



SPOTLIGHT ON

FOOD SERVICE MANAGEMENT

MARKET REPORT
NOVEMBER 2015

The British Hospitality Association



The British Hospitality Association is the forum for leading businesses in the UK hospitality and tourism industry. We serve and represent over 40,000 private sector establishments. Working together with industry and government, we aim to deliver three goals:

- Competitive advantage for our country
- Sustainable growth for our industry
- Valuable new jobs for our people

This report is one of our regular publications tracking the performance and key trends shaping the future of the UK Food Service Management (FSM) sector.

The evidence used to track the developments set out in this report is based on the findings of a September 2015 Oxford Economics study, commissioned by the British Hospitality Association (BHA), and an annual BHA survey of the leading UK Food Service Management companies.

The FSM sector has been defined using the national 2007 Standard Industrial Classification.

Definitions of the 2007 Standard Industrial Classification

Food service activities

This class includes industrial catering, i.e. the provision of food services based on contractual arrangements with the customer, for a specific period of time. Also included is the operation of food concessions at sports and similar facilities. The food is usually prepared in a central unit.

This class includes:

- activities of food service contractors (e.g. for transportation companies)
- operation of food concessions at sports and similar facilities
- operation of canteens or cafeterias (e.g. for factories, offices, hospitals or schools) on a concession basis

Event catering activities

This class includes the provision of food services based on contractual arrangements with the customer, at the location specified by the customer, for a specific event.

While we have made every attempt to ensure the accuracy and reliability of the information contained in this document, we are not responsible for any errors or omissions or for the results obtained from the use of this information. Any reliance placed on the content is therefore at the reader's own risk.

Printed copies of this report can be ordered by contacting: policy@bha.org.uk

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Introduction

In 1972, senior executives of the UK's leading Food Service Management (FSM) companies formed a group under the auspices of the British Hospitality Association. Over the past 43 years, the Food Service Management Forum (FSMF) has continued to guide the BHA's advocacy of the contract catering sector and to inform the association's dialogue with government, media and other influencers.

The Food Service Management Survey was created by the FSMF to track, analyse and report on the performance of the sector. Survey results have equipped the association with an evidence-based approach to its strategic advisory work and communications. Thanks to our year on year tracker, the survey also provides valuable insights on current and future trends helping to shape the FSM sector.

We are delighted to present the findings of the 2015 FSM survey – our 24th FSM sector-specific report. Results affirm the sector's continued success – as employers, and in terms of its commercial, environmental and community-focused activities.

This report also includes the latest findings from Oxford Economics' research, commissioned by the BHA earlier this year. According to its findings, the FSM sector's annual turnover has grown each year since 1998 and has now reached £10.8bn. Similarly, the sector's contribution to employment has increased year on year, topping 268,000 in 2014. Trends and optimism point to continued growth in the short and medium term. It is also very encouraging to report the sector's progress on tackling waste, and promoting health and nutrition.

The BHA and the FSMF look forward to working with executives of the sector to further the on-going success of Food Service Management in years to come.

Ufi Ibrahim, Chief Executive,
British Hospitality Association

Phil Hooper, Chairman,
BHA Food Service Management Forum

Members of the Food Service Management Forum:

Phil Hooper Chairman	Sodexo
Tim West Vice-Chairman	Lexington Catering
Wendy Bartlett MBE	bartlett mitchell
John Bennett	Westbury Street Holdings
Frank Bothwell	Thomas Franks
Jim Cartwright	Dine Contract Catering
Paul Cowie	OCS International
Ian Crabtree	Accent Catering Services
Simon Cule	Thomas Franks
Julia Edmonds	Lexington Catering
Alison Frith	Artizian Catering
Caroline Fry	CH&Co
Joan Gilbert	Pride Catering Partnership
Mark Greene	London Bridge and Lister Hospitals
Geoffrey Harrison	Harrison Catering Services
Andrew Merrett	CH&Co
Ian Mitchell	bartlett mitchell
Carl Morris	Elior UK
Andrew Norrie	Olive Catering Services
Sue Parfett	Brookwood Partnership
Phil Roker	Vacherin
Richard Tapner-Evans	House of Commons
Doug Tetley	Delaware North
Ruston Toms	Blue Apple Contract Catering
Kevin Watson	Amadeus
Stephen Williams	Celtic Catering Partnership

Contents

The British Hospitality Association	2
Introduction	3
A vibrant and growing sector	5 - 10
Recruiting and retaining talent	10 - 12
Leading in responsible hospitality	13 - 17
BHA Members	18 - 22
BHA Partners	23

