Food Service Management
Market Report 2016

Sponsored by Bidvest Foodservice
The British Hospitality Association

The British Hospitality Association is the authority on hospitality and tourism in the UK. We represent 45,000 businesses and we work with government to deliver three goals:

- competitive advantage for our country
- sustainable growth for our industry
- valuable new jobs for our people

Definitions used in this report

This Market Report tracks and analyses performance and trends in the UK Food Service Management Sector. Findings are based on an annual survey, conducted each year since 1990, amongst major companies operating in the sector. The economic impact analysis referenced in this report is based on British Hospitality Association and Oxford Economics research*, and applies 2014 ONS SIC 2 data (covering 56-Food and Beverage Service activities).

* The range of data sources for the Oxford Economics Study is listed in section 1.4, page 4, of that document. The FSM sector has been defined using the set of 2007 Standard Industrial Classification.

While we have made every attempt to ensure the accuracy and reliability of the information contained in this report, we are not responsible for any errors or omissions or for results obtained from the use of this information. Any reliance placed on the content is therefore at the reader’s own risk.

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Food service activities

This class includes industrial catering, i.e. the provision of food services based on contractual arrangements with the customer, for a specific period of time. Also included is the operation of food concessions at sports and similar facilities. The food is usually prepared in a central unit.

This class includes:

- activities of food service contractors (e.g. for transportation companies)
- operation of food concessions at sports and similar facilities
- operation of canteens or cafeterias (e.g. for factories, offices, hospitals or schools) on a concession basis

Event catering activities

This class includes the provision of food services based on contractual arrangements with the customer at the location specified by the customer, for a specific event.

In house catering

This class includes catering in sectors outside the core hospitality industry (estimates using occupational data).

Temporary employment (estimate)

This class includes the activities of supplying workers to clients’ businesses for limited periods of time to temporarily replace or supplement the workforce of the client, where the individuals provided are employees of the temporary help service unit.
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The FSM sector’s leading report – Participating Companies

The British Hospitality Association would like to thank all the food service management businesses that have contributed to the analysis in this report. We greatly appreciate the time invested in responding to our comprehensive annual Food Service Management (FSM) Survey. We also express our sincere thanks to the economists and analysts involved.

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Introduction

The hospitality industry is crucial to the UK economy. It generates 2.9 million jobs and is the UK’s fourth largest employer. The food service management sector alone directly employs over 902,000 people across the UK, accounting for 31% of the entire hospitality workforce.

Such an important industry needs and deserves the support of Government in both economic and policy terms. Britain’s exit from the European Union is predicted to have wide ranging implications for our industry, but it also provides an opportunity for the UK Government to prioritise hospitality and food service management, in order to maximise the economic and social benefits of our industry. Hospitality and food service are poised to help achieve the Government’s ambition to redistribute wealth and rebalance the economy.

This year’s annual survey of the UK’s leading food service management (FSM) businesses coincided with the EU referendum at end June. Consequently, survey responses captured immediate business reactions to the referendum result. Most of these reactions underlined concern over restricted access to the EU labour market. However, given that the development of a Brexit strategy and negotiations with the EU may take several years, survey responses do not reflect considered business views of the implications of possible trade agreements, tariffs or the regulatory implications of Brexit.

The FSM sector has shown continued growth for the last three years, ensuring a workforce supply which facilitates this growth is crucial. The BHA are calling for government support to help address challenges posed by Brexit, and ensure that the food service management sector can continue to grow, create jobs, boost exports and compete effectively at an international level. The Food Service Management Forum will guide the BHA’s advocacy of the industry and inform the association’s dialogue with Government. The Food Service Management Survey will play a critical role in shaping the BHA’s strategic advisory work, and provides valuable insights on current and future trends in the FSM sector.

We are delighted to present the findings of the 2016 FSM Survey, the latest in our series of sector-specific reports. The results affirm the sector’s continued success – as employers, and in terms of its commercial, environmental and community-focused activities.
Continuing last year’s trend of growth, businesses reported that net revenues increased between the period of 2014 and 2015. According to this year’s report, all responding companies expect to see the market further expand over the next few years and nearly a third envisage their turnover growing by 20 per cent or more.

The FSM sector remains dynamic with this report highlighting that change is a constant feature. Demand for ‘flexible service times’ are expected to increase in the coming year with the traditional lunch hour becoming a thing of the past. Respondents forecast higher demand for ‘have it your way’ meals tailored to the customers’ liking.

Results illustrate that the greater application of technology will continue unabated. This will cover apps and contactless payments, and will increasingly encompass the provision of information and data to customers with which they can make informed choices (new digital initiatives are highlighted on page 9). Also for the first time, we have seen that ‘own branded’ products exceeded the number of franchised or high street brands in the offerings from FSM companies, illustrating the contribution of ‘own brands’ to FSM revenue growth.

All respondents were passionate about the attractive careers offered in the FSM sector. The number of applications per position grew in 2015 over 2014 with respondents anticipating that they would take on 24,000 new staff in 2016. This is in addition to the 8,000 apprenticeships running in respondent FSM businesses.

The sector also continues to lead in the area of responsible hospitality, in particular in promoting the health and wellbeing of customers. Businesses have made considerable investments in reducing salt, sugar and fat, as well as increasing the vegetable content in dishes to offer customers more ‘healthy options’. Similarly, businesses demonstrated strong leadership in adopting best practice in food safety, and supported BHA’s development of the new Industry Guide to Good Hygiene Practice: Catering 2016, which is recognised by both the Food Standards Agency and Food Standards Scotland.
FSM businesses have enjoyed continued growth over the past three years. For those reporting in this year’s survey, 81% of businesses saw their net revenues increase between 2014 and 2015.

For each organisation operating in the sector, organic growth remains important:

- 94% of businesses expect to grow market share by capturing demand from their competitors
- 52% expect to achieve business growth in new market sectors
- 18% expect increased consumption
- 49% expect continued acquisition and consolidation activity

Expansion into event catering

One source of growth in recent years has been the expansion of business from fixed site contracts into event catering. This continued in 2015 with services now being offered by 29% of respondents.

Companies marketing and selling services as an event caterer

- 25% in 2014
- 29% in 2015
Top Trends in the last three years

The top two trends reported in the FSM sector remain consistent with those recorded last year.

The growth of ‘Street Food’ shows no sign of abating; it remains the number one trend and the availability of ‘Healthy Options’ and better nutritional choices remains second place.

