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Edited by Paul Charity



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PREMIUM CLUB: OPINION

Fri 18th Oct 2024 - Premium Opinion

Hawksmoor chief growth and culture officer Ceri Gott explains the HR successes at the award-winning steak restaurant business while Teddy Shaw, managing director of investment bank Houlihan Lokey, looks at the North American experiential leisure market. Meanwhile, sector investor Luke Johnson offers his solution to the challenges facing the sector, while Flo Graham-Dixon, founder of sector advisory business Juniper Strategy, examines the rise of social media sensation TopJaw. Premium Diary includes Slim Chickens, TGI Fridays, Marston's, Gordon Ramsay



Why HR leaders are the financial engines and brain surgeons of our businesses by Ceri Gott

Twelve years ago, I received a call from my brother, Huw Gott, inviting me to work with him and his best friend, Will Beckett. They had taken over a small kebab shop in Spitalfields and opened Hawksmoor, a

restaurant with a simple ambition: to serve brilliantly sourced ingredients, cooked perfectly, in a comfortable environment, where guests could relax and enjoy themselves.

Their ambition was to one day make it the best in the world. They wanted to make it the best restaurant to work for because they believed that if we got the people bit right – if people enjoyed working here – then the rest would fall into place. Customers would have an amazing time, tell their friends and come back, and profit would follow.

I was a government economist at the time, a national expert on labour productivity. My experience felt worlds apart from hospitality, and I wasn't quite sure how these two worlds would combine. I drew inspiration from "Funky Business", a book that emphasises bringing together diverse perspectives to generate business innovation and growth.

Bringing my expertise together with Hawksmoor's simple ambition and culture seems to have been a recipe for success. Hawksmoor has been ranked a top 100 company to work for in 12 consecutive years and was the first restaurant to become a B Corp, while growing internationally to 13 restaurants. A few years ago, it was named the best steak restaurant in the world.

In 2021, we were asked by Strathclyde Business School to take part in a study funded by the Scottish government. It was looking for companies with a reputation for having great HR practices and great financial performances to extract lessons to help other companies build back better after covid.

Building on this, I recognise four features at Hawksmoor that help us to attract, develop, retain and motivate people, and also drive productivity. Productivity is how much we get done in a day's work. If we boost it by "working smarter", we can get more done in less time, which is good for people and good for business.

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“Work hard and kindness to people” is a core value at Hawksmoor.

Kindness is crucial, our brains are wired to scan for threats, and if someone is rude or aggressive, part of our brain activity is diverted to sift over this negative experience. So, in short, the productive ability of our brain shrinks. Research shows that even witnessing or experiencing rudeness hinders performance and problem-solving skills.

On the flip side, companies with management teams with higher emotional intelligence scores have been shown to have higher customer satisfaction scores and profitability – they make more money. Acts of kindness also stimulate our immune systems, making us healthier. Emotional intelligence and kindness are not just nice traits, they lead to tangible business results. One small act of kindness can create a ripple effect, positively impacting hundreds of people within an organisation.

Listen to innovate

Hospitality is fundamentally a people business. In a people business, one of the biggest sources of innovation is how people organise themselves and the small changes they make to do their day-to-day jobs faster or better. From our involvement with the Strathclyde study, we learnt that the people who improve their efficiency are the ones who feel they can be the change they want to see – that they have the permission and ability to make small changes to improve their job.

Those who felt empowered to innovate were typically those who felt heard by their managers and received constructive feedback and support. If we all spent a little more time listening to people, just think how many changes our teams might identify to get more out of their shift.

Learn, learn, learn

Research indicates that a third of productivity growth in the past two decades is attributable to skills enhancement. At Hawksmoor, we have a wealth of learning available in our training menu, from creating the perfect cocktail to delivering incredible hospitality to our five-stage



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management development programme. It sets out the training employees get at every step of their journey, from waiter to general manager or commis to head chef. The message is clear from day one: stay, develop and build a great career with us.

