

# THE OVERVIEW

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## Disloyalty programme - building a relationship with your guest



Professional Development results  
Guests get personal

# Welcome to THE OVERVIEW

The Overview comes to you this month with lots of exciting Trick or Treat costume ideas, courtesy of the new 31st October Brexit deadline, which, yes, may well be a case of can kicking, but has given us all a breather from the relentless daily voting.

While the news may give many in the hospitality sector a similar chance to catch a break, as consumers decide to firm up their summer plans, it still means something of an overstated pause for most operations wondering what they should be doing in terms of investment.

What is reassuring despite the uncertainty is that many in the sector are continuing to battle the many slings and arrows to pursue a life of hospitality. Testament to that is the rapid growth of India-based OYO, which announced that it expected to open its 50th hotel in the UK by the end of the month. Since launching in the UK in October last year, OYO has opened 30 hotels across the UK - including properties in London, Birmingham, Manchester, Blackpool and Edinburgh.

The India-based group, which is the sixth-largest hotel company in the world - and was recently invested in by Airbnb - works with independent hotels to improve their performance and enhance the customer experience, through a platform-plus model which provides distribution and very light branding which, for many stressed owners, is a last roll of the dice before bowing out. We watch the space with interest to see if the UK is the best location for the brand, but anything offering independents hope bodes well for the future of our multifaceted industry.

I would also like to take this opportunity to wish Jane Scott, Programmes Coordinator at HOSPA's professional development team, the best of luck in her new role. There is a more fitting tribute from Jane's colleague Debra Adams on p.6, but, as Jane leaves us to open a haberdashery shop, I can but quote Dinah Shore's seminal 1948 hit Buttons and Bows: "Let's go where I'll keep on wearin' Those frills and flowers and buttons and bows".



*Katherine Doggrell*

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# HOSPA

Hospitality Finance, Revenue and IT Professionals

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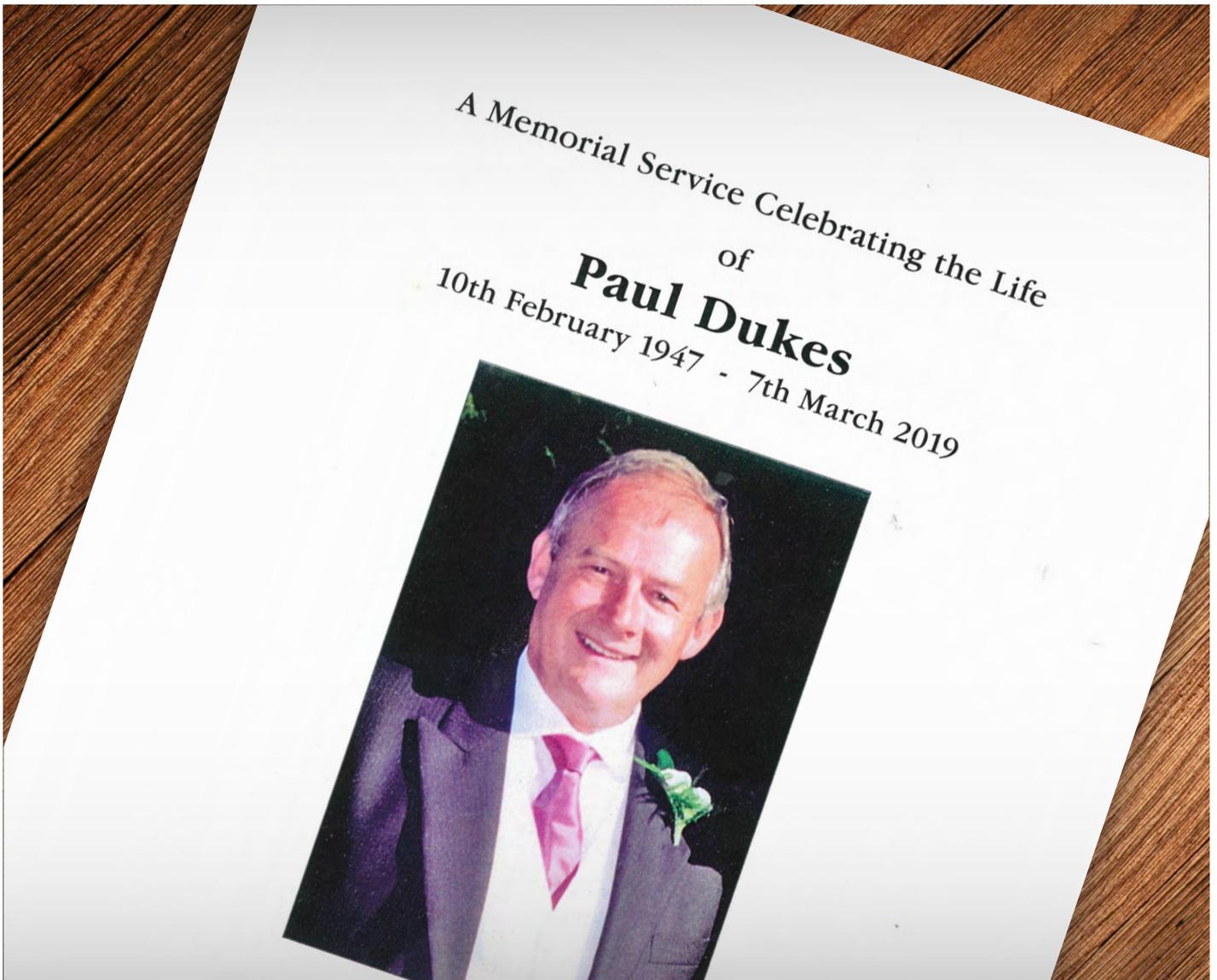
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## Farewell to Paul Dukes



### HOSPA CEO Jane Pendlebury looks back of the celebration of Paul Dukes' life.

Thank you so much for your kind comments on the obituary for Paul Dukes in last month's The Overview.

Although the obituary covers Paul's wide-ranging contribution to HOSPA and the hospitality industry in general, I wanted to take the opportunity to reflect on his memorial service.

A group of us travelled to Topsham in Exeter in early April for the service to celebrate his life and, as you would expect, the church was packed! The readings and tributes from his family, friends and work colleagues were all heartfelt yet full of fun, offering a true reflection of Paul and who he was. The Order of Service was touchingly adorned with hand drawn pictures from his grandchildren. The singing of the hymns (Praise, my soul, the King of Heaven and Jerusalem) were belted out by the congregation in honour of Paul. A collection was made for The British Heart Foundation. Donations can still be made online at [www.bhf.org.uk](http://www.bhf.org.uk).

Afterwards we went on to the University of Exeter where the sheer volume of well-wishers far exceeded the number of

car parking spaces! As many of us drove round and round eventually finally finding spots here, there and anywhere, we pictured Paul chuckling at us all. I've no doubt he would've been highly amused by the scene. It was worth the parking delay though, as inside Reed Hall we met many of Paul's friends and, most importantly, his wife Sue. The sun was shining, the children were playing on the lawn outside - it was an uplifting atmosphere worthy of our friend.

We shall miss Paul dearly, but it was wonderful to be able to share and celebrate in his life.

To touch back onto HOSPA's current activity briefly though before I conclude, it will soon be May - the month of bank holidays and school half terms. Please keep your eyes open for emails from HOSPA and let us know if you are not receiving regular updates from us. We have a great event on energy management planned for 14th May at the Jumeirah Carlton Tower - and an event for our Scottish members on 26th June in conjunction with Criton. There is a big celebratory party planned for July, so keep opening the emails!



