Hospitality: driving local economies

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.

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The hospitality industry plays a critically important role in both the economic and social life of local communities throughout the United Kingdom.

Alan Parker CBE
President
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Christopher Davy
Chairman
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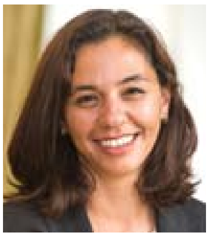

Ufi Ibrahim
Chief Executive
BHA

Appreciating the full impact of hospitality on local jobs, wealth, culture and heritage is the first crucial step to unlocking the industry's potential for regeneration and rebalancing growth across the UK. This knowledge also provides the building blocks toward local hospitality blueprints for competitive, dynamic and sustainable growth.

The BHA is committed to working with hospitality businesses, local communities and local government to realise the opportunities for thriving economies that can firmly advance the UK's agenda for growth and that can ensure a healthy competitive position for the future.

This report sets the platform for dialogue between the British Hospitality Association, local authorities, Local Enterprise Partnerships (LEPs), Destination Management Organisations (DMOs) and other local groups – all of which can make a real difference to the development of Britain's communities, economies and destinations.

It also sets out vital research – commissioned by the BHA and undertaken by Oxford Economics – which identifies each local authority in the UK 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 almost every local community's economic livelihood and particularly to its job-creating and wealth-creating potential. In only 22 of the UK's 406 local authorities does the industry's share of total direct employment fall below five per cent.

The report also underlines the significant impact of hospitality on local investment. In the hotel industry in the last decade, capital investment has reached £25bn with the construction of over 1,100 new hotels, much refurbishment of existing properties and the opening of many new restaurants and attractions. This is the equivalent of two years' hotel industry turnover and equal to 4.2 per cent of total investment in the economy, and almost identical to the industry's share of GVA. More investment is planned for the future – investment which will benefit almost every local economy.

We make it clear that the industry is not seeking government grants or handouts – rather it looks for a greater understanding of the industry's potential for growth through continuing public support of the various Visit agencies, greater financial encouragement for investment by the industry and a recognition that significant barriers have been created which need to be removed if the potential is to be fully realised. The measures and policies outlined in this report will achieve an even greater level of self-reliance than exists at present.

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But at a time of fragile economic recovery and intense competition for demand and resources, the hospitality industry's investment needs to be matched by policy and regulatory support from government, local authorities and LEPs. Providing a supportive framework is introduced and implemented in a timely fashion, hospitality businesses can create 236,000 new jobs by 2015 and a further 239,000 jobs by 2020 – jobs which are spread throughout the country. This will particularly benefit youth unemployment as many jobs in the hospitality industry are suited to young people.

Hospitality is thus a key element in the development of every local economy and, just as important, in its sustainable growth. In every local plan, a hospitality blueprint should be an essential part of an area's policy-making and of its economic and social structure. This is the challenge facing localism and the hospitality industry. It is a challenge that needs to be grasped by every local authority and every hospitality business in the UK.

Councillor Chris White
Chair, Local Government Group Culture, Tourism and Sport Programme Board

Local councils, the Local Government Group and the British Hospitality Association share an ambition to maximise the contribution of the visitor economy to growth, employment and quality of life in England. Councils have a long and successful track record in working with the tourist and hospitality sector to promote and improve the local visitor economy offer.

This offer is important to the vitality of the local economy because it supports employment, investment and skills. It also varies from place to place. We are a nation of authentic destinations, grounded in local communities and experience. People visiting the Yorkshire Moors, the Peak District and other National Parks will be looking for a different experience from people visiting our historic towns, who in turn are looking for something different to our urban centres or seaside resorts.

In the current economic climate the visitor economy must involve supporting tourism businesses, encouraging entrepreneurs and creating private sector jobs. The creation of Local Enterprise Partnerships (LEPs) means that business and civic leaders will need to work together for their area to support the visitor economy and create great places that people want to visit.

Each LEP will identify its priorities and the best way to achieve them. This will vary with local economic circumstances. Many LEPs are aiming to give a lead on the full range of interlinked issues that affect local economies and upon which a thriving visitor economy rests, including transport projects, superfast broadband and the local skills offer. Addressing these priorities will be relevant to the future success of the local hospitality sector and to unlocking the benefits that tourists and investment in the visitor economy can bring.

The value of the visitor economy as an industry is becoming better understood. This report illustrates the economic importance of the hospitality sector up and down the country and makes a strong case for the sector being an integral part of the local dialogue about growth.

- UK hospitality directly employs over 2.4m people and a further 1.2m in over 170,000 commercial establishment and 90,000 not-for-profit establishments in both the public and private sectors, amounting to eight per cent of the nation's jobs.
- Annual turnover is over £90bn (£46bn in Gross Value Added – wages and profits) contributing £34bn in gross tax revenues.
- The uncompetitive rate of VAT in the UK for hotel accommodation and attractions compared with other countries in the EU, visa costs and controls, Air Passenger Duty and the regulatory burden are significant barriers to growth.
- The hospitality industry is spread throughout the UK and, with tourism, is the economic driver of many parts of the country.
- Hospitality's share of total direct employment is five per cent or below in only 22 of the 406 UK local authorities.
- In terms of direct hospitality employment (Table 2), by far the largest local authority is Westminster. Noticeably, the areas with the highest number of hospitality jobs are (with the exception of Cornwall and Wiltshire) local authorities in major urban areas.
- However, as a percentage of hospitality employment to total employment, the Isles of Scilly, South Lakeland and Eden in the Lake District are ranked second, third and fourth, with the more rural areas of Cumbria, parts of Yorkshire, Lincolnshire and Wales being in the top 20 regions (Table 3).
- The value of hospitality to some areas of the country, such as the Isles of Scilly, Lake District, coastal towns and remote areas of Scotland and Wales, is critical (Table 4). Without hospitality, these regions would offer very few alternative employment opportunities.
- In only one Local Enterprise Partnership area is employment in hospitality less than six per cent of the total; in some areas, Cornwall and Cumbria for example, it is much higher (Table 6).
- The number of people in direct hospitality employment is forecast to rise to 2.9m by 2020 (Table 9).

BHA recommendations and commitments

- Local authorities should acknowledge the economic and social importance of the hospitality industry and the contribution it makes to local life and prosperity.

