

# 2018 | 2019 HOTREC ANNUAL REPORT



# CONTENTS



- 03 Foreword by Mrs. Elżbieta Bieńkowska, Commissioner for Internal Market, Industry, Entrepreneurship and SMEs
- 05 Message from Mr. Jens Zimmer Christensen, President of HOTREC, and Mr. Christian de Barrin, Chief Executive Officer of HOTREC
- 06 Core policy achievements and activities
- 15 Core events
- 18 Global hospitality talents – HOTELCAREER recruiting insights
- 20 2018 hotel results across Europe, by MKG group
- 22 2018 key figures for restaurants and bars in selected European countries
- 24 Meet the Team and the Executive Committee
- 25 Access the HOTREC Membership

## VISION

Hospitality is at the heart of European tourism development by fostering the industry's growth, jobs and innovation and by unlocking its potential.

## MISSION

HOTREC is the umbrella Association of Hotels, Restaurants, Bars and Cafés and similar establishments in Europe, which brings together 43 National Associations in 31 countries, and is the voice of the hospitality industry in Europe. HOTREC's mission is to:

- Represent and champion its interests towards the EU and international institutions, as well as to all kind of relevant stakeholders;
- Foster knowledge sharing and best practices among its Members, in order to further promote innovation;
- Act as a platform of expertise for the European hospitality industry.



Visit our new website: [www.hotrec.eu](http://www.hotrec.eu) !



# FOREWORD BY MRS. ELŻBIETA BIEŃKOWSKA, COMMISSIONER FOR INTERNAL MARKET, INDUSTRY, ENTREPRENEURSHIP AND SMES



*"Let me thank again HOTREC for its constructive and proactive cooperation during the past years and its active involvement in shaping the policy agenda for EU tourism"*

Dear Readers,

Over the last four and a half years, I have had the pleasure of covering tourism as part of my portfolio as European Commissioner. I say 'pleasure' because the EU's tourism industry plays a crucial role in Europe's economy, providing jobs, incomes and benefits for millions of our citizens, and is constantly innovating to meet new consumer demands and adjust to the challenge of sustainability. Before I step down, let me therefore take stock of our main achievements over my time as Commissioner.

First, let me mention an area particularly relevant to the hospitality sector: digitalisation and the collaborative economy.

With the help of the COSME programme, we put in place a series of actions supporting small and micro tourism enterprises' digital transformation. We mostly focused on digital, online marketing and e-management skills, reaching tourism SMEs across EU Member States through the Tourism Business Portal, our webinars and local seminars. In addition, we financed the establishment of the first European network of incubators to support innovative SMEs and start-ups in tourism and creativity.

The rapid evolution of new business models has a strong impact on the hospitality industry and on local communities. During 2017, we organised a series of workshops on the collaborative economy in the tourism accommodation sector. We concluded this strand of work with a high-level conference in October 2018, where we presented and debated about the outcome of the workshops. Let me take the opportunity here to thank HOTREC for its valuable participation in both the workshops and the conference. Since then the Commission has continued the dialogue with the relevant stakeholders and destinations, in order to discuss challenges and provide guidance on the application of EU rules to new business models.

Second, another common challenge we have addressed and we continue working on is skills. Our efforts seek to improve the resilience of the tourism workforce by equipping them with the right skills. We mobilised close to €5 million to support a strategic cooperation on skills in tourism, in the context of the New Skills Agenda and its Blueprint for Sectorial Cooperation, and improve the image of tourism careers. We supported the establishment of a European cooperation platform to identify and close the skills gap and define the skills and job profiles the tourism industry needs. The platform is currently working on an action plan to roll out those skills at national and regional level. In parallel, we also put in place an awareness-raising campaign to improve the perception of the sector as a long-term career opportunity .

.../...

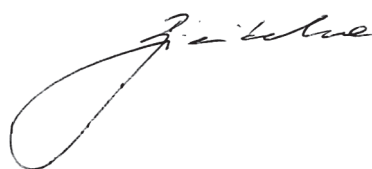
# FOREWORD BY MRS. ELŻBIETA BIEŃKOWSKA, COMMISSIONER FOR INTERNAL MARKET, INDUSTRY, ENTREPRENEURSHIP AND SMES

Third, the long negotiation of the EU code for short stay visas is in its final stage. The European Commission put forward a balanced proposal that facilitates issuing short-term visas to travellers, while taking into account migration and security concerns. Following the political agreement between the European Parliament and the Council of the EU, the new rules should enter into force in January 2020. This will bring significant benefits to travellers from third countries as well as the EU tourism industry, including the hospitality sector.