## Antonio Sans Cluster Revenue Manager with STAY Properties

This month we feature Antonio Sans, Cluster Revenue Manager with STAY Properties. Antonio achieved the highest marks for his studies on Level 1 of the HOSPA Introductory Revenue Management course completed in February 2018.

Hailing from Mallorca, Antonio describes hospitality as being 'in his veins'. Starting out at a family beach restaurant and apartment complex, Antonio has nurtured a passion for the industry from those early days. Since then his career has flourished and he's taken a wide-ranging path that has seen him earn a degree in European Tourism from the University of Lincoln, as well as being a certified hospitality supervisor via the Educational Institute, American Hotel and Lodging Association in Orlando, Florida.



Antonio (right) receiving his award from HOSPA President, Harry Murray

In his current role for STAY, Antonio recognised the potential of a very exciting project, where he had the chance to make a big impact in an environment that valued learning and development - an outlook which allowed him to take part in HOSPA courses.

Upcoming projects include the opening of their first UK property, STAY Camden (Aparthotel of 214 units) and new properties in

Madrid and Barcelona, all of them under the newly created STAY Lifestyle Brand (part of Labtech London Ltd).

Of his time as a HOSPA learner, Antonio said:

"The HOSPA course allowed me to gain additional knowledge about Total Revenue Management, while using different assignments to apply theoretical knowledge to my current set of properties. It also provided access to an impressive set of learning resources, with the opportunity to share thoughts and ideas with fellow students and course teachers. The HOSPA conference and events are also a great way to ensure that I'm up to date with the current market conditions and trends, something that's really important given that we work in such a dynamic industry."

Antonio is looking to continue his learning in future to become an even better Revenue Manager, to help STAY reach the next level as he guides them towards maximised revenue, improved profitability and a larger market share. He has his eyes on a Revenue Director role in the years to come and is looking forward to helping others on the team with their development.

The Introductory Revenue Management course is studied over a period of five months during which learners will develop their knowledge of the following topics:

- Understanding supply and demand
- Establishing prices and forecasting demand
- Applying the Value Matrix
- Managing inventory, price and distribution
- Performance measurement and evaluation of results

We are now enrolling for the next intake to the HOSPA Revenue Management courses commencing in September 2019. For more information email us at [education@hospa.org](mailto:education@hospa.org) or visit the HOSPA website at [www.hospa.org/education](http://www.hospa.org/education)

# Education & training programmes, September 2018



Congratulations to the following learners who successfully passed the course-work assignments and examinations for the September 2018 programme, completed in February 2019.

## Financial Management, Stage One

- Martin Cardamone, Grosvenor House Suites by Jumeirah Living
- Jennifer Grant, Fairmont St Andrews
- Vrashiket Kadam, Hilton International LLC - Foreign Branch
- Laxman Singh, Jumeirah Beach Resort LLC
- Sarunas Spakovas\*, The Sloane Club
- Helen Warren, De Vere Hotels
- Andrew Wilkins, De Vere Limited
- Sandra Wright, Chewton Glen Hotel

## Financial Management, Stage Two

- JeanMarie Berthelot, Hilton Mauritius Hotel & Resort
- Simon Bickle\*, Crowne Plaza Plymouth
- Paula Coimbra, Jurys Inn Aberdeen
- James Daniel, Clayton Hotel Cardiff
- Giuliano Marruso, De Vere Selsdon Park Hotel & Golf Club
- Ola Olabisi, De Vere Ltd
- Magdalena Piwnicka, Jurys Inn Aberdeen Airport
- Jelmer uit de Bos, Hilton Rotterdam
- Micaiah Williams, Mount Cinnamon Resort Grenada

## Financial Management, Stage Three

- Maria Gutierrez Mondragon\*, Norton Park Hotel
- Melanie Hess, Queens Hotel Leeds
- Fatai Muritala Isola, Anantara The Palm - Dubai

## Revenue Management, Level One

- Amy Braund, The Bingham Hotel
- Lucy Bright, Hotel Miramar
- Molly Brown, Rateview Ltd
- Guilbert Clatot, Hotel d'Angleterre SA
- Alessandro D'Ambrosio, The Park City Grand Plaza Kensington
- Remi Gasset, Studying independently
- Viktorija Goncarova, The Cavendish London
- Anna Hewer, Bluestone Resorts Ltd
- Atma Hyett, Drakes of Brighton

- Carl Johnstone, The Gleneagles Hotel
- Lauren Kinsey, Rateview Ltd
- Leanda Laughey\*, Coombe Abbey Hotel
- Horacio Mento, Flex (Flextronics UK)
- Liam Welsby, Jurys Inns

## Revenue Management, Level Two

- Sarah Artis, Best Western Ship Hotel
- Miriam Diaz, The Chine Hotel
- Zoe Edhouse, Whittlebury Hall Hotel & Spa
- Sonata Girdvainyte, King Solomon Hotel
- Jason Gossop, Skyland Hotels
- Justyna Grzyb, Accor
- Claire Hemphill, Whittlebury Hall Hotel & Spa
- Kannan Nair, Cairn Hotel Edinburgh
- Louise Nelson, Carden Park Hotel
- Annamaria Nemeth, Quantum Hotel Group
- Antonio Sans, STAY
- Kasia Serafin\*, CitySuites Manchester
- Bogusz Topolnicki, Best Western Swiss Cottage Hotel

## Revenue Management, Level Three

- Iris Ambuhl, Headland Hotel
- Neil Baker, Hoseasons / Wyndham Vacation Rentals
- James Bryan, The Eventa Group
- Andrew Bunting\*, Amaris Hospitality Limited
- Kris Franklin, Amaris Hospitality Limited
- Cameron Henderson, Dakota Deluxe Leeds
- Bruno Le Coze, Clarion Hotel St Albans
- Alina Minut, The Landmark London
- Joanna Monteith, Danesfield House Hotel
- Rhys Mulligan, Apex City of London Hotel
- Kannan Nair, Cairn Hotel Edinburgh
- Christina Ray, Best Western Hotel Rembrandt
- Lorna Saunders, Moor Hall Hotels Group
- Balazs Toth, Mount Murray Golf Club & Spa

\* Highest Grade Achieved

## Jane's new thread



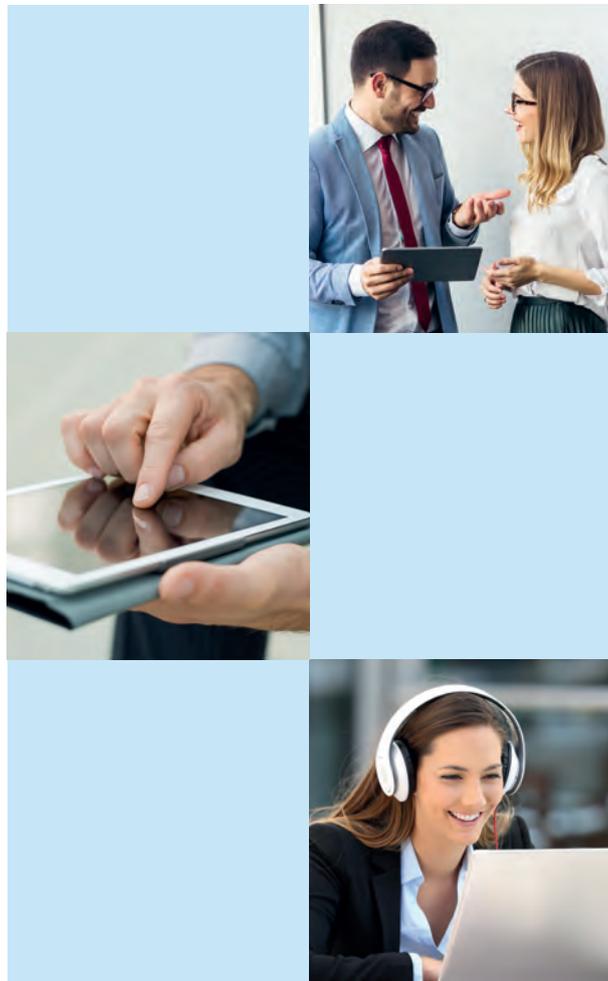
This month we say a sad farewell and good luck to HOSPA Programmes Administrator, Jane Scott, who is based at the HOSPA Professional Development Office in Wimborne, Dorset.

