THE OVERVIEW

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Budgeting for change

The sector writes to Rishi **P8**

Featured inside

Welcome to THE OVERVIEW

From time to time on this page the UK government may not always be painted in the most positive of lights. A casual reader might surmise that there was no love lost between this hack and those in power and, in the main, that would be an accurate assessment. It's nothing personal, but the lack of support for a sector close to our heart can harden a person.

Is there a softening of the mood? Well no, but the door might be opening to a possible reconciliation, dependent on an improvement in attitude.

At the time of writing it had been confirmed that business minister Paul Scully would meet with a group of the Seat At The Table petitioners calling for a minister for hospitality, where Boris Johnson had previously been uninterested.

Chair of the petitions committee, Catherine McKinnell, said: "While I welcome the prime minister's decision to agree to our call for the government to meet with petitioners and hear their concerns about the need for greater support for the hospitality sector, I hope that the prime minister himself will consider their request that he creates a minister for hospitality to oversee government delivery for this crucial diverse sector.

"Although the government has provided a range of support to the hospitality industry throughout this pandemic, there are still great challenges ahead and a coordinated approach on this issue is vital at this critical time."

So there is hope. But still a lot to do. There are outstanding issues to be resolved such as rents and rates which could yet cripple the sector.

As we wait for the government to work out what hospitality is, HOSPA's Hospitality Help Package is coming together - read more in Jane's column.

March 2021
Inside this issue

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The Overview online
You can login to the membership area on the HOSPA website and read this journal online plus archived copies in the members' area are available at: **www.hospa.org**

Introducing the HOSPA Recovery Package

HOSPA CEO Jane Pendlebury outlines the basics of the HOSPA recovery package – which is centred on advice aimed at helping hoteliers and other hospitality businesses maximise their recovery.

Of course, you don't need me to tell you how tough the last year has been for hospitality. Most of us have experienced first-hand the difficulties of simply trying to survive during a time of heavily impacted (if not non-existent) trade.

For many hospitality businesses, it's proved too much, and we've lost some wonderful establishments through the extreme trials and tribulations imposed on us by the coronavirus crisis. For the rest of the industry, it's mainly been a case of grimly hanging on.

Now though, the end is finally in sight and we have a definite date to aim for. Those of us blessed with an outdoor area can look to open up some form of offering by the 12th April, while the rest of us must wait until the 17th May to continue trading again.

It seems such a long way away though, and again, it may prove too far for some. But, despite this, it does at least leave us with a date to aim for and a definitive point for us to get ourselves fully prepped and fully ready.

It's with this in mind, and with our eyes firmly on the future, that here at HOSPA we've orchestrated a series of advice pieces to help hoteliers and other hospitality providers get fully prepared to not just reopen their doors, but to actively thrive once they've done so.

With an imminent tsunami of demand on the near horizon, there's no better time to capitalise on this and maximise revenues, and it's set to provide a fantastic opportunity for hoteliers to claw back some of the lost revenue of the last year. Consequently then, we need to fully examine all areas of the business to ensure they're finely tuned and ready to go.

At HOSPA, as an organisation, we're

able to call upon a wealth of top industry talent, and we want to use that to our members' advantage by giving this talent the platform to impart knowledge and insight that will help hoteliers and others stay on top and ahead of the game to reap the revenue rewards.

The platform we envisage will consist of a series of videos, only a few minutes in length, but backed with actionable, valuable advice from industry experts, across a variety of fields, who will deliver expert guidance and instruction as to how you can make sure you're perfectly placed to fully embrace the process of recovery once we're back open and back trading. There will be the option to click for more detail on the advice too.

Although many of us may be feeling a degree of despair at how far away reopening still is, it does, at least, give us the time to organise everything to ensure our houses are fully in order. Taking onboard the advice of our industry experts, you can look to implement this within your operations and shore up any potential weak spots.

The key topics will cover finance, revenue management, marketing, technology, asset management, sustainability and more.

We have several contributors already lined up and we've had lots of interest from people keen to take part – both members and sponsors – but we're always open to more. So, if you feel you have something to offer to help others in the industry, then do please get in touch.

However, for now, keep an eye on our socials or visit www.hospa.org/recovery to watch the advice as it gets uploaded video by video. There's some great know-how set to come.

Jane Pendlebury

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The End is Nigh

The COVID-19 outbreak has accelerated time. Early 2020 already feels like a decade ago, not only because we perceive it that way, but also because our world underwent changes that normally happen over decades, not months. The pandemic took everyone by surprise, despite hundreds of experts suddenly appearing who said it was no surprise. Hindsight in a wonderful thing.

Companies had to adapt in days rather than years and in the process, the slate was wiped clean. Anything, and everything is now on the table. This leaves room for opportunities in many industries. Hospitality is no exception.

Crisis like COVID-19 are not as rare as you may think. Humans have a knack of only remembering the good times and forgetting the bad times very quickly. We have a tendency to 'deaden' the emotional impact of negative events relative to the impact of positive events. People are motivated to view their life events in a relatively positive light. Although it's understandable that generally being positive helps us make it through the day, it means that we don't learn lessons from history. You only have to look at banking crashes and wars that we keep fighting over the same piece of land for evidence of this "short term memory syndrome".

What a crisis like a war or a pandemic does is accelerate technology development and changes to social and working practices. During World War Two woman had to work in factories to replace the male workforce who had gone off to fight. After the war, woman continued to work in factories. There was no going back, the genie was out of the bottle. Changes that would have taken a decade for hotels to implement will now have to happen within a couple of years. Hoteliers have no choice if they want to get guests back in their hotels and they need to survive.

Technology - or the lack of it - has been a recurring issue in the hospitality industry for decades. In the past, hotels have chosen to get by and let Online Travel Agencies and review sites take control of the online hospitality world. This is no longer the case as hoteliers fight for survival, they will need to maximise income and reduce costs.

With COVID-19, we've been hearing a great deal about online check-in and mobile keys. The pandemic has made things that were completely normal now seem high risk. There's uncertainty and fear around experiences we previously enjoyed, checking into a hotel, the gym, the pool and the breakfast buffet.

Contactless check-in and mobile key will transform the way hotels operate. It is easy to understand that the already declining traditional ways to book hotel rooms are now doomed. Eventually, digitalization will take over the whole hotel booking market. With a mobile key, in theory you could bypass the front desk and head straight to your room without a wait and without human contact.

Hospitality has traditionally been a people business, but today's guests are concerned about maintaining a social distance. Research conducted by travel technology firm Citron found that 73% of travellers would like an app that allows them to open their hotel room door with their mobile phone. Mobile keys seem like the solution to all our troubles, but the elephant in the room is the cost of implementing these new solutions.

We can now see light at the end of the tunnel and hopefully staycations will mean hotels will be fully booked when they re-open. Hotels have taken a massive financial hit during the pandemic and mobile room entry at its most basic requires replacing existing magnetic card door locks with RFID & BLE enabled locks. Hotels, big or small are unlikely to want to invest unless it's highly unlikely they won't be forced to shut again, and the payoffs are clear. Some lucky hotels had either just upgraded their locks or they are approaching the normal replacement cycle, but for the others it's going to be tricky financing the new technology.

