

THE OVERVIEW

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HOSPACE 2012
Speakers Announced
Success for HOSPA learners



HOSPACE 2012
CONFERENCE & EXHIBITION
COMING THIS NOVEMBER

HOSPACE 
Conference & Exhibition 2012

Welcome to THE OVERVIEW

It is now almost two years ago that we received the funding from the Savoy Educational Trust to enable HOSPA to develop and launch the Education and Training Programme in Revenue Management. This September we are finally now able to offer all three stages of the programme, with the learners who joined us last September on Stage 1, forming the first intake for the final stage.

Our thanks to all our supporters, in particular the Savoy Educational Trust, our friends at Oxford Brookes University and of course all those companies who have supported us and provided feedback through the early stages of the programme. We will shortly be making available a range of open access learning materials on revenue management, providing a one stop resource for learning more about the fundamentals of this important discipline.

Congratulations to all our learners who successfully passed the last set of HOSPA examinations in Revenue Management and Financial Management held in July - the full pass list can be found on page 15.

During the next few months we have a range of membership events on the agenda, both in London and also in Edinburgh and Manchester - turn to page 23 for all the details. The HOSPACE 2012 programme of speakers is now finalised for our annual conference held on 22nd November 2012 at the Sofitel, Terminal 5, Heathrow, London. Be sure to visit www.hospace.net for all the latest details and to reserve your place! There are scholarship places available for younger members - full details can be found on page 9.

Come and join us - we look forward to meeting up with our members over the coming months!

Debra Adams

Editor | debra.adams@hospa.org

Sponsor of The Overview



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HOSPA

Hospitality Finance, Revenue and IT Professionals

BAHA Moving Forward

Editor

Debra Adams
+44 (0) 1202 842809
debra.adams@hospa.org

Editorial Board

Diana Mountain, Finance & Accounting Committee

Bryan Steele, Information Technology Committee

Warren Mandelbaum, Revenue Management Committee

Alec Jones, Taxation Committee

Membership, Subscriptions & Events

Rob Maloney, Membership Officer
rob.maloney@hospa.org

Wayne Gosden, Membership Services & Events Marketing
wayne.gosden@hospa.org

Education Coordinator

Jane Scott - jane.scott@hospa.org

Publisher

The Overview is published by:
Hospitality Professionals Association
Suite 6, Merley House Business Centre
Merley House Lane
Wimborne
Dorset
BH21 3AA
+44 (0) 1202 889430
www.hospa.org

Design and Production

Unstuck Design Ltd
Renshaw Barns
Upper Woodford
Salisbury
Wiltshire
SP4 6FA
hello@unstuckdesign.com
+44 (0) 1722 782873
twitter.com/unstuckdesign

Printer

Dorset Digital Print
16 Glenmore Business Park
Blackhill Rd
Holton Heath
Poole,
Dorset
BH16 6NL
+44 (0) 1202 332 044

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Mr Fabrice Rambert

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



The Key to Security Success

Chaos descended at the Marriott in Denver on the stroke of midnight on New Year's Eve as guests at the 628-room hotel were locked out of their rooms after their electronic key cards stopped working - for a staggering three hours. Denver police were called when fights broke out amongst frustrated guests. Whilst this is an extreme example, a door access system not working correctly causes a lot of disruption to a hotel and its guests, but hopefully will not always result in fighting!

The first mechanical reprogrammable card lock was invented in 1976 by Tor Sørnes, who had worked for VingCard since the 1950s. The first card lock was installed in 1979 in the Westin Peachtree Plaza Hotel, Atlanta, USA. This product triggered the evolution of electronic locks for the hospitality industry that we all take for granted every time we open a bedroom door in a hotel.



Andrew Evans
Managing Director

Andrew Evans is Managing Director of Keystep who are proud to be HOSPA patrons.

Andrew has over 20 years experience and is a specialist in supporting technology in the hospitality sector. Keystep supports all types of EPoS and access control systems for the hotels in the UK and beyond. He can be contacted via andrew.evans@keystep.org or visit www.keystep.org for more information.

Magnetic cards or RFID tags are incredibly flexible and can be programmed for an individual for a specific period of time, making the card or tag invalid for use after the guest has checked out. An electronic locking system supports access to specific areas, and places restrictions based on each person's need, whether they are paying guests, visitors, workmen or employees.

Guests can be confident in learning that no personal information or data is stored on magnetic key cards; they are simply a coded algorithm which is encrypted and cannot be read by any other locking system. A card that works in one hotel will not open a door in another, as each establishment has a unique master system code.

Although there have been massive leaps in technology, the magnetic key card is still king and continues to be used by the majority of hotels in the UK. This is primarily because it is incredibly expensive to change every door lock in order to implement a newer system, and this continues to be the barrier to advances in new technologies such as guests using mobile phones to open their hotel room, for all but a small percentage of hotels in the UK.

Hotel guests want to feel safe and secure in their temporary home, and hotels have a duty to protect them. Good security benefits everybody; hotel guests, staff and managers. When all staff take security seriously as a service, the result is a well run, efficient hotel with an excellent reputation and booming business. Security should not be seen as an overhead, but as a value-added guest service, just like the bar, restaurant, leisure club or turn-down service. Good security will promote a hotel as a safe haven and secure environment.

Support companies such as Keystep have seen an increase in enquiries over the last year from hotels wanting help and advice to ensure they are following best practice. Many enquiries have come after an incident or breach in security including thefts from hotel bedrooms. Security experts warn theft from guest's rooms is on the increase due to the wide array of gadgets and devices people now travel with, such as laptops, tablets, and mobile phones, in addition to the good old favourites: passports and cash.

Many hotels see the door access system as a facility to simply let guests into their rooms, and they do not actively manage the system in an effective way. Confusion lies in the fact the door entry system is part mechanical and part IT system and questions over who takes responsibility is often raised - Is it maintenance? Front desk? Or the IT department? The reality is that often, no single department takes full responsibility for this mission critical system. A change in thought process that "it's just a system for letting guests into rooms" is required as the reality is that a door locking system is probably one of the most critical systems you have in your hotel after power and water!

Key Advice

Andrew Evans, MD of Keystep offers some simple advice to enable hotels to harness the best security measures.

Entrance and Exits

Minimise the number of entrances - one is preferable, although not always possible. Reducing the entrances allows owners, management and staff to monitor who is entering and leaving the hotel.

Emergency exits should be alarmed so that staff will be immediately notified if the door is opened or tampered with. Signs to this effect should be placed on emergency doors

Staff Access Levels

Make sure staff only access the areas of the hotel they need and only at the required times they should. Avoid giving all staff full access to every area at all times. When staff leave the business, make sure you get their access card/tag back and cancel their access. Record the details in a log in case you have to investigate any future incidents.

What Time Is It?

Ensure the time is correct on all the locks in the property. If you are in the UK you may have to set the time in your locks twice a year to cope with BST and GMT. If the time is incorrect, any log information stored about who has used a lock will be confusing, if not useless, in the event of an incident.

Emergency Access Cards

Every door entry system has emergency pre-made cards that can be used should a system fault or a power cut prevent the cutting of room keys. Always keep emergency key cards available and have a manual process in place for issuing the cards in the event of an incident. It is worth practicing the drill with staff in the same way you have a fire drill.

On some systems, emergency cards expire after a period of time so it's critical to check they work every 6 months.



Well Maintained

Basic maintenance is essential. Many electronic locks have batteries that should be changed regularly as flat batteries can cause the lock to lose its programme. Cleaning of the magnetic card reader will ensure guests are not fumbling to get into their rooms. Housekeeping should report any lock issues and clean the reader every month.

Master Keys

The traditional mechanical master key should be kept locked away in the safe at all times. Lost master keys will require the recoding of all key barrels in the locks of the hotel - a time consuming and laborious task.

Cards

Hotels that enhance their brand by using printed guest key cards or access tags should ensure staff cards are plain. This way any lost cards cannot be linked to the hotel. Any staff cards that are lost should be cancelled and details recorded in a log in case you have any incidents in the hotel.

If a guest hands a card back saying it doesn't work, destroy the card and use a new one. Like everything, the magnetic cards wear out over time and lose their magnetism.

HFTP Global Hotel Accounting Users Guide Project



An update from Howard Field regarding the latest progress on this exciting project for the hotel industry.

Readers will know that the Hospitality Financial and Technology Professionals (HFTP) initiated this project

to create a global resource for the hospitality finance industry, this past March. Recognising that operating hotels is a global industry, HFTP determined that there is not a globally accepted method that financial professionals, ownership structures, investors and benchmarking information services can use to support efficient operations and monitor investment performance from region to region without significant assumptions and data mining.