Welcome everybody

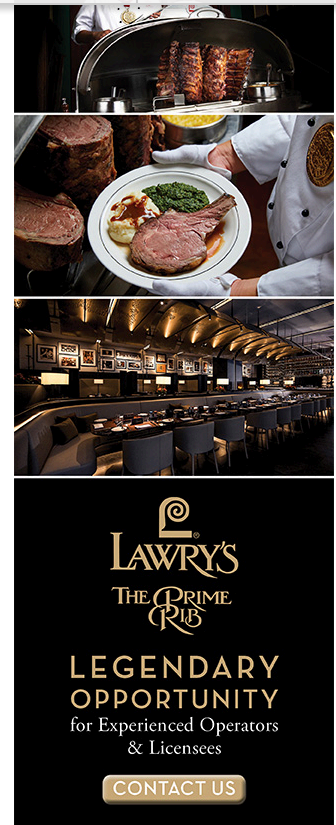
At Hawksmoor, we foster a culture where people can feel comfortable being themselves, from expressing their individuality by wearing their own clothes to speaking about mental health, women's safety, neurodiversity and tackling racism. Creating an inclusive environment is not only the right thing to do, it also enhances productivity. Hiding is mentally exhausting, so it's not surprising that research has found that it reduces people's ability to be productive. So, welcoming everyone attracts a bigger pool of people to apply for your jobs, and supporting them to be themselves supports both individual and business growth.

I have been known to say that HR is "not exactly brain surgery", but I've stopped saying that. I'll leave you with two of the most striking things I learnt from professor Colin Lindsay, who led the Strathclyde University study we were part of. The first is that there is a lot of evidence that good people practices drive innovation and productivity across the board. The second is evidence suggests that people who work in companies with good people practices have better health outcomes and live longer.

Emotional intelligence, diversity, equity and inclusion and people management can be seen as soft fluffy things, but they drive hard numbers. Great HR and people managers are both the financial engines and the brain surgeons of our companies, and their influence shapes our organisational success, ensuring that we thrive in a competitive landscape.

Ceri Gott is chief growth and culture officer at award-winning steak restaurant business Hawksmoor

All to play for by Teddy Shaw



The influx of UK based experiential leisure companies into the North American market is garnering significant attention, sparking conversations around potential growth and competition. Companies such as Flight Club and Swingers are emblematic of this trend, entering a market that, from a UK perspective, appears ripe for innovation. The belief is that US operators have lagged behind in responding to consumers' growing desire for experiential leisure and competitive socialising concepts. However, this assumption requires a closer examination.

Historically, the entire out-of-home entertainment sector, not just in North America but globally, has been slow to innovate. Until recently, the experience at a local family entertainment centre or regional theme park was remarkably similar to what it was decades ago. Companies like Chuck E Cheese were still using paper tickets for arcade rewards as recently as five years ago (and tremendous credit to David McKillips and the team at CEC Entertainment for all the impressive updates to their business, which today looks nothing like it did before his arrival). This reflects an industry-wide sluggishness in adopting new technologies. However, things are changing. Innovations such as game cards, cashless systems and player tracking have become more common, signalling a shift towards a more technologically advanced and user-friendly landscape.

One of the most transformative innovations in the North American arcade and amusement industry has been the introduction of player cards and the concept of credits versus direct cash payments. This small shift has had a profound impact on consumer behaviour, encouraging more frequent and spontaneous spending. But these surface-level innovations are only part of the story. The real excitement lies in new concepts that add a social dimension, be it teamwork or competition, an element that is more appealing to customers, especially in a post-pandemic world where shared experiences are highly sought after.

The question that remains, however, is which of these experiential concepts will endure and which are fleeting trends. Most new



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entertainment offerings experience an initial surge in interest, but sustaining that momentum is the real challenge. For many operators and investors, repeatability is key. Are these experiences engaging enough to draw customers back again and again? For example, while concepts like Flight Club or Electric Shuffle are intriguing, their long-term viability might be questionable unless they can be integrated into diversified entertainment complexes that offer multiple activities such as bowling, karting or virtual reality. Andretti Indoor Karting & Games has witnessed strong and sustained success through its diversified offering model.


The influx of UK concepts into the US market is noteworthy, but it is important to recognise that many of these companies come from the same developers and often leverage established brands or intellectual property (IP) to gain traction. It is difficult to launch a successful out-of-home entertainment venture in the US without a recognisable brand or IP. The biggest names in the US sector – such as Disney, Dave & Buster's and Topgolf – either have deep-rooted histories, include well-known brands or were imported from abroad. This points to a competitive market that is not as “behind the curve” as some may believe, with numerous US-based concepts like Punch Bowl Social, The Escape Game and SPIN in the experiential leisure space mix.