Beyond this, there is no clear consensus regarding the next big single market trend. Some respondents feel that operational issues – technology, contactless payments and service offers such as integrated contracts – were the most significant. Others saw customer-facing products as key, with customer led offers and in house branding continuing to be the most important.

What are the top 3 trends you have seen in the last 3 years in the contract catering industry?

No 2 Healthy Food
No 1 Street Food
No 3

• In house brands
• Consumer led offers
• Integrated Contracts
• Technology/ contactless
• Casual Dining

“At Bidvest Foodservice, we’ve certainly seen a similar pattern in food service trends over the last couple of years, and predict street food and healthy options will continue to be dominant. For us however, these trends are inextricably linked to both wider consumer and cuisine trends. The types of street food formats and the way people are viewing and managing healthy options are ever changing. Sugar is certainly high on everyone’s agenda at the moment, but so is protein, free from and so called ‘performance foods’ – it isn’t just enough for food to fill you up nowadays! Our insights team are dedicated to continually seeking out the latest trends and patterns in consumers’ eating out behaviour, and we pride ourselves on offering the most relevant, and forward thinking, products, recipes and services.”

Andrew Selley, Chief Executive, Bidvest Foodservice
The digital trends and technology available to the hospitality sector is developing rapidly, and the rise of industry specific niche apps, managed food delivery services and new payment solutions are changing consumer habits and expectations.

Observations

New payment solutions, such as Apple Pay, are exciting and offering a faster and more convenient way of settling bills. In-app payment solutions are becoming increasingly popular; however, from our observations it only accounted to 1%-3% of transactions processed by customers using these apps in the last year. We predict these figures will increase as added features such as bill-splitting, marketing and loyalty rewards are becoming more and more important in retaining customers.

Managed food delivery services such as Deliveroo, Jinn, Quickup and UberEats have had a huge impact on the restaurant sector. Takeaway sales have increased by 54% on average, accounting for up to 25% of some customer’s total sales.

Restaurants using Customer Loyalty Schemes are seeing a better retention in customers and increased sales; statistics from our loyalty app partner, Como, suggest that customers registered to a loyalty scheme spend around 25% more and have an increased promotion redemption ratio.

Three Key Predictions

1. With increased staffing costs, recruitment shortages and customers seeking quality with value for money; more quick service restaurants will be implementing self-service kiosks, online and in-app ordering.
2. Advancements in data sciences and digital trends mean that data analysis will become even more important in empowering business intelligence through technology.
3. The Internet of Things will find its way to the commercial market in the next few years; industry standard equipment like cookers, dishwashers and fridges will have embedded sensors controlled over the cloud that can alert the business when due for servicing or is faulty.

Written by BHA partner 3S POS
Acoura: Trend for comprehensive supplier management systems set to continue.

Over the last year, we’ve seen a huge increase in customers implementing comprehensive supplier management systems and believe it’s a trend that’s set to become the norm rather than the exception as hospitality providers seek to meet growing consumer demands.

Once a simple tick box system, supplier management has come a long way over the last few years. Partly as a response to public outcry over the horsemeat saga and partly due to growing legislative demands, today we find that pubs, restaurants and hotels are looking for details on everything from allergens and product providence to food safety certificates from online platforms able to discern every supplier detail and trend 24/7 on any device.

Businesses which have clear sight of their supply base are the best prepared to react to a complaint or crisis. For example, one of the providers we work with managed to remove their whole stock of a contaminated product across its 1,000 premises within an hour because they were using an effective online supplier management platform. Traced from the complaint site back to source with ease, allowed the operator chain to protect its customers across the country while providing the supplier themselves with an early warning about its product.

While all this is hugely positive from a hospitality provider’s perspective, suppliers have also benefited through more regular contact with their customers. This improved communication has led to more structured interactions and given many the chance to showcase their own commitment to food safety and product quality.

Written by BHA partner Acoura
Predictions for the next big trends in the hospitality industry

Millennials’ eating habits, more flexible eating times, greater use of technology and more inventive use of space all feature strongly in the predictions for the next big trends.

Flexible service times and a cafe culture are expected to increase with the traditional ‘lunch hour’ becoming a thing of the past and with clients, ‘grazing all day’. Companies are expecting more demand for ‘have it your way’ meals tailored to the customer’s liking, with some companies even anticipating more customers requesting ingredients to make recipes at home.

Healthy choices remains important. Increased government policies related to obesity and sugar, are expected to influence customer demand for lower sugar levels in products and more ‘sugar free’ alternatives. There is already an emphasis on allergens and intolerances and now there is also an increasing desire for superfoods, raw foods and foods tailored to particular diets. More meat-free eating is also a strong and consistent theme.

The greater use of technology is an unstoppable trend that will not only cover apps and contactless payment but will increasingly encompass the provision of information and data to customers to inform their choices.

Brands grow as a driver of growth

In this survey, 9 out of 10 FSM businesses reported that they had defined brands and concepts across many of their sites. In these sites, 100% of surveyed companies reported that they now offered food packaged under their own branding. Most of these were also strongly increasing the number of ‘own brand’ lines on site.

For the first time, own branded products exceeded the percentage and number of franchised or high street brands in responding companies’ offerings.

Not surprisingly therefore, nearly one-third of FSM companies see branded business as an important factor for the success of their business performance in the coming year.

More meat-free eating

More customers requesting ingredients to make recipes at home

Healthy eating linked to diets/allergens/intolerances

Greater use of technology and data to customers

Demand for “have it your way” – meals

Flexible service times and cafe culture

Encourage greater use for informal meetings

Shared space between caterers and retailers

International streetfood

Vegan Raw Dishes

Authentic global flavours/styles

Sugar reduction

Artisan Coffee

BHA Food Service Management Report 2016
Continued business growth anticipated

According to this year’s survey, all responding companies expect to see their revenues increase over the next few years and nearly a third expect their turnover to increase by 20% or more.

“
When this survey was completed the economic recovery and business growth forecasts seemed to be on track and the mood was optimistic. However, Brexit threw a spanner in the works. It’s probably still too early to say how this will affect the fortunes of our clients, on which we are largely dependent. However, what it does mean is that growth predictions made back in Q1 may now have to be tempered somewhat until the full impact of Brexit has played out.”