The hotel sector currently enjoys the benefits of an accounting structure developed in the USA specifically for the industry. The Uniform System of Accounts for the Lodging Industry has been widely adopted, principally by US based operating companies, and linked to management contract terms. HFTP has been involved in this project for many years and will continue to sponsor the 11th edition in both support and via a monetary contribution.

The Global Hotel Accounting Standards Guide will provide for a wider community of information users, and demonstrate approaches to the production of alternative analysis of data for hotel performance measurement.

The first phase involves conducting research into current practices to identify who is doing what in different parts of the world, to establish best practice and to provide practical tools for students, practitioners and professionals involved in the industry.

Under the guidance of leading hospitality accounting consultant and author, Howard Field, and Professor Ian Millar (as a member of HFTP's Board of Directors), student research teams participating in the HotelSchool Lausanne Strategic Business Project scheme covered hotels in the UK, Ireland and continental Europe. This took place between March and June. Frank Wolfe and Howard Field attended the formal project presentations at the hotel school, for which academic credits were awarded to the students.

The École Hôtelière de Lausanne (EHL) students have created a comprehensive database of charts of accounts from the participating hotels, and an outstanding dictionary of revenue and expense items which will become the cornerstone of the HFTP project outcome. This has a working title of the 'Indexation'. Further data relating to capital/expense rules and treatment of specified items was recorded, and recommendations made for account numbering systems.

All of the students are non-accountants and at the end of their involvement they have materially raised their knowledge about hotel operational information and how it is compiled. An opportunity was provided for direct contact with hotel financial managers, this included visits to hotels where they could ask questions and see how the data they were reviewing fitted with a live operation.

The project for Central and South America began in late June 2012 and while significant communication has been sent out to various contacts, the process of obtaining responses has been a bit slower than anticipated. Initial data requests have also been sent out to alumni for The University of Houston Hilton College of Hotel Restaurant Management; industry contacts and HFTP members currently working in Central and South America. To date there have been responses from three groups, with their input incorporated into the database set up for this region.

This latter work group is led by Arlene Ramirez, a private consultant; Tanya Venegas, Director of the HFTP Research Institute and three graduate students. The goal is that the students would assist in the input and review of the data as was the case at EHL.

In order to accelerate the process a bit more, HFTP are currently working on forming a partnership with the Universidad San Ignacio de Loyola (USIL), Lima, Peru, to setup a format that would mirror what EHL accomplished in Europe. Steve Hood of Smith Travel Research has been working with the university on several projects and the goal of this is to become the premier hospitality program in South America. Aligning our project with the school would provide more resources and yield a product that would hopefully mirror the efforts achieved in Europe.

A progress meeting took place between Frank Wolfe, Howard Field and Arlene Ramirez during HITEC. Aspects of the data collected to date and how this will be managed by HFTP were discussed.

The next regions to be covered will be Asia and India. Asia is to be set up by Howard Field in September, with students from the Hong Kong PolyUniversity, local support from the Hotel Controllers & Accountants Association (HCAA) and Horwath HTL. HFTP have an established relationship with the PolyUniversity, and entered into a formal affiliation relationship with the HCAA in November 2010.

During the balance of this year, planning for securing input from the remainder of the regions will be established, as well as how the reviews of the research data will be undertaken by industry experts.

For more information on the contents of this article, please email Howard Field at hf@howardfield.com.

Top Hospitality Industry Executives Named for 'Leaders Panel' at HOSPACE

'Taking the Investment Forward – Making the Most of the Investment in Your People and Business to Create Value' is the title of HOSPACE 2012, HOSPA's Annual Conference and Exhibition for Hospitality Finance, Revenue Management, IT and Commercial Professionals to be held on 22nd November at the Sofitel London Heathrow, Terminal 5.

HOSPA is delighted to announce the prestigious line-up of top hospitality industry executives who have agreed to participate in a special 'Leaders Panel' discussion at HOSPACE 2012.

Putting the current hottest hospitality issues, trends and developments under the microscope will be: HOSPA President Robert Cook, Chief Executive of De Vere Hotels & Village Urban Resorts; Surinder Arora, Founder and Chairman of Arora Hotels; Grant Hearn, Chief Executive, Travelodge; Angela Vickers, Managing Director, Apex Hotels; and Stephen Cassidy, Area Vice President at Hilton Worldwide.

Under the skilful guidance of HOSPA Chairman Paul Dukes – also Chairman at Kew Green Hotels – the Leaders Panel will help set the scene for the conference and exhibition, examining subjects ranging from the impact, both present and future, of the UK and global economies; the legacy of the UK's summer's events; the latest legislation and the need for even stronger Government support – particularly a significant VAT rate reduction for the UK tourism sector, to meeting current guest expectations; 'best practice' revenue management; and the best use of social media, ecommerce and ever changing technology.

Commenting on the Leaders Panel, HOSPA Chief Executive Carl Weldon said: "HOSPACE 2012 is extremely pleased to welcome and benefit from such an influential and experienced team of top industry executives. They will provide delegates with a balanced and insightful view about the current and future challenges and opportunities for the UK hospitality industry; and how these can be converted into long-term gain for the profession."

In addition to the 'Leaders Panel' discussion, other highlights of HOSPACE 2012 include: a top-level Finance Panel discussion on 'Getting the wheels of Hotel Finance to turn again'; a Revenue Management session asking the question: 'What is the Revenue Management contribution to strategy and future leadership in hospitality?'; a 'Hospitality IT Debate' entitled: 'Can outsourced IT services really support the needs of Hospitality IT for both internal business requirements and guest services?'; and a programme of industry specific educational workshops – all led by top specialists in their subjects.

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.



For regularly updated information on HOSPACE 2012 (HOSPA Conference and IT Exhibition), visit the HOSPACE 2012 Website at: www.hospace.net . For bookings and further details for HOSPACE 2012, contact Wayne Gosden on telephone: 01202 889 430; fax: 01202 887 967; or email: Wayne.Gosden@hospa.org.

HOSPACE 2012

Leaders Panel



Chair

Paul Dukes

Chairman of Kew Green Hotels and of HOSPA

Paul has had an extensive career of some 37 years in the international hospitality and leisure industry in a broad range of senior positions across the sector, including

seven years City experience gained with two leading investment banks.

After a degree in Economics from the University of Sheffield, Paul qualified as a Chartered Accountant with Price Waterhouse in London. Paul moved to the hospitality sector in 1974, and spent 12 years with Trusthouse Forte in Sardinia and in Paris. Paul then became a Divisional Director of Grand Metropolitan and later, as MD of La Manga Club Ltd, developed and operated golf resorts in the UK and in Europe.

After a caretaking role as CFO of Ciga Hotels SpA, and its subsequent sale to ITT Sheraton, he then joined HSBC James Capel as Director of Hotels & Leisure for the global investment banking group. Between 1997 and 2001 Paul was Director of Close Brothers Corporate Finance Ltd specialising in mid-market corporate finance transactions in the Hospitality & Leisure sector.

He was until recently Non-Executive Chairman of TRI, of Active Hotels, Golden Tulip (UK), Dartington Hall and Chairman Designate of The Belfry (during 2011), and currently holds a number of other industry roles including the chairmanship of Kew Green Hotels. Paul has been Chairman of BAHA (now HOSPA) since 2007.



Panel Members

Robert Cook CEO at De Vere Hotels and Village Urban Resorts and President of HOSPA

Robert Cook joined the Group in January 2012 as CEO of De Vere Village. He is a member of the Group's

Executive Board. In August 2012, Robert was also appointed CEO of De Vere Hotels and Village Urban Resorts collectively. In addition De Vere secured a Management Contract to operate The Belfry Hotel, the iconic Ryder Cup Golf Course.

Before entering the world of lifestyle and contemporary hotels, Robert spent six years with InterContinental Hotels and was part of the pre-opening team at The Balmoral Hotel in Edinburgh when it was re-launched in 1991. Robert spent three years in Monte Carlo as Managing Director of Columbus and Dakota Hotel Group. He then joined Malmaison, where he spent four years, firstly as General Manager of Newcastle and Manchester and then as Operations Director. He became Chief Executive Officer of Malmaison in 2004.

In 2006 he was awarded the Caterer and Hotelkeeper Award for Manager of the Year and in the same year Malmaison was awarded AA Hotel Group of the Year. In 2009 Hotel du Vin won the same award and for the sixth consecutive year won The Guardian Observer Business Travel Award.

