

# THE OVERVIEW

ISSN 2048-4844 NOVEMBER ISSUE 2012


## CONFERENCE EDITION



### **This year at HOSPACE:**

Hospitality Finance, Revenue Management and IT Panel sessions  
plus Educational workshops

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# Welcome to THE OVERVIEW

## Welcome to the Conference edition of the Overview.

At the end of October the double-dip recession was officially declared over by the Office for National Statistics, which announced the UK economy grew by one per cent in the three months to September. So is it time to celebrate? It is widely reported that in general UK businesses are sitting on a record £750bn of cash – a potential gold mine for the recovery – but they are not investing. What does this mean for the hospitality sector?

These issues and many more will be discussed at this year's HOSPAA Annual Conference entitled 'Taking the Investment Forward – Making the Most of the Investment in Your People and Business to Create Value'. A leading panel session focusing on the financial issues impacting on the sector, entitled 'Getting the Wheels of Finance to Turn Again', will be one of the key sessions at this year's event. Under the skilful chairmanship of HVS Chairman and Fellow member of HOSPA Russell Kett, the panellists will include: Sylvia Matthews, Senior Vice President, Finance, Jumeirah Group; John Stuart, Chief Financial Officer at BDL Management – the UK's largest multi brand and hotel management company; Graeme Smith, Partner, Zolfo Cooper Corporate Finance, who leads Zolfo Cooper's activities in the hotel sector; and Tim Helliwell, Head of Hotel Finance, Hospitality & Leisure Team, Barclays Bank.

During the conference there will be the opportunity to learn from a series of expert panels on financial, revenue management and IT topics and make your selection from a range of parallel workshops to attend on specific topics all related to managing and creating value in your hospitality business. The accompanying IT Exhibition featuring leading suppliers from the sector showcasing their latest products and services provides an excellent opportunity to keep to date with the cutting edge technology available.



Finally, the excellent networking opportunities in the relaxed environment of the Sofitel Hotel, T5 Heathrow will ensure that members and guests can enjoy a stimulating and profitable day!

We look forward to meeting you!

*Debra Adams*

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Hospitality Finance, Revenue and IT Professionals

**BAHA Moving Forward**

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## The Overview online

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**Nick Warner**  
VAT Partner - London

If you would like any further information in relation to the contents of this article, please contact Nick Warner at [nick.warner@uk.pkf.com](mailto:nick.warner@uk.pkf.com).

## Buy-to-let hotel rooms and VAT

Nick Warner, VAT partner at PKF, explains the reasoning behind a recent win for the taxpayer.

**T**he market in buy-to-let hotel investments is relatively new and first began to get noticed in the late 2000s when some major new hotel projects in London were financed on that basis. Since then, the concept has rolled out across the country but, as with many new business models; it has taken a while for the VAT ramifications to become completely clear.

A recent VAT tribunal case brought by private buyers, Mr and Mrs Roden, deals with a situation where HMRC tried to create a VAT trap which would ensnare the unwary hotel room investor. This story has a happy ending (for now at least), but serves to highlight the VAT risk to which private and often inexperienced investors can be exposed when committing to these projects.

### VAT on hotels and holiday accommodation

The letting of residential accommodation, such as private dwellings, is exempt from VAT. While this has obvious advantages for the tenant, the exemption also means that the landlord is heavily restricted in how much VAT it can recover on related costs.



On the other hand, the provision of hotel rooms and holiday accommodation is subject to VAT at 20%, and those letting them are entitled to full recovery on costs incurred in respect of the properties.

## The buy to let scheme

A company developed an upmarket hotel complex in Cornwall and sold each of its rooms/apartments (typically on a 999 year lease) to private investors, who would make money by sub-letting the rooms to guests wishing to stay there. The investor would also have the right to occupy the unit themselves for a few weeks of the year.

Once the property was finished, the developer signed over the day to day operation of the complex to an agent. The agent was responsible for servicing and maintaining the rooms, plus running the common areas of the hotel, such as reception, the bar and restaurant etc. It was also contracted to advertise and market the complex and take bookings for the individual units. Investors who purchased a unit would pay commission, presumably based on a percentage of room hire income, to the agent in exchange for these services.

## The VAT problem

Mr and Mrs Roden bought a three bedroom holiday apartment at the complex for £400,000 plus VAT. They registered for VAT with HMRC to recover the £70,000 of VAT they had paid on its purchase. This triggered a visit from HMRC to verify the claim before releasing the VAT refund. HMRC examined the terms of the contract with the agent and refused to repay the £70,000.

HMRC took the view that the contractual structure meant the Rodens let the room to the agent and not directly to the occupant of the room. It further concluded that this meant that the Rodens had made an exempt property let and not a VATable supply of hotel/holiday accommodation, so were not entitled to recover the VAT on their initial investment.

Mr and Mrs Roden understandably disagreed, and have now won their case at the First-tier Tax Tribunal. While it did not dispute HMRC's reading of the contractual relationship with the agent, the tribunal decided that who eventually slept in the room was not relevant to the VAT position - the Rodens had made a VATable supply of hotel/holiday accommodation (albeit to the agent). The judge observed that to decide otherwise would, for example, mean that the supply of hotel rooms to a company for the use of its employees must be exempt from VAT, which is clearly not the intention of the lawmakers.

In short, the tribunal decided that the Rodens were entitled to register for VAT, and recover the substantial amount of VAT they had paid on the lease.

A photograph of a modern office desk. On the desk, there is a laptop, a tablet displaying a dashboard with charts, a mobile phone, and a pen holder. The background is a blurred office environment.

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## Date for your diary:

Wednesday 7th November  
'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 (finishing at approx. 10.00am) and is to be held at the PKF London Office, Farringdon Place, 20 Farringdon Road, London, EC1M 3AP.

## AGENDA

**8.00 - 8.30am - Breakfast and networking**

**8.30am - Presentations begin:**

*Welcome from Stuart Collins, Joint Head of PKF Hotel and Leisure Sector*

*Hotels trading and market update - Robert Barnard, Head of PKF Hotels Consultancy*

*Recent developments in accounting and financial reporting (UK GAAP and IFRS) - Rob Frost, PKF, Technical Senior Manager*

*Taxation update - corporation tax, VAT and employment taxes matters - James Welch, Tax Partner (Hotels and Real Estate)*

**10.00am - Presentations conclude - more breakfast and networking continues**

To register, please email [wayne.gosden@hospa.org](mailto:wayne.gosden@hospa.org) with your details

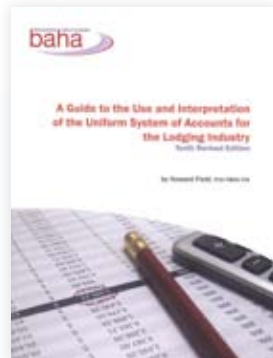
## Lessons to be learned?

This case resulted in what appears to be a resounding loss for HMRC, although the possibility of an appeal cannot be ruled out just yet. Despite getting the right result, one can assume Mr and Mrs Roden were deprived of their £70,000 from the date they bought the property until the tribunal decision finally went against HMRC in the last few weeks, and their cashflow was severely impaired. This highlights the high risks of such big money investments for private investors, including having to negotiate the complexities of VAT.

Hotel developers or agents whose clients may have fallen into this trap and have not as yet challenged HMRC's approach should ask for the decision to be reviewed as soon as possible. Operators may also consider seeking advice over how they can provide a clear support structure to help their customers negotiate the VAT and direct tax implications of their high value investment.



## In the HOSPA bookshop



### **Uniform System of Accounts for the Lodging Industry (10th Edition) published 2006**

The most recent edition of the USALI addressed the current industry trends, which emerged since the 9th edition was published in 1996. Some of the evolving issues which were addressed by the 10th edition included how to deal with condo hotels, reporting for internet wholesales, and resort fees, which seems to have particular relevance in this day and age of a la carte pricing which the airline industry has recently adopted.

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### **Guide to the Uniform System of Accounts for the Lodging Industry (10th Edition) written by Howard Field and published by HOSPA**

The aim of this guide is to provide help to a range of users including students, trainee accountants, financial and operational managers, new entrants to the hotel sector, teachers, asset managers, legal and financial advisors and analysts, auditors and anyone who is involved in the hospitality industry and who has a need to become familiar with the Uniform System.

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Fourth are proud to welcome **ADACO** to the Fourth family.

## How did a venue like Ascot future-proof its ICT, and set a benchmark for all hospitality venues to follow?

For Ascot, there was no second guessing or compromise. It looked boldly to its future, and invested in IT to ensure it had future proof infrastructure to serve the evolving needs of race goers, service partners and stakeholders – trainers, jockeys and the media. With up to 300,000 visitors during Royal Ascot, scalability and resilience for both commercial and public safety reasons were key.

