Creating Jobs in Britain – A Hospitality Economy Proposition

A Report by the British Hospitality Association

NOVEMBER 2010

BRITISH HOSPITALITY Association

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The British Hospitality Association, incorporating The Restaurant Association, is the national trade association for the hotel, restaurant and catering industry. It has in membership almost every publicly quoted hotel group, many independent hotels, restaurants and clubs, major food and service management companies, motorway service operators and many local hospitality associations, as well as hospitality education establishments. In total, it represents more than 40,000 establishments with over 500,000 employees across the UK.

The association promotes the interests of the entire hospitality industry to government ministers, MPs and MEPs, members of the Scottish Parliament and Welsh Assembly, the EU Commission, the City and the media.

Foreword

The past three years have been tough for the hospitality industry as they have for all UK businesses. Now, despite continued headwinds and intensified global competition for demand and resources, the industry's confidence is returning. This is the right time for our industry to engage with the government in order to maximise hospitality's contribution to economic recovery and growth across the UK.

Generating eight per cent of total employment, hospitality is already the UK's fifth biggest industry, ahead of the financial services, transport and communications and construction sectors. As the engine of tourism and other sectors, which rely on a dynamic hospitality industry, the potential for further job-creation, export earnings and investment is yet to be fully tapped.

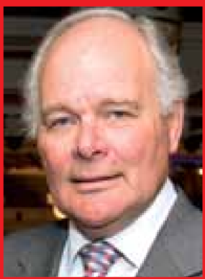
Maximising the economic and social contribution of hospitality needs the active engagement of government on a broad front, from tax, infrastructure and planning through to education and health policy. Effectively coupled with the enterprise and experience of industry, a proactive partnership can help to propel a competitive and successful hospitality industry – an industry primed to address key national objectives: reducing the budget deficit, creating new jobs, tackling long-term unemployment and the regeneration of vibrant communities across Britain.

As the organisation representing more than 40,000 hospitality businesses with 500,000 employees across the UK, the British Hospitality Association is launching this pragmatic opportunity for partnership between government and industry to achieve a shared goal of sustainable economic growth.

We look forward to working collaboratively with government to achieve this great prize – to the benefit of our members and to the benefit of Britain.

Sir David Michels
President

Ufi Ibrahim
Chief Executive



Dudley Osborn
Chairman, BHA National Executive

The British Hospitality Economy Proposition

Hospitality is Britain's fifth largest industry, directly employing more than 2.4m people and contributing over £34bn in gross tax revenues.

The wealth and employment generated through hospitality is spread across the UK, providing economic opportunities where jobs are most needed – from the Highlands of Scotland to the South West of England – as well in major cities, such as London or Edinburgh. As an industry comprising internationally renowned businesses and a significant proportion of small enterprises, hospitality actively strengthens the social fabric of local communities throughout the UK.

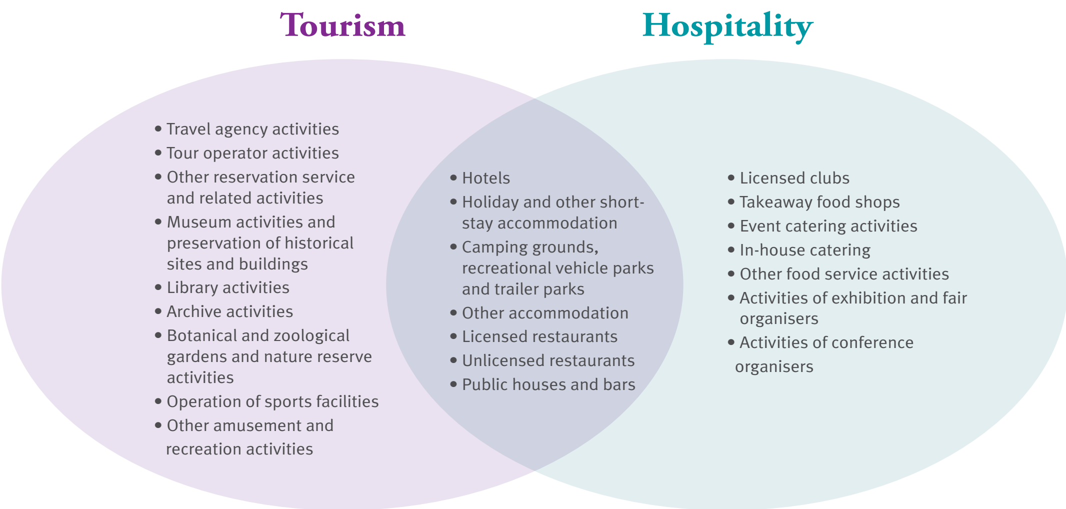
According to an independent Oxford Economics study, commissioned by the BHA, there is a real opportunity for hospitality to generate 236,000 net additional jobs across the UK by 2015, bringing the total number in employment through the British hospitality economy to 2.76m (from the current 2.44m in 2010).

This report outlines a proposition to government for an active and positive partnership to position hospitality firmly as a key driver of economic recovery, sustainable growth. This proposition sets out the principal areas of collaborative action, offering recommendations to government as well as setting down the key commitments of the BHA towards job creation in Britain.

The hospitality economy includes:

- **Hotels and related services** (including camping grounds and other accommodation)
- **Restaurants and related services** (including pubs, takeaway food shops, licensed clubs and motorway service areas, where hospitality services are the main activity for the latter)
- **Catering** (including contract catering to both private and public sector clients, and in-house catering across non-hospitality direct sectors such as health and education)
- **Event management** (including conference and exhibition organisers)
- And temporary agency employment across these sub-sectors.

Hospitality is an active engine of travel and tourism to and within the UK. Without a dynamic hospitality economy, Britain cannot enjoy a thriving tourism industry. According to Visit Britain, tourism contributes £114bn to the UK economy.



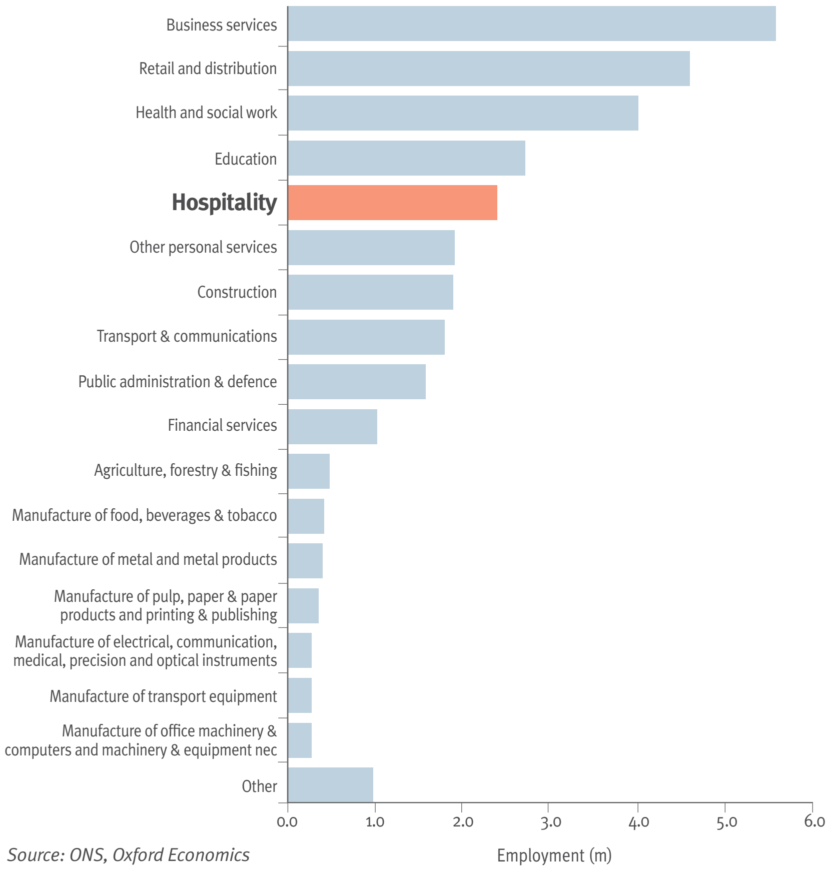
Hospitality Economy UK Contribution

- The core hospitality economy[1] has an estimated turnover of £90bn and directly contributes £46bn to the UK economy in GVA[2].
- Accounts for eight per cent of total employment in the UK, generating 2.44m jobs (one in every 13). This positions the industry as the fifth largest industry in the UK.
- The hospitality economy generates an additional 1.2m jobs through multiplier effects throughout the UK economy. Nearly 700,000 of these multiplier jobs are via supply–chain purchases with two-thirds of these in three sectors – food and beverage manufacture, agriculture and business services.
- The core hospitality economy is estimated to contribute directly £34bn in gross tax revenues to the Treasury, equivalent to six per cent of annual Exchequer tax receipts.
- Estimates of exports (i.e., attributable in-bound spending) indicate that the industry accounts for £7.4bn of foreign exchange earnings.

