Hospitality in Wales:
driving local economies and underpinning communities

A Report by the British Hospitality Association

OCTOBER 2011

BRITISH HOSPITALITY Association

Contents

The British Hospitality Association, incorporating The Restaurant Association, is the national trade association for the hotel, restaurant and catering industry. It has in membership almost every publicly quoted hotel group, many independent hotels, restaurants and clubs, major food and service management companies, motorway service operators and many local hospitality associations, as well as hospitality education establishments. In total, it represents more than 40,000 establishments with over 500,000 employees across the UK.

The association promotes the interests of the entire hospitality industry to government ministers, MPs and MEPs, members of the Scottish Parliament and Welsh Assembly, the EU Commission, the City and the media.

Printed copies of this report can be ordered by contacting:
policy@bha.org.uk

Alternatively, the report can be downloaded in PDF format from **www.bha.org.uk**

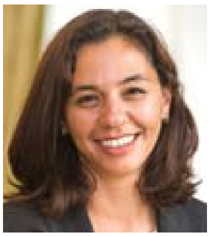
Published by:
British Hospitality Association
Queen's House
55/56 Lincoln's Inn Fields
London WC2A 3BH

Tel: 020 7404 7744
Fax: 020 7404 7799
E-mail: bha@bha.org.uk
www.bha.org.uk

BHA would like to thank its key sponsors

The hospitality industry plays a critically important and central role in the economic and social life of local communities in every part of Wales. This report demonstrates just how important hotels, guest houses, restaurants and cafes, pubs and clubs, self catering and attractions are to our country.

Andrew Evans
Chairman
BHA Wales



Ufi Ibrahim
Chief Executive
BHA

In a study, commissioned by the British Hospitality Association (BHA) and undertaken by Oxford Economics as a follow-up to its earlier report on the economic contribution of the industry to the national economy (which the BHA published in October 2010), we identify each local authority in Wales and the contribution made to it by the hospitality industry in terms of employment and Gross Value Added – that is, net wealth creation.

The resulting picture is clear: hospitality is a key contributor to every local authority's economic livelihood and particularly to its job-creating and wealth-creating potential.

Fully appreciating the total impact of hospitality on local jobs, wealth, culture and heritage is the first step to unlocking the industry's rich potential for regeneration and rebalancing growth. We intend to play a full part wherever we can to boost jobs, support communities and grow the economy. The BHA in Wales is committed to working with hospitality businesses, local communities, the National Assembly for Wales and local government to bring about full recognition of the value of the industry to the economy and realise all the opportunities to advance the agenda for growth.

As the report shows, investment in the hotel industry in the last decade across the UK has reached £25bn with the construction of over 1,100 new hotels (52 hotels including 29 budget hotels, representing 3,800 rooms in Wales), much refurbishment of existing properties and the opening of many new restaurants and attractions. More investment is planned for the future.

But this continued investment needs to be matched by the support that hospitality businesses receive from government. If such an additional and dynamic support framework is introduced and implemented, we believe hospitality businesses can create up to 10,000 new jobs in Wales by 2015 and more than double that to over 20,000 by 2020. These are local, reliable, dependable jobs for local people, spread throughout cities, towns and villages in Wales, in every part of our magnificent coastlines and countryside, in every constituency and in every local authority area.

This contribution to employment in Wales is part of a UK-wide initiative in which BHA believes that the hospitality industry can create 236,000 new jobs by 2015 throughout the UK and a further 239,000 jobs by 2020.

That's why, in any national and local economic strategy, hospitality should be seen as an essential part of an area's economic structure and its policy-making. This is the challenge which is facing Wales. It is a challenge that needs a strong partnership between the hospitality sector in Wales, every local authority, and, of course, the National Assembly for Wales and the Welsh Government.

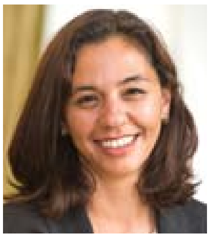
We'll play our part: the BHA in Wales is committed to making this partnership a success and is ready to deliver for Wales.

Rhagair

Lletygarwch yng Nghymru: Sbarduno Economïau Lleol a Chynnal Cymunedau

Mae'r diwydiant lletygarwch yn chwarae rhan hollbwysig a chanolog ym mywyd economaidd a chymdeithasol cymunedau lleol ym mhob rhan o Gymru. Mae'r adroddiad hwn yn dangos pa mor bwysig i'n gwlad yw gwestai, tai llety, tai bwyta a chaffis, tafarnau a chlybiau, lleoedd hunan arlwyo ac atyniadau.

Andrew Evans
Cadeirydd
BHA Cymru



Ufi Ibrahim
Prif Weithredwr
BHA

Mae'r adroddiad yn cyd-fynd ag astudiaeth a gomisiynwyd gan Gymdeithas Lletygarwch Prydain (BHA) ac a wnaed gan Oxford Economics ac mae'n ddilyniant i adroddiad cynharach ganddo am gyfraniad economaidd y diwydiant i'r economi cenedlaethol (a gyhoeddwyd gan BHA ym mis Hydref 2010). Rydym yn nodi pob awdurdod lleol yng Nghymru a'r cyfraniad sy'n cael ei wneud iddo gan y diwydiant lletygarwch o ran cyflogaeth a chreu cyfoeth newydd net.

Mae'r darlun sy'n deillio o hyn yn glir: mae lletygarwch yn gyfrannwr allweddol i gynhaliaeth economaidd pob awdurdod lleol ac yn enwedig i'w botensial o ran creu swyddi a chyfoeth.

Gwerthfawrogiad llawn o holl effaith lletygarwch ar swyddi, cyfoeth, diwylliant ac etifeddiaeth leol yw'r cam cyntaf tuag at ddatgloi potensial cyfoethog y diwydiant ar gyfer adfywio ac ailgymhwyso twf. Bwriadwn chwarae rhan lawn pryd bynnag y bo modd er mwyn hybu swyddi, cynnal cymunedau a datblygu'r economi. Mae BHA Cymru wedi ymrwymo i gydweithio â busnesau lletygarwch, cymunedau lleol, Cynulliad Cenedlaethol Cymru a llywodraeth leol er mwyn cydnabod yn llawn werth ein diwydiant i'r economi a manteisio ar bob cyfle i hybu'r agenda ar gyfer twf.

Fel y mae'r adroddiad yn dangos, yn ystod y degawd diwethaf mae'r buddsoddiad yn y diwydiant gwestai ar draws y DG wedi cyrraedd £25bn. Codwyd dros 1,100 o westai newydd (52 o'r rhain yng Nghymru, gan gynnwys 29 o westai pris rhesymol, yn darparu 3,800 o ystafelloedd), adnewyddwyd llawer o'r eiddo sy'n bodoli ac agorwyd llawer o dai bwyta ac atyniadau newydd. Bwriedir buddsoddi llawer mwy yn y dyfodol.

Ond i gyd-fynd â'r buddsoddiad parhaus hwn rhaid i fusnesau lletygarwch gael cymorth teilwng gan lywodraeth. Os bydd fframwaith ychwanegol a dynamig o'r fath yn cael ei gyflwyno a'i roi ar waith, credwn y gall busnesau lletygarwch greu hyd at 10,000 o swyddi newydd yng Nghymru erbyn 2015 a mwy na dwbl hynny i dros 20,000 erbyn 2020. Mae'r rhain yn swyddi lleol a dibynadwy i bobl leol, mewn dinasoedd, trefi a phentrefi yng Nghymru, ym mhob rhan o'n harfordir a chefn gwlad ysblennydd, ym mhob etholaeth ac ym mhob ardal awdurdod lleol.

Mae'r cyfraniad hwn i greu gwaith yng Nghymru yn rhan o fenter ar draws y DG a allai, ym marn BHA, fod yn fodd i'r diwydiant lletygarwch greu 236,000 o swyddi newydd erbyn 2015 ledled y DG a 239,000 o swyddi ychwanegol erbyn 2020.

Dyna pam, mewn unrhyw strategaeth economaidd genedlaethol a lleol, dylid ystyried lletygarwch yn rhan hollbwysig o strwythur economaidd ardal ac o'r broses o lunio polisi. Dyna'r her sy'n wynebu Cymru. Mae'n her sydd ag angen partneriaeth gref rhwng y sector lletygarwch yng Nghymru, pob awdurdod lleol, ac, wrth gwrs, Cynulliad Cenedlaethol Cymru a Llywodraeth Cymru.

Byddwn ni'n chwarae ein rhan: mae BHA Cymru wedi ymrwymo i wneud y bartneriaeth hon yn llwyddiant ac mae'n barod i gyflawni dros Gymru.

Executive summary

- The hospitality industry is one of the main pillars of the Welsh economy and the economic driver of almost every part of the country.

- Hospitality directly employs over 112,000 people in Wales and, indirectly, a further 56,000 – 8.3 per cent of Wales' jobs. It accounts for £2.9bn in turnover and contributes £1.4bn to the Welsh economy in wages and profits (Gross Value Added – GVA).

- Hospitality can create a further 22,040 direct jobs by 2020 providing the right supportive framework is created. Those local authorities in Wales with the highest levels of direct hospitality employment are projected to create the largest number of net additional hospitality jobs.

- Hospitality's wealth-generating and job-creation potential is spread throughout Wales with towns, cities and especially rural areas benefiting from its activities. It also plays a significant role in the social and cultural life of every community.

- In terms of direct hospitality employment, the largest local authority areas are Cardiff and Swansea, followed by Gwynedd; employment in rural areas is more spread-out. But as a percentage of total employment, Gwynedd (19.9 per cent), Conwy (19.2 per cent), Pembrokeshire (15.2 per cent) and Anglesey (14.4 per cent) are the authority areas most dependent on hospitality in terms of employment. In only one area (Merthyr Tydfil) does this number fall below nine per cent (Table 6).

- Gwynedd (19.5 per cent) and Conwy (18.4 per cent) are the areas that contribute the greatest Gross Value Added to local economies but hospitality is a major contributor to wages and profits in all areas (Table 3). Hospitality GVA is over 10 per cent in nine Welsh local authority areas.

- Over 50 new hotels, at all price levels, have opened in Wales since 2000 and more are planned to open in the next few years. With the refurbishment of existing properties, this represents an investment of some £1bn. The Tourism Investment Support Scheme (TISS) must be extended to encourage hospitality businesses to reinvest. Future investment is endangered, however, because of the reluctance of banks to fund new hotel projects, extensions and refurbishments.

- Local authorities must introduce and implement policies that create a sustainable environment within which hospitality businesses can grow and develop as part of the local plan.

- BHA Wales warmly welcomes the announcement by the Minister for Business, Enterprise, Technology and Science of the addition of tourism and hospitality as a priority sector in Wales – deserved recognition that the industry is able to create jobs at all skill levels as effectively, if not more effectively, than other sectors.

- Funding for VisitWales for the marketing of the industry must continue and should be regarded as a necessary investment, central to the success of Welsh tourism, the Welsh hospitality industry and the Welsh economy. The ongoing promotion of tourism areas is as important to their growth as attracting capital investment.

- The UK's high rate of VAT on accommodation and attractions makes Wales uncompetitive with the rest of Europe. All but two other member states of the EU have a reduced rate for accommodation and many also have a reduced rate for attractions and restaurants meals.

- Other barriers to growth include the difficulties and cost of obtaining a visa for visitors from potentially large source countries such as China and India, as well as the rising cost of Air Passenger Duty. A significant lack of broadband accessibility both cabled and mobile, especially in rural areas, is another significant barrier.

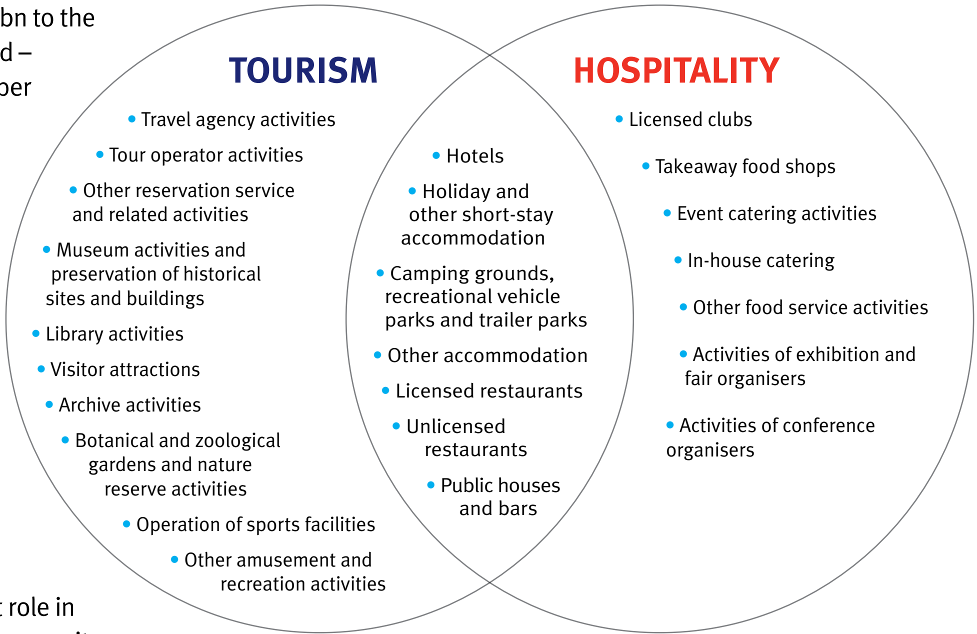
1 What is the hospitality industry?

Hospitality is one of the main pillars of the Welsh economy and an economic driver in almost every part of the country. It claims a positive, above-average share of the UK tourism and hospitality industry per head of population which testifies to the attractiveness of the country as a destination of choice and to the work of government at all levels, and the industry, to attract visitors.

In the UK, hospitality is the fifth largest industry, directly employing over 2.4m people and, indirectly, a further 1.2m. Oxford Economics estimates that the industry in Wales directly employs 112,000 people and a further 56,000 indirectly. It is thus one of the largest industries in Wales with over 7,000 hospitality businesses providing 8.3 per cent of jobs (higher than the UK figure of eight per cent) and accounting for almost £1.4bn to the Welsh economy in Gross Value Added – GVA (wages and profit), which is 3.1 per cent of all GVA in Wales. The hospitality industry drives other sectors of the economy.

A key strength of the industry to the principality is that its wealth and job creation potential is spread throughout the country with towns, cities and rural areas all benefiting from the activities of hotels, restaurants, pubs, other catering businesses and events. Not only is hospitality critical to the success of local economies, it also plays a significant role in the social and cultural life of every community.

By any measure, however, hospitality is an active engine of travel and tourism to and within Wales. Without a dynamic hospitality economy, the country cannot enjoy a thriving tourism industry.



THE HOSPITALITY ECONOMY INCLUDES:

Hotels and related services Including camping grounds and other accommodation.

Restaurants and related services including pubs, takeaway food shops, licensed clubs, and motorway service areas where hospitality services are the main activity for the latter.

Catering including contract catering to both private and public sector clients, and in-house catering across non-hospitality sectors, such as healthcare and education.

Event management including conference and exhibition organisation.

And temporary agency employment across these sub-sectors.

BHA Wales' agenda for growth 2

BHA Wales, with its members, has set the agenda that is summarised below and detailed in the remainder of this report. It addresses actions that will enable the hospitality industry to create wealth, prosperity and, most importantly, jobs in every local authority area in Wales. To help it achieve these aims, some significant barriers have been identified. These inhibit the industry's growth, discourage demand, and hold back job creation just at a time when jobs are most needed in every area.

BHA Wales will work:

1. To maximise tourism and hospitality's new role as a priority sector within the Department of Business, Enterprise, Technology and Science and, with government, seek to stimulate the industry's sustainable economic regeneration and growth.

Key sector status must enable the industry to work more directly and effectively with the Assembly's business team. Within hospitality, we are able to create jobs – at all skill levels, in all communities – as effectively, if not more so, than other primary sectors of the economy. The welcome benefits of the Tourism Investment Support Scheme (TISS) in Wales are valuable and must be protected – and extended – to enable hospitality to reinvest and, in turn, to provide more jobs and returns into the local community. BHA would also like to see more investment in the hotel industry encouraged, despite the removal of the Hotel Buildings Allowance.

2. To ensure that the existing marketing investment in tourism is maintained and, if possible, extended.

When money is tight, people cut back on the number of holidays they take and reduce their spend while on holiday. The Welsh Assembly Government's investment in marketing Wales as a tourism destination plays a massive role in maintaining the flow of visitors to Wales, and their spending power. It is essential that the political process understands that this marketing money is an investment and not a handout. An investment in tourism today will enable the government to have more to spend on vital services such as hospitals and schools tomorrow. Marketing support keeps the industry competitive with its near neighbours and is a catalyst for future PAYE, VAT, NI, Corporation Tax and Business Rate contributions that surpass many times the sums of the initial investment.

3. To encourage Welsh local authorities to recognise more fully their responsibility positively to promote economic growth within their area and to regard the hospitality industry as a key pillar of their local economy.

We want local authorities to introduce and implement policies that create a sustainable environment within which hospitality businesses can grow and develop as an integral part of the local plan. We thus seek positive partnership actions for Wales' hospitality industry and urge the 22 councils to work closer together in achieving this aim.

>>>

4. To help businesses reduce costs wherever possible and to become more competitive.

Costs are escalating rapidly in every area of the industry. Energy prices are soaring, the taxation burden has increased and business rates have increased to punitive levels for many operators.

5. To assist the Welsh Government to make tourism fit more closely into sectors of the wider economy, such as energy, food/ agriculture and banking/financial services.

There are clearly opportunities for greater co-operation and integration. We are willing to help.