Investment in experiential leisure has surged post-covid-19, driven by pent-up consumer demand for experiences over material goods. This shift in consumer preference has attracted a wave of private equity interest, as many traditional retail sectors have struggled. Private equity firms that previously had no presence in this space are now closing significant deals, a testament to the sector's growing appeal. Recent M&A activity, such as the sale of Five Star Parks & Attractions to Court Square Capital and OpenGate Capital's acquisition of Player One Amusement Group, underscores this interest. However, while M&A activity in the experiential leisure space has been vibrant, recent market conditions have led to a partial slowdown, not because of interest or viability, but because performance trends and valuation dislocations have created challenges for buyers and sellers to reach agreements.

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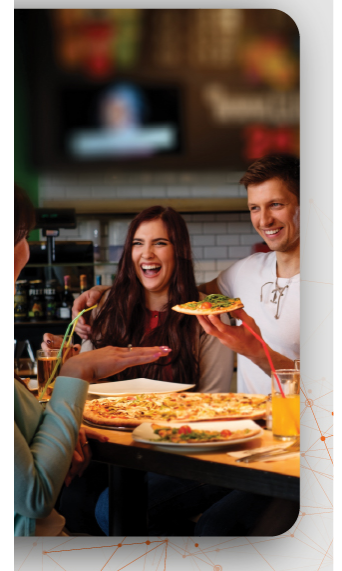
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One of the defining characteristics of the North American experiential leisure market is its fragmentation. The sector is populated by numerous subscale operators, particularly in family entertainment centres, where many businesses are family-owned with only a handful of locations. These small-scale operations are often not attractive to middle-market private equity firms or strategic investors due to their size, but consolidation could unlock significant value. A prime example is the Five Star Parks platform built by Fruition Partners, which successfully executed a roll-up strategy in the family entertainment centre space, creating a scaled asset attractive enough to secure a majority recapitalisation deal.

The potential for further consolidation, particularly in the “eatertainment” space, is high. Many smaller operators are currently struggling to sustain and grow profitability independently, but through strategic combinations, these companies could benefit from cost synergies and increased purchasing power. This consolidation could also provide revenue synergies by allowing companies to cross-promote their brands and cater to a wider demographic, from value-driven consumers to those seeking premium experiences.

The rising cost of living, or inflationary pressures, is another challenge for operators in both the UK and North America. In response, many operators have raised prices over the past few years but are now finding it difficult to continue doing so. Rather than reducing prices outright, businesses are using promotions, memberships and other strategies to enhance perceived value. This balancing act between pricing and value is critical to maintaining consumer interest.

The experiential leisure market offers broad appeal across income brackets and other demographics. Operators like Dave & Buster’s and Bowlero/Lucky Strike cater to a wide demographic by offering both high-end experiences and value-driven promotions. Meanwhile, operators like Chuck E Cheese, Museum of Illusions and Dolly Parton’s Stampede Dinner Attraction appeal to consumers of all ages and backgrounds, creating a larger customer pool to draw upon. This



ability to appeal to a broad audience is crucial for operators, as focusing on a narrow segment could limit growth opportunities.

In conclusion, the North American experiential leisure market is undergoing significant transformation and growth. While UK-based companies are making their mark, the US market is far from stagnant, with numerous homegrown innovators driving the sector forward. Investment interest remains strong, and the sector is ripe for consolidation. As we navigate this dynamic landscape, the key for operators and investors alike will be ensuring long-term repeatability and value for consumers while balancing the challenges of inflation and market fragmentation.

Teddy Shaw is managing director of Houlihan Lokey's out-of-home entertainment practice

We need more parties by Luke Johnson

For the hospitality industry, the last five years have felt like a war of attrition. Two years of lockdowns and covid have been followed by almost three years of inflation and a cost-of-living crisis. It's enough to make one doubt the future of our wonderful profession. However, I have a solution: more parties.

Humans are social animals. We love to gather and celebrate. Eating and drinking are almost invariably involved in such events, as are dancing and entertainment. These festivities have been taking place since time began – an essential part of what makes life worth living. Parties are a vital way societies congregate – to embrace friends, to remember important milestones and to forge new friendships. They often represent the happiest moments of our lives – birthdays, anniversaries and marriages. Laughing, feasting and dancing with loved ones – these are the very essence of life.

