THE OVERVIEW

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A la mode - modular hotels

Planting the flag - vegan food
Charging more PPL - music tariffs grow

Welcome to THE OVERVIEW

Ours is a sector where having too much of a good thing can come with more than a little risk. Anyone in foodservice will tell you that even just thinking about offering a deep-fried Mars bar with clotted cream is enough to bring with it threats of calorie counts on menus. And purveyors of booze are currently being haunted by the idea that alcohol is the next smoking.

One thing we never thought we could get too much of were guests. But now cities such as Edinburgh and Bath are looking at the fate which has befallen locations such as Venice and Amsterdam, where once tourists were welcomed but are now seen as a plague. Running alongside this are, in the UK, cuts to funding, which have local authorities looking down the back of the sofa for small change and turning a glittering eye to those full bedrooms.

Demands are growing for bed taxes, just as hotels are facing ever-rising costs. A study by the All Parliamentary Group for Hospitality reported that local services countrywide were under pressure and councils were looking for a new potential revenue generator to remedy the shortfall. The Local Government Association recommended to the APPG that councils should have the option to introduce a tourist tax in consultation with their communities and businesses.

Hotels have protested that now is the time to temper this with lower VAT. The report looked at the 'European Model', identifying that in 18 of the EU28 countries there was a levy charged on overnight visitors, but that this was balanced by lower VAT, such as the 10% levied in Spain.

As the economy starts to waver, government will look to fill the coffers how it may. If the goose which lays the golden eggs doesn't want to face a cull, it must speak up.

Katherine Doggrell

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In June's issue...

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The Overview online
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Not so rare meet

HOSPA CEO Jane Pendlebury looks at some of this month's members' meetings

It's been a great month for members' meetings. With the support of Bim and the team at Vodat, we ran an informative evening meeting on keeping guest data secure, including a timely reminder that GDPR isn't something that's ever 'finished' but needs constant attention - perhaps even more so in hospitality thanks to employee fluidity. Then we gained an insight into keeping your data and network secure from many different types of attack. Scary stuff, but worth investing time and money to minimise your risk.

We also ran our annual Finance update with BDO. This is always a brilliant update for anyone involved in finance, and also for those who just want to make sure their general finance knowledge is current and relevant. It's impressive how the BDO team manage to cover so much in a lot of depth, yet deliver the content quickly without losing the human element.

We covered Financial Reporting, the National Minimum Wage, Capital Allowances, VAT and Brexit. If any hospitality finance people weren't able to attend, but would like a copy of the presentation then please let me know. I can't go into the detail on all the IFRS and FRS updates - but they are all there on the slides.

The BDO team went over the common mistakes employers make when paying the National Minimum Wage, which, if you are not aware of, are well worth looking at. The tax presentation once again focussed on the key hospitality VAT issue, which is, of course, non-refundable deposits. If this has passed you by, then you should be aware that VAT is now due on all non-refundable deposits and cancellation fees, regardless if the guest uses the goods and services, or not. The new policy is viewed as controversial given the previous approach, however that doesn't mean you can ignore it and you should ensure your VAT reporting follows the new advice. It may be worth asking HMRC for a special ruling - and if you do, please do keep us up to date with any responses. We also covered Making Tax Digital with some top tips on making sure you're on top of all the requirements.

Currently, I'm en route to Minneapolis for HITEC - the world's largest hospitality technology show. Unusually I am flying via Reykjavik with Icelandair - so it's a roundabout trip, but one that provides ample opportunity to write my Overview column! HITEC is useful for keeping up to date with global hospitality technology fads and trends as well as offering a great opportunity for networking. Following HITEC a few years ago we held a HOSPA members meeting in London afterwards with an update of what's new and exciting in hospitality technology. Having had numerous requests from HOSPA members in subsequent years, we are running an update meeting on September 12th in conjunction with KeyStep. I am looking forward to finding out what great developments and innovations we can share with you.

Amy Kimbel

Finance Manager at Plus Rooms

This month we feature Amy Kimbel, Finance Manager at Plus Rooms. Amy was winner of the highest achieving student award on the final element of the Financial Management course at Stage 3, Strategic Management Accounting completed in February 2018.

Amy was presented with her Award at the Annual Awards Ceremony in January 2019.

Amy's hospitality pedigree is very much in her blood, having followed her parents into the industry, which, combined with her love of travel, made her feel that it was the right path for her.

Initially starting out as a health club assistant whilst at university, Amy moved into a switchboard role on hotel reception, before seizing the opportunity to become a finance assistant.

Having always had an interest in finance, Amy was keen to learn more and worked in the role for one and a half years. However, with a front desk management opportunity arising, Amy stepped back from finance for a time before, having realised that finance was her preferred career choice, she then took the opportunity to become an Assistant Financial Controller for Plus Rooms - where she's been for a year, and it's while in that position that she's embarked on her HOSPA qualification.

Of her time as a HOSPA learner, Amy said: "The course has opened more doors for me professionally. It's a widely-recognised qualification that I'll have on my CV for life, and it's given me a full and broad understanding of the finance function within the hospitality industry. It's also helped me relate to other industries and has boosted my confidence with every module that I've completed."

Following her HOSPA experience, Amy hopes to learn as much as she can to keep progressing within a finance role, and has her eyes on a CIMA qualification.

HOSPA has an agreed path with CIMA with graduates of the HOSPA Finance courses able to gain exemption from two components of the CIMA Certificate in Business Accounting (2017 syllabus) - these components are:

- BA2 Fundamentals of Management Accounting (after successfully completing HOSPA Stages 2 & 3)
- BA3 Fundamentals of Financial Accounting (after successfully completing HOSPA Stage 1)

Several past HOSPA students have gone on to further their careers with CIMA qualifications - to learn more from some learner case studies visit: www.hospa.org/static/cms_page_media/12336/CIMA%20HOSPA%20Case%20Studies.pdf

Course recognition

The HOSPA Financial Management course is endorsed by the Institute of Hospitality, demonstrating that they adhere to good practice standards in training and training delivery, are relevant to the needs of the industry and meet a wide range of essential criteria relating to quality standards and quality learning outcomes. The IoH particularly commended:

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

We are now enrolling for the next intake to the HOSPA Financial Management courses commencing in September 2019. For more information email us at education@hospa.org or visit the HOSPA website at www.hospa.org/education

Welcome to the team!

The Dorset headquartered HOSPA Professional Development Team has been strengthened by the recruitment of Sue Callard who has recently joined us in the role of Senior Programmes Coordinator responsible for the academic administration and development of the HOSPA courses which include Financial Management and Revenue Management.

Sue joins us from Bournemouth University where she initially held roles in academic administration and then latterly specialised in educational IT taking on the role of Learning Technologist. Sue started her career in a public relations role with Disneyland Paris responsible for delivering a high level of customer service, demonstrating the Disney philosophy of a magical guest experience. Here she developed her passion for delivering exceptional customer interactions, whether in person, over the phone or online. At Bournemouth University Sue specialised in supporting students and academics in all aspects of delivering and using technology enhanced learning, including ePortfolios, online assessment, content creation, and discussion forums.

Merley House Business Centre in East Dorset

Sue joins us at an exciting time in the Professional Development office, which is located at Merley House Business Centre in East Dorset in an 18th century Georgian manor house. We are currently working on the upgrade of our virtual learning environment with a new exciting interface which will greatly enhance the educational experience for all our online learners. The new look learning platform, hosted by Dorset Creative and developed by arena4finance, will be available later this year.

In the meantime, with over 100 learners currently enrolled on the HOSPA courses, the team will be providing support for all those taking their examinations in a range of locations, both in the UK and overseas, on the 16th July.

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55% of people can't concentrate at work: Study reveals gap in market for co-working

Over 55% of workers who work remotely (either occasionally or full time) struggle to concentrate at work for at least half an hour each day, according to a new study conducted by Guestline.