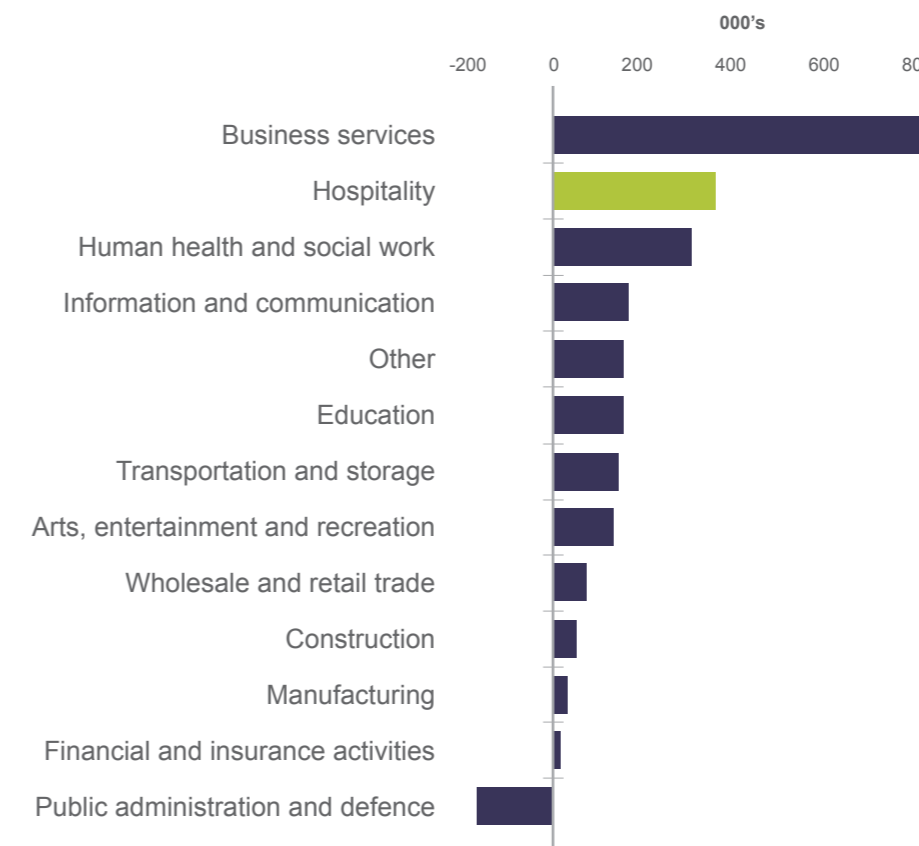


A vibrant and growing sector

The independent study, completed in 2015 by Oxford Economics for the British Hospitality Association, confirms that hospitality is the UK's fourth largest industry. In 2014, it accounted directly for 2.92 million jobs. Adding indirect employment of 775,000 (where hospitality firms purchase goods and services from UK suppliers) and induced employment of 941,000 (where hospitality and supply chain employees buy consumer goods and services). The total economic impact of hospitality is over 4.6 million jobs and gross value added of £143 billion, some 10% of UK gross domestic product. Details on the development over the past decade of direct employment in the food service management sector are on page 10.



Contribution to new job creation (2010-2014)

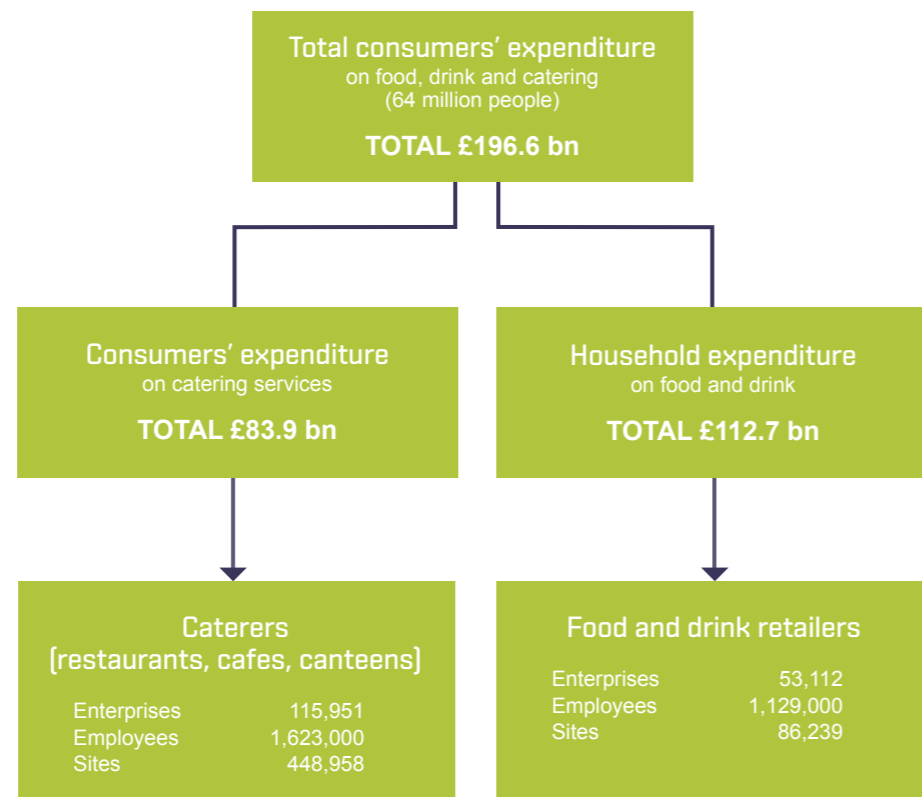


The hospitality industry has been at the forefront of the economic recovery over the past five years, creating jobs in every region of the country for people of all ages and skill levels.

Positive growth for FSM

Since 2012, the Food Service Management (FSM) sector has recorded positive year on year growth. The sector continues to benefit from strong sales across its entire portfolio and has benefitted from the latest dining out trends, ranging from street food to full service concepts. According to national statistics issued by DEFRA at the end of 2014, meals consumed out of the home in the UK accounted for £83.9bn, 42.7% of total consumer expenditure on food, drink and catering (£196.6bn).

Food Chain

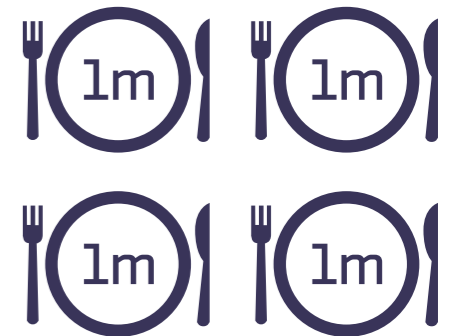
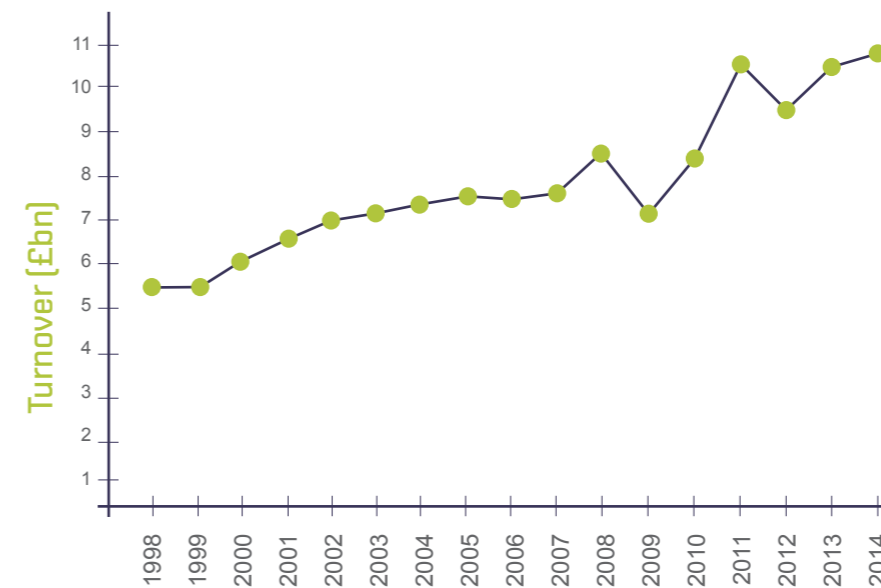


Source; DEFRA; Office of National Statistics



FSM turnover has reached £10.8 billion and 86% of respondents to the national FSM survey reports that net revenues increased between 2013 and 2014.