Ruston Toms, Sales Director & Co-Founder, Blue Apple Contract Catering

Key factors influencing the anticipated growth of FSM businesses are well understood

Economic conditions, immigration policies restricting access to the EU labour market and the impact of the National Living Wage are seen as the main risks to successful performance next year. Technology is seen as the strongest factor, alongside brand, for achieving planned growth in the future.

What are the top three factors you think will influence the performance of your business in the next year?

<table>
<thead>
<tr>
<th>Factor</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
<td>64%</td>
</tr>
<tr>
<td>Economic conditions</td>
<td>53%</td>
</tr>
<tr>
<td>Staff recruitment</td>
<td>47%</td>
</tr>
<tr>
<td>National Minimum Wage/National Living Wage</td>
<td>47%</td>
</tr>
<tr>
<td>Competition</td>
<td>35%</td>
</tr>
<tr>
<td>Branded business</td>
<td>29%</td>
</tr>
<tr>
<td>Staff skills</td>
<td>12%</td>
</tr>
<tr>
<td>Costs</td>
<td>12%</td>
</tr>
<tr>
<td>Product development</td>
<td>0%</td>
</tr>
</tbody>
</table>
Where will new business come from?

All respondents anticipate growth, the majority by over 20%. Nearly all respondents reported an ambition to acquire business from their competitors, although it is expected that these 94% of businesses will not all achieve growth by taking market share from each other. It was positive therefore that over 70% were targeting growth by developing new market sectors and capitalising on many of the trends reported in this report to increase consumption from their end consumers.

Technology

Technology was the most frequently mentioned factor contributing to enhanced performance of FSM businesses in the next three years.

Loyalty schemes, customer database management, mobile payment and social media were felt to be topmost in attracting customers. E-learning was an established technology for staff training.

The two main areas which were anticipated to benefit businesses in the future were the extension of apps and online registration. Booking with EPOS and contract management software were also mentioned by a small number of those replying as being of increasing impact in the future.

“The rapid development of digital and technological innovation will be transformational in the hospitality world over the coming years. Great food and service will always be a core requirement, but the way it is delivered, paid for, made available and accessed will change markedly.”

Catherine Roe, CEO, Elior
The aspects of technology that have had and will have the most impact

<table>
<thead>
<tr>
<th>Technology</th>
<th>Have had</th>
<th>Could have in future</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-learning for staff</td>
<td>100</td>
<td>85</td>
</tr>
<tr>
<td>Mobile payment</td>
<td>85</td>
<td>85</td>
</tr>
<tr>
<td>Social media</td>
<td>85</td>
<td>62</td>
</tr>
<tr>
<td>Loyalty cards / schemes</td>
<td>62</td>
<td>37</td>
</tr>
<tr>
<td>Apps</td>
<td>62</td>
<td>38</td>
</tr>
<tr>
<td>Customer database management</td>
<td>50</td>
<td>38</td>
</tr>
<tr>
<td>On-line registration / booking</td>
<td>62</td>
<td>8</td>
</tr>
</tbody>
</table>

Business is growing and ambition remains strong

Catering Hygiene Guide App

The Industry Guide to Good Hygiene Practice: Catering 2016, was launched in July 2016 and is the first update to the guidelines for 20 years. The guide was put together by a team of food safety and risk experts from British Hospitality Association member businesses and has been recognised by the Food Standards Agency, Food Standards Scotland, and assured by the BHA’s Primary Authority, Cornwall Council.

The Guide has been updated to give practical advice to caterers on how to comply with their legal obligations to ensure the safety of the food served to their customers. The guide consolidates advice into a one-stop document and is a must-have for every catering business. It is available to purchase in hard copy, online, and as an App.

Cross-Contamination Training Game

Funded by the University for Industry and in partnership with the Serious Games Development Studio, the BHA has developed its first games-based learning programme.

Our first game - Safer Food Series #1 Burgers - focuses on cross contamination. Staff can use the game on any mobile or tablet device, to learn the process of setting up a hygienic work area, manage deliveries and make burgers as orders come in. The game is an ideal tool for new entrants to the workplace, and a fun way to refresh cross contamination know-how for current kitchen staff.

According to experts, some two-thirds of hospitality businesses face barriers to accessing staff training. Games-based training may be ideal for engaging our workforce - 40% of whom are under 30 years of age - and to offer resource poor SMEs a valuable means to upskilling their workforce.

If successful, the pilot will go a long way to encouraging the University for Industry and Serious Games Development Studio to fund several new training games, supporting our ambition to deliver the world’s first pan-industry games-based training programme. This transformational facility could offer our SME members access to a burden-free training tool for their teams.
Government support and the impact of key policies

Confidence in government support declines

The survey of FSM companies closed soon after the 2016 referendum. With much uncertainty regarding the impact of the referendum decision for Brexit, it is not surprising that confidence in government support for the sector declined: Those confident in government support slips from 25% to 23%. Those not confident at all goes up from 25% to 30%.

How confident are you that the current government will support the hospitality industry?

- Confident: 23%
- Neutral: 47%
- Unconfident: 30%

What are the main changes that the government could make that would directly help your business succeed?

- Review and consult with businesses on National Living Wage: 100%
- Cut tourism VAT: 75%
- Reduce red tape in general: 50%
- Increase apprenticeships: 50%
- Support local food and ensure British produce is competitive and sustainable: 33%
- Put measures in place to reduce London traffic: 33%
- Provide free school meals to all children: 17%
- Increase recycling: 17%
This year the sector has enjoyed a strong trend in attracting more talent with applications for positions rising, anticipated hires predicted for next year standing at 24,000 and with over 8,000 apprentices currently working in respondents’ businesses. The sector has a constant need to attract more talent and is proving to do so.

Issues concerning the National Living Wage and restrictions to access to the EU labour market are going to be critical to the growth of businesses in the aftermath of Brexit. BHA and the sector will continue to work with the Department for Work & Pensions, Jobcentre Plus, the National Apprenticeship Service, Springboard and others, to promote hospitality careers and aid businesses in recruiting staff.

The sector employs 902,000

Job applications per position 2015 vs 2014

Comparing this year’s applications with last year’s results, there has overall been a net increase in the application rate per position. This reflects the strong appeal offered by the industry and potentially an increased appreciation of the great career prospects.

The number of applicants for each vacant position in 2015 vs 2014

Total FSM employment

FSM Employee numbers since 2010
BHA Employment Campaigns

The Big Hospitality Conversation... inspiring the next generation

The Big Hospitality Conversation (BHC) is a hugely successful campaign bringing industry leaders together with young jobseekers. The BHC aims to inspire jobseekers to join the industry, and to encourage businesses to offer meaningful career starts for young people.