People are therefore losing an average of 116 hours of work per year, which equates to almost 17 working days, due to a dip in productivity within their working environment.

The study conducted by Guestline surveyed 2,000 people in the UK to understand what it's like to work remotely and use co-working spaces. The statistics unveil the challenges people face when co-working and the growing shift in what remote workers desire.

It seems that the answer to these problems could be a space that we might not immediately associate with work, but which actually provides an ideal environment for modern-day employees - hotels.

What do people value in a workspace?

When people were asked what their most important factors were to choose a co-working space, the data revealed that it's all about providing an environment that runs smoothly:

Ranking	Factor
1	Internet Speed
2	Quietness
3	Comfortability
4	Facilities (Sockets, printing, seating etc.)

When asked what annoyed them the most in co-working spaces, respondents said that 'people talking loudly' was the most irritating factor, followed closely by a lack of privacy and uncomfortable seating.

Hotels vs coffee shops

Hotels scored higher than coffee shops for the top three factors that are important to people when choosing a co-working space.

55% of those surveyed say internet connection speed at hotels is very good or excellent. They were also rated as more comfortable places to work than coffee shops, with coffee shops found to be ten times louder than hotels.

Just under half of the people surveyed (46%) said that they would be more likely to use a hotel that has a dedicated co-working space, however, one in four felt that there aren't enough hotels that offer the facility. This suggests there's a gap in the market for hotels to market themselves as places that deliver what remote workers are looking for.

Kate Fuller, Marketing Manager at Guestline, said: "It's exciting to discover hotels could be a new solution for people who work remotely within the UK. Traditionally, coffee shops have been one of the typical, go-to destinations, but we are seeing a huge shift in co-working behaviour, with people desiring spaces that are quieter and still have all the facilities they need to work efficiently and conduct meetings.

"The research shows that hotels offer the three most important factors to people who co-work, which means it's time for hoteliers to get ahead of the game and create a designated co-working offering to maximise revenue and revolutionize the way people utilise their facilities."

The top cities for co-working spaces

The survey revealed that certain cities are better catered to offer co-working - the top five include:

Ranking	City
1	Leeds
2	London
3	Belfast
4	Cambridge
5	Coventry

These ranks were determined by four factors:

- Participants nearest city
- If they work in hotel spaces
- Likelihood to work in a dedicated co-working space
- When they work outside the office, where do they co-work from

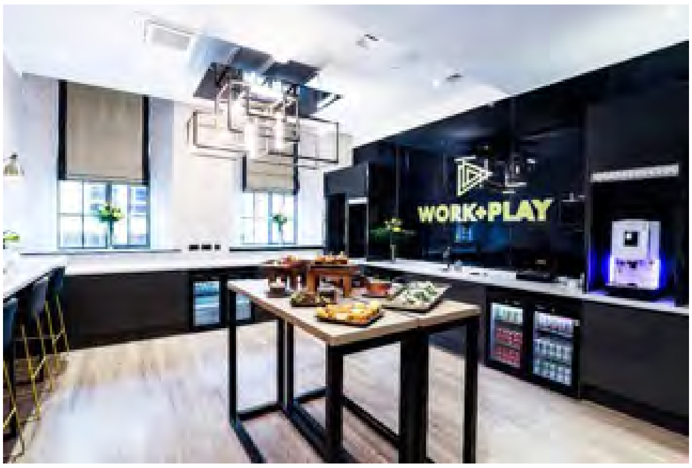
Leeds was found to be the top-rated city for co-working options based on their likelihood to use hotels which had dedicated remote working spaces. London followed closely behind. Belfast is the city that people co-work the most out of anywhere else in the UK.

Dominic Osborne, General Manager at Aviator Hotel by TAG said; "As many of our guests are elite travellers who are constantly on-the-go, we find it a priority for them feel comfortable working in our public spaces, whether that's alone or having a quick meeting with a client.

With popularity for co-working areas in hotels on the rise, it's great to see how the hotel industry can provide more than just a place to stay but also an area to conduct business."

Co-working hotels that shine

Malmaison - Leeds

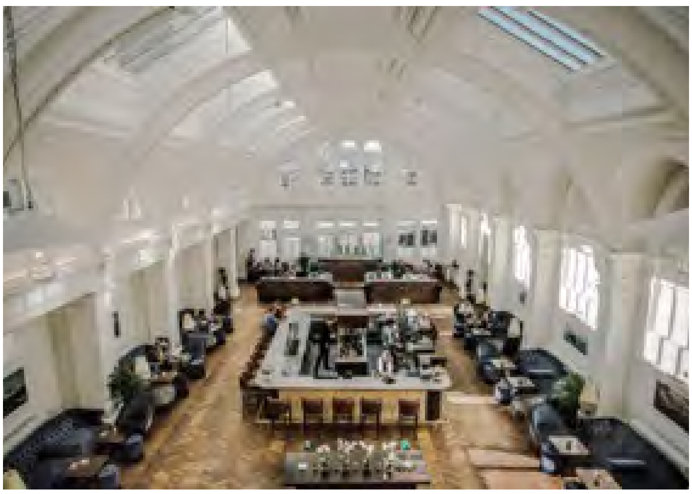


One of the best in the city, Malmaison hotel in Leeds provides an exclusive vibe to all its guests with fantastic office facilities. They also offer 'pods' for private meeting space so you can collaborate with ease.

The Hoxton - Shoreditch, London

The Hoxton Hotel in the suburb of Shoreditch is a relaxed and rustic hotel which has a strong sense of individuality. The perfect place to plug in your laptop and perhaps grab a coffee from the grill restaurant, in house. They also offer specially designed spaces for meetings which you can book, with fully a stocked fridge and drinks - a great way to impress clients.

The Titanic Hotel - Belfast



The Office Bar at the Titanic Hotel is not only lavished with a mix or contemporary and classic décor, it is the perfect spot for a client a meeting when you want to impress or a space to fire through some emails over a drink. The office bar is open to the public, or alternatively you can book one of their seven presentation rooms with opulent designs.

Where are people already using hotels as workspaces?

When looking at which cities are leading the way in terms of how many people currently use hotels as co-working spaces, Cardiff, Leicester, Sheffield, Worcester, and Wrexham come out on top.

In taking a closer look at the specific roles and industries these people work in, the survey revealed that those involved in information research analysis, business and management, hospitality and events, and engineering found hotels the most beneficial for co-working.

Workers in Birmingham are the keenest to use hotels as co-working spaces, and said they'd take advantage of this offering if it was available. The figures suggest those same people might be happier in hotels. With the nation's hotels offering comfortable, quiet, and well-connected environments, there's a clear opportunity for them to begin marketing themselves as co-working spaces.

Ellen Holcombe, Freelance Copywriter at www.wordperson.me said: "As a freelancer, my office can be anywhere - as long as I have my laptop! The problem is finding a quiet space to work from without getting distracted.

Over the last few years, I've noticed more hotels providing collaborative work spaces. They're usually much quieter than coffee shops with way more space - there's nothing worse than trying to write while squished up against another table! I can definitely see hotels becoming the next trend for freelancers and small businesses looking for co-working space."

All data is available upon request.

The study conducted was taken by 2,000 adults in the UK who are either full-time or part-time workers who co-work occasionally or frequently. The study aimed to gain insight into how people co-work and how day-to-day work culture is changing. The data from the study was also used to create an informative e-book with helpful tips which hoteliers can download for free here: www.guestline.com/blogs/co-working-in-hotels/

About Guestline

Established in the UK, Guestline provides innovative property management and distribution software to the hospitality industry. Founded on cloud technology, Guestline's revenue generating solutions enable hotel groups and independents of all sizes to achieve maximum occupancy at the most profitable rate.

Fully integrated into the Guestline distribution and central reservation platforms, the property management software is currently growing revenues in businesses in 25 countries across five continents. The range of products include Guestline PMS, online booking manager, CRS, channel, distribution, PCI compliance and EPoS systems.