Jane leaves us after almost 20 years of supporting various HOSPA activities including the redevelopment of the HOSPA course materials for all the courses over the years, taking fabulous care of all our students on the HOSPA Revenue and Finance Management courses, managing the HOSPA invoicing and purchase ledger, taking part at HOSPA Conferences and Events and much much more besides! Jane is leaving us to follow her passion for all things crafted and sewn and is very excited

to be the new owner of a haberdashery store in Southbourne in Dorset. If you are on the south coast this summer why not drop in to her Treasure House in the high street and say hello!

Jane will be sorely missed by everyone at HOSPA, all of whom have been supported over the years by her efficiency and service, always given with a smile!

We wish her all the very best for the future!



# HOSPA

The Hospitality Professionals Association  
Professional Development

## Study with us on our flexible online programmes in Hospitality Finance

The HOSPA Financial Management and Accounting programme is the only online course of its kind providing finance managers in hotels, restaurants and leisure with an industry specific in-depth [programme of study](#).

The course is focused on the requirements of the sector combining best practice from the Uniform System of Accounts for the Lodging Industry with statutory accounting. Studying with us:

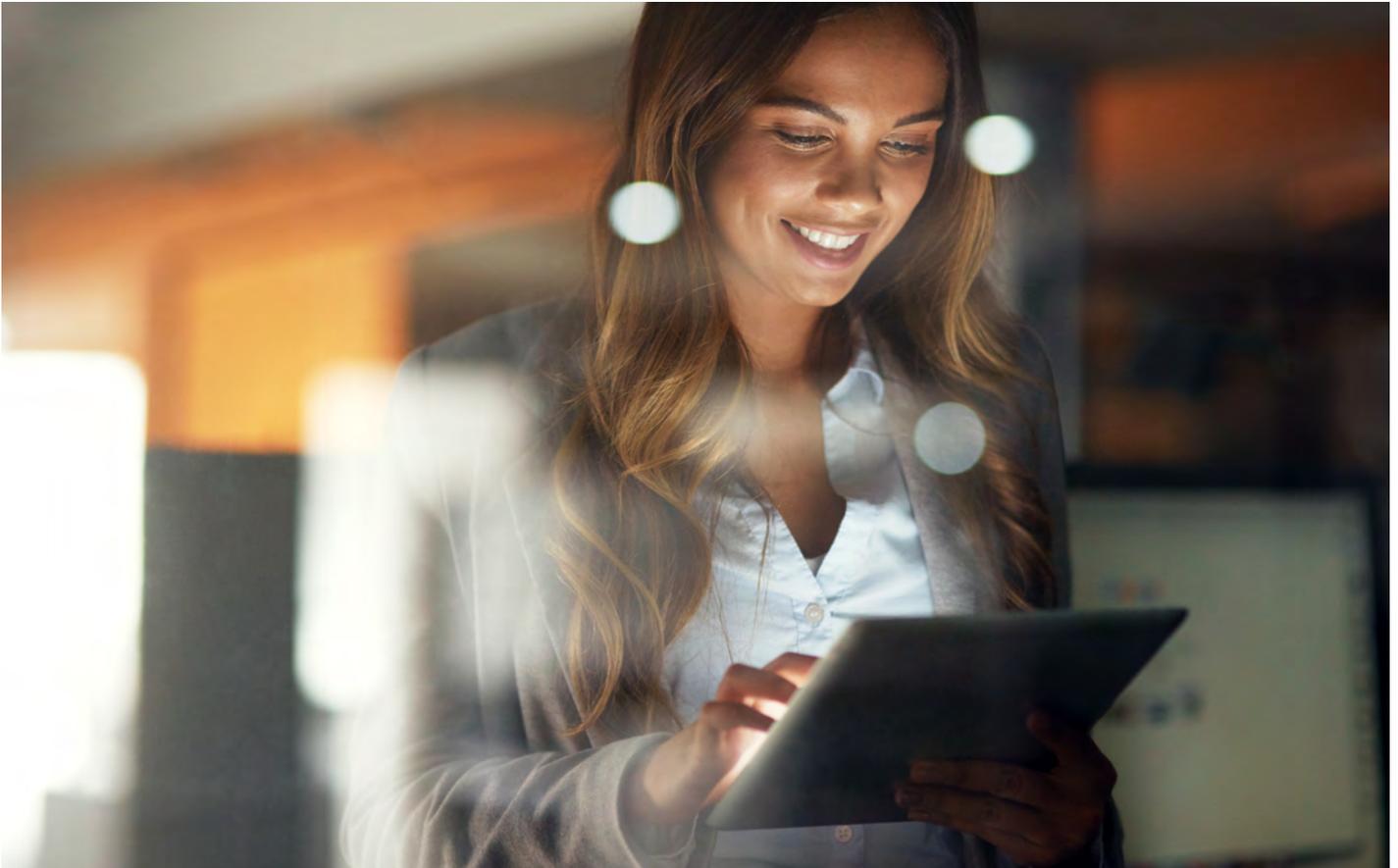
- ✓ Is very easy - all the materials are [online](#) and you receive expert tutor support
- ✓ Develops the [skills and knowledge](#) to manage a hospitality finance department
- ✓ Gives exemption from the CIMA Certificate in Business Accounting, Papers 1 & 2
- ✓ Leads to HOSPA Associate (Cert Finance) [membership](#) of HOSPA on completion
- ✓ Is convenient and relevant to your career in hospitality finance
- ✓ Costs just £820 + VAT per stage



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# Think like a guest: improving brand awareness, guest satisfaction and loyalty with Avvio's latest eBook



**Global technology provider Avvio has released an eBook to provide hoteliers with the know-how to boost brand awareness and delight guests from the start of their booking journey.**

The eBook, *Think like a Guest*, highlights the need for hotels and other accommodation providers to implement a multi-faceted, guest-centric approach to deliver personalised user journeys across their digital platforms in order to drive direct booking revenue.

The experts at Avvio have been researching and developing personalisation within hotel websites since 2009, culminating in the release of its AI booking engine Allora after years of data collection and analysis.

In 2018, Avvio released a number of whitepapers including *The 6 Principles of Personalisation for Hotel Websites* to demonstrate the best way to optimise a hotel's digital profile and how to start proactively integrating AI into websites to take back market shares from OTAs.

This recently launched eBook is the next instalment in Avvio's commitment to supporting technology education within the hospitality sector and growing awareness of the importance of personalisation and the experience offered to guests in supporting greater channel shift to direct bookings.