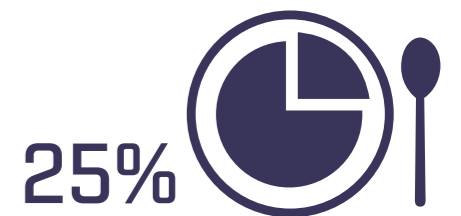
Respondents were buoyant in their expectations for continued growth over the next three years.



FSM companies
serve over
4,000,000
customers each day

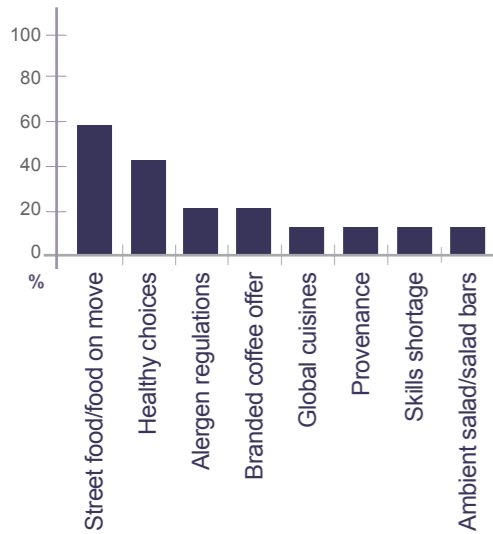
Expansion in event catering

In recent years one of the key markets for growth in the FSM sector was event catering. This is a service now offered by one in four of respondents to the survey.



25%
of companies market
and sell services as
an event caterer

Top trends in last three years



The FSM sector operates in a dynamic environment and is responsive to evolving market trends. In the last three years the top trends shaping the FSM sector range from the increasing popularity of street food to the impact of allergen regulations. Respondents to the national survey highlighted the influence of new customer demands, increased regulation, in particular the 2014 Food Information Regulation, and the UK skills shortage among the highest-ranking impacts on the UK FSM sector.

What's next? Predictions for future trends in the hospitality industry

According to industry experts, current market trends will continue to evolve in the short and medium term. Indicators point to a continued drive for healthy dining options, a desire for honesty in food - from authenticity and local sourcing through to transparency and information at point of sale – and an increasing diversity of food types and cuisines. The Street Food trend is expected to play a big part and hand-held, quick food is expected to take a greater share of the total market. These trends are promoting growth in Deli and Café style services.

The current focus on corporate responsibility and sustainability is expected to increase. Whilst not an issue for all, the requirement for integrated facilities management is also predicted to grow.

Respondents also drew attention to high levels of uncertainty in relation to longer-term trends. In particular, the buying behaviour and dining preferences of the Millennials generation. Set to be the greatest proportion of the workforce over the next ten years, Millennials are expected to have a significant impact on the provision of FSM products and services. The impact of technology is also expected to impact all aspects of food service - from communications with customers, through to ordering and transactions, including cashless payments.

IFM RETAIL BRANDS
All day grazing
DELI/CAFE STYLE
Healthy
CASHLESS
Millennials
HONESTY
SERVICE
STREET FOOD
Sustainability
PROVENANCE
Waste
INNOVATIVE VENDING
GLOBAL CUISINES
PUBLIC SECTOR VFM
TECHNOLOGY
CORPORATE RESPONSIBILITY

Brands

Marketing experts point to the growing importance of brands in customer engagement and differentiators between competitors, not only in terms of the service offer, but also as a representation of what the business stands for. The expectation is that the engagement of increasingly discerning customers will rely on the ability of brands to leverage emotional and societal values.

Around 80% of the FSM companies surveyed stated that they now offered food packaged under their own brands and only slightly fewer 70% used franchised brands such as Starbucks or Costa as part of their service offer to clients.

Of the companies surveyed:



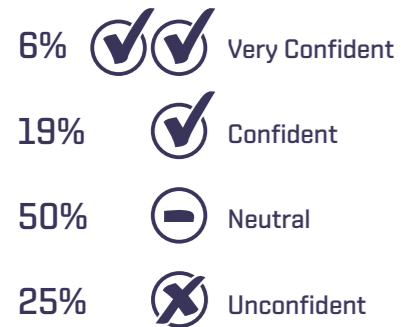
Optimism for business growth

In this year's survey, respondents pointed to an expectation for revenues increase year on year for the next few years. Over a quarter anticipated a significant increase, reflecting the healthy state of the market.

Expected business growth in next 3 years:

Growth	% of Companies
0-15%	40%
16-30%	33%
Over 31%	27%

How confident are you that the current government will support the hospitality industry?



Strong representation with government continues to be important

The survey of FSM companies was conducted soon after the election of a new government in May 2015. Respondents were asked if they expected the incoming government to support the hospitality industry. Just 25% responded positively. Just as many were convinced that this would not be the case pointing to the need for continued advocacy and lobbying.

Recruiting and retaining talent

Operating in a growing and dynamic marketplace, the sector has a constant need to attract new talent. FSM companies have proven success in offering excellent career opportunities and progression - regardless of the skills levels of new entrants. Nevertheless, the sector still faces a skills shortage.

FSM employee numbers over past 10 years

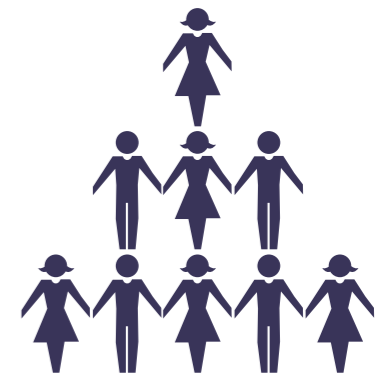


The sector employs

 **268,000**

Inspiring the Next Generation - The Big Hospitality Conversation

The Big Hospitality Conversation is a unique platform bringing industry leaders together with young jobseekers to discuss prospects within the hospitality industry, thereby raising the profile of career opportunities within the industry. The Big Hospitality Conversation campaign also encourages hospitality businesses across the UK to offer more quality work experience, more apprenticeships, and to employ more local young people. To date, **2,900** hospitality businesses have engaged in Big Hospitality Conversations across every region of the UK, generating over **47,000** new opportunities for young jobseekers.



New Jobs

Companies expect to make between **5,000 - 10,000** new hires in the next year

Annual staff turnover

While staff turnover rates were high for nearly half of the companies responding to the survey, results also show that nearly a quarter of companies have staff turnover rates below 10% lower than the UK average for all industries.

What is your annual staff turnover?

Turnover	% of respondents
0-10%	23%
11-20%	31%
21% +	46%



Staff benefits

The main benefits offered to staff are shown here. Other benefits mentioned by organisations included season ticket loans, employee support helplines and eye care vouchers.