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80% of loyalty programmes fail to drive further customer engagement

A commissioned study conducted by Forrester Consulting on behalf of Collinson, a global leader in customer benefits and loyalty, reveals that the majority of organisations in Asia Pacific are missing opportunities to leverage strategically on loyalty initiatives to drive further engagement during the customer lifecycle.

Surveying decision-makers in organisations with revenue exceeding $300m, the study asked respondents to grade their own loyalty programmes based on a series of measures, and also share their loyalty initiatives and approach for improving customer experiences. The study surveyed and compared the results for a number of countries and regions in APAC, including Hong Kong, mainland China, Singapore, Indonesia, Japan, Korea, and Australia.

Personalisation has been a talking point in loyalty for a while and loyalty practitioners in APAC realise it is key to a standout customer experience journey and for driving customer loyalty. Of the survey respondents, 72% say they intend to increase spending to improve customer experiences in the next 12 months. While they are arguably in a strong position to prove they understand and reward their customers with relevant experiences at the right moment during customer lifecycle, the research found that many organisations fall short when it comes to personalisation of customer experience:

- Only 26% of surveyed organisations personalise all promotional offers. Australia has the highest percentage (41%) of positive respondents in APAC in this regard.
- Less than half (41%) of surveyed organisations track and analyse the interactions between their loyal customers and their brands with the aim of improving the overall loyalty experience based on personalised, relevant content. Mainland China reported the lowest percentage (28%) compared with the highest percentage (74%) from Australia.

The research reveals that 56% of loyalty practitioners in APAC conduct regular loyalty-specific market research to better understand who are their best customers. Singapore (70%) is the best-performing market in this regard, followed by Australia (65%) and Japan (58%), with the lowest being Hong Kong (47%).

Mary English, Executive Vice President - APAC at Collinson, said: “Today’s consumers want to buy from brands that offer convenience, relevance, and a positive experience. Incorporating the data insights on customer behaviour into the customer lifecycle engagement strategy will improve the success of a loyalty programme, strengthening its effectiveness and return on investment.”

One of the most powerful aspects of a loyalty programme is maximising engagement at every stage of the customer lifecycle, instead of just recognising and rewarding customers at the point of sale. The research found that organisations are missing opportunities to leverage on loyalty programme mechanisms to drive further engagement at every customer touchpoint. Remarkably, they fail to make their loyal customers feel valued and special, typically because they are not providing exclusivity and convenience to loyalty programme members:

- Just 18% of loyalty practitioners in APAC and 25% globally are providing member-only events for their loyal customers. At 53% Australia is the clear leader amongst the surveyed markets in APAC, compared to just 5% in Hong Kong, 7% in Korea and 11% in mainland China. It is clear with regards to member-only exclusivity and loyalty rewards in the region, there is room to grow.
- Only 30% of respondents are adopting experiential benefits in their loyalty programme. Australia has the highest percentage (43%) among the surveyed markets in APAC.
- Less than one third (33%) of respondents provide their loyal customers with instant access to coupons and reward redemption, though close to half (47%) are currently using a points-based system for payment/redemption.

Mary added: “Customers are drawn to the ease of participation and the rewards available in a loyalty programme, or they would not bother joining. It is about taking your loyalty strategies to the next level and creating unique and special experiences for the customer that removes common pain points and makes their lives easier. Designing a loyalty proposition based on the customer experience is the foundation to successful loyalty initiatives. Within this, organisations that offer customers the experience of choosing and receiving just the right rewards drive emotional engagement with the brand.”

Planting a flag

A growing number of consumers are extending Veganuary around the year, Katherine Doggrell investigates the trend.

A study by Nisbets at the start of the year found that 25% of diners were choosing vegan and vegetarian options, a trend which was marching hand-in-hand with locally-sourced food.

Global research firm Mintel found that 49% of people asked cited health concerns as the main reason for reduced meat consumption, with weight management (29%) was the second most popular reason. Concerns over animal welfare (24%) and environmental considerations (24%) were other significant motivators.

Research published by TUCO in the 2017 Global Food and Beverage Trends Report found that 72% of Gen Zs would pay a premium for products from companies committed to positive social and environmental impact.

Self-identified vegans and vegetarians accounted for approximately 3% of the UK population, but they are amongst a broader base of people showing an interest in reducing meat and dairy intake.

According to Mintel, at least 11% of Britons have tried to follow a vegan diet. The number of serious carnivores with meat on their plates more than 10 times per week has dropped 14% since 2015.

There has also been an increase in the number of 'flexitarians' or 'reducetarians', who want to reduce their meat intake without wanting to adhere to the 'all or nothing' ethos of strict meat avoidance.

A number of high-street chains have added vegan options to their menus, but May this year saw Pret A Manger make a significant strategic move with the purchase of the Eat estate.

In response to growing consumer demand for more vegetarian and vegan options on the high street, Pret plans to convert as many of Eat's shops as possible to "Veggie Prets."

The first permanent Veggie Pret was opened in September 2016 and has since expanded to three further locations across London and Manchester. This acquisition is expected to significantly accelerate the growth of this brand.

Clive Schlee, Chief Executive Officer of Pret said: "The purpose of this deal is to serve a growing demand of vegetarian and vegan customers who want delicious, high quality food and drink options. We have been developing the Veggie Pret concept for over two years and we now have four hugely successful shops across London and Manchester. The acquisition of the Eat estate is a wonderful opportunity to turbo charge the development of Veggie Pret and put significant resources behind it."

Gaining a certain number of column inches earlier in the year was Greggs, which launched a vegan sausage roll in January. Piers Morgan responded to the product launch by tweeting: "Nobody was waiting for a vegan bloody sausage, you PC-ravaged clowns".

In the group's preliminary results announcement on 7 March it reported "a very strong start to 2019", with company-managed shop like-for-like sales growth of 9.6% in the first seven weeks of the year. This built on a strong finish to 2018 and was further boosted by the publicity surrounding the launch of its vegan-friendly sausage roll. The group commented: "Sales since then have continued to grow very strongly, helped by the roll-out of vegan-friendly sausage rolls to all shops following limited availability in the early part of the year when demand outstripped supply."

Piers stood corrected and F&B outlets are now taking note.

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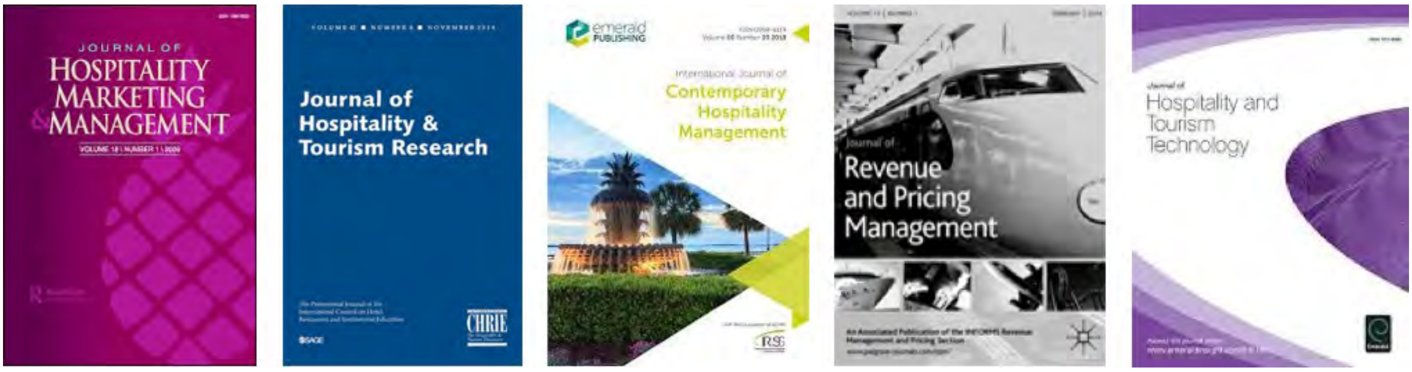

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A la mode

Companies looking to cut construction costs and speed expansion are looking to modular hotels for growth, reports Katherine Doggrell.