Positioned as a tool for maximising direct revenue that utilises up-to-date industry statistics and research, the free-to-download

article encourages hoteliers to put on their metaphorical thinking caps and review their digital offering from the perspectives of their guest. They need to be able to think like marketers and analysts, as well as millennials and designers.

On the release of the eBook, Avvio co-founder and CEO Frank Reeves said: "We know that being a hotelier can be tough and even more so with the constant evolution and digitisation of the sector.

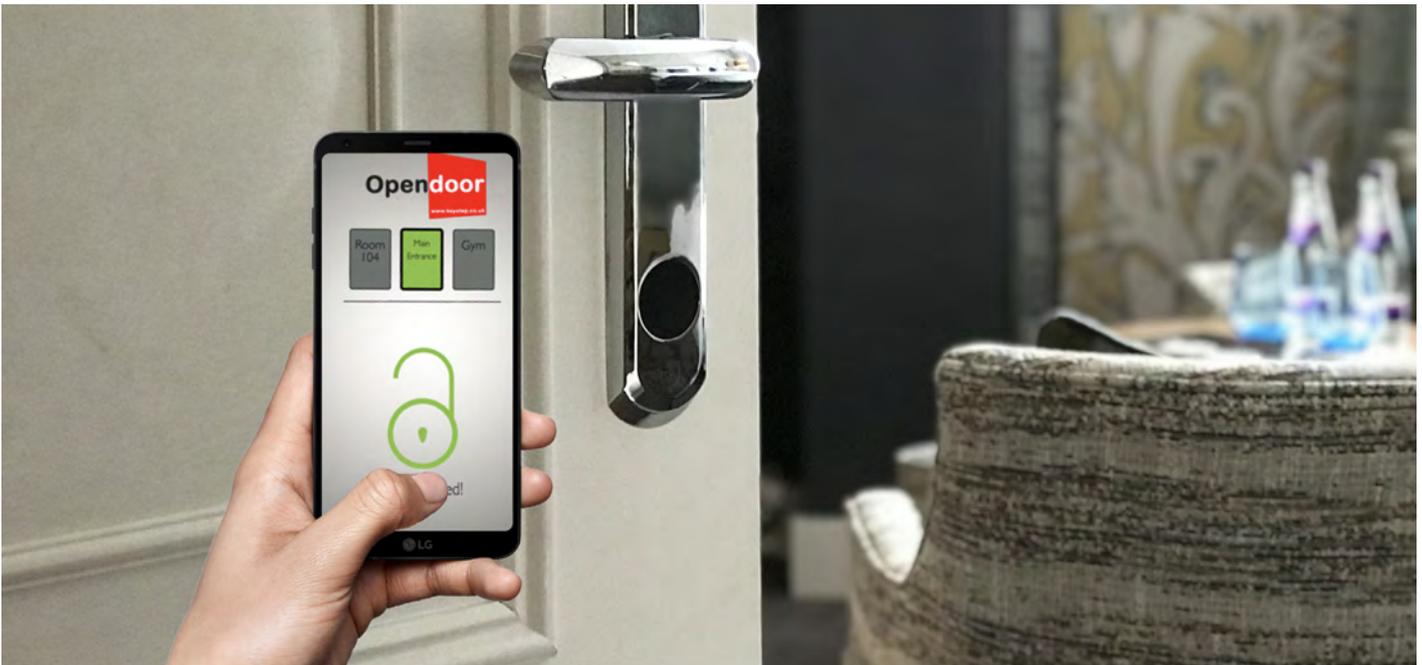
"With *Think like a Guest*, we're asking hotels and accommodation providers to question how their guests are engaging with their brand.

"It's so important to start getting to know your potential guests from the first interaction they have with your hotel and then to continue to maintain that relationship by providing them with a personalised customer journey from that point onwards.

"If you want to learn a more about optimising your hotel website, nurturing your existing customer base, capitalising on the latest AI technology or appealing to millennials, we hope our eBook will be a useful tool for providing an exceptional guest journey from the beginning."

The eBook is available online on Avvio's website, [www.avvio.com](http://www.avvio.com)

## Long live RFID, Magnetic Card is coming to an end



Locking systems and keys for hotels are undergoing a rare paradigm shift from the old style Magnetic Strip to RFID contactless technology. This will dramatically increase the security and reliability of the locks. It also opens up the much-anticipated reality of guests using their phone to unlock their bedroom door and bypass the reception desk completely. This will mean integration with booking and Property Management Systems and a change to the guest journey unlike anything the industry has had to deal with before.

The industry will be forced to face challenges that have been disregarded over the last decade. Failing legacy mag card systems with no upgrade path, the end of support for Windows 7 and rising guest expectations means that operators who have managed with their old mag card system will almost find it impossible to operate their hotels within the next three to five years if they don't make the move to the next generation of RFID locks. Senior decision makers therefore need to start planning for the capital expenditure and implementations they will have to carry out over the next few years.

With locks having evolved little over the last 20 years, the industry is heading for a huge change, but it doesn't appear to be prepared - in terms of process, or technology. It's going to be a revolution, not evolution, and with any revolution there will be casualties.

When Tor Sørnes patented the first electronic keycard lock, he created a new market for programmable locks and the potential for a range of authentication methods. Half a century later, it seems we are only now starting to glimpse the real potential for electronic lock technology.

Locks are transitioning from being isolated dumb devices to interconnected intelligent devices and the future revolves around the smartphones that most of us carry in our pockets.

For those working at any level in hospitality this brings several challenges, from keeping legacy systems running to managing the move to new solutions and the constant battle to keep systems secure in our digital world.

Perhaps most obvious is a guest's expectation that hotel services provide as high a level of quality and reliability as possible. This rings especially true for a hotel's security abilities where,

thanks to widespread news coverage, guests are often just as informed about the latest product flaws and fixes as hoteliers are themselves. With guest satisfaction resting on the initial ability to obtain full peace of mind within their surroundings, properties must consider that a failure to update vulnerable security equipment can readily be recognised by guests and interpreted as a severe lack of consideration on the part of the hotel. Such guests may voice their dissatisfaction by taking their business elsewhere, forging relationships with those hoteliers that adequately address their safety needs.

Many hotels see the door access system simply as something there to let guests in their rooms, and do not actively manage the system. Due to the makeup of the door entry system which is part mechanical and part IT system, its responsibility can be difficult to pin point. Is it maintenance? Front desk? Or the IT department? In many cases, no one takes responsibility for this mission critical system. You have to look beyond "it's just a system for letting guests in to rooms"; it is probably one of the most critical systems you have in your hotel after power and water! As guests become more tech savvy and self-sufficient in their travel habits, technology to enable seamless, faster check-in and room entry will become a necessity in a modern hotel.

Our advice is to start planning now. If you operate multiple properties then you need to start setting aside considerable financial and technical resources as transitioning from Mag Card to RFID locks requires investment. No doubt there will be a rush for the exits as the hospitality sector finally has to act and it could be that the new locks, but more critically the resource to install them, become short in supply.

Andrew Evans | CEO, Keystep Solutions

## Building guest relationships in an age of disloyalty



**As hospitality businesses we understand and recognise the role that loyal customers play in our commercial success, which is why (according to a recent study by Accenture) over 90% of companies actively invest in loyalty programmes. However, two in three customers say these programmes do not engender loyalty, leaving us with a dynamic modern-day puzzle to solve.**

In recent times, the vast array of products and services available to consumers, tough economic conditions, and dwindling trust in big businesses have all contributed to the challenge of building customer loyalty. So, as customer loyalty becomes a more elusive target for businesses, what can be done from a customer service perspective to build relationships in an “age of disloyalty”?

