

Hotel Market Leaders Rank & Profile UK 2008

**Hotel Industry 2004-2012, Hotels Ranking & Profiles, Industry Averages for
Sales, Profitability & Key Financials 2004-2012.**

June 2008

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Estimates Provided

In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

1. Introduction to Rank & Profile Reports

MTW Research *Rank and Profile* reports are designed to provide the reader with an independent, comprehensive overview of the current and recent trading conditions within their respective markets in an easy to use and easy to disseminate format.

Researched and collated by market research professionals who have been writing market reports on these sectors since 1999, MTW's *Rank and Profile* reports represent an excellent tool on which to base further company and market analysis or can simply be used to gain a greater understanding of the performance of your customers and competitors in recent years and how this compares with your company's performance and the overall industry.

This report enables the reader to undertake

- **Fast and Effective Customer or Competitor Analysis**

With the report providing an Industry Overview with industry sales totals, sales averages and forecasts to 2012; Ranking section; and a more detailed Profile section, the depth and range of analysis provides a comprehensive overview of the market's performance and estimated ranking for each company included in the report. Each company has a 1 page key financial indicators profile providing crucial competitor analysis on which to base further research and strategic decision making.

- **Market Size for Sales & Industry Value to 2012**

Market size for revenue and industry value is provided from 2004 through to 2012, enabling a fast understanding of the key trends in the industry and likely future prospects, facilitating strategic sales and marketing planning.

- **Benchmark & Monitor your Company's Performance against the Industry.**

3 years of the most recent accounts available, supported where appropriate by our own estimates, is supplied for each company enabling the reader to understand the position of your company in the market and gauge its performance against your competitors in recent years.

- **Turnover & Profit Estimates for Every Company**

MTW reports are unique in that we have provided an estimate for turnover and profit ranking for every company listed, enabling smaller and medium sized companies to gauge their market share, as well as the larger companies. Whilst we don't claim that every estimate we make is accurate, this will always be our aim.

- **Identify & Target the Most Relevant Potential Clients**

The report identifies the market leaders in the industry, and ranks them by sales, profitability and a number of other key performance indicators, enabling you to quickly identify and target the most relevant companies in the industry. The additional contact name and mailing details for each company provide the key to quickly increasing sales leads in this industry.

- **Monitor Your Customers' or Competitors' Performance.**

Key financial data are provided for every company listed for the last 3 years, enabling the reader to quickly and effectively track your competitor's performance in recent years, providing an excellent foundation on which to base further SWOT analysis to provide a comprehensive review of your competitive environment.

- **A Company Listing More Relevant to Your Market**

MTW Research have been researching and writing market reports since 1999 and as such we are able to develop a company listing which is more relevant to your chosen market, saving you time and money.

- **Identify and Assess Possible Acquisition Targets**

The ranking section of this report, coupled with the provision of key financial data such as assets, liabilities and net worth for the last 3 years in the Profiles section, enables the reader to quickly identify possible acquisition targets.

- **Save Your Company's Time & Money**

MTW's *Rank & Profile* reports don't bombard you with irrelevant financial data, they are designed to enable you to engage in fast and effective market and competitor analysis. We focus on providing what's important in an easy to reference and use format.

2. UK Hotel Market

2.1 Introduction to this Rank & Profile Report

In order to provide an easy to use tool for the basis of a market and customer / competitor analysis study, this report provides the following information:-

Hotel Market Overview 2004-2012

Overview of the industry's performance 2004-2007 and forecasts to 2012, including:-

- Total Industry Sales Turnover 2004-2012 & Key Trends
- Total Industry Profitability & Yearly Change
- Combined Industry Assets & Liabilities
- Total Industry Net Worth & Annual % Change Illustrations

Average Hotel Performance 2004-2012

A Profile of the 'Average' supplier in the industry, enabling effective and fast comparisons:-

- Average Supplier Revenue 2004-2012
- Average Supplier Profit Levels 2004-2012
- Average Assets & Liabilities 2004-2012
- Average Net Worth 2004-2012
- Average Value of Sales per Employee 2004-2012

Hotel Ranking

Provided for the leading companies in tabular format:-

- By Turnover & Individual Sales Revenue Estimates for 2007
- By Profit
- By Total, Combined Assets
- By Net Worth
- By Number of Employees