There is much to enjoy about a building-block hotel. Companies looking to build in constricted space - central London, say - where time on site is money lost, are all looking to plug and play hotels.

The world's tallest modular hotel - which will carry a Marriott brand - is on track to be stacked in late fall in New York City with prefabricated and pre-furnished guestrooms. Once erected over a 90-day period, the 360-foot-tall tower will represent a milestone for Marriott's ongoing initiative to encourage hotel developers in North America to embrace modular for new construction projects. To be topped with a modular roof and modular rooftop bar, the world's tallest modular hotel is expected to open in late 2020 as the AC Hotel New York NoMad.

"In North America, the construction process hasn't changed significantly in 150 years and it's ripe for innovation," said Eric Jacobs, Marriott International, Chief Development Officer, North America, Select and Extended Stay Brands. "The world's tallest modular hotel in one of the world's greatest destinations will act as a game-changing symbol to ignite even greater interest in modular among the real estate and lending industries."

The 168-room, 26-story AC Hotel New York NoMad is scheduled to rise at 842 Sixth Avenue with prefabricated guestrooms arriving at the hotel site fully constructed, inside and out. Besides finished, painted walls, each "module" will contain a fully outfitted guest room - with beds, sheets, pillows, flooring and even toiletries. The hotel's roof and rooftop bar are expected to be produced using modular construction, and its more customised public areas such as the restaurant and lobby are expected to be constructed using traditional methods.

Prefabrication is a process that Marriott has found typically reduces the construction timeline, curbs site waste and noise, and results in a higher-quality product produced with factory level precision. The time savings comes from the ability to perform two crucial functions simultaneously - building the public spaces on site while manufacturing the guest rooms offsite.

"This is the moment where modular construction takes centre stage," says Danny Forster, a leading modular building advocate whose firm, Danny Forster & Architecture, designed the project. As he explains it, "This hotel takes every advantage of off-site manufacturing, as you might expect. But it does so in a way that defies expectation. We wanted to demonstrate that modular building can do more than just harness the efficiencies of the factory. It can produce a graceful and iconic tower. And yes, it can do so at the rate of an entire floor a day."

Marriott began researching modular construction in 2014 to offset lengthening hotel construction times - a trend attributed to the nation's building boom and resulting labour shortages. Since 2011, Marriott has seen the average time to build and open a hotel in North America increase by as much 50 percent, depending on factors such as location and size of property.

Since 2015, Marriott has been educating owners, franchisees, architects, lenders, consultants, general contractors and other stakeholders across the industry about the benefits of modular by hosting town halls, factory tours and stacking events. The company also worked with leading modular manufacturers to help them better understand the untapped demand that hotel development companies represent.

Since the launch of Marriott's initiative, the company's development partners in North America have opened 31 Marriott-brand hotels - all low-rise structures - that incorporate prefabricated guestrooms and/or bathrooms, including a Fairfield by Marriott Inn & Suites in Folsom, Calif.; a Courtyard by Marriott in Pullman, Wash., and three AC Hotels in Oklahoma City, Louisville, Ky., and Chapel Hill, N.C. To date, the largest Marriott-branded modular-built to open is the 354-room, dual-brand Courtyard and TownePlace Suites by Marriott property in Hawthorne, Calif., while the first to also incorporate a prefabricated elevator bank was the Fairfield by Marriott Inn & Suites in Prairie, Wisc. Later this year, a developer will start stacking the first modular-built Moxy hotel in the United States in downtown Oakland, Calif.

The company continues efforts to support developers interested in leveraging prefabrication, most recently launching modular versions of its prototypes for four of its higher-volume brands: Courtyard by Marriott, Fairfield by Marriott, SpringHill Suites by Marriott and TownePlace Suites by Marriott. Underscoring its commitment to igniting demand for modular construction, Marriott this year is offering an incentive to development companies that leverage prefabrication for guestroom construction.

In developing regions, such as Africa, Hilton has committed to modular building, describing "numerous benefits including faster development, streamlined design and cost efficiencies. The process involves assembling portions of the hotel - including guest rooms and hallways - in China, before transporting them to the final site for completion, thereby significantly reducing the time taken for construction. The model helps ensure consistent quality and accelerates the build schedule on site, a particular benefit for developers and investors in emerging markets."

Hilton worked with Chinese shipping container manufacturer CIMC, which also worked with Hilton in the UK, starting with the Hampton by Hilton at Bristol airport in the UK.

CIMC was hoping to plug a shortage of skills and traditional building materials that has led to significant construction cost inflation in recovering western European markets, led by the UK and Ireland. Growth in housing production and stronger demand for new offices have led to a situation where contractors in London and the south east are complaining building costs have escalated.

Patrick Fitzgibbon, senior vice president, development, Europe & Africa at Hilton Worldwide said: "CIMC's capacity to deliver modular sections of the building to the final hotel site offers an incredible opportunity to overcome many of the challenges faced during construction. Alongside potential time and cost efficiencies, CIMC's ability to provide senior debt to developers using its modular building technique underpins its robust growth model, and we are seeing more and more opportunity for this structure in mature markets such as the UK, and developing economies, most notably in Africa."

CIMC's modular construction approach is not new to the UK. The company has delivered key structures for a number of budget hotel developments including several Travelodge and Premier Inn sites. Travelodges in Heathrow, Uxbridge and Warminster, and Premier Inns in Hull, Gatwick, Blackpool and Manchester have seen the construction method tested first for extensions, then for complete hotels.

The CIMC model builds two hotel rooms and a section of corridor into a steel box with the dimensions of an oversize shipping container. The boxes are fully fitted out complete with bathrooms and finished interiors, and then shipped on regular container ships and trucks to site, before being mounted on a ground floor frame that allows for hotel public spaces. A regular building exterior cladding is then used to complete the project, such that there is no hint visually of the different construction method used.

The idea is also gaining traction in Africa, where modular construction is seen as a solution to the problem of a lack of local construction expertise.

CIMC's Paul Blackmore said: "We are delighted to be working with Hilton Worldwide in Europe and Africa, and are looking forward to further introducing our unique concept to these key markets - which will assist with satisfying the increasing demand for good quality hotel rooms that are able to be delivered at a fast pace."

And Fitzgibbon added: "We continually seek innovative ways to develop and operate our hotels, and our latest venture is no different. Coupling this novel approach of modular design with the development prospects Africa presents, we are excited about the expansion opportunities of our portfolio on the Continent. As we gain further momentum in developing Hilton Garden Inn across the region, we believe that by offering this fast-paced construction solution, owners and investors will see returns more quickly whilst guests will continue to experience the quality and service of Hilton Garden Inn for which the brand is world renowned."

CIMC's activities extend from its core container and shipping business through truck manufacture, energy and chemical equipment, airport and offshore facilities, and financial services.

Its CIMC Capital division already provides finance to customers across other sectors, leasing vehicles, offshore equipment and major process plants.

For some brands, the convenience has beckon the brand, with Accor launching a temporary hotel concept using shipping containers, called Flying Nest, in 2018.

The brand, designed to meet extra capacity needs at events and during busy periods, was tested at various cultural, sporting and artistic events throughout France. Sébastien Dupic, new business senior project manager, AccorHotels, said: "Originally developed for a B-to-B clientele - event organising agencies, exhibition organisers, festivals, events, corporate clients, AccorHotels partners - the Flying Nest concept could also be offered to a B-to-C target in 2019."