Hoteliers will need to find pragmatic solutions to use existing resources at minimal costs and rethink service procedures while still keeping the spirit of hospitality and comfort that make hotel stays memorable. It won't be easy, but one thing I have experienced during the crisis is how resilient and cheerful hospitality people are when faced with such adversity. I have no doubt they will find a way to adapt and survive.

About the Author
Andrew Evans, Chief Executive Officer, Keystep Solutions Limited

Andrew is the founder and Chief Executive Officer of Keystep Solutions Limited, a specialist solution provider of Electronic Lock Systems to the hotel and leisure sectors. Keystep is a major player within the hospitality industry and has an enviable client list.

Keystep Solutions are now the market leader and innovator in the electronic door locking and access control They supply most of the hoteliers in the UK and beyond.

Meet the HOSPA Learners of the Year for 2020!

In January we brightened up one of the dark, dreary winter days when we celebrated the achievements of our highest scoring learners on the HOSPA programmes in Financial Management and Revenue Management at our Virtual Awards Ceremony.

The online event was attended by over fifty learners, colleagues, HOSPA supporters and family members. Amidst an array of attendees dressed to sparkle with balloons, party hats and drinks in hand, the Awards were presented by Debra Adams, Head of HOSPA Programmes and Harry Murray MBE, President of HOSPA to a total of 12 recipients.

We continue to spread the joy this month by sharing with you the profiles of our two students who were presented with the highest Awards for achieving the status – 'Learner of the Year' in Financial Management and in Revenue Management.

Lucy Cole – Learner of the Year in Financial Management.

Lucy, who is currently a Research Analyst at BDO LLP achieved the highest overall grade for Level One, Financial Management course which she completed in August 2020. On Level 1 Lucy studied bookkeeping and the preparation of the financial statements as well as internal controls for hospitality businesses. She has since gone on to study on Level 2 Operational Financial Management with this Level coming to completion in the last few weeks. Level 2 moves into management accounting with projects based on pricing, costing, budgeting and forecasting for the hospitality industry. The next step is Level 3 – Strategic Management Accounting focusing on capital investment appraisal, working capital management and performance measurement. Lucy tells us about her journey to date:

"My travel-corridor into the hospitality industry began with a degree in Modern Languages and Cultures from Durham University. As part of my year abroad in France and Italy, I spent one extremely warm summer as a hotel administrator in Siena; this provided a strong foundation for understanding both the workings of a hotel and the importance of air conditioning.

Almost immediately after graduating, I joined a cultural tour company based in London as an Operations Executive, specialising in wine tours. My role comprised originating and executing all components of luxury group tours, including full budgetary control and analysis of profit margins. During my three years at this small firm, I gained excellent exposure to the running of a tour operator from top to bottom and saw the direct impact of financial and commercial decisions on a business, some of which were my own.

In January 2019, I moved to my current position as Research Analyst in the BDO Leisure and Hospitality Consulting department. BDO, as long-standing and proud sponsors of HOSPA, encouraged me to study for the Financial Management qualification shortly after my arrival at the firm. Given my limited technical experience in finance at the time, I knew the course would be demanding; that said, I was keen to take on this new challenge and confident that the qualification would complement and strengthen my role at BDO.

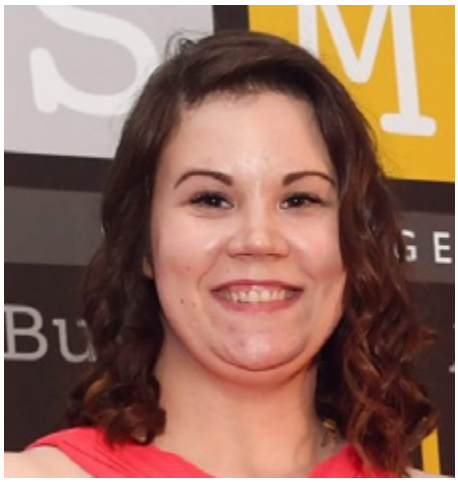
I'm pleased to report that the course has lived up to expectations. It has taught me the rigorous technicalities of financial accounting, alongside the strategic processes and essentiality of operational control. This all being set within the context of the hospitality industry has really helped to deepen my understanding of the sector.

As a corollary, this has been hugely valuable for my work and network at BDO – and I don't just mean the accounting jokes to use at audit staff parties (…in 2024). I feel fortunate to have been able to increase my knowledge of the industry during this turbulent and critical period in particular, as I support the Partners and Consultants in advisory work, and

as author of our monthly analytical reports of UK hotel performance. This HOSPA course has allowed me to fully comprehend the real impact of the pandemic on hotel finances and operations - whether it be supply chains, workforce, marketing or sales - and the need for flexible and grounded business models as a result.

I look forward to using this HOSPA qualification as a vital cornerstone of my career at BDO. But more importantly, and as part of the talented team at BDO, I expect to use it to help our hospitality clients to overcome the challenges of the current economic climate, and to reach a more certain future."

We wish Lucy well for her future studies and career opportunities ahead!



Krista Kortelainen – Learner of the Year in Revenue Management

Krista, who is currently Head of Revenue & Reservations at The Citystay Group achieved the highest overall grade for both Level Two Operational Revenue Management and Level Three Strategic Revenue Management of the HOSPA Revenue Management course studied part time online over a period of five months per course. Each course requires participants to study revenue management theories and apply them to case problems in their own business culminating in an applied project for Level 3. Krista shares with us her journey to date:

"During my bachelor's degree, I undertook an internship as a receptionist at an airport hotel in my native Finland. Off the back of this internship, I was offered a part-time role as a receptionist. Over time, my role developed into a full-time position and covered many more aspects of the hotel and hospitality machine. This ranged from hosting meetings to being a sales executive for meetings and events through to beginning management training.

It was during this period that I discovered my enjoyment for the fast-paced nature of hospitality and the variety of the roles and responsibilities I undertook ensured that no two days were the same. Once I had had my eyes opened to this, I realised that there was a lot of career opportunities for myself in an industry I seemed to thrive in.

After moving to the UK in 2014, I furthered my experience within the hospitality industry working as a Front of House Manager in a hotel as well as working in the customer service department of a world-leading OTA. Alongside my professional development, I completed my MSc in Project Management at Royal Holloway, University of London.

In 2018 I joined Citystay, a Cambridge based serviced apartment provider as the Reservations & Guest Services Manager. Moving into the burgeoning and fast-growing extended stay industry was an exciting step in my career and it felt as though Citystay was the ideal next step in both my personal and professional development.

As part of the development of Citystay, the company determined to add another long stay brand, Checked Inn, and a long stay agency, InnClusive as standalone brands to form the overarching Citystay Group. In the embryonic years of the Citystay Group, it was recognised that within the internal structure, and to be as successful as possible, the group would need to have a full functioning Revenue Management department.