6. To recruit support within Wales for the BHA's campaign to make the rate of VAT on hotel accommodation and attractions in the UK competitive with the rate of other EU member states.

The UK cannot realistically compete with other countries in Europe when there is such a disparity in the respective VAT rates for hotel accommodation, attractions (and for meals eaten out-of-home).

France's rate of VAT is 5.5 per cent for accommodation, Germany's is seven per cent and Italy's rate is 10 per cent. Twelve countries have also introduced a reduced rate for restaurant meals and eighteen have reduced rates for entry to attractions. Deloitte, in an independent report commissioned by Bourne Leisure and Merlin Entertainments, calculates that reducing VAT on accommodation and attractions to five per cent would yield a net benefit to the HM Treasury.

7. To support BHA's efforts to simplify and make more effective visa procedures to facilitate ease of access for bona fide visitors to the UK.

Visa control procedures, while remaining important, should be applied with more understanding of the needs of applicants so that they are easier to obtain and complete.

8. To control the high – and rising – rate of Air Passenger Duty.

This raises costs for visitors to and from Wales and inhibits visitor numbers.

9. To minimise the regulatory burdens on the industry.

Implementing the rising tide of rules and regulations costs businesses time and money; this burden needs to be eased.

10. To encourage the Welsh Government to widen national skills support.

BHA Wales believes there is a real opportunity to make our skills initiative truly relevant and tailored to Wales. This should be demand-led and should meet the industry's needs and aspirations while also delivering a holistic and vibrant solution to equip our people of all ages with the transferable skills they need so that they can provide a richness of life, individual work fulfilment and, most importantly, supply local jobs for local people.

As a partner of local government, the BHA is committed to supporting the effort to create additional jobs:

- We will emphasise to Ministers, Assembly Members, MPs, officials and other opinion formers the vital role that the hospitality and tourism industry plays in the economic and social life of every local authority in the country, with the aim of bringing about a complete understanding of the importance of the industry to the national economy.
- Through the active participation of BHA members, we will positively influence the approach of local authorities towards the hospitality industry in their area and we will continue to emphasise the role they play in meeting the objective of creating 9,980 new hospitality jobs by 2015.
- We will continue to contribute leadership and expertise to local tourism initiatives and to shape future structures.
- We will share members' experiences with others to enable best practice in matters relating to local tourism issues to be adopted more widely throughout the country.
- We will encourage local authorities to continue funding catering college courses.
- We will work with government at all levels to develop targeted hospitality blueprints to create jobs, improve the visitor experience and encourage sustainable development and growth.

4 Hospitality and local economies

In March 2011, as a follow-up to *Creating Jobs in Britain: A Hospitality Economy Proposition*, the BHA commissioned a special study by Oxford Economics to assess the economic contribution of the industry at local authority level. This contribution was measured in terms of:

1. **Direct employment in the hospitality industry.**
2. **Employment including direct and indirect (those jobs supported indirectly in the supply chain).**
3. **Gross Value Added (GVA) of the hospitality industry.**

What IS GVA?

Gross Value Added is the sum of wages and profits in hospitality and is used here because it measures the net contribution of the sector to the economy since it is the difference between the goods and services offered by the sector less the value of inputs used to produce them. The turnover of the sector in each local authority is approximately 2-2.25 times GVA.

> ***'TOURISM TOUCHES ALL PARTS OF WALES AND IS VERY IMPORTANT TO SOME OF OUR REGIONAL ECONOMIES. BY MAKING IT A PRIORITY SECTOR WE CAN STRENGTHEN THE DISTINCTIVE NATIONAL IDENTITY WALES HAS IN THE UK AND INTERNATIONALLY AS A PLACE TO VISIT, INVEST IN AND AS A PLACE TO DO BUSINESS.'***
>
> Edwina Hart, Minister for Business Enterprise, Technology and Science

BHA Wales is aware that both the British and the Welsh governments have introduced valuable measures to support hospitality and tourism businesses in recent years. In statements and actions they have increasingly recognised the economic importance of the industry. Wales' First Minister, Carwyn Jones, emphasised his awareness of the economic value of tourism to Wales when, in the summer of 2011, he explained his decision to move tourism from the Wales Cabinet's Heritage Department to the Department responsible for Business and Economy.

In doing so, he said: "I regard tourism as an industry: it is one of our biggest industries. In my view, it sits more properly with business, enterprise, technology and science than with the heritage department, in recognition of the fact that it is one of the biggest industries that we have, if not the biggest industry, and that it is a significant employer in Wales."

The Welsh Government's Business Minister, Edwina Hart, in announcing that tourism and hospitality would be designated a priority sector, acknowledged: "Tourism touches all parts of Wales and is very important to some of our regional economies. By making it a priority sector we can strengthen the distinctive national identity Wales has in the UK and internationally as a place to visit, invest in and as a place to do business."

The Prime Minister, David Cameron, made it clear in a speech in August 2010 that income from tourism was "fundamental to rebuilding and rebalancing the UK's economy".

The BHA responded in its proposition to government – detailed in its report *Creating Jobs in Britain* – with three UK objectives:

- **The creation of 236,000 (9,980 in Wales) additional jobs by 2015 and a further 239,000 (12,060 in Wales) by 2020.**
- **To lift the domestic proportion of what people spend on tourism activity to 50 per cent (2010: 40 per cent).**
- **For Britain to be one of the top five destinations in the world in terms of revenue from inbound tourism (we are currently seventh).**

BHA Wales welcomes the growing support which the industry has received from both the Welsh and UK governments but it recognises that there remains much more that can be done. New challenges are created by global economic uncertainty and its impact on consumer confidence. These are compounded by significant barriers to growing the Welsh hospitality economy – chiefly the UK's lack of price competitiveness.

Growing the hospitality economy of the UK depends on improving this position so that the whole UK economy, including Wales, can benefit.

Hospitality – impact on local economies 5

The value of the visitor economy to the four countries of the UK is well known. In total, domestic and overseas visitor spend is approximately £38bn – see Table 1.

But how important is the hospitality industry to each local authority in terms of employment, and how much is this contribution worth? Using the results of the Oxford Economics research the following tables and commentaries provide a complete picture of the contribution of the hospitality industry to the economy of every local authority area in Wales.

Table 1: **Spend by overseas and domestic visitors to English regions, Scotland, Wales and Northern Ireland, including day visitors.**

Region	Expenditure £bn (total domestic and overseas visitor spend, 2009)	Direct employment in hospitality 2010
ENGLAND	72.07	2,045,470
SCOTLAND	8.57	222,083
WALES	4.19	112,227
NORTHERN IRELAND	1.67	60,803
TOTAL	**86.48**	**2,440,583**

How many people does hospitality employ in Wales' local authority areas?

In terms of hospitality employment (Table 2), by far the largest local authorities are Cardiff and Swansea; employment in rural areas is more spread-out. But, as important as the total number of employees is the percentage of total employment. This indicates the relative importance of hospitality to the economy. As a percentage of the total employment, Conwy and Gwynedd stand out as the authorities most dependent on hospitality in terms of employment. Merthyr is the only local authority area where this number falls below nine per cent.

We define indirect employment as those jobs sustained in the supply sector of the industry, for example, food and beverage manufacture, business services such as advertising and market research, agriculture and communications. Induced employment represents those jobs sustained by the spending of direct and indirect persons employed, such jobs in retail outlets, companies producing consumer goods and a range of service industries.

>>>

Table 2: **Hospitality employment – Wales (2010).**

Rank	Local Authority	Direct employment	Indirect and induced employment	% Direct, indirect and induced employment to total
1	Gwynedd	8,383	3,697	19.9
2	Conwy	6,338	2,571	19.2
3	Pembrokeshire	6,053	2,558	15.2
4	Anglesey	2,505	1,163	14.5
5	Monmouthshire	3,800	1,885	14.4
=6	Swansea	10,240	5,292	14.0
=6	Denbighshire	4,298	2,075	14.0
8	The Vale of Glamorgan	4,124	1,838	13.6
9	Newport	6,436	3,384	13.3
10	Cardiff	17,215	9,297	12.9
11	Ceredigion	2,993	1,422	11.8
12	Bridgend	4,633	2,534	11.3
13	Powys	4,949	2,488	11.0
14	Flintshire	5,051	2,727	10.7
15	Wrexham	3,919	2,083	10.3
16	Carmarthenshire	4,905	2,605	10.1
=17	Torfaen	2,225	1,193	9.4
=17	Rhondda, Cynon, Taff	4,990	2,537	9.4
19	Blaenau Gwent	1,257	632	9.3
20	Neath Port Talbot	2,968	1,407	9.2
21	Caerphilly	3,555	1,809	9.1
22	Merthyr Tydfil	1,392	733	8.7
	TOTAL	**113,226**	**168,189**	**12.5**

Which areas earn the most from hospitality?

Looking at the total contribution of the hospitality industry in Wales to total Gross Value Added, the top ranked areas are also predominantly major cities. But when we look at the percentage of direct, indirect and induced hospitality GVA to total GVA (Table 3), a different picture emerges. Here, it is clear that hospitality is a major contributor to wages and profits in all key tourism areas. There is a clear correlation between visitor numbers, levels of employment and GVA.

This is clearly evident again in the case of Gwynedd and Conwy in north Wales, where almost a fifth of GVA comes from the hospitality industry, and other strong performing holiday locations such as Ceredigion on the west coast of Wales and Pembrokeshire.

Table 3: What the hospitality industry is worth to each Welsh local authority in GVA.

Rank	Local Authority	GVA of direct, indirect and induced employment £m (2005 prices)	% of direct, indirect and induced GVA to total
1	Gwynedd	275	19.5
2	Conwy	215	18.4
3	Ceredigion	103	13.3
4	Pembrokeshire	225	12.5
5	Denbighshire	143	12.0
6	Anglesey	84	11.7
7	Monmouthshire	139	11.4
8	Powys	172	10.9
9	The Vale of Glamorgan	152	10.5
10	Swansea	348	10.4
11	Newport	260	9.5
12	Cardiff	683	9.0
13	Bridgend	166	8.2
14	Carmarthenshire	154	7.9
15	Wrexham	130	7.0
16	Flintshire	161	6.6
17	Neath Port Talbot	97	6.5
18	Merthyr Tydfil	40	6.1
19	Rhondda, Cynon, Taff	140	6.0
20	Caerphilly	109	5.9
21	Torfaen	66	5.8
22	Blaenau Gwent	35	5.7
	TOTAL	**3,897**	**9.4**

Local authorities and the tourism industry 6

The key role that local authorities in Wales play in growing the tourism and hospitality industry in their area lies not just in funding local tourism initiatives but in their general approach to the economic development of the locality and the part that our industry can play in this. The hospitality industry enables both local residents and visitors to enjoy the area in many different and profitable ways; it also provides business and social facilities that are key to the area's sustainable future.

There are many different strands to this.

1. Economic

We have already stressed the value of the industry to local authority areas – and see pages 18-23 for the full list of local authorities in Wales and the UK.

2. Environmental

Tourism depends on an area's attractions and on its intrinsic attractiveness. The local authority carries significant responsibility for enhancing these qualities through planning and other regulations, particularly in Areas of Outstanding Natural Beauty and National Parks. This includes the general tidiness of the area but extends to the provision of car parks at reasonable cost, the regular emptying of litter bins, the provision of floral displays and flower baskets, the timely opening and cleanliness of public toilets, good signposting, and the provision of local maps on boards and other sources of information which may not necessarily, but could be, information centres.

3. Cultural

Many local authorities already recognise the importance of events and festivals in their area. These not only attract visitors to the area but also re-invigorate interest by local residents in their town. They are one of the most effective means whereby the local authority can promote the area, attract new visitors and encourage repeat visits. The Welsh Government continues enthusiastically to support cultural tourism and has encouraged the work of the Cultural Tourism Partnership. The Welsh Local Government Association is an active partner in this work.

4. Licensing

Local authorities have jurisdiction over most areas of licensing but the area most concerning the hospitality industry is liquor licensing. Few other areas impinge so directly on both local businesses and local residents – the former, for obvious commercial reasons, as businesses wish to stay open for as long as there is sustainable demand, and the latter who are concerned about street noise, rowdiness and crime caused by heavy drinking. The Police Reform and Social Responsibility Act gives local authorities in England and Wales two new powers, Early Morning Restriction Orders and the Late Night Levy which they will be able to decide whether to use or not. We believe that these powers are unnecessary and, if they are used, should be used only after extensive consultation with local hospitality businesses.

5. Food safety

An area where local authorities influence business activities is the introduction of the Food Standards Agency's Food Hygiene Rating Scheme in England, Wales and Northern Ireland. Despite the FSA's inexplicable decision in 2008 to have a six point (0 to 5) scoring system instead of Scotland's preferable "pass"/ "improvement required", the scheme was launched in the autumn of 2010. The BHA is pleased all local authorities in Wales are adopting the national scheme and are not introducing their own variation (some based on star ratings) which would have been confusing for both for those businesses that operate over a number of different local authority areas and for customers who will confuse star ratings with hotel star ratings. The BHA welcomes a national review of the scheme in 2012.

>>>

6. Planning

The BHA in Wales welcomes a less restrictive planning regime but recognises concerns that some building projects will inevitably impinge on the environment. Local authorities must be sensitive both to the needs of the industry and the local environment.

7. Encouraging investment

Every local authority has a key role to play in promoting the area as a good place in which to do business. Resort areas, in particular, have suffered in the past from failing visitor numbers with declining general popularity and visitor income. It is undeniable that most hotel investment is in or near major urban areas; more investment is needed in both rural and coastal areas. Local authorities are able to help influence this through planning and other policies that recognise hospitality's role as a major job creator. Faster broadband access to those areas of Wales currently only able to access 'slowband' would not only improve business communications but would give parity to business tourism and would improve the guest experience for services that are the norm in most metropolitan areas. It was unfortunate that an opportunity to insert fibre optic cable into the same trench as the Milford Haven to the Midlands gas pipeline was lost.

8. Promotion

With promotion of local hotels, restaurants and attractions comes the question of standards and quality. In many cases, the standard of accommodation provided in a town reflects its image and most local tourism bodies insist that businesses that appear in their local guide are inspected and quality approved either through the National Harmonised Grading Scheme or through local assessment and approval. We ask local authorities to support our belief that standards of accommodation provided in their area must meet competitive standards; they must recognise that Wales tourism is competing on a world stage.

9. Skills

Improving skills provision is an essential part of delivering growth and local authorities have a major role to play in the provision of local further and higher education colleges, many of which provide courses and training for the hospitality and tourism industry. Funding for catering courses – which are necessarily expensive – is being cut back. The industry's growth will certainly be inhibited if businesses, which send their youngsters on day or block release to local colleges, are denied the essential skills on which their very existence depends.

10. Transport

Good transport links enable people to visit the area and to move about within the area. For Wales, the electrification of the railway system would greatly benefit tourist areas west of Cardiff while the upgrade of the A55 in North Wales is critical. In addition, fuel duty relief for public service vehicles in rural areas would help to increase the frequency and range of routes and, more importantly, access to jobs for those living in employment black spots. Local authorities must recognise that holidaymakers will need to be persuaded that spending ever-higher sums of money on transport to a destination will be worth it in terms of value for money, the quality of the product, the attractiveness of the area and the enjoyment provided.

Growth of hospitality jobs by 2020 7

In researching its report on the value of hospitality to local economies, Oxford Economics looked at the future of the industry across the UK generally. In Wales, those local authorities with the highest levels of direct hospitality employment are projected to create the largest number of net additional hospitality jobs by 2020.

Table 4 shows the forecast growth in the total number of new jobs created in hospitality in Wales between 2010 when there were 112,229 jobs recorded, and 2020 when a total of 134,269 is projected. Across the UK, the growth between 2010 and 2020 is estimated at 475,000. Wales represents 22,040 of this number (4.6 per cent).

Table 4: **Direct hospitality employment in Wales' local authorities in 2010 – and how it will grow by 2020.**

Local Authority	Number (112,229) in direct employment (2010)	Number (134,269) in direct employment (2020)
Anglesey	2,505	2,978
Blaenau Gwent	1,257	1,505
Bridgend	4,633	5,544
Caerphilly	3,555	4,283
Cardiff	17,215	20,616
Carmarthenshire	5,905	5,867
Ceredigion	2,993	3,598
Conwy	6,338	7,627
Denbighshire	4,298	5,156
Flintshire	5,051	6,000
Gwynedd	8,383	9,922
Merthyr Tydfil	1,392	1,655
Monmouthshire	3,800	4,567
Neath Port Talbot	2,968	3,563
Newport	6,436	7,658
Pembrokeshire	6,053	7,294
Powys	4,949	5,948
Rhondda, Cynon, Taff	4,990	5,951
Swansea	10,240	12,232
The Vale of Glamorgan	4,124	4,976
Torfaen	2,225	2,655
Wrexham	3,919	4,674
TOTAL	**112,229**	**134,269**

The hospitality industry's strong record of investment in Wales

The hospitality industry's record of investment continues, despite the recent recession. Over 50 new hotels, at all price levels, have opened since 2000 throughout Wales, representing more than 3,800 rooms; more are planned to open in the next few years. With the refurbishment of existing properties, this represents an investment of some £1bn.

This also applies to the restaurant industry, where many new establishments have opened, standards have been raised and a wider championing of local food and locally sourced ingredients has helped expand Wales' reputation as a European culinary destination.

This investment reaches into every corner of the country providing opportunities for growth and new jobs that few other industries can provide. If policies that encourage growth, stimulate investment and help create jobs can be further implemented extended and more support is introduced and sustained, hospitality will be able to play its rightful, central role as the economic driver of local authority areas in Wales.

