer to the date of the Referendum and BHA’s role remains to:

• continue to make politicians aware of the importance of the industry
• make the case for the right conditions to support growth and competitiveness
• seek clarity on matters that are critical to continued business success, including:
  • the options for constitutional change
  • currency and related monetary and fiscal policies
  • future membership of the EU, and all that this entails
  • the likely timing of negotiations, discussions and implementation of change after 18 September, regardless of the outcome of the Referendum vote.

Wales

BHA Cymru/Wales Committee

BHA Cymru/Wales continued its programme of growth, partnership with Government and raising the status of the hospitality industry within Wales’ political and business communities under the second year Chairmanship of Andrew Evans and his successor Elyse Waddy and with the valuable support of Working Group members and the Wales Committee.

Policy Advocate David Chapman led the political initiative, assisting Welsh Tourism Alliance with its work in setting up a Cross Party Group for Tourism in the National Assembly for Wales and further establishing the very successful Wales MP’s All Party Group for Tourism in Westminster.

The team attended key meetings with Ministers and other Assembly members to further hospitality issues across Wales. David Chapman, the Chairs and the Working Group members worked tirelessly at local level, holding key positions as Chair, Board Members, Secretariat or Members of the following: the Wales Employer Panel, Wales Enterprise Boards, the Wales All Party Group of MPs, Westminster, South West Wales Economic Forum, Llandudno Hospitality Executive Board, Swansea Bay City Regions, South West Wales Tourism Partnership, the Tourism Cross Party Group of the National Assembly for Wales, Saundersfoot Chamber for Tourism, Pembrokeshire Business Initiative, Llandrillo College Hospitality Focus Group, Conwy Destination Management Steering Group, North Wales Tourism Ltd, Welsh Government Sustainability Forum and the BHA UK Board.

All activists sought to build on the very well received Oxford Economics report for Hospitality in Wales of 2011- and its follow up interim document - by emphasising to influencers the essential economic role that hospitality plays within Wales in providing at least one in twelve jobs and in key tourism hotspots as many as one in six of those in employment.


Work began to help develop the Skills agenda specific to the on job requirements of the hospitality industry and close relations remain with sector skills council People 1st and Springboard in Wales. A successful Big Conversation event was held in Cardiff in April 2013 which led to placements and pledges across Wales and formed the foundations for discussion with Deputy Skills Minister Jeff Cuthbert AM, and his post-reshuffle successor, Ken Skates AM, on setting up a new, specific BHA Shared Apprenticeship scheme. Talks continue with the aim of providing new opportunities for young people in Wales to rise through the Hospitality ranks and address skills shortages within the prestigious end of the hotel market.

BHA Cymru/Wales led the way with one of BHA’s UK policy platforms namely to work with Government and third party agencies to meet the industry’s sustainability agenda, by advocating and delivering the first capital grant supported Food Waste programme in the UK in association with WRAP Cymru.

Nearly £1m a year has been provided by the Welsh Government’s Environment Minister to fund a ground breaking project to provide innovative financing to enable hotels in Wales to save on food waste and to lead the way within the local community on the issue.

David Chapman continues to be Chair of the Cultural Tourism Partnership and in eight years has seen the role of industry mesh with Government across Wales to work to help extend the stay and the spend of visitors to the incredible range of attractions that exist in all parts of Wales. He is now also Chair of WRAP Cymru’s Welsh Food Service and Hospitality Advisory Group and further developments to push ahead this important environmental matter with a strong industry focus are planned for 2014.

In the coming year, Wales will seek EU Structural Funding and BHA Cymru/Wales will be working closely with Visit Wales and with Welsh Government to identify and secure any possible European Structural Funding opportunities available for development of the hospitality sector in the following six years.
The hospitality industry in Northern Ireland saw signs of recovery in 2013 but remains far from buoyant. Financial pressures, poor consumer confidence and increasing costs are continuing to stagnate growth. The climate has improved but the journey back to expansion and profitability remains a difficult one.