Since its inception, there have been over 42 events across the UK, connecting over 4,000 hospitality Chief Executives and HR Directors with over 6,000 young jobseekers.

The campaign has surpassed its target of 60,000 hospitality career opportunities for under 25 year olds by 2016, to achieve an outstanding result of 67,000 pledges of new jobs, apprenticeships and structured work placements.

Hospitality Works

Hospitality Works is a nationwide month-long campaign led by the BHA in collaboration with Department for Work & Pensions.

The campaign engages Jobcentre Plus staff and claimants, with the aim to promote opportunities in the industry to suitable jobseekers, and upskill and educate Jobcentre Plus staff.

Last year the campaign saw over 85,000 activities take place across the UK in January, including visits to employer establishments, hospitality careers fairs, work experiences, educational sessions for staff and online webinars.

The 2017 campaign will launch on February 14th, and we will once more be calling leading industry participation in the initiative.

Apprentices

8,000

Over 8,000 apprentices currently work in the companies surveyed.

New Jobs

24,000

Companies expect to make between more than 24,000 new hires in the next year.
Annual staff turnover

Staff turnover rates have contracted. In 2014, 46% of all companies had staff turnover rates above 21%, in 2015, only 38% of companies reported this churn rate. Encouragingly, more companies were in the lower 10% turnover range year on year.

What is your annual staff turnover?

<table>
<thead>
<tr>
<th>Turnover</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-10%</td>
<td>31%</td>
<td>23%</td>
</tr>
<tr>
<td>11-20%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>21%</td>
<td>38%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Whilst there may be some indication that the sector is attracting more talent, it is still a challenge because the talent pool is decreasing, especially at a higher level. We are also competing vigorously with other sectors, such as high street retailers and the care industry, for front line staff and most are upping their game as employers, so competition between industries is getting stronger too – we all want the same people.

As a sector, we need to constantly promote the benefits of food service as a career – such as better working hours, great promotional prospects, and competitive salaries. We offer great career opportunities at very competitive salaries and apprenticeships continue to offer a great route into food service.

Alison Gilbert, Group HR Director, CH&Co Group

Women in Leadership

At the end of 2015 a review of Lord Davies’ 2011 report Women on Boards, found that women now hold 26% of FTSE100 board positions, exceeding the original target of 25% by 2015.

The food service sector reports that 28% of their board members are women, positioning the food service management sector as a leader on gender diversity. 82% of member companies have female board members and 35% of senior leadership roles in FSM member companies are held by women.

With the Lord Davies’ review increasing the five-year target for women in FTSE100 board position from 25% to 33%, this year’s numbers show that the FSM sector is in a strong position to continue setting best practice.
Gender Pay Gap Reporting

Benefits provided to staff

The main benefits offered to staff include healthcare, childcare, free or discounted meals and travel schemes and are shown here. This year life assurance has been mentioned as a benefit by about a third of companies linked to new pension requirements.

What benefits do you provide to your management and employees?

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Employees</th>
<th>Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare</td>
<td>14%</td>
<td>100%</td>
</tr>
<tr>
<td>Childcare related</td>
<td>100%</td>
<td>92%</td>
</tr>
<tr>
<td>Travel allowance/car</td>
<td>36%</td>
<td>100%</td>
</tr>
<tr>
<td>Free meals</td>
<td>100%</td>
<td>71%</td>
</tr>
<tr>
<td>Discounted meals</td>
<td>67%</td>
<td>100%</td>
</tr>
<tr>
<td>Cycle schemes</td>
<td>100%</td>
<td>80%</td>
</tr>
<tr>
<td>Special training</td>
<td>80%</td>
<td>100%</td>
</tr>
<tr>
<td>Discounted purchases</td>
<td>89%</td>
<td>89%</td>
</tr>
<tr>
<td>Annual leave purchase</td>
<td>67%</td>
<td>100%</td>
</tr>
<tr>
<td>Secondments around the business</td>
<td>82%</td>
<td>100%</td>
</tr>
</tbody>
</table>

What is the gender pay gap?

The gender pay gap is defined as the relative difference in the average gross hourly earnings between women and men. Proposals announced by the government and set out in the draft Equality Act 2010 (Gender Pay Gap Information) Regulations 2016, will mean that organisations with at least 250 employees will be under a duty to report on any gender pay gaps within their business.

A ‘snapshot’ of employees’ pay will be taken on a specified date and the report must be published the next calendar year and annually thereafter. These reporting dates will be set by the legislation introducing gender pay reporting. As yet, the draft Regulations are yet to be finalised. Initially, they were due to be passed this October; however, there is a current proposed date of April 2017.

What does this mean for my business?

The Regulations will likely have a burdensome impact on organisations with complex pay structures and large workforces as they will need to allocate time and resources to data collection. It is then important to consider the results of the calculations and compare these with other businesses within the sector. Organisations are advised to begin the process now in order to avoid potential problems later.

For organisations with a significant gender pay gap, the public relations effect could be detrimental and open organisations up to potential discrimination and equal pay claims. Whilst the gender pay gap is not the same as equal pay, it may raise equal pay issues that organisations will now have time to deal with before the reporting date.

Written by BHA partner Boyes Turner
This year’s survey confirms that FSM businesses are increasingly seeing sustainability as imperative for their business.

The hospitality industry has continued to proactively support government initiatives and voluntarily lead on sustainable sourcing, health and wellbeing programmes, as well as caring for the environment around them.

“With rising obesity, the preparation of healthy meals has become critical. FSM businesses have been working hard to provide healthy options, and our hard work has been reflected in the great results shown in this report. Good nutrition to reduce the level of obesity, however, requires a comprehensive approach and no one industry can solve the obesity crisis alone. The BHA would like to see industry effort complemented by a stronger emphasis on nutrition and physical exercise in the school curriculum.”

Wendy Bartlett MBE, Executive Chairman, bartlett mitchell

100% of businesses said that sustainability was important or critical to their business (up from 94% in 2014)

Main Focus areas for FSM companies ranked in order of importance

<table>
<thead>
<tr>
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For British diners, the ‘story’ of how food has reached their plate has never been so important. It’s no longer just about taste, but about whether it’s sustainably sourced and made in respectable working conditions. Driven by a growing passion for food and a ‘farm to fork’ culture, diners expect to know where their food has come from and how it has been produced.