Historically cabling at Ascot had been a challenge. TV crews would regularly be stringing miles of cable for camera connections. Caterers Sodexo, the Tote and other bookmakers would all require expensive fixed line phone systems for credit card validation and reporting systems, which cost them line rental fees and tied them to a limited range of locations on site.

The new infrastructure had to provide the connectivity needed for communications, broadcast media, IT and public safety and provide an infrastructure that would cope with evolving services.

“We did not want to see coax in the walls that would become a redundant talking point in a few years,” said Alastair Warwick, General Manager at Ascot



Racecourse. “The technology here needs to facilitate every aspect of our business, from intra race activities to maximising the race excitement, adding the ‘wow factor’ to the day for our customers.

Now Ascot’s ‘wow factor’ is immediate. New entry turnstiles plug straight into the IP network and speed up access for visitors, delivering a more accurate count of the people in any one area allowing Ascot to sell more tickets and enabling lost tickets to be replaced securely.

Once onsite, guests are kept up to date via 1600 IP enabled TV monitors which display race information, live views, instant replays and information on catering and safety. “Our partners can now just walk in and work,” said Warwick. Tote, for example, can now use secure Wi-Fi

betting terminals providing more outlets in locations that they previously could not cover without the cost of leasing BT lines, upping the total number of bets placed.

Trainers eager to see the details of their horse’s performance are now delivered a DVD of the race within minutes, while in the media centre journalists can enjoy streamed instant replays of each of the day’s races and high bandwidth connections for filing stories.

“The real return on investment is being able to do and offer things that we were never able to before,” said Warwick. We are attracting more non race day clients as events teams can just turn up, plug and play, and they no longer need to spend hours cabling and configuring systems.”

### When Ascot wanted to wow its visitors and empower business partners at its racecourse, it turned to Redstone.

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To read the full case study of how we helped Ascot, visit: [www.redstone.com/ascothospa](http://www.redstone.com/ascothospa) Or why not speak to a member of our team about your requirements? Whether it’s simply an internet connection, or you want to create revenue from Wi-Fi for your guests, drop us an email at [salesenquiries@redstone.com](mailto:salesenquiries@redstone.com) for a chat.







**Chris Denison Smith**  
Director of FM Recruitment

FM Recruitment is a long standing specialist financial recruitment business in the hospitality sector responsible for placing hundreds of candidates into key finance roles globally. Chris has been with FM Recruitment since 2000, and has a thorough knowledge of the market and issues affecting finance professionals and their careers. FM Recruitment is part of the Hospitality People Group and can be found at [www.fmrecruitment.co.uk](http://www.fmrecruitment.co.uk).

## Social Media Leverage for the Hospitality Business

The world has changed following a quantum shift in people's daily lives and socialisation. We live in a connected world and across all continents the younger generation is connecting daily through Facebook, MySpace, Twitter and similar sites as their first port of call when they log-on with their laptops, smartphones and tablet PCs. Today's teenagers and twenty-somethings may now, or soon, be your customers, but older generations too are engaging daily. The change is profound and goes beyond the mainstream applications market – some have called it a paradigm shift.

**W**hether your focus in the hospitality business is on IT, Sales and Marketing or Operations – and yes, even Finance - there is significant leverage to be gained from the use of social media. It works both inwards and outwards, both defensively and offensively. You can not, should not, ignore it – it should be embedded in your business strategy. But, firstly, the bad news.

### Bad News goes Exponential

You might be aware of the rule of thumb that when a customer has a bad service experience, eleven times more people get to hear about it than when they have a good service experience. It's certainly true that bad news travels fast and in today's connected world that travel is immediate and the reach is exponential.

Travellers and hotel guests are commenting on your business right now on sites such as TripAdvisor, Expedia or ConferenceTraveller, rating your service levels and maybe even redirecting your potential customers to other providers. Of course, they may be giving you glowing recommendations – but do you know which it is?



Are you monitoring the chat about your hotel portfolio or boutique hotel, conference centre or spa, finding out about a performance problem that you haven't picked up from your mystery guest program and comparative operational reports?

Are your competitors using social media to de-market your business with paid bloggers knocking your brand? Your brand is a valuable commodity, but are you defending it in the virtual world?

There is good news too – and that is that there are many tools and techniques for addressing these challenges and turning them into positive opportunities.

## Turn your Business to Face the Future

Social media offers a powerful set of tools to hospitality businesses. They range from the strategic to the tactical, defensive and offensive. Here are some guidelines for successfully using that power specifically for hospitality to make sure your business is fully engaged to defend attacks and orientated to face the future – which is here, right now.

### #1 Be Strategic

Appoint a Social Media Manager. This may be a small role in the smaller business, but can be a full time role in the largest of operations. Of course, no-one wants to see their staff spending hours a day on Facebook, but there are tools available to help with this. Some organisations may have to adjust employee access policies in order to allow such access.

A full strategic marketing stance will involve a Head of Social Media linking Sales and Marketing, Operations, IT and even Finance departments to get the most out of social media.

### #2 Be There, Be Engaging

Does your business have a Facebook page, do you invite comments from your market segments, and are you using it to test market reach and test special offers? Does your business blog? Research has shown that 57% of marketers acquired customers via blogging (source: thesocialskinny.com).

Use the most engaging techniques for presenting your brand, employing video whenever the opportunity arises. Remember the restaurant rule #1 – 'sell the sizzle'. It is a great principle, and every hospitality business should apply it. We cannot smell online (yet) but you can engage your site visitors' eyes (and ears too). What looks more inviting – a still picture of a spa bath or a video clip of bubbles and laughter?

Video sites, Facebook and specialised online business channels such as yourbusinesschannel.com make this so easy these days. With the opportunity to capture comments from visitors – even on a new interior decorating scheme for a refurbishment project, the potential benefits are clear.

### #3 Set your Priorities, Set your Alerts

There is a multiplicity of social media sites and it is impossible to engage fully with all of them. Depending on the particular niche (or niches) you operate in, there may be social networks and sites that are particularly

relevant to you. With a basic alerts tool such as Google Alerts, you can receive reports of when your business is mentioned in a blog comment or other site posting (as soon as Google has indexed it). More sophisticated tools shorten the time before you receive an alert, filter and analyse comments and then take this further with more detailed reports of your online reputation.

When you know which the most active and relevant sites are, then you can engage formally with a few of the most active relevant platforms, whilst still monitoring others. Then, when negative comments are detected you can address them and resolve them – publicly, of course, which is a positive response.

Received wisdom is that 35% of consumer comments on Facebook are compliments. The other 65% may not all be negative, but even if that number was halved, then you can see that there is repair work to be done – maybe on your brand.

One final point. Don't believe everything – there are spoilers out there, and not all working for your competitors. Some users will 'try it on' publicly in the hope of getting a voucher, price reduction or other sweetener – before or after an event. It is unpleasant, but at least if you are engaged you can address it. Just think about the effect if you didn't know about the issue, and it was there on that site for all and sundry to see, with a perception that your business was not interested in disaffected customers. It is much better to know about the complainers – after all, they may have a genuine grievance, and you may have an opportunity to 'do it better'.

### #4 Choose your Channels, Audition your Audiences

This makes your priority setting more refined and puts your brand on the offensive, with more refined audience discrimination (perhaps with language and cultural distinctions), ABC or SIC categorisations appropriate for your business's markets whether B2C or B2B.

For example, are your rooms or facilities being booked by holidaymakers or by PAs? Choose the best social networking platform to target your market and market segments, whether it is a professional network such as LinkedIn with special interest groups or a platform such as Facebook.

### #5 Check the Competition

We are not advocating underhand tactics to de-market the



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**Shannon Bedard - VP Sales & Marketing | Shannon@Data2Gold.com**

competition (though, sadly, it does happen), but because social networking is such a public medium, it is easy for businesses to monitor their competitors' online reputations, find out what the social chat is saying about them and to refine their picture of their competitors strengths and weaknesses.

With this knowledge, business leaders can sharpen their strategic business differentiation, respond early to competitors' marketing initiatives and maintain a sharper competitor analysis in their strategic planning.

### #6 Don't Ignore Mobile

There are, on average, 1.3 mobile phones in use for every person in the United Kingdom, and that's a fact. 75 million mobiles, 61 million people. 52% of users have smartphones. In 2011, 19% of travel industry searches were from mobiles. People are chatting with Tweets, posting to Facebook – with pictures – even about the most banal of events.