8 What of the future?

Hospitality is a major contributor to the wealth and prosperity of every local authority in Wales; it also holds an important position in its social life. Without hospitality, and the benefits in jobs, incomes and social interaction that the industry brings, many parts of the country would have limited economic prospects.

If the right framework is provided, hospitality and the wider tourism industry in Wales can be sustained, nurtured and encouraged to grow. If policies that encourage growth, stimulate investment and help create jobs are implemented and maintained, hospitality will be able to play an even more important role as the driver of local economies than it has in the past.

BHA Wales's Agenda for Welsh Tourism Growth (page 5) highlights the initial actions and immediate policies that we believe will encourage growth, stimulate investment and jobs create jobs in the hospitality industry.

BHA Wales is committed to playing a full part in supporting the Welsh Government and local authorities in delivering the measures needed to maximise returns from the industry.

We are confident that with positive engagement, practical policies and full commitment from industry and elected representatives, the industry will be able to play the lead role in driving local economies throughout Wales.

The opportunity is there to be grasped for the benefit of the whole nation.

APPENDIX 1: VAT – barrier to growth

The high rate of UK VAT on hotel accommodation is a significant deterrent to national growth and job creation. Member states of the EU recognise that tourism is an extremely price-sensitive sector, subject to intense international competition; as a result, all but two others (Denmark and Slovakia) have a reduced rate of VAT on accommodation. They recognise that the direct revenues foregone as a result of the reduced rate concession are compensated by the additional demand that reduced rates generate, and the creation of new jobs.

France, for example, has a reduced rate on accommodation at 5.5 per cent (which is now applied to restaurant meals); Germany's rate is seven per cent and Italy's rate is 10 per cent. Fourteen other countries have also introduced a reduced rate for restaurant meals and for admission to amusement parks.

The latest country to reduce VAT on hotels, restaurants and other tourism establishments is the Republic of Ireland, where VAT is being reduced to nine per cent from 1st July 2011 until December 2013. This reduction, from the already low 13.5 per cent, will mean that Wales' tourist industry in particular will be even more uncompetitive vis-à-vis the Republic of Ireland than it was before.

Table 5: Rates of VAT in EU member states.

	VAT at standard rate (%)	Rate of VAT for hotel accommodation (%)	Rate of VAT for admission to amusement parks (%)	Rate of VAT for meals in restaurants (%)
Austria	20	10	10	10
Belgium	21	6	6	12
Bulgaria	20	9	20	20
Cyprus	15	8	5	8
Czech Republic	20	10	10	20
Denmark	25	25	25	25
Estonia	20	9	20	20
Finland	23	9	9	13
France	19.6	5.5	5.5	5.5
Germany	19	7	19	19
Greece	23	6.5	13	13
Hungary	25	18	25	25
Ireland	21	9	9	9
Italy	20	10	20	10
Latvia	22	12	22	22
Lithuania	21	9	21	21
Luxembourg	15	3	3	3
Malta	18	7	18	18
Netherlands	19	6	6	6
Poland	23	8	8	8
Portugal	23	6	6	13
Romania	24	9	9	24
Slovakia	20	20	20	20
Slovenia	20	8.5	8.5	8.5
Spain	18	8	8	8
Sweden	25	12	25	25
UK	20	20	20	20

Note: *This table is simplified; some countries have variations in their rate for particular items and services; most countries do not reduce the rate of VAT on alcohol taken with meals even if there is a reduced rate for the meal itself.*

These low rates of VAT for accommodation make the whole of the UK, including Wales, uncompetitive compared with the rest of Europe. This will remain the case for as long as VAT remains at the present high rate.

The high rate of VAT exacerbates the rising cost of travel and transport which represents a particular disadvantage to remote and rural businesses in Wales. Rising fuel prices are making it increasingly expensive for visitors to travel to these destinations.

Reducing VAT will attract more overseas visitors to Wales as well as encouraging more British people to holiday here – thus boosting demand. The principal benefit of this to the Welsh economy will be the creation of more jobs and greater wealth.

Other fiscal policies also negatively impact on the hospitality industry; these include visa charges and Air Passenger Duty.

Through visa controls, visa charges make the UK much more difficult and more expensive to access for some of our key target markets – China, India and other growth economies. Being outside the Schengen Agreement, the UK imposes an additional charge on visa processing which acts as a deterrent to those travellers who would like to visit Wales while travelling to countries within the Agreement.

Delays in visa processing by the UK are identified as that most likely to cause potential visitors to give up on their travel plans. In a survey by the European Tour Operators Association, 58,000 tourists cancelled their trips to the UK in 2009 owing to slow visa processing; ETOA estimates that nearly 314,000 decided not even to apply. In this scenario, Wales also misses out.

APD is another tax that inhibits travel and thus reduces visitor numbers. Although it raises prices for British residents travelling abroad – which potentially might benefit the domestic industry by discouraging overseas holidays – APD is also levied on overseas visitors to the UK (including Wales), making visits that much more expensive.

If the value of sterling against the Euro had not been so much in UK tourism's favour in the last five years, thus reducing the relative cost to the European market of visiting the UK, the impact of APD would have been significantly more damaging to Welsh tourism than it has been. Nevertheless, it remains an inhibiting factor and will certainly become even more regressive when (rather than if) APD in increased.

These fiscal policies particularly affect Wales because of the decline in the proportion of total UK tourism expenditure spent on holidays north of the border to holidays abroad. The number of domestic visitors to Wales has fallen from 13.75m in 2006 to 12.4m in 2010, although spend is up marginally from £2.61bn to £2.63bn.

APPENDIX 2:
The value of hospitality to local authorities in Wales

The following tables give details of the number of people directly and indirectly employed by the hospitality industry in each local authority area in Wales and the rest of the UK, together with the GVA of the industry. The final column forecasts the number in direct employment in 2020.

Table 6: Hospitality employment and GVA in local authorities in Wales.

WALES	Local Authority	Direct hospitality employment		Direct, indirect and induced hospitality employment		Direct hospitality GVA (2005 prices, £m)		Direct, indirect and induced hospitality GVA (2005 prices, £m)		Direct hospitality employment
		2010	% of total economy employment	2010	% of total economy employment	2010	% of total economy GVA	2010	% of total economy GVA	2020
Wales	Anglesey	2,505	9.9%	3,668	14.5%	41	5.8%	84	11.7%	2,978
Wales	Blaenau Gwent	1,257	6.2%	1,889	9.3%	17	2.8%	35	5.7%	1,505
Wales	Bridgend	4,633	7.3%	7,197	11.3%	77	3.8%	166	8.2%	5,544
Wales	Caerphilly	3,555	6.0%	5,364	9.1%	52	2.8%	109	5.9%	4,283
Wales	Cardiff	17,215	8.4%	26,512	12.9%	321	4.2%	683	9.0%	20,616
Wales	Carmarthenshire	4,905	6.6%	7,510	10.1%	73	3.8%	154	7.9%	5,867
Wales	Ceredigion	2,993	8.0%	4,415	11.8%	51	6.5%	103	13.3%	3,598
Wales	Conwy	6,338	13.7%	8,909	19.2%	111	9.5%	215	18.4%	7,627
Wales	Denbighshire	4,298	9.4%	6,373	14.0%	70	5.9%	143	12.0%	5,156
Wales	Flintshire	5,051	6.9%	7,778	10.7%	76	3.1%	161	6.6%	6,000
Wales	Gwynedd	8,383	13.8%	12,080	19.9%	138	9.8%	275	19.5%	9,922
Wales	Merthyr Tydfil	1,392	5.7%	2,125	8.7%	19	2.9%	40	6.1%	1,655
Wales	Monmouthshire	3,800	9.6%	5,685	14.4%	67	5.5%	139	11.4%	4,567
Wales	Neath Port Talbot	2,968	6.2%	4,375	9.2%	47	3.2%	97	6.5%	3,563
Wales	Newport	6,436	8.7%	9,820	13.3%	123	4.5%	260	9.5%	7,658
Wales	Pembrokeshire	6,053	10.7%	8,611	15.2%	114	6.4%	225	12.5%	7,294
Wales	Powys	4,949	7.3%	7,437	11.0%	83	5.3%	172	10.9%	5,948
Wales	Rhondda, Cynon, Taff	4,990	6.2%	7,527	9.4%	67	2.9%	140	6.0%	5,951
Wales	Swansea	10,240	9.2%	15,532	14.0%	166	5.0%	348	10.4%	12,232
Wales	The Vale of Glamorgan	4,124	9.4%	5,962	13.6%	76	5.2%	152	10.5%	4,976
Wales	Torfaen	2,225	6.1%	3,418	9.4%	31	2.7%	66	5.8%	2,655
Wales	Wrexham	3,919	6.7%	6,002	10.3%	62	3.3%	130	7.0%	4,674
REGION TOTAL		**112,229**	**8.3%**	**168,189**	**12.5%**	**1,882**	**4.6%**	**3,897**	**9.4%**	**134,269**

UK Regions	Local Authority	Direct hospitality employment		Direct, indirect and induced hospitality employment		Direct hospitality GVA (2005 prices, £m)		Direct, indirect and induced hospitality GVA (2005 prices, £m)		Direct hospitality employment
		2010	% of total economy employment	2010	% of total economy employment	2010	% of total economy GVA	2010	% of total economy GVA	2020
North East	County Durham	16,164	8.8%	24,644	13.3%	234	4.2%	494	8.9%	19,205
North East	Darlington	3,944	7.7%	5,843	11.4%	55	3.4%	112	6.9%	4,708
North East	Gateshead	6,869	6.9%	10,426	10.5%	106	3.1%	223	6.4%	8,257
North East	Hartlepool	2,316	7.0%	3,457	10.4%	30	2.9%	62	6.0%	2,785
North East	Middlesbrough	5,031	7.5%	7,600	11.3%	66	3.3%	139	6.9%	6,009
North East	Newcastle upon Tyne	17,689	9.7%	25,704	14.1%	272	4.5%	547	9.0%	21,115
North East	North Tyneside	5,470	7.2%	8,328	10.9%	83	3.2%	174	6.7%	6,554
North East	Northumberland	11,143	8.8%	16,538	13.0%	168	4.6%	344	9.5%	13,359
North East	Redcar and Cleveland	3,044	7.1%	4,540	10.6%	41	2.9%	86	5.9%	3,648
North East	South Tyneside	3,471	7.5%	5,084	11.0%	49	3.2%	99	6.5%	4,185
North East	Stockton-on-Tees	6,057	7.1%	9,245	10.8%	80	2.8%	170	5.9%	7,285
North East	Sunderland	9,993	8.1%	14,694	11.9%	146	3.3%	297	6.7%	11,763
REGION TOTAL		**91,191**	**8.2%**	**136,103**	**12.1%**	**1,330**	**3.7%**	**2,747**	**7.6%**	**108,873**
North West	Allerdale	4,746	10.9%	7,154	16.4%	78	7.4%	166	15.8%	5,692
North West	Barrow-in-Furness	2,320	7.0%	3,235	9.8%	32	3.5%	62	6.9%	2,763
North West	Blackburn with Darwen	3,298	5.0%	5,216	7.9%	44	2.3%	98	5.2%	3,894
North West	Blackpool	8,565	12.7%	12,300	18.2%	142	8.6%	287	17.4%	10,321
North West	Bolton	7,589	6.6%	11,923	10.4%	105	3.1%	232	6.9%	9,075
North West	Burnley	2,740	7.8%	4,296	12.2%	37	3.5%	82	7.7%	3,243
North West	Bury	5,150	7.3%	7,867	11.2%	80	3.7%	171	7.9%	6,167
North West	Carlisle	4,812	8.1%	7,591	12.7%	70	4.5%	155	9.9%	5,742
North West	Cheshire East	15,192	7.9%	24,107	12.6%	280	3.9%	627	8.7%	18,358
North West	Cheshire West & Chester	15,393	9.4%	24,107	14.7%	280	4.6%	617	10.3%	18,476
North West	Chorley	3,759	8.2%	5,628	12.3%	60	4.7%	126	9.8%	4,514
North West	Copeland	2,258	7.1%	3,462	10.9%	38	3.2%	82	6.9%	2,697
North West	Eden	4,686	15.6%	6,873	22.9%	81	10.6%	168	21.9%	5,645
North West	Fylde	4,277	9.3%	6,522	14.2%	88	4.2%	189	8.9%	5,134
North West	Halton	3,666	6.8%	5,845	10.8%	69	3.0%	154	6.7%	4,389
North West	Hyndburn	1,776	5.8%	2,847	9.3%	25	2.8%	56	6.3%	2,104
North West	Knowsley	2,537	4.3%	4,006	6.8%	40	2.0%	88	4.5%	2,990
North West	Lancaster	5,471	9.2%	8,682	14.5%	92	4.8%	206	10.7%	6,569
North West	Liverpool	21,533	9.0%	33,453	13.9%	379	4.9%	831	10.7%	25,696
North West	Manchester	31,108	9.7%	46,395	14.4%	569	4.8%	1,196	10.1%	37,072
North West	Oldham	5,521	6.5%	8,627	10.2%	76	3.1%	167	6.8%	6,601
North West	Pendle	2,217	6.6%	3,483	10.4%	33	3.4%	74	7.6%	2,657
North West	Preston	6,756	7.3%	10,599	11.4%	106	3.9%	234	8.6%	8,065
North West	Ribble Valley	3,225	9.7%	4,853	14.5%	55	4.6%	116	9.9%	3,892
North West	Rochdale	5,179	6.1%	8,119	9.6%	69	2.7%	153	5.9%	6,184
North West	Rossendale	1,210	5.2%	1,928	8.3%	17	2.6%	37	5.8%	1,449
North West	Salford	9,760	8.0%	15,366	12.5%	175	4.1%	388	9.1%	11,468
North West	Sefton	9,096	8.8%	13,917	13.5%	145	4.8%	313	10.4%	10,886
North West	South Lakeland	9,510	15.7%	13,662	22.5%	185	11.3%	375	22.9%	11,472
North West	South Ribble	3,098	5.5%	4,930	8.7%	47	2.7%	106	6.1%	3,699
North West	St. Helens	5,174	7.9%	8,214	12.5%	78	4.0%	174	9.0%	6,126
North West	Stockport	7,887	5.6%	12,502	8.9%	137	2.7%	306	6.1%	9,430
North West	Tameside	4,598	5.8%	7,173	9.0%	70	2.6%	154	5.6%	5,502
North West	Trafford	8,767	6.5%	13,797	10.2%	151	2.9%	335	6.5%	10,463
North West	Warrington	10,008	8.4%	15,670	13.1%	171	4.0%	378	8.9%	11,738
North West	West Lancashire	3,531	7.2%	5,630	11.4%	61	3.8%	137	8.6%	4,205
North West	Wigan	7,675	6.9%	12,202	10.9%	115	3.4%	257	7.5%	9,141
North West	Wirral	8,894	8.4%	13,812	13.0%	122	3.9%	267	8.4%	10,666
North West	Wyre	3,820	9.6%	5,782	14.5%	55	5.0%	118	10.7%	4,601
REGION TOTAL	**REGION TOTAL**	**266,802**	**8.1%**	**411,775**	**12.4%**	**4,457**	**4.1%**	**9,682**	**8.9%**	**318,786**
Yorkshire & the Humber	Barnsley	5,055	6.5%	7,961	10.2%	69	2.8%	152	6.2%	6,049
Yorkshire & the Humber	Bradford	12,604	6.0%	19,641	9.3%	191	2.7%	419	6.0%	15,033
Yorkshire & the Humber	Calderdale	5,665	6.0%	8,907	9.4%	86	2.5%	189	5.6%	6,790
Yorkshire & the Humber	Craven	3,303	9.4%	5,139	14.7%	48	4.9%	104	10.6%	3,988
Yorkshire & the Humber	Doncaster	8,000	6.5%	12,588	10.2%	107	2.9%	236	6.5%	9,539
Yorkshire & the Humber	East Riding of Yorkshire	9,975	7.2%	15,221	11.0%	141	3.2%	303	6.9%	11,973
Yorkshire & the Humber	Hambleton	3,587	7.4%	5,462	11.3%	52	4.0%	112	8.5%	4,302
Yorkshire & the Humber	Harrogate	8,107	9.0%	12,474	13.9%	136	5.2%	294	11.3%	9,824
Yorkshire & the Humber	Kingston upon Hull, City of	8,001	6.5%	12,143	9.9%	101	2.6%	216	5.6%	9,446
Yorkshire & the Humber	Kirklees	9,761	5.8%	15,427	9.2%	132	2.6%	293	5.7%	11,742
Yorkshire & the Humber	Leeds	30,432	7.3%	47,316	11.4%	517	3.4%	1,128	7.4%	36,085
Yorkshire & the Humber	North East Lincolnshire	4,906	6.6%	7,532	10.2%	68	2.9%	146	6.3%	5,849
Yorkshire & the Humber	North Lincolnshire	5,089	6.8%	7,947	10.6%	69	2.3%	151	5.0%	6,006
Yorkshire & the Humber	Richmondshire	2,278	8.1%	3,418	12.1%	32	5.9%	68	12.4%	2,738