“Of course, when it comes to sustainability, ‘together’ is better, and we are working closely with partners across the Industry to ensure that our supply chains are transparent from ‘farm’ to ‘fork’, and the growing consumer passion for ‘good’ food is put into action.”

George Vezza, Managing Director, Nestlé Professional®
Health and Nutrition

Companies have continued to voluntarily provide significant investment in health and nutrition by cutting salt, sugar and fat, as well as increasing the fruit and vegetable content of dishes. Businesses continue to do their part to reduce obesity and this year’s results show the continued effort that FSM businesses have achieved.

100% of FSM companies are providing healthier alternatives with lower calorie options and including more fruit and vegetables in their menus.

What are you doing in relation to health and nutrition?

- Providing healthier alternatives
- Including more fruit and vegetables into menus
- Training chefs / others on healthy eating
- Display of nutritional information to customers
- Reducing calories per portion
- Calorie labelling
- Reducing portion sizes
- Reducing salt
- Fat reduction
- Reducing added sugar

The BHA Nutrition Working Group has been developing an industry nutrition guide to help businesses improve their cooking practices, as well as display this information to consumers. The guide will be published at the end of 2016.

BHA Nutrition Group

The BHA Nutrition Group was established in 2014 to bring together nutrition specialists from FSM and other hospitality businesses in the UK. The Group informs the Association’s public health discussions with government, and helps the BHA promote best practice across the industry. The Group also facilitates a cross reference of know-how between the larger and smaller businesses operating in UK hospitality.

BHA Nutrition Group Members

- Amadeus
- Association for Nutrition
- Bidvest Foodservice
- CH&Co
- Coca-Cola
- Greene King
- Hilton
- Jamie Oliver’s
- Kensington Roof Gardens
- McDonald’s
- Merlin Entertainments
- Mitchells and Butlers
- Nando’s
- Nestlé Professional
- Sodexo
- Unilever Food Solutions
- Whitbread Hotels & Restaurants
At Bidvest Foodservice, offering customers’ choice remains high on our agenda across our broad range of foods, alcoholic drinks and catering equipment and tableware too. As a result, we keep on top of key trends and work with industry stakeholders to ensure we understand changing industry standards and legislation and the impact this has on our customers.

‘Healthy’ eating has been high on the agenda for years and has taken many forms. From acknowledging calories and fat content, to reducing salt and sugar, or eating more vegetables and reducing overall portion sizes – creating a menu can sometimes be as difficult as trying to choose the right diet to follow at home.

Perhaps the reason is because ‘healthy’ has so many different definitions and is used to describe diets as broad as vegetarian, vegan, flexitarian and free-from, as well as foods which are better for us nutritionally. In fact, 33% of diners in a Sept 2015 Mintel Report even stated that they consider freshness the most important factor in deciding whether a dish is healthy, which demonstrates that often healthy is about perception.

Consumers are looking for the food they eat to have a benefit to their body too. They don’t just look at a dish as a whole, but instead consider every ingredient and its’ nutritional values, and as part of this we’ve seen increased interest in superfoods and protein, which are often added to unhealthier foods to provide a balance.

There has also been a lot of debate around sugar content in foods too, but this tends to be more about hidden sugars in seemingly healthy products such as smoothies, salad dressings and soups, rather than consumers having a desire to totally cut out anything sweet. In fact, 66% of diners in a Feb 2016 Mintel Report said they believe unhealthy snacks are fine as part of a balanced diet.

‘Healthy’ also extends to considerations around allergens and intolerances. Under the EU Food Information Regulations, consumers with medical intolerances now have access to information about the ingredients in all of the dishes on menus, and subsequently, majority of chefs are now better trained on the topic too.

We advise that food service outlets should offer their consumers choice. Healthy is all about transparency and personalisation and thus more outlets are moving towards giving consumers a choice of sauces, toppings, breads, or enabling them to swap chips for jacket potatoes, rice or salad. And lots of outlets have menus available which show the nutritional content of food, as well as detailing any allergens contained.

Consumer choice can differ by day-part too – so whilst someone might be very strict with their diet at the start of the day or during the week, they can often be tempted by a less healthy option after dinner or over the weekend.

By adding a range of fresh, healthy foods to any menu and even introducing smaller portions of foods alongside standard sizes, outlets can meet a wide range of consumer needs. This way, the decision of how healthy or indulgent to be still lies with the consumer.

Andrew Selley
Chief Executive, Bidvest Foodservice
The Responsibility Deal

Over 80% of food and service management companies signed up to the Public Health Responsibility Deal.

The Public Health Responsibility Deal for England, led by the Coalition government between 2010 and 2015, sought to tap into the potential for businesses and other influential organisations to make a significant contribution to improving public health. Hospitality and tourism businesses signed up to the Responsibility Deal, committing to take action to improve public health as employers, as well as through their commercial and community actions. Since this survey was completed, the Government has launched the Childhood Obesity Strategy, which follows the Responsibility Deal.

The majority of FSM businesses who signed up to the deal reported that there has been little impact to their business in terms of profits, but that an increase in healthier options had increased customer satisfaction, in turn increasing sales in some businesses.

*No businesses reported a reduction in any of the above.*

**What has been the business impact of the Responsibility Deal?**

- **Increased**
  - Sales: 37%
  - Profit: 9%
  - Customer satisfaction: 63%
  - Staff training: 45%
  - ‘Healthiness’ of food: 82%

- **No impact**
  - Sales: 63%
  - Profit: 91%
  - Customer satisfaction: 37%
  - Staff training: 55%
  - ‘Healthiness’ of food: 18%
Sustainable Sourcing

FSM companies continue to see the value in providing locally sourced food and ethical products containing labels such as free range, fair trade and organic.

Boundaries are being continually pushed to become more environmentally friendly when procuring products.

“...it is so encouraging to see how seriously food service companies are taking sustainability issues. I truly believe that we are way ahead of the rest of the catering & hospitality industry in this field and it would be great to see the wider industry following suit, to safeguard our food supply, our customers’ health and the planet’s precious resources for future generations.”

Phil Roker, Commercial Director, Vacherin

Meat

More FSM respondents are now gradually reducing the amount of meat on offer to accommodate consumer preferences and reduce their environmental impact.

Meat is not often available in a consistent supply at an affordable cost to hospitality businesses in the UK. The BHA has raised these concerns to Defra and are working closely with government to support their ‘Great British Food’ campaign.