He is a graduate of Robert Gordon University in Aberdeen and in 2007 received an honorary doctorate in recognition of his contribution to the hotel industry.

Robert lives between London and Northumberland with his wife, Debbie, and family. Robert enjoys outdoor pursuits, particularly golf, and is a single handicap golfer and keen shot.

Surinder Arora Founder and Chairman of Arora Hotels



Surinder founded Arora Hotels in 1999 which has since become one of the fastest growing independent hotel companies in the UK and the largest hotel company at Heathrow and Gatwick airports. The primary focus of Arora Hotels is the design, construction and operation of luxury hotels. The company has a consistent track record of delivering superlative quality, service and hospitality combined with quantum revenue and profit growth.

The portfolio currently comprises of 6 directly managed hotels with over 2,200 bedrooms and 1,500 employees. Prime locations include the award-winning Sofitel London Heathrow, Terminal 5. The property arm of the Arora Group – Arora Management Services – is involved in property asset management of a portfolio of landmark office buildings. The company recently announced that it had secured an agreement to design and construct four new budget hotels at Heathrow, Gatwick and Stansted airports.

Surinder is Patron of Royal Holloway Entrepreneurs, a student society within the Royal Holloway University of London where he has established the annual 'Arora's Den' competition and the Arora Awards for Enterprise.

Surinder is a keen golfer – so much so that he holds a minority interest in Wentworth Golf Club.

Grant Hearn Chief Executive Officer at Travelodge

Grant Hearn is Chief Executive of Travelodge, the UK's fastest growing hotel company. He is a keen advocate of tourism, skills and employment and constantly works to ensure the industry's voice is heard in Parliament.



Grant is a member of Boris Johnson's London Enterprise Panel. Consisting of representatives from London boroughs and business leaders the panel, the local enterprise partnership for London, advises the Mayor on how best to attract strategic investment to support private sector growth and employment, promote enterprise, increase skill levels and protect and enhance London's competitiveness.

Grant joined Travelodge as Chief Executive (January 2003) from Hilton UK and Ireland, where he was Managing Director for three years.

Previous to Hilton, Grant spent five years at Whitbread in senior roles, including Chief Operating Officer of Marriott and Managing Director of Travel Inn. Before Whitbread, Grant was Executive Director, Forte London. He began his career at Forte as an Assistant Hotel Manager and spent 17 years at the group in a number of roles including Assistant Manager of the George V hotel in Paris.

Grant trained at Shannon College of Hotel Management, Ireland's leading college of hotel management.

Grant is married with three children.

Angela Vickers Managing Director at Apex Hotels

Angela Vickers is Managing Director of one of the UK's leading independent 4-star hotel groups, who own and operate eight contemporary-styled hotels in London, Edinburgh and Dundee.



Angela studied accountancy at Glasgow University then joined KPMG Glasgow where she achieved CA qualification and was admitted to the Institute of Chartered Accountants Scotland in 1992.

Gaining valuable experience at KPMG, Angela then moved to Stakis Hotels and Leisure group then laterally Hilton Hotels to head up the internal audit department, where she remained for 8 years. In search of a new challenge Angela joined telecoms company Damovo in 2002, as Finance Director for its corporate services division.

In 2004, Angela returned to the hotel industry after being impressed with Apex Hotels' culture. Angela has held the position of Managing Director at the privately-owned Apex Hotels since 2005 when she was promoted from the position of Finance Director just 14 months after joining the company.

Angela is a Trustee of the charity HIT Scotland, a Scottish based charity which raises funds to support & encourage excellence in the hospitality Industry.

Angela was invited to join the International Leadership School and is currently studying for the Executive Masters in Hospitality and Tourism Leadership.

Stephen Cassidy Area Vice President at Hilton Worldwide

Steve Cassidy is Area Vice President, UK & Ireland for Hilton Worldwide. He provides strategic commercial and operational leadership to the company's multi-brand portfolio across the British Isles.



Prior to joining Hilton Worldwide in 2009, Steve forged a successful career with British Airways in a number of senior management positions across the business. These roles included Head of UK & Eire Sales for BA World Cargo and General Manager, Revenue Management for British Airways Plc.

Steve began life at Hilton Worldwide as Vice President, Revenue Management, Europe Middle East Africa, leading the revenue management team, delivering profitable returns for over 200 Hilton Worldwide managed properties.

In his current role, which he has held since September 2011, Steve oversees 55 of Hilton Worldwide's UK & Ireland portfolio. As well as properties from the flagship Hilton Hotels & Resorts brand, Steve manages the running of sites ranging from the 5 star Conrad Dublin and the upscale DoubleTree by Hilton Brand, to a range of economy focused Hampton by Hilton and Hilton Garden Inn hotels.

Date for your Diary

HOSPA Breakfast Seminar - London 7th November

Presented by 

Financial reporting and tax

– are you up to date with the latest developments?'

"CPD made easy"... everything you need to know in just 90 minutes, served up with coffee and croissants! This event is from 8.00am for a 8.30am start (finishing at approx. 10.00am) and is to be held at the PKF London Office,

Farringdon Place, 20 Farringdon Road, London, EC1M 3AP.

Registration is necessary to attend. To register, please email wayne.gosden@hospa.org with your details.



Carl Weldon, CEO HOSPA, with the 2011 winners

Career Investment Development Scholarships

We are very pleased to announce this unique opportunity to provide career development for five upcoming young people working in Finance, Revenue Management and IT in the Hospitality Industry.

The HOSPA Award offers the lucky winners the opportunity to be noticed and publicly recognised for their outstanding achievements in the work place.

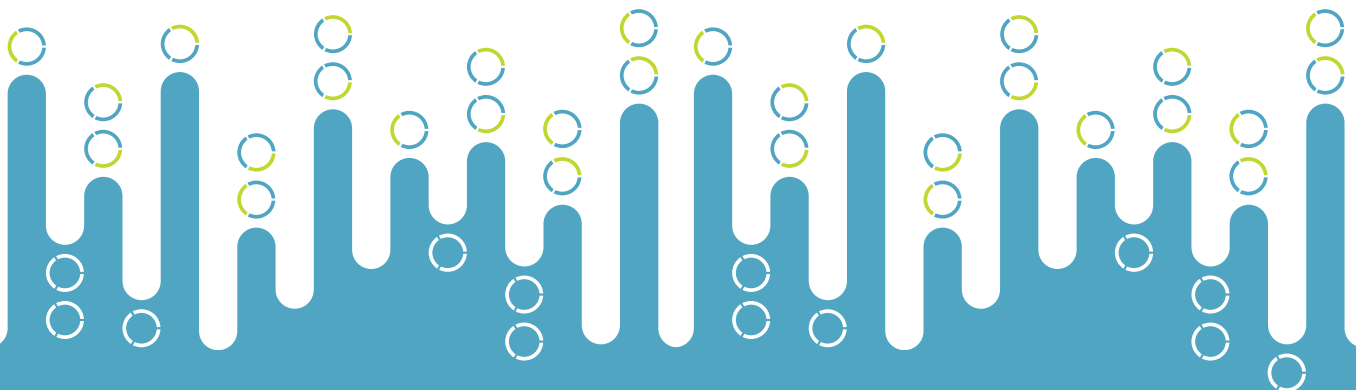
The prize comprises of a full day at HOSPACE on 22nd November 2012 plus a place at the Conference Dinner, where their achievements will be recognised. Each recipient will be featured in the Conference Edition of the HOSPA journal.

The criteria for applications are:

- **Candidates must be 30 years or younger on 19th October 2012**
- **Candidates must be employed in a hospitality organisation working in finance, revenue management or IT**
- **Candidates must have been working in the industry for a minimum of twelve months**
- **Only one application per company**
- **Applications must be accompanied by a CV and letter outlining why the candidate should be considered**
- **Candidates must be nominated by a senior manager**

Successful candidates will find that this is a brilliant networking opportunity with senior members of the hospitality where they can share knowledge and attend education workshops on the industry best practice for the future.

Closing date for nominations: 19th October 2012



The closing date for nominations is 19th October 2012 with judging taking place on 26th October 2012. All candidates will be notified on 1st November 2012. Please go to www.hospace.net/conference/hospa-scholarships to download a nomination form.

Once completed, please email your nomination to Lucy Vierbergen at Lucy.Vierbergen@hospa.org or fax: 01202 887967.