Finally, last year we celebrated with great success the EU-China Tourism Year. Throughout the year, together with our Chinese partners, we held 15 high-level events and organised 10 large B2B matchmaking events for EU tourism businesses with more than a thousand EU operators and more than 700 Chinese operators. Through participating in major tourism fairs, television programmes and extensive online campaigns in China, we worked to promote less known destinations in Europe and showcase our unique and rich natural, cultural and historical heritage. The first results are encouraging: about 8 % increase in Chinese arrivals to the EU by September 2018 and almost 17% increase in bookings from China for the first quarter of this year.

As you see, the European Commission has put many efforts into supporting the EU tourism sector in the last 5 years. More importantly, we put forward a comprehensive proposal that provides financial support for tourism across a number of EU programmes and funds under the next Multi-annual Financial Framework beyond 2021. We proposed targeted support to SMEs under the Single Market Programme; to research and innovation in tourism under Horizon Europe; to public and private investments under the European Structural and Investment Funds and InvestEU; and for synergies with culture and creativity under Creative Europe. Our ambition is that tourism industry and tourism stakeholders will make the best use of these opportunities.

To conclude, let me thank again HOTREC for its constructive and proactive cooperation during the past years and its active involvement in shaping the policy agenda for EU tourism.





# MESSAGE FROM HOTREC PRESIDENT AND HOTREC CHIEF EXECUTIVE OFFICER



*The past 12 months saw the European hospitality industry further engaging into sustainable tourism*

HOTREC joined the World Tourism Organization One Planet Travel with Care Programme and developed a Charter to improve energy efficiency in the tourism sector bringing together ETC, ETOA, EuroACE, EuroCommerce, METRO Group, NECSTouR, SMEunited, The European Alliance to Save Energy and UNWTO. HOTREC was also appointed Rapporteur for the food service sector by the European Commission to develop recommendations in food waste prevention.

The industry's contribution to society took a new step ahead through the creation of 1,6 million new jobs between 2013 and 2016, now providing 11,9 million direct jobs in 2 million enterprises, making it a European Champion not only for growth but also for job creation.

HOTREC played a prominent role in the policy arena and worked closely with the EU Institutions to ensure that the platform-to-business relations Regulation would provide fairness and transparency not only to the 200,000 European hotels, but also to the millions of European customers, making the revision of the Consumer Law a must. Collaborative economy platforms remained under strong pressure and got Airbnb taking commitments towards the European Commission in particular on the differentiation between traders and peers to be enforced thanks to the network of consumer competition authorities. This also is true with the Juncker New skills Agenda for Europe including a piece of legislation on work life balance for parents and carers, which stroked for a good balance for workers and enterprises.

The European elections provided HOTREC with the opportunity to communicate its main priorities during a High-Level European Parliament event kindly hosted by MEP De Monte in presence of 65 participants from the broader tourism sector and the EU Institutions, prioritized as follows: making the registration of activity in short term accommodation rental activities a must; promoting a new thinking on subsidiarity and exerting EU competences; revising the EU's regulatory framework to recognize platforms' liabilities; fostering voluntary initiatives for healthy lifestyles instead of horizontal legislation, and making the fight against skills shortage a truly EU case.

Last but not least, Azerbaijan and Georgia joined HOTREC, taking the HOTREC Membership to 43 national Associations in 31 countries.

We take this opportunity to thank the HOTREC Membership for their ongoing support and the EU Institutions for an excellent cooperation over the past 5 years and we look forward to continuing same.

Jens Zimmer Christensen  
President

Christian de Barrin  
Chief Executive Officer

# CORE POLICY ACHIEVEMENTS AND ACTIVITIES



HOTREC constantly strives to develop activities that achieve meaningful results to the benefit of the hospitality industry in Europe and on a broader scale to society. In 2018/2019, HOTREC developed several actions and reached many policy achievements which contribute to that goal through a fruitful cooperation with EU institutions and policy-makers.