[1] Direct industry impact [2] GVA: Gross Value Added

Hospitality Employment Contribution versus Other Sectors

UK: Employment 2010



Source: ONS, Oxford Economics

Hospitality Economy Future Scenario Contribution

The Prime Minister's speech on tourism on 12 August 2010 was well received by our members because it offered a degree of strategic insight and support that we have not always had. The coalition government's desire to build 'a fairer and more balanced economy... 'where new businesses and economic opportunities are more evenly shared between regions and industries' underlines the central importance of the hospitality economy.

In his speech, the Prime Minister laid down two major objectives:

- For Britain to be one of the top five destinations in the world in terms of revenue from inbound tourism (we are currently seventh); and,
- To lift the proportion of what British people spend on holiday in the UK to 50 per cent (currently 36 per cent of total tourism spend).

In response, the BHA commissioned Oxford Economics to provide scenario analysis of the future contribution of the hospitality economy. Full findings are detailed in the Oxford Economics report launched alongside this BHA proposition.

According to their study, given the right framework, there is a real opportunity for hospitality economy jobs in Britain to rise to 2.76m by 2015 and 3.09m jobs by 2020, from 2.44m jobs currently.

The Proposition for Partnership – Key Actions

BHA, with its members, has set the agenda summarised below and detailed in the remainder of this report, which is to work towards the objective of creating wealth, prosperity and jobs across Britain through the hospitality economy. However, policy and regulation can either make or break the objective to generate 236,000 additional jobs through the hospitality economy by 2015. This BHA proposition sets out priority actions for government and industry which are suitable (they comply with national objectives), feasible (they avoid any additional cost to government) and acceptable (they will generate win-win scenarios for the industry, government and Britain at large).

THE BHA CALLS ON GOVERNMENT TO:

Champion the hospitality economy by:

- Holding annual meetings for the Prime Minister and key Cabinet Ministers with leading members of the BHA so that the key challenges facing the hospitality economy can be discussed at the highest level.
- Establishing a cross-cabinet committee for hospitality and tourism to coordinate policy and enhance cohesion across government departments.
- Joining up – to a greater degree – with colleagues in Scotland, Wales and Northern Ireland to enhance the visibility and reach of Britain as an international tourism destination across the world.
- Supporting the UK's national tourist boards as central to the success of the hospitality and tourism industry – with security for their long-term future and a greater level of commercial focus.
- Ensuring an effective presence from the hospitality and tourism industry on the Regional Growth Fund Advisory Panel.
- Influencing Local Enterprise Partnerships (LEPs) to embrace hospitality and tourism as a key pillar of their local economies and ensuring that, in the transition period for the abolition of Regional Development Agencies, the existing regional tourism budgets are not lost.

Build Britain’s competitiveness by:

- Collaborating with industry on a joint-study on the impact of the rate of VAT on hotel accommodation, visitor attractions and restaurant meals. Evidence gathered from this study will enable sound decision-making toward effective and timely changes to VAT to stimulate demand and thereby economic growth.
- Prioritising the facilitation of travel to the UK by easing the visa application procedure and ensuring that visa prices are internationally competitive.
- Ensuring that visitors to the UK receive a sense of welcome on arrival by integrating the ‘visitor experience’ as an essential skill-set of the UK Border Agency.
- Stimulating investment continually to improve and upgrade hospitality infrastructure through a change in legislation making it easier for hotels to operate within the framework for Real Estate Investment Trusts.
- Minimising regulatory burdens on the sector and actively involving the industry in determining the scope, impact and purpose of legislation before enactment. The cross-Whitehall Tourism Group should be revived.
- Providing a level playing field and fair basis for comparison between private and public sector bids for the outsourcing of food service and general facilities management, enabling commercial companies to bring greater efficiencies to public services across the UK.
- Developing the pre-election government proposal for a Hospitality Service Academy as a practical and innovative way of tackling long-term unemployment and encouraging greater social mobility.
- Scrapping plans for the introduction of a permanent cap on migration of TIER 2 workers from outside the European Economic Area.

As a pragmatic partner of government, the BHA is committed to supporting the effort to create additional jobs by:

- Organising a bi-annual hospitality, tourism and leisure leaders’ gathering to unite the entire sector and help it realise its potential for growth. The first of these high-level conferences will be arranged to take place in 2012 as our commitment to extend the tourism legacy of the Olympic Games for the UK.
- Actively working with government and experts on a joint-study into the existing rate of VAT and to ensure that it reaches conclusions, objectively, based on clear data.
- Supporting the work of the various ‘Visit’ agencies and work with them to achieve match-funding on sensible commercial lines, offering our industry’s experience and contributing to the implementation of effective research.
- Assisting the work of the UK Border Agency in embracing the ‘visitor experience’ as part of its operational excellence. We will offer expert guidance on how the culture of the organisation can be reformed.
- Through the active participation of BHA members, we will support the establishment of Local Enterprise Partnerships and we will work with Visit England to achieve a dynamic private sector presence in the running of local Destination Marketing Organisations.
- Participating in the Regional Growth Advisory Panel, ensuring that tourism and hospitality – and the regions outside London and the South-East – are properly represented.
- Collaborating with the Departments of Business, Health and Environment in reviewing planned changes in regulations to ensure that growth in the sector is not compromised.
- Sharing our members’ expertise in procurement to enable the public sector to manage this function more effectively.
- Supporting the establishment of a Hospitality Service Academy and working with the Sector Skills Council People 1st on imaginative and commercially robust programmes that tackle long-term unemployment and skills shortages.
- Positively contributing to government programmes designed to tackle the rise in obesity and to work towards wellness and health across the UK by encouraging chefs to improve their skills in delivering healthy and nutritious food and operators to offer healthy choice menus.
- Making sustainability a key priority for BHA and assisting members to meet government targets for reducing their carbon footprint, without adding unduly to their administrative burden, by working with BHA supply members and others to make sustainability the heart of the industry’s strategy.

Introduction to the Proposition

The extremely demanding economic climate and the formation of the new Coalition government presented the association with both a challenge and an opportunity: a challenge because the trading environment is and will remain very difficult, and an opportunity because the new government has signalled its recognition of the importance of the hospitality sector to the UK economy.

The BHA commissioned Oxford Economics to quantify the contribution made by the hospitality sector to the UK economy and its detailed report (*Economic Contribution of the UK Hospitality industry*) is published alongside this proposition.

The Oxford Economics report reveals the potential of the industry (see page 3). This accompanying report sets out a public/private partnership proposal to generate an additional 236,000 jobs through the hospitality economy by 2015. BHA members believe that the more the government embraces our agenda, the greater will be the prospect of creating economic prosperity through our industry.

At this heart of this proposal are the following objectives, all of which are in line with UK national objectives and therefore should form the basis of partnership with government:

1. To make Britain a world-class destination for tourism and business.

2. To work in partnership with industry and government to propel hospitality's contribution to economic recovery, rebalancing growth and the regeneration of local communities.

3. To harness the knowledge and capabilities of the members of the BHA to help achieve a transformation in the efficiency and commercialism of the public sector, without additional burdens of cost on government or industry.

This proposition is structured around three key areas:

1 Championing the Hospitality Economy

2 Building Competitiveness

3 Efficiency and Transformation for Long-Term Success

Championing the Hospitality Economy

1

Dialogue with the highest levels of government

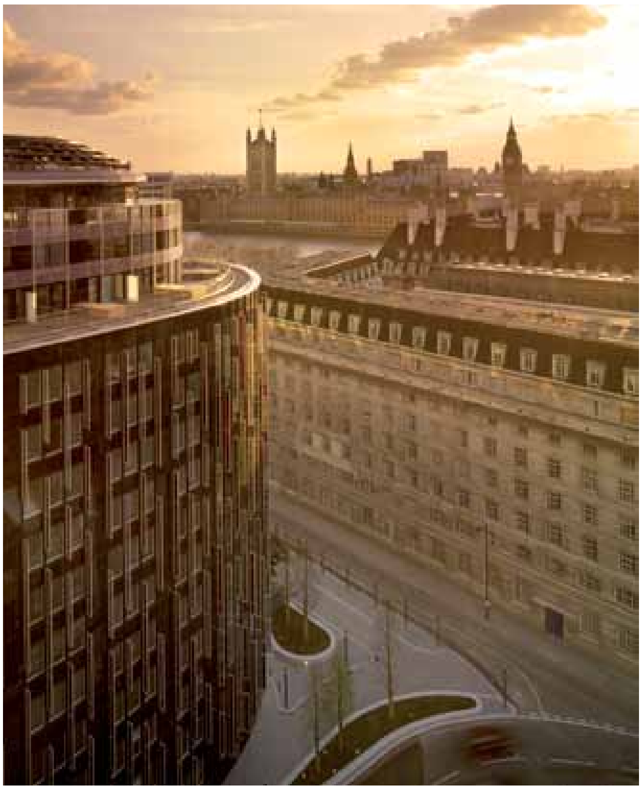
For too long, the economic importance of hospitality has been unrecognised. We are seeking a real change from the new government to achieve a strong partnership that benefits both members, the wider society and the UK economy in general.