I was therefore enrolled into the HOSPA Revenue Management course to provide a platform to learn the theory and practical application to develop into the role of a Citystay Group Revenue Manager.

Upon the official launch of the Citystay Group in December 2020, I was promoted to the role of Head of Revenue & Reservations for the group.

As I have always had a thirst for learning, I recognised the area of Revenue Management as being something I was not only interested in, but something that would benefit both myself professionally and the future of the Citystay Group tremendously. The HOSPA Revenue Management course might be directed more towards hotel revenue managers, however I feel strongly that it is also extremely relevant to Serviced Accommodation revenue managers. This course gives us a competitive advantage by having the knowledge and ability to apply the most appropriate Revenue Management tools and activities into our business.

Having completed the course, I feel I am now equipped with an arsenal of theoretical knowledge and practical skills to enable me to excel in my new role.

My hopes for the immediate future are to begin putting my learned skills into action for the benefit of the Citystay Group. I intend to continue and deepen my learning on the subject to become an industry leader within the extended stay industry.

Away from my day-to-day career, I have always had a passion of horses and alongside my professional career as Head of Revenue, I would love to have my own stables at home."

We are currently keeping enrolments open until the end of March for the next intake to our courses. Our course tutors are ready to welcome applicants to the current online courses with a timetable for coursework submissions and tutor support to keep you on track - contact us today for more details at education@hospa.org or visit www.hospa.org/professionaldevelopment The cost per course is £820 + VAT with discounts and instalment schemes for payment available.

CEOs look to Budget for VAT cut extension

CEOs in the hospitality sector, including the bosses at Burger King, Pizza Express and Fuller, Smith & Turner, have written to Chancellor Rishi Sunak to ask him to extend the VAT cut by another year, as well as reducing VAT for on-premise alcohol sales, leisure activities and weddings in the Budget.

Over 160 CEOs from the UK's leading hospitality businesses, employing hundreds of thousands of people, have written to the Chancellor ahead of next month's Budget. They called for decisive support to help the sector survive, rebuild and drive the economic recovery of the country as it emerges from the COVID crisis.

The letter, co-ordinated by trade body UKHospitality, highlighted two key areas of Government support that, the sector said, must be delivered for it to play a key role in rebuilding the economy, and to help drive investment and provide jobs. These were:

- An extension of the 5% rate of VAT for hospitality for another year, expanded to the wider sector
- The continuation of the business rates holiday for hospitality for the whole of 2021/22 giving businesses valuable breathing room to rebuild and address rent debt.

Additionally, the letter called on the government to provide a decisive package of fundamental support, including extension of the furlough scheme, improved loan repayment terms to increase liquidity, deferral of government-owed debt and replacement of the Job Retention Bonus.

UKHospitality CEO Kate Nicholls said: "Despite the carnage of the past 12 months, hospitality businesses are ready to pick up the pieces of a battered economy and help spearhead our economic revival. Although the end of the health crisis is not quite here, there are positive signs that we are making real progress in the battle against COVID. We are hopeful that, in the coming weeks and months, we can begin to welcome customers back and we know that people will be eager to socialise with their friends and families safely in our venues.

"That means we need to start laying the groundwork now. We need to make sure that the hospitality sector is in the best possible position to help rebuild as we done in the past. After the 2008 financial crisis, one in six new jobs created in the UK were in hospitality. If the Government backs our sector and gives us the support we need and deserve, we can play a key role in helping it achieve its aims of levelling-up people and communities across the country.

"Extending and expanding the cut in VAT will play a crucial role in boosting demand and customer confidence. Our sector is labour-intensive so this will instantly result in more jobs. Removing business rates will allow businesses to repair shattered balance sheets, including tackling the rent mountain that has now hit £2 billion.

Despite the carnage of the past 12 months, hospitality businesses are ready to pick up the pieces of a battered economy and help spearhead our economic revival. Although the end of the health crisis is not quite here, there are positive signs that we are making real progress in the battle against COVID.

"Lots of businesses have taken a beating and many are still only just clinging on. The support that the government has provided in the past year has been crucial in keeping businesses alive, giving them breathing room and allowing them to keep jobs safe. That support must continue if we want to see as many businesses and jobs secure as possible, and hospitality play the key role we know it can play in rebuilding. There is no point in the government undoing all the good work it has done in 2020 by pulling the rug from under us as we get back on our feet."

The letter concluded: "In the aftermath of the financial crisis of 2008, it was businesses like ours in the hospitality sector that generated growth and offered employment to many, particularly those in deprived areas. We can do so again with a presence in towns and cities and rural and seaside communities right across the country. Thank you for your support to date and we look forward to working with you to champion the nation's recovery in the months and years ahead."

According to figures published by the Office for National Statistics:

- In Quarter 2 2020 overseas residents made 96% fewer visits and spent 97% less than in Quarter 2 2019
- Domestic and international air passenger traffic fell to less than 2% of its February 2020 levels in April 2020
- Accommodation and travel agency businesses saw the sharpest decline in turnover during the first national

lockdown, falling to 9.3% of their February levels in May 2020
- In the three months to June 2020, employment in accommodation for visitors fell by 21.5% compared with the same three months of 2019
- In travel and tourism industries overall, the number of people aged 16 to 24 years saw the largest fall in employment of any age group between Quarter 3 (July to Sept) 2019 and Quarter 3 2020.

Nicholls said: "The sudden and colossal drop-off in the number of inbound tourists recorded last year makes for shocking reading for the hospitality sector. As the figures show, 2020 saw a key economic sector take a huge financial hit and the result was job losses, particularly for younger workers.

"People's reticence to travel last year was understandable, but the figures still make for frightening reading. Hospitality relies in large part on inbound tourism, and a healthy travel and tourism sector is going to be key for the survival of our sector in the months and years ahead. For hotels, leisure parks and visitor attractions it will be particularly critical.

"We appreciate that these figures are not going to return to pre-pandemic levels overnight, but we hope that everything will be done to encourage tourism in the UK, first domestically and then internationally, as soon as it is safe to do so. Key to this will be an extension of the VAT cut for hospitality businesses. If this is maintained and expanded to the wider hospitality sector, it can play a key role in stimulating demand and getting these numbers back up to where we need them to be. If this accompanied by an extension of the business rates holiday, then all the better for businesses' chances.

"A healthy tourism sector means that we can play a bigger role in the economic recovery of the country and we can begin to refill these vacancies. As the worldwide vaccine rollout continues apace, we need to send the message that we are open for business."

The group was not the only one to look for support from Sunak. The so-called B5 group - made up of the Confederation of British Industry, Make UK, the Institute of Directors, the British Chambers of Commerce and the Federation of Small Businesses - also came forward with a wish list.