*"Tourism is a major industry in Europe, an essential part of the mosaic that makes up Europe's industrial fabric. It has spin-offs in the areas of trade, agrifoodstuffs, the cultural and creative industries, transport, construction and shipbuilding. The travel and tourism sector is one of our major job creators. In short, it is an industry that creates added value throughout the EU, it makes Europe a global leader in international tourism and it is 'the world's number 1 tourism destination'. As one of the main representatives of the EU tourism industry, HOTREC's role in shaping the future of European tourism is key in tackling the challenges this sector will undoubtedly face during the next term."*

Antonio Tajani, President of the European Parliament

*"Over the past 4 years, Tourism Policy gained its place at the EU agenda. The Manifesto on Tourism for Growth and Jobs has been the beginning where more than 40 EU Tourism stakeholders set clear objectives to support EU tourism development. Thanks to Hotrec's initiatives we pinpointed the challenges of the sector and the need for action. As Chair of the Tourism Working Group in SME Europe I am convinced that we made a historical step forward towards a better, sustainable and smart EU Tourism policy with the adoption, for the first time, of a budget line for Tourism for the next multiannual financial framework."*

Claudia Monteiro de Aguiar, Member of the European Parliament



*"After 5 years we put tourism policy together on its deserved place in the political arena. With the clear policy and budget related position of the European Parliament we created the possibility to have a stronger Tourism representation in the coming years. HOTREC has a crucial role to maintain the constant development of Tourism industry."*

István Ujhelyi, Member of the European Parliament

*"As the European Parliament's rapporteur on food waste I commend HOTREC and its members for their efforts in reducing food waste and for the meaningful input they provided to my policy work".*

Biljana Borzan, Member of the European Parliament





# More transparency and fairness in platform-to-business relations through a new EU Regulation



*HOTREC actively demanded for and contributed to a new EU Regulation which allows for this first step towards a more transparent and fairer online distribution market*

The growing importance and influence of online intermediation platforms, together with an increasing market concentration, has led to a generalisation of unfair practices in platform-to-business relationships. Given the dominance of some platforms (e.g. in the online hotel booking market of around 200.000 hotels in the EU, one platform controls more than 66% of the market), these widespread practices have become a big hurdle to the hundreds of thousands of mainly small European businesses concerned.

## **A new European Regulation to solve a pan-European problem**

To tackle this issue, HOTREC actively promoted the adoption of a new European legislation to regulate platforms' behaviours, including safeguards for the hospitality business. The European Commission responded favourably, with a proposal for a Regulation issued in April 2018 which identified well the key aspects of platform-to-business relations and the main areas where European businesses were struggling to obtain a fairer treatment. As the Regulation was approved by the European Parliament and the Council in a fast procedure, European businesses will soon enjoy:

- More clarity and predictability in platforms' terms and conditions;
- More transparency on additional distribution channels of the platforms where businesses' products are marketed;
- More transparency on rankings, getting a better idea on ranking mechanisms to be able to make more informed choices for business decisions;
- A coherent and objective internal complaint handling process of the platforms, with the possibility of easier seeking for their rights at other instances as well.

## **The first step towards a more balanced online market**

HOTREC's actions were effective to draw EU policy-makers' attention about unfair practices in the platform economy and to strengthen further the Regulation, so as to better protect businesses' interests in the online markets. This Regulation, which shall be applicable from mid-2020, is marking a first important step towards more balanced online markets. An EU Observatory on the Online Platform Economy is tasked to ensure a proper implementation of the Regulation and to identify areas where additional EU action might be needed.

# Collaborative economy platforms under pressure to comply with European legislation and offer more transparency

The so-called 'collaborative' economy keeps playing an ever rising role in Europe's economy, without still complying with the necessary rules to level the playing field with the hotel sector and to protect European consumers. Many new platforms regularly enter this market, attracting an ever increasing number of service providers and consumers, making the market grow steadily. For instance, besides the classic short term rental accommodation platforms (e.g. Airbnb), Online Travel Agencies (e.g. Booking.com) are now also active on this part of the market. Thus, it is high time to ensure that applicable legislation are complied with and enforced, so as to protect consumers and honest businesses suffering from unfair competition by rogue traders.

## EU action to enforce compliance with the rules

Following a detailed investigation of the European Consumer Protection Cooperation, European Commissioner Věra Jourová, in charge of Justice and Consumers, requested on 16 July 2018 from one of the biggest short term rental platforms, Airbnb, to comply with basic European rules regarding price transparency, indication of traders and consumer contract law.