Unfortunately, there haven't been enough parties in recent times. People were afraid to go out, they became addicted to sitting at home scrolling on digital screens, losing touch with their companions, and too

many have forgotten the joy of the party. In truth, the country feels pretty depressed.

My prescription for this social malaise is clear: more parties of every description that will help cheer us up. I think they are the summit of human pleasure: they combine friendship, romance, music, food, drink and plenty of singing, dancing and jokes. The anticipation of an evening of glittering company, amusing conversation, delectable food and drink – what could be more exciting?

The hospitality trade can revive itself and the country by hosting many more such gatherings. Pubs, restaurants, hotels, amusement venues and nightclubs are purpose built to satisfy this demand. We need to encourage our customers to find any excuse to throw a party. Wakes, weddings, retirements, divorces, a new job, a new home, New Year's Eve, Guy Fawkes, Christmas, Halloween, product launches, new business launches – there are a thousand justifications for a social gathering to toast something or other.

I have been throwing parties several times a year for at least 40 years and have no intention of slowing down now. From Brighton Palace Pier to St Thomas' Hospital via The London Library and the Copacabana Club in Hollywood, I have hosted every sort of bash. From semi-legal raves on Fulham Wharf in the 1980s to refined soirees at The Ivy, they have all been fun. Parties are about being generous, showing off, living in the moment and commemorating the victories.

In many respects, my entire career stems from holding student parties at Scamps nightclub in Oxford as an undergraduate of 18 and enjoying the buzz of organising guests, music and intoxicating beverages into a compelling cocktail. My subsequent business adventures in bars, restaurants, hotels, bakeries, travel and various other branches of the hospitality sector all started when I became a party host.

Remote working and online dating are all very well, but they are no substitute for the genuine bonds and serendipity of meeting people in real life. Isolation, fragmentation and loneliness have grown since

lockdowns and research indicates that such disconnection is deeply unhealthy. Parties break down barriers and lift the world's spirits. And this is where Propel readers come in. We make parties happen – with premises, welcoming staff, delicious meals and drinks, wild entertainment and fabulous music.

To further promote this mission, I have written a short book with a co-author (Graeme Boyd) called “Throwing Parties – A Guide to Being a Great Host”. I am sure all serious operators in the licensed and catering trades won't need its advice, but you might find it amusing in places. It covers issues like finding a location, the art of party conversation, food and drink choices, music, children's parties, dinner parties and various other topics.

I hope that in a small way, this book encourages members of the public to take the plunge and throw a party. One critical point I make is that too many people feel they need a very specific, occasional reason to hold a party: a birthday, an engagement, a stag do, a graduation and so forth.

I disagree – why be so conventional? Just throw a party at any time of the year for the sheer exhilaration of being alive, to catch up with old pals, to make new acquaintances and to remind ourselves that we all “walk through the valley of the shadow of death”, as the Lord's Prayer says. Hence, we need to make the most of our all too brief time on earth and plan another party!

Luke Johnson is a sector investor. His book is published by John Wilkes Publishing and available [here](#).

The rise of TopJaw – shaping the UK's dining scene by Flo Graham-Dixon

Where do the best chefs, food critics and celebrities like to eat? Who does the best roast? The best burger? The best pizza? Social media sensation TopJaw has all answers. And on what better authority than the likes of Grace Dent, Michel Roux Jnr and Jason Atherton, to name but a few. Having looked through its last 75 “Best of London”

interviews, the most mentioned overall restaurants include The Devonshire, Chichard, St John's, Bouchon Racine, Hilds and The River Café. Bleecker wins burgers and Mozza wins pizza, but PizzaExpress is best if you ask Jay Rayner or Marcus Wareing. Top Jaw's catchy interview format has taken the UK by storm and built up a following of more than one million across Instagram, TikTok and YouTube.