Frank Wolfe and Lisa Funk from HFTP with prize winners from HOSPACE 2011

Future Career Investment Development Scholarships

We are pleased to announce an unique networking and educational opportunity for five aspiring hospitality students who have excelled in their current studies.

The HOSPA Award provides the lucky winners the chance to be noticed by a potential future employer and to be publicly recognised for their outstanding achievements.

The prize comprises of a full day at HOSPACE on 22nd November 2012 plus a place at the Conference Dinner, where their achievements will be recognised. Each recipient will be featured in the Conference Edition of the HOSPA journal.

The criteria for applications are:

- *Candidates must be 30 years or younger on 19th October 2012*
- *Candidates must be enrolled in a full-time undergraduate course related to hospitality at a UK University or College*
- *Candidates must be nominated by their course leader*
- *A course leader can only nominate one student*
- *Applications must be accompanied by a CV and letter outlining why the candidate should be considered*

Successful candidates will find that this is an excellent opportunity to network with successful members of the hospitality industry and to attend informative workshops on industry best practice for the future.

Closing date for nominations: 19th October 2012



The closing date for nominations is 19th October 2012 with judging taking place on 26th October 2012. All candidates will be notified on 1st November 2012. Please go to www.hospace.net/conference/hospa-scholarships to download a nomination form.

Once completed, please email your nomination to Lucy Vierbergen at Lucy.Vierbergen@hospa.org or fax: 01202 887967.



Konstanze Auernheimer
Director of Marketing & Analysis

Media contacts

Konstanze Auernheimer
Director of Marketing & Analysis
STR Global
KAuernheimer@strglobal.com
+44 (0)207 922 1961

Jeff Higley
VP, Digital Media & Communications
jeff@str.com
+1 (615) 824-8664 ext. 3318

Rachael Spann Urie
Director, Public Relations
rurie@str.com
+1 (615) 824-8664 ext. 3305

STR Global reports Europe hotel pipeline for July 2012

The Europe hotel development pipeline comprises 898 hotels totalling 145,692 rooms, according to the July 2012 STR Global Construction Pipeline Report.

Among the markets in the region, London, United Kingdom, ended the month with the largest number of rooms under construction with 3,939 rooms. Five other markets reported more than 900 rooms in the In Construction phase: Moscow, Russia (2,167 rooms); Berlin, Germany (1,912 rooms); Amsterdam, Netherlands (1,469 rooms); Vienna, Austria (947 rooms); and Cologne, Germany (931 rooms).

STR Global: Europe hotel results for July 2012

The European hotel industry posted mixed results in year-over-year metrics when reported in U.S. dollars, euros and British pounds for July 2012, according to data compiled by STR Global.

Year-over-year, July 2012 figures for Europe (U.S. dollars, euros and British pounds):

	Europe	% change
Occupancy	71.7%	-2.3%
ADR (U.S. dollars)	\$134.33	-8.8%
ADR (euros)	€109.45	+7.0%
ADR (British pounds)	£85.51	-4.6%
RevPAR (U.S. dollars)	\$96.27	-10.9%
RevPAR (euros)	€78.44	+4.5%
RevPAR (British pounds)	£61.29	-6.8%

Source: STR Global

“European hotels reported a solid increase in average room rates for the month of July when measured in euro terms (+7.0 percent). However, this is coupled with the third consecutive month of small occupancy declines”, said Elizabeth Randall Winkle, Managing Director of STR Global. “With the Olympic coverage taking over a bit from the ongoing troubles in the eurozone, London (U.K.) hoteliers reported weaker occupancy performances in June and the non-Olympic days in July compared to last year. We receive monthly results from more than 422 hotels in London and results for July reflect that the first four days of the Olympics during July, could not offset the weaker occupancy in the early part of the month. London reported 80.7 percent occupancy (a decline of 11.1 percentage points) and £166.34

average room rate (+8.8 percent) compared to July 2011. This occupancy result for July 2012 still puts London into the top eight out of 31 European capital or gateway cities, which we track on our European Hotel Review. Given the most of the Olympic events occurred in August, a bigger impact, especially in ADR terms, should be visible in London's August results".

Highlights from key market performers for July 2012 include (year-over-year comparisons, all currency in euros):

- Bratislava, Slovakia, reported the largest occupancy increase, rising 19.5 percent to 51.2 percent, followed by Vilnius, Lithuania, with a 10.6-percent increase to 78.7 percent.
- Two markets experienced double-digit occupancy decreases: London (-12.1 percent to 80.7 percent) and Istanbul, Turkey (-10.6 percent to 72.7 percent).
- Five markets achieved ADR increases of 15 percent or more: Reykjavik, Iceland (+26.1 percent to EUR129.63); Tel Aviv, Israel (+22.4 percent to EUR205.15); London (+22.1 percent to EUR212.91); Manchester, U.K. (+18.5 percent to EUR80.76); and Istanbul (+15.0 percent to EUR176.84).
- Geneva, Switzerland (-15.1 percent to EUR242.25), and Zurich, Switzerland (-11.5 percent to EUR183.69), ended the month with the largest ADR decreases.
- Reykjavik grew 32.2 percent in RevPAR to EUR119.54, achieving the largest increase in that metric.
- Geneva fell 21.5 percent in RevPAR to EUR160.65, reporting the only RevPAR decrease of more than 20 percent.

Performances of key countries in July 2012 (all monetary units in local currency):

Country	Occupancy	% change	ADR	% change	RevPAR	% change
Germany	68.0%	+1.9%	EUR84.43	+0.9%	EUR57.42	+2.8%
Italy	66.1%	-2.0%	EUR145.39	+2.4%	EUR96.04	+0.3%
Russia	67.1%	+8.8%	RUB4,444.14	+1.8%	RUB2,983.36	+10.8%
Spain	72.7%	-1.9%	EUR95.24	+6.8%	EUR69.25	+4.8%
United Kingdom	77.5%	-6.2%	GBP88.69	+4.9%	GBP68.74	-1.6%

*percentages are increases/decreases for July 2012 vs. July 2011

STR Global: Great Olympics benefitting London hoteliers

London hotels reported increases in average daily rate and revenue per available room during the 2012 Olympic Games, according to STR Global, the leading service provider of market information to the hotel industry. The games started with the opening ceremony Friday, 27 July 2012 and ended Sunday, 12 August 2012.

Hoteliers across London reported average occupancy of 88.5 percent and ADR of £212.22. This represents an increase of 4.8 percent and 86.1 percent, respectively, compared to the same days the year prior. STR Global tracks daily performance from more than 390 hotels in London and 2,400 hotels across the United Kingdom overall.

"The London 2012 Olympic Games have provided great sporting moments and a very enjoyable atmosphere for athletes and spectators alike", commented Elizabeth Randall Winkle, Managing Director of STR Global. "The smooth running of the event and its positive coverage to a global TV audience will encourage more visitors to come to London in the future".

Olympic Period (27 July – 12 August)

London submarkets	Occupancy (%)		Average Room Rate (£)		RevPAR (£)	
	27 Jul to 12 Aug	% change	27 Jul to 12 Aug	% change	27 Jul to 12 Aug	% change
London overall*	88.5	4.8	212.22	86.1	187.77	95.0
Docklands/Greenwich	95.0	9.0	136.63	69.8	129.81	85.1
Earls Court/Kensington/Chelsea	87.0	4.1	204.67	89.9	178.16	97.7
Knightsbridge/Pimlico/Victoria	91.2	17.8	353.59	104.0	322.48	140.3
London North/Camden	90.1	5.5	202.00	93.3	181.97	103.9
London South	89.8	-2.9	184.91	73.2	166.11	68.2
London West End	91.2	15.0	313.48	91.1	285.80	119.7
Outer London	81.4	-6.5	105.29	70.3	85.69	59.3
Paddington/Bayswater	91.1	2.2	171.84	65.1	156.50	68.8
The City/Shoreditch	87.1	-0.7	158.13	77.7	137.80	76.4

*Editor's note: The daily data for this article was extracted on 16 August. Occupancy reported to STR Global is based on physically occupied rooms, which means any paid and unoccupied rooms are excluded.

Source: STR Global

The follow-up performances during the Olympics and Paralympics

London	Occupancy	ADR	RevPAR	RevPAR % chg
Olympics (27 July to 12 Aug)	88.5%	£212.22	£187.77	+95.0%
Paralympics (29 Aug to 9 Sept)	88.1%	£134.26	£118.28	+3.3%

Source: STR Global

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Pub and restaurant groups see Olympics sales boost for London

- *Collective like-for-like sales up 5% in August in the Capital*
- *But, no such cheer outside the M25*

Pub and restaurant groups benefitted from an Olympics sales boost – but only in London. Latest data from the Coffer Peach Business Tracker, the industry’s sales barometer, reveals contrasting fortunes for operators inside and outside the M25.