Over half of all FSMs have reduced the amount of meat on offer. Of the meat they serve, between 50% - 85% is sourced from the UK.

Addressing Waste

Having been a supporter of the successful Hospitality and Food Service Agreement, the BHA have also now signed up to support Courtauld 2025, a ten-year plan to reduce waste from farm to fork.

The hospitality industry and its supply chain have already made significant progress in improving environmental performance on a voluntary basis, and now over 73% have a full food waste action plan.

Waste Not Want Not

Over the last year, the BHA has been working with partners SWR and Winnow Solutions on a campaign called ‘Waste Not Want Not’ which provides businesses with guidance on finding practical ways to further reduce their food waste, such as through myth-busting, menu planning and training.

Palm Oil

The BHA supported the UK Government to source sustainable palm oil. Last year, the BHA produced a practical step-by-step guide to procure sustainable palm oil. Subsequently, there has been over a 20% increase in uptake and sourcing of certified sustainable palm oil in the industry.

67% using sustainable sourced palm oil ingredients
1 Lombard Street, London
2be2serve, Haslemere
4C Hotels Victoria, London
60 Hope Street Restaurant, Liverpool
67 Pall Mall, London
A.B.M.S Education Group, Baar
AB Hotels, St. Albans
Abbotsholme School, Staffordshire
ABM Catering, Warwick
Accent Catering Services, Staines
AccorHotels, London
Ace Hotel, London
Act Clean, London
Admiral Group, London
Albertine, London
Alexandra Hotel & Restaurant, Lyme Regis
Alveston House Hotel, Bristol
Amadeus, Birmingham
Ambassador Hotel, Llandudno
Andaz London, London
Andrew Brown, Datchet
Andrew Brownsword Hotels, Bath
Angel Human Resources, London
Angela Hartnett, London
Ann’s Pantry, Anglesey
Apex Hotels, Edinburgh
Army & Navy Club, London
Arora Hotels, West Drayton
Artizan Catering, Wargrave
Arundell Arms Hotel, Lifton
Ascott Group, London
Ashewll Biomass, Leicester
Avoca House Hotel, London
Avvio, Limerick
Aynsome Manor Hotel, Grange over Sands
Azell Hospitality Management, London
Azzurri Group, London
Babylon, London
Bailiffscourt Hotel, nr Arundel
Baldwins Omega, Sheffield
Balmoral Hotel, Edinburgh
Bamboo Revenue, London
Barclays Bank, London
Barnsley College, Barnsley
Barons Pub Company, Woking
bartlett mitchell, Egham
BCS, Brighton & Hove
Bedford Lodge Hotel, Newmarket
Beechwood Hotel, North Walsham
Bel Canto Restaurant, London
Belle House, Pershore
Belmont House Hotel, Leicester
Berry Head Hotel, Brixham
Bespoke Hotels, London
Best Western Hotels, York
Bicester Village, Bicester
Bidvest Foodservice, High Wycombe
Bill’s Restaurants, London
Bingham Hotel, Richmond-On-Thames
Bird of Smithfield, London
Bleeding Heart, London
Blue Apple Contract Catering, Wokingham
Bluesky Pension Scheme, Sidcup
Bluestone National Park Resorts, Narberth
Boath House Hotel, Nairn
Bone Daddies, London
Boodle’s, London
Boscastle Farm Shop and Café, Cornwall
Boulestin, London
Bournemouth University, Poole
Boyes Turner, Reading
BP & SEM Consultants, Langley
Brend Hotels, Barnstaple
Bridge of Orchy Hotel, Argyll
Bridgestreet, London
Brigade Bar and Bistro, London
Broadoaks Country House, Troutbeck
Brooks’s, London
Brookwood Partnership, Walton on Thames
Browns Cafe, Cleethorpes
Brown’s Hotel, London
Bryn Bras Castle, Caernarfon
Burger King, Slough
Busaba Eathai, London
Butley Oysterage, Woodbridge
C London, London
Café 21, Newcastle Upon Tyne
Cafe Pacifico, London
Café Spice Namaste, London
Caffè Boiello, Worcester
Calcot Manor Hotel, Tetbury
Caf’s Head, Clitheroe
Cantley House Hotel, Wokingham
Caparo Hotels, Torquay
Caraffini, London
Careys Manor & Senspa, New Forest
Carlton Club, London
Carlton Hotel, Torquay
Carlton Towers, Goole
Carnegie Club at Skibo Castle, Dornoch
Caspian, Workington
Castle Hotel, Conwy
Casual Dining Group, London
Celtic Catering Partnership, Pontypridd
CH&Co, Reading
Champany Inn, Linthgow
Charlotte’s Group, London
Charlton Kings Hotel & Restaurant, Cheltenham
Cherwell Boathouse, Oxford
Chewton Glen Hotel, New Forest
Chez Bruce, London
Chez Lindsay, Richmond
Chris & Cherry, Portsmouth
Christie Group, London
Ciel Hotels, Penrith
City of Bristol College, Bristol
City of London Club, London
City University Club, London
Clarence, Stokenchurch
Clarke’s Restaurant, London
Classic British Hotels, Woking
Classic Lodges, Chorley
Clevedon Hall, Clevedon
Cloud Hotel, Brockenhurst
Club Gascorn, London
Club Insure, Leeds
Co Save, Horsham
Coca-Cola Enterprises, Uxbridge
Colchester Institute, Colchester
Coleg Llandrillo, Colwyn Bay
Condé Nast Johansens, London
Coningham Hall, Kings Lynn
Considerate Hoteliers, London
Corinthia Hotel London, London
Corney & Barrow Wine Bars, London
Côte Restaurants, London
Courthouse Hotel London, London
Crerar Hotels & Management, Edinburgh
Crescent Hotel, Harrow
Crescent Hotels, Margate
Crief Hydrop Hotel, Crieff
Crinan Hotel (Argyll), Lochgilphead
Crystal Hotels, London
Cvent Europe, London
D&D London, London
Danesfield House Hotel and Spa, Marlow-On-Thames
Dart Marina Hotel, Dartmouth
Davies Tanner PR, Tunbridge Wells
Deer Park Country House Hotel, Honiton
Dickens Wine Bar, Ysgol Fach
Dine Contract Catering, Warrington
Discover Financial Services, Riverwoods
Dodd & Co, Carlisle
Dolphin Hotel, London
Domino’s Pizza Group, Milton Keynes
Donnington Valley Hotel & Spa, Newbury
Dormy House Hotel, Broadway
Dorsett Shepherds Bush, London
Douglas Grant Associates, Teddington
Draycott Hotel, London
Drayton Manor Theme Park, nr Tamworth
Driftwood Hotel, Truro
Ducks at Kilspindie, Aberlady
Dukes Hotel, London
Dunoon Hotel, Llandudno
Durrants Hotel, London
East Lodge Country House & Restaurant, Matlock
Eastbourne Hospitality Association, Eastbourne
Eco, London
Ecolab, Northwich
Edge Hotel School, Colchester
Edinburgh Hotels Association, Edinburgh
Edinburgh International Conference Centre, Edinburgh
Ed’s Easy Diner, London
Elior UK, London
Elite Hotels, Forest Row
Elliott Marketing & PR, Linford Wood
Emile’s Restaurant, London
Empire Hotel, Llandudno
English Lakes Hotels, Windermere
Esseborne Manor Hotel, Andover
Estiatorio Milos, London
Euro Hostels, Glasgow