It is another paradigm shift and businesses have to deal with it. A Tweet which says 'I've just checked in at Dream Hotel and the bathroom hasn't been cleaned' going out from a guest with 1000 or even 10,000 followers needs sorting, and quickly. You need to know about it, you need to act and limit the damage, connect, and turn it into a business testament for you – a positive customer tweet of appreciation will leverage those 1000 or even 10,000 followers. However, you can only respond if you know about it.

### #7 Market, Market and Market

Some social networks such as Facebook have a much more intimate portrait of their users' likes and dislikes, and of course of

their friends. This delivers much more precise targeting and that itself is leveraged by the power of the exponential effect.

Liberty Stadium (home of Swansea City Premier League Football Club and the Ospreys rugby team) has an active social media marketing campaign for its exhibition and conference facilities. Earlier in 2012 they ran a modest Facebook campaign to build 7,000 Facebook likes. The campaign achieved its volume target early, and at the nominal campaign end date had comfortably exceeded its volume target. Social media with its laser-like demographic precision works well for them as a prime channel, marketing wedding shows, business conferences and exhibitions.

There's an old saying in marketing: 'Half of my marketing budget is wasted, but I don't know which half'. The web has changed that, and now social media marketing is delivering even more precision and marketing budget efficiency.

## Conclusion

Whatever the continent, socialisation habits have changed dramatically in countries as diverse as China and Brazil. Data, tools and techniques for business offence, defence, marketing precision, operational improvement and market intelligence are delivered in abundance by social media marketing. Whatever your hospitality niche is, you can be sure that your competitors are embracing the opportunities that social media offer for their business success. Is your business facing the future, here and now?

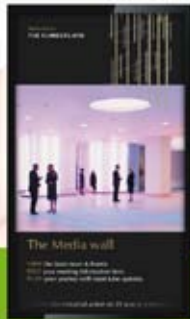


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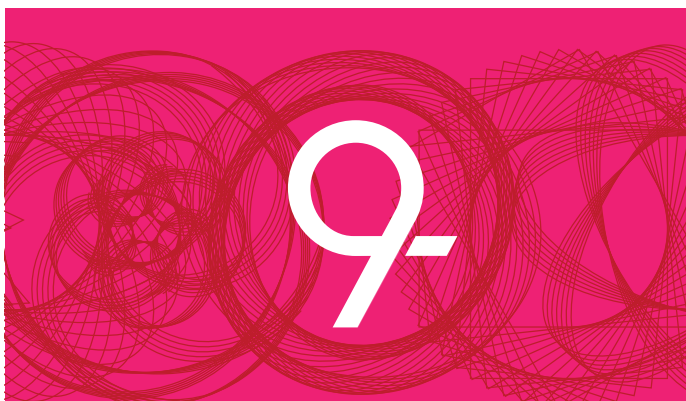


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# Hospitality Professional Awards

At this year's Annual Awards Lunch we will be celebrating the achievements of the HOSPA learners and the recipients of a range of professional awards for 2012 including:

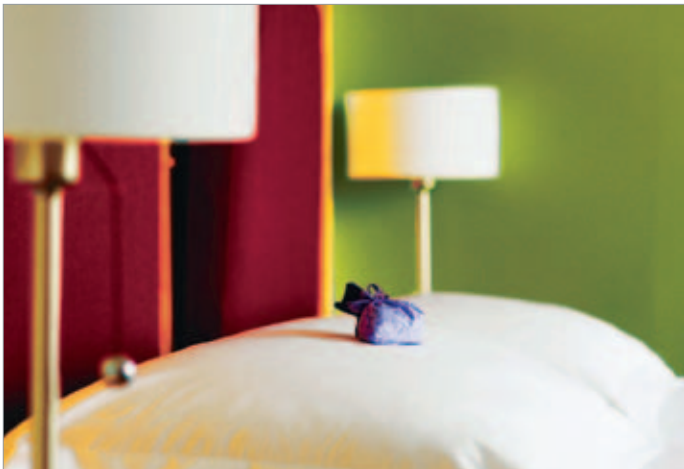
**Employer of the Year (Corporate and SME)**

**Finance Professional of the Year**

**IT Professional of the Year**

**Revenue Professional of the Year**

The closing date for nominations is 14th November 2012. Please go to [www.hospa.org/events/awards-lunch](http://www.hospa.org/events/awards-lunch) to download a nomination form. Once complete, please send to Lucy Vierbergen at [lucy.vierbergen@hospa.org](mailto:lucy.vierbergen@hospa.org) or fax; 01202 887967.



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# Weather holds back September sales in pubs and restaurants

- Like-for-like sales ahead just 0.7% on 2011
- Torrential rain at end of month cancels out bright start to September

*Bad weather at the end of September held back sales growth at Britain's leading pub and restaurant groups in September. Collective like-for-like sales were up just 0.7% on the same month last year, according to latest data from the Coffe Peach Business Tracker, the industry's sales barometer.*

The performance followed a 2.1% like-for-like increase for the sector in August. Total sales for September, including the effect of new openings, rose 4.1%.

"The first week of September saw a big boost in sales, but the downpour in the last week was a wash-out for business, and especially pubs, leaving overall trading essentially flat," 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 Coffe Group, Baker Tilly and UBS.

"It goes to show that the weather remains a major influence on trading patterns for the eating and drinking out sector," Martin added. "In September, the wet weather particularly depressed alcohol and pub sales, while food and eating out held up better."

Regionally, the Coffe Peach figures showed little overall difference between trading inside and outside the M25, although pubs had a better time in London and high street restaurant brands did relatively better away from the capital. "The good news is that even with that set-back, the bigger operators were still in positive growth and collectively continuing to gain market-share," concluded Martin.

Underlying figures for the 12 months to the end of August, show combined total sales for the 25 companies providing data for the Tracker were up 5.8% on the previous 12 months, with combined year-on-year like-for-likes running ahead 1.7%. The Coffe 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.

Trevor Watson, Director at Davis Coffe Lyons, said: "The September results serve to remind us that consumer confidence remains weak. Although the corporate operators are growing market share, there is significant pressure on leisure spending for most households. Operators

must continue to deliver value for money now more than ever. The need to continue to drive margin is intense as the recent failure of Waverley TBS indicates. The forthcoming Christmas period will be crucial to all."

Paul Newman, Co-Head of Leisure and Hospitality at Baker Tilly, added: "Leading operators will be disappointed that the 2.1% like-for-like sales increase in August did not last through September. Last year's comparative sales were always going to be tough to beat, when the warmest end to September for over 100 years gave a late season boost to the industry. That was in stark contrast to this year's downpours that persuaded consumers to stay at home.

"On a positive note, total sales growth up at 4.1% was more encouraging and demonstrates a robust and confident sector which continues to attract long term investment from pub and restaurant operators through the rollout of new sites and private equity interest."

Jonathan Leinster, Head of UBS European Leisure Research, said: "This year, month-on-month LFL sales data has not shown a consistent trend, but we would note that in current calendar year the average LFL sales growth has been only just positive, with four out of the first nine months showing LFL sales declines. This is a significant deterioration from 2011, which saw LFL sales at over 3% and only one month that saw an actual LFL decline. Indeed, 2012 appears more like 2010 than 2011."

Monthly sales: National		
Total year on year sales growth		4.2%
Like for like sales growth		0.6%
Monthly sales: Inside M25		
Total year on year sales growth		4.1%
Like for like sales growth		0.9%
Monthly sales: Outside M25		
Total year on year sales growth		4.0%
Like for like sales growth		0.7%
MAT: National MAT turnover change for last 12 months		
% Total sales growth compared to previous 12 months		5.8%
% Like for like sales growth compared to previous 12 months		1.7%

## Pub and restaurant group monthly sales performance for past 12 months

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
LFLs	0.9%	2.1%	9.9%	-2.1%	-3.7%	1.9%	-2.0%	2.6%	1.3%	-0.2%	2.1%	0.7%
Total	5.1%	6.2%	13.7%	2.2%	0.6%	6.3%	1.9%	6.5%	5.0%	3.6%	6.2%	4.1%

Source: Coffe Peach Business Tracker. Coffe Peach Business Tracker is powered by Demographix

**For more information please contact**

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## Crucial challenge of obtaining hotel finance to be discussed by expert 'Finance Panel' at HOSPACE 2012

One of the greatest challenges currently facing the UK hospitality industry – the crucial issue of obtaining hotel finance – will be examined by a distinguished panel of hotel finance experts at HOSPACE 2012.