David Cameron's speech on tourism is heralded by BHA members as being one of the first by a British Prime Minister to recognise the importance of the sector. A review of other countries that have pursued successful hospitality and tourism strategies in recent years provides evidence of strong leadership for the sector from the highest levels of government. The Premier of China, the President of India, the President of Brazil and the Prime Minister of Spain have all championed the industry as a major contributor to economic progression and job creation. However, in these countries and others, including the United States, a board of industry leaders meets regularly with the head of government and other key cabinet ministers to discuss key issues or opportunities facing the sector.

Dialogue at the top levels of government helps to ensure that key issues, priorities and opportunities can be discussed and that adequate leadership is provided to facilitate development of the industry.

We have a tremendous opportunity to see substantial and beneficial growth from the sector and we want to see an enduring commitment from the government at the highest level. We call on government to hold annual meetings between senior cabinet ministers, led by the prime minister, and the leaders of our industry.

To support this aim, BHA will organise a biannual hospitality, leisure and tourism leaders' conference to provide a forum where the entire sector can be brought together to help us achieve the industry's potential in a collective way. This gathering will help us unite what is presently a fragmented sector: this alone will help in realising the tremendous potential of the industry. We will organise the first of these events to take place in 2012, as our commitment to extending the legacy of the Olympic Games and to set a benchmark for public and private sector partnership in the meetings industry of the United Kingdom.



Cross-cabinet committee for hospitality and tourism

It is frustrating and self-defeating to have a grand design if one government policy pushes the industry forward and another policy drags it back. Hospitality and tourism is affected by policy decisions taken across several government departments including treasury, education, health, local governments, DEFRA, DECC, transport and the Home Office. Far too often, decisions taken in one department have an adverse impact on our industry. In most cases, impacts on hospitality and tourism are unintentional, resulting from a lack of understanding of the sector in the formulation of that policy.

A permanent cross-cabinet committee for hospitality and tourism would make a significant difference to ensure a supportive regulatory framework for the industry and to facilitate the industry's potential contribution to job creation across the UK.

BHA members urge the prime minister to establish and lead the cross-cabinet committee for hospitality and tourism. By engaging senior cabinet ministers, this will help to ensure that the decisions of individual departments do not hinder efforts to achieve the objectives set out in the prime minister's speech on 12 August 2010, or damage the tremendous opportunity for the creation of 236,000 jobs in the UK by 2015.

Regionalism and Local Enterprise Partnerships

There has been a high level of frustration among the members of the BHA at the 'organisational spaghetti' of tourism promotion agencies with too much confusion caused by either a duplication of activity or, in some cases, by inconsistent levels of activity. We are now in the transition from the Regional Development Agencies to the formation of Local Enterprise Partnerships. For the first time in decades, there is no set, organised regional dimension to the promotion of tourism in England. VisitEngland will remain responsible at the national level for providing direction, leadership and advice to local Destination Marketing Organisations (DMOs) which will have to fight their corner inside the new, emerging LEPs.

It is, of course, a much looser, more *laissez faire* approach reflecting, in part, the change in the intellectual convictions of the government and the desire to move away from a more regulated and bureaucratic model. It is a clearer, simpler organisational model and a change of direction we welcome. But, for the new arrangements to work effectively, several things must happen.

The minister responsible for tourism, and VE, should champion the importance of tourism within government. Wherever there is evidence of an LEP failing adequately to include hospitality and tourism in its strategy, the minister should step in to provide the right direction.

Early evidence from the North East, however, for example, is not encouraging. Putting aside the apparent difference of view between the business and local government departments in the initial response to the bids, only one of the five LEP bids made a specific mention of tourism; the proposal for Durham would see little or no private sector leadership as it would be based on an existing, largely local authority run and funded Economic Partnership.

The value of hospitality and tourism to local economies was recognised by some of the RDAs and this must not be lost in the transition to the new structure. The BHA is particularly concerned not to lose the £60m worth of regional funding in this transition. If it is, there is a risk that many DMOs will close.

The most successful local tourism organisations are characterised by great entrepreneurial leadership and the new organisational framework can work well. But it will mean a much closer, more collaborative relationship between the minister, VE and the BHA. The ambition to get increasing levels of match-funding is more likely to be realised with the active involvement of the private sector.

All ministers – and indeed all MPs – should be encouraged to support the active promotion of the sector; it must be seen as a 'new' sector and one vital for the growth of the economy as a whole.

VE will need the active support and participation of members in providing leadership to the network of local organisations. VE will have to rely upon the quality of the service it can provide.

The leadership of VE must ensure that members of the BHA and their key people are fully utilised in the LEPs. The government wants the LEPs to be business-led and the BHA will urge a careful review of the bids to ensure that they do not end up with an unrealistically high and unsustainable number of partnerships.

Regional Growth Fund

The Regional Growth Fund Advisory Panel should have members who understand the powerful contribution hospitality and tourism can make to local re-generation.

It is expected that much of the Fund will be used to support activity outside London and the South East and the Oxford Economics report has shown the importance of hospitality in all parts of Britain to overall employment levels. The Regional Growth Fund will be an important stimulus.

The BHA will urge the Advisory Panel to have an effective presence from the tourism and hospitality sector.

Building Competitiveness

2

The international marketplace is extremely competitive and a study of the United States, China, Singapore or Mexico shows the level of ambition of other countries is significant. For example, China accepts that tourism is one of the five pillars of the country's economy and major investment in infrastructure (including more than 50 new airports and high-speed rail across the country), more tourism and hospitality education, training and intensified marketing and promotion show that China is now a major global competitor. We are facing increased competition from established tourist destinations in Europe and elsewhere as well as those which are rapidly becoming more popular, such as India, Turkey, the Middle East, emerging countries in the Far East and South America. A look at the level of marketing activity inside Britain by other countries also emphasises how competitive world tourism has become.

Britain's ability to compete for demand and resources in the global hospitality and tourism market will depend on our success in a number of areas including price, quality, access, visibility and reach.

Price

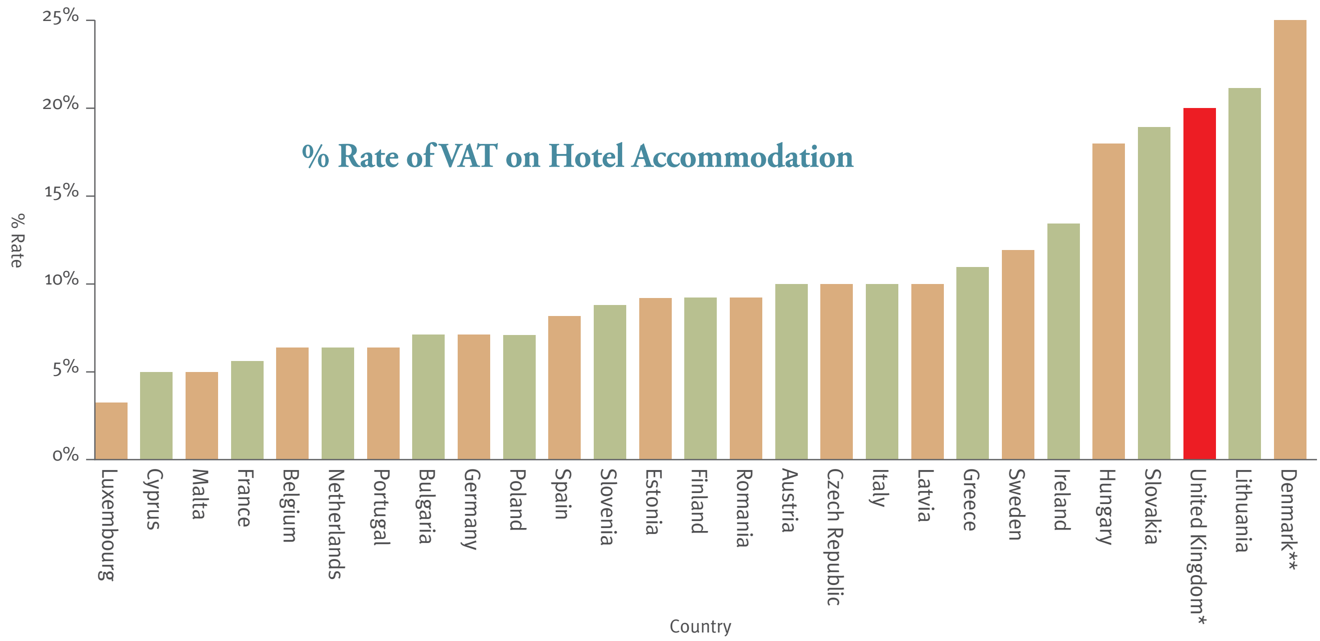
There is evidence of a clear relationship between our prices in Britain and the aforementioned decline in our competitiveness. The 2009 World Economic Forum Travel and Tourism Competitiveness Report stated that:

'In their choice of destination, tourists consider the price (cost of living) at the destination relative to the costs of living at the origin and substitute destinations..............The impact of competing destinations has a positive influence on the demand for international tourism, meaning that a rise in price to one destination will boost visitor numbers to substitute destinations.'