UK Regions	Local Authority	Direct hospitality employment		Direct, indirect and induced hospitality employment		Direct hospitality GVA (2005 prices, £m)		Direct, indirect and induced hospitality GVA (2005 prices, £m)		Direct hospitality employment
		2010	% of total economy employment	2010	% of total economy employment	2010	% of total economy GVA	2010	% of total economy GVA	2020
Yorkshire & the Humber	Rotherham	6,151	5.9%	9,530	9.1%	81	2.6%	177	5.6%	7,323
Yorkshire & the Humber	Ryedale	2,511	9.2%	3,735	13.7%	37	5.1%	78	10.6%	3,017
Yorkshire & the Humber	Scarborough	7,296	14.9%	10,669	21.7%	115	8.9%	237	18.4%	8,802
Yorkshire & the Humber	Selby	2,824	8.0%	4,354	12.3%	44	3.2%	95	6.8%	3,362
Yorkshire & the Humber	Sheffield	19,645	7.4%	30,419	11.5%	294	3.5%	640	7.7%	23,301
Yorkshire & the Humber	Wakefield	10,157	6.8%	15,694	10.5%	135	2.9%	292	6.2%	12,114
Yorkshire & the Humber	York	10,960	10.0%	16,664	15.2%	176	4.9%	376	10.5%	13,119
REGION TOTAL		**176,307**	**7.2%**	**272,241**	**11.2%**	**2,631**	**3.3%**	**5,706**	**7.2%**	**210,402**
East Midlands	Amber Valley	3,873	7.1%	6,152	11.3%	67	3.3%	151	7.3%	4,661
East Midlands	Ashfield	2,643	5.1%	4,186	8.1%	44	2.1%	99	4.7%	3,168
East Midlands	Bassetlaw	3,123	6.2%	4,913	9.8%	50	3.0%	112	6.6%	3,745
East Midlands	Blaby	3,407	6.2%	5,502	10.1%	54	2.7%	122	6.2%	4,083
East Midlands	Bolsover	1,685	5.8%	2,571	8.9%	26	2.6%	56	5.5%	2,026
East Midlands	Boston	1,972	6.3%	3,146	10.1%	27	3.2%	60	7.2%	2,341
East Midlands	Broxtowe	3,199	7.1%	5,074	11.2%	49	3.2%	110	7.2%	3,827
East Midlands	Charnwood	4,693	6.7%	7,596	10.9%	80	3.3%	182	7.6%	5,635
East Midlands	Chesterfield	3,331	6.7%	5,024	10.1%	50	3.2%	107	6.8%	3,951
East Midlands	Corby	1,611	5.5%	2,491	8.5%	29	2.4%	62	5.3%	1,903
East Midlands	Daventry	2,827	7.1%	4,578	11.6%	46	3.2%	106	7.4%	3,386
East Midlands	Derby	9,210	7.5%	14,079	11.5%	155	3.1%	334	6.7%	10,891
East Midlands	Derbyshire Dales	4,052	9.8%	6,274	15.2%	61	5.1%	134	11.0%	4,876
East Midlands	East Lindsey	7,134	12.9%	10,629	19.3%	123	8.6%	259	18.0%	8,589
East Midlands	East Northamptonshire	1,949	6.2%	3,161	10.0%	30	2.9%	68	6.6%	2,343
East Midlands	Erewash	2,815	6.9%	4,213	10.3%	46	3.3%	96	7.0%	3,380
East Midlands	Gedling	2,650	6.9%	4,098	10.7%	38	2.9%	84	6.4%	3,178
East Midlands	Harborough	3,320	8.2%	5,044	12.4%	53	4.1%	113	8.7%	3,978
East Midlands	High Peak	2,788	8.0%	4,390	12.6%	46	4.0%	101	8.8%	3,369
East Midlands	Hinckley and Bosworth	4,057	9.5%	6,228	14.6%	56	3.9%	121	8.5%	4,802
East Midlands	Kettering	3,033	7.3%	4,920	11.8%	48	3.5%	109	8.0%	3,631
East Midlands	Leicester	10,614	6.4%	16,544	9.9%	162	2.8%	355	6.1%	12,546
East Midlands	Lincoln	4,485	7.8%	7,150	12.5%	61	3.5%	136	7.8%	5,368
East Midlands	Mansfield	3,030	7.1%	4,704	11.0%	39	3.1%	86	6.8%	3,616
East Midlands	Melton	1,651	7.3%	2,666	11.7%	24	3.4%	54	7.8%	1,970
East Midlands	Newark and Sherwood	6,381	12.2%	9,854	18.9%	117	7.1%	253	15.4%	7,689
East Midlands	North East Derbyshire	2,314	7.5%	3,642	11.8%	32	3.2%	70	7.1%	2,791
East Midlands	North Kesteven	2,729	6.1%	4,421	10.0%	39	3.3%	88	7.5%	3,299
East Midlands	North West Leicestershire	4,082	7.6%	6,625	12.3%	69	3.5%	159	7.9%	4,859
East Midlands	Northampton	8,840	6.7%	13,949	10.6%	153	3.1%	339	6.9%	10,468
East Midlands	Nottingham	15,621	8.1%	24,216	12.6%	273	3.9%	596	8.5%	18,596
East Midlands	Oadby and Wigston	1,127	5.4%	1,788	8.6%	15	2.3%	34	5.1%	1,350
East Midlands	Rushcliffe	3,754	8.0%	5,943	12.7%	52	3.6%	115	8.0%	4,477
East Midlands	Rutland	1,733	8.9%	2,582	13.2%	30	5.5%	64	11.4%	2,082
East Midlands	South Derbyshire	2,569	8.0%	4,117	12.8%	39	3.2%	88	7.1%	3,102
East Midlands	South Holland	1,826	4.9%	2,942	7.8%	24	2.2%	55	5.0%	2,172
East Midlands	South Kesteven	4,610	7.8%	7,456	12.6%	75	4.1%	171	9.3%	5,520
East Midlands	South Northamptonshire	2,888	8.1%	4,659	13.1%	54	3.9%	122	8.9%	3,478
East Midlands	Wellingborough	2,144	6.3%	3,508	10.3%	37	2.9%	85	6.7%	2,565
East Midlands	West Lindsey	1,729	5.9%	2,801	9.5%	24	2.8%	54	6.4%	2,073
REGION TOTAL		**155,499**	**7.4%**	**243,836**	**11.6%**	**2,497**	**3.5%**	**5,510**	**7.7%**	**185,784**
West Midlands	Birmingham	36,840	7.4%	56,712	11.3%	761	4.2%	1,637	9.1%	43,821
West Midlands	Bromsgrove	3,942	10.0%	6,005	15.2%	74	6.2%	157	13.3%	4,764
West Midlands	Cannock Chase	3,136	7.6%	4,643	11.2%	55	4.5%	115	9.3%	3,771
West Midlands	Coventry	10,334	6.8%	15,765	10.4%	224	4.2%	477	9.0%	12,377
West Midlands	Dudley	7,629	5.8%	11,589	8.8%	124	3.3%	262	7.1%	9,122
West Midlands	East Staffordshire	4,357	7.1%	6,946	11.3%	78	3.9%	175	8.7%	5,224
West Midlands	Herefordshire, County of	6,337	6.5%	10,001	10.3%	122	4.7%	268	10.4%	7,580
West Midlands	Lichfield	3,663	7.6%	5,844	12.1%	66	4.2%	146	9.4%	4,420
West Midlands	Malvern Hills	2,799	8.7%	4,299	13.3%	59	5.4%	126	11.7%	3,366
West Midlands	Newcastle-under-Lyme	4,033	7.8%	6,274	12.1%	73	4.7%	158	10.2%	4,831
West Midlands	North Warwickshire	4,184	9.5%	6,503	14.7%	96	5.9%	208	12.8%	4,962
West Midlands	Nuneaton and Bedworth	2,711	6.1%	4,184	9.4%	52	3.8%	112	8.2%	3,305
West Midlands	Redditch	2,399	6.0%	3,742	9.3%	52	3.7%	112	8.1%	2,890
West Midlands	Rugby	4,418	9.4%	6,727	14.3%	98	5.6%	207	12.0%	5,280
West Midlands	Sandwell	7,163	5.3%	11,246	8.4%	130	2.8%	286	6.1%	8,473
West Midlands	Shropshire	10,678	7.2%	16,555	11.2%	201	4.7%	435	10.3%	12,785
West Midlands	Solihull	11,599	11.2%	16,905	16.4%	289	7.2%	590	14.6%	14,417
West Midlands	South Staffordshire	2,917	8.5%	4,637	13.5%	55	4.8%	122	10.8%	3,522

UK Regions	Local Authority	Direct hospitality employment		Direct, indirect and induced hospitality employment		Direct hospitality GVA (2005 prices, £m)		Direct, indirect and induced hospitality GVA (2005 prices, £m)		Direct hospitality employment
		2010	% of total economy employment	2010	% of total economy employment	2010	% of total economy GVA	2010	% of total economy GVA	2020
West Midlands	Stafford	5,565	8.2%	8,862	13.0%	102	4.9%	226	10.8%	6,654
West Midlands	Staffordshire Moorlands	2,208	6.0%	3,439	9.3%	42	3.6%	91	7.8%	2,656
West Midlands	Stoke-on-Trent	6,869	5.9%	10,573	9.1%	125	3.4%	270	7.4%	8,139
West Midlands	Stratford-on-Avon	7,241	11.0%	11,060	16.8%	161	7.1%	343	15.1%	8,746
West Midlands	Tamworth	2,446	8.3%	3,531	11.9%	44	5.1%	88	10.3%	2,945
West Midlands	Telford and Wrekin	5,760	6.8%	9,258	11.0%	110	4.2%	248	9.3%	6,844
West Midlands	Walsall	5,795	5.7%	8,971	8.8%	106	3.2%	230	7.0%	6,891
West Midlands	Warwick	7,378	8.1%	11,704	12.8%	154	4.7%	341	10.5%	8,786
West Midlands	Wolverhampton	7,665	6.8%	11,682	10.4%	141	3.8%	300	8.2%	9,075
West Midlands	Worcester	4,421	7.8%	6,305	11.1%	80	4.5%	159	9.1%	5,276
West Midlands	Wychavon	4,136	7.4%	6,547	11.7%	81	4.5%	179	10.1%	4,975
West Midlands	Wyre Forest	2,998	8.1%	4,426	12.0%	57	4.9%	118	10.1%	3,600
REGION TOTAL		**191,621**	**7.4%**	**294,935**	**11.3%**	**3,812**	**4.4%**	**8,186**	**9.5%**	**229,497**
East of England	Babergh	2,697	7.3%	4,361	11.8%	42	3.8%	95	8.8%	3,237
East of England	Basildon	5,430	6.0%	8,361	9.3%	95	2.8%	207	6.1%	6,435
East of England	Bedford	6,233	8.2%	9,959	13.1%	113	4.1%	256	9.3%	7,354
East of England	Braintree	3,780	6.4%	6,134	10.3%	59	3.0%	135	6.8%	4,528
East of England	Breckland	3,386	6.9%	5,442	11.1%	50	3.3%	113	7.4%	3,994
East of England	Brentwood	2,760	6.7%	4,327	10.5%	55	2.9%	121	6.3%	3,300
East of England	Broadland	3,369	5.9%	5,471	9.6%	64	3.0%	147	6.8%	4,039
East of England	Broxbourne	2,146	4.9%	3,510	8.1%	38	2.2%	88	5.2%	2,562
East of England	Cambridge	7,370	7.9%	10,661	11.5%	145	4.2%	297	8.6%	8,763
East of England	Castle Point	1,898	7.5%	2,920	11.5%	30	3.9%	66	8.4%	2,277
East of England	Central Bedfordshire	8,398	8.3%	13,600	13.4%	120	3.3%	275	7.6%	10,028
East of England	Chelmsford	6,644	7.1%	10,837	11.5%	107	3.4%	246	7.8%	7,917
East of England	Colchester	6,771	7.7%	11,073	12.5%	123	4.4%	284	10.2%	8,071
East of England	Dacorum	5,170	7.8%	7,954	12.1%	108	3.8%	234	8.2%	6,171
East of England	East Cambridgeshire	1,443	4.5%	2,338	7.3%	25	2.3%	58	5.2%	1,722
East of England	East Hertfordshire	5,395	8.1%	8,149	12.3%	101	3.7%	216	8.0%	6,480
East of England	Epping Forest	4,680	7.9%	6,942	11.7%	83	4.1%	174	8.6%	5,617
East of England	Fenland	1,939	5.2%	3,138	8.3%	31	2.5%	72	5.8%	2,303
East of England	Forest Heath	3,599	13.2%	5,239	19.3%	86	9.5%	177	19.5%	4,316
East of England	Great Yarmouth	5,521	12.7%	8,002	18.4%	122	8.8%	250	17.9%	6,625
East of England	Harlow	2,636	6.4%	3,961	9.6%	52	2.9%	110	6.0%	3,118
East of England	Hertsmere	4,290	9.1%	6,465	13.7%	89	4.1%	190	8.7%	5,137
East of England	Huntingdonshire	5,552	6.8%	9,002	11.1%	102	3.5%	234	8.0%	6,642
East of England	Ipswich	4,832	6.7%	7,021	9.8%	84	3.1%	172	6.4%	5,744
East of England	King`s Lynn and West Norfolk	5,264	8.1%	8,396	12.9%	92	4.8%	206	10.7%	6,295
East of England	Luton	6,130	6.7%	9,463	10.4%	109	3.1%	238	6.7%	7,212
East of England	Maldon	1,767	7.0%	2,854	11.3%	34	3.9%	78	9.0%	2,127
East of England	Mid Suffolk	2,326	5.5%	3,764	9.0%	38	2.7%	88	6.1%	2,740
East of England	North Hertfordshire	4,110	8.0%	6,470	12.6%	74	4.2%	163	9.3%	4,949
East of England	North Norfolk	4,066	10.3%	6,275	16.0%	75	6.4%	163	13.8%	4,899
East of England	Norwich	7,510	8.1%	11,623	12.5%	124	4.0%	271	8.8%	8,996
East of England	Peterborough	7,722	7.3%	12,427	11.7%	136	3.6%	310	8.3%	9,105
East of England	Rochford	2,105	8.0%	3,152	11.9%	33	3.6%	70	7.5%	2,527
East of England	South Cambridgeshire	4,117	5.3%	6,616	8.6%	84	2.5%	190	5.7%	4,874
East of England	South Norfolk	3,213	5.8%	5,187	9.3%	62	3.3%	142	7.4%	3,844
East of England	Southend-on-Sea	6,492	8.7%	9,602	12.9%	101	4.2%	210	8.7%	7,780
East of England	St Albans	6,159	8.1%	9,189	12.1%	132	4.4%	277	9.3%	7,460
East of England	St Edmundsbury	3,831	6.0%	6,247	9.9%	64	3.0%	147	6.9%	4,550
East of England	Stevenage	3,205	6.9%	5,102	11.1%	63	3.3%	141	7.3%	3,843
East of England	Suffolk Coastal	4,768	8.7%	7,712	14.0%	92	4.4%	211	10.0%	5,718
East of England	Tendring	3,869	8.3%	5,861	12.6%	63	4.6%	134	9.8%	4,619
East of England	Three Rivers	2,987	7.9%	4,776	12.6%	65	3.5%	146	7.9%	3,601
East of England	Thurrock	4,966	7.4%	7,782	11.7%	79	3.5%	175	7.8%	5,914
East of England	Uttlesford	3,730	8.9%	5,753	13.7%	69	4.4%	149	9.6%	4,485
East of England	Watford	6,015	8.6%	8,563	12.2%	119	4.2%	239	8.5%	7,098
East of England	Waveney	4,504	9.3%	7,248	15.0%	75	4.9%	170	11.2%	5,408
East of England	Welwyn Hatfield	4,651	5.9%	7,189	9.2%	96	2.9%	209	6.2%	5,482
REGION TOTAL		**209,446**	**7.5%**	**326,118**	**11.6%**	**3,803**	**3.7%**	**8,344**	**8.2%**	**249,906**
London	Barking and Dagenham	2,638	5.4%	3,872	7.9%	59	2.8%	115	5.5%	3,095
London	Barnet	11,207	8.3%	16,000	11.9%	247	4.7%	469	9.0%	13,461
London	Bexley	4,890	6.3%	7,289	9.5%	96	3.4%	191	6.8%	5,822
London	Brent	8,776	8.2%	13,021	12.2%	201	4.9%	398	9.6%	10,322
London	Bromley	8,553	6.8%	12,600	10.0%	174	3.8%	342	7.4%	10,202
London	Camden	28,325	9.0%	39,058	12.4%	768	4.4%	1,411	8.1%	33,904