The 'Finance Panel' discussion – entitled 'Getting the Wheels of Finance to Turn Again' – will be one of the key sessions at the prestigious 22 November event. Under the skilful chairmanship of HVS Chairman Russell Kett, the hotel finance panellists will include: Sylvia Matthews, Senior Vice President, Finance, Jumeirah Group; John Stuart, Chief Financial Officer at BDL Management – the UK's largest multi brand and hotel management company; Graeme Smith, Partner, Zolfo Cooper Corporate Finance, who leads Zolfo Cooper's activities in the hotel sector; and Tim Helliwell, Head of Hotel Finance, Hospitality & Leisure Team, Barclays Bank.

Commenting on the 'Finance Panel' session, Russell Kett said: "Boosting investment in the world's hotel sector is the single biggest challenge facing the sector today. Despite strong buyer interest in the global hotel market and plenty of equity available, not least from the Far East and Middle East, there are few hotel transactions taking place outside key locations and gateway cities across Europe."

"In the UK, there is little investor appetite in the provinces where hotel trading continues to languish in all but the best-run hotels. Obtaining debt finance for hotel acquisitions is tough and a number of re-financings due in the next year will prove challenging to accomplish in the current environment without a significant chunk of fresh equity and an understanding bank."

"The HOSPACE 2012 Finance Panellists will discuss what the market really needs to do to kick-start finance – whether new sources of finance could emerge, perhaps from insurance companies; or whether operators must do more to influence the banks to lend. Or does the answer lie with a return to the commercial mortgaged-backed securities market? Join us to find out."



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# Five Minutes with Angela Vickers - Managing Director of Apex Hotels



HOSPA Chief Executive Carl Weldon recently met up with Angela Vickers, Managing Director of Apex Hotels who is a member of the Leaders' Panel at HOSPACE 2012

## What was it like going from Finance Director (FD) to Managing Director (MD)?

My first action was to give the General Managers more autonomy. I didn't have a typical operational background so I deferred to their expertise in running the hotels. This provided an immediate uplift in motivation and creativity, although discussions still very much centered around financial performance and commercial viability. I asked a lot of questions in the first few months, building my knowledge in non-financial aspects such as IT, Sales and Marketing. I had the perfect excuse to question traditional practices and no preconceptions to suggest alternative new ways of doing things.

I have never been one to focus purely on the numbers and have always aimed to take a wider commercial view – due to my training at KPMG – so the transition wasn't as difficult as it might have been. I also had the benefit of eight years' valuable experience in working at Stakis and Hilton. Of course, I was helped enormously by the owner of Apex, Norman Springford, who was still very much involved with the business back then.

## How long before you felt comfortable in the role?

I measure it in terms of when I began to automatically put the customer first before the figures, and that took about a year to achieve. We had four hotels when I became MD and now have eight – with three in London. This meant that I adapted my role as the business grew and developed. The first London hotel opened in 2005 and this catapulted us into a different league. I have been very fortunate in being part of the transition of Apex in steering an increase in revenue from £14m when I joined, to £50m plus today.

## How would you describe Apex Hotels?

Contemporary is the official brand description. Once they have stayed with us, our customers often tell us that we have exceeded their expectations, which suggests we are delivering. It is our mission to be the leading UK independent hotel group, utilising the skills and innovation of our people; and we try to do this through genuine service delivery and a drive to continually improve.

## What are the challenges for you today?

The need to keep all balls in the air during competitive and recessionary times, being one step ahead and keeping on top of the information and data you receive in relation to the challenges.

Eroding contribution set against a backdrop of meeting and exceeding guest expectations. Another is online reputation management, driven by the transparency and accessibility of social media. Food & Beverage in hotels – especially those without Conference and Banqueting – is an ever evolving challenge; and trying to be innovative about cost, as opposed to just reducing it, is one of our key focus areas.

## What is one of the key things you have learnt in your career?

When I worked at Stakis with Sir David Michels, he made us focus on one key target – improvement in share price; and he showed us the links and connections between everything the business departments were doing to drive towards that ultimate goal.

So I learnt the importance of the simplification of your goals and illustrating to the business how everything it does is a funnel towards achieving the overall objective; and a key part of delivering that target is the responsibility of the MD.



How would you like to reach the top?

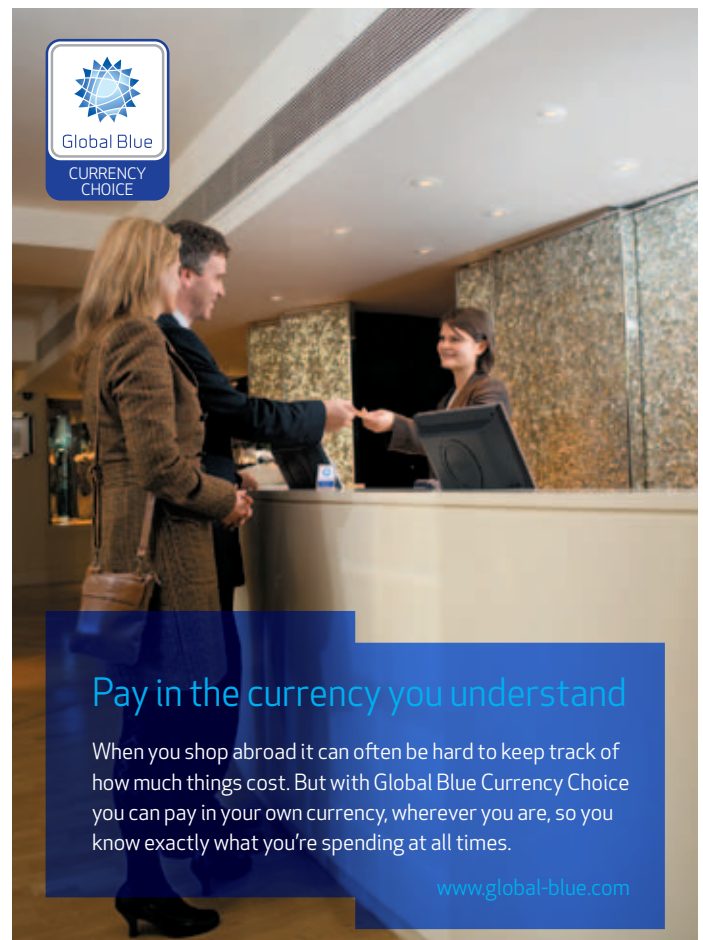


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# Event Programme

Thursday 22nd November 2012

HOSPACE   
Conference & Exhibition 2012

8.15 – 9.00

**Registration** ~ Coffee/Tea Refreshments

9.00 – 9.10

**Conference Opening with HOSPA CEO, Carl Weldon and Robert Cook, President of HOSPA**

9.10 - 9.30

**Industry Overview** - with Konstanze Auernheimer, Director of Marketing & Analysis at STR Global and Liz Hall, Head of Hospitality & Leisure Research at PricewaterhouseCoopers.

9.30 - 9.45

**Develop your talent with the HOSPA Education Programmes** - Professor Peter Jones, MBE, Chair of the HOSPA Education Committee discusses with Sylvia Matthews, Senior Vice President, Finance, Jumeirah Group, how the HOSPA Education Programme in Finance provides professional development at Jumeirah International.

9.45 - 9.50

**'5 Minutes of Fame'** - Hospitality Action Charity

9.50 - 10.35

**Leaders' Panel** - 'Key issues, trends and developments facing the Industry today' with Robert Cook, CEO at De Vere Hotels and Village Urban Resorts and President of HOSPA, Surinder Arora, Chairman and Founder of Arora Hotels, Angela Vickers, Managing Director at Apex hotels, Grant Hearn, CEO at Travelodge, Steven Cassidy, Area Vice President of UK and Ireland at Hilton Worldwide and chaired by Paul Dukes, Chairman of Kew Green Hotels and HOSPA.

10.35 –10.40

**'5 Minutes of Fame'** - Springboard Charity

10.40 –11.10

**Refreshment Break** - An opportunity to visit the Hospitality IT Exhibition featuring some of the 'best in class' products and services.