The need to tackle the level of public borrowing in the UK is obvious and the coalition government has decided to increase VAT to 20 per cent from January 2011. We understand that the deficit must be reduced and entirely welcome the determination of the government to see a recovery led by the private sector. Given the huge pressure on consumer spending in recent years and the upheaval caused by the financial crisis, we are seeking a straightforward progress towards sustainable economic growth. We recognise that, at present, there is no prospect of either a reduction in VAT or the introduction of differentiated levels of VAT designed to stimulate the sector.

However, as the table below illustrates, Britain is out of line with the great majority of other EU member states in having VAT at 20 per cent for hotel accommodation (analysis on restaurant meals offers a broadly similar disparity in relation to our main EU competitors).

Some of our principal European competitors in the battle to gain an increasing level of market share from international visitors – France and Germany, for example – have very noticeably lower rates. The rate of VAT is not the only determining factor influencing a traveller's choice of destination as exchange rates are also important. However, relative levels of VAT put Britain at a significant competitive disadvantage.



* from 4th January 2011 ** As noted in the Oxford Economics report, there is some suggestion of Denmark planning to lower its rate of VAT.

The clear view amongst our members is that if Britain is to grow and develop its hospitality and tourism sector and meet the targets set for it, a continuing VAT rate of 20 per cent will act as a decisive break on that ambition.

We are realistic about the present situation but hope that the government will agree to our recommendation that this should be the subject of detailed study on a jointly agreed basis. We know that there is a preparedness for specialist research to be commissioned on the effects of the VAT rate on the sector (and related sectors) and believe that this should be done collaboratively with the minister and the Treasury. Included in the review should be the issue of net pricing to allay fears that a price reduction would not be passed on to the customer, the scope of any differentiated rate – we would favour it being extended to visitor attractions and to restaurant (and similar) meals – and other related areas. Many people who favour a reduction in VAT rates for the sector have argued that, in the longer term, total revenues would increase. The BHA stands ready to work with government and experts to prepare an evidence-based study that will provide a sound tool for decision-making by the Treasury in a timely manner.

Visibility and Reach

Despite recent cutbacks, the government's spending review will mean further substantial reductions in the budgets for VisitBritain (VB) and VisitEngland (VE), with VE running on 25 per cent less funding than three years ago.

In one respect, of course, our members will have some sympathy with the view that, as the private sector has had to take out sometimes as much as 20 pert cent of its cost base in recent years to stay competitive, it is only reasonable that the public sector should be obliged to follow suit. But we think that there are some important differences. When private organisations attack their cost base, it has the effect of boosting productivity and profits and generates resources for further investment.

Over the medium term VB and VE should be run on more commercial lines, so that as international and domestic tourist numbers meet or beat their respective targets, the level of central funding would go up. We support incentives such as these.

After the foot-and-mouth crisis hit UK hospitality and tourism, the private sector stepped in to support an extraordinary fund to rebuild demand. In such extreme circumstances, the private sector may be able and willing to provide match funding again. However, there is little, if any, prospect of the private sector simply stepping in to maintain existing budgets, particularly if these contributions cannot be sustained in the longer term, thereby affecting the future success of the industry. The level of investment in marketing within the UK by hotel companies aiming to boost short-breaks and other holidays, and by restaurant companies promoting meal uptake, already runs into millions of pounds. These campaigns directly encourage UK residents to stay within the country for their holidays and emphasise the industry's commitment to increasing domestic 'staycations'.

Where there may be scope for companies to use some of their existing marketing and promotional spend in activities and campaigns led by VB/VE (as recently shown by British Airways collaborating with VisitBritain) it will be much easier for VB/VE to attract private sector support for match-funding if the sector believes that there is a credible long-term strategy for growing international tourism to Britain.

A determined and coherent strategy to win larger shares of our key source markets, including the domestic market, is essential. Effective marketing and high quality, commercial leadership on the ground are vital and the BHA is very willing to work with VB/VE and government on ways to achieve this objective. In particular, we urge government to embrace three important considerations:

- There needs to be a clear agreement between VB and VE and their counterparts in Scotland and Wales on the priorities of their campaigns. In addition, there needs to be an absolutely clear relationship between all the different agencies involved to avoid any duplication of activity.

- There is a real willingness on the part of BHA members for some of their most talented managers to contribute to the strategies and marketing efforts of the national tourist boards. Utilising private sector know-how and experience could provide cost savings to the various agencies, while enhancing the effectiveness of strategic marketing plans and campaigns.

- But we have to introduce a note of caution – Britain is facing an increasingly competitive international environment. In the private sector, companies take a long-term view. Is this a business we want to be in? What will be our return? What resources do we have to provide? We need an equally clear commitment from government on the future of tourism to enable Britain to grow its share of the world markets.

In this respect, we look to the DCMS minister for tourism to enhance joined-up efforts with colleagues in Scotland and Wales to take advantage of economies of scale and to improve the promotion of UK tourism, providing clear, quantifiable objectives for both domestic and international tourist numbers.

BHA members have extensive experience in researching and understanding the relationship between the capability of their workforce, the guest experience, the price premium that can be justified and the likelihood of a return visit or repeat business. The data are used to shape strategy and reward individual performance.

Exactly the same principles should apply to guests coming to this country and we would be happy to work with the minister and VB on researching hard comparative data on visitor attraction and retention. A similar approach can be used by VE, Visit Scotland and Visit Wales to attract the interest of British tourists.

Visas

A coherent strategy for hospitality and tourism has to address the issue of visas – how they are obtained and how much they cost. We understand the reasons for the government's decision to remain outside the Schengen Agreement but this has implications for the tourism strategy. It is easier and less expensive for travellers from China and other major source countries to go to other European countries than it is for them to travel to Britain.

According to the Tourism Alliance, currently, the UK is the 22nd most popular destination for Chinese travellers, with a share of 0.5 per cent of the Chinese outbound market. Increasing our share to 2.5 per cent of this market would add more than £500m to the UK economy and create about 10,000 jobs in hospitality and tourism.

The government must make it a priority to put in place less expensive and more straightforward procedures for visas. Facilitating travel through effective and competitive visa procedures is critical.

UK Border Agency

Hospitality is at the core of every travel experience. The sense of welcome is the first and in many cases the lasting impression. Therefore, it is concerning that the UK Border Agency staff do not have 'the visitor experience' or 'improving the welcome visitors obtain' as part of their essential skill set.

Appreciating the importance of a hospitable welcome, the US Immigration Service recently engaged Disney's in-house Training and Customer Care function to train its front-line staff. Britain needs the same level of ambition and far-sightedness.

BHA members are skilled in customer care techniques. We would welcome a partnership with the UK Border Agency to introduce these skill-sets and to aid with training needs.

Transport

The UK's transport provision does not always compare well with competitor destinations. Transport planners and policy makers pay insufficient regard to the fact that tourism accounts for about two-thirds of all long-distance travel in Britain and about one-third of all rail travel in England.

The present tendency of policy makers to deal with the static population must be balanced with the importance of tourism and leisure to the country's national economic wellbeing. The BHA will pursue this issue in discussions with government and other agencies.

Quality of products

Increased hotel development – particularly full service hotels – is important for job creation and stimulating local economies. But hotels are expensive to develop and usually require institutional capital. The experience of other countries suggests that there are ways to stimulate development by putting in place fiscally advantageous Real Estate Investment Trusts. The lack of a REIT for the hospitality sector is holding back growth.

A UK REIT is a UK registered company or group undertaking a 'property rental business'. The UK REIT regime was introduced in 2007 and there are now 21 of them accounting for about three-quarters of the listed property sector – but none of these is in the hospitality sector.

The UK REIT sector is in its infancy compared to similar regimes in other countries. The fact that there has not been a REIT in the hospitality sector is partly due to market conditions but also due to the stringent requirements that have to be met in order to qualify for REIT status. These requirements are not fully compatible with the hospitality sector business model which, essentially, is an active business operated from properties.

UK REITs are exempt from Corporation Tax on rental income and capital gains from their property rental business. Income and capital which are not derived from the property rental activities are part of the residual business and are subject to Corporation Tax. The broad intention of the regime is to replicate the tax treatment of a direct investment in property. To achieve this, rental income and gains are exempt at the UK REIT level but are taxed at investor level when received by way of a dividend.

The UK REIT regime gives investors an opportunity to tap into a liquid and publicly available source of property investment. Investors find them attractive because they allow a diversity of investments and enable them to access previously inaccessible parts of the property sector (such as shopping centres).

Presently, many of the hotel groups that could convert to a REIT are not paying UK Corporation Tax because of the recession. It is fair to conclude that the Exchequer would benefit in the short to medium term (attractive because of today's deficit); a longer term analysis is harder because the total tax take would depend on the tax and resident status of the investors.