What benefits do you provide to your management and employees? Of those responding:



Women in leadership

44% of companies are led by women

62% of companies have 25% or more women on their boards

The average % of women on boards is **31%**

Lord Davie's 2011 report *Women on Boards* recommended steps to increase the number of women serving on boards in the UK. Lord Davies also set a national target for FTSE 100 companies to ensure that 25% of board members were women by 2015.

The food service sector prides itself on a good gender balance in the boardroom with 62% of member companies stating that at least 25% of their board members were women and a further 44% of companies were led by women.

Leading in responsible hospitality

The Responsibility Deal

Survey results show that eight out of ten FSM companies have already signed up to one of the Government's Responsibility Deals.

The Public Health Responsibility Deal for England, led by the Coalition Government between 2010 and 2015, sought to tap into the potential for businesses and other influential organisations to make a significant contribution to improving public health.

Hospitality and tourism businesses signed up to the Responsibility Deal, committing to take action to improve public health as employers, as well as through their commercial and community actions. The commitments resulted in significant investments on the part of companies who had signed up. These investments were primarily made to alter the way companies approached, monitored and reported on the results of their actions. The BHA calls on the Department of Health to revive the Responsibility Deal, building on the commitment of hospitality and tourism businesses. The BHA is committed to working with the Department of Health to further the collaborative and voluntary approach to improving Public Health in out of home dining.



Over **80%** of food and service management companies have signed up to the Responsibility Deal.



Main areas of focus

The survey confirms that FSM businesses remain committed to their corporate and social responsibilities (CSR), and continue to prioritise all the key areas of importance for CSR within the UK hospitality sector.

94% of businesses said that sustainability was important or critical to their business.

38% critical, 56% important, 6% neutral, 0% not important or not important at all.



Main focus areas for FSM companies ranked in order of importance

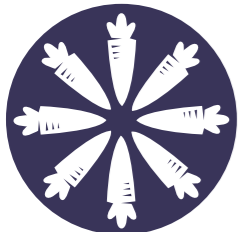
	Score*
Nutrition/healthy eating	99
Animal welfare/sustainable fishing	99
Local sourcing	93
Waste reduction	89
Care in the supply chain	77
Community initiatives/employment	76
Ethical/fair trade/organic	71
Energy reduction	42
Water efficiency	36

*Score is weighted calculation where highest ranked items given greatest value.

The sector has been proactively supporting government initiatives and voluntarily leading on sustainable sourcing, health and wellbeing programmes, as well as caring for the environment around them.

Health and nutrition

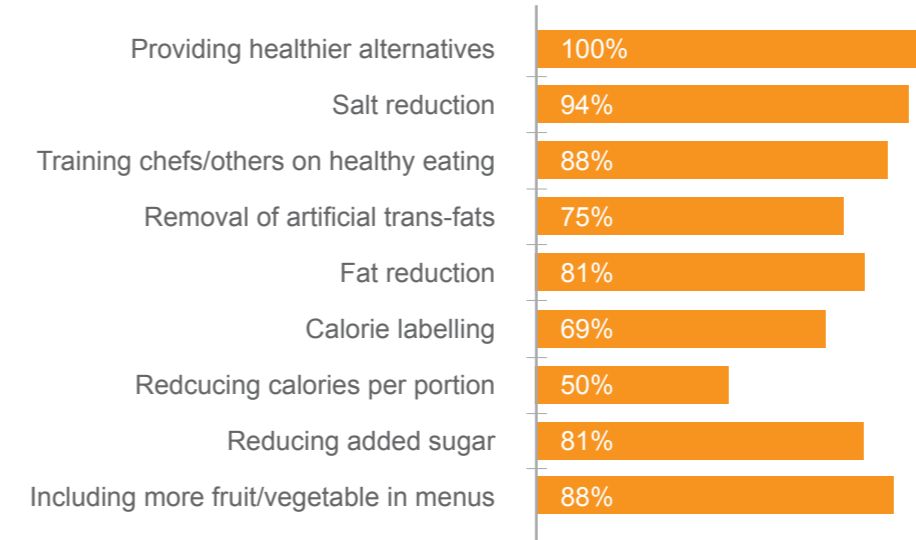
100% of FSM companies are providing healthier alternatives and lower calories options.



Companies have continued voluntarily to provide significant investment in this area, monitoring and reporting to reduce calories, cut sugar and salt in products, and provide healthy menu options.

Manufacturers, distributors and caterers have long been making great contributions to improve the nutrition of products or provide healthier alternative choices, and these results indicate no slowdown in progress.

What are you doing in relation to health and nutrition?



BHA Nutrition Group

The BHA Nutrition Group was established in 2014 to bring together nutrition specialists from FSM and other hospitality businesses in the UK. The Group informs the association's public health discussions with government, and helps the BHA promote best practice across the industry. The Group also facilitates a cross reference of know-how between the larger and smaller businesses operating in UK hospitality. BHA Nutrition Group Members are:

- | | |
|--------------------------------|------------------------------|
| CH&Co | Merlin Entertainments |
| Nestlé Professional | Nandos |
| Kensington Roof Gardens | Mitchells and Butlers |
| Neds Noodle Bar | WSH |
| Amadeus | Sodexo |
| Whitbread | |
| Coca Cola | |
| Unilever | |

Addressing Waste

FSM companies ranked waste as their 4th highest priority in 2015, reflecting the commitment of the industry to improve its environmental performance.

Comprehensive food waste action plan are in place in **69%** of responding companies

Backing the government's aim to reduce waste from food and associated packaging on a voluntary basis, the hospitality industry and its supply chain have already made significant progress in improving environmental performance with more than two thirds having a full food waste action plan.

To close the gap in action on food waste the BHA and its Food Service Management Forum are now working with partners SWR and Winnow Solutions on a campaign called 'Waste Not Want Not' which will provide businesses with guidance on finding innovative ways to reduce their waste further.

Sustainable sourcing



94% of FSMs are using locally sourced food

81% are using ethical products (such as organic/ fair trade/ free range) in meals.

In the past twelve months, there has been an increase in the number of FSM companies providing locally sourced food, and products containing labels such as free range, fair trade and organic.

Palm Oil commitment

The UK Government committed to achieving 100% sourcing of sustainable palm oil by the end of 2015. Currently just under half of those organisations surveyed were achieving this. This figure is expected to increase following a canvas of the industry which has shown that most businesses are now taking steps to transition toward sustainable palm oil products, or interested in doing so in the near future.