11.10 –11.15

**'5 Minutes of Fame'**

11.15 –12.00

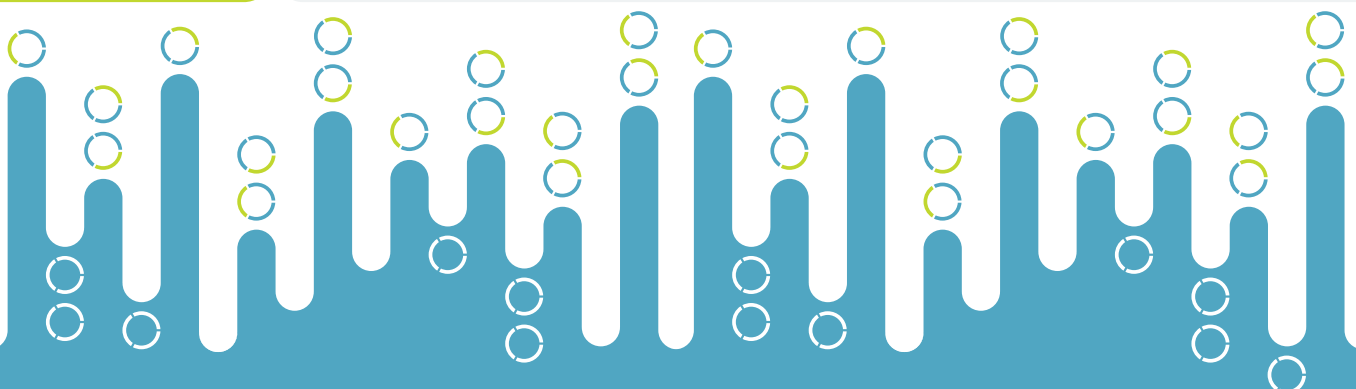
**Finance Panel Session** - 'Getting the wheels of Hotel Finance to turn again' with Graeme Smith, Partner at Zolfo Cooper Corporate Finance, Sylvia Matthews, Senior Vice President of Finance at Jumeirah Group, John Stuart, Chief Financial Officer at BDL Hotels, Tim Helliwell, Head of Hotel Finance Hospitality & Leisure Team at Barclays Bank and chaired by Russell Kett, Chairman at HVS International.

12.00 –12.05

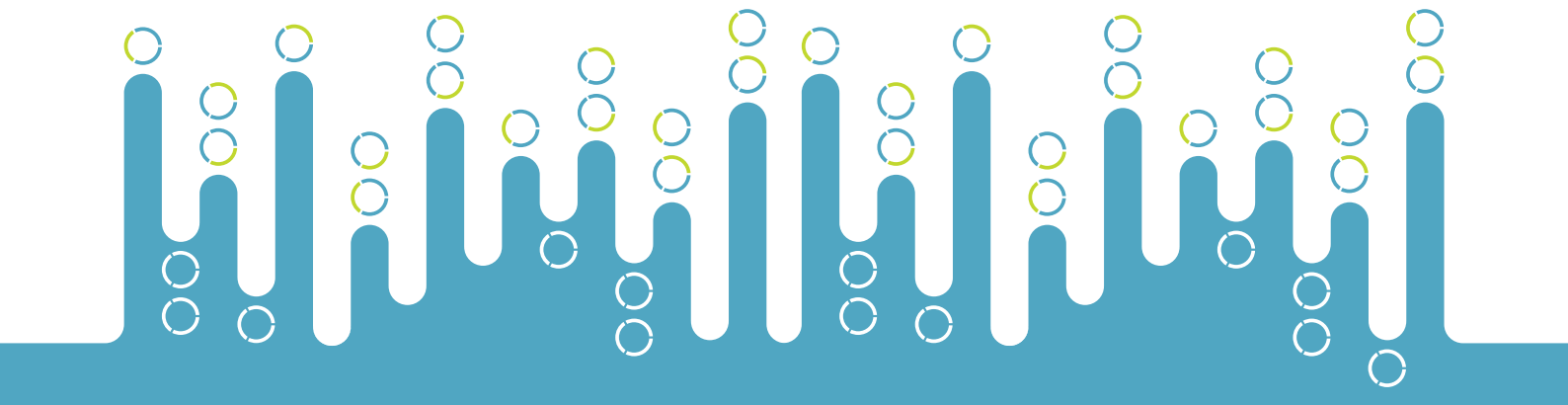
**'5 Minutes of Fame'**

12.05 –12.50

**Revenue Management Panel** - Sponsored by IDEaS - 'Future of Revenue Management and its skills, people and place in the organisation' with Chris Cooper, Group Director of Revenue Management at Rocco ForteHotels, Pamela Carvell, President at Hotel Marketing Association, Mark White, General Manager at Millennium & Copthorne, Jim Cockell, Group IT Solutions Director at National Express and chaired by Professor Peter Jones, MBE, Chair of the HOSPA Education Committee.



12.50 - 12.55	'5 Minutes of Fame'
12.55 - 13.00	Introduction to Educational Sessions
13.00 - 14.30	<b>Networking Buffet Lunch</b> - Sponsored by TigerTMS - An opportunity to visit the Hospitality IT Exhibition featuring some of the 'best in class' products and services.
14.30 - 14.45	Afternoon Opening Presentation
14.45 - 14.50	'5 Minutes of Fame'
14.50 - 15.35	<b>Hospitality IT Main Session</b> - 'Can outsourced IT Services really support the needs of Hospitality IT for both internal business requirements and guest services?' with Jeremy Ward, Senior Vice President of IT at Kempinski hotels, Chris Huggett, Senior Vice President at HP Networking Business EME, Raman (R.P.) Rama, Vice President and Chief Technology Officer/Chief Information Officer at JHM Hotels and President at HFTP, Paul Missen, Vice President Technology at EMEA at Mandarin Oriental Hotel Group, Joanne Stanford, Group IT Director at De Vere Group and chaired by Bryan Steele, HOSPA IT Chair.
15.35 - 15.40	'5 Minutes of Fame'
15.40 - 16.00	<b>Refreshment Break</b> - An opportunity to visit the Hospitality IT Exhibition featuring some of the 'best in class' products and services.
16.00 - 16.35	Educational Workshop Programme 1 (7 Parallel Workshops)
16.35 - 17.10	Educational Workshop Programme 2 (7 Parallel Workshops)
17.10 - 17.45	Educational Workshop Programme 3 (7 Parallel Workshops)
17.45 - 18.00	Conference Closing and Prizes
18.45 - 19.30	Delegate Pre Dinner Drinks Reception - Sponsored by Fourteen IP Communications
19.30 - Late	HOSPA Gala Conference Dinner - Sponsored by PKF - Pub Quiz and Dinner Entertainment





## HP and Fourteen IP Communications to sponsor and power HOSPACE 2012

HOSPA is delighted to announce that HP (Hewlett-Packard) and Lancashire based Fourteen IP Communications have agreed to be key sponsors and Event Technology partners for one of the UK hospitality industry's most acclaimed annual events – HOSPACE 2012 Conference and Exhibition, to be held on 22 November at the Sofitel London Heathrow, Terminal 5.

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As well as providing sponsorship and technology support to power HOSPA's HOSPACE 2012, HP and Fourteen IP Communications will be running two Educational Workshops at the event on 'Communications Network Solutions'. This will be part of the Conference and Exhibition's traditionally popular afternoon programme of industry specific educational workshops for hospitality finance, revenue management, IT and commercial professionals – all led by top specialists in their fields.

In addition, Hewlett-Packard's Chris Huggett – Sales Director HP Networking EMEA (Europe, Middle East and Africa) – will be one of the expert panellists participating in a HOSPACE 2012 'Hospitality IT Debate' entitled: 'Can outsourced IT services really support the needs of Hospitality IT for both internal business requirements and guest services?'

"We are delighted that HP (Hewlett-Packard) and Fourteen IP Communications are to be key supporters and technology partners for HOSPACE 2012," said HOSPA Chief Executive Carl Weldon. "Also we are very honoured that the two companies have agreed to support one of the Association's top three 2012 annual awards – the prestigious 'HOSPA Hospitality IT Professional of the Year' – to be presented in London at HOSPA's Annual Christmas Awards Luncheon on 19 December at the Park Plaza Westminster Bridge."

As in past years, HOSPACE will be held at the Sofitel London Heathrow, Terminal 5, and 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.

### Event Sponsors

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# Scholarship Winners

# HOSPA

Hospitality Finance, Revenue and IT Professionals  
Education & Training

We are very pleased to welcome to HOSPACE 2012 four aspiring hospitality students who have excelled in their current studies and have been nominated by their tutor to be considered for a sponsored scholarship place at HOSPACE 2012.

## This year's winners are:

**Andreas Holmes-Berge - Oxford Brookes University**

**Cara McElroy - Bournemouth University**

**Bianca Ruxandra Anghel - University College Birmingham**

**Kendra Dhakal - University of West London**

The prize comprises of a full day at HOSPACE on 22nd November 2012 plus a place at the Conference Dinner.