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#### Say what you mean, and do what you say

Consistency, predictability, reliability, transparency...we don't always consider these traits when thinking about customer loyalty, but they are so integral in building trust in just about any type of relationship (friendship, romance, family, work etc.). If we say one thing, and do another, or if our responses to similar situations are inconsistent, it creates doubt and dilutes trust...pushing the goal of achieving customer loyalty even further from reach.

Although it would be difficult to cover all “trust-building attributes” here, there are a number of ways to maintain consistency in customer service to help preserve the customer relationship. Implementing the correct measurement criteria, for instance, along with standardising workflows and processes would all contribute to regularly delivering the kind of service that your customers are promised, and subsequently expect.

If, for example, a customer calls your contact centre and the query is resolved immediately during the call, the customer would be frustrated if it took a week to resolve a similar email-based request made to the same contact centre. Ultimately the specific contact channel used is irrelevant to the customer, but your approach to managing and measuring service levels on all your contact channels should be cohesive and consistent. This will ensure that your customers always receive the same great service safe in the knowledge that they can trust your business time and again.

## “Great” expectations

To avoid disappointing customers, we have often been told to “under promise and over deliver”. While this is traditionally viewed as a safe approach, it doesn’t necessary reflect the current needs and attitudes of the archetypal modern consumer. Customers are spoiled with choice, hard to impress, more demanding than ever, and expect constant feedback - all of which doesn’t bode well with the aforementioned mantra.

If, for example, the promise to the customer is to respond to a query “within 72 hours”, the bar really hasn’t been set very high (think of what else you could achieve in 72 hours!). Even if the response occurs after 36 hours, the customer will probably still be annoyed and not thrilled that you’ve “beaten” your conservative and painfully long-winded estimate.

An alternative approach to managing customer expectations relies on not just promising (and delivering) the high level and type of service customers expect, but also delighting them with the unexpected. This could be in the form of providing more relevant and personalised service (particularly if this really shows your customers that you understand and value them as individuals), or simply by introducing business processes that genuinely make your customers’ lives easier.

Either way, you’ll get closer to meeting (or exceeding) expectations while still being an attractive and relevant proposition to customers. Without this, it is difficult to build trust and even think about attaining any related customer relationship goals.

## Commit to 2019

Lastly (and on a more abstract note), if businesses are chasing customer loyalty, we also need to think about the type of commitment we’re expecting from our customers to achieve this goal.

When it comes to purchasing patterns and behaviours, discounts typically trump brand power, and switching for convenience is far more prevalent than sticking around because you’re “loyal” to any particular company or brand.

On a professional level, the days of working for the same employer for 15 years have long gone. On a personal level, social media has created an abundance of digital acquaintances who we broadcast our thoughts to regularly, yet these interactions often lack the significant interpersonal engagement required to develop meaningful, loyal and committed relationships.

Current trends also indicate that adults are getting married much later than previous generations (if at all). Courtship and the path to committing has become more protracted; not because people care about marriage less, but because they care about it more and want to get it right the first time.

So where does this leave us as businesses? We want loyal customers yet we expect a level of commitment that many customers find unfamiliar and are cautious of providing. Our digitally-enabled fast-paced lives have inadvertently prioritised immediate gratification over long term growth and development, yet when it comes to business, we still expect our customers to be in it for the long haul?

Loyalty may not be dead, but we need to think critically about whether the modern consumer has shifted the goal posts. Rather than setting marriage as a goal, we need to think about all the successful dates you need to go on before you get there. This is inherently why businesses simply need to do all that they can from a customer service and CX perspective to make every possible customer interaction a glorious one.



Wynand Smit is CEO of INOVO, a leading business services provider.

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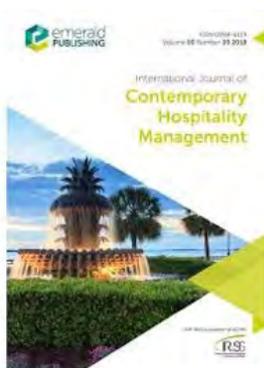
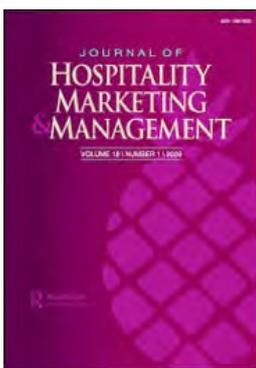


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## HITEC Minneapolis 2019 Preview



**Preview big ideas, brilliant minds and modern technology at HITEC Minneapolis 2019 - set to take place June 17-20, 2019 at the Minneapolis Convention Center in Minneapolis, Minnesota USA.**

HITEC will feature a world-class hospitality technology showcase, an extensive educational programme, expert keynote and general sessions, and celebrations of the revolutionary women and promising startups in hospitality technology today.

Full conference attendees gain access to more than 350 industry-leading solution providers for three days on the HITEC exhibit floor. Do not miss this opportunity to survey the world-class hospitality technology products and services from all over the world brought together in one immense space.

New this year from HFTP and the HFTP Foundation is the Women in Hospitality Technology luncheon honoring the trailblazing women in the industry. These distinguished professionals will share their stories and strategies for building a support network, the importance of mentoring, and the value of paying it forward.

HFTP's popular startup competition, Entrepreneur20X (E20X), makes its return to HITEC. The competition features ambitious, enterprising startups presenting the next "big idea" to a roomful of HITEC attendees and a panel of expert judges including hospitality CIOs, angel investors and serial entrepreneurs.

Beyond Tomorrow - The Human Revolution with award-winning global futurist Chris Riddell concludes the education programme

on the first day. His opening keynote presentation will uncover the ways humans adapt to high speed change and unlock insights for businesses and leaders in today's highly disrupted digital world.

Following Riddell's presentation, enjoy an evening of entertainment and networking with fellow HITEC attendees and hospitality professionals at the HITEC Opening Party presented by Samsung.

Capping off three incredible days of education is visionary thinker and design innovator John Picard with his closing general session on emerging technologies, the "internet of things" and connectivity, The Digital Transformation of Sustainability: A Conversation at the Edge of Now.

When your professional development is complete, spend some time getting to know HITEC's host city of Minneapolis. Also known as the "Mini Apple" and one half of the "Twin Cities," Minneapolis is a charming Midwestern U.S. metropolis bursting with culture and natural beauty.

Get the best possible price when you register for HITEC Minneapolis 2019 by May 10. Visit [www.hitec.org/minneapolis](http://www.hitec.org/minneapolis) to learn more and register today.

