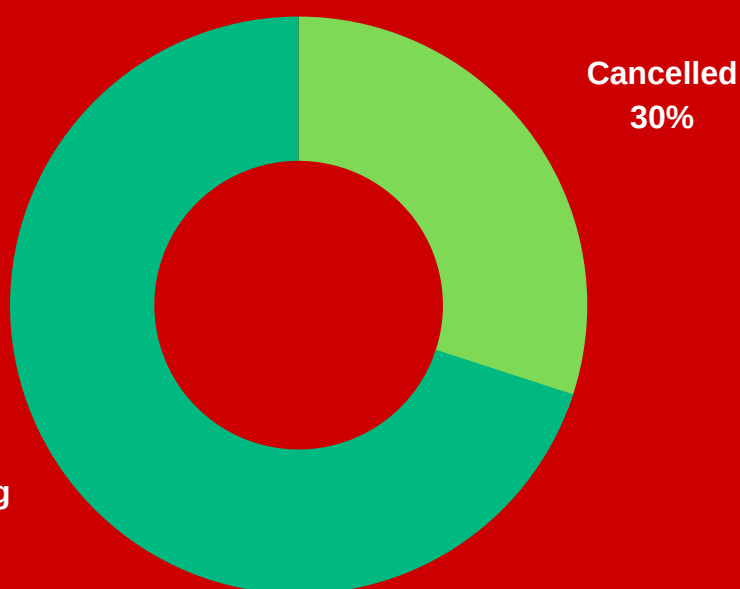


Tier 2 hospitality changes/ forecast

source: Lumina Intelligence 2020

Over 30% of
bookings
cancelled

Remaining
70%



Employer
pays 4%



source: ResolutionFoundation

UK eating out
market will not
fully recover the
value lost until
2023