These included a number of proposals around the furlough scheme, which currently runs through April. The CBI proposed an extension to the end of June, with targeted support thereafter for the worst-affected businesses, such as those in hospitality. The BCC said it should run through July. Make UK proposed a September cutoff, followed by a job retention bonus for companies which keep workers on. The IoD proposed a gradual taper.

Make UK and the IoD also wanted improvements to want digital infrastructure to be a government priority, and emphasised the importance of spending on local roads and rail links.

Tony Danker, CBI Director-General, said: "The Budget comes at a crucial time for the UK. The government's support from the very start of this crisis has protected many jobs and livelihoods, and progress on the vaccine rollout brings real cause for optimism.

"But almost a year of disrupted demand and extensive restrictions to company operations is taking its toll. Staff morale has taken a hit. And business resilience has hit a sobering new low.

"The government must once again stand shoulder-to-shoulder with businesses to underwrite support for the duration, helping viable enterprises to last the course.

"Many tough decisions for business owners on jobs, or even whether to carry on, will be made in the next few weeks. If the government plans to continue its support then I urge them to take action before the Budget which is still more than six weeks away.

"The government has done so much to support UK business through this crisis, we don't want to let slip all the hard work from 2020 with hope on the horizon.

"The rule of thumb must be that business support remains in parallel to restrictions and that those measures do not come to a sudden stop, but tail off over time. Just as the lifting of restrictions will be gradual, so must changes to the government's sterling support to businesses."

Sunak has commented frequently about the importance of balancing the books and not running up too much debt. The time for such prudence, when businesses are staring into the abyss, is not now. Think of what you can do, and what the sector than then do for your tax take in the future, Mr Sunak.

Leaders see cautious optimism

CGA's annual Business Leaders' Survey sets the tone for prospects and trends in hospitality, and CGA's experts unveiled 2021's key findings at a special webinar.

Here are ten top messages from the exclusive poll of our industry's most influential and knowledgeable players.

1. Optimism is cautiously rising...

After nearly 12 months of very fragile business confidence, signs of an end to lockdowns have lifted leaders' optimism. Half (49%) are now confident about prospects for the sector over the next 12 months—more than triple the number who felt the same way in November (18%). The number feeling confident about their own businesses has doubled, from 35% to 54%.

This is reflected in the Business Leaders' Survey, with 98% of respondents agreeing pent-up demand will help their businesses in the next 12 months, but nearly three quarters (71%) expecting fragile confidence to hold back sales. CGA's research and insight director Charlie Mitchell said trends after last year's spring lockdown, which saw well over half of consumers return to venues within a month of reopening should provide encouragement.

2. ...But many challenges remain

One in 10 (10%) leaders think their business will not survive if no additional support is announced in the Chancellor's Budget—and only a third (37%) predict they will return to profit this year without fresh help. "We've seen a reasonable uptick in confidence... but we're very much still at a cliff edge," said Karl Chessell, CGA's business unit director – hospitality operators and food, EMEA.

3. More help is needed on rates and VAT

Business leaders' clear priorities for government are extensions to a couple of key packages: the pause on business rates and cut in VAT. Prolonging these until March 2022 would help two thirds (66%) of businesses to return to profitability this year, the survey suggests. Extending the furloughing scheme, increasing grants and cutting VAT and duty on alcoholic drinks would all stimulate trade too.

There's a real need for the government to step up and give support," said Karl Chessell.

4. We can expect openings as well as closures

CGA's Market Recovery Monitor tracked nearly 6,000 closures of licensed premises in 2020, and many more can be expected before hospitality reopens. But the number of leaders planning to keep some sites shut after lockdown has dropped from 36% in November to 31% in CGA's latest survey. Three in five (58%) leaders now anticipate opening new sites in 2021—more than double the number in the third quarter of 2020 (26%)—and half (49%) expect new entrants to match or exceed levels seen in 2019. They indicate a revival in both growth and entrepreneurialism as 2021 goes on. "After a lean year we'll hopefully see new investment," said Karl Chessell.

5. Consumers are excited but cautious

CGA's consumer research shows a tension between excitement at returning to hospitality after so long away, but lingering anxiety about safety. This is reflected in the Business Leaders' Survey, with 98% of respondents agreeing pent-up demand will help their businesses in the next 12 months, but nearly three quarters (71%) expecting fragile confidence to hold back sales. CGA's research and insight director Charlie Mitchell said trends after last year's spring lockdown, which saw well over half of consumers return to venues within a month of reopening should provide encouragement. "The really positive thing is that when consumers visited they felt confident enough to go again. There's a job to be done to build confidence and overcome the nervousness that's apparent."

6. Spending may polarise

CGA's Business Leaders' Survey and consumer research both point to potential polarisation in the market after lockdown. Just over half (56%) of leaders expect increased demand for high-end offerings will have a positive impact on their business—but nearly as many (49%) think the same about value offerings.

There will be a set of consumers who have managed to save and will be looking forward to coming back out and treating themselves… but on the other hand there will be a lot who have been impacted negatively financially. For operators, the key takeout is knowing your audience and tailoring your offer accordingly."

7. Staff engagement is still crucial

With so many job losses lately, access to labour will not be as challenging as it was before the pandemic. But with only 14% of leaders not anticipating recruiting any new staff in 2021, competition for talent could increase as the market recovers, which will make good staff engagement as vital as ever. CGA's Hospitality Professionals research shows a clear link between engagement and the satisfaction of staff, so investing in it now could avoid labour shortages in the future.

8. Technology is now at the core of hospitality

The pandemic has dramatically accelerated hospitality's adoption of technology, and 95% of leaders think it will be important in their operations after lockdown. The Business Leaders' Survey shows businesses have grown much more confident with digital solutions over the last year, with frustrations around integration and data overload down.

2020 was a year of rapid adoption—a lot of it driven by necessity," said Charlie Mitchell. "It's really given operators the chance to see where they can make efficiencies," agreed Max Tucker, director of analytics, EMEA at Fourth at the webinar.

9. Tech can support planning in a volatile market

Given the unpredictability of footfall after lockdown, technology will be particularly crucial in managing staff costs. "Tech has a big part to play in understanding the new trading environment… it'll be about getting labour scheduling right and not impacting on customer satisfaction because you don't have enough staff," said Max Tucker. With many consumers likely to be planning their hospitality visits carefully, smart use of online booking tools will be important too.

10. Hospitality can power the UK's recovery

CGA's Business Leaders' Survey shows widespread confidence that hospitality can boost the economy, create jobs and support communities in the aftermath of damaging lockdowns—which makes not being able to reopen before mid-April disappointing. "The delay is a huge frustration.. the sector has a big role to play in the country's recovery," said Karl Chessell.

Travel bans hit UK GDP

The ongoing restrictions to travel and blanket quarantines has seen the UK suffer greater GDP losses than many of its European counterparts which have less stringent barriers in place, according to the World Travel & Tourism Council.

According to data from Oxford Economics, the UK is facing a GDP loss of 10% in 2020, while Germany, which imposed fewer damaging and what the WTTC described as unnecessary travel barriers while being quicker to implement widespread testing, will experience a loss of just 5.3%.