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## Howard Field Honoured with 2012 HFTP Paragon Award



**HOSPA Founder Howard Field** is recipient of top US '2012 Paragon Award' for significant and lasting contribution to Texas-based HFTP and Hospitality Industry worldwide

HOSPA is proud to announce that one of the Association's founder members and 2005 Lifetime Achievement Award winner, Howard Field, has received one of the most prestigious hospitality industry awards in the USA – the 2012 Paragon Award.

International Hotel Specialist Advisor Howard Field was honoured at the end of last month by HOSPA's strategic partner Texas-based Hospitality Financial and Technology Professionals (HFTP) for his significant and lasting contribution to HFTP and the hospitality industry worldwide – especially his expertise in, and advocacy of, the Uniform System of Accounts for the Lodging Industry (USALI), as well as other accounting systems.



Commenting on the 2012 Paragon Award – presented at HFTP’s recently held annual convention and tradeshow in Orlando, Florida – Howard Field said: “It was a great surprise and an honour to receive this award from HFTP. I have been fortunate in my career choice, which has enabled me to enjoy long and continuing relationships serving the financial management professional associations in the UK, USA and Hong Kong.”

Field is the author of guides to the USALI 9th and 10th editions, as well as other finance-focused reference books for the industry. His best known work is ‘A Practical Guide to the Uniform System of Accounts for the Hospitality Industry’. He is currently serving as the lead consultant, representing HOSPA Finance and Technical Committee, for the Global Hospitality Accounting System Users Guide, which is being produced by HFTP.

“There was no question that Howard deserved this honour, as he has been such an asset to our Association as we looked toward international expansion,” said HFTP Chief Executive Frank Wolfe, CAE. “With his assistance we have been able to collaborate with like-minded associations in the U.K., Europe and Hong Kong. And now, with our established international partnerships, we are on our way to producing a product of this great collaboration, the Global Hospitality Accountant Users Guide, with Howard as a lead consultant of course.”

HOSPA Chairman Paul Dukes, also Chairman at Kew Green Hotels, added: “We are delighted that Howard has been given this thoroughly deserved honour in recognition of such a long and

distinguished career where his expertise, integrity and personal dedication and commitment have earned him such enormous respect across the globe.”

A Founding Member of HOSPA when it was created as the British Association of Hotel Accountants (BAHA) in 1969, a former Council member and current advisor to HOSPA’s Finance and Technical Committee, Field has been at the forefront of setting and developing accounting standards for the hospitality industry worldwide.

He has worked in the hospitality industry for over 45 years. His first major appointment was as Finance Controller for the Royal Garden Hotel, London. This led to top financial posts with multiple hospitality companies – including Commonwealth Holiday Inns of Canada and The Savoy Group. In these positions, he experienced the challenge of finding and hiring good finance professionals. This resulted in him forming London-based FM Recruitment, specialists in financial personnel for the hospitality industry. In addition to his consultancy and advisory activities, he serves on the steering committee of the Savoy Society/Springboard Mentor Scheme, supported by HOSPA.

***For more information about HFTP, the Paragon Award or other HFTP awards, please visit [www.hftp.org](http://www.hftp.org).***

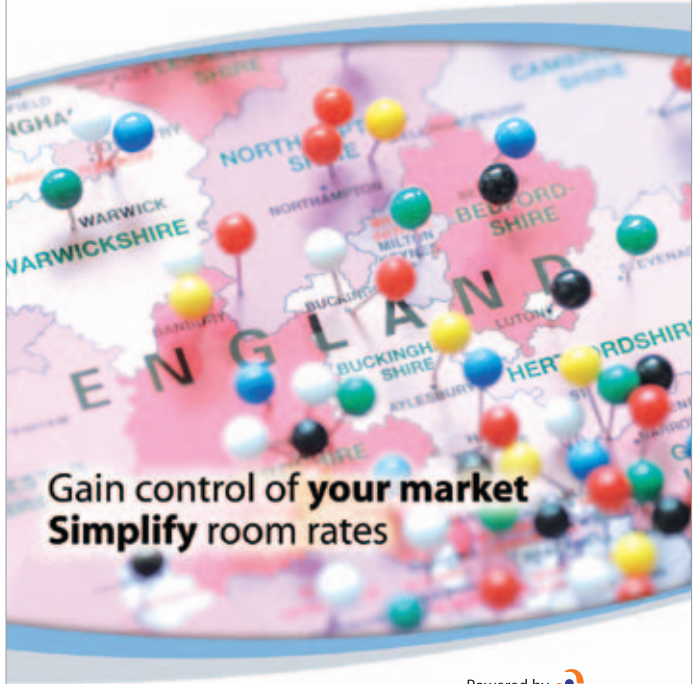



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# Are you ready for RTI?

Reported by **Debra Adams** based on the speaker notes.

On a chilly autumn evening in October, over 40 HOSPA members gathered at the offices of Mazars at Towerhill, London, to listen to an excellent and informative presentation on Real Time Information from Maggie Anderson at HM Revenue and Customs. This subject was essential listening for those working in finance and HR with responsibility for payroll reporting.

**F**rom **April 2013** almost all employers and pension providers will begin reporting their payroll information to HM Revenue and Customs (HMRC) on or before **every payday**.

The objectives of the RTI programme being introduced by HMRC are:

- to modernise and improve the operation of PAYE, to make it easier for employers, pension providers and more accurate for individuals
- to support the operation of Universal Credit when introduced in 2013 by the Department for Work and Pensions

The structure of PAYE remains unchanged but the way in which employers and pension providers send information about PAYE to HMRC is fundamentally changing.

The changes bring together payroll and payment processes which means that instead of sending all PAYE details in one go, at the end of the year, from April 2013 employers (or their accountant, bookkeeper or payroll bureau) will have to:

## History of PAYE

*The growing number of taxpayers during the Second World War led to the need for a more efficient tax collection system, and Pay As You Earn - PAYE - was introduced in 1944 as a result.*

*In place of annual or twice-yearly collections, tax was deducted by employers from wages weekly or monthly and an employee leaving work was given a P45 recording his or her code number, pay to date and tax paid to date to pass on to a new employer.*

*The British scheme had been piloted by Churchill's Chancellor Sir Kingsley Wood from 1940-41. On the day it was to be announced, Wood collapsed and died. But by the end of January 1944, fifteen million people - anyone earning £100 a year or more - had received notices telling them their code number.*

- send details every time a payment is made, at the time it is made
- use payroll software to send the details electronically as part of your routine payroll process

It will still be a requirement to pay HMRC by the 19th or 22nd of the month – or quarterly – but HMRC will continue to assess liability on a monthly basis.

## What are the main changes for payroll?

Current PAYE requires employers and pension providers to operate PAYE when employees/pensioners are paid, but report the information about the deductions annually. RTI reporting means that employers will send this information to HMRC each time the individual is paid – as part of a combined payroll and reporting process.

Your Payroll Software will send PAYE information electronically using the same channels that you currently use to send information to HMRC; either:

- over the Internet via the Government Gateway; or
- via Electronic Data Interchange (EDI)

## Preparing for RTI

It is essential that you use compatible software for this purpose. Talk to your software provider to ensure that you are using a version which will support real time reporting. If you are a small business with 9 or fewer employees then the updated version of HMRC's Basic PAYE Tools will suffice. If you make payments by Bacs using a unique 'Service User Number', you will need to include a cross reference in RTI submissions. Talk to your Bacs Approved Software Service (BASS) supplier to establish whether you will be affected by this.

Large employers and payroll bureau are encouraged to start PAYE reporting in real time early to:

- avoid End of Year reporting for 2012-2013; and
- benefit from more dedicated support

It is expected that more payroll software providers and products will join the pilot from November 2012. You should contact your software provider if you wish to participate in the pilot. Employers who change to software providers with payroll products in the pilot will be able to start submitting returns in real time from the date they change.

## What do you need to do?

- Update/acquire RTI-enabled software or use a payroll service provider:
- Do this as soon as possible
- Contact your payroll software developer/provider
- Consider new RTI-enabled payroll software
- Free RTI-enabled software products are available
- Use HMRC's Basic PAYE Tools (BPT)
- Ensure employee data is correct and complete with:
  - Full name
  - Date of birth
  - NI number
  - Gender
  - Address
- Review employee data and recruitment / payroll processes:
- Check details for your current employees

- Correct any gaps and inaccuracies
- Capture the correct information as soon as an employee joins
- Make use of the help available from your software provider, agent and HMRC

• Become familiar with what, when, and how you will have to report to HMRC:

- Employer Alignment Submission
- Full Payment Submission
- Most data items will be familiar...but some are new...and more new ones from April 2013
- Employer Payment Summary
- National Insurance number Verification Request

• Identify who you need to involve:

- Payroll Software provider/IT department
- Bacs Approved Solution Supplier/Bacs Approved Bureau
- HR
- Finance
- Employees
- Bureau/agent

A failure to implement the changes to PAYE reporting could lead to:

- employees not receiving the amount of Universal Credit to which they are entitled;
- employers and pension providers receiving unnecessary and unwanted

contact from HMRC on:

- personal data issues
- tax deduction issues
- benefit entitlement issues
- Tax Credit entitlement issues

Employers and pension providers who do not meet their statutory obligations run the risk of incurring penalties.