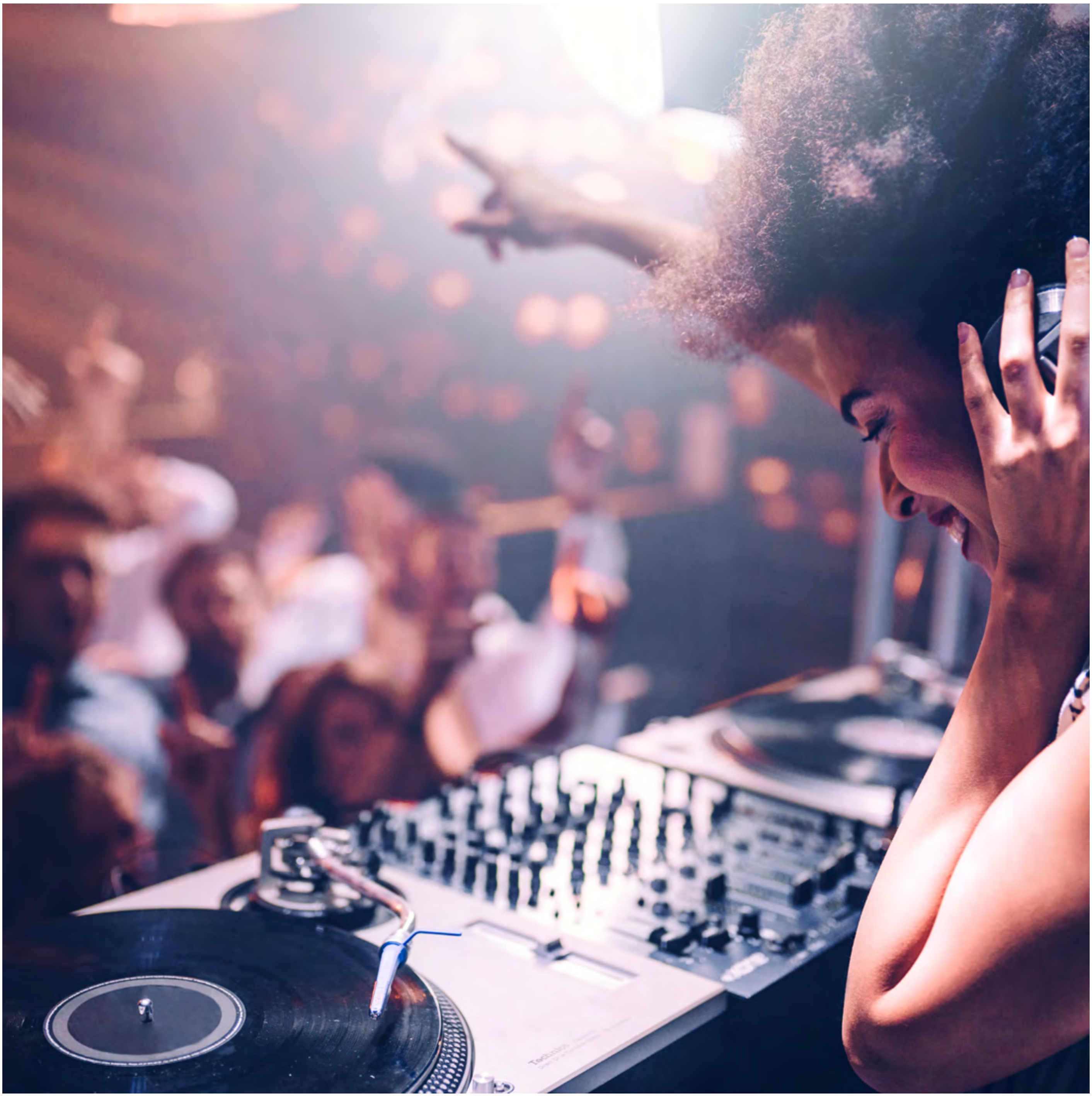
The product uses converted marine containers, which are then put into 'islands; of six modules clad with raw and natural materials and featuring a private bathroom, air-conditioned living area and Wi-Fi. The modules of six containers provide five rooms and one "technical room". Each island takes half a day to assemble.

"The layout of the islands, the patio and the large windows connecting the inside of each room to the outside all provide guests with a totally immersive accommodation option at the heart of the experience", said Damien Perrot, SVP, design at AccorHotels.

The company said that, through the Flying Nest project, AccorHotels was "reaffirming its commitment to serving its customers at all levels, including at cultural, sporting and entertainment events".

Modular building is not without its critics. Shipping air from China does not make for fantastic green credentials and architects have complained that slotting blocks together can mean double-width walls which can reduce room count. But with construction workers at a premium, it's time to channel your Lego childhood.

Hospitality warns on PPL increase



The sector has warned on additional fees, Katherine Doggrell reports.

The Phonographic Performance Limited has published details of its new Specially Featured Entertainment tariff, coming into effect on 1 July 2019.

The new tariff relates to the playing of recorded music in public at events such as discos and DJ nights and applies to nightclubs, pubs and bars, cafes and restaurants, and hotels.

The announcement follows a formal period of consultation with PPL's SFE licensees between July and October 2018, covering the scope, structure, fees and implementation of a new SFE tariff. The current tariff has been in place for around 30 years, and PPL's view was that the fees in it were too low to be an appropriate reflection of the value to businesses of using recorded music at SFE events. PPL also believes the SFE tariff requires structural reform to make it clearer and fairer.

The new SFE tariff will therefore see a number of changes and clarifications, including:

- Measuring the audience at an SFE event by using the total number of admissions to the event.
- A change so that the fee will increase in direct proportion to the size of the audience (measured in bands of 25

persons). This will help to ensure SFE events with different audiences are treated fairly and consistently.

- The introduction of two new smaller tariff bands, for SFE events with attendances of 1-25 and 26-50 persons. In many cases, this will help to ensure that licensees with small SFE events will initially pay less for such events than they are paying under the current SFE tariff.
- The phased introduction of increased fees over a five year period from July 2019, based on an initial rate of 4 pence per person per hour (up slightly from the current average of 3.9 pence per person per hour). This will move to fees based on a rate of 9 pence per person per hour by 2023 (subject to annual indexation), giving licensees time to adapt to the increases.

Commenting on the new SFE Tariff, PPL Chief Executive Officer Peter Leathem said: "I would like to thank our licensees for engaging with PPL's Specially Featured Entertainment consultation. We have listened to their views as part of finalising our new SFE tariff. Recorded music forms a very significant part of SFE events and we believe that the new SFE tariff delivers a fairer return for our members who create that music. We look forward to working with our licensees and their representatives to ensure as smooth a transition as possible to the new SFE tariff."

PPL has said the current fees are "too low to be an appropriate reflection of the value to businesses of using recorded music at SFE events".

The hospitality industry has issued a warning about the impact of any changes.

UKHospitality will undertake a legal challenge of PPL's proposed tariff increase to ensure that any future increases remain proportionate and affordable for businesses.

UKHospitality Chief Executive Kate Nicholls said: "Significant increases to PPL's tariffs will be devastating for many venues already struggling to cope with increasing costs. Margins are shrinking, costs are increasing and many venues simply are not going to be able to pass these costs on or swallow them. A huge hike in PPL fees will mean some businesses will be strangled and there will be much less choice for customers.

"UKHospitality has been leading the fight to ensure that any increases remain fair, proportionate and affordable. That is why we are spearheading a legal challenge, alongside the British Beer and Pub Association to make sure that fees cannot be arbitrarily raised to exorbitant levels. Pushing PPL fees sky-high does nobody any favours. If venues can no longer afford the cost of a licence, PPL is, ultimately, shooting itself in the foot.

"A constructive relationship between ourselves, PPL and venues is mutually beneficial and we will continue to work towards that. We all have the same goal of seeing as many people as possible enjoying themselves and their favourite music in nightclubs, bars, pubs and other venues. We all need to be working harmoniously, and that means not gouging venues unfairly."

BBPA Chief Executive Brigid Simmonds added: "We are extremely disappointed that PPL are proposing such eye-watering increases to their Specially Featured Entertainment tariff which covers pubs, clubs and other venues that put on discos and DJ events for customers. A 450% increase in the tariff (from 3.8p per person per hour, to 22p per person per hour) on top of proposed structural changes that could more than double this figure, will simply not be viable for many licensees at a time when pubs are already facing major cost pressures in terms of increasing taxes and other regulatory costs. Whilst we welcome discussions on ensuring fairness and clarity in how the tariff is calculated and if improvements can be made to deliver this, we believe that these discussions must take place first and any impact considered further before there are proposals for cost increases.