From its origins in longer-form 20-minute city guide clips on YouTube, TopJaw pivoted towards snackable, short-form videos that resonate with generation TikTok and beyond. Its "best of" series have been particularly successful, catapulting lesser-known establishments into the limelight as well as celebrating much loved classics. One example is Donia, a small Filipino restaurant in London that saw its Instagram following spike by more than 50% after it was featured (as reported by the Financial Times). TopJaw's "best of" series is viral by nature – restaurants are tagged and then often interviewed themselves. Beyond the format, its success lies in its information (giving an insider's edge on where to eat), its high-profile guests – each exposing their following to TopJaw, its up-beat feel, its cheeky chappy presenters and its much-needed authenticity. This is the restaurant world's version of a peer review – it's where those in the know – those who have dedicated their careers to food – recommend. Mentions cannot be bought – unless you are Deliveroo, which sponsors a "best of Deliveroo" edition, designed to highlight the most deserving restaurants on its platform.

In an age where food culture is increasingly shaped by social media, it's interesting to note the TopJaw collaboration with the Step: Your World app a year ago. In essence, Step offers digital maps of curated restaurants, shops and cultural experiences. A way for tastemakers to monetise their recommendations, users pay a subscription fee and can see all tagged locations on an interactive map. As a recent subscriber myself, I can say it makes it much easier to remember relevant recommendations at the right time and place or discover new cities. While apps like this are nothing new – Google has had a similar function for a long time – Step: Your World has an enviable list of "curators" across food, fashion and culture, and a glossy interface that is nice to look at and easy to use. Alongside TopJaw is Service 95 (Dua

... (social platforms for alcohol recommendations) and a host of painfully cool models, DJs, creatives and food stylists. It's still early days, but TopJaw has just shy of 8,500 subscribers, which at £30 per year, represent a quarter of a million revenue going through the app in year one and plenty of room to grow. The app now has 220,000 users, up from 50,000 in 2021.

In the long-term, if peer-to-peer platforms like this improve and grow, it may start a quiet revolution in how consumers choose restaurants. The Step: Your World proposition sits somewhere between Monocle and TripAdvisor. Compared with traditional review sites, recommendations are curated, and it circumvents issues around fake reviews or the fact that some people are more easily pleased than others (I have learnt to take reviews of vegetarian or vegan restaurants with a pinch of salt, since a segment of customers are just grateful to be catered to). On the other hand, it's harder to keep recommendations up to date if somewhere goes downhill since it is not based on a continuous sample of visits. Compared with Monocle, it doesn't yet cover as many cities, but again there is the advantage of the map and interactive app, where you can save which pins you like as well as pick and choose which "curators" to follow.

Should TopJaw continue to build influence, the winners will be those who meaningfully engage with the hospitality industry itself. By leveraging platforms like Code, which allows hospitality workers to visit establishments with certain benefits, restaurants can foster that community. Additionally, being recognised as a good employer will encourage teams to talk positively about your brand, and given the transitory nature of hospitality jobs, word quickly gets around. Another clever way to engage the community is through mash ups and collaborations. Examples include Pho X Doh Hut, Pizza Pilgrims' guest specials and the Quo Vadis "& friends" series featuring famous chefs and restaurants for ticketed events. Ultimately though, the dining experience will have to deliver to the most discerning critics – those who live and breathe the industry. By getting those people through the door and ensuring they leave impressed, restaurants can harness the power of peer-to-peer recommendations.

So, what does the rise of TopJaw signal for the future? One thing that stands out from the way that artificial intelligence (AI) and algorithms increasingly shape what we see, eat and recommend is that algorithms feed us content that aligns with our past preferences (after researching this piece, TopJaw is consistently the first thing that comes up on my “for you” page). These algorithms push us toward culinary choices that reinforce our established tastes, creating personalised yet potentially narrow echo chambers. While TopJaw succeeds in breaking through this bubble by featuring diverse voices and fresh perspectives, it’s easy to envision a future where AI completely curates our dining experiences. Machine learning could eventually predict and recommend the “perfect” restaurant for any occasion, based on our preferences, location, diet or mood.

For restaurant businesses, this shift has significant implications. As AI-driven recommendations become more powerful, the establishments that thrive will be those that understand how to engage these algorithms effectively. Savvy digital marketing, a strong social media presence and strategic collaborations will be essential tools for staying visible. Restaurants that harness the power of social media while maintaining authenticity will have a distinct competitive advantage.