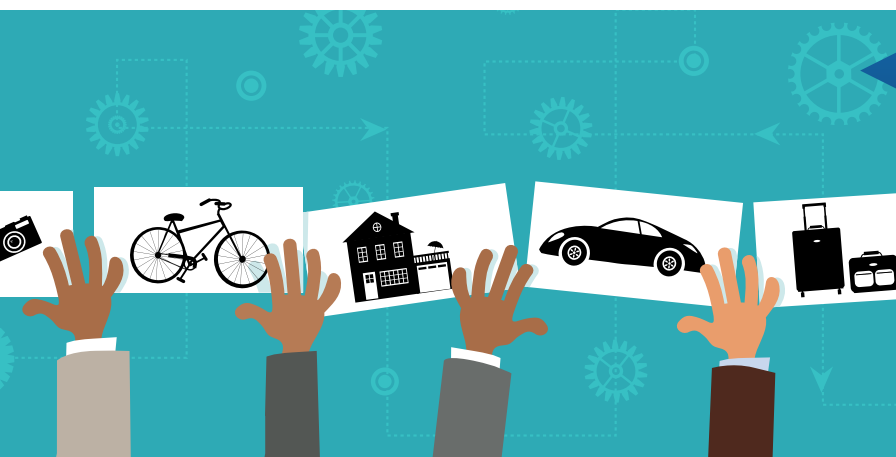
In particular, Airbnb was requested to:

- Be more transparent on the total price displayed from the start of consumer search (e.g. by including service fees, which were often not included);
- Indicate whether a service provider is a trader or not, thus allowing consumers to better identify if the transaction is protected by EU consumer protection laws;
- Adjust its contract terms towards consumers by deleting illegal terms, which gave the impression that consumers have more limited rights than actually provided by law.

Airbnb committed publicly on 20 September 2018 to adjust its policies in line with the above points by the end of 2018.

## A good concrete example of stepping up for a fairer collaborative economy type of market

HOTREC has been actively advocating for a sustainable and responsible 'collaborative' economy in the past years through a set of proposals and key principles included in a policy paper. HOTREC considers that these measures and principles would bring more fairness vis-à-vis both consumers and competing businesses complying with often complex sectoral legislation. HOTREC will continue its efforts to further level the playing field, which is all the more required as 'collaborative' service providers are rapidly and intensively professionalising their services offered on a regular basis on the market.



*HOTREC's call for a sustainable and responsible 'collaborative' economy was echoed by DG Justice and translated in commitments by AirBnB*



# Protecting consumers and businesses from misleading practices online through a revision of EU consumer law

The digital era has led to a paradigm shift impacting all sectors of society. Tourism and hospitality services have not escaped this digital transformation, and were even among the pioneer experiencing it. This rapid transformation also came with the diffusion of new misleading practices online impacting both consumers and businesses. HOTREC therefore promoted and obtained new transparency requirements which should restore trust in online markets, thanks to a major revision of EU consumer law.

## Rankings, reviews and price promotions to become more transparent online

As advocated by HOTREC, EU institutions agreed on new transparency requirements for online platforms and review sites, as part of the EU proposal for a better enforcement and modernisation of EU consumer law recently adopted by the European Parliament. These new requirements will eliminate some widespread unfair practices affecting both businesses and consumers.

In particular, the revised EU consumer law will:

- Ban hidden paid-placements on rankings (i.e. a practice from online platforms to discreetly advertise some products through higher rankings without informing consumers accordingly);
- Provide guarantee that price discounts advertised on online platforms are not fake (as some platforms often promote 'discounts' which do not exist);
- Require online platforms and online review sites to inform consumers about the main parameters used to determine rankings of products;
- Prevent manipulation of online reviews through misleading statements about their authenticity.

## A renewed transparency for the collaborative economy which will bring a level-playing field

The revision of the EU consumer law framework will also provide additional transparency for consumers using collaborative economy platforms. According to the new provisions, which were actively promoted by HOTREC, online platforms will be required to inform consumers if a product is sold by a trader or an individual and consequently if the transaction is protected by consumer law. It will prevent rogue traders from using the anonymity of collaborative economy platforms to circumvent their legal obligations and will contribute to restore a level-playing field on the tourism accommodation market.