In September 2015, to further aid FSM companies in reaching their voluntary targets, the BHA produced a practical step-by-step guide to Sustainable Palm Oil.

44%

using sustainably sourced palm oil ingredients or making progress towards procuring these.



List of BHA Members

1 Lombard Street (Jessen & Co), London
2be2serve, Haslemere
60 Hope Street Restaurant, Liverpool
67 Pall Mall, London
A.B.M.S Education Group, Baar
AB Hotels, St Albans
Abbotsholme School, Staffordshire
Aberdeen City and Shire Hotels Association, Aberdeen
ABM Catering, Warwick
Accent Catering Services, Staines
Accor Hotels, London
Ace Hotel, London
Act Clean, London
Admiral Group, London
Albertine, London
Alexandra Hotel & Restaurant, Lyme Regis
All Stay, London
Alveston House Hotel, Bristol
Amadeus, Birmingham
Ambassador Hotel, Llandudno
Amcomm Ltd, Balaeres
American Express, London
Andaz London (Hyatt), London
Angel Human Resources, London
Ann's Pantry, Anglesey
Apex Hotels, Edinburgh
Army & Navy Club, London
Arora Hotels, West Drayton
Artizian Catering, Wargrave
Arundell Arms Hotel, Lifton
Ascot House Hotel, Harrogate
Avoca House Hotel, London
Avvio, Limerick
Aynsome Manor Hotel, Grange-over-Sands
Azell Hospitality Management, London
Azzurri Group, London
Babylon, London
Baillifscourt Hotel, Nr Arundel
Baldwins Omega, Sheffield
Balmoral Hotel (Rocco Forte), Edinburgh
Bamboo Revenue, London
Bar Boulud London, London
Barclays Bank Plc, London
Barnsley College, Barnsley
Barons Pub Company, Woking
Bartlett Mitchell, Egham
Baxterstorey (Holroyd Howe), Reading
Beaufort House, London
Bedford Lodge Hotel, Newmarket

Beechwood Hotel, North Walsham
Bel Canto Restaurant, London
Belle House, Pershore
Belmont House Hotel, Leicester
Berry Head Hotel, Brixham
Bespoke Hotels, London
Best Western Hotels, York
Bicester Village, Bicester
Bingham Hotel, Richmond-on-Thames
Bird of Smithfield, London
Bleeding Heart, London
Blue Apple Contract Catering, Wokingham
Blue Arrow, Luton
BlueSky Pension Scheme, Sidcup
Boath House Hotel, Naim
Boodle's, London
Boscastle Farm Shop and Cafe, Cornwall
Boulestin, London
Bourne Leisure Limited, Hemel Hemstead
Bournemouth University, Poole
Bovey Castle, Dartmoor National Park
Boyes Turner LLP, Reading
BP & SEM Consultants, Langley
Brend Hotels, Barnstaple
Bridge of Orchy Hotel, Argyll
Bridgestreet, London
Brigade Bar and Bistro, London
Brighton & Hove Hotels Association, Brighton
Brooks's, London
Brookwood Partnership, Walton On Thames
Browns Cafe, Cleethorpes
Brown's Hotel (Rocco Forte), London
Brownsword Hotels, Bath
Bryn Bras Castle, Caernarfon
Bunzl Lockhart Catering, Reading
Burger King, Slough
Busaba Eathai, London
Butley (Orford) Oysterage, Woodbridge
Caer Beris Manor Hotel, Builth Wells
Café 21, Newcastle upon Tyne
Café Football Limited, London
Cafe Pacifico, London
Café Royal Hotel, London
Café Spice Namaste, London
Cafecino, Barnstaple
Caffe Bolero, Worcester
Calcot Manor Hotel, Tetbury
Calf's Head, Clitheroe
Cambus O'May Hotel, Ballater
Cantley House Hotel, Wokingham

Caparo Hotels, Torquay
Capital Hotel, London
Caraffini, London
Careys Manor & Senspa, New Forest
Carlton Club, London
Carlton Hotel, Torquay
Carlton Towers, Goole
Carluccios, London
Carnegie Club at Skibo Castle, Dornoch
Caspian, Workington
Castle Hotel, Conwy
Castros, Leek
Celtic Catering Partnership, Pontyclun
CH&Co, Reading
Champany Inn, Linlithgow
Charlton Kings Hotel & Restaurant, Cheltenham
Chatsworth Hotel, Worthing
Cherwell Boathouse, Oxford
Chewton Glen Hotel, New Forest
Chez Bruce, London
Chez Lindsay, Richmond
Chris & Cherry Limited, Portsmouth
Christie Group, London
Ciel Hotels, Penrith
City Nites, Birmingham
City of Bristol College, Bristol
City of London Club, London
City University Club, London
Clarence, Stokenchurch
Clarke's Restaurant, London
Classic British Hotels, Woking
Classic Lodges, Chorley
Clevedon Hall, Clevedon
Cloud Hotel, Brockenhurst
Club Gascon, London
Club Insure, Leeds
Co Save, Horsham
Coca-Cola Enterprises, Uxbridge
Colchester Institute, Colchester
Coleg Llandrillo, Colwyn Bay
Colliers International, London
Colour Bond The Printers, London
Colwall Park Hotel, Malvern
Combe House Hotel, Exeter
Conde Nast Johansens, London
Congham Hall, Kings Lynn
Considerate Hoteliers Association, London
Corinthia Hotel London, London
Corney & Barrow Wine Bars, London
Côte Restaurants, London

Courthouse Hotel London, London
Crescent Hotel, Harrow
Crescent Hotels, Margate
Crieff Hydro Hotel, Crieff
Crinan Hotel (Argyll), Lochgilthead
Crowne Plaza London-Ealing, London
Crystal Hotels, London
D&D London, London
Danesfield House Hotel and Spa, Marlow-On-Thames
Dart Marina Hotel, Dartmouth
Davies Tanner PR, Tunbridge Wells
Deer Park Country House Hotel, Honiton
Dickens Wine Bar, Powys
Dine Contract Catering, Warrington
Discover Financial Services, Riverwoods
Dodd & Co, Carlisle
Dolphin Hotel, London
Domino's Pizza Group, Milton Keynes
Donnington Valley Hotel & Spa, Newbury
Dormy House Hotel, Broadway
Dorsett Shepherds Bush, London
Doubletree London Ealing, London
Doubletree London Hyde Park, London
Douglas Grant Associates, Teddington
Drake & Morgan, London
Draycott Hotel, London
Drayton Manor Theme Park, Nr Tamworth
Driftwood Hotel, Truro
Ducks at Kilspindie, Aberlady
Dukes Hotel, London
Dunoon Hotel, Llandudno
Durrants Hotel, London
East Lodge Country House & Restaurant, Matlock
Eastbourne Hospitality Association, Eastbourne
Eco, London
Ecolab, Northwich
Edelweiss Piano, Cambridge
Edinburgh Hotels Association, Edinburgh
Edinburgh International Conference Centre, Edinburgh
Ed's Easy Diner, London
Elior UK, London
Elite Hotels, Forest Row
Elliott Marketing & PR, Linford Wood
Emile's Restaurant, London
Empire Hotel, Llandudno
English Lakes Hotels, Windermere
Esseborne Manor Hotel, Andover
Estiatorio Milos, London