# Making sense of Artificial Intelligence in Hospitality



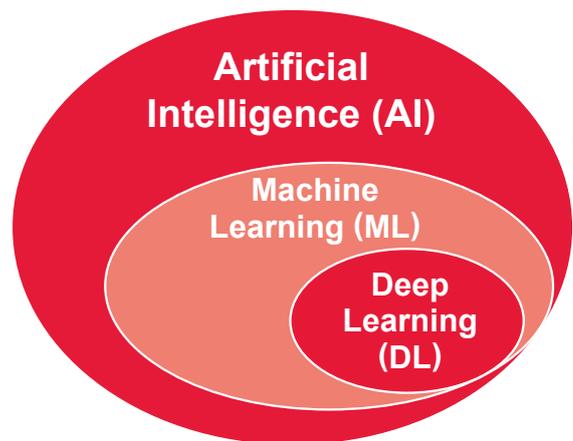
With only 32 teams participating in the 2018 FIFA World Cup, and an extensive amount of data available on players and past games, it should have been easy to predict the winner, right? Big companies, such as Goldman Sachs used Artificial Intelligence (AI) algorithms and predicted that Brazil would win<sup>1</sup>. A lot of other studies and simulations from renowned universities and research teams provided similar predictions, with most of them not even considering Croatia reaching the quarter finals.

The last few years have shown the strong potential of AI, transforming our lives in areas such as medicine and astronomy, but failing at examples like this seemingly simple World Cup case. This reminds us how important it is to consider relevant data, and that initial predictions should not be set in stone. To be accurate, predictions should be dynamic in order to reflect the complexity of “real life” and take into account the subtle changes that may impact the final result along the way.

Artificial Intelligence is a hot topic in many sectors and industries like revenue management, finance, automotive, and sports. There isn't a single dinner, event, or meeting where this topic isn't being discussed. But what exactly does AI mean?

Artificial Intelligence is the term we use for machines which mimic learning or reasoning - in other words, they can perform a task which would normally require human intelligence.

All the AI progress witnessed in recent years has been enabled by a specific subset of AI called Machine Learning (ML). As opposed to legacy AI algorithms where the intelligence; the approach and the parameters needed to solve a problem are built in the algorithm, ML algorithms acquire the needed intelligence to solve specific problems by learning from examples using problem-specific data. More recently, Deep Learning (DL) which is a subset of Machine Learning, has emerged, taking AI capabilities to another level. This new AI field was partly enabled by the progress made in the scientific and algorithmic fields, but mainly by the ability to use increased computing power to analyze and process larger volumes of available data. One of the most salient advances of these new algorithms compared to traditional ML algorithms consist in their capacity to self-define the best representation of the input data needed to reach the most accurate results, whereas standard Machine Learning algorithms require this task to be performed by humans. The flipside of Deep Learning is the tremendous amount of data required to reach satisfactory levels of accuracy, which even a hotel with 5,000 rooms would not fulfill.



The core proprietary algorithms used by Infor EzRMS are built around AI, and more specifically, Machine Learning. Numerous robust ML algorithms were selected by considering the particularities of Revenue Management and were then tested and enhanced in order to achieve the best results. The latest major changes that Infor introduced to the forecast algorithms are “backpropagation-based learning” and “improved dynamic trend modelling”. Infor EzRMS forecast models have always continuously learnt from new production observations but they now also learn from the accuracy of the produced predictions comparing the daily forecasted figures against the actual results. This Machine Learning approach allows Infor EzRMS to robustly and continuously learn and evolve based on minor forecast deviations as well as the accelerated detection of business trends, the end result being much improved adaptability and forecast accuracy.

Whilst we use and benefit from AI, AI is not a goal in itself. We also complement it with statistical and economical techniques, with our focus as a company being on how to continuously provide Infor customers with the best and most up to date science. We at Infor are also heavily active with research and have recently seen some encouraging progress with multiple Deep Learning approaches. Watch this space!

As it stands, the maturity of DL algorithms and their readiness to deal with limited volumes of hospitality data and make it statistically relevant is questionable. However, we are working on it and the next few months and years should certainly show remarkable progress across all technological areas.

Hopefully, you now have a little more insight on what AI is all about and can show off at your next meeting or dinner party!

<sup>1</sup>[www.goldmansachs.com/insights/pages/world-cup-2018/](http://www.goldmansachs.com/insights/pages/world-cup-2018/)

Marwen Nouri, Ph.D Infor EzRMS Senior RM Scientist

## Guests demand change



### **A move towards greater personalisation has seen growth in guests calling for ever more choice in booking, Katherine Doggrell reports**

A study by Foresight Factory, commissioned by Amadeus and IHG, has highlighted the key trends which will change the way we book and experience hotels, taken from the insights of over 7,500 consumers worldwide.

The number of international travellers is expected to almost double by 2036, and as this number grows, so too do the demands on the hospitality industry. This is a period of unprecedented change, where advances in cloud and analytical technology meet guests who both create and share more data, and place higher demands on their hospitality experience. The outcome? A new challenge is born. The industry must accommodate growth, but crucially it must also leverage

a unique opportunity to futureproof operations. Integrated technology across the hospitality ecosystem will underpin the solutions and innovative applications of tomorrow.

From the fundamental role of technology to new experiences, brand loyalty and unlocking booking capabilities - these are the core elements of hospitality that must adapt.

Central to each emerging trend are changing guest behaviours and needs. To understand the guest of the future, over 7,500 consumers across 12 markets were surveyed, with a number of industry experts also interviewed on the trends they see impacting the guest experience of tomorrow.

Each trend unpicked a different aspect of the hospitality industry that would be disrupted when operational advances begin capitalising on new guest expectations. Expect tech that augments the human hospitality service, loyalty programmes that are enriched with insights from guest data and booking processes that are built on what guests value rather than standard configurations.

“Hospitality was an early adopter of technology, dating back to Holiday Inn’s launch of Holidex in 1965. As one of the first central reservation systems, it vastly improved many of the manual processes that existed to deliver experiences, and it connected airline and travel agent systems for the first time. However, industry technology has not kept pace with changing consumer behaviours and market demands, and now today’s technology is holding us back from the next chapter of guest services. Tech infrastructure systems need to evolve in order to meet the needs of tomorrow’s consumer, with an ultimate goal of allowing guests to share trip-specific information and express preferences and needs. Amenities, including room types and “bookable” attributes will further evolve, creating more opportunities for experience customisation than ever before, all brought to life by hospitality providers whose teams are empowered by technology at their fingertips. These changes will collide to create the future of guest loyalty, which won’t be driven by points and carbon-copy amenities, but by genuine connection, ease of experience, and guests feeling overall cared for, valued, and heard,” said Chris K Anderson, Director Center for Hospitality Research, Cornell University.

The report also includes analysis from Cornell’s Center of Hospitality Research and identified the three themes that will impact the hospitality sector:

**Beginning of the End for Room Types:** The report predicted that within the next five years or so the way hotel rooms were be offered to guests would change and traditional room types would no longer be the core product offered by hotels. Attribute-based bookings would allow guests to be able to pick and choose the individual features of their hotel rooms - from replacing the desk with a yoga mat, to booking a room when they need it, i.e. from 9am to 9pm instead of overnight. This degree of personalisation of inventory and services will open up new revenue streams for hotel owners as well as providing better and more tailored services to meet guest needs. Fundamental attribute auditing as well as the introduction of AI to ensure intelligent and simplified offerings for guests would underpin this transition.

Just under two thirds of global travellers (61%) would prefer hotels to be priced in a way that allows them to add additional options. The appetite for customisation changes by region though: 56% of consumers in Europe, 67% in the Americas and as many as 75% in Asia say that they have or are interested in customising a room to suit their needs.

Only a quarter of consumers (24%) currently say they have had the chance to stay in a room which is personalised to their needs.

**Rise of Tech-Augmented Hospitality:** The service model of the future will be delivered by a sensitive collaboration between humans and technology - some basic administrative services will be automated although consumers say clearly that human interaction remains important. Technology will be used by the concierge and front of house staff to deliver better service at scale and to enhance relationships with guests. However, it will be important that hotels know their guests well enough to judge the right balance between automated solutions and human interaction - deciding when not to automate will be just as important as deciding when to do so.