HOTREC's advocacy activities have therefore resulted in a new EU consumer law framework which better protects consumers and hospitality businesses, and boosts consumer trust in tourism services.



*HOTREC actively promoted new EU law requirements to protect both consumers and businesses and ensure fairness and transparency in online markets*

# A key partner for the EU to reduce un-healthy industrial trans fats in food

*HOTREC successfully promoted a legislation which will preserve Europe's gastronomic diversity, protect public health and avoid red tape*



The well-being of customers is at the heart of the 2 million hospitality businesses in Europe. With this goal in mind, the sector always takes its responsibilities when public health is at stake, as illustrated by HOTREC's position in favour of responsible and pragmatic European legislation to tackle the issue of trans fat in food.

## **Preserving Europe's gastronomic diversity and public health**

Trans fats are a particular type of fats that can either be produced industrially or be naturally present in the fat of ruminants. A high consumption of foods rich in trans fats (TFAs) significantly increases the risk of cardiovascular diseases, which is a prime source of premature death in Europe.

To tackle this issue, HOTREC supported the European Commission proposal to legislate on industrial TFAs only and to leave aside naturally occurring TFAs in food. Natural TFAs are present in the traditional gastronomy of most Europeans through meats, cheeses and other dairy products which form the European gastronomic heritage. As they are found in much lower quantities than their industrial equivalent in highly-processed food, HOTREC supported a pragmatic approach which will protect public health and preserve Europe's gastronomic heritage.

## **HOTREC supported the establishment of a legal limit to protect consumers' health**

As industrial TFAs are not produced by restaurants, but may be part of ingredients supplied to them, HOTREC also promoted successfully towards the EU institutions the adoption of a legislation which would set a binding legal limit of industrial TFAs allowed in food (i.e. maximum 2% of the total fat content) supplied to consumers and to hospitality businesses. This solution allows to preserve hospitality businesses from sampling obligations on the supplies they receive, and to guarantee to clients that the dishes they serve are healthy and freed from most industrial TFAs.

As the new EU legislation on trans fats was adopted on 24 April 2019, HOTREC's support to pragmatic and ambitious solutions will help to protect public health through a drastic reduction in the content of un-healthy trans fats in food and dishes consumed by European citizens, without unnecessarily burdening the restaurant sector and its numerous micro-enterprises. A win-win solution for all parties concerned.



# Making the European Pillar of Social Rights fit for businesses

Work-life balance and gender inequality in the labour market are two issues of major importance for the economy. As a labour-intensive sector, the hospitality sector holds a specific responsibility to provide good working conditions for its employees. At the same time, the right balance must be found to preserve businesses from un-sustainable burdens, as 90% of the 2 million hospitality businesses in Europe are micro-enterprises. As the EU institutions discussed a new proposal for a Directive on “Work-life Balance for Parents and Carers”, HOTREC promoted a responsible position aiming at finding the right balance between employees’ rights, and the administrative and financial impact the legislation would have on micro-enterprises.

## **A constructive and pro-active dialogue with EU institutions**

With this dual objective in mind, HOTREC promoted a constructive position towards the EU institutions through a series of meetings held with Members of the European Parliament, a participation to a roundtable discussion in the European Parliament and the establishment of a systematic communication system towards the Member States’ Permanent Representations.

## **A legislation that strikes a good balance for workers and enterprises**

A balanced result for both workers and small-enterprises was achieved in the final legislation adopted.

On one hand, workers’ right to a fair work-life balance are enhanced through a right to at least 10 working days of paternity leave around the time of birth of a child (paid at sick pay level), and to an individual right to 4 months of parental leave (2 of them being paid and non-transferable between parents) to be taken until the child reaches eight years old. A specific leave was also created to care for relatives in need of support due to serious medical reasons. Finally, flexible working arrangements can be requested by parents and carers.

On the other hand, enterprises will not face undue burdens, as Member States will have the flexibility to decide on the ceiling of the payment for paternity and parental leaves, and, in the case of parental leave, on the level of payment. There is also no obligation for the employers to pay for the carers leave. Finally, Member States may make the right to request flexible working arrangements subject to a period of work qualification. This represents a balance achievement that will preserve small enterprises while promoting a better work-life balance.