Euro Hostels, Glasgow
Europe Japan Centre, London
Exclusive Hotels, Bagshot
Exmoor White Horse Inn, West Somerset
Experience Nottinghamshire, Nottingham
Eynsham Hall Hotel, Witney
F & M Solutions Limited, Coggeshall
Falmouth & District Hotels Association, Falmouth
Farlam Hall Hotel, Brampton
FBM London UK, London
Fence Gate, Burnley
Feversham Arms Hotel & Verbena Spa, Helmsley
First Floor Cafe, Windermere
First4skills, Liverpool
Four Pillars Group, Witney
Four Seasons, London
Fourcroft Hotel, Tenby
Friends Restaurant, Harrow
Funding Circle, London
Galvin Restaurants, London
Gather & Gather, Bristol
Georgian House Hotel, London
Gibbon Bridge Hotel, Preston
Gilpin Lodge Country House Hotel, Windermere
Giraffe Group, London
Gleneagles Hotel, Perthshire
Glengarry Castle Hotel, Invergarry
Glewstone Court Hotel, Ross-on-Wye
gh Hotels, London
Gliffaes Country House Hotel, Crickhowell
Glion Institute of Higher Education, London
Glovers Solicitors LLP, London
Go Native, London
Grand Harbour Hotel, Southampton
Gravetye Manor Hotel, West Hoathly
Great Nepalese Restaurant, London
Greenwoods Solicitors LLP, Peterborough
Grosvenor Hotel, Ilfracombe
Grosvenor Pulford Hotel & Spa, Chester
GSS Catering Management Services, Harpenden
Guido's Restaurant, Amersham-on-the-Hill
H10 Hotels (Waterloo) Ltd, London
Halkin Hotel (LHW), London
Hambleton Hall Hotel, Oakham
Hamlins, London
Hampstead Village Guesthouse, London
Hand Picked Hotels, Sevenoaks
Harbour & Jones, London

Harbourmaster Hotel, Aberaeron
Hard Rock International, London
Harringtons, Chatham
Harrison Catering Services, Thame
Hart's Nottingham, Nottingham
Harvey Nichols Restaurants, London
Haysmacintyre, London
Headlam Hall, Darlington
Headland Hotel, Newquay
Health Monster, London
Hebridean Princess, Skipton
Heidrick & Struggles, London
Heritage Leisure Group, Chelmsford
Hilton Hotels Corporation, Watford
Historic House Hotels, London
Historic Sussex Hotels, Midhurst
Hogan Lovells International LLP, London
Holbeck Ghyll Country House Hotel, Windermere
Holdsworth House Hotel, Halifax
Holiday Villa Hotel & Suites London, London
Hotel Felix, Cambridge
Hotel Riviera, Sidmouth
House of Commons (Catering), London
House of Lords (Catering), London
Howards House Hotel, Salisbury
HQ Theatres and Hospitality, London
HTK Limited, Ipswich
Huddersfield Central Lodge Hotel, Huddersfield
Huffkins, Burford
Hyatt Regency London, The Churchill, London
Hydro Hotel, Eastbourne
Il Forno, Liverpool
Imperial Hotel, Great Yarmouth
Indian Zing Restaurant, London
InterContinental Hotels, Denham
Interstate Europe Hotels & Resorts, Birmingham
Isle of Eriska Hotel, By Oban
Java & Jazz, Forest Row
Jersey Choice, St Helier
Jersey Hospitality Association, Jersey
Joe Allen, London
Johnsons Stalbridge Linen Services, Shaftesbury
Jones Lang Lasalle, London
Jumeirah Carlton Tower Hotel, London
K & K Hotel George, London
K West Hotel & Spa, London
Kaba, Tiverton
Kai Mayfair, London
Kelham House Country Manor Hotel, Newark

Kent Hall Hotel, London
Kimbolton Lodge, Bedford
Kinloch House, Blairgowrie
Kinloch Lodge Hotel, Sleat
Knappgarden & Soho North Restaurant, Sarna
Knockinaam Lodge, Stranraer
Knockomie Hotel, Forres
La Barbe, Reigate
La Brasserie, London
La Gaffe Hotel, London
La Porte Des Indes, London
Lake Country House & Spa, Llangammarch Wells
Lakes Hospitality Association, Windermere
Lakeside Hotel, Newby Bridge
Lamont Pridmore, Workington
Lancaster London, London
Langar Hall Hotel, Nottingham
Langley Castle Hotel, Hexham
Las Iguanas, Bristol
Lastingham Grange Hotel, York
LCA Business School London, London
Le Gavroche, London
Le Manoir aux Quat' Saisons, Oxford
Leander Club, Henley-on-Thames
Leeds Metropolitan University, Leeds
Legacy Hotels, Henley-in-Arden
L'enclume, Grange-over-Sands
Lexington Catering, London
Lino's Restaurant, Wirral
Linthwaite House Hotel, Windermere
Liverpool Hoteliers Association, Liverpool
Liverpool Restaurant Association, Liverpool
Living Ventures, Knutsford
Llandudno Hospitality Association, Llandudno
Llangoed Hall, Brecon
Loch Melfort Hotel & Restaurant, Oban
Lodge Hotels (Lincoln), Luckington
London Bridge and The Lister Hospitals, London
London Bridge Hotel, London
Losehill House Hotel & Spa, Hope
Lucknam Park Hotel, Chippenham
Luckylink, London
Lupton Fawcett Denison Till, Leeds
Made In Belfast, Belfast
Malmaison Hotels, London
Manchester Marriott V&A, Manchester
Manchester Metropolitan University, Manchester
Mandarin Oriental Hyde Park, London
Manx Hospitality Partnership, Isle of Man
Marc, London