UK Regions	Local Authority	Direct hospitality employment		Direct, indirect and induced hospitality employment		Direct hospitality GVA (2005 prices, £m)		Direct, indirect and induced hospitality GVA (2005 prices, £m)		Direct hospitality employment
		2010	% of total economy employment	2010	% of total economy employment	2010	% of total economy GVA	2010	% of total economy GVA	2020
London	City of London	20,418	5.8%	26,964	7.7%	520	1.7%	915	2.9%	24,264
London	Croydon	9,268	6.8%	13,108	9.6%	215	4.0%	406	7.6%	10,984
London	Ealing	10,971	9.0%	16,072	13.2%	250	4.9%	489	9.6%	13,005
London	Enfield	6,897	6.3%	10,343	9.5%	148	3.8%	296	7.6%	8,212
London	Greenwich	5,419	6.8%	7,723	9.7%	118	3.9%	224	7.5%	6,478
London	Hackney	6,173	6.2%	8,870	8.8%	156	3.5%	299	6.7%	7,418
London	Hammersmith and Fulham	11,628	8.6%	16,162	12.0%	312	4.1%	579	7.6%	13,917
London	Haringey	4,639	6.3%	6,951	9.5%	102	3.6%	204	7.2%	5,517
London	Harrow	4,688	5.9%	7,004	8.9%	111	3.6%	221	7.2%	5,630
London	Havering	6,437	7.5%	9,346	10.9%	126	4.0%	244	7.8%	7,703
London	Hillingdon	16,470	8.5%	23,797	12.3%	450	5.1%	866	9.7%	19,488
London	Hounslow	9,709	7.3%	14,221	10.8%	242	4.3%	472	8.4%	11,428
London	Islington	14,212	6.9%	19,733	9.6%	358	3.6%	663	6.7%	16,907
London	Kensington and Chelsea	21,065	16.8%	27,599	22.0%	611	10.0%	1,066	17.5%	25,600
London	Kingston upon Thames	8,146	9.3%	11,467	13.0%	197	6.3%	371	11.8%	9,785
London	Lambeth	12,151	8.3%	16,554	11.2%	312	4.9%	567	8.9%	14,494
London	Lewisham	4,862	6.8%	6,983	9.8%	109	3.9%	208	7.5%	5,729
London	Merton	5,415	7.2%	7,980	10.6%	114	4.3%	225	8.5%	6,505
London	Newham	6,438	7.4%	9,475	10.9%	151	4.1%	296	8.0%	7,576
London	Redbridge	5,482	7.1%	7,726	10.0%	125	4.2%	234	8.0%	6,506
London	Richmond upon Thames	8,694	10.5%	12,393	14.9%	216	6.5%	411	12.4%	10,594
London	Southwark	14,814	7.5%	20,641	10.5%	393	4.8%	730	8.9%	17,841
London	Sutton	4,376	5.7%	6,183	8.1%	87	3.2%	165	6.0%	5,216
London	Tower Hamlets	13,109	5.7%	18,252	7.9%	340	2.0%	631	3.7%	15,617
London	Waltham Forest	3,582	5.3%	5,259	7.8%	72	2.9%	141	5.8%	4,247
London	Wandsworth	10,619	8.7%	15,223	12.5%	264	4.3%	504	8.2%	12,722
London	Westminster	86,434	13.4%	115,853	18.0%	2,394	6.5%	4,276	11.6%	103,936
REGION TOTAL		**396,505**	**8.4%**	**553,722**	**11.8%**	**10,038**	**4.3%**	**18,629**	**7.9%**	**474,125**
South East	Adur	1,380	6.1%	2,121	9.3%	24	3.1%	51	6.5%	1,661
South East	Arun	5,335	11.0%	7,541	15.6%	114	7.3%	221	14.1%	6,410
South East	Ashford	4,472	7.4%	6,951	11.5%	75	4.0%	160	8.5%	5,327
South East	Aylesbury Vale	4,795	6.0%	7,500	9.4%	99	3.2%	213	7.0%	5,702
South East	Basingstoke and Deane	6,010	6.5%	9,400	10.1%	124	3.0%	267	6.5%	7,147
South East	Bracknell Forest	6,081	9.6%	8,559	13.6%	127	3.9%	246	7.6%	7,069
South East	Brighton and Hove	14,799	10.8%	21,033	15.3%	288	6.1%	561	11.8%	17,757
South East	Canterbury	5,824	8.2%	8,385	11.8%	97	4.7%	192	9.4%	6,945
South East	Cherwell	6,941	8.9%	10,777	13.8%	141	4.4%	301	9.3%	8,301
South East	Chichester	5,767	8.8%	8,905	13.5%	117	5.4%	247	11.5%	6,965
South East	Chiltern	2,220	5.7%	3,331	8.6%	45	2.9%	93	5.9%	2,654
South East	Crawley	7,657	8.8%	10,785	12.4%	165	3.9%	319	7.6%	9,058
South East	Dartford	4,263	7.7%	6,367	11.4%	90	4.2%	185	8.5%	5,069
South East	Dover	3,567	8.4%	5,323	12.6%	68	4.7%	140	9.6%	4,238
South East	East Hampshire	3,941	6.9%	6,041	10.6%	69	4.1%	145	8.7%	4,705
South East	Eastbourne	4,470	9.9%	5,890	13.1%	99	6.2%	179	11.1%	5,366
South East	Eastleigh	4,635	6.9%	7,146	10.6%	79	3.6%	168	7.7%	5,499
South East	Elmbridge	5,797	9.0%	8,897	13.8%	123	4.5%	258	9.4%	6,984
South East	Epsom and Ewell	2,582	8.1%	3,607	11.3%	52	4.2%	99	8.1%	3,076
South East	Fareham	3,399	6.2%	5,115	9.3%	62	3.3%	129	6.7%	4,044
South East	Gosport	1,679	6.5%	2,455	9.5%	28	3.5%	56	7.1%	2,004
South East	Gravesham	2,741	8.7%	3,971	12.7%	51	4.6%	101	9.2%	3,263
South East	Guildford	6,707	7.8%	10,024	11.7%	137	3.9%	282	8.1%	7,961
South East	Hart	3,791	9.1%	5,435	13.1%	85	5.3%	166	10.5%	4,563
South East	Hastings	2,603	7.6%	3,725	10.9%	46	4.1%	90	8.1%	3,096
South East	Havant	3,220	7.1%	4,507	10.0%	66	3.9%	126	7.6%	3,867
South East	Horsham	3,913	6.7%	6,104	10.4%	76	3.4%	162	7.3%	4,678
South East	Isle of Wight	6,534	11.2%	9,409	16.2%	130	7.5%	257	14.8%	7,824
South East	Lewes	2,728	6.8%	4,133	10.2%	51	3.9%	107	8.0%	3,244
South East	Maidstone	6,145	7.4%	9,257	11.2%	118	4.5%	243	9.2%	7,309
South East	Medway	7,235	7.4%	10,620	10.8%	120	3.9%	241	7.8%	8,530
South East	Mid Sussex	5,157	8.3%	7,674	12.3%	103	4.5%	210	9.3%	6,179
South East	Milton Keynes	10,253	6.8%	15,782	10.5%	214	3.4%	451	7.2%	12,241
South East	Mole Valley	3,499	7.5%	5,114	11.0%	80	3.6%	160	7.2%	4,216
South East	New Forest	7,662	9.4%	10,946	13.4%	145	5.6%	284	10.9%	9,217
South East	Oxford	8,686	7.8%	12,273	11.1%	187	4.3%	363	8.3%	10,373
South East	Portsmouth	9,708	8.1%	13,719	11.5%	180	4.3%	348	8.4%	11,588
South East	Reading	8,629	8.7%	12,596	12.7%	182	4.4%	364	8.9%	10,232
South East	Reigate and Banstead	4,892	7.0%	6,996	10.0%	102	3.4%	200	6.6%	5,859

UK Regions	Local Authority	Direct hospitality employment		Direct, indirect and induced hospitality employment		Direct hospitality GVA (2005 prices, £m)		Direct, indirect and induced hospitality GVA (2005 prices, £m)		Direct hospitality employment
		2010	% of total economy employment	2010	% of total economy employment	2010	% of total economy GVA	2010	% of total economy GVA	2020
South East	Rother	3,796	11.1%	5,486	16.0%	82	7.5%	162	14.8%	4,556
South East	Runnymede	3,881	6.7%	5,592	9.7%	82	3.1%	162	6.0%	4,555
South East	Rushmoor	3,247	6.0%	4,564	8.4%	68	2.7%	130	5.2%	3,831
South East	Sevenoaks	4,202	8.3%	6,360	12.5%	84	4.9%	174	10.1%	5,084
South East	Shepway	3,692	8.7%	5,620	13.2%	72	4.6%	150	9.7%	4,370
South East	Slough	4,552	5.5%	6,787	8.2%	99	2.4%	203	4.9%	5,326
South East	South Bucks	4,197	11.2%	6,178	16.4%	101	5.5%	204	11.1%	5,031
South East	South Oxfordshire	5,569	9.0%	8,369	13.6%	113	5.4%	234	11.1%	6,697
South East	Southampton	8,891	7.7%	13,257	11.5%	166	3.8%	339	7.7%	10,576
South East	Spelthorne	3,883	9.8%	5,624	14.2%	79	4.4%	158	8.7%	4,595
South East	Surrey Heath	4,630	8.1%	6,671	11.6%	103	4.4%	204	8.7%	5,531
South East	Swale	3,725	7.1%	5,778	11.0%	71	4.1%	150	8.7%	4,448
South East	Tandridge	3,414	8.9%	4,939	12.8%	66	5.1%	130	10.1%	4,034
South East	Test Valley	4,346	7.8%	6,798	12.1%	85	4.3%	183	9.2%	5,183
South East	Thanet	4,418	9.4%	6,276	13.3%	75	5.4%	147	10.5%	5,264
South East	Tonbridge and Malling	3,912	6.3%	5,985	9.6%	72	3.3%	152	6.9%	4,626
South East	Tunbridge Wells	4,271	7.8%	6,652	12.1%	82	4.2%	175	9.1%	5,083
South East	Vale of White Horse	4,106	6.4%	6,129	9.5%	84	3.1%	172	6.3%	4,873
South East	Waverley	4,377	7.2%	6,524	10.7%	89	3.8%	181	7.7%	5,199
South East	Wealden	5,759	9.5%	8,425	14.0%	112	5.9%	224	11.8%	6,804
South East	West Berkshire	6,926	7.1%	10,718	11.1%	153	3.6%	324	7.6%	8,240
South East	West Oxfordshire	3,352	6.8%	5,205	10.5%	68	3.8%	144	8.2%	4,009
South East	Winchester	5,824	7.3%	8,679	10.9%	127	4.4%	260	8.9%	6,939
South East	Windsor and Maidenhead	7,285	8.5%	10,442	12.2%	165	4.0%	324	7.8%	8,727
South East	Woking	3,659	7.1%	5,268	10.3%	70	3.6%	138	7.1%	4,363
South East	Wokingham	4,684	5.8%	6,823	8.5%	99	2.8%	198	5.5%	5,503
South East	Worthing	3,388	6.9%	4,864	9.9%	64	3.5%	126	6.8%	4,023
South East	Wycombe	5,617	6.5%	8,184	9.5%	119	3.1%	239	6.2%	6,716
REGION TOTAL		**339,320**	**7.9%**	**500,611**	**11.6%**	**6,809**	**4.1%**	**13,772**	**8.3%**	**404,407**
South West	Bath and North East Somerset	8,029	8.6%	12,868	13.8%	165	4.7%	373	10.7%	9,625
South West	Bournemouth	10,070	12.7%	14,209	17.9%	207	6.9%	412	13.7%	12,072
South West	Bristol, City of	17,665	7.1%	28,404	11.5%	347	3.3%	785	7.5%	20,983
South West	Cheltenham	4,811	8.1%	7,662	12.8%	96	4.2%	215	9.5%	5,743
South West	Christchurch	1,891	8.7%	2,834	13.0%	35	5.1%	75	10.7%	2,275
South West	Cornwall	28,580	11.6%	44,400	18.0%	480	7.7%	1,050	16.9%	34,306
South West	Cotswold	4,365	9.8%	6,545	14.6%	92	6.6%	194	14.0%	5,246
South West	East Devon	5,469	9.7%	8,178	14.5%	89	6.0%	188	12.7%	6,583
South West	East Dorset	2,134	5.9%	3,483	9.7%	37	3.2%	86	7.5%	2,560
South West	Exeter	5,735	5.7%	8,650	8.5%	90	2.7%	191	5.8%	6,821
South West	Forest of Dean	1,613	5.2%	2,622	8.5%	30	3.1%	69	7.2%	1,922
South West	Gloucester	3,868	5.7%	6,161	9.1%	66	2.6%	149	5.8%	4,571
South West	Isles of Scilly	298	15.9%	476	25.3%	6	17.5%	13	39.3%	360
South West	Mendip	4,035	7.8%	6,538	12.6%	67	4.2%	154	9.6%	4,848
South West	Mid Devon	1,853	5.9%	3,006	9.5%	30	3.3%	69	7.6%	2,227
South West	North Devon	6,061	12.1%	8,572	17.1%	116	8.0%	232	15.8%	7,259
South West	North Dorset	1,802	5.7%	2,855	9.1%	29	3.3%	65	7.4%	2,134
South West	North Somerset	6,575	7.5%	10,735	12.2%	135	3.9%	312	9.0%	7,865
South West	Plymouth	8,643	7.3%	13,771	11.6%	153	4.1%	343	9.2%	10,310
South West	Poole	5,581	6.6%	8,999	10.6%	103	3.7%	234	8.3%	6,651
South West	Purbeck	2,569	11.0%	3,694	15.8%	55	7.4%	111	14.9%	3,070
South West	Sedgemoor	4,544	9.4%	7,140	14.7%	79	5.3%	174	11.7%	5,433
South West	South Gloucestershire	8,898	5.7%	14,627	9.4%	161	2.6%	373	6.0%	10,558
South West	South Hams	4,169	9.6%	6,578	15.2%	77	6.5%	172	14.5%	5,010
South West	South Somerset	4,879	5.9%	7,917	9.6%	77	3.0%	176	6.8%	5,806
South West	Stroud	3,831	7.1%	6,229	11.6%	69	3.6%	158	8.3%	4,578
South West	Swindon	8,588	7.1%	12,784	10.6%	154	2.9%	323	6.1%	10,239
South West	Taunton Deane	4,578	7.4%	7,394	12.0%	83	4.4%	189	9.9%	5,400
South West	Teignbridge	5,034	9.5%	7,865	14.8%	90	5.9%	198	13.0%	6,066
South West	Tewkesbury	2,732	6.4%	4,385	10.3%	52	3.2%	118	7.1%	3,262
South West	Torbay	7,870	14.2%	11,559	20.8%	156	10.1%	324	20.9%	9,466
South West	Torridge	1,947	8.1%	3,055	12.7%	32	5.9%	70	13.1%	2,342
South West	West Devon	2,387	10.5%	3,675	16.2%	40	7.1%	87	15.3%	2,875
South West	West Dorset	4,610	8.1%	7,185	12.6%	85	5.3%	188	11.7%	5,517
South West	West Somerset	1,658	10.3%	2,449	15.2%	39	6.1%	82	12.7%	1,998
South West	Weymouth and Portland	3,598	14.8%	4,897	20.2%	60	9.1%	115	17.4%	4,337
South West	Wiltshire	17,803	7.8%	28,992	12.7%	341	4.8%	783	10.9%	21,147
REGION TOTAL		**218,773**	**8.2%**	**341,393**	**12.8%**	**4,023**	**4.5%**	**8,850**	**9.9%**	**261,465**