While combined like-for-like sales for August increased 5% inside the M25, they were ahead a more modest 1% outside of London compared with the same month last year. Those regional figures translate to a 2.1% like-for-like sales increase across the country as a whole for the month.

“The Olympics were undoubtedly the big factor helping big name chains in London, although August also marked the anniversary of the riots in London and other British cities,” said Peter Martin of Peach Factory, the business intelligence specialist that produces the sector Tracker, the sector’s biggest and most comprehensive performance barometer, in partnership with Coffer Group, Baker Tilly and UBS.

“The nature of the 2011 riots meant that although certain specific urban areas were severely affected, the overall eating and drinking out market came out of August last year relatively unscathed, thanks in part to a late month bounce back. Overall monthly sales were actually up on 2010, according to Tracker figures, so any change this year is more likely to be Olympics influenced,” explained Martin.

“So although, the rest of the country may not have received the same Games dividend as the Capital, the major pub and restaurant chains will not be too disappointed. An overall 2.1% like-for-like sales increase may not be scintillating, but it gets the market back in-line with the underlying growth rate, and is an improvement of the 0.2% market decline in July and the more modest 1.3% increase in June. The year-on-year like-for-like rate is currently running at around 2%,” added Martin.

“London pubs seemed to benefit most from the Olympics activity, with like-for-like growth approaching 6%. While casual dining chains in London may have been up only 2.8% against last August, it at least reversed a recent trend of falling like-for-likes inside the M25, where restaurant groups have been generally struggling against increasingly intense and diverse competition,” observed Martin.

“The Olympics brought a different sort of visitor into the Capital and brands are the businesses that seemed to benefit.”

Total sales across the 25 companies in the Tracker sample were overall up by 6.2% on last August, including a 10.5% increase inside the M25 and a 4.6% gain outside, reflecting the increasing market-share that major chains are continuing to win in the domestic eating and drinking out market as they open more sites.

The Coffer Peach Tracker* industry sales monitor for the UK pub and restaurant sector collects and analyses monthly performance data from 25 operating groups, representing combined annual turnover of over £6 billion, and is recognised as the established industry benchmark.

Monthly sales: National	
Total year on year sales growth	6.2%
Like for like sales growth	2.1%
Monthly sales: Inside M25	
Total year on year sales growth	10.5%
Like for like sales growth	5.0%
Monthly sales: Outside M25	
Total year on year sales growth	4.6%
Like for like sales growth	1.0%

Pub and restaurant group monthly sales performance for past 12 months

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
LFLs	2.8%	0.9%	2.1%	9.9%	-2.1%	-3.7%	1.9%	-2.0%	2.6%	1.3%	-0.2%	2.1%
Total	6.9%	5.1%	6.2%	13.7%	2.2%	0.6%	6.3%	1.9%	6.5%	5.0%	3.6%	6.2%

Coffer Peach Business Tracker is powered by Demographix

For more information please contact
 Peter Martin, Peach Factory | 01704 550383; 07889 209896 | peter@peach-factory.com



HOSPA Education Programme: February 2012 Successful Learners

Following the HOSPA Examination Board, held Wednesday 29th August, HOSPA would like to congratulate the following learners for successfully completing the relevant stage of their studies - well done!

ETP Financial Management Stage 1

Aleksandra Hibner	Old Government House Hotel
Anne Alexander	JW Marriott Hotel Dubai
Bhavika Vanjani	Jumeirah International LLC
Craig Burns	Webb Travel & Moor Hall Hotels
Edison Rocha-Rojas	Starwood Hotels
Emilia Mielnicka	The Cadogan Hotel
Jolanta Pieczulis	Jurys Inn Sheffield
Krzysztof Suhak	The Palace Hotel
Louise Ayres	The Park Lane Hotel
Louise Findlay	Whitbread Hotels and Restaurants
Maya Schutzova	St Ermin's Hotel
Nicola Janet Shallcross	Principal Hayley Cranage Hall
Osarogie Eghosa Ukponmwan	St Ermin's Hotel
Peter Koon Soon Oon	Mandarin Oriental Hyde Park
Rebecca Raeburn	Dullatur Golf Club
Sylvia Bukowska	The Met Hotel, Leeds

ETP Financial Management Stage 2

Gemma Gowers	Yotel
Judith Marx	Hotel Pulitzer/Sheraton Amsterdam
Laura Tecuceanu	Radisson Blu Waterfront Hotel
Luca Basilico	Wyndham Grand London
Paul Steenson	Marriott Glasgow
Peter Koon Soon Oon	Mandarin Oriental Hyde Park
Stephanie Quinto	Jumeirah Beach Hotel
Suzanne Taylor	No. Ten Manchester Street Hotel
Svetlana Simcenoka	Legacy Rose & Crown Hotel

ETP Financial Management Stage 3

Caroline Reid	Principal Hayley Beaumont House
Constantijn Schouten	Trafalgar Hilton
Josie D'Cruze	Sheraton Heathrow Hotel
Laura Tecuceanu	Radisson Blu Waterfront Hotel
Malgorzata Du Plessis	Royal Berkshire Hotel Ltd
Nina Peuser	The Park Lane Hotel
Rachid Ouahmane	Firoka (Kings Cross) Ltd
Robert Gerhardt	Jumeirah Madinat
Sarah Kundi	Brown's Hotel
Tatjana Djogo	Mandarin Oriental Hyde Park
Zaw Zaw Lwin	Ramada London Hyde Park

ETP Revenue Management Stage 1

Claire Lawler	Whitbread Hotels and Restaurants
Craig Shepherd	Whitbread Hotels and Restaurants
Emma Smith	Whitbread Hotels and Restaurants
James Robson	Thistle Marble Arch
Julian Punch	Whitbread Hotels and Restaurants
Leona Craddock	Whitbread Hotels and Restaurants

ETP Revenue Management Stage 2

Christina Willey	Whitbread Hotels and Restaurants
Emma Smith	Whitbread Hotels and Restaurants
Jo-Anne Stewart	Whitbread Hotels and Restaurants

New Associate Certified Members

Congratulations to the following learners, now HOSPA Associate Certified Members, for successful completion of the ETP in Financial Management over the last year, from August 2011 to August 2012.

Robert Gerhardt	Jumeriah Madinat
Caroline Reid	Principal Hayley Beaumont Estate
Ricarda Neims	St James's Hotel and Club
Ian Millington	Principal Hayley Wotton House
Aleksandra Stavridis	Red Carnation Hotels
Leonardo Yecguanchuy	Red Carnation Palm Beach Hotel
Karen Armstrong	Radisson Blu Hotel Durham
Manoj Gaikwad	Hilton London Heathrow Terminal 5
Kevin Moseley	Village Hotel Group
Elena Popova	De Vere Wakefield Park
Mohamad Zayour	Sheraton Skyline Hotel & Conference Centre
George Kimani	Wyndham Grand London
Facundo Doce Cano	Rezidor Park Inn Southend-on-Sea
Axel Dormans	Formerly Hotel Monte Carlo Beach
Philip Littlefair	Principal Hayley Palace Hotel Manchester
Dianne Mackenzie	Radisson Blu Glasgow
Ron Wagemakers	Sloane Square Hotel
Nasreen Alidina	Millennium & Copthorne Chelsea
Louise Coleman	Firoka (Heythrop Park) Ltd
Pascal Ho	The Westin Dublin
Ikram Saleem	Burj al Arab
Susan Marsh	Radisson Blu Portman Hotel
Adrian Orton	Chesford Grange Hotel

Well done Saman Weerasinghe!

Congratulations to Saman Weerasinghe, currently embarking on Stage 3 of the HOSPA Financial Management programme, who has recently been promoted from Cost Audit Manager to Management Accountant after gaining the knowledge he needed to advance in his career. Commenting on his promotion, Saman told HOSPA that studying on the Financial Management course had given him the knowledge and confidence he needs to perform his new role.

HOSPA *Annual Awards Lunch*

Park Plaza Westminster Bridge, London | Wednesday 19th December 2012



Get in the Christmas spirit with HOSPA and enjoy the Association's Annual Awards Ceremony, celebrating hospitality's best practitioners in finance, revenue management and IT, as well as the most successful learners of the year from the HOSPA Education and Training Programmes.

