



Tourism and Hospitality Survey 2014

Executive Summary

Following the challenging economic environment of recent years the leisure and hospitality sectors experienced a period of despondency and uncertainty.

In May 2014 MHA conducted a survey to examine the key factors now affecting the leisure and hospitality sector in the UK in the recovery phase after a long recession.

The Approach:

We surveyed a national sample of over 150 Directors, Owner-managers and Chief Executives in the guest house, hotel, restaurant and pubs sectors. They were asked to share their observations and concerns about the industry in the past 12 months and their expectations for the next 12 months.

The results draw attention to four key areas:

- Zero hour contracts
- Investment
- Social media
- Green policies



Key Findings:

Zero hour contracts

Survey responses revealed that around one third of staff working in guest houses, hotels, restaurants and pubs are now employed on zero hours contracts. Despite the flexibility that this arrangement offers employers, well over 60% of these staff regularly work 20 hours or more – with more than three quarters of these routinely employed for 40 hours per week.

1/3

Investment

Almost a quarter of the operators covered by the survey look set to increase investment this year in premises refurbishment, while 16% will be spending more on marketing – particularly social media – to support business development.

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Social Media

Despite a 62% increase in the volume of online bookings for respondents in the past 12 months, 46% admitted they see little or no benefit in engagement with social media.

Those that are active on social media channels use social networks for loyalty schemes, responding to customer queries and brand building.

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Considering the year on year increase in the volume of bookings being made online, there is a surprising reluctance among a significant minority to embrace the opportunities which are available through social media.



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Green Policies

Survey responses revealed that although sustainability is not top of the agenda, this sector is Green conscious with 82% having environmental policies in place. That said, the vast majority expressed no plans to introduce energy efficiency measures such as solar panels or biomass boilers – and 40% were not aware of the tax breaks offered for such investments.



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Looking Ahead

Overall the survey findings report a brighter outlook for the tourism and leisure sectors in the UK.

Moreover with new government legislation surrounding zero hour contracts, further plans to improve the arrangement for both employers and employees and the increased Annual Investment Allowance now standing at £500,000 until December 2015 there is good reason for optimism for the future of the sector.

About MHA

MHA is a fast growing UK wide association of 9 like minded progressive and respected accountancy and business advisory firms. The 46 nationwide offices allow MHA to balance the national access and capability the association offers with the local insight and perspective that individual member firms offer their clients. MHA is able to assist with their clients' needs wherever they are in the UK as well as globally through our membership to Morison International.

MHA has worked with a wide range of companies in the Hospitality and Leisure sectors over many years. Clients are able to benefit from in depth sector knowledge in addition to specialist accountancy services and expert business advice.

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