  – ***BHA will emphasise to ministers and all decision-makers the vital role that the hospitality and tourism industry plays in the economic and social life of every local authority in the country.***

- The government's tourism strategy puts a specific burden on local authorities, local businesses and partnerships to market their area in the most effective way – "a strategy that will ensure that decisions on local tourism policy are driven by those who know their area best . . "

  – ***Through the active participation of its members, BHA will influence positively the approach of local authorities towards the hospitality industry in their area.***

- Local Enterprise Partnerships should recognise that the hospitality industry is the economic driver of many areas of the UK and should focus support on its growth and development, so that demand can be encouraged and local jobs created.

  – ***BHA will press all LEPs to support the hospitality industry's job-creating potential.***

- Destination Management Organisations, which are responsible for the promotion of local areas and the provision of some visitor services, play a key role in the success of the local tourism and hospitality industry.

  – ***BHA will work to support efforts to sustain Destination Management Organisations.***

- Support for LEPs and DMOs by local hospitality and tourism businesses is a pre-requisite for success in promoting local tourism.

  – ***BHA 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.***

- Tourism and hospitality represent one industry – albeit one of the most important – in every local authority area. It is essential that in every local plan, the interests of the industry are integrated with those of other industries and services, such as planning, environment, transport, regeneration and licensing.

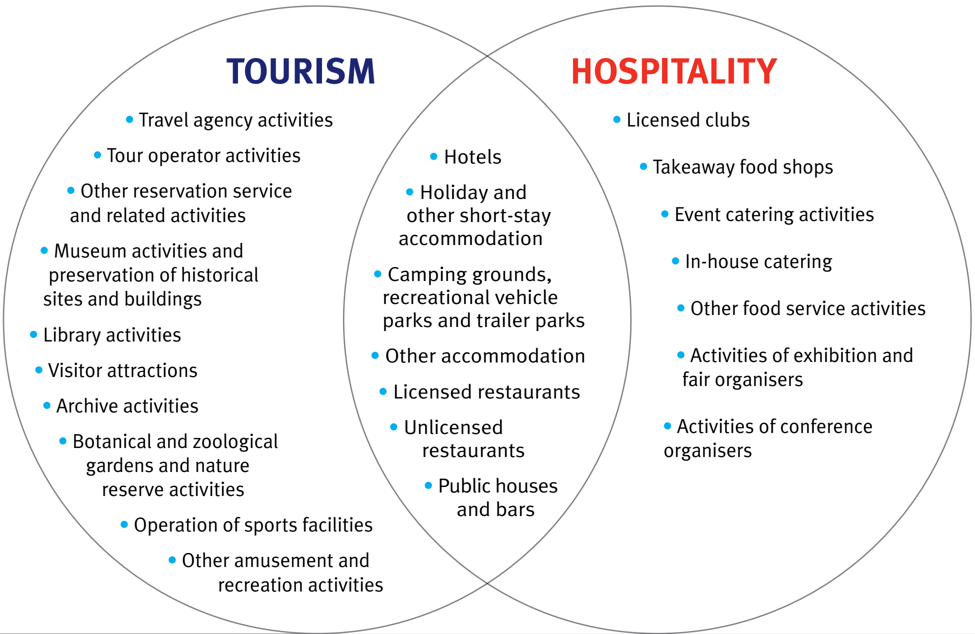
  – ***BHA will work with all local authorities to develop local hospitality blueprints for sustainable development and growth.***

What is the hospitality industry? 1

Hospitality is one of the main pillars of the UK economy and the economic driver of almost every part of the country. It is the fifth largest industry in the UK, directly employing over 2.4m people and accounting for a further 1.2m indirect jobs through the industry's multiplier effect on other sectors, such as the food supply and building industries.

The industry contains over 170,000 commercial businesses throughout the UK, with a further 90,000 outlets in such areas as healthcare and education catering. These provide eight per cent of the nation's jobs and in some parts of the country, a much higher percentage – nearly 40 per cent in the Isles of Scilly. It is the country's third largest export earner and contributes over £34bn in gross tax revenues to the Treasury accounting for almost £90bn in turnover and £46bn to the UK economy in Gross Value Added (GVA) – that is, wages and profits.

A key strength of the industry is that its wealth and job creating 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. But not only is hospitality important to the economic success of local economies, it also plays a significant role in the social and cultural life of their communities.



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.

Hospitality is an active engine of travel and tourism to and within the UK. Without a dynamic hospitality economy, Britain cannot enjoy a thriving tourism industry, which contributes some £114bn to the UK economy.

2 The BHA national agenda for growth

There are significant barriers to growth over which central government rather than local government has responsibility. If these barriers are not addressed then the UK government's targets (set out in the UK Tourism Policy) will not be achieved. These targets include:

- **Growing inbound tourism to the UK by an additional £2bn.**
- **Increasing the proportion of what British people spend on holiday in the UK to 50 per cent (it is currently 40 per cent).**

To achieve the government's targets and to unlock the hospitality industry's potential to create 236,000 additional jobs by 2015, barriers that continue to discourage demand and hold back job creation – just at a time when jobs are most needed – must be removed.

Britain's lack of price competitiveness with other major European countries represents one of the biggest hurdles. According to the World Economic Forum's latest Travel and Tourism Competitiveness Index, the UK ranks 135th out of 139 countries on price competitiveness. Growing the hospitality economy depends on improving this position so that the whole UK economy can benefit.

The BHA's National Agenda for Growth aims to position Britain – embracing all local economies – to become more competitive on the world stage and to facilitate the creation of 236,000 new jobs.

1. To make the rate of VAT on UK hospitality competitive with the rate of other EU member states.

The UK cannot realistically compete with European competitor countries when all but two other EU member states have a reduced rate of VAT for hotel accommodation – see Table 8 on page 25. 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 on the industry 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 HM Treasury.

Latest figures in France suggest that the reduced VAT rate for restaurants has created 53,900 jobs over two years. Earlier figures indicate that an estimated 15,000 establishments have been saved from bankruptcy, thus saving a further 30,000 jobs in addition to those created. In addition, the minimum monthly wage in the restaurant industry has increased from €1,350 to €1,620 and annual staff turnover has fallen from 80 per cent to 40 per cent. It is too early to assess the impact of the reduction in VAT for hotel accommodation in Germany but initial findings suggest that hotel investment in the first year of the reduction has been boosted, 10,000 full-time jobs have been created, over one third of hoteliers have increased wage levels and a similar number have reduced prices.

2. 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. Application forms, which are not in the appropriate language, need biometric details, and require a personal visit to a UK consulate. The delay in visa processing by the UK is 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.

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

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

4. To ensure that funding for VisitBritain and the other visit agencies is ring-fenced.

Funding should be regarded as a necessary investment, central to the success of UK tourism and the hospitality industry. Britain attracts over £16bn in overseas visitor spend – a significant part of which is the result of the public funding invested in VisitBritain and other agencies. The return on this investment is estimated at 30:1 so that every £1 invested in VisitBritain marketing produces £30-worth of additional inbound business.