Hotel Profile

Financial data and estimates provided for the last 3 years of trading for every company:-

- Turnover & Profit estimates for every company listed for 2007
- Debtors Value (i.e. money owed to company each year over the last 3 years)
- Fixed Assets (e.g value of land, buildings, vehicles, equipment etc)
- Current Assets (i.e cash & other assets to be sold within 1 year)
- Current Liabilities (i.e debts or obligations due in 1 year)
- Long Term Liabilities (i.e debts or obligations which extend beyond 1 year)
- Net Worth (i.e total assets less total liabilities)
- Brief Description of Activities
- Full Registered Address & Postcode
- Incorporation Date
- Ultimate Holding Company & Parent Company (if applicable)
- Number of Employees (estimates given where no data exists from Companies House)
- Registered Company Address & postcode
- Senior Decision Maker / Director Contact Name

Also provided as part of the "Ultimate Pack" is a comprehensive multi-use mailing and telemarketing list with comprehensive financial spreadsheet including key financial data for the industry.

2.2 Hotels Competitor Listing

The following table provides a listing of the companies which are included, and for the purposes of this report, defined as 'the industry'.

Figure 1: Hotels Market Listing

Accor UK Ltd	Falmouth Beach Resort Hotel Ltd	Morgans Hotel
Almondsbury Interchange Hotel Ltd	Fawsley Hall Hotel	My Hotel Ltd
Apex Hotels Ltd	Firmdale Hotels Plc	New Forest Hotels Plc
Armathwaite Hall Hotel	Folio Hotels Ltd	Old Thorns Hotel Golf & Country
Arnewood Estates Ltd	Four Pillars Hotels	Palace Hotel
Arundel House Hotel	George Washington Golf & Country	Park Avenue Hotel Ltd
Audley Hotels & Resorts Europe Ltd	Gibbon Bridge	Parkwater Hotel
Bagden Hall Hotel Ltd	Greenclose Ltd	Paten Co.Ltd
Baglioni Hotel	Guoman Hotels Limited	Ponsmere Hotel
Bannatyne Hotels Ltd	Hart Hotels Ltd	Premier Inn Hotels Limited
Barnham Broom Hotel	Hawkstone Park	QMH UK Ltd
Barnsdale Lodge	Headland Hotel	Ravenwood Hall Hotel
Bedford Lodge Hotel	Heritage Hotels	Real Hotel Company Plc
Belsize Park Hotel Ltd	Heronston Hotel	Reeds Hotel
Blunsdon House Hotel	Hilton International Hotels (UK) Ltd	Royal Chace Hotel
Braid Hills Hotel	Hope Street Hotel	Scarisbrick Hotel
Briars Hall Hotel	Huntsbridge Ltd	Seaham Hall
Britannia Hotels	Hurst House Farm	Shendish Manor
Brook Hotels Ltd	Hyatt Regency Birmingham	SLC Turnberry Ltd
Brown's Hotel	Imperial London Hotels Ltd	Somerset Bayswater
Bruce Taverns Ltd	Intercontinental Hotels Group plc	St Giles Hotel
Budock Vean Hotel	Jarvis Hotels Ltd	Station Hotel
Bush Hall Hotel	Jesmond Dene House	Stonefield Castle Group
Castlecary House Hotel	Jonathans Hotel	Strathmore Hotels
Cedar Court Hotel	Jurys Doyle Hotel	Swinton Park Ltd
Chichester Park Hotel	Kanta Enterprises Ltd	The Bentley Hotel
Chilworth Manor Hotel & Conference	Killyhevlin Hotel	The Boars Head Hotel
Choice Hotels	Lady Anne Middletons Hotel	The Capital Group
Cliff Head Hotel	Lancaster Hall Hotel	The Cooden Beach Hotel
Close House Country Club	Lindum Hotel Ltd	The Hotel At Chelsea
Cola Holdings Ltd	London Bridge Hotel	The Master Builder's House Hotel
Compass Hotels Ltd	Macdonald Hotels	The Vineyard At Stockcross
Corus Hotels Plc	Majestic Hotel	Three Horseshoes Inn
Cotswold Inns & Hotels Ltd	Malmaison	Thurlestone Hotel
Danesfield House Hotel	Malmaison Oxford Ltd	Travelodge Hotels Ltd
Days Inn	Mandarin Oriental Hyde Park	Treglos
De Vere Group Plc	Marsham Court Hotel Ltd	West Retford Hotel
Donnington Valley Group	Maryculter House Hotel	Westerwood Hotel
Durrants Hotel	Menzies Hotels Ltd	Wroxall Abbey Estates
Eastwell Manor Hotel	Millennium & Copthorne Hotels Plc	
English Lakes Hotels Ltd	Moor Hall Hotel	