A change in UK legislation to allow for taxable operating hotel subsidiaries (in line with international norms) would facilitate the conversion of hotel companies to REIT status. In turn, this would allow the REITs to acquire and develop to a higher standard some of the UK's weaker and unbranded UK assets.

Members of the global hospitality team at Deloitte are among many experts in the field who feel that such a legislative change could create additional jobs in both construction and the hospitality sector, supporting the drive to make Britain a world-class tourism destination.

Quality of service

EMPLOYMENT AND SKILLS DEVELOPMENT

There is a unanimous view amongst our members that the government – and all MPs – should recognise the hospitality industry for what it is: an industry that rewards employees who work hard, demonstrate flexibility and team work and deliver great service. In other countries, for example the United States, students financing their way through colleges work in bars, restaurants and hotels with no-one viewing it as a second class job. We want to see the industry held out as a great vehicle for social mobility.

The hospitality economy is a huge engine for job creation throughout the country. As importantly, it is a huge engine for recruiting people with few or no qualifications and giving the chance to progress.

Jens Hofma, the Dutch-born CEO of Pizza Hut, made the point strongly in an article published by *The Times* two months ago –' And why not a big hand for the waiter too?' One of the key themes of his article is that jobs regarded as menial in the UK are just as crucial to our economy as an Oxbridge degree.

The Sector Skills Council for the sector, People 1st, is focusing on three core areas (leadership and management, chef training and customer service). We support its idea of a Service Academy (actually included in the Conservative party's manifesto). This imaginative idea to involve 25 employers to make available 50,000 training places for the long-term unemployed with a guarantee of making 10,000 positions permanently available, is exactly the sort of active private sector involvement we want.

The BHA will support People 1st in persuading government departments to trust business to do the job of developing people. Some of the training bodies that the government has used are not well regarded or have been inconsistent in their performance.

We want the government to concentrate its efforts, whenever it can, on reducing the personal tax burden and providing the incentive for people to work (in an industry that works 24/7), more hours if they wish in order to earn more. For the industry that has such a key role to play in creating more jobs, increases in the National Minimum Wage exert an upward pressure on payroll costs at a time of reduced consumer spend.

Immigration

We understand the political pressure behind current proposals to restrict net migration into the UK. However, experience with the temporary cap on migration, introduced in July 2010, shows that it is having a seriously adverse effect on many hospitality businesses: losing a specialist Asian and Oriental chef, whose skills cannot be reproduced in the UK (or elsewhere in Europe), and being unable to replace that person because entry is rationed, leads to a business which can no longer meet the expectations and requirements of its customers. The Migration Advisory Committee (MAC) has accepted that chefs (at NVQ3 level and above, into which category these specialist chefs fall) are a skilled occupation and can be treated as a skilled shortage occupation under the Points Based System.

The temporary cap is being applied clumsily: the permanent cap, presumably set from April 2011 at an even lower level, will have a serious impact on the ability of a number of hospitality businesses to operate at all. The government's plans for a "first come, first served" system will make it impossible for any sensible priorities to be set for who gets in and who does not.

Given the imminence of 2012 and London's hard-won reputation as one of the world's great cities for hospitality, this would be disastrous. The only sensible outcome is for the cap to be scrapped.

Equality issues

Women make up the majority of the workforce in hospitality but, compared to other sectors, are under-represented at board level. This issue is the responsibility of employers. BHA members will support People 1st to develop programmes that address this.

There is also more to be done on accessibility training and provision; more progress on these should be made by the time of the Paralympic Games in 2012.

Efficiency and Transformation for Long-Term Success

3

Regulation

Unnecessary regulation takes time, wastes resources, is inefficient, and means that jobs are lost. Individual regulations may have merit but when added together a collection of bricks becomes a brick wall.

We welcome the inquiries that have been instituted by the government (eg: Lord Young's on the impact of health and safety legislation and the DEFRA Task Force on Farming Regulations).

The BHA will work with the government on reviewing past legislation to identify areas for reform, although we doubt that many existing regulations can be scrapped because of the 'brick wall' syndrome and the increasing influence of EU regulation.

The biggest opportunity we have is in future prevention. It is here that help and leadership is required from our sponsoring minister. Regulation is particularly burdensome on smaller businesses in Britain and we would much prefer voluntary codes to enforced legislation. Whenever new regulations are proposed for the sector we want (i) them sanitised by joint government/industry panels before enactment and (ii) the implementation time to be much greater than in previous years.

Uneven and inconsistent enforcement of regulations is an added burden. Some of the inspections that are carried out are unnecessary. This is particularly true of larger organisations whose own internal standards are often higher than the statutory minimum. The number of inspections carried out by local authorities and other enforcement agencies could be reduced substantially if the third party audits carried out on behalf of companies were recognised.

Outsourcing and procurement

Government must do more to equalise the basis of comparison between a private sector bid and a public sector defence. The biggest issue is the provision that must be made for pension costs in public sector bids which are reckoned to be too low. They have the effect of understating the real level of cost of providing the service and differing levels of transparency – between the public and private sector – on the inclusion of VAT in the contract. There is also a real difference between the operational effectiveness of the National Audit Office and auditors engaged by private companies.

Taken together, they represent a real barrier to entry and they are maintaining a higher level of cost within the public sector which has not yet been addressed by the government. It is in the hospitality industry's interest for the public sector to be more efficient. Catering companies that come into contact with the public sector recognise that it is less efficient in its procurement strategy than the private sector, yet, for some of our members, efficient procurement is the difference between profit and loss.

BHA members in the food service and facilities management area would be happy to provide specialist support in this area and are confident that they would be able to drive down the costs of public sector procurement.

The BHA also believes that the development of group purchasing organisations (particularly in the USA, where some in the medical sector have turnover of over $30bn per year) is most noteworthy. For example, competitors like Marriott, Hyatt, and InterContinental Hotels combine their purchasing power through aggregator companies such as Avendra and drive down costs on spending on generic items. If competitors can do it, surely different departments in the public sector can form such 'aggregator companies'?

There is potential for some of the BHA's SME members to participate in such arrangements to help drive down costs to the advantage of both themselves and the public sector. These arrangements could be co-ordinated through Local Enterprise Partnerships.

Nutrition, health and wellness

With concerns about the continuing rise in the number of clinically obese people in the UK, we support efforts by the Health Department's Responsibility Deal, with which we are working, to encourage businesses to make their contribution to the provision of information on a voluntary basis. We need a clear recognition from government that regulation should be a policy of last resort.

Some of the larger hospitality and catering organisations already carry out significant research to establish what type of information consumers require when choosing food. By sharing this research with the government, a scheme for providing people with nutritional information could be developed collaboratively without creating confusion, acting inconsistently or increasing costs. BHA will encourage this approach.

BHA members also work with FE colleges to improve the skill of chefs in delivering healthy and nutritional food and, with the emergence of Local Enterprise Partnerships, there is a good opportunity to work with local authorities, which BHA will encourage.

Around 20,000 of our member establishments serve alcohol. We support the government's aim of tackling alcohol-related crime and disorder but unnecessary regulation designed to deal with irresponsible operators harms those operators who are totally responsible, raises their cost and damages their profitability.

We support the principle of banning sales of alcohol at below cost and have submitted a more detailed response to the Home Office's consultation exercise, *Rebalancing the Licensing Act*, in relation to England and Wales.

Sustainability

We need to meet government targets on sustainability and encourage all hospitality operators to reduce their carbon footprint.

The BHA is making sustainability one of its key priorities in the coming year. Its strength as an association is that it brings together the whole foodservice industry. We work with food manufacturers like Nestlé and providers such as LG Electronics and Philips Lighting who are at the leading edge of innovation in the area of energy efficiency.

The British government has its own internationally agreed targets to achieve and our industry recognises the contribution it must make. It is a shared responsibility.

The core hospitality sector is already making an important contribution to the country's targets for reductions in energy and water consumption and there is a considerable level of expertise on the subject.

Some organisations placed sustainability at the heart of their strategy well before the global consensus had emerged. It is estimated that hospitality will contribute about eight per cent of the reduction in carbon emissions expected to arise from the implementation of the Carbon Reduction Commitment (CRC) Energy Efficiency Scheme. However, there is a considerable administrative burden arising from the scheme and we welcome the review by the Department for Energy and Climate Change. Members are finding that significant investment in energy data collection and control are needed and the risk is that these costs of compliance face the danger of taking resources away from direct investments in energy efficiency.

Though it is mainly the larger organisations which have made sustainability a central feature of their organisation structure, the progress being made by many independent members in the UK in reducing water usage and energy consumption is considerable.

Conclusion

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This is an ambitious agenda but it reflects the major contribution that the hospitality sector makes to the British economy, and can make in the future. The issues we have raised highlight the key concerns of the industry and the potential damage to growth and job creation if these are left unresolved and UK tourism and hospitality – directly linked and entwined as we have seen – are unable to reach their full potential.