The data suggests that the latest UK government policy to introduce a new triple test regime, and 10-day quarantine for all UK arrivals, could cause even greater damage to the UK economy.

WTTC says the restrictions to travel and mobility have been a significant factor in causing the UK's economy to be hit twice as hard as many of its European neighbours.

Research by WTTC shows that while the UK has been constantly changing its policies and restrictions, countries like Germany were more consistent with policies; quicker to implement a massive testing programme, which saw it isolate and control cases much earlier than the UK and enabled mobility.

Furthermore, the UK imposed quarantine restrictions on people travelling from key countries such as France, Spain, Greece, and others, whilst Germany kept borders open to EU member states since the beginning of summer.

WTTC's 2020 Economic Impact Report showed that in 2019, international spending represented 17% of all traveller spend in the UK and 14% in Germany, with Travel & Tourism contributing around 9% to the GDP of both economies.

WTTC says these ongoing, disruptive, and costly measures are having a significant economic impact.

But while the world continues its fight against COVID-19, WTTC is concerned that countries like the UK, which have imposed harmful blanket quarantines, are suffering even greater losses.

Gloria Guevara, WTTC President & CEO, said: "WTTC welcomes the mass testing of all inbound travellers to the UK. But we are concerned the UK could face a steeper climb back to full economic health unless a clear exit strategy is in place to restore international mobility.

"We have been calling on the UK government to introduce a comprehensive, fast and cost-effective test on departure and arrival scheme for many months, which would avoid the risk of further transmission while enabling mobility.

"We believe the impact of constantly shifting policies on testing, quarantines and the placing of countries in so-called high-risk 'red zones', will jeopardise the return of a sector which contributes nearly £200 billion annually to the UK economy.

"This research suggests that countries which have imposed harmful blanket quarantines will suffer greater GDP loss, and this is certainly the case when we compare the UK to Germany.

"We must applaud the incredible progress made by the UK government on the rollout of vaccines across the country, which could see it surpass its target of inoculating a staggering 15 million people.

"However, the UK Travel & Tourism sector is in a fight for survival and without a clear exit strategy to these restrictions, the economic damage will continue to be significant and the sector could face complete collapse."

While the UK has doubled down on unnecessary quarantines, other countries, such as Germany, have broadly followed the European Centre for Disease Prevention and Control EU Commission guidelines, and only imposed limited and targeted quarantines on travellers coming from regions and countries within Europe, where the cases per 100,000 were above a certain level.

WTTC fears if the UK government continues with its current strategy, it will fall further behind the rest of Europe, as countries scramble to regain their economic foothold and recover from the damaging effects of the pandemic.

Sector welcomes grants

The sector has welcomed a new package of grant support that Government has confirmed ahead of the Budget. The measure will see grants of up to £18,000 per hospitality premises to facilitate the sector's restart this summer.

An additional £425m has also been added to the Additional Restrictions Grant (ARG) fund to help those not receiving the grants.

The Chancellor Rishi Sunak announced one-off top up grants for retail, hospitality and leisure businesses worth up to £9,000 per property to help businesses through to the Spring

Sunak said: "The new strain of the virus presents us all with a huge challenge - and whilst the vaccine is being rolled out, we have needed to tighten restrictions further.

"Throughout the pandemic we've taken swift action to protect lives and livelihoods and today we're announcing a further cash injection to support businesses and jobs until the Spring.

"This will help businesses to get through the months ahead – and crucially it will help sustain jobs, so workers can be ready to return when they are able to reopen."

Craig Beaumont, chief of external affairs at the Federation of Small Businesses, said the "significant cash injection", would "help thousands of businesses survive through these final restrictions, and then help drive the vaccine-enabled recovery".

UKHospitality has highlighted the urgent need for the grants to reach all hospitality businesses as quickly as possible. Previous grants have been delayed by bureaucratic processes and businesses reported that only 37% of grants announced in January had been paid out a month later. This is far too long for businesses struggling to survive.

Kate Nicholls, CEO, UKHospitality said: "This announcement is great news for hospitality businesses that have been struggling to see how they could survive through to the Prime Minister's reopening dates. Cash reserves have been severely depleted after a year of closure and restrictions and these grants are a very welcome boost, putting the sector in a better place to restart.

"It is absolutely critical that the grant funding is put into the hands of hospitality business owners as quickly as possible. Businesses are crying out for the cash now so there can be no further delays which might make it too late for some.

"The Government must also clarify once and for all that these grants are not subject to EU State Aid rules and that grants can flow to all businesses that so desperately need them.

"While this is a positive step it needs to be part of a wider package at the Budget that includes an extension to the 5% VAT rate for a full year and a business rates holiday through 2021/22. Without these measures, and full furlough while we re-open, the hospitality sector's recovery will be stunted along with our ability to start tackling unemployment by creating jobs."

The grants will be allocated based on the value of a property:

- For properties with a rateable value of £15,000 or under: £8,000
- For properties with a rateable value between £15,000 and £51,000: £12,000
- For properties with a rateable value of £51,000 or over: £18,000

Preparing for reopening

At the time of writing, the staged reopening plans across the UK & Ireland were still not public. Despite this uncertainty, that's not to say the only strategy to employ right now is the waiting game.

Using Amadeus' flight and forward-looking Demand360® data, we share what booking patterns we're seeing currently. Using this data makes it easier to prepare for reopening – hopefully for the final time – and create strategies based on real-time information.

Pay attention to how and where bookings are made

In order to understand how bookings are being made, first look at where they are coming from. Let's start at the search phase. Amadeus partners with Google to track this behaviour, and data as of the 13th February, confirms that the majority of searches are made within the UK. Moving onto booking behaviour, our data shows that Online Travel Agencies, direct bookings and Brand.com are the most popular channels currently in the U.K.

Ireland demonstrates similar behaviour, but with Direct bookings taking the top spot. As a hotelier, this data provides important insight when it comes to creating or adjusting marketing and revenue strategies. This spread in booking behaviour shows the importance of displaying your properties across a mix of channels, in order to maximise visibility and booking potential. It's also key to maintain rate parity, to avoid travellers choosing one channel or another due to price. If you're looking to drive more bookings direct, consider building promotions that go beyond price, such as offers for longer stays, free breakfast or room upgrades. For more advice on this, download our complimentary Direct Bookings Playbook.

Secondly, with search trends indicating an interest in domestic bookings, focus your advertising spend during reopening within the UK & Ireland. As restrictions ease, keep an eye on how this trend changes to look at widening your reach across other countries.