"As PPL note in the consultation document, the SFE tariff is already increased annually by the Retail Price Index. Of course, RPI itself is now a discredited measure of inflation, but the use of this measure will have seen the SFE tariff increase by over 50% since 2003. This is compared to a 38% increase in the Consumer Price Index, the official measure of inflation, during this period. We are grateful for the dialogue and engagement we have had with PPL on this issue over the last year, but see no justification for further increases in the tariff at this time and we will be responding accordingly."

Things could go very quiet if a compromise is not found. The tariffs came a few months after the Digital, Culture, Media and Sport committee called for action to safeguard the future of the UK's live music industry.

The body said that, in the past decade, the UK has seen the closures of music venues nationwide, while sites that remain face a struggle to stay open given rising costs and declining revenues. Unsubsidised, small and medium-scale venues face particular problems attributed to rising rents and business rates and stagnating incomes.

A report from the DCMS found that the government had failed to act promptly to stem the tide of the closures happening on a scale unprecedented in other cultural sectors, a development that presents a significant and urgent challenge to the music industry. Evidence suggested that the UK's position at the forefront of the music industry could be at risk because the next generation of musicians will be denied spaces to hone their live craft.

It said: "The government should immediately review the impact of recent business rates changes on the live music sector and introduce new or extend existing relief schemes such as those for pubs or small retail properties to lessen the burden of business rates on music venues in order to protect grassroots venues and independent festivals.

"Further support should be given by the government by extending tax relief, already given for orchestra performances, to other forms of music production."

The report quoted the Association of Independent Festivals, which identified that through supporting local landowners, suppliers and facilities a 5,000 capacity festival could generate approximately £800,000 in net gain to the local area, while a 110,000 capacity festival can generate £18 million for the local area. While such income was significant for the rural economy, live music also contributes to the 'night-time economy' in urban areas. The Music Venue Trust said that "for every £10 spent on a ticket in a grassroots music venue, £17 is spent elsewhere in the night-time economy."

Live music was also a key driver of tourism to the UK. The Department for Digital, Culture, Media and Sport said that, according to the International Passenger Survey in 2016, 1.9milion international visits to the UK were made with the intention of attending a live music event and 1.3milion visitors came to the UK intending to attend a festival. For the same period, visitors attending live music events spent £1.7bn and those attending a festival spent £1.2bn.

Jeff Horton, owner of the 100 Club on London's Oxford Street, told the committee: "The place of history and heritage in art and music is very important and part of London's fabric, and I think that if you speak to most people who visit London, and if you ask them the first thought that goes into their head about the UK, they will almost certainly say music. It is what we do and we are still brilliant at it."

As the UK's global position shifts, safeguarding that brilliance is paramount.

Chinese, Brazilians, look to Europe

Despite global slowdown concerns and political tension between leading economies, travel sentiment towards Europe proves upbeat for the summer period in both China and Brazil. According to the latest results of the Long-Haul Travel Barometer, the travel sentiment index in both markets improved by four points over the same period last year. The Barometer, a joint initiative of the European Travel Commission, the European Tourism Association and Eurail, measured the intention of 1,000 people from Brazil, China, Japan, Russia and the US to travel to Europe between May-August 2019.

Europe remains high on Chinese travellers' wish-lists

More than one in two (54%) Chinese respondents indicated that they have a European destination in mind for the summer period. This reflects well on the 2018 EU-China Tourism Year, the success of which continues to be felt, the increasing affluence of Chinese citizens, improved air connectivity and visa relaxation policies introduced in some European countries. Digging deeper into the survey results, 70% of Chinese travellers have indicated that they will stay in Europe between seven and 14 nights and are likely to combine an average of four destinations in a single trip. Interestingly, while France and Germany top the list for European destinations, several countries have significantly grown in popularity over the past 12 months amongst potential Chinese travellers. These are Croatia, Italy, Hungary, Monaco, Romania, San Marino and Serbia.

Political change in Brazil brings optimism with positive effects on travel sentiment

In Brazil, intention to travel improves in the summer months, with two in five (39%) respondents having a European destination in mind. The optimism brought by government change and monetary policy capping interest rates bode well for people's travel sentiment, yet it remains to be seen whether this will translate into actual behaviour as economic trends remain negative. The attraction of local food, sightseeing and the natural landscapes in Europe are among the main factors appealing to Brazilian visitors this summer, with Portugal and France being the top two destinations identified.

Russians show keener interest to visit Europe over summer

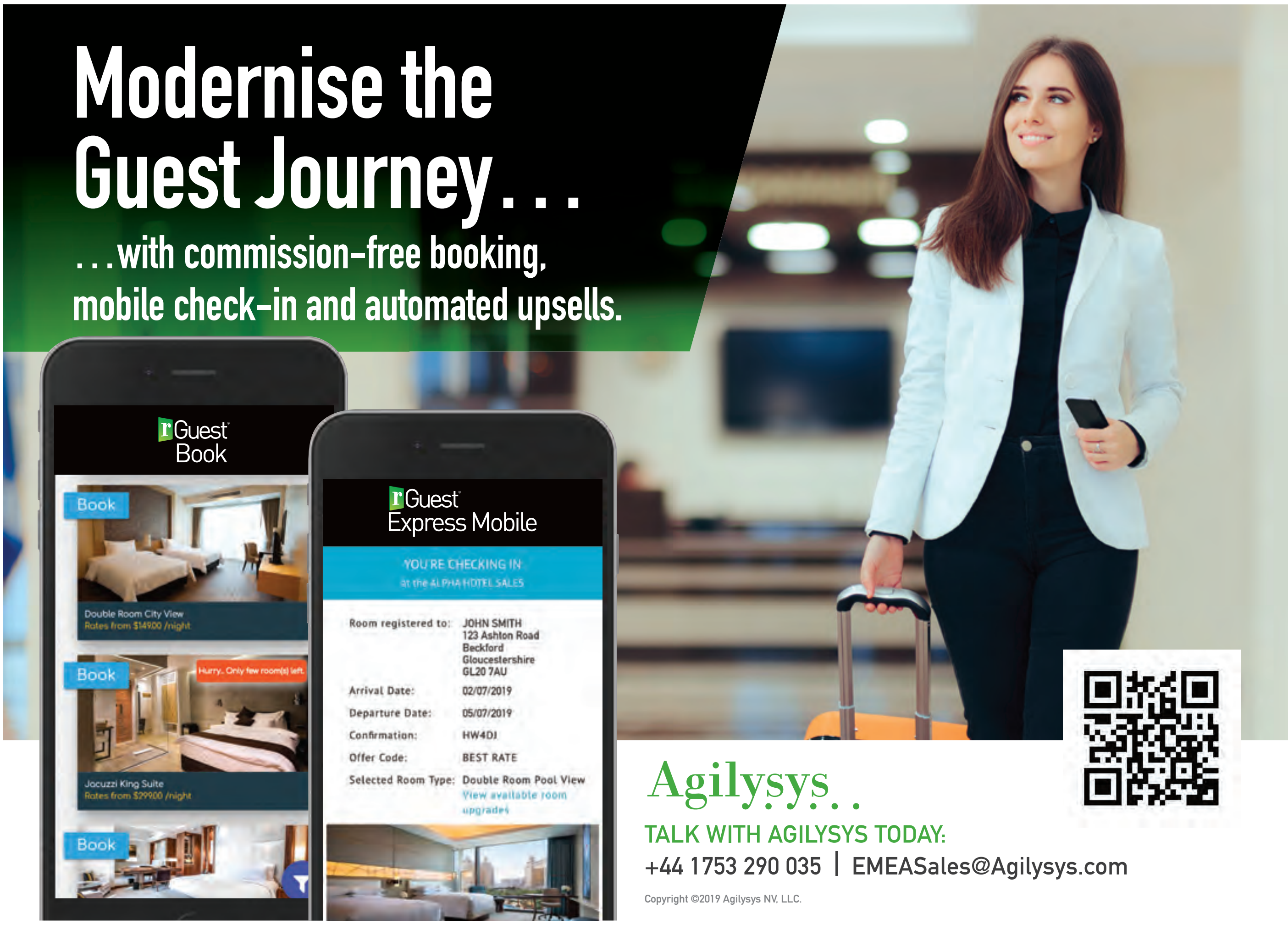
While Russian sentiment to travel to Europe was sluggish at the start of 2019, results for the summer months point to a revitalised interest for European destinations, with Germany at the top of the wish-list. However, the constant fluctuation in the rouble exchange rate, a hike in value-added taxes, surging inflation and a stagnant labour market might drag actual travel behaviour down. The majority (70%) of Russian respondents eager to visit Europe between May-August plan to spend between seven and 14 nights in the region.