*HOTREC pro-actively engaged with EU policy makers to minimise costs and red tape while delivering a good work-life balance for employees*

# Providing solutions to better manage tourism flows and promote sustainable tourism

With international tourist arrivals forecast to rise by 250 million over the next decade, some European tourism destinations have encountered difficulties to manage ever increasing tourism flows. HOTREC decided to take actions to help public authorities to address the challenges linked to the risks of 'overtourism' in some destinations. To this end, HOTREC developed a position paper which points out the causes and the consequences of the phenomenon for popular destinations, and presented key recommendations for policy and decision-makers on how to tackle it.



*HOTREC offered solutions to better manage tourism flows and contribute to sustainable tourism development*

## **Understanding overtourism: a multi-fact problem linked to the management of tourism flows**

The global rise in the number of travellers to and around Europe for the purpose of tourism is positive for the European hospitality industry, as it helps to create important economic opportunities and employment for local populations and build bridges between cultures. However, it also represents a challenge, as demand is often concentrated in a few destinations, which, as a result, suffer from pressure on public infrastructures and the environment, while the lack of available tourism accommodation indirectly makes the cost of living rise.

## **HOTREC put forward 5 recommendations to help policy-makers to better manage tourism flows**

To sustain tourism and its numerous benefits to all stakeholders, HOTREC offered 5 key solutions to policy-makers and public authorities, with the view to better manage tourism flows and their consequences. The HOTREC position considers that measures to tackle 'overtourism' shall be balanced in order to preserve the sector's important economic and social role.

In particular, HOTREC proposed five areas of action:

- Tourism activity must be well governed: comprehensive data collection is crucial to plan and manage a sustainable tourism policy. This includes measuring short term rentals, which requires the registration of all hosts with the local authorities, the collection of information on nights spent and the obligation to pay all relevant local taxes (e.g. income tax, city tax);
- The public and the private sectors must work together to spread the visitor demand better throughout the year and the destination itself. Incentives could pass through the promotion of less-visited destinations and that seasonal businesses stay open for longer;
- Help every visitor to become a responsible visitor;
- Use dialogue and consultation between local residents, professional tourism organisations and authorities to discuss common solutions;
- As a last resort, consider applying thresholds on visitor capacity in short term rentals.

HOTREC position was widely spread towards EU Institutions and stakeholders. It is a clear example of a pro-active and responsible policy which offers solutions to build a sustainable European tourism development.



# Towards sustainable tourism: HOTREC promotes energy efficiency in the hospitality and tourism sector



*HOTREC developed guidance and a multi-stakeholder cooperation to help the European hospitality and tourism sector to raise its energy efficiency and lower its CO2 emissions*

Tourism accounts for about 5% of global CO2 emissions, hotels being responsible for 20% of that share. In the context of an ever expanding world tourism market, the hospitality sector faces a strong challenge, as the international Paris climate agreement objectives means that future growth in tourism cannot be met any longer by a growth in carbon emissions. HOTREC therefore decided to help the 2 million hospitality enterprises in Europe to raise their energy efficiency and lower their carbon emission levels and energy costs.

## **A new cross-sectoral charter initiated by HOTREC to promote the use of sustainable energy in hospitality businesses**

To boost the industry's sustainability, HOTREC has brought together 9 leading European and international organisations to help to reduce the industry's carbon footprint and therefore contribute to fulfill the International Paris Climate agreement's objectives.

The World Tourism Organisation (UNWTO), the European Travel Commission (ETC), the European Alliance of Companies for Energy Efficiency in Buildings (EuroACE), the European Alliance to Save Energy (EU-ASE), EuroCommerce, the European Tourism Association, METRO AG, NECSTouR and SMEunited signed together with HOTREC a charter to share information, exchange best-practices, promote energy-efficient solutions and facilitate the establishments of partnerships to improve energy efficiency in hospitality and tourism.

## **HOTREC developed guidance to help businesses to decrease their energy footprint**

HOTREC also published a new brochure on energy efficiency in the hospitality sector. The brochure presents the key aspects of a good energy management policy, offers guidance to generate energy savings through a set of simple tips that any hospitality business can implement, and identifies long-term energy saving solutions based on investments in sustainability. The brochure also presents a selection of best-practice initiatives across Europe and examples of energy efficient hotels and restaurants, all showing that the European hospitality sector is already accompanying this major shift towards sustainability.