In 2013 the Northern Ireland Hotels Federation (NIHF) published a major report Tourism 2020: Investing in our future. The document highlights barriers to growth for the sector with research supported by Oxford Economics and ASM Belfast. Its findings fall under five headings: Tourism, Targets, Tax, Trading and Training. (known as the 5 T’s). Tourism and Targets refer to the lack of an over arching tourism strategy and future study for the industry in Northern Ireland. Trading stresses the need for a rebalancing of the customer base and Training focuses on the need for a single training agency to improve standards. The Tax element of the report centres on the need to reduce VAT. Northern Ireland is in a unique position within the UK economy as it shares a land border with the Republic of Ireland, which adopts a lower VAT rate for hotel accommodation and out of home meals. The issue is further exacerbated by the international promotion of Ireland as a single island tourist destination in all markets. The NIHF will continue to work closely with the Cut Tourism VAT campaign to raise the issue with local and national politicians. Tourism 2020 research suggests that a reduction in VAT could increase jobs in the Northern Ireland hotel sector by 40% by 2020 and that the cost of not implementing a reduction could reach £128m.

Derry Londonderry had a successful year as the first UK City of Culture with considerable media coverage and a strong year of trading. The G8 summit convened in Fermanagh in June of 2013 attracting international coverage and its dramatic Lakeland backdrop was a superb advertisement for the rural tourism offering. The World Police and Fire Games, which were held in Belfast in the summer of 2013, brought many visitors from overseas. The event was noted as the friendliest games in history.

Events are a vital part of this region’s success. In 2014, Northern Ireland will stage the Giro D’Italia start and the industry strongly advocates an increased events calendar with support to attract international events on a more regular basis. An expanded events calendar needs to be underpinned by a favourable business environment with good access and strong promotion.
Consultations

**England**

**Regulation**
- Small Business Appeals Champions
- Pricing Practices Guide
- Draft Consumer Rights Bill
- Primary Authority Arrangements
- Primary Authority Statutory Guidance
- Non economic regulators: Duty of Growth
- Revision of Package Travel Directive
- Balance of Competences: various consultations on EU powers
- Waste Prevention Programme for England

**Food and hygiene**
- Official Controls on Food, etc
- Elliott Review of food supply
- Single Use Plastic Carrier Bags
- Public procurement of pigmeat

**Employment and migration**
- Tackling Illegal Immigration
- Review of Migration Employment
- Immigration and visas: fees and charging
- National Minimum Wage (for Low Pay Commission)
- Zero Hours Employment Contracts
- Revisions to TUPE

**Licensing**
- Alcohol Fees
- World Cup Licensing Hours
- Further options for alcohol licensing
- Mandatory Conditions
- Proposed Abolition of Personal Licences
- A number of responses to licensing authorities on Late Night Levy and Early Morning Restriction Order proposals

**Tourism**
- Hotel Online Booking (two Office of Fair Trading consultations)

**Scotland**

**Regulation**
- Single Use Carrier Bags (Scotland)
- New Food Body for Scotland

**Business rates**
- Supporting Business, Promoting Growth (Business Rates)

**Alcohol licensing**
- Proposed voluntary introduction of 125ml measure of wine by the glass
- Future Options for Alcohol Licensing

**Tourism**
- Evidence to Rural Commission on rural tourism
- National Tourism Development Plan

**Public procurement**
- Procurement Reform Bill (prepared by John Dyson)
- Leading Parliamentary Debates

**Briefing papers**
- Submitted to MSPs in advance of Parliamentary Debates on:
  - Employment
  - Air Passenger Duty
  - Business Tourism

**Northern Ireland**

- Single Use Carrier Bags
- Food Hygiene Rating Scheme Compulsory Display

**Wales**

- Food Hygiene Rating Scheme regulations
- Further options for alcohol licensing
- Alcohol Fees
- Welsh Government Tourism Strategy Action Plan
- Enhanced Tourism Regional Representation
“When the industry fails to speak with a single voice it gives Government the opportunity it needs to ignore us.” Merlin Entertainment

“We applaud the BHA’s continued efforts in helping shape the future of the hospitality industry. Government and industry working together is essential to increasing our global competitiveness in areas such as visa reform, infrastructure development and investment in young people, to ensure the UK remains best in class. The BHA’s initiatives, which are closely aligned to our own business priorities in this area, are key to protecting and promoting our industry’s best interests.” Simon Vincent, Hilton Worldwide
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