5. To encourage the Regional Growth Fund to recognise the significance of the hospitality industry to local economies.

The industry is able to create jobs – at all skill levels – as effectively as other sectors of the economy because it is so dependent on people to provide a service. In addition, the training needed for some jobs is quite short which means that people can be taken on without a long period of preparation. Any increase in consumer demand quickly translates into an increase in jobs. The Fund should also recognise that the on-going promotion of tourism areas to build demand is as important to their long-term growth as attracting capital investment.

6. To minimise the regulatory burdens on the industry and to cut red tape.

Implementing the rising number of UK rules and regulations costs management time and money. This burden needs to be eased. The hospitality industry is working closely with the Tourism Regulation Task Force, set up by DCMS under the chairmanship of Alan Parker CBE, president of the BHA. Working with industry experts this task force will propose solutions to government to be addressed in 2012.

7. To ensure that LEPs regard the hospitality industry as a key pillar of their local economy.

LEPs must introduce policies that create an environment in which hospitality businesses can grow and develop as an integral part of the local plan. With the tourism marketing structure at regional and local level so negatively affected by current government policies, the role of LEPs is even more critically important. However, there is a visible lack of hospitality industry leaders currently on their boards. This failure to embrace one of the key job-creators of the UK presents a significant missed-opportunity and therefore must be addressed.

8. To stimulate even more investment in the hospitality industry.

This should be achieved through a change in legislation, expediting streamlined planning procedures and encouraging more investment in the hotel industry despite the removal of the Hotel Buildings Allowance, and making it easier for hotels to operate within the framework of Real Estate Investment Trusts. By stimulating more investment in the industry, the government will enable more jobs to be created.

9. Providing a level playing field and fair basis for comparison between private and public sector bids for the outsourcing of food service and general facilities management.

This would enable commercial companies to bring greater efficiencies to public services and to the taxpayer across the UK at a time when local authorities are having to cut budgets and realise ever-greater efficiency savings. Commercial companies have the expertise to help local authorities achieve their new budget targets.

3 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 and to the 38 Local Enterprise Partnerships that have so far been approved. 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 PRESENTS A HUGE ECONOMIC OPPORTUNITY. NOT JUST BRINGING BUSINESS TO BRITAIN BUT RIGHT ACROSS BRITAIN DRIVING NEW GROWTH IN THE REGIONS AND HELPING TO DELIVER THE REBALANCING OF OUR NATIONAL ECONOMY THAT IS SO DESPERATELY NEEDED.'

David Cameron MP, Prime Minister

The BHA welcomes the government's recognition of the importance of tourism, of which hospitality is an integral part. The Prime Minister made it clear in a speech in August 2010 that income from tourism was "fundamental to rebuilding and rebalancing the UK's economy". This was further developed in the government's tourism strategy, published in March 2011, where the prime minister stated that he wanted to "take tourism in Britain to a whole new level and harness the huge potential this area holds to grow our economy."

In its proposition to government – detailed in its report *Creating Jobs in Britain* – the BHA outlined three objectives:

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

These objectives are attainable providing the right supportive framework is in place. The national barriers to growth have already been outlined and these need to be addressed before UK tourism, and the hospitality industry within it, can maximise its full potential in economic and job creating terms. However, this should not hide the fact that there is a local dimension which is just as important.

The government's localism agenda is pushing decision-making in many areas of the economy down to local, even parish authorities. Regulations in such matters as planning, the environment, licensing are being eased or, conversely in some cases, strengthened. The most recent government proposal which will allow local authorities to keep part of the income raised by Business Rates – which has traditionally gone straight to central government – represents a significant change in local authority finance.

As a result, local authorities, LEPs, local Destination Management Organisations and other structures such as Business Improvement Districts, will impact more heavily on the hospitality industry – and on the wider tourism industry – than before. Local organisations have, or will have, the power to influence the industry's growth and development in ways that were hitherto not possible.

This makes the timing of this report especially relevant. Some local authorities already recognise hospitality's contribution to their economy but others may not be aware of the industry's size and relevance. This report is a call to action for every local authority and for all local tourism and hospitality businesses.

Local hospitality agenda for growth 4

The most significant characteristic of the hospitality industry is that its 260,000 establishments are spread throughout the UK. The relevance of local decision-making is thus extremely important. The BHA, representing a membership spread throughout the country, believes that local authorities – and emerging local organisations like LEPs – must appreciate the contribution that the industry makes to local economies and to local life.

Achieving the national objective of creating 236,000 new hospitality jobs by 2015 rests as much on their policies, their decisions and their support as on the national government.

- Local authorities should acknowledge the economic and social importance of the hospitality industry and the contribution it makes to local life and prosperity. They should introduce policies that reflect this recognition and that prioritise hospitality as a key driver of local jobs. Taking direct, indirect and induced employment together, hospitality generates approximately one job in five in seven local authorities and one job in ten in 306 local authorities.

- The government's tourism strategy puts a specific burden on local authorities, local businesses and partnerships to market their area in the most effective way – "a strategy that will ensure that decisions on local tourism policy are driven by those who know their area best . . " Local authorities should follow up the government's national aims for UK tourism in their own area so that the strategy is supported throughout the country.

- Local Enterprise Partnerships should recognise that the hospitality industry is the economic driver of many areas of the UK and should focus support on its growth and development, so that demand can be encouraged and local jobs created. Hospitality accounts for between 5.9 and 11.0 per cent of direct employment and between 3.0 and 7.8 per cent of total GVA of all the LEPs so far established, thus making it one of the most significant industries in any LEP remit. LEPs thus have a responsibility to meet the challenges facing the industry and the benefits in job and wealth creation that will accrue by overcoming them.

- Destination Management Organisations, which are responsible for the promotion of local areas and the provision of some visitor services, play a key role in the success of the local tourism and hospitality industry. Future funding for many DMOs is problematic. Local authorities must recognise that some public funding remains essential for as long as DMOs find their feet in the post-RDA scenario, so that they can continue to provide important visitor services in the most economic manner.

- Support for LEPs and DMOs by local hospitality and tourism businesses is a pre-requisite for success in promoting local tourism. Funding from local authorities and public agencies for local initiatives will remain increasingly difficult to attract and will typically depend on match-funding in cash or in kind. The contribution to these activities by local businesses will be critical. The further development of Business Improvement Districts, funded by a statutory levy, is to be welcomed providing the industry's needs are recognised alongside those of other industries.