These guidance, if implemented, shall result in important cost-savings, as energy accounts for 5% to 10% of total costs in the hotel industry. Their implementation will also help to reduce hospitality businesses carbon footprint. It is a concrete step to build a sustainable hospitality sector that reconciles both environmental and economic sustainability and offers tourists a responsible and sustainable experience.

# HOTREC unveiled its policy priorities for the next EU legislative mandate 2019-2024

## 2019 EU ELECTIONS

### WHITE PAPER FOR HOSPITALITY IN EUROPE

### TOWARDS SUSTAINABLE TOURISM IN EUROPE



*HOTREC's White Paper offers concrete solutions to EU policy-makers to achieve a sustainable tourism development*

On 23-26 May 2019, the European Parliamentary elections took place across Europe, allowing EU citizens to elect their new European Parliament and to launch a new legislative period of European policy-making for the next 5 years. To sustain the positive trend for the hospitality and tourism sector developed in the previous term, HOTREC released for the European elections its White Paper for Hospitality in Europe.

### **A White Paper which communicates the hospitality industry's 5 key priorities for the EU for 2019-2024**

Following some key achievements over the legislative mandate 2014-2019 (e.g. the first EU policy steps on the collaborative economy, new legislation to make fairer and more platforms practices towards businesses and consumers, securing low VAT rates for tourism in the future), HOTREC proposes 5 key priorities to the EU institutions for the next EU mandate:

- 'Collaborative' economy: the hospitality sector calls to further level the playing field between the more and more professionalised short-term rental and meal sharing activities and other regulated hospitality services;
- A Better Regulation agenda with a new thinking on subsidiarity and exerting EU competences is needed. European legislative action shall focus on large cross-border issues, while the sectoral impact of horizontal legislation should be better taken into account and mitigate impacts on businesses operating only locally;
- Digital: the outdated EU regulatory framework on platforms' liability (e.g. E-commerce Directive) should be revised to recognise the increasing role they play on digital markets, businesses and consumers;
- Food policy: voluntary initiatives on diet, nutrition and lifestyles for local food services shall be fostered instead of horizontal EU legislation;
- Social Affairs: the fight against skills shortage shall be made a truly EU case. Among others, the rapid digital evolution is requiring digital skills, which are often lacking among the hospitality workforce. A strong EU policy should help to innovate, attract, train and retain the workforce.

### **Sustain a close cooperation to achieve sustainable tourism in Europe**

HOTREC and the European hospitality sector are looking forward to sustaining its cooperation and partnership with the newly elected Members of the European Parliament and the European Commission. These proposals are a testimony of the sector's willingness to offer to EU decision-makers solutions to achieve together a sustainable tourism development in Europe.

# CORE EVENTS

During the past 12 months, HOTREC organised a number of high-level events aimed at promoting the hospitality industry's benefits to society towards European policy and decision-makers.

## **HOTREC presented in the European Parliament the hospitality sector's key priorities for the 2019-2024 EU mandate**

In an event organised at the European Parliament on 20 February 2019, HOTREC unveiled its White Paper for Hospitality in Europe. It contains 5 key priorities for the new 2019-2024 EU mandate that follows the May 2019 European elections. The event was hosted by MEP Isabella De Monte and counted with the participation of MEPs Fabio Castado, István Ujhelyi, Claudia Tapardel, Cláudia Monteiro de Aguiar, Eva Kaili and Sean Kelly, as well as Mr. Antti Peltomäki, Deputy Director General of DG Grow, Mr. Carlo Corazza, spokesperson of the President of the European Parliament, various officials from the Member States permanent representations to the EU and stakeholders.

During the event, the President of HOTREC, Mr. Jens Zimmer Christensen, recalled that the hospitality industry is a key driving force of the European economy, as it employs 11,9 million workers and created 1,6 million new jobs between 2013-2016. He stressed that the 5 priorities of HOTREC's White Paper will help to build a more innovative and sustainable Europe and shall therefore be supported by EU policy-makers.

The HOTREC's White Paper 5 key priorities for the next EU legislative mandate are the followings:

- Further levelling the playing field in the accommodation and food sector market in light of the intense professionalisation of providers using "collaborative" economy platforms;
- Revise the EU legislative framework regulating online platforms' liability to reflect their increased role on the markets, especially the E-commerce Directive;
- A Better Regulation agenda that ensures that the EU focuses primarily on large cross-border issues and better takes into account sectoral specific concerns;
- Foster voluntary initiatives on nutrition for local food services instead of horizontal EU legislation;
- Make the fight against skills shortage a truly EU case.