Europe Japan Centre, London
Exclusive Hotels, Bagshot
Exmoor White Horse Inn, West Somerset
Eynsham Hall Hotel, Witney
F&M Solutions Limited, Coggeshall
Falmouth & District Hotels Association, Falmouth
Farlam Hall Hotel, Brampton
Fence Gate, Burnley
Fetcham Tandoori, Leatherhead
Feversham Arms Hotel & Verbena Spa, Helmsley
First Floor Cafe, Windermere
First4Skills, Liverpool
Four Pillars Group, Witney
Four Seasons, London
Friends Restaurant, Harrow
G4S, London
Gather & Gather, Bristol
Georgian House Hotel, London
Gibbon Bridge Hotel, Preston
Gilpin Lodge Country House Hotel, Windermere
Giraffe Group, London
Gleneagles Hotel, Perthshire
Glengarry Castle Hotel, Invergarry
Glh Hotels, London
Glover’s Solicitors LLP, London
Go Native, London
Grand Harbour Hotel, Southampton
Gravetye Manor Hotel, West Hoathly
Greene King, Bury St Edmunds
Greenwoods Solicitors LLP, Peterborough
Grosvenor Hotel, Ilfracombe
Grosvenor Pulford Hotel & Spa, Chester
GSS Catering Management Services, Harpenden
Guido’s Restaurant, Amersham-on-the-Hill
H10 Hotels, London
Haikin Hotel, London
Hallmark Hotels, Warrington
Hambleton Hall Hotel, Oakham
Hamlins, London
Hampstead Village Guesthouse, London
Hand Picked Hotels, Sevenoaks
Harbour & Jones, London
Hard Rock International, London
Harrison Catering Services, Thame
Hart’s Nottingham, Nottingham
Harvey Nichols Restaurants, London
Haysmacintyre, London
HBIM, Plymouth
Headlam Hall, Darlington
Headland Hotel, Newquay
Health Monster, London
Hebridean Princess, Skipton
Heidrick & Struggles, London
Heritage Leisure Group, Chelmsford
Highlands Hospitality, Bruton
Hillbilly’s Fried Chicken, Londonberry
Hillstone Lodge, Isle of Skye
Hilton Hotels Corporation, Watford
Historic House Hotels, London
Historic Sussex Hotels, Midhurst
Hogan Lovells International LLP, London
Holbeck Ghyll Country House Hotel, Windermere
Holiday Villa Hotel & Suites London, London
Hotel Café Royal, London
Hotel Felix, Cambridge
Hotel Riviera, Sidmouth
House of Commons, London
House of Lords, London
Howards House Hotel, Salisbury
HQ Theatres and Hospitality, London
 Huffkins, Burford
 Hyatt Hotels, London
 Hydro Hotel, Eastbourne
 Ili Forno, Liverpool
 Imperial Hotel, Great Yarmouth
 Indian Zing Restaurant, London
 Intercontinental Hotels, Denham
 Interstate Europe Hotels & Resorts, Birmingham
 Isle of Eriska Hotel, by Oban
 ITC Academy, East Kilbride
 Jamjou, Kilkenny
 Jersey Hospitalit Association, Jersey
 Joe Allen, London
 Johnsons Stalbridge Linen Services, Shaftesbury
 Jones Lang Lasalle, London
Jumeirah Carlton Tower Hotel, London
K & K Hotel George, London
K West Hotel & Spa, London
Kaba, Tiverton
Kai Mayfair, London
Kent Hall Hotel, London
Kimboilton Lodge, Bedford
Kinloch House, by Blairgowrie
Kinloch Lodge Hotel, Sleat
Knappgarden & Soho North Restaurant, Sama
Knockinaam Lodge, Portpatrick
Knockomie Hotel, Forres
La Barbe, Reigate
La Brasserie, London
La Gaffe Hotel, London
La Porte des Indes, London
Lake Country House & Spa, Llangammarch Wells
Lakes Hospitality Association, Windermere
Lakeside Hotel, Newby Bridge
Lamont Pridmore, Workington
Lancaster London, London
Landley Hotel Group, London
Langar Hall Hotel, Nottingham
Langley Castle Hotel, Hexham
LCA Business School, London
Le Gavroche, London
Le Manoir aux Quat’Saisons, Oxford
Leander Club, Henley-On-Thames
Leeds Metropolitan University, Leeds
Legacy Hotels, Henley In Arden
Leisureplex Hotels, Chorley
Lester Hotels, Potters Bar
Linthwaite House Hotel, Windermere
Liverpool Football Club, Liverpool
Liverpool Restaurant Association, Liverpool
Living Ventures Procurement, Knutsford
Llandudno Hospitality Association, Llandudno
Llangelo Hall, Brecon
Loch Melfort Hotel & Restaurant, Oban
Lodge Hotels, Luckington
London Bridge and The Lister Hospitals, London
London Bridge Hotel, London
Losehill House Hotel & Spa, Hope
Lucknam Park Hotel, Chippenham
Lupton Fawcett Denison Till, Leeds
Malmaison Hotels, London
Manchester Metropolitan University, Manchester
Mandarin Oriental Hyde Park, London
Margot Restaurant, London
Marlin Apartments, London
Marriott Hotels, Luton
Marsham St Restaurant, London
Maybourne Hotel Group, London
Meejana, Weybridge
Melia Hotels International, London
Melita House Hotel, London
Mellington Hall, Powys
Miltons, York
Merlin Entertainments Group, Poole
Merlyn Court Hotel, London
Meson Don Felipe, London
Metropolitan, London
Metropolitan Restaurants, London
Millennium & Copthorne Hotels, London
Milsom Hotels, Colchester
Mintel Leisure, Newcastle Upon Tyne
Mitchells & Butlers, Birmingham
Monk Fryston Hall Hotel, Leeds
Montcalm Hotels, London
Moorfield Group, London
Morston Hall Hotel, Holt
Mount Charles Group, Belfast
MPM Catering, Shrewsbury
Mr Thomas’s Chop House, Manchester
Mullion Cove Hotel, Helston
Mumtaz Restaurant, Bradford
MW Eat, London
Myhotel Bloomsbury & Chelsea, London
Myhotel Brighton, Brighton
Nando’s Chickenland, London
Neds Noodle Bar, London
New England Hotel, London
New Lanark Hotels Ltd, Lanark
New World, London
Neway International, London
Nincomsoup, London
No. 11 Cadogan Gardens Hotel, London
North Wales Tourism, Colwyn Bay
Northcote, Blackburn
Northern Hotel, Bexhill-On-Sea
Northern Ireland Hotels Federation, Belfast
Noura, London
Oakwood, London
Oatlands Park Hotel, Weybridge
Ocean Hotel, Sandown
Ockenden Manor Hotel, Cuckfield
OCS Group UK, Crawley
Old Bridge Hotel, Huntingdon
Old Hall Hotel, Buxton
Old Kings Arms Hotel, Pembroke
Olive Catering Services, Ratcliffe Culey
Olivetree Restaurant, Southampton
One Aldwych, London
Onefinestay Members Club, London
Otus & Co, London
Oxford & Cambridge Club, London
Oxford Brookes University, Oxford
Park House Hotel, Norfolk
Park Lane Mews Hotel, London
Park Plaza Hotels Group, London
Parkdean Holiday Parks, Newcastle Upon Tyne
Patcharee Thai Restaurant, Kingston Upon Thames
Peace and Loaf, Newcastle
Peel Hotels, London
Pembroke Holiday Park, Pembroke
Penkerris, St Agnes
Penningtons Manches LLP, London
Penventon Park Hotel, Redruth
Pen-Y-Gwrwyd Hotel, Gwynedd
Pepe Sale, Reading
Peruga, Stockport
Planted, Bath
Porters English Restaurant, Berkhamsted
Portland Hotels, Edinburgh
Pride Catering Partnership, Guildford
BHA Members
BHA Members