However, we take a positive view of the future and we have been careful to outline solutions to these issues and explain the actions that the BHA and its members are taking in order to bring these solutions to fruition. In almost every case, this implies a positive partnership between industry and government and its agencies. This is particularly timely with the Olympics on the horizon, providing an opportunity to showcase Britain to the world.

The Oxford Economics report provides compelling evidence of the enormous contribution made to the British economy by the hospitality sector.

The ambition now is for BHA to build a Hospitality Economy Partnership with government so that the sector remains a key pillar of the UK economy, providing more jobs and greater prosperity for individuals, for companies, for the sector as a whole and for the country at large.

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LA GONDOLA RESTAURANT, JERSEY
LA PIAZZA, EDINBURGH
LA PORTE DES INDES, LONDON
LA VERANDA, CARSHALTON
LADY ANNE MIDDLETONS HOTEL, YORK
LAKES HOSPITALITY ASSOCIATION, WINDERMERE
LAKESIDE HOTEL, ULVERSTON
LAMONT PRIDMORE, WORKINGTON
LANCASHIRE AND BLACKPOOL TOURIST BOARD, CHORLEY
LANCASTER LONDON, LONDON
LANCRIGG COUNTRY HOTEL, GRASMERE
LANGAN'S COQ D'OR, LONDON
LANGAR HALL HOTEL, NOTTINGHAM
LANGLEY CASTLE HOTEL, HEXHAM
LANGSTONE CLIFF HOTEL, DAWLISH
LAS IGUANAS (METRODINER LTD), BRISTOL
LASSWADE COUNTRY HOUSE HOTEL, LLANWRTYD WELLS
LASTINGHAM GRANGE HOTEL, YORK
LAVIGNA, LONDON
LAW EXPRESS,BRISTOL
LE CAVEAU, SKIPTON
LE COLOMBIER, LONDON
LE GAVROCHE, LONDON
LE MANOIR AUX QUAT' SAISONS, OXFORD
LE PREMIER COFFEE BAR AND RESTAURANT, BURTON
LEANDER CLUB, HENLEY-ON-THAMES
LEEDS METROPOLITAN UNIVERSITY
LEGACY HOTELS, HENLEY-IN-ARDEN
LEITHS SCHOOL OF FOOD & WINE, LONDON
LEMON TREE BISTRO LTD, FRAMLINGHAM
L'ENCLUME, GRANGE-OVER-SANDS
LEON, LONDON
LES AMIS DE BRULA, TWICKENHAM
LEWISHAM COLLEGE, LONDON
LEXINGTON CATERING LTD, LONDON
LINO'S, WIRRAL
LINTHWAITE HOUSE HOTEL, WINDERMERE
LION HOTEL, CRICCIETH
LITTLE B, SALE
LIVEBOOKINGS LTD, LONDON
LIVERPOOL RESTAURANT ASSOCIATION, LIVERPOOL
LIVING VENTURES RESTAURANTS LTD, KNUTSFORD
LLANDUDNO HOSPITALITY ASSOCIATION, LLANDUDNO
LOCH FYNE RESTAURANTS LTD, TWICKENHAM
LOCH MELFORT HOTEL, OBAN
LODGE HOTELS (LINCOLN) LTD, LUCKINGTON
LONDON BRIDGE HOTEL, LONDON
LONDON FINE DINING GROUP (A-Z RESTAURANTS), LONDON
LONDON HOTEL SCHOOL
LONDON LINEN SUPPLY, MIDDLESEX
LONDON METROPOLITAN UNIVERSITY
LONGVIEW HOTEL, KNUTSFORD
LOS AMIGOS, STOCKPORT
LOSEHILL HOUSE HOTEL, HOPE
LOUGHBOROUGH COLLEGE
LOWRY HOTEL, MANCHESTER
LUCKNAM PARK HOTEL, CHIPPENHAM
LUC'S BRASSERIE, LONDON
MACDONALD HOTELS PLC, GLASGOW
MACINTYRE HUDSON, LONDON
MAEKONG THAI, BROMSGROVE
MAGPIE CAFE, WHITBY
MALMAISON & HOTEL DU VIN HOTELS, LONDON
MAMAS & LEONIES, SHEFFIELD
MANANA RESTAURANT, PWLLHELI
MANCHESTER CITY FOOTBALL CLUB, MANCHESTER
MANDARIN ORIENTAL HYDE PARK, LONDON
MANX HOSPITALITY PARTNERSHIP, ISLE OF MAN
MARAZION HOTEL, MARAZION
MARC LTD, LONDON
MARCHE, BIRMINGHAM
MARCLIFFE AT PITFODELS HOTEL, ABERDEEN
MARLOWS, LEEDS
MARRIOTT INTERNATIONAL, LONDON
MARTINS RESTAURANTS, FAVERSHAM
MASALA WORLD, LONDON
MATRICARDIS BAR & RESTAURANT, HENLEY-IN-ARDEN
MATTHEWS OF BIRMINGHAM, BIRMINGHAM
MAYBOURNE HOTEL GROUP, LONDON
McDONALD'S RESTAURANTS LTD, LONDON
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MELITA HOUSE HOTEL, LONDON