## Need help?

For more information visit the HMRC webinar 'Getting Ready for RTI' at: <https://www3.gotomeeting.com/register/847105886>

A copy of the slides from the presentation can be downloaded from the member's area on HOSPA website at [www.hospa.org](http://www.hospa.org)

Our thanks to Gareth Jones, Partner at Mazars for kindly hosting this event and providing an excellent buffet!

### Tips in recording employee information

Name	Date of birth	National Insurance number
<ul style="list-style-type: none"> <li>• Full forenames, not initials</li> <li>• Forenames and surname in the correct order</li> <li>• Make sure they are spelt correctly</li> <li>• Don't put titles in name boxes</li> </ul>	<ul style="list-style-type: none"> <li>• Always enter the correct date of birth</li> <li>• Enter the day, month and full year, such as 05/05/1985</li> </ul>	<ul style="list-style-type: none"> <li>• Always enter the correct NI number</li> <li>• Correct format - 2 letters, 6 numbers and a final letter - A, B, C or D</li> <li>• Verify from official documents</li> </ul>

Maggie Anderson and colleagues from the HMRC will be joining us at HOSPACE 2012 on 22nd November to provide conference delegates with an update on the requirements to maintain compliance with RTI reporting. The presentation will take place in the main conference room during the Education Programme in the afternoon.



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# Put learning on your **New Year's resolution list!**



The HOSPA Education and Training Programmes provide a framework for developing the skills and knowledge needed both at first line and middle management levels for those hospitality professionals focusing on developing their careers in finance, revenue management or IT. The suite of programmes, pitched at undergraduate level, has been specifically developed for the hospitality industry and recognises the increasing importance of encouraging employees to not only obtain appropriate qualifications but also to continue in full time work.

In October 2011, after a period of development funded by the Savoy Educational Trust, we launched our Education and Training Programme in Revenue Management, developed and accredited by Oxford Brookes University, and all three stages of this programme are now available. Feedback from our learners on the programme has been very positive and we are delighted to be able to now offer this programme alongside our longstanding Education and Training Programme in Finance and Accounting. The course fees for both programmes are £750 + VAT per stage.

We currently have over 85 learners studying with us from a diverse range of hospitality organisations both in the UK and overseas and if you have colleagues who would like to take part then the next intake for both these courses is February 2013. We look forward to welcoming learners from your organisation.

*For more information contact the Programmes Coordinator, Jane Scott at [jane.scott@hospa.org](mailto:jane.scott@hospa.org) or visit the HOSPA website at <http://www.hospa.org/>.*



## HOSPA

Hospitality Finance, Revenue and IT Professionals  
Education & Training

### Enrolling now for the HOSPA Education Programmes in Financial Management and Revenue Management for intakes for February 2013

The HOSPA Education Programmes provide a framework for developing the skills and knowledge needed at first-line and middle management levels. Our courses have been developed by leading educators in the appropriate field of expertise in conjunction with hospitality industry experts.

Ideal as a stand-alone education programme or one that can sit alongside your existing in-house training, this suite of courses is pitched at undergraduate level and acknowledges the increasing significance of encouraging employees to not only obtain appropriate qualifications, but also to continue in full-time work – earning while learning.

Studying in their own time, learners are supported by a study pack, online classroom resources including EBSCO and subject tutors, plus all learners are encouraged to have a work-based mentor. Our study materials utilise both contemporary terminology and professional examples from the industry, together with a mix of work-based and academic assessments. This means that learners can apply what they learn directly to their workplace.

Each programme is studied in three separate stages, each taking six months to complete. Each stage costs just £750 + VAT.

*For more information call Debra Adams, Head of HOSPA Education Services, on 01202 842809 or visit the HOSPA Education pages at: [www.hospa.org/education/education-and-training-programmes](http://www.hospa.org/education/education-and-training-programmes)*





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# → Keystep supplies EPoS terminals to Gatecrasher

In order to cope with the anticipated influx of customers; Gatecrasher has purchased 10 new EPoS terminals for their flagship hyper-club Gatecrasher Birmingham.

As the 2012 new academic year approached, Gatecrasher looked for ways to improve the speed at which it could serve customers, and decided to install 10 new EPoS terminals in time for the particularly busy period of students returning, and the traditional annual party night celebrating Threshers week.

As existing partners who already support EPoS systems at other Gatecrasher venues, Keystep Limited were perfectly positioned to help, configure and install the additional 10 EPoS terminals at a fast pace, ensuring all the units were fully operational in time for the 4,000 party goers expected to attend the Threshers Week Party Night.

Taking the total number of terminals at the venue to 45, Keystep's Managing Director Andrew Evans comments; "By bolstering Gatecrasher's EPoS systems, we have helped them to provide an increased level of service to their clientele. For Keystep, this is another industry leading leisure and hospitality



brand where we have delivered a solution that not only provides the opportunity for an increase in sales revenue, but allows guests to experience a more efficient service - and that's what we are here to do".

Evans continues: "Gatecrasher Birmingham opened in 2008 and this September will host a series of special events to celebrate its 4th birthday, so the timely delivery of the additional robust EPoS terminals will work well to support the club, allowing them to focus on their next anniversary and keeping the Gatecrasher brand at the forefront of the clubbing industry".

*For more information, please contact Tanya Stadler, Marketing Officer: tanya.stadler@keystep.org | Office: 08443-510805 | Mobile: 07834-599768 Or visit: www.keystep.org*

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## UK CHAIN HOTELS MARKET REVIEW - September 2012

### Post-Olympic depression dispatched by London hotels

London hoteliers dispelled any rumours of a post-Olympic depression as occupancy levels rose by 3.1 percentage points to 89.4% in the months of September according to the latest HotStats survey by TRI Hospitality Consulting.

Despite a year-on-year decline of 3.2% in average room rate from £141.82 to £137.26, the increase in occupancy levels resulted in a 0.6% increase in Revenue Per Available Room (RevPAR) for the month. During the same period, Total Revenue per Available Room (TrevPAR) increased by 1.3%, underpinned by a strong increase in non-rooms departmental revenue of approximately 19%.

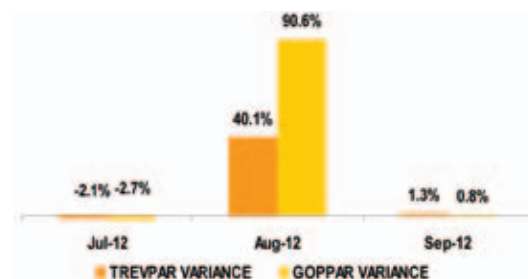
“Whilst there were rumours of a potential post-Olympic slump as experienced in previous host cities, which appeared even more plausible if you take the challenging economic environment into account, London hoteliers have responded with the strongest September occupancy performance recorded since HotStats began capturing data for the London full-service hotel market,” said Jonathan Langston, managing director at TRI.

The strong performance can, in part, be attributed to London hosting the most successful Paralympic games in history, drawing record breaking crowds to stadia and event venues; but the capital also witnessed a late increase in visitors as data from our unique HotStats benchmarking service reveals that the increase in occupancy levels was underpinned by a 22% increase in leisure-related demand, whilst corporaterelated demand has remained softer year-on-year.

As a result of the robust growth in non-rooms revenue for London full-service hotels, Gross Operating Profit per Available Room (GOPPAR) for the month increased by 0.8% to £86.41. The growth in profit levels were softened by rising costs, in particular travel agent commissions (4.5%) and utilities (8.1%).

“As always, London continues to exceed expectations. Whether it be in putting on potentially the greatest Olympic and Paralympic games ever or bucking the historic trend of a post-Olympic slump, London hoteliers have benefited directly from a strong summer of events. Despite the initial slump in headline performance figures during June and July, the strong start to the year in addition to the performance in August and September has almost guaranteed that year-on-year performance for London hotels in 2012 will be up on 2011, as profit levels have already increased by 6.6% in the calendar year” said Langston.