The Great Barr Hotel, Birmingham
The Honourable Society of Lincoln’s Inn, London
The House of St. Barnabas, London
The Hoxton, London
The Kensington Wine Rooms, London
The Landmark London, London
The Lanesborough, London
The Langham London, London
The Lime Leaf, Basingstoke
The Lime Tree, Manchester
The Lincolns Inn, London
The Lion Hotel, Northwich
The Magpie Café, Whitby
The Manor at Weston-On-The-Green, Bicester
The Nare Hotel, Truro
The National Farmers Union Mutual Insurance Society, Stratford Upon Avon
The National Liberal Club, London
The New Club, Edinburgh
The Norfolk Club, Norwich
The Northern Quarter Restaurant & Bar, Manchester
The Old Course Hotel, Golf Resort & Spa, St Andrews
The Old Vicarage Hotel, Ambleside
The Penn Hotel, London
The Pines Hotel and Restaurant, Chorley
The Pipe & Glass Inn, Beverley
The Poachers Inn, Dorchester
The Portobello Hotel, London
The Rezidor Hotel Group, Manchester
The Ritz London, London
The Robert Gordon University, Aberdeen
The Savoy, London
The Shibden Mill Inn, West Yorkshire
The Sloane Club, London
The Square, London
The Stafford Hotel, London
The Torridon, Wester Ross
The Tourism Business, York
The Travellers Club, London
The University Women’s Club, London
The Vineyard at Stockcross, Newbury
The Waterside Inn, Bray
The Westwood Hotel, Oxford
The White Swan Inn, Pickering
The Willowbank Hotel, Largs
The Woodhouse Hotel, Largs
The Wordsworth Hotel & Spa, Grasmere
The Zetter, London
Thomas Franks, Banbury
Three Acres Inn, Huddersfield
Three Horseshoes Inn, Leek
Three Lions, Fordingbridge
Thurlestone Hotel, Kingsbridge
Toga Group, London
Torbay Tourism Association, Torquay
Totaljobs Group, London
Town & Country Lodge, Bristol
Travelodge Hotels, Thame
Treglos Hotel, Nr Padstow
Trump International, Menie Estate
Trunkwell Mansion House, Reading
Turpin Smale Catering Consultancy, London
Twelve Restaurant & Lounge Bar, Thornton-Cleveleys
Twycross Zoo, Atherstone
Tynedale Hotel, Llandudno
Union Jack Club, London
University College Birmingham, Birmingham
University of Derby, Derby
University of Portsmouth, Portsmouth
University of Surrey, Guildford
University of Ulster, Newtownabbey
University of Wales, Cardiff
University of West London, London
Vacherin, London
Vegas Hotel, London
Venners, Harlow
Vinoteca, London
Virgin Active, London
Vivo Taste, London
W7, Emsworth
Warren House, Kingston
WASCO, Havercroft West
Wateredge Inn, Ambleside
Waterscan, Chichester
Welsh Rarebits, Lampeter
Wembley National Stadium, London
Wentworth Hotel, Aldeburgh
Westminster Kingsway College, London
Westmont Hospitality Group, London
Westmorland, Penrith
Weston Park Enterprises, nr Shifnal
Westport Serviced Apartments, Dundee
Wetherby Whaler Group, Wetherby
Whistle Hospitality Marketing, Northwich
Whitbread Hotels & Restaurants, Dunstable
Whitfield Manor, nr Cheltenham
Williamson Morton Thornton LLP, St Albans
Windsor House Hotel, London
Winteringham Fields, Scunthorpe
Witchery by the Castle, Edinburgh
WM Consultancy, Dublin
Worsley Arms, York
WSH, Reading
Yapjobs, London
Yasmeen Restaurant and Catering, London
Yol Sushi, London
Yoshisushi Restaurant, London
Young Cheng, London
Yuet Ben Restaurant, Liverpool
To join
Go to www.bha.org.uk/join/

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Email membership@bha.org.uk

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