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MERAH, LONDON
MERLYN COURT HOTEL, LONDON
MESON DON FELIPE, LONDON
METHODIST INTERNATIONAL CENTRE, LONDON
METROPOLITAN HOTEL, LONDON
METROPOLITAN RESTAURANTS LTD, LONDON
MILLENNIUM & COPTHORNE HOTELS PLC, LONDON
MILLSTREAM HOTEL, CHICHESTER
MILSOM HOTELS LTD, COLCHESTER
MING COURT, LONDON
MITCHELLS & BUTLERS PLC, BIRMINGHAM
MONTAGUE LLOYD, FALKIRK
MORSTON HALL HOTEL, HOLT
MOSIMANNS LTD, LONDON
MOUNT CHARLES CATERING LTD, BELFAST
MOUNT ROYALE HOTEL, YORK
MR CHAN'S RESTAURANT, ST. HELENS
MR CHOW, LONDON
MR THOMAS'S CHOPHOUSE, MANCHESTER
MUCKRACH LODGE HOTEL & RESTAURANT, GRANTOWN-ON-SPEY
MULLION COVE HOTEL, HELSTON
MUMTAZ RESTAURANT, BRADFORD
MYHOTELS, LONDON
NANDOS CHICKENLAND LTD, LONDON
NATIONAL LIBERAL CLUB, LONDON
NAVARRO'S, LONDON
NEDS NOODLE BAR, LONDON
NESTLE WATERS,RICKMANSWORTH
NETHERWOOD HOTEL, GRANGE-OVER-SANDS
NEW COLLEGE NOTTINGHAM, NOTTINGHAM
NEW ENGLAND HOTEL, LONDON
NEW MAYFLOWER, LONDON
NEW SOUTH DEVON COLLEGE, PAIGNTON
NEW WORLD, LONDON
NEWAY INTERNATIONAL LTD, LONDON
NEWBY BRIDGE HOTEL & LEISURE CENTRE, ULVERSTON
NINCOMSOUP LTD, LONDON
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NORTHCOTE, BLACKBURN
NORTHERN HOTEL, BEXHILL-ON-SEA
NORTHERN IRELAND HOTELS FEDERATION, BELFAST
NORTHERN LAKES ACCOMMODATION PROVIDERS, COCKERMOUTH
NORWICH CITY COLLEGE OF FURTHER AND HIGHER EDUCATION
NOURA BRASSERIE & RESTAURANT, LONDON
NUNZIO'S, BLACKPOOL
NUOVI SAPORI, LONDON
NUTTERS, ROCHDALE
OATLANDS PARK HOTEL, WEYBRIDGE
OCEAN HOTEL, SANDOWN
OCEAN LOUNGE, SOUTH SHIELDS
OCS GROUP UK LTD, CRAWLEY
O'ESTE, ORMSKIRK
OLD BRIDGE HOTEL, HUNTINGDON
OLD COURSE HOTEL, ST ANDREWS
OLD PLOW BISTRO, PRINCES RISBOROUGH
OLD QUAY HOUSE HOTEL, FOWEY
OLDE SHIP HOTEL, SEAHOUSES
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OLIVE TREE RESTAURANT, SOUTHAMPTON
ONE ALDWYCH, LONDON
ONE GREAT GEORGE STREET, LONDON
ONE TEN, BIRMINGHAM
ORIENTAL CLUB, LONDON
OTUS & CO, LONDON
OXFORD & CAMBRIDGE CLUB, LONDON
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OXFORD HOTELS & INNS MANAGEMENT LTD, DARTFORD
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PALM RESTAURANT, LONDON
PAN ASIA RESTAURANT, MANCHESTER
PARAMOUNT RESTAURANTS, LONDON
PARIS HOUSE RESTAURANT, WOBURN
PARK HOUSE, SANDRINGHAM
PARK LANE HOTEL LTD, LONDON
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PARKLANDS HOTEL, MARLBOROUGH
PARKWOOD HOTEL, LONDON
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PATTERSONS, LONDON
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PEKING GARDENS, SUTTON COLDFIELD
PEMBROKESHIRE TOURISM, PEMBROKE
PENKERRIS HOTEL, ST AGNES
PENMAENNUCHAF HALL HOTEL, DOLGELLAU
PENNY BLACK, ALNWICK
PEN-Y-DYFFRYN COUNTY HOTEL, OSWESTRY
PEN-Y-GWRYD HOTEL, CAERNARFON
PEPE SALE, READING
PETIT PARIS, NOTTINGHAM
PHEASANT HOTEL, COCKERMOUTH
PILGRIM HALL HOTEL & CONFERENCE CENTRE, UCKFIELD
PINES HOTEL & HAWORTHS RESTAURANT, CHORLEY
PIPE OF PORT, SOUTHEND-ON-SEA
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PIZZA HUT, BOREHAMWOOD
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PONTIS GROUP LIMITED, LONDON
PORTERS, LONDON
PORTLAND HOTELS, EDINBURGH
PORTMEIRION HOTEL, PENRHYNDEUDRAETH
PORTOBELLO HOTEL, LONDON
POSTILION RESTAURANT, WINDERMERE
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PRINCE HALL HOTEL, YELVERTON
PRINCIPAL HAYLEY HOTELS & CONFERENCE VENUES, HARROGATE
PRIVATE HEALTH PARTNERSHIP, BAILDON
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QHOTELS LIMITED, LEEDS
QUANTUM LEAP EVENTS LTD, LONDON
QUAYSIDE, IPSWICH
QUEENSBERRY HOTEL, BATH
QUEENSWOOD HOTEL, WESTON-SUPER-MARE
R B ENTERPRISES LTD, LONDON
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RADISSON EDWARDIAN HOTELS, HAYES
RAJ OF INDIA, LONDON
RAMADA JARVIS HOTELS PLC, HIGH WYCOMBE
RANKVALE HOSPITALITY LTD, LONDON
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RAVELLO, LONDON
RAVEN HOTEL, MUCH WENLOCK
READS, FAVERSHAM
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RED HERRING, LOWESTOFT
RED HOUSE HOTEL, MATLOCK
RED LEA HOTEL, SCARBOROUGH
REDBRICK HOUSE, MANSFIELD
REDCLIFFE HOTEL, PAIGNTON
REDCOATS FARMHOUSE HOTEL, HITCHIN
REGENT HOTEL, ST IVES
REGIONAL FOOD GROUP ALLIANCE, TADCASTER
RESTAURANT 23, LEAMINGTON SPA
RESTAURANT TRISTAN, HORSHAM
RIBBLE VALLEY INNS, MITTON
RICK'S CAFÉ, LONDON
RING O' ROSES INN, BATH
RISING SUN HOTEL, LYNMOUTH
RIVA, LONDON
RIVER HOTEL, OXFORD
RIVERSFORD HOTEL, BIDEFORD
RIVERSIDE HOTEL & LEISURE CLUB, KENDAL
RIVIERA HOTEL, SIDMOUTH
ROADCHEF HOLDINGS LTD, STAFFORD
ROAST, LONDON
ROSE & CROWN HOTEL, BARNARD CASTLE
ROTHAY GARDEN HOTEL, AMBLESIDE
ROTHAY MANOR HOTEL, AMBLESIDE
ROTHERHAM COLLEGE OF ARTS & TECHNOLOGY
ROWHILL GRANGE HOTEL AND UTOPIA SPA, DARTFORD
ROWLEY'S RESTAURANT, LONDON
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 OAK HOTEL (DENNY) LTD, DENNY
ROYAL SPORTSMAN HOTEL, PORTHMADOG
ROYAL YORK & FAULKNER HOTEL, SIDMOUTH
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RULES, LONDON
RUSSELLS OF YORK LTD, YORK
RUTLAND INN COMPANY LTD, CLIPSHAM
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RYE LODGE HOTEL, RYE
SAF RESTAURANT, LONDON
SALLY CLARKES LTD, LONDON
SALVO'S, LEEDS
SAM'S BRASSERIE, LONDON
SANDAL FARM RESTAURANT, BRADFORD
SANGREELA INDIAN RESTAURANT, NEWCASTLE-UPON-TYNE
SAVILLE CONSULTANCY SERVICES, HEREFORD
SAVOY PARK HOTEL, AYR
SCAFELL HOTEL, KESWICK
SCARBOROUGH HOSPITALITY ASSOCIATION
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SELECT SERVICE PARTNER GROUP LIMITED, LONDON
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SGP PROPERTY & FACILITIES MANAGEMENT, WHITE WALTHAM
SHAKESPEARE HOTEL, LONDON
SHAMBLES, TEDDINGTON
SHAMPERS, LONDON
SHAW COUNTRY HOTEL, MELKSHAM
SHEARINGS HOLIDAY HOTELS, TORQUAY
SHEFFIELD HALLAM UNIVERSITY
SHEPHERDS COUNTY INN, SWANSEA
SHERE LTD, GUILDFORD
SHIRE HOTELS LTD (DANIEL THWAITES), BLACKBURN
SHIREBURN ARMS HOTEL, BLACKBURN
SIAM PARAGON, EAST MOLESEY
SIDMOUTH & DISTRICT HOSPITALITY ASSOCIATION
SIDMOUTH HOTELS LTD, SIDMOUTH
SIENNA RESTAURANT, DORCHESTER
SILVERTSERVICE, DAVENTRY
SIMLA INN TANDOORI RESTAURANT, OLDHAM
SIMPLY SMART GROUP, NEW MALDEN
SINGAPORE GARDEN RESTAURANT, LONDON
SINGLETON LODGE COUNTRY HOUSE HOTEL, POULTON-LE-FYLDE
SKEGNESS, EAST COAST & WOLDS HOSPITALITY ASSOCIATION
SKETCH (LECTURE ROOM & LIBRARY), LONDON
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SODEXO, LONDON
SOFRA, LONDON
SOUS LE NEZ EN VILLE, LEEDS
SOUTH TRAFFORD COLLEGE, ALTRINCHAM
SOUTHPORT HOTELS ASSOCIATION
SPA HOTEL, TUNBRIDGE WELLS
SPAGHETTI HOUSE, LONDON
SPICE VALLEY, BOLTON
ST BRIDE'S HOTEL, SAUNDERSFOOT
ST IVES HOTEL & GUEST HOUSE ASSOCIATION LTD
ST JAMES CLUB, LONDON
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ST PATRICK'S INTERNATIONAL COLLEGE, LONDON
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STAYING COOL LTD, BIRMINGHAM