UK Regions	Local Authority	Direct hospitality employment		Direct, indirect and induced hospitality employment		Direct hospitality GVA (2005 prices, £m)		Direct, indirect and induced hospitality GVA (2005 prices, £m)		Direct hospitality employment
		2010	% of total economy employment	2010	% of total economy employment	2010	% of total economy GVA	2010	% of total economy GVA	2020
Scotland	Aberdeen City	16,703	9.2%	24,874	13.7%	310	4.5%	643	9.4%	19,715
Scotland	Aberdeenshire	7,223	6.9%	11,049	10.5%	144	3.8%	308	8.0%	8,615
Scotland	Angus	3,227	7.5%	4,899	11.4%	53	4.1%	113	8.6%	3,861
Scotland	Argyll & Bute	4,980	10.8%	7,743	16.7%	100	7.7%	217	16.7%	5,978
Scotland	Clackmannanshire	953	5.9%	1,498	9.3%	17	2.9%	37	6.3%	1,131
Scotland	Dumfries & Galloway	5,638	8.5%	8,474	12.7%	106	5.7%	222	12.0%	6,788
Scotland	Dundee City	6,328	8.1%	9,239	11.8%	112	4.1%	227	8.3%	7,528
Scotland	East Ayrshire	2,653	5.9%	4,183	9.3%	37	3.0%	81	6.6%	3,169
Scotland	East Dunbartonshire	2,136	8.2%	3,347	12.9%	40	3.7%	88	8.0%	2,582
Scotland	East Lothian	2,806	9.1%	4,362	14.2%	54	4.8%	116	10.5%	3,362
Scotland	East Renfrewshire	1,858	8.3%	2,755	12.3%	29	4.2%	61	8.8%	2,234
Scotland	Edinburgh, City of	32,387	10.0%	49,212	15.1%	663	4.7%	1,405	10.0%	38,794
Scotland	Eilean Siar	917	7.7%	1,428	11.9%	16	5.7%	34	12.3%	1,096
Scotland	Falkirk	4,609	7.5%	6,933	11.3%	83	3.1%	174	6.4%	5,518
Scotland	Fife	11,260	8.2%	17,863	12.9%	193	4.2%	428	9.2%	13,464
Scotland	Glasgow City	35,358	8.4%	53,704	12.8%	627	4.2%	1,328	8.8%	42,295
Scotland	Highland	13,923	12.1%	21,715	18.9%	242	8.8%	526	19.1%	16,657
Scotland	Inverclyde	2,125	7.3%	3,346	11.4%	29	3.1%	63	6.9%	2,533
Scotland	Midlothian	1,831	6.2%	2,808	9.4%	33	3.2%	72	6.8%	2,191
Scotland	Moray	3,053	7.2%	4,615	10.9%	47	5.1%	100	10.7%	3,656
Scotland	North Ayrshire	4,351	10.0%	6,617	15.3%	73	5.1%	155	10.9%	5,195
Scotland	North Lanarkshire	9,126	6.8%	14,453	10.7%	144	3.1%	317	6.9%	10,810
Scotland	Orkney Islands	1,037	7.7%	1,626	12.1%	17	5.4%	37	11.8%	1,244
Scotland	Perth & Kinross	8,125	10.8%	12,381	16.5%	155	6.6%	330	13.9%	9,718
Scotland	Renfrewshire	6,408	8.0%	9,934	12.3%	118	3.8%	255	8.2%	7,652
Scotland	Scottish Borders	4,116	8.3%	6,229	12.5%	66	5.0%	138	10.6%	4,877
Scotland	Shetland Islands	962	5.6%	1,558	9.0%	17	3.7%	39	8.4%	1,143
Scotland	South Ayrshire	5,879	11.4%	8,836	17.2%	121	7.5%	253	15.6%	7,059
Scotland	South Lanarkshire	9,271	7.2%	14,674	11.4%	149	3.3%	329	7.3%	11,082
Scotland	Stirling	4,973	9.9%	7,835	15.6%	87	5.5%	191	12.1%	5,965
Scotland	West Dunbartonshire	2,984	8.8%	4,622	13.6%	58	4.4%	125	9.5%	3,570
Scotland	West Lothian	4,881	5.9%	7,735	9.4%	86	2.9%	189	6.4%	5,811
REGION TOTAL		**222,081**	**8.6%**	**340,547**	**13.1%**	**4,026**	**4.5%**	**8,601**	**9.5%**	**265,293**
Northern Ireland	Antrim	2,236	7.7%	3,343	11.5%	39	4.2%	80	8.7%	2,664
Northern Ireland	Ards	2,009	8.5%	2,967	12.6%	31	4.7%	63	9.4%	2,417
Northern Ireland	Armagh	1,358	5.3%	2,071	8.1%	23	3.5%	47	7.3%	1,620
Northern Ireland	Ballymena	1,857	5.4%	2,850	8.3%	31	2.6%	64	5.6%	2,220
Northern Ireland	Ballymoney	495	4.8%	756	7.3%	7	2.5%	14	5.3%	594
Northern Ireland	Banbridge	1,277	7.5%	1,885	11.1%	21	4.0%	43	8.1%	1,539
Northern Ireland	Belfast	15,915	7.8%	23,777	11.6%	260	3.5%	533	7.1%	19,020
Northern Ireland	Carrickfergus	943	9.6%	1,361	13.9%	15	5.0%	30	9.9%	1,138
Northern Ireland	Castlereagh	1,699	5.9%	2,490	8.6%	29	3.7%	59	7.4%	2,015
Northern Ireland	Coleraine	2,850	10.6%	4,210	15.7%	49	6.1%	99	12.4%	3,434
Northern Ireland	Cookstown	1,035	6.8%	1,480	9.7%	18	4.7%	36	9.3%	1,241
Northern Ireland	Craigavon	2,834	6.8%	4,363	10.5%	44	3.1%	94	6.5%	3,407
Northern Ireland	Derry	3,736	7.9%	5,777	12.3%	60	4.4%	128	9.2%	4,477
Northern Ireland	Down	2,436	9.8%	3,545	14.2%	41	6.7%	83	13.4%	2,934
Northern Ireland	Dungannon	1,407	5.1%	2,141	7.8%	25	3.1%	52	6.5%	1,680
Northern Ireland	Fermanagh	2,246	7.9%	3,325	11.7%	41	5.6%	83	11.4%	2,695
Northern Ireland	Larne	798	7.3%	1,142	10.4%	13	3.2%	26	6.3%	960
Northern Ireland	Limavady	922	7.9%	1,304	11.2%	14	4.6%	28	8.9%	1,105
Northern Ireland	Lisburn	3,148	6.6%	4,825	10.2%	49	3.5%	103	7.3%	3,781
Northern Ireland	Magherafelt	1,096	5.7%	1,601	8.3%	18	3.2%	35	6.4%	1,319
Northern Ireland	Moyle	657	11.6%	1,049	18.5%	10	8.7%	21	19.1%	793
Northern Ireland	Newry & Mourne	3,143	7.3%	4,635	10.7%	50	4.4%	102	8.9%	3,781
Northern Ireland	Newtownabbey	1,771	5.3%	2,758	8.3%	28	2.5%	59	5.4%	2,113
Northern Ireland	North Down	2,847	10.1%	3,985	14.1%	48	6.1%	92	11.8%	3,428
Northern Ireland	Omagh	1,416	6.0%	2,100	8.9%	23	3.9%	47	7.9%	1,702
Northern Ireland	Strabane	672	5.8%	985	8.5%	10	3.4%	19	6.7%	808
REGION TOTAL		**60,803**	**7.3%**	**90,725**	**10.9%**	**997**	**3.9%**	**2,040**	**8.0%**	**72,885**
UK TOTAL		**2,440,583**	**7.9%**	**3,680,189**	**11.9%**	**46,299**	**4.1%**	**95,951**	**8.5%**	**2,915,690**

British Hospitality Association members

1 LOMBARD STREET (JESSEN & CO), LONDON
247 RECRUIT, WOKING
60 HOPE STREET RESTAURANT, LIVERPOOL
AAGRAH GROUP, SHIPLEY
ABM CATERING, COVENTRY
ABODE HOTELS, BATH
ACADEMY OF FOOD & WINE SERVICE, SUTTON
ACCENT CATERING SERVICES, MIDDLESEX
ACCOR HOTELS, LONDON
ACT, LONDON
ACTIVEION (EUROPE), BADEN
ADMIRAL GROUP, LONDON
ADNAMS & CO, SOUTHWOLD
ALBARINO PAPPAS & WINE, WESTGATE-ON-SEA
ALBERTINE, LONDON
ALEXANDER'S WINE BAR BRASSERIE, UXBRIDGE
ALEXANDRA HOTEL, HIGH WYCOMBE
ALEXANDRA HOTEL, LYME REGIS
ALLERDALE COURT HOTEL, COCKERMOUTH
ALVESTON HOUSE HOTEL, BRISTOL
AM PM SCOTLAND, ABERFELDY
AMBASSADOR HOTEL, LLANDUDNO
AMCOMM LTD, BALAERES
ANDAZ LONDON (HYATT), LONDON
ANDREW EDMUNDS, LONDON
ANGEL HUMAN RESOURCES, LONDON
ANIMAL INNS, NORWICH
ANN'S PANTRY, MOELFRE
APEX HOTELS LTD, EDINBURGH
APRICOT CATERING, HEREFORD
ARAMARK, FARNBOROUGH
ARMY & NAVY CLUB, LONDON
ARTIZIAN CATERING SERVICES LTD, READING
ARUNDEL HOUSE, CHEDDAR
ARUNDELL ARMS HOTEL, LIFTON
ASCOT HOUSE HOTEL, HARROGATE
ASTLEY BANK HOTEL, DARWEN
AUCHRANNIE HOTEL, ISLE OF ARRAN
AUTOGRAPH FOODSERVICE, SLOUGH
AVINGTON FINANCIAL, LONDON
AVOCA HOUSE HOTEL, LONDON
AYNSOME MANOR HOTEL, GRANGE-OVER-SANDS
A-Z RESTAURANTS, LONDON
BAGLIONI HOTELS, LONDON
BAILIFFSCOURT HOTEL, LITTLEHAMPTON
BALDWINS OMEGA, SHEFFIELD
BALMORAL HOTEL, EDINBURGH
BAMBOO REVENUE, LONDON
BANCHORY LODGE HOTEL, BANCHORY
BAR BATTU, LONDON
BARCELO HOTELS, HINCKLEY
BARCLAYS BANK, LONDON
BARNSLEY COLLEGE
BARRELL INN, HOPE VALLEY
BARRY HOUSE HOTEL, LONDON
BARTLETT MITCHELL, EGHAM
BATH PRIORY
BAUMANNS BRASSERIE, COLCHESTER
BAXTERSTOREY (HOLROYD HOWE), READING
BEANSHEAF HOTEL, MALTON
BEAVER HOTEL, LONDON
BEDFORD ARMS HOTEL, RICKMANSWORTH
BEDFORD LODGE HOTEL, NEWMARKET
BEECHWOOD HOTEL, NORTH WALSHAM
BELL ROCK HOTEL, ISLES OF SCILLY
BELLE HOUSE, PERSHORE
BEN WYVIS HOTEL, STRATHPEFFER
BENGAL DYNASTY, DEESIDE
BENTLEY BROOK HOTEL, ASHBOURNE
BERRY HEAD HOTEL, BRIXHAM
BEST WESTERN HOTELS, YORK
BIBENDUM, LONDON
BIBURY COURT HOTEL, CIRENCESTER
BINGHAM HOTEL, RICHMOND-ON-THAMES
BLAS AR FWYD, CONWY
BLEEDING HEART, LONDON
BLUE APPLE CONTRACT CATERING, WOKINGHAM
BOATSIDE, HEXHAM
BOODLE'S, ONDON
BOSWELL HOUSE HOTEL, CHELMSFORD
BOURNEMOUTH AREA HOSPITALITY ASSOCIATION
BOURNEMOUTH UNIVERSITY, POOLE
BOVEY CASTLE, DARTMOOR NATIONAL PARK
BOWOOD HOTEL, SPA AND GOLF RESORT, CALNE
BOXMOOR LODGE HOTEL, HEMEL HEMPSTEAD
BP & SEM CONSULTANTS, LANGLEY
BRADLEY'S RESTAURANT, HUDDERSFIELD
BRAKES, LONDON
BREND HOTELS LTD, BARNSTAPLE
BRIDGE HOTEL, COCKERMOUTH
BRIDGE OF ORCHY HOTEL, BRIDGE OF ORCHY
BRIGHTON & HOVE HOTELS ASSOCIATION
BRIGHTON MARINA HOUSE HOTEL, BRIGHTON
BRINKLEYS, LONDON
BROCKENCOTE HALL HOTEL, KIDDERMINSTER
BROOKLANDS HOTEL, WEYBRIDGE
BROOK'S, BRIGHOUSE
BROOKSIDE HOTEL, CHESTER
BROOKS'S, LONDON
BROOKSTREET DES ROCHES LLP, ABINGDON
BROOKWOOD PARTNERSHIP, WALTON-ON-THAMES
BROWN'S HOTEL, LONDON
BRULA, TWICKENHAM
BRYCES, DORKING
BRYN BRAS CASTLE, CAERNARFON
BRYN-Y-MOR HOTEL, LLANDUDNO
BUFFALO BILLS, SOUTHAMPTON
BUNZL LOCKHART CATERING, READING
BURPHAM COUNTRY HOUSE & RESTAURANT, ARUNDEL
BURTON INNS, BURTON-ON-TRENT
BURTON LODGE HOTEL, DRIFFIELD
BUSH HALL HOTEL, HATFIELD
BUSINESS ANWYHERE, ALLOA
BUTLEY (ORFORD) OYSTERAGE, WOODBRIDGE
CAER BERIS MANOR HOTEL, BUILTH WELLS
CAERLYR HALL HOTEL, CONWY
CAFE PACIFICO, LONDON
CAFE RUBIK, CHELTENHAM
CAFE SPICE NAMASTE, LONDON
CAFE TWENTYONE NEWCASTLE, NEWCASTLE-UPON-TYNE
CAIRN LODGE SERVICES LTD, LANARK
CALCOT MANOR HOTEL, TETBURY
CALEDONIAN CLUB, LONDON
CALF'S HEAD, CLITHEROE
CALOR GAS, WARWICK
CAMBUS O'MAY HOTEL, BALLATER
CANDLESTICKS INN, RINGWOOD
CANTLEY HOUSE HOTEL, WOKINGHAM
CAPARO HOTELS, TORQUAY
CAPITAL HOTEL, LONDON
CAPRICE HOLDINGS, LONDON
CARAFFINI, LONDON
CARLTON CLUB, LONDON
CARLUCCIOS, LONDON
CARMARTHENSHIRE TOURISM ASSOCIATION, AMMANFORD
CASA ROMANA, CARLISLE
CASPIAN, WORKINGTON
CASTELL MALGWYN, CARDIGAN
CASTLE COTTAGE HOTEL, HARLECH
CASTLE HOTEL, CONWY
CASTROS, LEEK
CATERER.COM, LONDON
CAVENDISH HOTEL, BAKEWELL
CELLAR GASCON, LONDON
CELTIC CATERING PARTNERSHIP, PONTYCLUN
CHAMBERLAIN'S, LONDON
CHARDON MANAGEMENT, GLASGOW
CHARLES BATHURST INN, RICHMOND
CHARLTON KINGS HOTEL, CHELTENHAM
CHATSWORTH HOTEL, EASTBOURNE
CHELTENHAM HOSPITALITY ASSOCIATION