Flo Graham-Dixon is founder of Juniper Strategy, which advises operators and investors on due diligence, growth strategy, scalability, location planning, international expansion, channel diversification and food and beverage vision

Premium Diary

Finding a prime place to roost: Boparan Restaurant Group (BRG), the owner of the Gourmet Burger Kitchen, Carluccio’s and Giraffe brands, first introduced the US brand Slim Chickens into the UK in 2018, with an opening in St James Street in London’s Marylebone. The group has since grown the brand into a circa 55-strong business in the UK through a mixture of company-owned and franchised openings. Indeed, earlier this month, Slim Chickens franchisee KK Restaurants opened the brand’s first UK drive-thru, and its first outside the States,

Germany this year and recently penned a deal to launch Slim Chickens in Poland. BRG also recently revealed to Propel that it has a 24-month development pipeline for Slim Chickens in the UK. Diary hears that as part of that pipeline BRG has also lined up an international flagship site, in central London. BRG is understood to have secured the former Maison Du Mezze site in Leicester Square.

In a state in the States: Earlier this month, the owners of D&D London and Vinoteca completed a deal to acquire TGI Fridays, securing more than 2,000 jobs. Breal Capital and Calveton, which acquired D&D London last year, acquired TGI Fridays through a new vehicle, the Liberty Bar and Restaurant Group. The deal will see TGI Fridays continue to operate across the UK from 51 of its 87 restaurants. The company said it is also hopeful that it may be able to secure further locations following discussions with the landlords. The deal came after former owner Hostmore abandoned plans to merge the UK business with its US counterpart. However, it seems that things across the Pond remain unstable for the brand. In the US, TGI Fridays closed 36 locations in January because they were “underperforming”. The company’s restructuring efforts included selling eight locations that were corporate owned to its former chief executive, Ray Blanchette. A further seven restaurants closed in May. Diary now hears that the brand has closed 12 more sites in the US. “We’ve identified opportunities to optimise and streamline our operations to ensure we are best positioned to meet — and exceed — on that brand promise,” TGI Fridays chief operating officer Ray Risley previously said in a press release. “By strengthening our franchise model and closing underperforming stores we are creating an unprecedented opportunity for Fridays to drive forward its vision for the future.” The closures mean that TGI Fridays have circa 215 sites left in the US.

Another member of the family: Earlier this week, Marston’s announced that it sees the opportunity for five differentiated pub formats across its circa 1,340-strong estate, as it looks to drive a “high-margin, highly cash-generative local pub company” with the purpose of “shared good times”. The formats are “locals”, “locals sport pub”, “adult

...dining pub, "family pub" and the "two-room pub". As previously flagged up by Diary, the name Woody's Family Pub had been lined up as a possible name for the "family pub" category, which will be aimed at families with primary school children and will have an 18% indicative share of the estate. However, Diary understands that Marston's hasn't, as yet, completely decided on the right name for this category and may use others or multiple names. It understands that a variation of the name already put forward – Woody's Family Pub & Kitchen is also in the mix, as is Albie's Family Pub & Kitchen.

Moving chairs: Next February, chef Gordon Ramsay will open five new restaurants and bars at the top of 22 Bishopsgate, the UK's tallest office building, in the City of London. The 60th floor of the building will have a 14-seat chef's table called High, run by the team from Ramsay's three-Michelin-starred Chelsea restaurant, Restaurant Gordon Ramsay. There will also be a Lucky Cat restaurant, a Lucky Cat terrace bar on the top floor with a Japanese garden and a Bread Street Kitchen on the 59th floor below. The chef is also opening a cookery school, The Gordon Ramsay Academy, in the building. In a recent interview with the Robb Report, Ramsay gave some more detail about the thought process behind getting involved in the development. "The first time walking through that building was just breathtaking," he says. "I could see as far as Oxford. There were helicopters below us, the Gherkin was below us, and I saw an opportunity like no tomorrow. We started off on the extreme left-hand side, overlooking Tower Bridge, with Gordon Ramsay High. There's this 12-seat table that has just the best view in the world, and an open-plan kitchen. You'll arrive, you'll mingle with the chefs, you'll see the canapés put together, and it's live...that experience is going to go on for three to three and a half hours." While Diary awaits to see all the new sites at 22 Bishopsgate, it hears that Ramsay has also been making changes to the management team of his eponymous restaurant business. The company has hired Jacob Jull, formerly of Liberty and The Entertainer, as its new finance director, and Jay James, recently of Rosa's Thai, and before that, Prezzo and Pret A Manger, as its new UK marketing director.

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