STEPHENSON HARWOOD, LONDON
STEYNE HOTELS, WORTHING
STIRRUPS COUNTRY HOTEL, BRACKNELL
STOCK HILL, GILLINGHAM
STOKE LODGE HOTEL, DARTMOUTH
STOW LODGE HOTEL, CHELTENHAM
STOWMARKET CATERING, SAXMUNDHAM
STRATFORD-UPON-AVON COLLEGE
STRATTONS HOTEL, SWAFFHAM
STUDIO SIX 1992 LTD, LONDON
STUDLEY HOTEL, HARROGATE
SUPPORT TRAINING & SERVICES PLC, FARNHAM
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SWINTON PARK HOTEL, RIPON
SWISSOTEL LONDON HOWARD, LONDON
TALAD THAI, LONDON
TAMP 'N' SWIRL, NORTHALLERTON
TAMPOPO LTD, MANCHESTER
TASBURGH HOUSE, BATH
TATE CATERING, LONDON
TAURUS, MANCHESTER
TENBY HOUSE HOTEL, TENBY
TERROIRS WINE BAR & RESTAURANT, LONDON
THAI COTTAGE, BERKHAMSTED
THAI POT, LONDON
THAILAND NO 1, LINCOLN
THAI'S SMILE, BOURNEMOUTH
THAMES VALLEY UNIVERSITY, LONDON
THE ANCIENT RAJ, SWINDON
THE ANGEL HOTEL, ABERGAVENNY
THE ANGEL INN, SKIPTON
THE ARCH RESTAURANT, PUDSEY
THE BEECH TREE INN, CARDIFF
THE BELL INN, PETERBOROUGH
THE BELL INN & HILL HOUSE, STANFORD-LE-HOPE
THE BESPOKE HOTEL COMPANY LTD, BEACONSFIELD
THE BLAKENEY HOTEL, BLAKENEY
THE BOAT INN, TOWCESTER
THE BULL AUBERGE, EYE
THE BURGER JOINT, BRISTOL
THE BUXTED INN, UCKFIELD
THE CAPITAL, LONDON
THE CARLTON LODGE HOTEL, YORK
THE CASTLE HOTEL (NEATH) LTD, NEATH
THE CAVENDISH LONDON, LONDON
THE CHAMPANY INN, LINLITHGOW
THE CHOCOLATE CAFE, BURY
THE CHRISTMAS DECORATORS LTD, LIVERPOOL
THE CHURCH INN, CHEADLE
THE CLIVE RESTAURANT WITH ROOMS, LUDLOW
THE COMMONWEALTH CLUB, LONDON
THE COPPER HORSE, SCARBOROUGH
THE COTTAGE HOTEL, KINGSBRIDGE
THE COUNTRYMAN, HORSHAM
THE CROSS HOTEL, KINGUSSIE
THE CROWN, COLCHESTER
THE CURRY CORNER, CHELTENHAM
THE DINING ROOM, ASHBOURNE
THE DINING ROOM AT PURCHASES, CHICHESTER
THE DORCHESTER, LONDON
THE DOYLE COLLECTION, DUBLIN
THE EAST INDIA DEVONSHIRE SPORTS & PUBLIC SCHOOLS, LONDON
THE EVESHAM HOTEL, EVESHAM
THE FAR SYDE, ILKLEY
THE FAT DUCK, MAIDENHEAD
THE FISH PLACE,BEACONSFIELD
THE FISH SHOP, LONDON
THE FRENCH CONNECTION BISTRO, STOURBRIDGE
THE FRENCH TABLE LTD, SURBITON
THE GLASSHOUSE, RICHMOND
THE GODSTONE HOTEL, GODSTONE
THE GORING, LONDON
THE GRANBY INN, MORPETH
THE GREYHOUND INN, STOCKBRIDGE
THE GROUCHO CLUB, LONDON
THE HALCYON, BATH
THE HAT SHOP RESTAURANT, PRESTEIGNE
THE HAXTED MILL RESTAURANT, EDENBRIDGE
THE HONEY TREE, MORECAMBE
THE HONOURABLE SOCIETY OF LINCOLN'S INN, LONDON
THE HORSE & TRUMPET, MARKET HARBOROUGH
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THE HOSTE ARMS HOTEL, KING'S LYNN
THE HOXTON, LONDON
THE INN AT WOBURN, MILTON KEYNES
THE KENSINGTON WINE ROOMS, LONDON
THE LANDMARK GROUP, LONDON
THE LANGHAM LONDON,
THE LANSDOWNE CLUB, LONDON
THE LAST WINE BAR, NORWICH
THE LIGHTHOUSE, ALDEBURGH
THE LIGHTHOUSE, WINDERMERE
THE LIME LEAF, BASINGSTOKE
THE LIME TREE, MANCHESTER
THE LINCOLN CENTRE, LONDON
THE LITTLE YANG SING, MANCHESTER
THE MANDEVILLE HOTEL, LONDON
THE MANOR HOTEL, WEST BEXINGTON
THE MERCURY, BOLTON
THE MILTON, BANCHORY
THE MONTCALM HOTEL NIKKO LONDON
THE MULBERRY TREE, BOUGHTON MONCHELSEA
THE NEW INN, RHYL
THE NEW MILL, EVERSLEY
THE NORTHERN QUARTER RESTAURANT & BAR, MANCHESTER
THE OAKHOUSE HOTEL, AXBRIDGE
THE OLD KINGS ARMS HOTEL, PEMBROKE
THE OLD RECTORY, BROSELEY
THE OLD VICARAGE HOTEL, AMBLESIDE
THE OXO TOWER RESTAURANT, LONDON
THE PEACOCK AT ROWSLEY, ROWSLEY
THE PENN CLUB, LONDON
THE PEPPERPOT, CROMER
THE PIPE & GLASS INN, BEVERLEY
THE PLOUGH AT CLANFIELD, BAMPTON
THE PLOUGH INN, YORK
THE PLOUGH INN, HOPE VALLEY
THE POLASH, SOUTHEND-ON-SEA
THE RITZ, LONDON
THE ROBERT GORDON UNIVERSITY, ABERDEEN
THE ROYAL VICTORIA HOTEL, NEWPORT
THE SAVOY HOTEL, LONDON
THE SEAFOOD RESTAURANT, PADSTOW
THE SHALIMAR, OLDHAM
THE SLOANE CLUB, LONDON
THE SMUGGLERS WHEEL, HAILSHAM
THE SQUARE, LONDON
THE STABLEYARD, WREXHAM
THE STAFFORD HOTEL, LONDON
THE SWAN AT STREATLEY, READING
THE THIRD CROSSING, LOWESTOFT
THE TOURISM BUSINESS, YORK
THE TRAVELLERS CLUB, LONDON
THE UPPER LOUNGE, LONDON
THE VENUE, CLEVELEYS
THE VICTORIA, LONDON
THE VINE RESTAURANT LTD, SEVENOAKS
THE VINEYARD AT STOCKCROSS, NEWBURY
THE WALLS, OSWESTRY
THE WATERSIDE INN, MAIDENHEAD
THE WENTBRIDGE HOUSE HOTEL, PONTEFRACT
THE WHITE HORSE, HARROW ON THE HILL
THE WHITE HOUSE HOTEL, NOTTINGHAM
THE WHITE SWAN INN, PICKERING
THE WOODHOUSE HOTEL, LARGS
THE ZETTER, LONDON
THIRD FORCE CLM LTD, UXBRIDGE
THOMAS RIDLEY FOODSERVICE, BURY ST EDMUNDS
THOMPSON & BRYAN, ALTRINCHAM
THORPENESS HOTEL, ALDEBURGH
THREE ACRES INN, HUDDERSFIELD
THREE COUNTIES HOTEL, HEREFORD
THREE HORSESHOES, BREEDON-ON-THE-HILL
THREE HORSESHOES INN, LEEK
THREE LIONS, FORDINGBRIDGE
THURLESTONE HOTEL, KINGSBRIDGE
TICKTON GRANGE HOTEL, BEVERLEY
TIDES REACH HOTEL, SALCOMBE
TILLMOUTH PARK HOTEL, CORNHILL-ON-TWEED
TINY TIM'S TEAROOM, CANTEBURY
TONGUE HOTEL, LAIRG
TOR DOWN GUEST HOUSE, GLASTONBURY
TORBAY HOSPITALITY ASSOCIATION, TORQUAY
TORQUAY LEISURE HOTELS LTD, TORQUAY
TOWER RESTAURANT, ALNWICK
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TOWN HOUSE COLLECTION, EDINBURGH
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TRAVELODGE,THAME
TREFEDDIAN HOTEL, ABERDOVEY
TREGLOS HOTEL, PADSTOW
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TRUFFLES, LEEDS
TRUNKWELL MANSION HOUSE, READING
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TURPIN SMALE FOODSERVICE CONSULTANCY, LONDON
TWELVE, THORNTON-CLEVELEYS
TWYCROSS ZOO, ATHERSTONE
TYNEDALE HOTEL, LLANDUDNO
UBIQUITOUS CHIP, GLASGOW
UNILEVER BESTFOODS, LEATHERHEAD
UNION JACK CLUB, LONDON
UNIVERSITY COLLEGE BIRMINGHAM
UNIVERSITY COLLEGE FALMOUTH
UNIVERSITY OF BRIGHTON, EASTBOURNE
UNIVERSITY OF CENTRAL LANCASHIRE, PRESTON
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UNIVERSITY OF SURREY, GUILDFORD
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V8 GOURMET GROUP, LONDON
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VANDON HOUSE, LONDON
VANZETTI RESTAURANT, MANCHESTER
VEGAS HOTEL, LONDON
VEGGIE INN, HARROW
VENNELLS RESTAURANT, RIPON
VERZONS COUNTRY HOUSE HOTEL, LEDBURY
VICTORIA HOTEL, BAMBURGH
VICTORIA PARK PLAZA, LONDON
VILLANDRY, LONDON
VINOTECA LTD, LONDON
VON ESSEN HOTELS, RADSTOCK
VRISAKI, LONDON
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WATEREDGE INN, AMBLESIDE
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WENTWORTH CLUB LTD, VIRGINIA WATER
WENTWORTH HOTEL, ALDEBURGH
WEST 10 WINE BAR, SHEFFIELD
WEST PARK CONFERENCE CENTRE, DUNDEE
WESTFIELD HALL HOTEL, SOUTHSEA
WESTMINSTER KINGSWAY COLLEGE, LONDON
WESTMORLAND LIMITED, PENRITH
WESTON MANOR HOTEL, BICESTER
WESTON PARK ENTERPRISES LTD, SHIFNAL
WESTWOOD COUNTRY HOTEL, OXFORD
WETHERBY WHALER GROUP, WETHERBY
WETHERBY WHALER WAKEFIELD, WAKEFIELD
WHITBREAD PLC, LONDON
WHITTLEBURY HALL HOTEL & SPA, TOWCESTER
WILDEBEEST ARMS, NORWICH
WILLIAM MURRAY PR, CROYDON
WILLINGTON HALL HOTEL, TARPORLEY
WILLOWBANK HOTEL, LARGS
WILLOWFIELD HOTEL, CARNFORTH
WILTONS, LONDON
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