- Tourism and hospitality represent one industry – albeit one of the most important – in every local authority area. It is essential that in every local plan, the interests of the industry are integrated with those of other industries and services, such as planning, environment, transport, regeneration and licensing. The success of the hospitality industry depends on this holistic approach in which tourism and hospitality are integrated as key elements of the local economy. The BHA calls on all local authorities to work with the industry to establish a blueprint for the growth of hospitality jobs and wealth.

BHA's commitments

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

- We will emphasise to ministers, officials, MPs, MSPs, Welsh Assembly members 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 236,000 new hospitality jobs by 2015.
- Through the active participation of BHA members, we will support the work of Local Enterprise Partnerships and seek to play a part in their policies and decision-making processes in supporting the hospitality and tourism industry.
- Through the active participation of BHA members, we will support efforts to sustain Destination Management Organisations, so that they – or similar organisations – are soundly based and economically run, bringing positive benefits to the area.
- We will assist the work of VisitEngland in understanding LEP priorities and contribute nationally to any discussions with LEPs on their policies and support for hospitality and tourism.
- We support VisitEngland's bid for funding from the Regional Growth Fund.
- 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 and we will ensure that members provide input to their content and that the association works with such organisations as the Institute of Hospitality, the Professional Association for Catering Education (PACE) and the Council for Hospitality Management Education (CHME).
- We will discuss with VisitEngland and HM Treasury the establishment of Business Improvement Districts specifically for the tourism industry.
- We will work with all local authorities to develop local hospitality blueprints for sustainable development and growth.

Hospitality – impact on local economies 6

In regional terms, the value of the visitor economy is well known. Domestic and overseas visitor spend is over £86bn – see Table 1. London is by far the biggest region both in terms of visitor spend and in terms of hospitality employment, though it earns far more from overseas visitors than from domestic visitors. All other regions earn more from domestic than overseas visitors.

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

Region	Expenditure £bn (total domestic and overseas visitor spend, 2009)	Direct employment in hospitality 2010
ENGLAND		
Greater London	11.26	396,505
North East	0.83	91,191
North West	3.28	266,800
Yorkshire	1.90	176,307
West Midlands	1.63	191,621
East Midlands	1.35	155,498
East of England	2.04	209,448
South West	4.52	218,774
South East	3.95	339,326
ENGLAND	**30.83**	**2,045,470**
England Day Visits*	41.24	
SCOTLAND	**4.08**	**222,083**
Scotland Day Visits*	4.49	
WALES	**1.78**	**112,227**
Wales Day Visits*	2.41	
NORTHERN IRELAND	**0.74**	**60,803**
NI Day Visits*	0.91	
TOTAL	**86.48**	**2,440,583**

Source: National tourist boards

* Day visitor figures are estimated in the Deloitte/Oxford Economics report *The Economic Contribution of the Visitor Economy*, commissioned by VisitBritain (2010).

But how important is hospitality to each local authority in terms of employment, and how much is it worth?

Oxford Economics' research (see the full tables on pages 26-31) provides a complete picture of the economic contribution of the hospitality industry to every local authority in the UK. It emphasises the critical importance of the industry to wealth-generating and job-creation at both local and national levels.

In terms of direct hospitality employment (Table 2), by far the largest local authority is Westminster. Noticeably, the areas with the highest number of hospitality jobs are (with the exception of Cornwall and Wiltshire) local authorities in major urban areas. This reflects the number of hotel, restaurant and pub outlets in large towns and cities whereas employment in rural areas is more spread-out.

Table 2: **Direct hospitality employment – top 20 local authorities (2010).**

Rank	Local Authority	Direct employment
1	Westminster	86,400
2	Birmingham	36,800
3	Glasgow City	35,400
4	City of Edinburgh	32,400
5	Manchester	31,100
6	Leeds	30,400
7	Cornwall	28,600
8	Camden	28,300
9	Liverpool	21,500
10	Kensington and Chelsea	21,100
11	City of London	20,400
12	Sheffield	19,600
13	Wiltshire	17,800
14	Newcastle-upon-Tyne	17,700
15	City of Bristol	17,700
16	Cardiff	17,200
17	City of Aberdeen	16,700
18	Hillingdon	16,500
19	Co Durham	16,200
20	Belfast	15,900

But while hospitality is more significant in some areas than others, it remains an important industry throughout almost all of the UK, with its share of total direct employment being five per cent or below in only 22 of the 406 local authorities.

There is thus a clear correlation between visitor numbers, levels of employment and GVA; overall, there is little variation across the top 20 in terms of visitor numbers and expenditure. For example, only York and Wiltshire, ranked 17th and 19th in terms of visitor numbers, do not appear in the top 20 in terms of visitor expenditure. Hillingdon appears in the top 20 in terms of expenditure but not visitor numbers because it includes Heathrow Airport.

As important as the total number of employees is the percentage of hospitality employees to total direct employment and to direct, indirect* and induced* employment (Table 3) is even more important. This indicates the relative importance of hospitality to the economy of the particular local authority.

** Indirect employment comprises 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 as jobs in retail outlets, companies producing consumer goods and a range of service industries.*

Table 3: **Hospitality employment as a percentage of total employment – top 20 local authorities.**

Rank	Local Authority	% of direct employment	% of total indirect and induced employment
1	Kensington and Chelsea	16.8	22.0
2	Isles of Scilly	15.9	25.3
3	South Lakeland	15.7	22.5
4	Eden	15.6	22.9
5	Scarborough	14.9	21.7
6	Weymouth and Portland	14.8	20.2
7	Torbay	14.2	20.8
8	Gwynedd	13.8	19.9
9	Conwy	13.7	19.2
10	Westminster	13.4	18.0
11	Forest Heath	13.2	19.3
12	East Lindsey	12.9	19.3
13	Great Yarmouth	12.7	18.4
14	Bournemouth	12.7	17.9
15	Blackpool	12.7	18.2
16	Newark and Sherwood	12.2	18.9
17	Highlands	12.1	18.9
18	North Devon	12.1	17.1
19	Moyle	11.6	18.5
20	Cornwall	11.6	18.0

The top twenty areas in Table 3 are different to those in Table 2 and clearly show the significance of hospitality to the more rural areas of Cumbria, parts of Yorkshire, Lincolnshire and Wales as well as to small economies such as the Isles of Scilly, South Lakeland and Eden in the Lake District, which are ranked second, third and fourth.

Local organisations 7

In local terms, different organisations are able to influence or support the hospitality industry, or have the potential to do so. These include local authorities, LEPs, DMOs, and Business Improvement Districts (BIDs) as well as local businesses themselves.