Tickets on sale in due course. Contact Wayne Gosden on 01202 889430 or email Wayne.Gosden@hospa.org for more details.

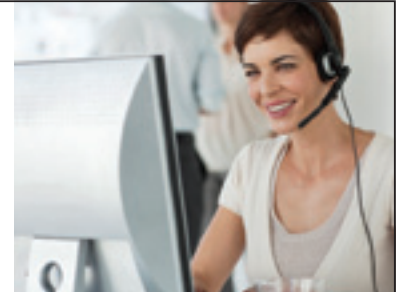


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Member's News

The first HOSPA members meeting for the autumn season took place at the Park Lane Hotel, London on 11th September 2012.

Members and guests gathered to hear an update on Immigration and Employment issues for the hospitality industry from employment law experts and HOSPA patrons Watson, Farley & Williams.

The speakers, Asha Kumar, Partner and Devan Khagram, Associate, provided the audience with a very comprehensive update on the current compliance regime with regards to immigration categories and the checks that employers are expected to do. With the use of various cases the employment

law considerations for employers were discussed focusing on a sample of immigration issues that can arise with employees.

A comprehensive guide to the issues was distributed to attendees and a copy of the slides can be downloaded from the member's area of the HOSPA website.

For further information contact Asha Kumar at AKumar@wfw.com, who specialises in contentious and non-contentious employment law issues, or Devan Khagram at DKhagram@wfw.com, who is the co-author of the Immigration chapter of the UKTI's "Investors Guide to the UK" publication.

Our thanks to Watson, Farley & Williams for organising this event and to our hosts at the Park Lane Hotel, London.

Debra Adams

Hospitality Guild Launches Apprenticeship Awards News



The Hospitality Guild is launching a new apprenticeship awards programme which recognises and celebrates the achievements of apprentices working in hospitality in England and also emphasises the critical role employers, providers, and mentors play in the delivery of apprenticeships.

Suzy Jackson, Executive Director of the Hospitality Guild, explains that without the commitment of businesses and their teams, apprenticeships simply could not be offered to those seeking to build their careers on the job. "It's high time that the role of organisations that fund, train and employ apprentices is recognised for their contribution to growing a new generation of hospitality professionals."

Following the structure of current apprenticeship programmes, the awards, which are being held in partnership with sector skills council People 1st, identify the hospitality industry's potential stars at different levels of their career journey. Award categories have also been created for companies.

There is no charge to enter the awards, nominations must be submitted by 12 October 2012 and individuals or businesses can enter in the following categories:

- **Intermediate Apprentice of the Year**
- **Advanced Apprentice of the Year**
- **Apprenticeship Mentor of the Year**
- **Employer of the Year: SME (less than 250 employees)**
- **Employer of the Year: Large (more than 250 employees)**
- **Partnership of the Year**

Suzy continued, "We're witnessing a huge growth in the numbers of people completing apprenticeships. In the last year alone, nearly 15% more people completed an apprenticeship

with a hospitality employer. Over 26,000 people dedicated themselves to a programme of training while at work and tens of hundreds of companies have made these opportunities possible. The winners of the Hospitality Guild Apprenticeship Awards will be announced in December at a prestigious event to be held at the House of Commons, alongside the Hospitality Guild's Young Hall of Fame which collectively showcases the initiatives and awards of the Guild's partner organisations.

About the Hospitality Guild

Founded in 2012, with co-investment from the UK Commission for Employment and Skills, and the blessing of Skills Minister John Hayes, the Guild's partner organisations include the Academy of Culinary Arts, ACE (Association of Catering Excellence), A.I.C.R. (Association of Front Office Managers), Academy of Food and Wine Service, the British Institute of Innkeeping, Craft Guild of Chefs, FCSI (Foodservice Consultants Society International), HOSPA, the Institute of Hospitality, LACA (Local Authority Caterers Association), Master Chefs of Great Britain, the National Skills Academy for Hospitality, People 1st, PACE (Professional Association of Catering Education), Springboard UK, the UK Housekeepers Association, The Restaurant Association, TUCO (The University Caterers Organisation), and the Worshipful Company of Innholders. Collectively, they represent over 80,000 employers and individual members.

More information about the awards and nomination forms can be found on the Hospitality Guild website at www.hospitalityguild.co.uk/awards. If you have a question about the nomination process or judging criteria, please contact Ruth Asker-Browne on 01895 817000 or email ruth.asker-browne@people1st.co.uk alternatively please contact Natalie Angel on 01895 817053 or 07920 087594 or email natalie.angel@people1st.co.uk.

HOSPA Sponsors & Patrons

We are delighted to welcome three companies as HOSPA Sponsors and Patrons - Cardonet, Davidson Asset Management and ENER-G.



Cardonet

Founded in 1999, Cardonet offers flexible IT support, professional IT project delivery and expert IT advice to businesses throughout the UK. Specialising in providing IT services to the hotel, hospitality & leisure sectors, Cardonet is committed to genuine vendor independence and industry-leading service innovation. Cardonet Director Sagi Saltoun said "As we specialise in providing IT services to the hospitality sector, it is very important for us to make sure we are at the heart of the industry. HOSPA is a very proactive association with energy and ideas, and we are delighted to be able to support their work in this way. HOSPA has a very clear vision for its role in the industry and we look forward to playing an active part in helping them to achieve this."

The sponsorship deal will see Cardonet offer some free consultancy services to member organisations, as well as take an active role in topical industry discussions & regional membership meetings. Isaac Heinrich, Cardonet Director, believes this is an important aspect of the sponsorship: "As an association, HOSPA is leading the way in terms of training & development, as well as lobbying on behalf of the industry and engaging with the wider finance and technology communities. This approach is creating an excellent platform for informed debate and the sharing of best practice. These are things that we believe passionately in at Cardonet, and by becoming a Gold sponsor of HOSPA we are able to use our knowledge & experience to hopefully add real value to industry discussions."



Davidson Asset Management

Davidson Asset Management has been established for over ten years in response to an increasing demand for informed and independent advice in the field of financial affairs. The increasing complexities within pensions and other employee benefits has meant organisations require expert guidance to ensure adherence to legislative changes and robust tailored solutions to meet their and, just as importantly, their employees' objectives.

We are privileged and delighted to be classed as a valued partner by many industry leaders within the hospitality industry. As an award winning and leading employee benefits consultancy within the sector we pride ourselves on understanding the latest issues which our client partners are experiencing.

The companies Key Services include:

- **Securing significant savings on pension through salary exchange projects**
- **Maximising Rol from review of life assurance and ancillary benefits without compromising quality**
- **Pension auto-enrolment assistance and implementation**
- **Increased employee engagement - on pension & associated benefits through 1:1 meetings**



ENER-G

ENER-G offers a wide range of energy services and sustainable technologies to generate, buy and manage energy. We help our customers with every aspect of energy management, from the formation of energy and carbon strategies, to meeting environmental objectives. We are dedicated to identifying and delivering bespoke solutions to reduce energy consumption, carbon emissions and costs.

In addition, ENER-G designs, delivers and finances a range of energy efficient, sustainable and renewable technologies.

Our on-site energy generation solutions include combined heat and power, heat pumps and anaerobic digestion systems, whilst our building energy management controls help improve efficiency and deliver operational savings.

To mark their sponsorship with HOSPA, Cardonet are offering a free day of IT consultancy to any HOSPA member organisation until 25th October 2012. To take advantage of this offer, please contact Matt Kelly, Marketing Director, on 0845 699 2444 or matt.kelly@cardonet.co.uk.

If you would like more information about HOSPA Patronage and sponsorship please visit our website at:

<http://www.hospa.org/en/solutions/become-a-sponsor/>

Crowne Plaza in Chester Rolls out EPoS Upgrade

EPoS solutions provider Keystep Limited is currently rolling out new hardware to several Crowne Plaza and Holiday Inn Hotels operated by Queens Moat House in the UK. The latest site undergoing the hardware refresh is the Crowne Plaza in Chester.

The upgrade was prompted by QMH's desire to replace its ageing hardware, but the new hardware needed to be flexible enough to operate its existing legacy EPoS software, and its new cutting edge EPoS solution. The range of KeyPOS hardware selected allowed for backward compatibility, whilst also offering outstanding performance. The KeyPOS terminals are rugged and compact with a slim design catering to a wide variety of applications for the retail and hospitality sectors. Adapting Intel's latest technology, the KeyPOS terminal is a fanless and power efficient solution offering uncompromised reliability and robustness.