#### LONDON LAST 3 MONTHS YEAR-ON-YEAR CHANGE



#### HotStats London Main KPIs

LONDON

	Sep '12	Sep '11	Var b/w		Sep '12	YTD '12	YTD '11	Var b/w	
Occ %	89.5	86.3	3.1	▲	Occ %	81.1	81.7	-0.7	▼
ARR	137.87	142.07	-3.0%	▼	ARR	138.37	131.56	5.2%	▲
RevPAR	123.33	122.65	0.6%	▲	RevPAR	112.17	107.55	4.3%	▲
TrevPAR	166.75	164.66	1.3%	▲	TrevPAR	151.70	144.86	4.7%	▲
Payroll %	21.8	21.5	-0.2	▼	Payroll %	23.6	24.0	0.4	▲
GOP PAR	86.40	85.75	0.8%	▲	GOP PAR	73.65	69.12	6.6%	▲

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

## Back to the old routine for Provincial hoteliers

As a result of the flat RevPAR performance in the month of September, the UK Provincial hotel market GOPPAR performance declined by 1.6%, already making the gains experienced in August a distant memory according to the latest HotStats survey.

Occupancy levels during the month of September increased by 2.5 percentage points from 77% to 79.5%, primarily underpinned by an increase in leisure-related demand (+16%). However, any anticipated increases in RevPAR were short lived as the growth in volume was cancelled out by a by 3.1% drop in achieved average room rate to £72.16.

Despite the flat RevPAR performance, as a result of the increase in volume non-rooms revenue at Provincial hotels experienced a 0.7% increase and ensured that TrevPAR growth remained positive at +0.3%.

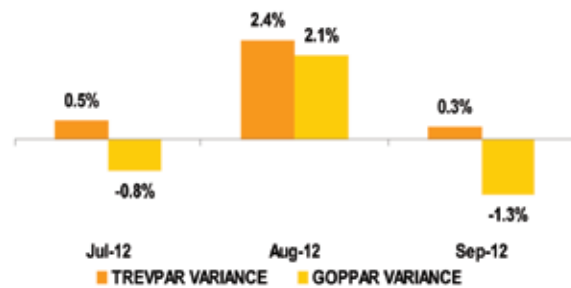
Despite the UK inflation rate being at its lowest in nearly three years at +2.2% in September, rising costs continue to hamper the efforts of hotel managers to record profit growth. This month witnessed year-on-year increases in utility (+7.3%), food (+0.6 percentage points) and payroll costs (+0.3 percentage points), which, for the most part, are out of the control of hotel managers.

As a result of the movement in revenue and costs, GOPPAR has once again declined by 1.6% to £36.55 and by 3% to £26.00 for the calendar year.

“Unfortunately there appears to be no respite for Provincial hoteliers and we anticipate that profit levels will continue to

erode as food prices are set to soar with adverse weather conditions over the summer having blighted UK harvests. Furthermore, energy suppliers such as Npower and British Gas are set to increase their gas and electricity prices well above the rate of inflation before the end of this year by as much as 9%. Coupled with a sustained economic recession which continues to have a negative impact on key hotel demand generators, the prospects for the provincial hotel market are not bright.” said Langston.

PROVINCES LAST 3 MONTHS YEAR-ON-YEAR CHANGE



### HotStats Provinces Main KPIs

PROVINCES	Month-over-Month Change				Year-over-Year Change			
	Sep '12	Sep '11	Var b/w		YTD '12	YTD '11	Var b/w	
Occ %	79.5	77.0	2.5	▲	70.8	70.2	0.6	▲
ARR	72.11	74.51	-3.2%	▼	69.73	69.41	0.5%	▲
RevPAR	57.31	57.34	0.0%	▼	49.38	48.75	1.3%	▲
TrevPAR	106.33	106.00	0.3%	▲	92.12	91.63	0.5%	▲
Payroll %	29.6	29.3	-0.2	▼	32.7	32.6	-0.2	▼
GOP PAR	36.62	37.12	-1.3%	▼	26.01	26.81	-3.0%	▼



## HOTSTATS Briefing Data

UK Chain Hotels - Performance report Currency: £ Sterling



### The month of September 2012

	Sep '12	Sep '11	Var b/w	
<b>TOTAL UK</b>				
Occ %	83.1	80.3	2.7	▲
ARR	97.64	100.71	-3.0%	▼
RevPAR	81.12	80.91	0.3%	▲
TrevPAR	128.12	127.17	0.7%	▲
Payroll %	25.9	25.7	-0.2	▼
GOP PAR	54.57	54.67	-0.2%	▼
<b>LONDON</b>				
Occ %	89.5	86.3	3.1	▲
ARR	137.87	142.07	-3.0%	▼
RevPAR	123.33	122.65	0.6%	▲
TrevPAR	166.75	164.66	1.3%	▲
Payroll %	21.8	21.5	-0.2	▼
GOP PAR	86.40	85.75	0.8%	▲
<b>PROVINCES</b>				
Occ %	79.5	77.0	2.5	▲
ARR	72.11	74.51	-3.2%	▼
RevPAR	57.31	57.34	0.0%	▼
TrevPAR	106.33	106.00	0.3%	▲
Payroll %	29.6	29.3	-0.2	▼
GOP PAR	36.62	37.12	-1.3%	▼

### The Calendar year to September 2012

	YTD '12	YTD '11	Var b/w	
<b>TOTAL UK</b>				
Occ %	74.5	74.3	0.1	▲
ARR	96.38	93.82	2.7%	▲
RevPAR	71.78	69.75	2.9%	▲
TrevPAR	113.38	110.65	2.5%	▲
Payroll %	28.4	28.6	0.2	▲
GOP PAR	43.00	41.92	2.6%	▲
<b>LONDON</b>				
Occ %	81.1	81.7	-0.7	▼
ARR	138.37	131.56	5.2%	▲
RevPAR	112.17	107.55	4.3%	▲
TrevPAR	151.70	144.86	4.7%	▲
Payroll %	23.6	24.0	0.4	▲
GOP PAR	73.65	69.12	6.6%	▲
<b>PROVINCES</b>				
Occ %	70.8	70.2	0.6	▲
ARR	69.73	69.41	0.5%	▲
RevPAR	49.38	48.75	1.3%	▲
TrevPAR	92.12	91.63	0.5%	▲
Payroll %	32.7	32.6	-0.2	▼
GOP PAR	26.01	26.81	-3.0%	▼

### The twelve months to September 2012

	Rolling '12	Rolling '11	Var b/w	
<b>TOTAL UK</b>				
Occ %	73.8	73.7	0.1	▲
ARR	96.01	94.18	1.9%	▲
RevPAR	70.87	69.44	2.1%	▲
TrevPAR	113.79	112.10	1.5%	▲
Payroll %	28.2	28.3	0.1	▲
GOP PAR	43.41	43.18	0.5%	▲
<b>LONDON</b>				
Occ %	80.9	81.9	-1.0	▼
ARR	137.37	131.69	4.3%	▲
RevPAR	111.14	107.91	3.0%	▲
TrevPAR	152.29	147.91	3.0%	▲
Payroll %	23.6	23.8	0.3	▲
GOP PAR	74.31	71.64	3.7%	▲
<b>PROVINCES</b>				
Occ %	69.9	69.2	0.7	▲
ARR	69.43	69.50	-0.1%	▼
RevPAR	48.52	48.07	0.9%	▲
TrevPAR	92.42	92.21	0.2%	▲
Payroll %	32.5	32.3	-0.2	▼
GOP PAR	26.25	27.37	-4.1%	▼

#### TRI Hospitality Consulting

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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

- 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.
- 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 (finishing at approx. 10.00am) and is to be held at PKF, Farringdon Place, London
- Nov 22** **HOSPACE 2012 - Sofitel Hotel, Terminal 5, Heathrow, London**  
For details, including the outline programme and registration, please visit [www.hospace.net](http://www.hospace.net).
- 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.

- Dec 19** **HOSPA Annual Awards Lunch 2012 - Park Plaza Westminster Bridge, London**  
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.
- Jan 13** **Evening Members' Meeting - London**  
**Owner - Operator disputes continued... management contracts**  
This event is from 6.00pm for a 6.30pm start. Presented by Felicity Jones, Watson, Farley & Williams LLP. Further details and venue will be released in due course.

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](mailto:wayne.gosden@hospa.org) with your details.



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# HOSPA *Annual Awards Lunch*

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



***Come and celebrate with HOSPA! Enjoy a delicious seasonal lunch at the Association's Annual Awards Ceremony with awards for 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.***



**To find out more please contact Wayne Gosden at HOSPA**

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