Local Enterprise Partnerships

The government's principal means by which decision-making is being moved down to local levels is the Localism Bill, which is currently making its way through parliament. This aims to give local authorities the formal legal ability to respond more easily and quickly to local needs, and sets out proposals which will achieve a substantial shift in power away from central government towards local government. The intention is also to give councils more freedom to work together, which in turn aims to drive down costs, and to give them increased confidence to introduce creative, innovative initiatives to meet local needs.

Part of the government's approach (though not part of the Localism Bill) is the decision to abolish England's Regional Development Agencies in favour of Local Enterprise Partnerships.

LEPs are a partnership between either a single local authority or a coalition of local authorities with local businesses, colleges and universities. They are designed to return responsibility for economic development, inward investment, job creation and upskilling to grass roots level.

The importance of LEPs was emphasised in a speech by David Cameron when he said that tourism presented a huge economic opportunity – "not just bringing business to Britain but right across Britain, driving new growth in the regions and helping to deliver the rebalancing of our national economy that is so desperately needed."

One of their responsibilities – indeed, the principal one in some areas – is to generate growth in the tourism and hospitality industry. However, it is unclear whether they will have the resources to take tourism and hospitality in their area to new levels, as the Prime Minister aims. There are no plans that LEPs should provide core funding for tourism activities.

While some LEPs may take a particular interest in tourism, others may not. Traditionally, however, local tourism bodies have not always been well connected with the mainstream economic agenda and in the future this may need to change. There is a danger of losing the improved connectivity gained when these bodies were funded by the RDAs.

So LEPs need to involve tourism in their work on planning, transport, inward investment and other economic issues, and the tourism industry needs to ensure LEP involvement. It is a shared responsibility. It is important that LEPs should not see tourism just as an activity solely revolving around promotional and image activities. Tourism is a key element in the local economy and needs to be developed as part of a local plan. If tourism is ignored, its potential for growth will not be maximised.

The BHA welcomes the fact that VisitEngland is developing an understanding of LEP priorities where tourism features, with some encouraging examples:

- Strengthening and facilitating private sector-led partnerships. In the Derby, Derbyshire, Nottingham and Nottinghamshire LEP, tourism is represented on the LEP Board. The LEP will have a role in further developing tourism strategy and direction-building on major assets such as Peak District, Nottingham, Derbyshire Dales and Sherwood Forest.
- Improving the image and branding of an area to attract and retain investment and support business and leisure tourism. The Birmingham LEP will have a dedicated resource through Marketing Birmingham to deliver this.
- The West of England LEP will work with partners (including VisitEngland and Destinations Bristol and Bath Tourism Plus) to achieve a 15 per cent real term increase in tourism earnings in the next decade.

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- Greater Manchester LEP has invested in tourism and is seeking to realise the value of its investment. Marketing Manchester (including VisitManchester) is at the heart of this approach.

- Tourism in the Liverpool City Region is projected to grow by 60 per cent in the next 10 years, creating 14,000 new jobs. The LEP will establish the area as a top international and national investment location and tourism presents a huge economic opportunity.

- The New Anglia Local Economic Partnership – set up only in May – recognises tourism as a key initial priority sector and one that offers the best chance of creating more jobs in the area. Funding for Choose Suffolk, the public private partnership currently responsible for promoting Suffolk, ceased in September this year with the demise of the East of England RDA. The New Anglia LEP, however, plans to take responsibility for tourism as one of its highest priorities, with proposals for a combined 'back office' organisation to support tourism in both Norfolk and Suffolk under the auspices of the LEP.

These are encouraging developments but it is essential that all LEPs should have tourism and hospitality representation on their boards and even in their management structure. At a time when LEPs are being formed and established, this is precisely when the industry's case should be most strenuously promoted by local hospitality interests, including regional committees of the BHA, local hoteliers and restaurateurs, local catering companies and local attractions.

Destination Management Organisations

Destination Management Organisations have a specific tourism or destination remit; they are principally a private sector partnership but many have derived much of their funding in the past from RDAs as well as from local authorities. They are critical to the success of local tourism by providing the capacity for cross-industry collaboration and joint activities. However, in the change from RDAs to LEPs, there is a danger that many of them will fall by the wayside because funding has been withdrawn too quickly, giving them too little time for them to adapt to the more private sector-funded approach. As a result, they have had to downsize too quickly, losing staff and expertise. Business support programmes have been abruptly ended with a disheartening reduction in DMO marketing capabilities.

This is an unsatisfactory situation for DMOs have been able to provide experience and expertise on the visitor economy at a local level, with good connections to local decision-makers. The present state of flux and uncertainty, however, means that the drive to boost tourism in the local economies is in danger of losing momentum; quick action is needed if that momentum is not to be lost and, with it, the loss of local expertise.

DMOs need a plan which brings together the public and private sectors to guide a destination's development and growth. Strong leadership is therefore required, not just good marketing skills, with sufficient funding. For the latter, they must demonstrate that their range of activities – not just marketing – have a real economic, environmental and societal impact to the area. Only in this way will public sector funders see a return on their investment. Producing shiny brochures and flashy websites will not be sufficiently persuasive. The private sector, in its turn, will need to see a return on its investment in terms of increased visitor numbers.

Disappointingly, VisitEngland's bid in the first round of the Regional Growth Funding to facilitate co-ordinated local tourism organisation promotion and to realise the opportunities presented by the 2012 Olympic Games, was rejected. A second bid was awaiting a decision at the time of going to press. However, we welcome the allocation of £3m unspent Olympic funding to VisitEngland, announced by the DCMS as we went to press.

It would be wrong to suggest that the whole picture with regard to DMOs is gloomy. Some local authorities, together with their LEPs, recognise the critical importance of tourism and hospitality to their area and continue to support their various tourism agencies, though perhaps on a reduced scale. New DMOs are emerging and chambers of commerce are getting involved to a greater extent than in the past, thus increasing private sector support. The Lakes Hospitality Association, for example, has taken over the operation of TICs in the area from the local authority. In some cases, Business Improvement Districts (see right) are emerging, which are able to provide some funding and other support for aspects of tourism in their areas.

New models of destination management will be formed in the future, with decreasing reliance on public funding and greater dependence on private sector support and leadership. These will have a varied mix of responsibilities suited to local needs.

The BHA supports VisitEngland's efforts to smooth the transition of DMOs from their previous funding regime to new sources of finance. In particular, it particularly welcomes VisitEngland's Pathfinder DMO programme in which four DMOs (Bath, Peak District and Derbyshire, The Broads, and Manchester) have agreed to share their experiences as they tackle the challenge of reduced funding and changing delivery landscapes.