Commenting on the upgrade, Managing Director of Keystep Andrew Evans confirms **"Keystep have worked with QMH for several years and the hardware upgrades have led to a dramatic decrease in the number of support calls, and the improvements in system reliability have helped QMH concentrate on the guest experience - and for a hotel group that's what it's all about"**.

This latest roll-out follows a number of successful site upgrades under a contract awarded in July 2012.



About Keystep Limited

Keystep celebrates its 9th year of trading and supports all types of EPoS and access control systems for hotels and retail units in the UK and beyond. As one of the UK's top suppliers of specialist EPoS solutions, Keystep caters for Bars, Restaurants, Nightclubs, Hotels and Shops of all sizes. Understanding that providing a POS System is not a one-off transaction has accrued long standing relationships with clients such as Queens Moat House, Malmasion Hotels, Principal Hayley, Hotel Du Vin and Tiger Retail.

For more information, please visit www.keystep.org.

"Our partnership with **Cardonet** means that they help us carry out IT projects and system upgrades while working around the clock to minimise downtime."



"Cardonet's flexibility has proved invaluable."

"Cardonet's first rate support team have not failed us yet."

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At **Cardonet**, we specialise in providing IT services to the hospitality sector. The application of technology throughout the industry is changing every day, and HOSPA takes a lead role in enabling debate and empowering industry professionals to discuss & apply innovation and establish best practice.

This is why we are proud to have become a HOSPA Gold Sponsor, and to mark our sponsorship we are offering a **free day's consultancy** to any HOSPA member organisation. Call us today to find out more.

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UK CHAIN HOTELS MARKET REVIEW - July 2012

London hotels lose out in July but the seeds are sown for a bright future

It was an inevitable consequence of the capital hosting 'the greatest show on earth' that headline performance levels would see a dip, and with record occupancies achieved during the same period in 2011, the results were never going to be pretty this month, according to the latest HotStats survey of approximately 560 full-service hotels across the UK by TRI Hospitality Consulting.

Despite the 6.3% year-on-year increase in achieved average room rate in July, to £159.26 from £149.80, the year-on-year movement in Revenue per Available Room (RevPAR) was negatively impacted due to a 10.2 percentage point decline in room occupancy.

Somewhat surprisingly, the decline in demand in London was not in the commercial sectors as initially predicted, but due to a drop in the proportion of demand attributed to the leisure and group tour sectors, which declined to a cumulative 29.8% of total demand from 39.5% of demand during the same period in 2011 as tourists stayed away.

Whilst this may in part be due to the particularly high visitor numbers in July 2011 as a result of the timing of Ramadan, travel companies clearly, and understandably, shifted their focus to selling high-yielding Olympic-related tours this summer, as the rate in this sector increased by 57.4% to £153.82, despite the drop in volume in the group segment.

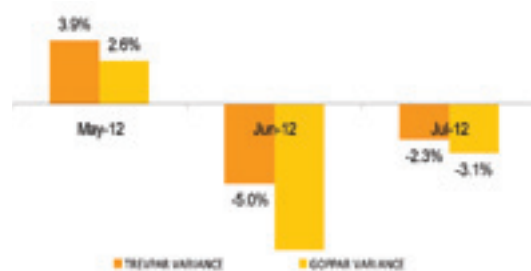
"Host cities have proved time and time again that the biggest international events, such as the Olympics and football World Cup, rarely pay off for hoteliers during the period of the event and London is no exception.

However, it is important for London hoteliers to put July's performance into context rather than licking their wounds, as most other cities across the UK and Europe would consider a room occupancy close to 82 per cent and a 6.3% increase in room rate to be a hugely successful month," said Jonathan Langston, managing director at TRI.

Demand attracted to the biennial Farnborough Air Show was not enough to offset the inevitable decline in volume from the highs of 2011, which contributed to a 2.3% decline in Total Revenue per Available Room (TrevPAR) to £171.16 as hoteliers in the capital also suffered a 5.1% year-on-year drop in food and beverage revenue to £24.58 per available room.

As a result of the movement in revenue and costs, Gross Operating Profit per Available Room (GOPPAR) for the month dropped by 3.1% to £91.79, which many will consider to be a small price to pay for what will undoubtedly be a reinvigoration of London's tourism industry.

LONDON LAST 3 MONTHS YEAR-ON-YEAR CHANGE



HotStats London Main KPIs

LONDON

	Jul '12	Jul '11	Var b/w		YTD '12	YTD '11	Var b/w	
Occ %	81.6	91.8	-10.2	▼	79.6	80.9	-1.3	▼
ARR	159.26	149.80	6.3%	▲	135.99	132.98	2.3%	▲
RevPAR	130.03	137.58	-5.5%	▼	108.22	107.62	0.6%	▲
TrevPAR	171.16	175.10	-2.3%	▼	147.48	145.63	1.3%	▲
Payroll %	21.0	20.4	-0.6	▼	24.2	23.8	-0.3	▼
GOP PAR	91.79	94.68	-3.1%	▼	69.78	69.84	-0.1%	▼

ARR - Average Room Rate, RevPAR - Revenue per available room, TrevPAR - Total Revenue per available room, - GOP PAR Gross opportunity profit per available room.

Mixed performance at Provincial Olympic host cities during July

The reach of the Olympic Games went well beyond the boundaries of Greater London, with the cycling through Surrey, the rowing at Dorney Lake and the tennis at Wimbledon, but there were mixed results in July for other major host cities throughout the UK, according to the latest HotStats survey.

The other host cities of Cardiff, Glasgow, Newcastle, Manchester and Coventry were used for games in the men's and women's football tournament with the first event of the entire 2012 Olympiad hosted at Cardiff's Millennium Stadium.

Major events at the Millennium Stadium are what Cardiff hoteliers do best and the city revelled in its role in the 2012 Olympics, providing hoteliers in the Welsh capital with a much needed boost in performance in both room occupancy (+6.6 percentage points) and average room rate (+6.5%), which contributed to a 13.8% increase in TRevPAR to £107.55. As a result of astute cost management, the city was able to achieve a year-on-year increase in profit per room of more than 45% to £34.54.

Positive profit performance was also achieved in Glasgow (+4.4%) and Coventry (+4.1%) with the greatest margin of growth achieved in Newcastle (+16.7%). And whilst the statistics suggest that increases in headline performance levels were not entirely due to Olympic demand, hosting the Olympic teams and their entourages and families, as well as the media, sponsors and officials, will undoubtedly have boosted business.

Meanwhile, the games at Old Trafford had little impact on overall performance levels in Manchester, with a slight increase in RevPAR recorded as the 3.6 percentage point decline in room

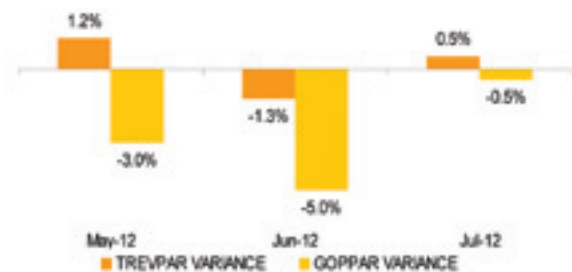
occupancy, to 76.2%, was more than offset by the 5.3% increase in average room rate for the month, to £78.62.

However, as a result of the movement in revenue and costs, Manchester hoteliers recorded an overall decline in profit per room of 3.2% in July to £32.86 per available room.

Aside from the Olympics, 109,000 visitors to the 2012 Farnborough Air Show from 9 to 15 July enabled hoteliers in nearby Basingstoke to achieve profit growth of more than 41% as many visitors to the biennial event gave London a wide berth. The growth in profit was driven by a 21.4% increase in RevPAR.

Overall, whilst the Provincial hotel market ended yet another month with a decline in profit (-0.5%), positive increases were achieved in RevPAR (+2.2%) and TRevPAR (+0.5%), as well as a much sought after increase in average room rate (+3.3%) to £72.23.