Marche, Birmingham
Marlin Apartments, London
Marriott Hotels, London
Matricardis Bar & Restaurant, Henley-in-Arden
Maybourne Hotel Group, London
ME London, London
Meejana, Weybridge
Melia White House, London
Melita House Hotel, London
Mellington Hall, Powys
Meltons, York
Merlin Entertainments, London
Merlyn Court Hotel, London
Meson Don Felipe, London
Metropolitan London, London
Metropolitan Restaurants, London
Mews of Mayfair, London
Millennium & Copthorne Hotels, London
Milsom Hotels, Colchester
Minel Leisure, Newcastle upon Tyne
Mitchells & Butlers, Birmingham
Monk Fryston Hall Hotel, Leeds
Montcalm Hotel London, London
Moorfield Group, London
Morston Hall Hotel, Holt
Mount Charles Group, Belfast
MPM Catering, Shrewsbury
Mr Thomas's Chop House, Manchester
Mullion Cove Hotel, Helston
Mumtaz Restaurant, Bradford
MW Eat, London
Myhotel Bloomsbury & Chelsea, London
Myhotel Brighton, Brighton
Nando's Chickenland, London
Neds Noodle Bar, London
New England Hotel, London
New Lanark Hotels, Lanark
New Mayflower Chinese Restaurant, London
New World, London
Neway International, London
NH Harrington Hall Hotel, London
Nincomsop, London
North Wales Tourism, Colwyn Bay
Northcote, Blackburn
Northern Hotel, Bexhill-on-Sea
Northern Ireland Hotels Federation, Belfast
Norwich City College (Restaurant), Norwich
Noura, London
Oakwood, London
Oatlands Park Hotel, Weybridge

Ocean Hotel, Sandown
Ockenden Manor Hotel, Cuckfield
OCS International Facilities Management Services, Crawley
Old Bridge Hotel, Huntingdon
Old Hall Hotel, Buxton
Old Kings Arms Hotel, Pembroke
Old Plow Bistro, Speen
Olive Catering Services, Ratcliffe Culey
Olivetree Restaurant, Southampton
One Aldwych, London
Opulent Foods Company Limited, Hatfield
Otus & Co, London
Oxford & Cambridge Club, London
Oxford Brookes University, Oxford
Park House Hotel, Norfolk
Park Lane Mews Hotel, London
Park Plaza County Hall, London
Park Plaza Victoria London, London
Parkdean Holiday Parks, Newcastle upon Tyne
Parkwood Hotel at Marble Arch, London
Patcharee Thai Restaurant, Kingston Upon Thames
Peace And Loaf, Newcastle
Peel Hotels, London
Peking Garden Bramall, Stockport
Pembrokeshire Tourism, Pembrokeshire
Penkerris, St Agnes
Penmaenuchaf Hall Hotel, Dolgellau
Penningtons Manches LLP, London
Penventon Park Hotel, Redruth
Pen-Y-Dyffryn County Hotel, Oswestry
Pen-Y-Gwryd Hotel, Gwynedd
Pepe Sale, Reading
Peruga, Stockport
Planted, Bath
Pontis Group, London
Porters English Restaurant, Berkhamsted
Portland Hotels, Edinburgh
Pride Catering Partnership, Guildford
Pride of Britain Hotels, Foxley
Principal Hayley Hotels, Harrogate
Progressive Training, St Albans
PSL - The Food Professionals, Leamington Spa
Pubs of Ulster, Belfast
QHotels Limited, Leeds
Queensberry Hotel, Bath
Radisson Edwardian Hotels, Hayes
Raemoir House Hotel, Banchory
Raj of India, London
Red Carnation Hotels, London

Redbrick House, Mansfield
Redcoats Farmhouse Hotel & Restaurant, Hitchin
Redefine BDL, London
Responsible Hospitality Partnership, Thame
Restaurant Tristan, Horsham
Rhos Fynach Restaurant, Rhos on Sea
Ribble Valley Inns, Ribchester
Rigoletto Restaurant, Bicester
River Hotel, Oxford
Riverside Hotel & Leisure Club, Kendal
Roast, London
Rose & Crown, York
Rosewood London, London
Rouse Partners LLP, Beaconsfield
Rowhill Grange Hotel And Utopia Spa, Wilmington
Rowton Castle, Shropshire
Royal Air Force Club, London
Royal Automobile Club, London
Royal Corinthian Yacht Club, Burnham-on-Crouch
Royal Garden Hotel, London
Royal Oak Hotel, Betws Y Coed
Royal York & Faulkner Hotel, Sidmouth
Rudding Park Hotel, Harrogate
Rules, London
Russells of York, York
Rutland Inn Company, Clipsham
Rydges Kensington London, London
Rye & District Hotels & Caterers Association, Rye
SACO, Bristol
Sai Events UK, Glasgow
Saint & Co, Carlisle
Saville Consultancy Services, Hereford
Savills UK, Exeter
Savoy Park Hotel, Ayr
Scafell Hotel, Keswick
Scarborough Hospitality Association, Scarborough
Seymour Hotels of Jersey, Jersey
Shakespeare Hotel, London
Shambles Italian Restaurant, Bar and Garden, Teddington
Shampers, London
Shangri-La Hotel, London
Shearings Holiday Hotels, Torquay
Sheffield Hallam University, Sheffield
Shieldyourself, Manchester
Siam Paragon, East Molesey

Sidmouth & District Hospitality Association, Sidmouth
Sidmouth Hotels, Sidmouth
Sienna Restaurant, Dorchester
Silver Lining, Gosport
Silverterrace, Daventry
Singleton Lodge Country House Hotel, Poulton-Le-Fylde
Skegness, East Coast & Wolds Hospitality Association, Skegness
Sofra Restaurants, London
Southport Hoteliers Association, Southport
Spacily, London
Spaghetti House, London
Spart House Hotel, Accrington
Specialist Waste Recycling, London
St Bride's Hotel, Saundersfoot
St James's Hotel and Club, London
St John Bar & Restaurant, London
St Michael's Manor Hotel, St Albans
St Moritz Restaurant, London
St. John's Tavern, London
St. Patrick's International College, London
Starboard Hotels, Wembley
Starwood Hotels and Resorts, London
Staybridge Suites Newcastle, Newcastle upon Tyne
Stephenson Harwood LLP, London
Stirrups Country House Hotel, Bracknell
Studio Six 1992, London
Studley Hotel, Harrogate
Style Psychology, London
Swanage & Purbeck Hospitality Association, Swanage
Swinton Park Hotel, Ripon
Swiss Institute for Management and Hospitality, Switzerland
Synergy Health, Monmouthshire
TA Hotel Collection, Aldeburgh
Tabai, London
Tamp N Swirl, Northallerton
Tampopo, Manchester
Tenby House, Tenby
TGI Friday's, Luton
Thai Pot, London
The Academy, London
The Angel Hotel, Abergavenny
The Angel Hotel, Bury St. Edmunds
The Angel Inn, Skipton
The Automobile Association, Basingstoke
The Barrel Inn, Hope Valley