The appetite for automation varies by region with 53% of guests from Asia preferring to paying a bill via self-service compared to 40% of guests from the Americas and only 26% of Europeans.

Two thirds of guests (67%) still prefer to talk to staff for emotional or personal interactions like seeking a recommendation or making a complaint.

76% of guests would value earphones that would “immediately translate what someone speaking to me in a different language was saying.”

**Achieving Cult Status at Scale:** Unlocking guest loyalty for the hospitality sector will rely less on price /points systems and more on developing individual relationships with guests in the future. Technology will enable hospitality providers, large and small, to generate a loyal, tribal fan base and create emotional connections between guests and their brand. To do this, hotels must understand their guest’s individual needs and motivations for their trips, and offer services, surprises and unique experiences based on this.

Just under three quarters (73%) of consumers say the most important thing to them when travelling is having a unique experience and two thirds (59%) of global travellers say that they would like to plan more in advance of a holiday but find it hard to know what is good to do locally.

Around half of consumers (47%) would be likely to share their data for exclusive discounts, and 30% for personalised trip advice.

Joe Youssef, EVP Corporate Development & Marketing Hospitality, Amadeus, said: “The key to unbundling and offering hotels a way to achieve it is not to overcomplicate the options for the guest. The context of their travel is important, with it’s leisure or business. If I cannot understand their preferences then I cannot offer what they want.

“We want hoteliers to be able to compete on something more meaningful than just location and price, you want to be able to customise the room according to the guests’ requirements. One of the key strategic goals for the hotelier is to support guest engagement and revenue opportunities. They want to be able to pursue personal marketing opportunities.”

Clodagh Brennan, Senior Trends Analyst, Foresight Factory, added: “When people are travelling for leisure, loyalty schemes are not as high a priority, which means there is a need to build loyalty through experiences and connecting with the customer. Data can add a new level of connection, so, for example, you might know that their flight has been delayed and then you can intercept the experience.

“You could also use social media to have an idea of why they are on holiday and what they might like to do, so that you don’t offer them something that they have no interest in. To achieve this at scale it is necessary to have analytics and create these insights, so that you can have these emotional connections at scale.

Youssef added: “If you look at the challenges of the industry, information has been key and it is crucial to understand the guests’ preferences to create a point of difference.”

Just under three quarters of those surveyed said the most important thing to them when travelling was having a unique experience and two thirds said that they would like to plan more in advance of a holiday but find it hard to know what is good to do locally. Around half of consumers would be likely to share their data for exclusive discounts, and 30% for personalised trip advice.

The Infor logo consists of the word "infor" in a white, lowercase, sans-serif font, set against a solid red square background.

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## Better March weather boosts trading



**Britain's managed pub and restaurant groups saw collective like-for-like sales grow 3.8% in March compared to the same month last year, when trading was hit badly by the effects of the 'Beast from the East', latest figures from the Coffer Peach Business Tracker show.**

"March last year was a month to forget when snow brought much of the country to a standstill. Both pubs and restaurants felt the effects with like-for-likes across the board down 3.1%, so these latest figures will be a relief as the sector regains lost ground," said Karl Chessell, director of CGA, the business insight consultancy that produces the Tracker, in partnership with Coffer Group and RSM.

London, which was hit worse than the rest of the country last March, saw like-for-likes up 5.5% this March, with the rest of the country enjoying a 3.3% increase.

Managed pubs were collectively up 4.0%, with restaurant groups, which have suffered most in recent months, up 3.6%.

Pubs also saw a recovery in both food and drink sales over the month, although drinks trade grew 5.7% against a smaller 2.7% increase in food, suggesting that the underlying trend for drink sales to outstrip food sales is continuing," added Chessell.

"The big test, of course, will come with the results for April and the Easter holidays. Last Easter was a bumper time for the sector with sales ahead 5.9% on the holiday weekend the year before, boosted by the fact that many people didn't go out in March. The pressure to match that this time is now on," he added.

"These results show that revenue levels across the sector returned to March 2017 levels last month. The market remains challenging for many casual dining operators who continue

to face unprecedented levels of competition. The wide variety of choice including the popularity of food halls, markets and pop-up street food offers around the country continues to draw custom away from conventional restaurant and pub outlets and are increasingly the social meeting place of choice for younger consumers," said Trevor Watson, Executive Director, Valuations, at Davis Coffer Lyons.

Saxon Moseley, Senior Manager at RSM, said: "With flowers blooming and the onset of British summertime, managed pub and restaurant groups bounced back this March with strong like for like performance unhindered by the poor weather conditions of last year's 'Beast from the East'. With the later Easter break in 2019 and the possibility of progress on Brexit, there is cautious optimism that April will see a loosening of consumer purse strings and further good news for the sector."

Total sales across the 52 companies in the Tracker, which include the effect of net new openings since this time last year, were ahead 6.1% compared to last March.

"The latest figures have essentially got the market back on an even keel, as underlying like-for-like growth for the Tracker cohort, which represents both large and small groups, reached its highest level since July 2017, running at 1.5% for the 12 months to the end of March, a marked improvement on the 0.9% at the end of February," said Chessell.

## Fish float to the top



**Quota cuts for cod and haddock saw Fish rise significantly year on year in February. Meat experienced deflation following a drop in seasonal demand coupled with ample pork supplies. Although sitting above this time last year, Dairy appeared to be softening in light of good quality forage following good weather. Sugar production forecasts suggest a reduced yield for the coming year, strengthening prices as a result.**

Fish has seen the most significant year on year inflation of all categories, at 30.2%. Reductions to quotas of cod and haddock have been the most significant impactor, with cuts for the Barents Sea for this year first announced last October. On a month on month basis, Fish has moved down on the Index, putting inflation back in line with July 2018, and whilst buyers might hope for inflation to ease as the year on year impact is washed out, there may be further cuts later in the year. Good supply of salmon has resulted in a price drop, aiding the deflationary monthly movements seen in this category. Forecasts for salmon suggest an increase to production for the coming year, which should lead to further softening of prices over coming months.

Having climbed since last summer, Dairy prices now appear to be easing month on month, whilst still sitting high above this time last year. UK farm-gate prices for milk dropped in January, as milk volumes rose by 1.7% on this time last year. Healthy grass growth has contributed positively to pricing this month, reducing the reliance on expensive feed, contributing to the monthly fall in Dairy. Looking to the future, forecasts by AHDB suggest that global demand will surpass increases to production, and will cause price rises for milk as a result.

Over-production of sugar in India has been the main story regarding this category and is the cause of further year on year deflation in the Index. Monthly movements show Sugar is up, bolstered by firming of cocoa and sugar commodity pricing. The long run of falling sugar prices may now be coming to an end as 2019/20 yield forecasts are reduced when compared to the past year. High stocks in India, however, may be used to fill any supply deficit, limiting price rises.

Both month on month and year on year deflation has occurred in Meat as a result of waning seasonal demand and increased availability of pork. Forecasts for reduced production in the UK and Ireland will see prices firm later this year. The prospect of a no-deal Brexit brings uncertainty for the future of producers, who may need to find alternative sources of revenue if WTO tariffs are imposed on trade with Europe.