PROVINCES LAST 3 MONTHS YEAR-ON-YEAR CHANGE



HotStats Provinces Main KPIs

PROVINCES	Jul '12			Jul '11			YTD '12			YTD '11		
	Jul '12	Jul '11	Var blw	YTD '12	YTD '11	Var blw	YTD '12	YTD '11	Var blw	YTD '12	YTD '11	Var blw
Occ %	76.7	77.6	-0.8 ▼	69.1	68.8	0.3 ▲	69.1	68.8	0.3 ▲	69.1	68.8	0.3 ▲
ARR	72.23	69.91	3.3% ▲	69.41	68.88	0.8% ▲	69.41	68.88	0.8% ▲	69.41	68.88	0.8% ▲
RevPAR	55.42	54.23	2.2% ▲	47.93	47.36	1.2% ▲	47.93	47.36	1.2% ▲	47.93	47.36	1.2% ▲
TrevPAR	100.60	100.06	0.5% ▲	90.04	89.82	0.2% ▲	90.04	89.82	0.2% ▲	90.04	89.82	0.2% ▲
Payroll %	30.6	30.6	-0.1 ▼	33.3	33.0	-0.2 ▼	33.3	33.0	-0.2 ▼	33.3	33.0	-0.2 ▼
GOP PAR	32.58	32.73	-0.5% ▼	24.42	25.46	-1.1% ▼	24.42	25.46	-1.1% ▼	24.42	25.46	-1.1% ▼

HOTSTATS Briefing Data

UK Chain Hotels - Performance report Currency: £ Sterling



The month of July 2012

	Jul '12	Jul '11	Var b/w	
TOTAL UK				
Occ %	78.5	82.7	-4.2	▼
ARR	104.61	101.64	2.9%	▲
RevPAR	82.11	84.03	-2.3%	▼
TrevPAR	125.83	126.89	-0.8%	▼
Payroll %	26.0	25.6	+0.4	▼
GOP PAR	53.75	54.88	-2.0%	▼
LONDON				
Occ %	81.6	91.8	-10.2	▼
ARR	159.26	149.80	6.3%	▲
RevPAR	130.03	137.58	-5.5%	▼
TrevPAR	171.16	175.10	-2.3%	▼
Payroll %	21.0	20.4	+0.6	▼
GOP PAR	91.79	94.68	-3.1%	▼
PROVINCES				
Occ %	76.7	77.6	-0.8	▼
ARR	72.23	69.91	3.2%	▲
RevPAR	55.42	54.23	2.2%	▲
TrevPAR	100.60	100.06	0.5%	▲
Payroll %	30.6	30.6	-0.1	▼
GOP PAR	32.58	32.73	-0.5%	▼

The Calendar year to July 2012

	YTD '12	YTD '11	Var b/w	
TOTAL UK				
Occ %	72.8	73.1	-0.3	▼
ARR	95.49	94.32	1.2%	▲
RevPAR	69.54	68.98	0.8%	▲
TrevPAR	110.63	109.84	0.7%	▲
Payroll %	28.9	28.6	-0.3	▼
GOP PAR	40.68	41.38	-1.7%	▼
LONDON				
Occ %	79.6	80.9	-1.3	▼
ARR	135.99	132.98	2.3%	▲
RevPAR	108.22	107.62	0.6%	▲
TrevPAR	147.48	145.63	1.3%	▲
Payroll %	24.2	23.8	-0.3	▼
GOP PAR	69.78	69.84	-0.1%	▼
PROVINCES				
Occ %	69.1	68.8	0.3	▲
ARR	69.41	68.88	0.8%	▲
RevPAR	47.93	47.36	1.2%	▲
TrevPAR	90.04	89.82	0.2%	▲
Payroll %	33.3	33.0	-0.2	▼
GOP PAR	24.42	25.46	-4.1%	▼

The twelve months to July 2012

	Rolling '12	Rolling '11	Var b/w	
TOTAL UK				
Occ %	73.6	73.7	-0.1	▼
ARR	94.61	93.42	1.3%	▲
RevPAR	69.64	68.85	1.1%	▲
TrevPAR	112.15	111.58	0.5%	▲
Payroll %	28.5	28.3	-0.2	▼
GOP PAR	42.15	42.99	-1.9%	▼
LONDON				
Occ %	80.6	81.9	-1.4	▼
ARR	133.49	129.93	2.7%	▲
RevPAR	107.59	106.48	1.0%	▲
TrevPAR	147.66	146.46	0.8%	▲
Payroll %	24.1	23.9	-0.2	▼
GOP PAR	70.53	70.74	-0.3%	▼
PROVINCES				
Occ %	69.7	69.1	0.6	▲
ARR	69.46	69.22	0.3%	▲
RevPAR	48.41	47.82	1.2%	▲
TrevPAR	92.29	92.06	0.2%	▲
Payroll %	32.5	32.3	-0.3	▼
GOP PAR	26.28	27.47	-4.3%	▼

TRI Hospitality Consulting

Jonathan Langston - Managing Director | T 0207 892 2201 | E jonathan.langston@trihc.com
Ben Livingstone - Managing Consultant | T 0207 892 2205 | E ben.livingstone@trihc.com

HOTSTATS

Mark Dickens - Managing Director | T 0207 892 2207 | E mark.dickens@hotstats.com
David Stephens - Operations Manager | T 0207 486 2217 | E david.stephens@hotstats.com

Members' Events



Forthcoming events

- | | |
|---|---|
| <p>Oct 8 Regional Members Meeting - Edinburgh
This regional members meeting is to be held at The Radisson Blu, Edinburgh (80 High Street, The Royal Mile, Edinburgh, EH1 1TH) on Monday 8th October from 6.00pm with the presentations beginning at 6.30pm promptly.</p> <p>Oct 16 Evening Workshop - London
Real Time Information and payroll processing: what does this mean for you?
Presented by HMRC. Held at Mazars' London offices (E1W 1DD) from 6.00pm for a 6.30pm start. This workshop will provide practical guidance as to how employers should prepare for the changes to be introduced from April 2013. Do you keep records of hours worked, gender and nationality? Does your company offer share options? Will your payroll software be ready to report all the necessary information every month instead of just at the year end? What about tronc? Hear how your employees will benefit from the changes and the positive feedback from the companies involved in the rollout so far.</p> <p>Nov 2 HRMC Regional Breakfast Workshop - Manchester
Held at The Lowry Hotel, 50 Dearmans Place, Chapel Wharf, Salford, from 9.00am for a 9.30am start. This workshop will provide the opportunity to discuss issues of your choice whilst enjoying coffee and croissants. These discussions will be followed by presentations from industry vendors.</p> <p>Nov 5 Regional Members Meeting - Birmingham
This regional members meeting is to be held at Jurys Inn Birmingham, 245 Broad Street, on Monday 5th November. Wine & canapés will be served from 6.00pm with the presentations beginning at 6.30pm promptly. Further information regarding the topic under discussion, and the presenters, will be added in due course.</p> | <p>Nov 7 Breakfast Seminar - London
Financial reporting and tax - are you up to date with the latest developments?
Presented by PKF LLP
"CPD made easy" ... everything you need to know in just 90 minutes, served up with coffee and croissants! This event is from 8.00am for a 8.30am start and is to be held at PKF, Farringdon Place, London.</p> <p>Nov 22 HOSPACE 2012, Sofitel Hotel, Terminal 5, Heathrow, London
For details, including the outline programme and registration, please visit www.hospace.net.</p> <p>Dec 4 Evening Members' Meeting - London
Hotel valuations - is it still all about the price of a bottle of coke?
Presented by Russell Kett, Chairman, HVS International. Further details and venue to be confirmed.</p> <p>Dec 19 HOSPA Annual Awards Lunch 2012
Park Plaza Westminster Bridge
Join us to celebrate the achievements of the HOSPA prizewinners with awards for the highest achieving learners on the HOSPA Education Programmes in the past year.</p> <p>Jan 15 Evening Members' Meeting - London
Owner - Operator disputes continued... management contracts
Presented by Felicity Jones, Watson, Farley & Williams LLP. Further details and venue will be released in due course.</p> |
|---|---|

Registration is necessary to attend all the above workshops and meetings: please visit the events section on our website or email wayne.gosden@hospa.org with your details.

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Taking the Investment forward

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A Leaders Panel

To debate latest trends and issues in the industry:

- Paul Dukes, Chairman, Kew Green Hotels and HOSPA
 - Robert Cook, Chief Executive, De Vere Hotels & Village Urban Resorts
 - Grant Hearn, Chief Executive, Travelodge
 - Surinder Arora, Chairman, Arora Hotels
- Together with leaders from Hilton and Apex Hotels.

Finance Panel Session

Getting the wheels of Hotel Finance to turn again

Revenue Management Session

What is the Revenue Management contribution to strategy and future leadership in Hospitality?

Hospitality IT Debate

Can outsourced IT Services really support the needs of Hospitality IT for both internal business requirements and guest services?

Industry review and update

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