The Beaumont, London
The Beaver Hotel, London
The Beech Tree Inn, Cardiff
The Belfry, Sutton Coldfield
The Bell Inn, Horndon-on-the-Hill
The Black Swan Inn, Culgaith
The Boatside Inn, Hexham
The Bournemouth Accommodation & Hotel Association, Bournemouth
The Brickwall Hotel, Battle
The Buccleuch & Queensberry Hotel, Thornhill
The Buell Consulting Group, Medstead
The Caledonian Club, London
The Castle Hotel Neath, Neath
The Cavendish London, London
The Celtic Manor Resort, Newport
The Charles Bathurst Inn, Richmond
The Chatsworth Hotel, Eastbourne
The Chester Grosvenor, Chester
The Cottage Hotel, Kingsbridge
The Cottage In The Wood, Malvern
The Devonshire Arms Country House Hotel & Spa, Skipton
The Diplomat Hotel, London
The Dorchester, London
The Doyle Collection, Ballsbridge
The East India Club, London
The Evesham Hotel, Evesham
The Fat Duck, Bray
The Feathers Hotel, Ledbury
The French Horn, Reading
The French Table, Surbiton
The General Tarleton Inn, Knaresborough
The George Hotel, Hathersage
The George of Stamford Hotel, Stamford
The Glasshouse, Edinburgh
The Glasshouse, Kew
The Godstone Hotel, Godstone
The Goring Hotel, London
The Granby Inn, Morpeth
The Great Barr Hotel, Birmingham
The Greyhound Inn at Stockbridge, Stockbridge
The Honourable Society of Lincoln's Inn, London
The Hotel Collection, Hinckley
The House of St. Barnabas, London
The Hoxton, London
The Kensington Wine Rooms, London
The Landmark London, London
The Lanesborough, London
The Langham London, London
The Lime Tree, Manchester

The Lincoln Centre, London
The Lodge at Kingswood, Kingswood
The Lovat, Fort Augustus
The Lowry Hotel, Manchester
The Magpie Cafe, Whitby
The Mandeville Hotel, London
The Manor at Weston-On-The-Green, Bicester
The Manor House Hotel, Berwick Upon Tweed
The Nare Hotel, Truro
The National Liberal Club, London
The National Trust For Scotland, Edinburgh
The New Club, Edinburgh
The Norfolk Club, Norwich
The Northern Quarter Restaurant & Bar, Manchester
The Old Course Hotel, Golf Resort & Spa, St Andrews
The Old Vicarage Hotel, Ambleside
The Olde Ship Inn, Seahouse
The Pear Tree at Purton, Swindon
The Penn Club, London
The Pheasant, Harlington
The Pines Hotel And Restaurant, Chorley
The Pipe & Glass Inn, Beverley
The Poachers Inn, Dorchester
The Portobello Hotel, London
The Private Health Partnership, Baildon
The Rezidor Hotel Group, London
The Rising Sun, Lynmouth
The Ritz London, London
The Robert Gordon University, Aberdeen
The Savoy, London
The Shibden Mill Inn, West Yorkshire
The Sloane Club, London
The Square, London
The Stafford London, London
The Swan at Streatley, Streatley-On-Thames
The Torrion, Wester Ross
The Tourism Business, York
The Travellers Club, London
The University Women's Club, London
The Victoria Hotel, Bamburgh
The Vineyard At Stockcross, Newbury
The Waterside Inn, Bray
The Westwood Hotel, Oxford
The White Swan Inn, Pickering
The Willowbank Hotel, Largs
The Windermere, London
The Woodhouse Hotel, Largs
The Wordsworth Hotel & Spa, Grasmere
The Zetter, London

Thomas Franks, Banbury
Threadneedles, London
Three Acres Inn, Huddersfield
Three Horseshoes Inn, Leek
Three Lions, Fordingbridge
Thurlestone Hotel, Kingsbridge
Torbay Tourism Association, Torquay
Totaljobs Group, London
Town & Country Lodge, Bristol
Town House Collection, Edinburgh
Travelodge Hotels, Thame
Travlaw LLP, Leeds
Treglos Hotel, Nr Padstow
Trump International, Balmedie
Trunkwell Mansion House, Reading
Turpin Smale Catering Consultancy, London
Twelve Restaurant & Lounge Bar, Thornton-Cleveleys
Twycross Zoo, Atherstone
Tynedale Hotel, Llandudno
Union Jack Club, London
University College Birmingham, Birmingham
University of Central Lancashire, Preston
University of Derby, Derby
University of Northumbria, Newcastle upon Tyne
University of Portsmouth, Portsmouth
University of Surrey, Guildford
University of Ulster, Newtownabbey
University of West London, London
Utilitywise Plc., South Shields
Vacherin, London
Vegas Hotel, London
Venners, Harlow
Vinoteca, London
Vivo Taste, London
Vrisaki, London
W Shipsey & Sons, Salisbury
W7, Emsworth
Warren House, Kingston
Wasco, Bala
Wateredge Inn, Ambleside
Waterscan, Chichester
Wembley National Stadium, London
Wentworth Club, Virginia Water
Wentworth Hotel, Aldeburgh
Westminster Kingsway College, London
Westmorland Limited, Penrith
Weston Park Enterprises, Nr Shifnal
Westport Serviced Apartments, Dundee
Wetherby Whaler Group, Wetherby
Wetherby Whaler Wakefield, Wakefield

Whistle Hospitality Marketing, Northwich
Whitbread Hotels & Restaurants, Dunstable
Wildmoor Kings Head Cirencester LLP, Cirencester
William Murray Communications, Croydon
Williamson Morton Thornton LLP, St Albans
Windsor House Hotel, London
Winnow Solutions, London
Winteringham Fields, Scunthorpe
Witchery by the Castle, Edinburgh
Wm Consultancy, Dublin
Woodland Country House Hotel, Highbridge
Worsley Arms, York
Wyndham Hotel Group Europe, London
Yasmeen Restaurant and Catering, London
Yo! Sushi, London
Young Cheng, London
Yuet Ben Restaurant, Liverpool

Our business partners support the aims, objectives and values of the BHA. BHA members have also told us that certain services are essential to make their businesses run more smoothly, be more cost-effective, and profitable. Therefore they have access to attractive offers from BHA partners that have been picked for their qualities and services.

The Hospitality Economy Partnership group



Business Partners





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