US travel sentiment declines in the wake of economic headwinds

Fading fiscal stimulus and trade uncertainty have dwindled consumer confidence putting pressure on Americans' travel plans to Europe this summer, with US sentiment index declining from 103 index points at the beginning of the year to 96 for the summer months. Just 27% of US respondents plan to visit Europe between May-August 2019, however, given the current strength of the US dollar against both UK sterling and the euro, Europe is likely to be a favourable choice for US tourists still considering their summer vacation plans. France and Italy are top of the destination list for US visitors, with sightseeing being the most popular experience by far.

Travel sentiment in Japan remains negative

The global slowdown weakens Japan's stressed economy in Q1 2019, weighing on consumers' confidence and households spending. Just 18% of respondents are planning to visit Europe between May-August 2019, following a mixed demand from the Japanese travel market in 2018 and early 2019. Of all surveyed respondents, Japanese tourists are most likely to stay in Europe for the shortest period, with 52% of respondents planning to stay for less than seven days.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Pub and restaurant groups report zero growth in May

Britain's managed pub and restaurant groups saw trading flat-line in May, according to latest figures from the Coffer Peach Business Tracker. Collective like-for-like sales growth across the market was zero, compared with the same period last year.

Regionally, London saw like-for-like sales down 0.6%, while outside the M25 same-site sales were up a marginal 0.2%. Restaurant chains performed better than pubs and bars, and more strongly than in recent months, with like-for likes up 3.1%, against May last year. In comparison, pub and bar groups saw collective like-for-likes fall 1.7%, with drink sales down 2.4% and food down 1.6%.

"The public still went out to eat and drink, but only at the same level as last May. While this could initially seem like bad news for the market, especially after the positive growth seen in March and April, we have to remember that May 2018 benefitted from consistently good weather and the royal wedding, both boosting performance. Maintaining sales against this positive backdrop, and throughout what is widely acknowledged as tougher trading conditions, is no mean feat," said Karl Chessell, director of CGA, the business insight consultancy that produces the Tracker, in partnership with Coffer Group and RSM.

Trevor Watson, executive director, valuations at Davis Coffer Lyons, said: "The pattern of spending in restaurants and bars reflects weather variations. At Davis Coffer Lyons, we are experiencing improved activity in terms of site finding, with many successful operators taking the view that now is a good time to acquire high quality locations without needing to pay for excessive premiums."

Paul Newman, partner and head of leisure and hospitality at RSM, added: "Given the backdrop of continuing political and economic uncertainty, growth rates have remained remarkably resilient throughout May. Operators have experienced much volatility in recent trading with performance fluctuating wildly throughout April, with a late Easter weekend, shifting bank holidays and some extremes of weather to navigate. The overall market remains flat and those who remain open for business will hope to begin to benefit from recent restaurant closures in the months ahead."

Total sales across the 52 companies in the Tracker, which include the effect of net new openings since this time last year, were ahead 2.4% compared to last May.

Longer-term underlying like-for-like growth for the Tracker cohort, which represents both large and small groups, was running at 1.7% for the 12 months to the end of May.

Inflation bubbles on soft drinks

A slight fall in some food prices was eliminated by rises in beverage categories keeping the Index from Prestige Purchasing and CGA at a high level, but last Spring's increases eased the inflation numbers. Year-on-year foodservice inflation fell back in April from March - the latest edition of the Foodservice Price Index from Prestige Purchasing and CGA revealed - but price rises on hot and soft drinks have kept the total basket of goods static month on month.

Soft Drinks saw great year-on-year and month-on-month inflation, as the category continues to climb higher. Several factors are at play here, including the development of new, more environmentally friendly packaging, in light of increased public scrutiny of single use plastics. Whilst the sugar tax has only earned half the expected tax revenue since its inception, and demand for sugary drinks has reduced, this has still contributed to the yearly price increases recorded. The reformulation of soft drinks in order to contain less sugar has also been a significant factor in this category's increase. Finally, the changing consumer demand for soft drinks is pushing the Index up. Consumers seek healthy, high quality, great tasting, sustainable drinks, which is proving challenging for manufacturers, incurring development costs and premiumisation of drinks which is resulting in higher prices.

Hot drinks have also seen a rise in inflation due to issues surrounding tea production. Most notably, drought conditions in key tea growing regions such as Kenya and India. Therefore, the yield of tea in these regions has been hampered and we expect prices to continue rising. Increasing cost of materials, and changes to the materials used to make tea bags have also contributed to firming tea prices. The increased cost of tea has been particularly influential on this category as despite global coffee prices falling, the index has risen for Hot Beverages.

Prices in the Fish category have eased after April's historic peak thanks to the Easter holiday. But the global salmon market may see some significant uplift in the next few months from two major issues: a possible plummeting of Norwegian salmon yields after an algal bloom hit stocks; and an investigation into overuse of chemicals by leading producer Mowi, which may cause damage to Scottish Lochs. Also, yields of Norwegian salmon could plummet, as an algal bloom has already killed 10,000 metric tonnes of fish, a figure which is set to rise. The global salmon market looks like it will experience some significant uplift in coming months as shortages hit.

Milk, Cheese, and Eggs has witnessed high year-on-year inflation this month. This time last year the Milk, Cheese and Eggs Index was low following a period of high milk production in early 2018. High production led to low milk prices, resulting in the year-on-year inflation we see for this category. In April this year, milk production has hit a three-year high and we would expect to see the Index fall in coming months as cheaper milk hits the market.

Tough April for UK Hotels

Hotels in the UK suffered their largest margin of year-on-year profit decline since late 2016, as ancillary revenues fell and costs soared in April, according to the latest data tracking full-service hotels from HotStats.

The 10.0% YOY decline in GOPPAR, to £43.22, was far greater than the 1.0% decrease in RevPAR, which came in at £87.39 for the month.

Revenue declines were felt across all departments, including YOY declines in Food & Beverage (down 6.4%) and Conference & Banqueting (down 14.2%) revenue, on a per-available-room basis.

As a result, hotels in the UK suffered a decline in TRevPAR for the first time in 2019, falling by 2.6% to £131.97. YTD TRevPAR is still 0.2% above the same time last year, at £125.63.

Declining top-line performance was further hit by ongoing increases in costs, which included a 2.8% YOY uplift in payroll to £41.16 per available room, equivalent to 31.2% of total revenue.

The drop in profit was the largest YOY decline in this measure since October 2016 when GOPPAR fell by 11.6%.

And April was only the second monthly YOY decrease in achieved average room rate since October 2016, falling by 0.8% to £113.30.

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

April 2019 v. April 2018

RevPAR: -1.0% to £87.39

TRevPAR: -2.6% to £131.97

Payroll: +2.8% to £41.16

GOPPAR: -10.0% to £43.22

"Whether or not unfinished Brexit is to blame, the hope is that the profit deflation this month is an exaggerated blip due to the timing of Easter, rather than something more ominous," said Michael Grove, Director of Intelligence and Customer Solutions, EMEA, at HotStats.