A decrease in crude oil price since October has led to reduced production and transportation costs, while recent strengthening of the Pound, following the rejection of the proposed Brexit deal, has also had a limiting effect upon price rises this month.

## Top-line growth fails to deliver profit

The UK hotel industry is off to a rough 2019. At least on the profitability spectrum. A slight increase in RevPAR in February was not enough to push hotels into the black, as the UK suffered a second consecutive month of profit decline, according to the latest data tracking full-service hotels from HotStats.

GOPPAR for the month settled in at £35.44, a 4.4% year-over-year decline. This continued the downward trend in this measure since the start of 2019.

Despite the 0.5% increase in RevPAR, non-rooms revenues dropped by 0.4% in the month to 36.2% of total revenue. The drop in ancillary revenues included declines in Food & Beverage (down 0.7%), Conference & Banqueting (down 1.3%) and Leisure (down 0.5%), on a per-available-room basis.

Still, hotels managed to eke out a small 0.2% gain in YOY TRevPAR, which has now increased in each of the past five months.

But the increase was wiped out by rising costs, which included a 0.5-percentage-point increase in payroll as a percentage of total revenue to 32.8%.

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

#### February 2019 v. February 2018

RevPAR: +0.5% to £78.80

TRevPAR: +0.2% to £123.42

Payroll: +0.5 pts. to 32.8%

GOPPAR: -4.4% to £35.44

The most major increase in overheads was in utility costs, which increased by 8.7% YOY to £5.98 per available room, equivalent to 4.8% of total revenue. This was closely followed by an 8.2% YOY increase in Sales & Marketing expenses.

As a result of the movement in revenue and costs, profit contribution at hotels in the UK was recorded at 28.7% of total revenue, which is well below the average in the rolling 12 months to February 2019, at 38.2%.

"While top-line numbers have actually been positive - albeit slightly - rising costs are having an adverse impact on flow through," said Michael Grove, Director of Intelligence and Customer Solutions, EMEA, at HotStats.

In contrast to the performance of the total UK hotel market, February was a positive month for properties in Cardiff, as they scored an 8.9% YOY increase in profit per room. A key demand generator was Wales hosting England in the 2019 Six Nations Rugby tournament.

The growth in profit was led by an 8.7% increase in achieved

average room rate to £84.37, as hoteliers in the Welsh capital gambled on driving rate at the expense of room occupancy, which fell by 3.3 percentage points in the month.

TRevPAR increased by 6.0% YOY, with beverage revenue comprising 9.3% of revenue. This is broadly in line with TRevPAR recorded in the rolling 12 months to February 2019, at £101.

The positive mood was helped further by a 1.5-percentage-point decrease in payroll as a percentage of total revenue.

### Profit & Loss Key Performance Indicators - Cardiff (in GBP)

#### February 2019 v. February 2018

RevPAR: +4.2% to £64.21

TRevPAR: +6.0% to £100.18

Payroll: -1.5 pts. to 30.8%

GOPPAR: +8.9% to £27.29

Edinburgh was a different story. Despite Murrayfield Stadium hosting Six Nations rugby matches between Scotland and Italy and Scotland and Ireland, YOY GOPPAR in the Scottish capital dropped by 27.7% in the month, representing a third consecutive month of profit decline in the city.

RevPAR fell by 10.3% YOY, with ARR declining 9.2% YOY.

Further declines in non-rooms revenues contributed to the 6.6% decrease in TRevPAR to £102.57.

Revenue declines were further exacerbated by ballooning costs, which included a 2.1% increase in labour costs on a per-available-room basis, leading to a 3.2-percentage-point increase in payroll as a percentage of total revenue to 38.0%. Furthermore, YOY utility costs were up 21.2%, on a per-available-room basis.

### Profit & Loss Key Performance Indicators - Edinburgh (in GBP)

#### February 2019 v. February 2018

RevPAR: -10.3% to £67.16

TRevPAR: -6.6% to £102.57

Payroll: +3.2 pts. to 38.0%

GOPPAR: -27.7% to £19.33



## Members' Events

**Tuesday 14th May 2019**

### ***Sustainability and managing your energy - TOP TIPS***

**Location:**

Jumeirah Carlton Tower  
Cadogan Place, London SW1X 9PY

**Time:** 6pm - 8pm

Speakers from the Considerate and the Government Department for Business, Energy and Industrial Strategy (BEIS), The GLA and The Carbon Trust will discuss energy management and share tricks for smarter practices within hospitality.

Find out how you can save money whilst helping the environment. Register by emailing [hospa@hospa.org](mailto:hospa@hospa.org)

**Wednesday 22nd May 2019**

### ***The Hotel Operations Conference 2019***

**Location:**

The Montcalm Hotel, 2, Wallenberg Place, London, W1H 7TN

**HOC 2019**

**topics will include...**

- Pricing hotel operations
- Operators looking beyond the (white) label
- Why leading global majors still want to be in the management game
- The role of management from the chains point of view
- The human element - HR, wage costs and staffing
- Franchise management agreements - are they fit for purpose
- Delivering a service
- Maximising non room returns
- Mitigating risk: IT, data and GDPR
- Balancing the interests of owner and operator
- Controlling costs
- There is an app for that

For more information, please visit:  
[www.hoteloperationsconference.com](http://www.hoteloperationsconference.com)

**Monday 10th June 2019**

### ***Keeping your guest data secure***

**Location:**

Jumeirah Carlton Tower  
Cadogan Place, London SW1X 9PY

**Time:** 6pm

Cyber Security, GDPR, PCI DSS, Strong Authentication - keeping your data safe and secure is no easy task. Are you working towards ISO 27000 compliance?

Is your data protection officer up to date? Who is responsible for the fine if you have a breach?

Find out what you could be doing and leave with useful tips and some quick-wins to keep you on the right path.

**Thursday 13th June 2019**

### ***Finance Update***

**Location:**

BDO  
55 Baker Street, London, W1U 7EU

**Time:** 6pm

Join the HOSPA finance community for a breakfast seminar with BDO at their offices - 55 Baker Street on the 13th June.

BDO will update you on current topical accounting issues under UK GAAP and IFRS. As well as covering the latest developments in tax including corporate taxes, VAT and recent employment tax issues.

**Topics:**

- Brexit
- Financial Reporting
- VAT
- Tips & Troncs
- Corporate Criminal Offences

**Wednesday 26th June 2019**

### ***Scottish Members Event***

A hospitality event for HOSPA members in Scotland to include an update presentation followed by networking drinks.

Full details of venue, timings etc. will be available shortly on the HOSPA website.

**Thursday 4th July 2019**

### ***The National Hotel Marketing Conference***

**Location:**

The Hilton at St Georges, Burton on Trent

Make your way to this fantastic national centre on Thursday 4th July and get the injection of "marketing adrenalin" that you, your colleagues and your business need, to market your hotel successfully through 2020 and beyond.

This is your chance to mix with 200 marketing and sales managers, General Managers and hotel owners, to learn how your marketing can improve, update yourself on the very latest techniques in digital marketing, and see how your business can thrive in such a competitive marketplace!

HOSPA members are able to secure a £50 reduction on the standard conference rate - from £245 + vat down to £195 + vat.

For more information, an exhibitor/sponsor pack, or just to register for advance information on the programme, please email [conference@thetourismbusiness.com](mailto:conference@thetourismbusiness.com) or call 0770 291 2938.

**Please visit [www.HOSPA.org](http://www.HOSPA.org) for all registration details and all other events.**

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**For Further Information please contact  
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