What is important is that the DMO network should be maintained and even expanded if local economies are to reap the full benefit of the wealth-generating and job-creating opportunities presented by the tourism and hospitality industry.

This action can only come from local hospitality and tourism interests. They urgently need to ensure the continuing survival of DMOs and similar local tourism agencies. Time is short. Without their support, local tourism agencies will not be able to survive; once they disappear, any revival will be made that much more difficult.

Business Improvement Districts

A Business Improvement District (BID) is a business-led and business-funded scheme which aims to improve a defined commercial area, such as a town centre or industrial estate by providing additional services or new initiatives.

BIDs are funded through a statutory levy calculated on the rateable value of all businesses within the area. Most BIDs apply a one per cent or two per cent levy and exempt very small ratepayers. This levy income can be used to lever in more funding during the five year scheme, maximising the potential funding stream and the benefits that the BID can achieve. A BID can only be established if the majority of businesses, by number and rateable value, want it.

BIDs are an effective way of funding local initiatives through local businesses as they can provide a significant addition to those local services which are generally perceived to be important but which are not provided by the local authority. As the funding is raised locally through a statutory levy, local businesses decide how the money is used. The benefit of this is that the BID integrates these businesses more securely into local activities and helps to answer the (untrue) charge that businesses are happy to accept public funding but are unwilling to make any financial contribution to local initiatives.

Over 110 BIDs have been established: two examples in tourist-dominated areas are Skipton in the Yorkshire Dales and, much more recently, Newquay in Cornwall. In London, Tony Matharu, of the Grange Holborn Hotel, is a member of the Holborn BID board.

The Skipton BID, which will raise some £500,000 over five years, concentrates on marketing and promoting the town as a high quality destination, improving its built environment, improving car parks, helping to finance and develop existing and new festivals, expanding the town's provision of Christmas lights and providing a well trained and flexible work force – all highly desirable objectives but which would be difficult to fund by any other means.

In Newquay, nearly three quarters of businesses voted to create the BID with Veryan Armstrong, of the Headland Hotel (a BHA member) as chair of the BID Steering Group. >>>

The BID, which aims to improve the town's flagging image, hold more events and brighten up the town's streets, will raise about £150,000 a year.

Ms Armstrong says: "This is an amazing opportunity for businesses in Newquay to work together to improve the prospects of the resort, boosting all our income and conveying a positive image of Newquay at the same time.

"While it's a difficult time to find extra money, we cannot afford to do nothing while other UK resorts are promoting themselves to visitors who otherwise might come here."

The BHA welcomes the introduction of BIDs, especially in those areas where the tourism and hospitality industry can comprehensively benefit from its activities. BIDs are thus an excellent example of private/public partnerships working to the benefit of local communities.

However, they plainly raise the question of whether they will inhibit the survival – or extension – of DMOs and other tourism bodies. Business ratepayers paying a levy to a BID may be reluctant voluntarily to provide further funds for a DMO. On the other hand, a BID can support – and help fund – a DMO, or vice versa. This means that both BIDs and DMOs can co-exist providing they understand where their objectives align and have clear priorities which do not conflict, so that they work together for the benefit of local businesses.

They also raise the question of whether a Tourism BID could be established, exclusively focused on promoting and implementing tourism activities by local tourism business ratepayers. Discussions between interested destinations, such as Bristol and Birmingham, alongside VisitEngland and the government are ongoing. The BHA looks forward to lending its support to these discussions and to a projected conference on the subject.

Local authorities and the tourism industry 8

The key role that local authorities 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 the 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. In short, hospitality and tourism is an integral part of the fabric of local life.

There are many different strands to this.

1. Economic

We have already stressed the value of the industry to local authorities – and see pages 26-31 for the full list of local authorities.

2. Environmental

Tourism depends on an area's attractions and on its intrinsic attractiveness. Local and national authorities carry 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 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. It is significant, for example, that both Skipton and Newquay BIDs are prioritising the creation of local events and festivals in their activities.

4. Licensing

Local authorities have jurisdiction over most areas of licensing but the area most concerning the hospitality industry is liqour 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, which they will be able to decide whether to use or not.

Early Morning Restriction Orders allow councils to ban the sale of alcohol in any part (or all) of their area, at any time between midnight and 6.00am and on any day or days of the week, while the Late Night Levy, as the name indicates, can be imposed if a council so decides, across its whole area on any premises selling alcohol.

The Act emphasises, once again, the powers that local authorities have to control the sale of alcohol in their area and their ability to restrict opening hours – and, thus, business activities. We believe that these powers are unnecessary and, if they are used, should be used only after extensive consultation with hospitality businesses.

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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 urges all local authorities to adopt the national scheme and not to introduce their own variation (some based on star ratings) which will be 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

Government policy is to decentralise decision-making down to local levels and free up the planning laws so that some building activities can proceed without having planning permission. However, it is likely that most projects will still require planning permission, though the government is urging a more sympathetic approach and faster decision-making. Green Belt areas appear to be under some threat from this policy although government denies this. The BHA welcomes a less restrictive planning regime but it recognises concerns that some building projects will inevitably impinge on the environment. It is vital that an area's attractiveness – which is the main reason for people to visit – is not sacrificed by commercial activities which will deter those same visitors. Local authorities must be sensitive both to the needs of the industry and the local environment.

7. Inward investment

Every local authority has a key role to play in promoting the area as a good place in which to do business. This can be through its sympathetic interpretation of planning regulations, the general upkeep and enhancement of the environment, the enthusiasm of its promotional activities – or by any other means. This often depends on the level of local leadership and on the pressure which local businesses are able to exert on local authorities. Resort areas, in particular, have suffered in the past from failing visitor numbers with declining general popularity and visitor income. However, hotel investment in resorts is improving, if patchily, and Cornwall, in particular, has seen a number of new hotels in recent years while Brighton re-invented itself some years ago. It is, however, 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 influence this through planning and other policies that recognise hospitality's role as a major job creator.

8. Promotion

With promotion of local hotels, restaurants and attractions comes the question of standards and quality. 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. The BHA believes this is the right approach. Too few hotels are currently in the national scheme and there are some examples in the country where the general standard of guest accommodation leaves room for improvement and refurbishment.

Local authorities must recognise that if the UK is to compete effectively on the world stage – which also means attracting British residents away from overseas travel to holiday in this country – then standards of accommodation provided in their area must meet competitive standards. In many cases, the standard of accommodation provided in a town reflects its image; if the image is to improve, then the town's standards must also improve. Improving local facilities and amenities would encourage hospitality businesses in the area to invest more in existing plant and facilities.