The leisure-led Stratford-upon-Avon hotel market was one location to benefit from the timing of Easter, as events in key visitor attractions across the town, including the RSC Theatre and Guildhall, helped fuel a 10.3% YOY increase in RevPAR to £64.30, as the recovery in the market in 2019 continues apace.

However, and in spite of a 2.8% increase in ancillary revenues contributing to a 7.0% increase in TRevPAR, revenue growth in the month was impacted by a 10.9% YOY increase in payroll on a per-available-room basis to £42.40.

As a result, profit per room at hotels in Stratford-upon-Avon fell by 1.2% to £28.62. This is equivalent to a profit conversion of 26.0% of total revenue.

Profit & Loss Key Performance Indicators - Stratford-upon-Avon (in GBP)

April 2019 v. April 2018

RevPAR: +10.3% to £64.30

TRevPAR: +7.0% to £109.92

Payroll: +10.9% to £42.40

GOPPAR: -1.2% to £28.62

In contrast to the wider UK, it was a positive month of performance for hotels in Reading, with a 4.2% YOY increase in RevPAR to £62.08, contributing to a 16.4% increase in profit per room and the ongoing upward trajectory in GOPPAR in the town.

The increase in profit was supported by an eighth consecutive month of ARR growth to £89.69, and a sixth consecutive month of room occupancy growth to 69.2%.

Profit & Loss Key Performance Indicators - Reading (in GBP)

April 2019 v. April 2018

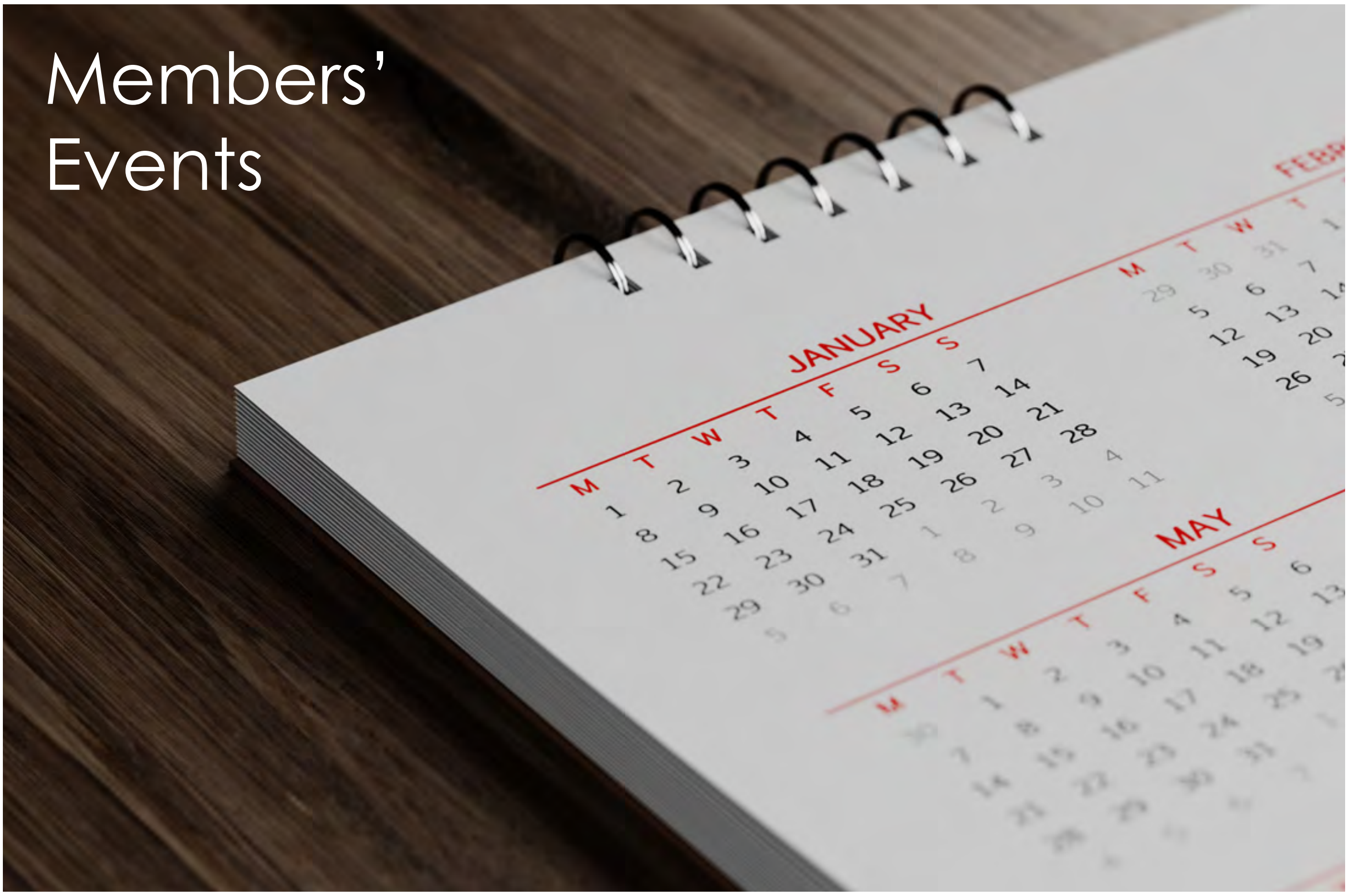
RevPAR: +4.2% to £62.08

TRevPAR: +6.6% to £114.09

Payroll: +0.9% to £35.43

GOPPAR: +16.4% to £39.95

Members' Events



12th September
HITEC Update - sponsored by Keystep

"A postcard from Minneapolis"

Event Details:
Summary notes from the keynote speeches at HITEC.

Learn about the next big industry threat, the role of AI in hospitality and if Chatbots will replace our front desk staff.

7th October
In Room Technology - sponsored by SKY

Event Details:
From TVs to WiFi and voice recognition.

What guests actually do and don't want.

Venue:
One Aldwych,
1 Aldwych, Westminster, London WC2B 4BZ

28th November
HOSPACE 2019 - A one-day annual international conference hosted by HOSPA.

Venue: Royal Lancaster, London

British, US and other international delegates attend to get an informed and cutting-edge view from an international line-up of inspirational experts, all recognised and respected in their own field, about the latest key financial, revenue and IT management issues and developments.

This year's eagerly awaited HOSPACE Annual Conference and Exhibition for hospitality finance, revenue management, asset management, marketing, IT and commercial professionals is the largest and most prestigious annual gathering of like-minded hospitality practitioners in the UK.

HOSPACE will enable UK and international delegates to get an informed and cutting-edge view from an international line-up of inspirational experts - all icons in their own field - about the latest key financial, revenue and IT management issues and developments; as well as the commercial aspects that connect these together to maximise profitability and create value.

As in past years, HOSPACE will be supported by a growing and increasingly influential exhibition of hospitality technology solutions - providing delegates with a 'one stop shop' to view and interact with the latest and 'best in class' technologies - covering all eventualities for any hospitality business, whether they be start-up, established independent, or multi chain-owned, operations.

HOSPACE promises to be invaluable for networking, professional updating - through expert presentations, panel forums and educational workshops - and experiencing Continuing Professional Development (CPD).

The event's grand finale Gala Dinner - including the presentation of the Inspirational Leader of the Year Awards for Finance, Technology, Marketing and Revenue Management. Making HOSPACE Gala Dinner one of the social networking highlights of the year.

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

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- ✓ Increase brand awareness, generate new sales and acquire new customers.
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- ✓ Conduct face-to-face engagement with key industry decision makers and clients.
- ✓ Be part of the UK's only organisation representing senior professionals in the hospitality industry.
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For Further Information please contact Helen Marshall - Helen.marshall@hospa.org

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