Source: MTW Research

Whilst we endeavour to ensure that the majority of the major companies are included, it should be noted that the list of companies included in this report is not exhaustive and the inclusion or otherwise of a company in this report does not necessarily reflect a company's relevance in the market.

2.3 Hotels Market Performance 2004-2012

The following section illustrates the overall, combined performance of the leading Hotels in terms of revenue, profit, assets, liabilities and net worth.

2.3.1 Hotels Sales Revenue 2004-2012

The following table illustrates the performance of the selected Hotels, with a turnover in excess of £2 million, in terms of combined revenues between 2004 and 2007 and forecasts to 2012:-

2.4 Average Hotels' Sales Performance 2004-2012

The following section illustrates the average performance of the selected Hotels in terms of revenue, profit, assets, liabilities and net worth.

2.4.1 Hotels Average Sales Revenue 2004-2012

The following table illustrates the average sales revenue of Hotels since 2004 and forecasts to 2012:-

3. Hotels Rankings

3.2 Hotel Sales Estimates & Turnover Ranking 2007

3.2.1 Hotels Ranking by Turnover - 2007

The following table illustrates our estimates of the rank by turnover for each of the selected hotels in 2007:-

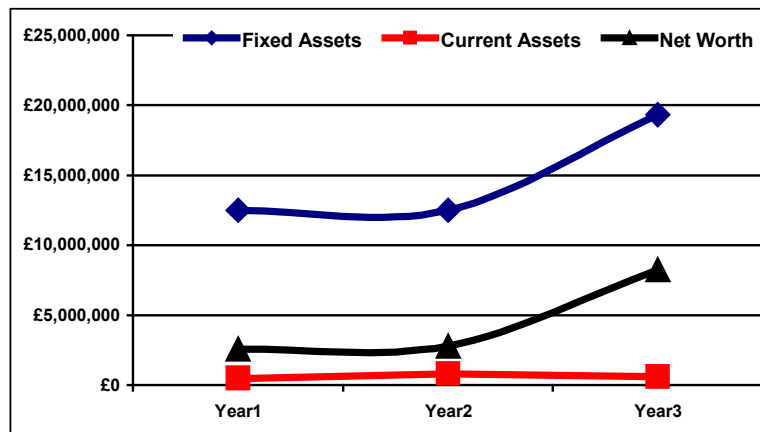
Table 23: Ranking by Turnover 2007 - Hotels

4. Hotels Profiles

Sample Company - Company Overview & 'At a Glance'

Sample Address
Sample Address
Postcode

Sample Company is a private limited with share capital company, incorporated on January 27, 1988. The company's main activities are recorded by Companies House as "Hotels and motels, with restaurant". The company is estimated to employ approximately xx employees in 2008.



To year end 31/03/2007, Sample Company is indicated to have achieved a turnover of around £xx million. Due to reporting implications, the top line figures presented for this company are estimates and should be regarded as such.

The following table briefly provides a top line overview on Sample Company:-

Company Name	Sample Company
Brief Description of Activities	Hotels and motels, with restaurant
Parent Company	Sample Company
Ultimate Holding Company	Sample Company
Estimated Number of Employees	xxx
Senior Decision Maker / Director	Sample Name

The following table illustrates the company's key performance indicators for the last 3 years:-

Sample Company- KPIs for Year Ending 31/03/2005 to 31/03/2007

Key Indicator	Year Ending 31/03/2005	Year Ending 31/03/2006	Year Ending 31/03/2007
Debtors	£262,000	£579,000	£593,000
Fixed Assets	£12,505,000	£12,504,000	£19,322,000
Current Assets	£453,000	£799,000	£593,000
Current Liabilities	£1,489,000	£1,868,000	£11,685,000
Long Term Liabilities	£8,892,000	£8,648,000	£0
Net Worth	£2,577,000	£2,787,000	£8,230,000