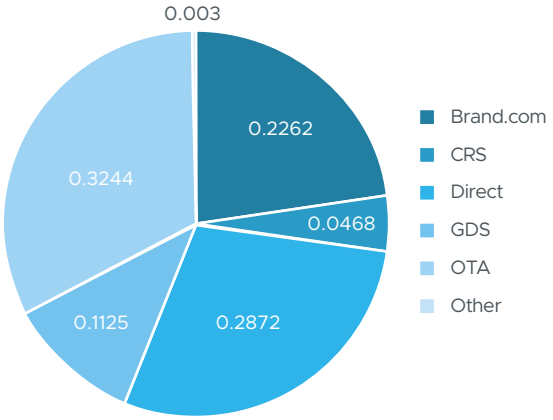
Use lead times to adjust promotions

As you begin to plan for reopening, booking lead times will provide important insight into building promotions and adjusting operations, based on demand. Remember, our data is not predictive, but instead shows forward-looking on-the-books data that have been reserved. In the earlier months of the pandemic, lead times on bookings reduced dramatically globally, with the majority of bookings made within 0-7 days. Today, this trend remains for the UK with 59% of bookings currently being made with this timeframe. This is a clear increase on last year. However, almost a quarter of bookings are also being made over three months in advance. In Ireland, this trend is even more prevalent, with 44% of bookings made over 90 days in advance – double that of last year. It's likely that last minute bookings currently are a result of quarantine or essential travel, however those bookings further out are an indication of traveller demand and optimism. Take advantage of this to build promotions that span the coming months, maintaining flexible cancellation where possible. As we get closer to reopening dates, keep an eye on how lead times progress to understand whether you should adjust your promotions to include ones such as last-minute offers.

Looking ahead to Summer...

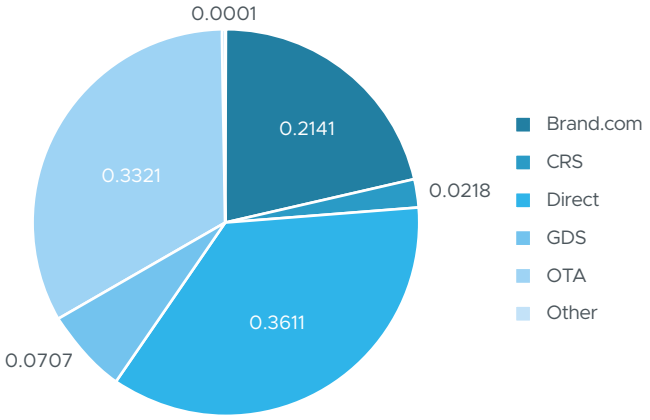
Preparing for reopening requires thinking of where travellers might be headed. We've taken a look at what occupancy looks like for the months of July and August. As many of us remain cautious, occupancy still remains low for most places. Locations such as Carlisle,

UK - Current Year Booking Channel Mix



Amadeus' Demand360® data as of Feb 10, 2021

Ireland - Current Year Booking Channel Mix



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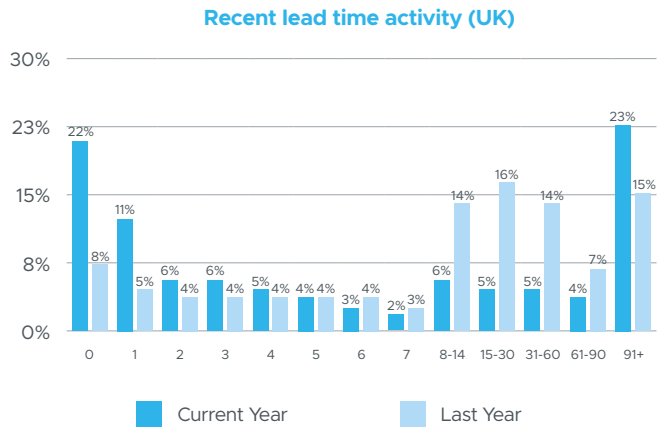

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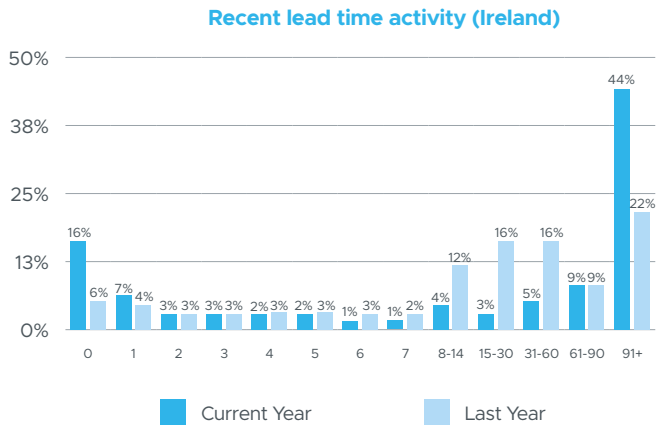

Amadeus' Demand360® data as of Feb 10, 2021

Dundee, Oxford and Plymouth all show occupancy levels of at least 20%. This contrasts to bigger cities such as London or Birmingham with single-digit occupancy during this time. In Ireland, Galway and Sligo come out top with occupancy of between 20- and 40% throughout the summer months. This unsurprisingly verifies that, once possible, travellers are looking for a break from city life, opting for country or sea air. If you have destinations in these locations, keep in mind that competition will be strong. Avoid focusing on lower prices, and instead look at other ways to make your property stand out from the crowd – what are your property's selling points? What packages might appeal to your target audience? If you're not in these locations, remember that everyone is ready for a break from the lockdown routine. Emotions will play an important role in attracting demand, so think of promotions that will appeal to this.

Learning, earning, market observing

Krista Kortelainen, Reservations, & Guest Services Manager, Citystay, was one of HOSPA's Overall Learners of the Year last year. Here she talks about how she's applied her learning to the business during the pandemic.

COVID-19 has hit the hospitality industry in an unforeseen way and brought the whole industry to its knees. Now that the third lockdown in the UK is starting to wind down, COVID-19 cases seem to be dropping and the vaccinations are being rolled out, this gives hope of normalcy and people are planning their first trips away after the pandemic. Predictions strongly suggest that domestic leisure travel, or so called 'staycations', will be the trend in travel this year, which means that accommodation providers who have previously relied heavily on corporate travel will have to reinvent themselves to cater to the domestic leisure segment.

This has certainly been the case for a Cambridge-based serviced accommodation provider Citystay, whose business has mainly consisted of corporate travel pre-pandemic. Completing HOSPA's Revenue Management Course during the pandemic gave an opportunity to research and plan for the recovery of Citystay post-COVID-19 by creating a Revenue Management strategy targeted towards the domestic leisure segment. As all good strategies, this project started by identifying the pitfalls in the current strategy to determine the recommended plan of action.

The issues identified to affect the optimisation of revenue from the domestic leisure segment and overall recovery post-COVID-19 included the use of very restrictive booking window rules and cancellation policies, the lack of diverse inventory control strategy and a lack of competitor pricing data.

Furthermore, the domestic leisure segment provides an opportunity to maximise incremental revenue that will further assist with the post-COVID-19 recovery. As a mainly corporate based business, Citystay's culture had always been less reliant on the leisure segment. This segment has been considered 'filler' business rather than a significant revenue opportunity, and hence, the need to shift this type of thinking in the business is paramount to succeed in attracting the leisure traveller.