While local authorities can do much to exhort and extol, this is also a national issue. A national tax and fiscal environment which encourages greater investment in existing properties would bring the greatest benefit. To this end, the abolition of the Hotel Building Allowance in 2008 inhibited the expansion plans of many individual owner operators – who comprise the bulk of the hotel industry – far more than those of development companies.

9. Skills

Local authorities have a major part to play in the provision of further and higher education colleges, many of which provide courses and training for the hospitality and tourism industry. There is no doubt that these colleges – many influenced and supported by local businesses – have provided a stream of well trained young talent for the industry over many years. However, in the present age of austerity, 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, so they are clearly important for local economies. However, the rising cost of transport is having an impact, certainly on the country's more remote regions, such as Scotland and the West Country, and will continue to do so in the future. Air transport links, too, are important. Scotland's successful air route development fund, which increased the development of new direct flights, needs to be replaced. At the same time, Scotland's rail system could be developed to be a visitor attraction in its own right – much as in Canada and Switzerland. Public private partnerships could do much to bring a positive influence to bear on these issues.

The rising cost of petrol and diesel, however, will have the most profound impact on these regions and, indeed, on holiday and business travel generally within the UK. Over three quarters of all holidays are taken by car. Local authorities must recognise that holiday-takers 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.

At a time when international competition is so strong and so all pervasive, every local economy in the UK is now competing on a world – not a local – stage.

9 Value of the hospitality industry to local economies

The value of hospitality to some areas of the country is critical. It is a major contributor to wages and profits in key tourism areas which are likely to have few alternative wealth-creating sectors, such as the Isles of Scilly, Lake District, coastal towns and remote areas of Scotland and Wales. Table 4 emphasises the importance of the industry to the UK's rural economy and shows that, without hospitality, these regions would offer very few alternative employment opportunities.

Table 4: **Hospitality GVA as a percentage of total GVA – top 20 local authorities.**

Rank	Local Authority	% of direct GVA to total GVA	% of direct, indirect and induced GVA to local GVA
1	Isles of Scilly	17.5	39.3
2	South Lakeland	11.3	22.9
3	Eden	10.6	21.9
4	Torbay	10.1	20.9
5	Kensington and Chelsea	10.0	17.5
6	Gwynedd	9.8	19.5
7	Conwy	9.5	18.4
8	Forest Heath	9.5	19.5
9	Weymouth and Portland	9.1	17.4
10	Scarborough	8.9	18.4
11	Highlands	8.8	19.1
12	Great Yarmouth	8.8	17.9
13	Moyle (NI)	8.7	19.1
14	East Lindsey	8.6	18.0
15	Blackpool	8.6	17.4
16	North Devon	8.0	15.8
17	Cornwall	7.7	16.9
18	Aygyll & Bute	7.7	16.7
19	Isle of Wight	7.5	14.8
20	Rother	7.5	14.8

Which areas earn the most from hospitality?

Looking at the contribution of the hospitality industry to total Gross Value Added – Table 5 – the top ranked areas are also predominantly major cities with Westminster, again, by far the biggest.

Table 5: **Direct hospitality GVA – top 20 local authorities**

Rank	Local Authority	GVA (£m 2005 prices)
1	Westminster	2,390
2	Camden	770
3	Birmingham	760
4	City of Edinburgh	660
5	City of Glasgow	630
6	Kensington and Chelsea	610
7	Manchester	570
8	City of London	520
9	Leeds	520
10	Cornwall	480
11	Hillingdon	450
12	Southwark	390
13	Liverpool	380
14	Islington	360
15	City of Bristol	350
16	Wiltshire	340
17	Tower Hamlets	340
18	Cardiff	320
19	Hammersmith and Fulham	319
20	Lambeth	310

Hospitality and Local Enterprise Partnerships 10

Hospitality is important to each of the 38 Local Enterprise Partnerships already established in terms of direct employment and direct GVA, as well as the percentage of each to the totals. In only one area is employment in hospitality less than six per cent of the total; in some areas, Cornwall and Cumbria for example, it is much higher.

As the economic development of these regions will be influenced by LEP activities, so will the growth of the hospitality industry in those areas be influenced for good or ill by LEP support or lack of it. It is for this reason that they will play such an important role in the future direction of the hospitality economy and of tourism generally to their area.

Maintaining overseas and domestic visitor numbers is the key to the economic prosperity of every local authority in the UK. But with more international destinations opening up, competition grows stronger every year and, as we have seen, price competitiveness is the weakest feature of UK tourism. So LEPs have a critical role to play in increasing visitor numbers by providing appropriate support for their Destination Management Organisations or other tourism agencies and by encouraging inward investment, upskilling the local population and ensuring that the industry remains a key growth sector in their local plan.

Here, as this report emphasises, hospitality is as critical to the economic success of rural and resort areas, which have traditionally been closely connected with tourism and holiday-taking, as it is to major cities such as London, Glasgow, Edinburgh, Birmingham and Manchester. Few industries can contribute so much to so many different areas of the country than hospitality – and could potentially contribute so much more.

The industry already has a proven track record of investment and job creation. Between 1998 and 2010, over 200,000 hospitality jobs were created. In almost the same timeframe, the BHA estimates that 1,100 hotels opened in the UK representing more than 110,000 rooms. Over 130 hotels are currently being built or are planned (40 in London alone). Not only major towns and cities but rural and resort areas, too, have benefited from this expansion. These hotels are at all price levels and in all styles and represent an investment, including refurbishments of existing properties, of some £25bn.

Nationwide investment has also continued apace in the restaurant sector; London is now regarded as one of the great eating-out capitals of the world, and high quality restaurants have opened up throughout the UK. Popular branded restaurants chains are appearing on an increasing number of High Streets.

Encouraging this investment in all the sectors of the industry, helping to ensure that it is sustained and developed by means of policies that create an environment which enables businesses to grow, is the challenge for the future.