CHERWELL BOATHOUSE, OXFORD
CHEVIN COUNTRY PARK HOTEL & SPA, OTLEY
CHEWTON GLEN HOTEL, NEW MILTON
CHEZ BRUCE, LONDON
CHEZ LINDSAY, RICHMOND-ON-THAMES
CHOI'S, CHISLEHURST
CHOUGH'S NEST HOTEL, LYNTON
CHRIS MORTON ASSOCIATES, CHESTER
CHRISTAKIS GREEK TAVERNA, LIVERPOOL
CHRISTIE GROUP PLC, LONDON
CHRISTOPHERS, LONDON
CIGALA, LONDON
CITY OF BRISTOL COLLEGE
CITY OF LONDON CLUB, LONDON
CITY UNIVERSITY CLUB, LONDON
CLARENDON HOTEL, LONDON
CLASSIC BRITISH HOTELS, WOKING
CLEANING CONCIERGE ASSOCIATION, TOKYO
CLOUD HOTEL, BROCKENHURST
CLUB GASCON, LONDON
CLUB LA COSTA RESORTS & HOTELS, LONDON
CMS CAMERON MCKENNA LLP, LONDON
COAL GRILL & BAR, HAMPTON HILL
CO SAVE LTD, HORSHAM
COLCHESTER INSTITUTE
COLEG LLANDRILLO, COLWYN BAY
COLEG MENAI, BANGOR
COLLYER BRISTOW LLP, LONDON
COLUMBIA ROAD RESTAURANT LLP, GUILDFORD
COLWALL PARK HOTEL, MALVERN
COLYERS, LONDON
COMBE HOUSE HOTEL, HONITON
CONDE NAST JOHANSENS, LONDON
CONFERENCE PARK, BIRMINGHAM
CONSIDERATE HOTELIERS ASSOCIATION, DORCHESTER
CONSTANTIA COTTAGE RESTAURANT, CROMER
COPPID BEECH HOTEL, RACKNELL
CORINTHIA HOTEL LONDON, LONDON
CORNEY & BARROW WINE BARS, LONDON
CORSE LAWN HOUSE HOTEL, GLOUCESTERSHIRE
COTSWOLD HOUSE HOTEL, CHIPPING CAMPDEN
COTTAGE IN THE WOOD HOTEL, MALVERN
COUNTY HOTEL, HEXHAM
COURTHOUSE DOUBLETREE BY HILTON LONDON
CRANBOURNE HOTEL, PLYMOUTH
CRAZY BEAR GROUP, STADHAMPTON
CRERAR HOTELS
CRESCENT HOTEL, HARROW
CRESCENT HOTEL, LONDON
CRIEFF HYDRO GROUP, CRIEFF
CROSBY LODGE HOTEL, CARLISLE
CROSS BUTTS STABLE RESTAURANT, WHITBY
CUBA LIBRE & BAR HAVANA, LONDON
CYGNET FOODS LIMITED, WARRINGTON
CYMRU CATERING, RHAYADER
D&D LONDON, LONDON
DA LUCIO, SURBITON
DALMUNZIE HOUSE HOTEL, BLAIRGOWRIE
DAMSON DENE HOTEL & LEISURE CLUB, KENDAL
DANESFIELD HOUSE HOTEL & SPA, MARLOW
DARE VALLEY COUNTRY PARK, ABERDARE
DARTINGTON HALL, TOTNES
DE VERE GROUP, ASCOT
DEEPDALE BACKPACKERS, KING'S LYNN
DELAWARE, NORTH,WEMBLEY
DEMUTHS, BATH
DENNY'S UNIFORMS, LEATHERHEAD
DEVONSHIRE ARMS HOTEL, SKIPTON
DIMITRI'S, MANCHESTER
DIPLOMAT HOTEL, LONDON
DODD & CO, CARLISLE
DOG & PARTRIDGE HOTEL, PRESTON
DOLPHIN HOTEL, LONDON
DOMINO'S PIZZA GROUP, MILTON KEYNES
DONINGTON PARK FARM HOTEL, DERBY
DORCHESTER HOTEL, LONDON
DORE GRILL, SHEFFIELD
DORMY HOUSE HOTEL, BROADWAY
DORSET SQUARE HOTEL, LONDON
DOUWE EGBERTS COFFEE SYSTEMS, SLOUGH
DRAYCOTT HOTEL, LONDON
DREAMHOUSE APARTMENTS, GLASGOW
DRIFTWOOD HOTEL, TRURO
DUCKS, ABERLADY
DUNOON HOTEL, LLANDUDNO
DUNSLEY HALL HOTEL, WHITBY
DURRANTS HOTEL, LONDON
DYVELS HOTEL, CORBRIDGE
EAST LODGE HOTEL, MATLOCK
EASTBOURNE HOSPITALITY ASSOCIATION
EASTBOURNE SEAFRONT HOTELS ASSOCIATION
EBURY WINE BAR, LONDON
ECO, LONDON
ECOPURE WATERS, HADDENHAM
EDINBURGH INTERNATIONAL CONFERENCE CENTRE
EDNAM HOUSE HOTEL, KELSO
ED'S EASY DINER, LONDON
EIGHT ACRES HOTEL & LEISURE CLUB, ELGIN
ELIOR UK, STAINES
ELITE HOTELS, FOREST ROW
ELLIOTT MARKETING & PR, MILTON KEYNES
EMILE'S, LONDON
EMPEROR OF INDIA RESTAURANT,MAIDENHEAD
EMPIRE HOTEL, LLANDUDNO
ENGLISH LAKES HOTELS, WINDERMERE
EPSOM THAI RESTAURANT, EPSOM
ESPLANADE HOTEL, LLANDUDNO
ESSEBORNE MANOR HOTEL, ANDOVER
EURO HOSTELS, GLASGOW
EVEREST INN, HYTHE
EXCLUSIVE HOTELS, BAGSHOT
EXMOOR WHITE HORSE HOTEL, MINEHEAD
EYNSHAM HALL HOTEL, WITNEY
FAIRWAYS RESTAURANT, ST. HELENS
FAIRYHILL HOTEL, SWANSEA
FAJITAS, BEDFORD
FALCON HOTEL, BUDE
FALMOUTH & DISTRICT HOTELS ASSOCIATION,
FARLAM HALL HOTEL, BRAMPTON
FARMER COPLEYS FARM SHOP, PURSTON
FARMSTAY UK, KENILWORTH
FARTHINGS RESTAURANT, LEEDS
FEATHERS HOTEL, LEDBURY
FENCE GATE INN & BANQUETING CENTRE, BURNLEY
FIRST MOTORWAY SERVICES, CALDICOT
FISCHER'S BASLOW HALL HOTEL, BAKEWELL
FISH & CHIPS @ LTD, ENFIELD
FISHERBECK HOTEL, AMBLESIDE
FIVE LAKES RESORT, ST. ALBANS
FLEMINGS HOTEL AND APARTMENTS, LONDON
FLOW HOSPITALITY TRAINING, EDINBURGH
FLYING PIZZA, LEEDS
FOOD FOR FRIENDS, BRIGHTON
FORESTDALE HOTELS, BOURNEMOUTH
FORWARD CONSORTIUM, REDDITCH
FOUR PILLARS GROUP, WITNEY
FOUR SEASONS HOTEL LONDON
FOURCROFT HOTEL, TENBY
FRENCH HORN HOTEL, READING
FRIENDS, PINNER
G & R HOSPITALITY SOLUTIONS, NEWBURY
GARRACK HOTEL, ST IVES
GENERAL TARLETON INN, KNARESBOROUGH
GEORGE OF STAMFORD HOTEL, STAMFORD
GIBBON BRIDGE HOTEL, PRESTON
GIDLEIGH PARK HOTEL, DEVON
GILPIN LODGE HOTEL, WINDERMERE
GIRAFFE GROUP, LONDON
GLAMIS CASTLE, ANGUS
GLASGOW CALEDONIAN UNIVERSITY
GLENEAGLES HOTEL, AUCHTERARDER
GLENGARRY CASTLE HOTEL, INVERGARRY
GLEWSTONE COURT HOTEL, ROSS-ON-WYE
GLIFFAES COUNTRY HOUSE HOTEL, CRICKHOWELL
GLORIA JEANS COFFEES UK, DORMANSLAND
GLOVERS SOLICITORS, LONDON
GOLDEN PHEASANT INN, KNUTSFORD
GOLF VIEW HOTEL & SPA, NAIRN
GORE HOTEL, LONDON
GOUGH HOTELS, BURY ST. EDMUNDS
GOURMET BUFFET HOUSE LTD, DUNGANNON
GRAN PARADISO, LONDON
GRAVETYE MANOR HOTEL, EAST GRINSTEAD
GREAT BARR HOTEL, BIRMINGHAM
GREATER PORTSMOUTH HOTELS ASSOCIATION
GREEN LAWNS HOTEL, FALMOUTH
GREENHEAD HOUSE, SHEFFIELD
GRIM'S DYKE HOTEL, HARROW
GROSVENOR HOTEL, ILFRACOMBE
GROSVENOR PULFORD HOTEL, CHESTER
GSS CATERING MANAGEMENT SERVICES, HARPENDEN
GUIDO'S, AMERSHAM
GUILDFORD COLLEGE OF FURTHER AND HIGHER EDUCATION
GUOMAN HOTEL MANAGEMENT, LONDON
H10 HOTELS (WATERLOO), LONDON
HALKIN HOTEL, LONDON
HALLMARK CATERING, LYMINGTON
HAMBLETON HALL HOTEL, OAKHAM
HAMPSTEAD VILLAGE GUEST HOUSE, LONDON
HAND PICKED HOTELS, SEVENOAKS
HARBOUR & JONES, LONDON
HARBOUR HOTELS GROUP, CHRISTCHURCH
HARBOURMASTER HOTEL, ABERAERON
HARD ROCK INTERNATIONAL, LONDON
HARRINGTON HALL HOTEL LTD, LONDON
HARRINGTONS, CHATHAM
HARRISON CATERING SERVICES, THAME
HARTS HOTEL, NOTTINGHAM
HAZELWOOD HOTEL, YORK
HEADLAM HALL HOTEL, DARLINGTON
HEADLAND HOTEL, NEWQUAY
HEMPEL HOTEL, LONDON
HERITAGE LEISURE GROUP, CHELMSFORD
HILTON HOTELS CORPORATION, WATFORD
HISTORIC HOUSE HOTELS, LLANDUDNO
HISTORIC SUSSEX HOTELS, MIDHURST
HOB GREEN HOTEL, HARROGATE
HOGAN LOVELLS INTERNATIONAL LLP, LONDON
HOG'S BREATH CAFE, HYDE END
HOLBECK GHYLL COUNTRY HOUSE HOTEL, WINDERMERE
HOLDWORTH HOUSE HOTEL, HALIFAX
HOLGATE HILL HOTEL, YORK
HOLT LODGE HOTEL, WREXHAM
HOSTESS, MANSFIELD
HOTEL FELIX, CAMBRIDGE
HOUSE OF COMMONS LONDON
HOUSE OF LORDS, LONDON
HOUSE OF TOWNEND, MELTON
HSBC MERCHANT SERVICES LLP, LEICESTER
HUDDERSFIELD CENTRAL LODGE, HUDDERSFIELD
HUFFKINS TEA ROOMS, BURFORD
HUNDRED HOUSE HOTEL, TELFORD
HUNTSMAN, DINAS POWYS
HYATT REGENCY LONDON THE CHURCHILL, LONDON
HYDRO HOTEL, EASTBOURNE
IKHYA ENTERPRISES, GUILDFORD
IL FORNO, LIVERPOOL
IMPERIAL HOTEL, GREAT YARMOUTH
INDIAN ZING RESTAURANT, LONDON
INTERCONTINENTAL HOTELS GROUP, BUCKINGHAMSHIRE
INTERNATIONAL SCHOOL OF BUSINESS MANAGEMENT, LUCERNE
ISLE OF ERISKA HOTEL, OBAN
ISLE OF MULL HOTEL, ISLE OF MULL
JAVA & JAZZ COFFEE HOUSE, FOREST ROW
JEAKES HOUSE HOTEL, RYE
JERSEY HOSPITALITY ASSOCIATION LTD
JOANNA'S RESTAURANT, LONDON
JOE ALLEN, LONDON
JOHNSONS STALBRIDGE LINEN SERVICES, SHAFTESBURY
JONES LANG LASALLE HOTELS, LONDON
JQ HOTEL, BIRMINGHAM
JUDGES COUNTRY HOUSE HOTEL, YARM
JULIAN'S RESTAURANT, WIRRAL
JULIE'S, LONDON
JUMEIRAH CARLTON TOWER HOTEL, LONDON
K WEST HOTEL & SPA, LONDON
KAI OF MAYFAIR, LONDON
KENT HALL HOTEL LONDON
KING WAH RESTAURANT, WIRRAL
KNAPPGARDEN & SOHO NORTH RESTAURANT, DALARNA, SWEDEN
KNOCKOMIE HOTEL, FORRES
LA BARBE, REIGATE
LA BRASSERIE, LONDON
LA CACHETTE, ELLAND
LA CANTINA, SOUTHAMPTON
LA GAFFE HOTEL, LONDON
LA PIAZZA, EDINBURGH
LA PORTE DES INDES, LONDON
LADY ANNE MIDDLETONS HOTEL, YORK
LAKES HOSPITALITY ASSOCIATION,
LAKESIDE HOTEL, ULVERSTON
LAMONT PRIDMORE, WORKINGTON
LANCASTER LONDON, LONDON
LANCRIGG COUNTRY HOTEL, GRASMERE
LANGAN'S COQ D'OR, LONDON
LANGAR HALL HOTEL, NOTTINGHAM
LANGLEY CASTLE HOTEL, HEXHAM
LANGSTONE CLIFF HOTEL, DAWLISH
LAS IGUANAS BRISTOL
LASSWADE COUNTRY HOUSE HOTEL, LLANWRTYD WELLS
LASTINGHAM GRANGE HOTEL, YORK
LAVIGNA, LONDON
LE CAVEAU, SKIPTON
LE COLOMBIER, LONDON
LE GAVROCHE, LONDON
LE MANOIR AUX QUAT' SAISONS, OXFORD
LE PREMIER COFFEE BAR & RESTAURANT, BURTON-ON-TRENT
LEANDER CLUB, HENLEY-ON-THAMES
LEEDS METROPOLITAN UNIVERSITY,
LEGACY HOTELS, HENLEY-IN-ARDEN
LEMON TREE BISTRO LTD, FRAMLINGHAM
LEON, LLLONDON
LEWISHAM COLLEGE, LONDON
LEXINGTON CATERING, LONDON
LINO'S, WIRRAL
LINTHWAITE HOUSE HOTEL,WINDERMERE
LION HOTEL, CRICCIETH
LIVEBOOKINGS, LONDON
LIVERPOOL RESTAURANT ASSOCIATION
LIVING VENTURES RESTAURANTS LTD, KNUTSFORD
LLANDUDNO HOSPITALITY ASSOCIATION
LOCH FYNE HOTEL & SPA, INVERARAY
LOCH FYNE RESTAURANTS, BURY ST EDMUNDS
LOCH MELFORT HOTEL, OBAN
LODGE HOTELS (LINCOLN), LUCKINGTON
LONDON BRIDGE HOTEL, LONDON
LONDON CARRIAGE WORKS / HOPE STREET HOTEL, LIVERPOOL
LONDON HOTEL SCHOOL, LONDON
LONDON LINEN SUPPLY, SOUTHALL
LONDON METROPOLITAN UNIVERSITY,
LONGVIEW HOTEL, KNUTSFORD
LOS AMIGOS, STOCKPORT
LOSEHILL HOUSE HOTEL, HOPE
LOWRY HOTEL,, MANCHESTER
LUCKNAM PARK HOTEL, CHIPPENHAM
LUC'S BRASSERIE, LONDON
MACDONALD HOTELS, ASCOT
MACINTYRE HUDSON, LONDON
MAEKONG THAI, BROMSGROVE
MAGPIE CAFE, WHITBY
MALMAISON & HOTEL DU VIN HOTELS, LONDON
MAMAS & LEONIES, SHEFFIELD
MANANA RESTAURANT, PWLLHELI
MANDARIN ORIENTAL HYDE PARK, LONDON
MANX HOSPITALITY PARTNERSHIP, ISLE OF MAN
MARAZION HOTEL, MARAZION
MARC LTD, LONDON
MARCHE, BIRMINGHAM
MARCLIFFE AT PITFODELS HOTEL, ABERDEEN
MARLOWS, LEEDS