The first part of the plan of action included restructuring the Best Available Rates to make it more attractive for the leisure segment with allowing longer booking windows, in addition to making the rates more manageable internally. The restructuring also included adding more flexible cancellation policies with premium rates, whilst still offering lower rates for non-refundable options to cater to customers from different risk categories.

In addition, practices for effective competitor monitoring will need to be put in place in the post-COVID-19 environment to stay competitive. The easiest solution for this could be in acquiring Revenue Management Software, however, independent brands trying to recover from a very difficult year might not have the resources to do this right away. Therefore, using existing resources, such as competitor monitoring tools from OTA's like Expedia and Booking.com, is a great way to get started and to monitor the post-COVID-19 market. Knowing one's product and the value of it is very important, not only to avoid getting into price war with the competition, but also gaining the maximum revenue whilst increasing RevPAR gradually towards the pre-pandemic levels.

The Staycationers who would normally travel abroad for their holidays will be looking to travel domestically in 2021 and gain experiences rather than just booking accommodation. Keeping this is mind, providing added value by selling accommodation packages offering theses experiences will be more attractive for the travellers than simply offering discounted rates on basic accommodation. Indeed, by doing this the accommodation providers will be able to increase revenue and RevPAR more easily on the road to recovery. Moreover, there is an opportunity to upsell additional services to the leisure segment to gain incremental revenue to further assist with recovery.

COVID-19 has been the perfect opportunity to critically look at Citystay as a business and develop the overall strategy to be more agile and diverse. This has resulted in the development of Citystay Group that consists of four companies diversifying the service offering; Citystay, Checked Inn, InnClusive and Cambridge Clean Sheets. Citystay offers luxury serviced apartments exclusively in Cambridge with a portfolio of 16 locations and 113 apartments.. Checked Inn is a turnkey accommodation solution in the heart of Cambridge from just 12 weeks onwards. InnClusive, the newest addition to the Citystay Group also offers turnkey accommodation from 4 weeks onwards with locations all-over the UK. Cambridge Clean Sheets is a professional laundry service catering to both domestic and commercial clients. By diversifying the service offering during the pandemic the Citystay Group has been able to not only survive, but thrive under the current circumstances.

Delivery thrives again in lockdown

Food delivery has become habitual for consumers in Britain's latest lockdown, while rising take-up of cook-at-home meal kits has given restaurants a welcome new sideline.

Those are some of the insights from CGA's '2021 Hospitality Consumer Forecast', which explores crucial changes in people's behaviour and attitudes ahead of the sector's reopening.

The research shows that more than a quarter (27%) of consumers ordered hot food delivery over the festive period, while nearly one in five (18%) took advantage of drive-thru facilities and one in ten (10%) ordered pick-up or click-and-collect. Among those receiving deliveries, nearly half (44%) said they were doing so more frequently than they had in previous festive seasons.

Consumers' appetite for delivery peaked on Christmas Eve, the research shows, with New Year's Day and Christmas Day just behind. Orders were driven by a desire for treats and relaxation, which were cited as motivations for 36% and 27% of consumers. One in five (18%) said they were seeking to replace their typical meals out—another sign that consumers are missing their favourite restaurants, pubs and bars.

While still a relatively small part of the market, restaurants' meal kits have also become a welcome alternative for people missing eating out, with one in 20 (5%) consumers buying one over the festive period.

Deliveries and kits have been boosted by the closure of hospitality, but there are signs that consumers' new habits will last well beyond lockdown. Seven in ten (69%) of those who ordered deliveries or collections over the festive period say they will continue to do so throughout 2021.

CGA's '2021 Hospitality Consumer Forecast' sets out the factors behind consumers' delivery choices, and emphasises the importance of quality, value and trust. It also reveals the demographics of regular buyers, who tend to be younger and more affluent than the average consumer, and more likely to live in city centres where access to deliveries is easier.

The wave of lockdowns over the last year has engrained delivery into the everyday habits of consumers," says Rachel Weller, head of consumer research at CGA. "As the market has grown, space has also emerged for innovations like meal kits, and further evolution will undoubtedly follow, even after venues can welcome people back inside.

"Operators and suppliers will have to stay closely tuned to changing habits and be ready to pivot to give consumers what they want as the market moves towards its next phase of recovery".

While still a relatively small part of the market, restaurants' meal kits have also become a welcome alternative for people missing eating out, with one in 20 (5%) consumers buying one over the festive period.

Coronavirus Job Retention Scheme Claims: Common pitfalls

Due to the complexity in the calculations required for variable paid employees, some hotel operators may have missed the required steps under HMRC guidance or Treasury Direction to calculate reference pay. The result of this means they may have under claimed from HMRC and underpaid employees grant money.

This has significant implications, with the whole grant in relation to that employee for the period of underpayment being repayable to HMRC unless the employer makes good the underpayment to the employee in a reasonable time period.

In many cases the employer will now be out of time to collect the extra grant from HMRC resulting in mounting costs. In this article we'll discuss how to check your claims are correct.

The Coronavirus Job Retention Scheme (CJRS) brings in three new concepts, all of which are utilised in determining the amount that can be claimed. These concepts are:

- Furloughed workers/employees;
- Regular wage or salary/reference pay (based on set HMRC calculations); and
- For flexi furloughed employees: Usual hours (based on set HMRC calculations) less worked hours are furloughed hours.

Employers who claimed based on the initial guidance back in March 2020 may have worked out their own version of how calculations should be done. This may have been done for variable paid employees (engaged before 19 March 2020) where the 2019/20 average is required, as the initial guidance was less than clear. Those employers may not have revised their calculations each month and spotted changes or the expansion of the HMRC guidance, making it clear over the following months how HMRC thought the calculations should be done.

Since the introduction of the penalty legislation, many employers have started to review claims. If you've made mistakes or you haven't reviewed your previous claims, we recommend acting as soon as possible. Where mistakes have been made, consider what action needs to be taken to rectify the mistakes.

In order to tackle claims review, the differing versions of the CJRS need to be explored. There are three versions of the scheme to consider:

1. V1: CJRS original fully furloughed scheme, 1 March 2020 to 30 June 2020.
2. V2: CJRS flexible scheme, 1 July to 31 October 2020.
3. V3: CJRSE flexible scheme, 1 November 2020 – 30 April 2021.

Let's look at the differences between these versions.

CJRS V1: 1 March to 30 June 2020

Full furlough required for a minimum 21 consecutive days. The maximum grant reclaim value is 80 per cent of a furloughed employee's wages (calculated using the new concept of reference salary, which is defined as to which components are included) up to a cap of £2,500 per person per month plus employer National Insurance (ER NICS) and employer's auto enrolment minimum pension contributions on that reference salary at 3 per cent.