Table 6: **Size and value of the hospitality industry in LEP regions**

	Direct employment	% total employment	Direct GVA (£m 2005 prices)	% total GVA
London Enterprise Partnership	396,500	8.4	10,000	4.3
Kent, Greater Essex and East Sussex	116,000	7.6	2,100	3.9
Leeds City region	98,900	7.1	1,500	3.3
Greater Manchester	93,200	7.4	1,500	3.6
Nottingham, Nottinghamshire, Derby and Derbyshire	73,000	7.6	1,200	3.5
North Eastern	70,800	8.4	1,100	3.9
Heart of the South West	68,900	8.4	1,200	5.0
Coast to Capital	68,500	8.3	1,400	4.5
South East Midlands	62,000	7.2	1,100	3.4
Solent	60,700	7.8	1,200	4.5
Birmingham and Solihull with East Staffs, Lichfield and Tamworth	58,900	7.9	1,200	4.7
New Anglia	58,900	7.9	1,100	4.3
Lancashire	53,700	7.9	900	4.1
Liverpool City Region	50,900	8.1	800	4.1
Sheffield City Region	48,300	7.0	700	3.2
Enterprise M3	46,500	7.3	1,000	3.8
Hertfordshire	44,100	7.6	900	3.7
West of England	41,200	7.0	800	3.4
York and North Yorkshire	40,900	9.7	600	5.2
Cheshire and Warrington	40,600	8.5	700	4.2
Thames Valley Berkshire	38,200	7.5	800	3.5
Coventry and Warwickshire	36,300	8.2	800	5.0
Stoke-on-Trent and Staffordshire	35,200	7.2	600	4.2
Leicester and Leicestershire	33,000	7.0	500	3.1
Dorset	32,300	9.0	600	5.3
Greater Cambridge and Greater Peterborough	29,900	6.7	600	3.4
Cornwall and Isles of Scilly	28,900	11.6	500	7.8
Oxfordshire City Region	28,700	7.9	600	4.2
Cumbria	28,300	11.0	500	6.8
Black Country	28,300	5.9	500	3.3
Humber	28,000	6.8	379	2.8
Swindon and Wiltshire	26,400	7.6	500	4.0
Lincolnshire	24,500	7.8	400	4.2
Northamptonshire	23,300	6.6	400	3.1
The Marches	22,800	6.9	400	4.6
Gloucestershire	21,200	7.1	400	3.8
Worcestershire	20,700	7.9	400	4.8
Tees Valley	20,400	7.3	300	3.1

Growth of hospitality jobs by 2020 11

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. It concluded that the industry has the opportunity to create 236,000 new jobs by 2015 and a further 239,000 throughout the country by 2020.

Table 7 shows the forecast growth in the total number of new jobs created in hospitality between 2010 and 2020 in the 20 local authority areas that will benefit the most. The results for all local authorities appear on pages 26-29.

The BHA believes that these numbers can be reached but only if national and local government removes the barriers to growth outlined in this report.

Table 7: **The top 20 local authorities in 2010 – and how they will grow by 2020.**

Rank	Local Authority	Direct employment	Employment change (2010-2020)	Employment 2020
1	Westminster	86,400	17,500	103,900
2	Birmingham	36,800	7,000	43,800
3	Glasgow City	35,400	6,900	42,300
4	City of Edinburgh	32,400	6,400	38,900
5	Manchester	31,100	6,000	37,100
6	Leeds	30,400	5,700	36,100
7	Cornwall	28,600	5,700	34,300
8	Camden	28,300	5,600	33,900
9	Liverpool	21,500	4,200	25,700
10	Kensington and Chelsea	21,100	4,500	25,600
11	City of London	20,400	3,800	24,300
12	Sheffield	19,600	3,700	23,300
13	Wiltshire	17,800	3,300	21,100
14	Newcastle-upon-Tyne	17,700	3,400	21,100
15	City of Bristol	17,700	3,300	21,000
16	Cardiff	17,200	3,400	20,600
17	City of Aberdeen	16,700	3,000	19,700
18	Hillingdon	16,500	3,000	19,500
19	Co Durham	16,200	3,000	19,200
20	Belfast	15,900	3,100	19,000

12 What of the future?

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

Support for the industry's growth from government, LEPs and local authorities, therefore, is essential if the industry is to reach its potential by generating new jobs and new wealth.

If policies that encourage growth, stimulate investment and help create jobs are introduced, and are then implemented and maintained, hospitality will be able to play an even more important role as the economic driver of local authorities than it has in the past. But these job-creation targets can only be reached if national and local government provides the right framework in which hospitality and the wider tourism industry can be sustained, nurtured and encouraged to grow.

The opportunity is there. We urge local authorities to grasp it so that every part of the UK can benefit.

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 make Northern Ireland's tourist industry, in particular, less competitive.

Table 8: 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.*

APPENDIX 2
The value of hospitality to local authorities

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

Table 9: Hospitality employment and GVA in local authorities

Region	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

Region	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	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
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

Region	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	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
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
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

Region	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	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
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

Region	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	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**
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

Region	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	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**
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**

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GREENHEAD HOUSE, SHEFFIELD
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GROSVENOR HOTEL, ILFRACOMBE
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JULIE'S, LONDON
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KAI OF MAYFAIR, LONDON
KENT HALL HOTEL LONDON
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KNAPPGARDEN & SOHO NORTH RESTAURANT, DALARNA, SWEDEN
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SALVO'S, LEEDS
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SIDMOUTH HOTELS, SIDMOUTH
SIENNA RESTAURANT, DORCHESTER
SILVERTSERVICE, DAVENTRY
SIMLA INN TANDOORI RESTAURANT, OLDHAM
SIMPLY SMART GROUP, WESTHAM
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SPAGHETTI HOUSE, LONDON
SPICE VALLEY, BOLTON
ST BRIDE'S HOTEL, SAUNDERSFOOT
ST IVES HOTEL & GUEST HOUSE ASSOCIATION
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ST JAMES'S CLUB, MANCHESTER
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STOW LODGE HOTEL, CHELTENHAM
STOWMARKET CATERING, SAXMUNDHAM
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THE FAT DUCK, BRAY
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THE GEORGIAN HOUSE, LONDON
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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
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THE OLD KINGS ARMS HOTEL, PEMBROKE
THE OLD RECTORY, BROSELEY
THE OLD VICARAGE HOTEL, AMBLESIDE
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THE PEARTREE AT PURTON, SWINDON
THE PENN CLUB, LONDON
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THE PIPE & GLASS INN, BEVERLEY
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THE PLOUGH INN, HOPE VALLEY
THE POLASH RESTAURANT, SOUTHEND-ON-SEA
THE RITZ HOTEL, LONDON
THE RITZ HOTEL RESTAURANT, LONDON
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THE ROYAL VICTORIA HOTEL, NEWPORT
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THE SHALIMAR, OLDHAM
THE SLOANE CLUB, LONDON
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THE WOODHOUSE HOTEL, LARGS
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THE ZETTER, LONDON
THIRD FORCE, UXBRIDGE
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UNILEVER BESTFOODS, LEATHERHEAD
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VEGAS HOTEL, LONDON
VENNELLS RESTAURANT, RIPON
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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

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