MARRIOTT INTERNATIONAL, LONDON
MARTINS RESTAURANTS, FAVERSHAM
MASALA WORLD, LONDON
MATRICARDIS BAR & RESTAURANT, HENLEY-IN-ARDEN
MAYBOURNE HOTEL GROUP, LONDON
MCDONALD'S RESTAURANTS, LONDON
MELIA WHITE HOUSE, LONDON
MELITA HOUSE HOTEL, LONDON
MELTONS, YORK
MERLYN COURT HOTEL, LONDON
MESON DON FELIPE, LONDON
METROPOLITAN HOTEL, LONDON
METROPOLITAN RESTAURANTS LTD, LONDON
MIC HOTEL AND CONFERENCE CENTRE, LONDON
MILLENNIUM & COPTHORNE HOTELS, LONDON
MILSOM HOTELS, COLCHESTER
MING COURT, LONDON
MINT HOTEL, LONDON
MITCHELLS & BUTLERS BIRMINGHAM
MOGFORD LTD, OXFORD
MONTAGUE LLOYD, FALKIRK
MORSTON HALL HOTEL, HOLT
MOSIMANNS, LONDON
MOUNT CHARLES CATERING, BELFAST
MOUNT ROYALE HOTEL, YORK
MR CHAN'S RESTAURANT, ST. HELENS
MR CHOW, LONDON
MR THOMAS'S CHOP HOUSE, MANCHESTER
MULLION COVE HOTEL, HELSTON
MUMTAZ RESTAURANT, BRADFORD
MYHOTEL, BLOOMSBURY,
MYHOTEL, BRIGHTON,
NANDOS CHICKENLAND, LONDON
NATIONAL LIBERAL CLUB, LONDON
NAVARRO'S, LONDON
NEDS NOODLE BAR, LONDON
NETHERWOOD HOTEL, GRANGE-OVER-SANDS
NEW ENGLAND HOTEL, LONDON
NEW MAYFLOWER, LONDON
NEW WORLD, LONDON
NEWAY INTERNATIONAL, LONDON
NEWBY BRIDGE HOTEL,
NINCOMSOUP, LONDON
NO. 13 BOW STREET, FISHBURN
NORTH WALES TOURISM, COLWYN BAY
NORTHCOTE, BLACKBURN
NORTHERN HOTEL, BEXHILL-ON-SEA
NORTHERN IRELAND HOTELS FEDERATION
NORTHERN LAKES ACCOMMODATION PROVIDERS, COCKERMOUTH
NORWICH CITY COLLEGE OF FURTHER AND HIGHER EDUCATION
NOURA BRASSERIE & RESTAURANT, LONDON
NUMBER 10 EDINBURGH, EDINBURGH
NUNZIO'S, BLACKPOOL
NUOVI SAPORI, LONDON
OATLANDS PARK HOTEL, WEYBRIDGE
OBAN HOTEL & SPA, OBAN
OCEAN HOTEL, SANDOWN
OCEAN LOUNGE, SOUTH SHIELDS
OCKENDEN MANOR HOTEL, HAYWARDS HEATH
OCS GROUP UK, CRAWLEY
O'ESTE, ORMSKIRK
OLD BRIDGE HOTEL, HUNTINGDON
OLD COURSE HOTEL, ST ANDREWS
OLD PLOW BISTRO, PRINCES RISBOROUGH
OLD QUAY HOUSE HOTEL, FOWEY
OLDE SHIP HOTEL, SEAHOUSES
OLIVE CATERING SERVICES LTD, RATCLIFFE CULEY
OLIVE TREE RESTAURANT, SOUTHAMPTON
ONE ALDWYCH, LONDON
ONE GREAT GEORGE STREET, LONDON
ORIENTAL CLUB, LONDON
OTUS & CO, LONDON
OXFORD & CAMBRIDGE CLUB, LONDON
OXFORD BROOKES UNIVERSITY
OXFORD HOTELS & INNS MANAGEMENT, DARTFORD
PADDINGTON BUSINESS IMPROVEMENT DISTRICT, LONDON
PARAMOUNT RESTAURANTS, LONDON
PARIS HOUSE RESTAURANT, WOBURN
PARK HOTEL, DISS
PARK HOUSE HOTEL, SANDRINGHAM
PARK PLAZA COUNTY HALL, LONDON
PARKLANDS HOTEL, MARLBOROUGH
PARKWOOD HOTEL, LONDON
PARTNERS IN PURCHASING, LONDON
PATCHAREE THAI RESTAURANT, KINGSTON-UPON-THAMES
PATTERSONS, LONDON
PEEL HOTELS, LONDON
PEKING GARDEN BRAHALL, STOCKPORT
PEKING GARDENS, SUTTON COLDFIELD
PEMBROKESHIRE TOURISM,
PENKERRIS HOTEL, ST AGNES
PENMAENNUCHAF HALL HOTEL, DOLGELLAU
PENNY BLACK, ALNWICK
PEN-Y-DYFFRYN COUNTY HOTEL, OSWESTRY
PEN-Y-GWRYD HOTEL, CAERNARFON
PEPE SALE, READING
PETIT PARIS, NOTTINGHAM
PILGRIM HALL HOTEL & CONFERENCE CENTRE, UCKFIELD
PINES HOTEL & HAWORTHS RESTAURANT, CHORLEY
PIPE OF PORT, SOUTHEND-ON-SEA
PIZZA EXPRESS, LONDON
PLYMOUTH & DISTRICT HOTELS AND RESTAURANTS ASSOCIATION
POISSONNERIE DE L'AVENUE, LONDON
PONSMERE HOTEL, PERRANPORTH
PONTIS GROUP, LONDON
PORTERS ENGLISH RESTAURANT, LONDON
PORTLAND HOTELS, EDINBURGH
PORTMEIRION HOTEL, PENRHYNDEUDRAETH
PORTOBELLO HOTEL, LONDON
POSTILION RESTAURANT, WINDERMERE
PRIDE OF BRITAIN HOTELS, MALMESBURY
PRINCIPAL HAYLEY HOTELS & CONFERENCE VENUES, HARROGATE
PROGRESSIVE TRAINING, ST. ALBANS
QHOTELS, ,LEEDS
QUANTUM LEAP EVENTS, LONDON
QUAYSIDE, IPSWICH
QUEENSBERRY HOTEL, BATH
QUEENSWOOD HOTEL, NORTH SOMERSET
R B ENTERPRISES, LONDON
RA ASSOCIATE, BRIDLINGTON
RADISSON BLU HOTEL, MANCHESTER
RADISSON EDWARDIAN HOTELS, HAYES
RAJ OF INDIA, LONDON
RAMADA JARVIS HOTELS, HIGH WYCOMBE
RANSOMES DOCK RESTAURANT, LONDON
RAVELLO, LONDON
RAVEN HOTEL, MUCH WENLOCK
READS, FAVERSHAM
RED CARNATION HOTELS UK, LONDON
RED HERRING, LOWESTOFT
RED HOUSE HOTEL, MATLOCK
RED LEA HOTEL, SCARBOROUGH
REDBRICK HOUSE, MANSFIELD
REDCLIFFE HOTEL, PAIGNTON
REDCOATS FARMHOUSE HOTEL, HITCHIN
RESTAURANT DEVELOPMENT SERVICES, BETHESDA
RESTAURANT TRISTAN, HORSHAM
RIBBLE VALLEY INNS, MITTON
RICK'S CAFE, LONDON
RISING SUN HOTEL, LYNMOUTH
RIVER HOTEL, OXFORD
RIVERSFORD HOTEL, BIDEFORD
RIVERSIDE HOTEL & LEISURE CLUB, KENDAL
RIVIERA HOTEL, SIDMOUTH
ROADCHEF HOLDINGS, STAFFORD
ROAST, LONDON
ROSE & CROWN HOTEL, BARNARD CASTLE
ROTHAY GARDEN HOTEL, AMBLESIDE
ROTHAY MANOR HOTEL, AMBLESIDE
ROTHERHAM COLLEGE OF ARTS & TECHNOLOGY,
ROWHILL GRANGE HOTEL AND UTOPIA SPA, DARTFORD
ROWLEY'S RESTAURANT, LONDON
ROYAL AIR FORCE CLUB, LONDON
ROYAL AUTOMOBILE CLUB, LONDON
ROYAL CORINTHIAN YACHT CLUB, BURNHAM-ON-CROUCH
ROYAL GARDEN HOTEL, LONDON
ROYAL OAK HOTEL, BETWS Y COED
ROYAL OAK HOTEL, DENNY
ROYAL SPORTSMAN HOTEL, PORTHMADOG
ROYAL YORK & FAULKNER HOTEL, SIDMOUTH
RSM TENON, LONDON
RULES , LONDON
RUSSELLS OF YORK,
RUTLAND INN COMPANY, CLIPSHAM
RYE & DISTRICT HOTELS & CATERERS ASSOCIATION,
SAF RESTAURANT, LONDON
SAINT & CO, CARLISLE
SALLY CLARKES, LONDON
SALVO'S, LEEDS
SAM'S BRASSERIE & BAR, LONDON
SANDAL FARM RESTAURANT, BRADFORD
SANGREELA INDIAN RESTAURANT, NEWCASTLE-UPON-TYNE
SAVOY PARK HOTEL, AYR
SCAFELL HOTEL, KESWICK
SCARBOROUGH HOSPITALITY ASSOCIATION
SCOTLANDS HOTEL & SPA, PITLOCHRY
SELECT SERVICE PARTNER GROUP, LONDON
SEYMOUR HOTELS OF JERSEY
SHAKESPEARE HOTEL, LONDON
SHAMBLES, TEDDINGTON
SHAMPERS, LONDON
SHAW COUNTRY HOTEL, MELKSHAM
SHEARINGS HOLIDAY HOTELS, TORQUAY
SHEFFIELD HALLAM UNIVERSITY
SHERE LTD, GUILDFORD
SHIELD CONSULTANCY SERVICES, MANCHESTER
SHIRE HOTELS, BLACKBURN
SHIREBURN ARMS HOTEL, BLACKBURN
SIAM PARAGON, EAST MOLESEY
SIDMOUTH & DISTRICT HOSPITALITY ASSOCIATION
SIDMOUTH HOTELS, SIDMOUTH
SIENNA RESTAURANT, DORCHESTER
SILVERTSERVICE, DAVENTRY
SIMLA INN TANDOORI RESTAURANT, OLDHAM
SIMPLY SMART GROUP, WESTHAM
SINGAPORE GARDEN RESTAURANT, LONDON
SINGLETON LODGE COUNTRY HOUSE HOTEL, POULTON-LE-FYLDE
SKEGNESS, EAST COAST & WOLDS HOSPITALITY ASSOCIATION
SKETCH (LECTURE ROOM & LIBRARY), LONDON
SLOANE SQUARE HOTEL, LONDON
SMITHS OF SMITHFIELD, LONDON
SODEXO, LONDON
SOFRA, LONDON
SOUS LE NEZ EN VILLE, LEEDS
SOUTH TRAFFORD COLLEGE, ALTRINCHAM
SOUTHPORT HOTELS ASSOCIATION
SPA HOTEL, TUNBRIDGE WELLS
SPAGHETTI HOUSE, LONDON
SPICE VALLEY, BOLTON
ST BRIDE'S HOTEL, SAUNDERSFOOT
ST IVES HOTEL & GUEST HOUSE ASSOCIATION
ST JAMES CLUB, LONDON
ST JAMES'S CLUB, MANCHESTER
ST JOHN BAR & RESTAURANT, LONDON
ST JOHN'S, LONDON
ST MORITZ RESTAURANT, LONDON
ST. PATRICK'S INTERNATIONAL COLLEGE, LONDON
STARBUCKS COFFEE CO, LONDON
STARWOOD HOTELS AND RESORTS, LONDON
STAYING COOL LTD, BIRMINGHAM
STEPHENSON HARWOOD, LONDON
STEYNE HOTELS, WORTHING
STIRRUPS COUNTRY HOTEL, BRACKNELL
STOCK HILL COUNTRY HOUSE HOTEL & RESTAURANT, GILLINGHAM
STOKE LODGE HOTEL, DARTMOUTH
STOW LODGE HOTEL, CHELTENHAM
STOWMARKET CATERING, SAXMUNDHAM
STRATFORD-UPON-AVON COLLEGE,
STUDIO SIX 1992, LONDON
STUDLEY HOTEL, HARROGATE
SUPPORT TRAINING & SERVICES, FARNHAM
SWINTON PARK HOTEL, RIPON
SWISSOTEL LONDON HOWARD, LONDON
TALAD THAI, LONDON
TAMP 'N' SWIRL - A COSTA FRANCHISE, NORTHALLERTON
TAMPOPO , MANCHESTER
TAURUS, MANCHESTER
TENBY HOUSE HOTEL, TENBY
TERROIRS WINE BAR & RESTAURANT, LONDON
TGI FRIDAY'S, LUTON
THAI COTTAGE, BERKHAMSTED
THAI POT, LONDON
THAILAND NO 1, LINCOLN
THAI'S SMILE, BOURNEMOUTH
THAMES VALLEY UNIVERSITY, LONDON
THE ANCIENT RAJ, SWINDON
THE ANGEL HOTEL, ABERGAVENNY
THE ANGEL INN, SKIPTON
THE ARCH RESTAURANT, PUDSEY
THE BEECH TREE INN, CARDIFF
THE BELL INN, PETERBOROUGH
THE BELL INN & HILL HOUSE, STANFORD-LE-HOPE
THE BESPOKE HOTEL COMPANY, BEACONSFIELD
THE BOAT INN, TOWCESTER
THE BRASSERIE ON ST JOHNS STREET, LONDON
THE BULL AUBERGE,EYE
THE BURGER JOINT, BRISTOL
THE CARLTON LODGE HOTEL, YORK
THE CASTLE HOTEL, NEATH
THE CAVENDISH LONDON, LONDON
THE CHAMPANY INN, LINLITHGOW
THE CHESTER GROSVENOR AND SPA, CHESTER
THE CHRISTMAS DECORATORS, LIVERPOOL
THE CLIVE RESTAURANT WITH ROOMS, LUDLOW
THE COMMONWEALTH CLUB, LONDON
THE COPPER HORSE, SCARBOROUGH
THE COTTAGE HOTEL, KINGSBRIDGE
THE COUNTRYMAN, HORSHAM
THE CRAIGLYNNE HOTEL, GRANTOWN-ON-SPEY
THE CROSS HOTEL, INGUSSIE
THE CROWN, COLCHESTER
THE CURRY CORNER, CHELTENHAM
THE DEESIDE INN, BALLATER
THE DINING ROOM, ASHBOURNE
THE DOLPHIN INN, THORPENESS
THE DORCHESTER, LONDON
THE DOYLE COLLECTION, DUBLIN
THE EAST INDIA DEVONSHIRE SPORTS & PUBLIC SCHOOLS, LONDON
THE EVESHAM HOTEL, EVESHAM
THE FAR SYDE, LKLEY
THE FAT DUCK, BRAY
THE FIRST FLOOR CAFE,WINDERMERE
THE FISH PLACE, BEACONSFIELD
THE FRENCH CONNECTION BISTRO, STOURBRIDGE
THE FRENCH TABLE, SURBITON
THE GEORGE HOTEL, HATHERSAGE
THE GEORGE AND DRAGON, PENRITH
THE GEORGIAN HOUSE, LONDON
THE GLASSHOUSE, RICHMOND
THE GLENCOE HOTEL, GLENCOE
THE GODSTONE HOTEL, GODSTONE
THE GORING HOTEL, LONDON
THE GRANBY INN, MORPETH
THE GREYHOUND INN, STOCKBRIDGE
THE GROUCHO CLUB, LONDON
THE HALCYON, BATH
THE HONOURABLE SOCIETY OF LINCOLN'S INN, LONDON
THE HORSE SHOE INN, PEEBLES
THE HOSTE ARMS HOTEL, BURNHAM MARKET
THE HOTEL AND EXTREME ACADEMY, ST. COLUMB
THE HOXTON, LONDON
THE INN AT WOBURN, MILTON KEYNES
THE KENSINGTON WINE ROOMS, LONDON
THE LANDMARK GROUP, LONDON
THE LANGHAM LONDON, LONDON
THE LANSDOWNE CLUB, LONDON
THE LAST WINE BAR, NORWICH
THE LIGHTHOUSE, WINDERMERE
THE LIGHTHOUSE, ALDEBURGH
THE LIME LEAF, BASINGSTOKE
THE LIME TREE, MANCHESTER
THE LINCOLN CENTRE, LONDON
THE LITTLE YANG SING, MANCHESTER
THE MANDEVILLE HOTEL, LONDON
THE MANOR HOTEL, WEST BEXINGTON
THE MERCURY, BOLTON
THE MONTCALM HOTEL, LONDON
THE MULBERRY TREE, BOUGHTON MONCHELSEA
THE NARE, TRURO
THE NEW INN, RHYL
THE NEW MILL, EVERSLEY
THE NORTHERN QUARTER RESTAURANT & BAR, MANCHESTER
THE OAKHOUSE HOTEL, AXBRIDGE
THE OLD KINGS ARMS HOTEL, PEMBROKE
THE OLD RECTORY, BROSELEY
THE OLD VICARAGE HOTEL, AMBLESIDE
THE OXO TOWER RESTAURANT, LONDON
THE PEACOCK AT ROWSLEY
THE PEARTREE AT PURTON, SWINDON
THE PENN CLUB, LONDON
THE PEPPERPOT, CROMER
THE PIPE & GLASS INN, BEVERLEY
THE PLOUGH AT CLANFIELD, BAMPTON
THE PLOUGH INN, HOPE VALLEY
THE POLASH RESTAURANT, SOUTHEND-ON-SEA
THE RITZ HOTEL, LONDON
THE RITZ HOTEL RESTAURANT, LONDON
THE ROBERT GORDON UNIVERSITY, ABERDEEN
THE ROYAL VICTORIA HOTEL, NEWPORT
THE SAVOY HOTEL, LONDON
THE SEAFOOD RESTAURANT, PADSTOW
THE SHALIMAR, OLDHAM
THE SLOANE CLUB, LONDON
THE SQUARE, LONDON
THE STABLEYARD, WREXHAM
THE STAFFORD HOTEL, LONDON
THE SWAN AT STREATLEY, READING
THE THIRD CROSSING, LOWESTOFT
THE TOURISM BUSINESS, YORK
THE TRAVELLERS CLUB, LONDON
THE VENUE, CLEVELEYS
THE VICTORIA, LONDON
THE VINE RESTAURANT LTD, SEVENOAKS
THE VINEYARD AT STOCKCROSS, NEWBURY
THE WATERSIDE INN, BRAY
THE WENTBRIDGE HOUSE HOTEL, PONTEFRACT
THE WHITE HOUSE HOTEL, NOTTINGHAM
THE WOODHOUSE HOTEL, LARGS
THE WORDSWORTH HOTEL & SPA, GRASMERE
THE ZETTER, LONDON
THIRD FORCE, UXBRIDGE
THOMAS RIDLEY FOODSERVICE, BURY ST EDMUNDS
THORPENESS HOTEL AND ALDEBURGH HOTELS LTD, ALDEBURGH
THREE ACRES INN, HUDDERSFIELD
THREE COUNTIES HOTEL, HEREFORD
THREE HORSESHOES INN, LEEK
THREE LIONS, FORDINGBRIDGE
THURLESTONE HOTEL, KINGSBRIDGE
TICKTON GRANGE HOTEL, BEVERLEY
TIDES REACH HOTEL, SALCOMBE
TILLMOUTH PARK HOTEL, CORNHILL-ON-TWEED
TINY TIM'S TEAROOM , CANTEBURY
TONGUE HOTEL, LAIRG
TOR DOWN GUEST HOUSE, GLASTONBURY
TORQUAY LEISURE HOTELS, TORQUAY
TOWER RESTAURANT, ALNWICK
TOWN & COUNTRY LODGE, BRISTOL
TOWN HOUSE COLLECTION, EDINBURGH
TRAGUS HOLDINGS, LONDON
TREFEDDIAN HOTEL, ABERDOVEY
TREGLOS HOTEL, PADSTOW
TRICON FOODSERVICE CONSULTANTS, BARKING
TRUFFLES, LEEDS
TRUNKWELL MANSION HOUSE, READING
TUFTON ARMS HOTEL, APPLEBY-IN-WESTMORLAND
TURPIN SMALE FOODSERVICE CONSULTANCY, LONDON
TWELVE, THORNTON-CLEVELEYS
TYNEDALE HOTEL, LLANDUDNO
UBIQUITOUS CHIP, GLASGOW
UNILEVER BESTFOODS, LEATHERHEAD
UNION JACK CLUB, LONDON
UNIVERSITY COLLEGE BIRMINGHAM
UNIVERSITY COLLEGE FALMOUTH,
UNIVERSITY OF BRIGHTON, EASTBOURNE
UNIVERSITY OF HUDDERSFIELD
UNIVERSITY OF NORTHUMBRIA, NEWCASTLE- UPON-TYNE
UNIVERSITY OF PORTSMOUTH,
UNIVERSITY OF SURREY,
UNIVERSITY OF ULSTER,
UNIVERSITY OF WALES INSTITUTE, CARDIFF
UNIVERSITY WOMEN'S CLUB, LONDON
V8 GOURMET GROUP, LONDON
VACHERIN, LONDON
VEGAS HOTEL, LONDON
VENNELLS RESTAURANT, RIPON
VENNERS LTD, HARLOW
VERZONS COUNTRY HOUSE HOTEL, LEDBURY
VICTORIA HOTEL, BAMBURGH
VICTORIA PARK PLAZA, LONDON
VINOTECA LTD, LONDON
VRISAKI, LONDON
W SHIPSEY & SONS LTD, SALISBURY
WAGAMAMA BELFAST
WAGAMAMA, LONDON
WALNUT TREE HOTEL, BRIDGWATER
WASCO, BALA
WATEREDGE INN, AMBLESIDE
WENTWORTH CLUB, VIRGINIA WATER
WENTWORTH HOTEL, ALDEBURGH
WEST 10 WINE BAR, SHEFFIELD
WEST LODGE PARK, BARNET
WESTFIELD HALL HOTEL, SOUTHSEA
WESTMINSTER KINGSWAY COLLEGE, LONDON
WESTMORLAND LIMITED, PENRITH
WESTON MANOR HOTEL, BICESTER
WESTON PARK ENTERPRISES, SHIFNAL
WESTWOOD COUNTRY HOTEL, OXFORD
WETHERBY WHALER GROUP, WETHERBY
WETHERBY WHALER, WAKEFIELD
WHITBREAD, LONDON
WHITE SWAN HOTEL, PICKERING
WHITTLEBURY HALL HOTEL & SPA, TOWCESTER
WILLIAM MURRAY PR, CROYDON
WILLINGTON HALL HOTEL,TARPORLEY
WILLOWBANK HOTEL, LARGS
WILLOWFIELD HOTEL, CARNFORTH
WILTONS, LONDON
WINDSOR HOUSE HOTEL, LONDON
WINTER RULE, CHARTERED ACCOUNTANTS, TRURO,
WINTERINGHAM FIELDS, SCUNTHORPE
WITCHERY BY THE CASTLE, EDINBURGH
WOLFSCASTLE COUNTRY HOTEL, PEMBROKESHIRE
WORK PERMIT EXPERTS, LONDON
WORLD MEDIA PUBLISHING, REDHILL
WORSLEY ARMS, YORK
WYNDHAM GRAND, LONDON
YANG SING, MANCHESTER
YO YO CAFE BAR, BRADFORD
YO! SUSHI, LONDON
YORKSTON GUEST HOUSE, ST ANDREWS
YOUNG CHENG, LONDON
YUET BEN RESTAURANT, LIVERPOOL
ZECCA, MORPETH

BRITISH HOSPITALITY Association

Queens House, 55/56 Lincoln's Inn Fields, London WC2A 3BH
Tel: 020 7404 7744 Fax: 020 7404 7799 Email: bha@bha.org.uk www.bha.org.uk

Designed by Creative Heads Ltd (www.creative-heads.co.uk)