CJRS V2: 1 July to 31 October 2020

Flexi-furlough as well as full furlough allowed and only provided an employee was eligible/claimed for under v1, subject to maximum number of employees in a claim. This version of the scheme changed from July to October as follows:

- 1 July to 31 July: as above but only for furloughed hours.
- 1 August to 31 August: the maximum grant for furloughed hours is 80 per cent of a furloughed employee's wages (the reference salary, which is defined as to components included) up to a cap of £2,500 per person per month.
- 1 September 2020 to 30 September 2020: the taxpayer contributed 70 per cent and the employer 10 per cent of furloughed employees' wages during furlough periods; and
- 1 to 31 October 2020: the taxpayer contribution was 60 per cent and the employer contribution was 20 per cent.
- The employer was required in August, September and October to continue to contribute employer's National Insurance and employer's pension contributions.

CJRSE V3: 1 November to 30 April 2021

Flexi-furlough allowed, and employees can be claimed for if not previously claimed under V1 and V2.

The maximum grant reclaim value is 80 per cent of a furloughed employee's wages (the reference salary, which is defined as to components included) up to a cap of £2,500 per person per month.

What should you be doing?

If you receive a letter from HMRC requesting a reply by a set date, take it seriously, review your claims and reply to HMRC. Don't forget that if you are large enough and covered by the Senior Accountancy Officer regime, this does apply to CJRS grant money received.

Also be aware that HMRC may not be the only interested party, your organisation's claims' auditors are likely to want to make sure the claims are materially correct as well. Reviewing them early with professional advisers will smooth that audit process for you and give comfort to management and its auditors as early as possible.

Errors are often made in three broad categories:

1. An administration error when inputting details of a claim.
2. Calculating the amount of claim due particularly considering the complex rules.
3. Accidentally making a claim in relation to an employee who is not eligible.

What are some common mistakes?

- Use of the incorrect number of days (working days rather than calendar days).
- Staff working for the employer whilst on furlough.
- Not factoring top ups or additional payments, into the NIC element of the calculations, claiming when no NIC is due or not capping based on the furlough grant element when making a claim for employers NIC?
- Claims made for ineligible employees (employee not on the last RTI/payroll before 19 March 2020 or, for claims from 1 July to 30 November 2020) not previously furloughed before 10 June).

- Staff called back from furlough before 21 days yet included in claim(s) under V1 and V2.
- Grant payments not been paid over – to employees, HMRC and the pension scheme.

Also be aware that HMRC may not be the only interested party, your organisation's claims' auditors are likely to want to make sure the claims are materially correct as well. Reviewing them early with professional advisers will smooth that audit process for you and give comfort to management and its auditors as early as possible.

- Underclaims where the reference pay has incorrectly included or excluded elements.
- A lack of understanding of employment contracts and the different components through which an employee is paid meaning that grant pay under CJRS is incorrect.
- Furlough agreements do not clearly identify how pay / benefits will continue during the furlough period. For example, pension, salary sacrifice or net pay benefits under flex schemes.
- A lack of understanding about how to deal with holidays when on furlough.
- Salary sacrifice pension arrangements not correctly applied in relation to pay whilst on furlough and incorrect amounts paid over to the pension scheme.
- Approved training days not being recorded nor working days after 1 July therefore leading to potential employee underpayments as they are entitled to NMW or contractual pay.
- Inadequate documentation of start and end dates of furlough and flexi furloughing being applied.

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Britain's licensed premises closing at more than one an hour

New edition of the Market Recovery Monitor from CGA and AlixPartners records nearly 12,000 closures since December 2019 and a limited benefit from outdoor trading from mid-April.

Nearly 12,000 licensed premises have closed in Britain since December 2019, the new edition of the Market Recovery Monitor from CGA and AlixPartners reveals—an average of around 30 a day and the highest rate on record.

The figures indicate the full toll of COVID-19 and lockdowns on hospitality. While 4,170 new sites have been recorded since December 2019, the loss of 11,894 venues means there have been nearly three closures for every fresh opening—leading to a net loss of 7,724 licensed premises.

The number of permanent closures is expected to rise sharply, as the effects of trading restrictions—including a catastrophic drop in trade over the key month of December—take their toll.

While the sector now has a roadmap to reopening, research for the Monitor suggests that the freedom to trade outside from mid-April will be of limited benefit. Well under half (43.2%) of England's pubs, bars and restaurants have an outdoor area of some kind, and while the number is higher among food pubs (78.4%) and community pubs (71.0%), it is far lower on high streets (25.6%) and among casual dining restaurants (11.4%).

"These numbers set out the full, devastating impact of the pandemic on Britain's licensed premises," said Karl Chessell, CGA's business unit director for hospitality operators and food, EMEA. "The wipeout of Christmas trade was clearly the final blow for many businesses, and the long wait that others now face to open their doors sadly means closures will mount even higher."

The new Market Recovery Monitor from CGA and AlixPartners also reveals that the food-led sector has been hit harder by COVID-19 than the drink-led market, losing 7.6% and 5.5% of total sites respectively. The casual dining sector has contracted by 15.8%—equivalent to more than 1,000 casual dining restaurants, or nearly one in six of the total, shutting their doors since December 2019.

But the report also points to resilience in some areas of the market, including bars and cafes. Many city centres have also proved more durable than expected, with central Sheffield, Liverpool, Edinburgh and Nottingham all losing fewer than 3% of their licensed premises since December 2019, and the London market trimmed by a below-average 6.3%. It provides optimism that major cities may rebound quickly when the hospitality sector is able to trade again.

"There is huge pent-up demand for hospitality among consumers, and it is encouraging to see signs of resilience in the sector," said Karl Chessell. "Pubs have proved more durable than restaurants in recent months, and outside service will give many of them a useful kickstart if the sun shines. Amid all the closures, it's also encouraging to see a steady flow of new entrants to the market. We remain very confident about the long-term future of the sector, but unfortunately there is more pain to come first."

> There is huge pent-up demand for hospitality among consumers, and it is encouraging to see signs of resilience in the sector.

AlixPartners' managing director Graeme Smith said: "While the Prime Minister says the country is on a one-way road to freedom, the hospitality sector still faces months of subjugation. Businesses have spent almost an entire year closed or operating under the most severe restrictions, and the Government's roadmap to reopening does very little to ease their pain in the near-term. While permitting businesses to trade outdoors from mid-April will clearly benefit some segments of the market, a significant proportion of operators, even some of those with outdoor space, will not find it a viable option. For many businesses, it will not be until mid-June, when restrictions are more fully lifted, that they will be able to trade on a profitable basis.

"The rapid acceleration in site closures since the start of the year demonstrates just how brutal the situation is. Businesses are burning through cash at an alarming rate as costs stack up, and within the sector there is despair as to why hospitality is at the back of the queue when it comes to reopening. The Budget is absolutely crucial to the future survival of thousands of sector businesses; a substantial package of financial support is needed to prevent greater numbers of closures across this year and beyond."

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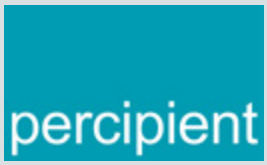

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