During the event, EU officials and MEPs congratulated HOTREC for the straight cooperation in different fields of activity related with tourism in the past five years. They also encouraged all EU policy makers to include tourism at the heart of the EU policy making, taking into account its contribution to Europe's competitiveness in terms of growth and jobs.



*From right to left: Mr. Antti Peltomäki, Deputy Director General of DG Grow, MEP István Ujhelyi, Mr. Jens Zimmer Christensen, President of HOTREC, MEP Isabella De Monte, Mr. Carlo Corazza, spokesperson of European Parliament President, Mr. Christian de Barrin, CEO of HOTREC – 20 February 2019, European Parliament*





*Mr. Christian de Barrin, CEO of HOTREC, European Parliament Public Hearing, 19 June 2018*

Christian de Barrin	HOTREC Hospitality Europe
Suzanne Blenski	Ministry for the Economy and Finance, France
Wolfgang Hassler	City of Vienna
Christoph Schmon	European Consumer Association BEUC
Carlos Villaro Lassen	European Holiday Home Association



*High-level conference on Collaborative Short-Term Accommodation Rental Services with the participation of HOTREC, EU high-level conference, 11 October 2018*

## **HOTREC participates to the European Parliament's Public Hearing on platform-to-business relations**

On 19 June 2018, HOTREC was invited by the European Parliament's Internal Market and Consumers Committee (IMCO Committee) to present its views on the Commission's proposal for a Regulation on platform-to-business relations.

The CEO of HOTREC, Mr. Christian de Barrin, highlighted to the Members of the European Parliament the strong imbalance in market power between the leading online booking platforms and the around 200.000 hotel establishments, most of which being micro enterprises. He also drew MEPs' attention to the pressing need for such a Regulation, aiming at bringing more fairness and transparency to the online intermediated markets, especially regarding online rankings, better control and transparency on distribution channels and use of businesses' brands. He also encouraged the MEPs to adopt this Regulation before the end of this European Parliament's term, as the conditions for European businesses on the online market need to be improved urgently.

## **HOTREC promotes a level-playing field in a high-level European conference on the collaborative economy**

On 11 October 2018, the European Commission organised a high-level conference entitled 'Collaborative economy: opportunities, challenges, policies'. The aim of the conference was to take stock of policy, regulatory and market developments since the adoption of the Communication on the collaborative economy in June 2016. Around 250 participants discussed the challenges and the achievements in this field.

HOTREC was invited by the European Commission to participate in the panel on Collaborative Short-Term Accommodation Rental Services. On this occasion, the CEO of HOTREC, Mr. Christian de Barrin, highlighted the increasing professionalisation in the short term accommodation market and proposed solutions to allow for more balanced markets.

The panellists agreed that an online registration system of hosts represents a good tool to allow public authorities to better apprehend the market and that platforms shall assist public authorities to perform their tasks, without replacing them. Common understanding was also reached on the need to better distinguish professional from occasional service providers, as advocated by HOTREC.

The event was also marking the end of a series of workshops organised by the European Commission on short term rentals initiated in 2017, which resulted in the publication of best practices providing some guidance to policy makers when taking actions in this market.

## Sustainability at the forefront of HOTREC General Assembly

During its HOTREC's 77th General Assembly held in Krakow on 18-19 October 2018, HOTREC welcomed as a guest speaker Mr. Will Day, Fellow of the University of Cambridge, Institute for Sustainability Leadership and Sustainability Advisor to PwC UK to discuss the challenges raised by climate change, its consequences on human development and the world economy and its implications for the tourism sector.

Recalling the international scientific consensus that climate change is man-made, Mr. Day stressed that ambitious actions are needed to ensure that global warming is kept below 2 degrees Celsius above pre-industrial levels, as per the Paris climate agreement signed by 174 States and the EU. This will impact all sectors alike. He stressed that the hospitality sector will also have to take its fair share of the global community efforts. In particular, there are many simple actions that hospitality businesses can do to reduce drastically their carbon footprint in a cost efficient way, through a reduced energy consumption, a better menu management or the prevention of un-necessary waste.

HOTREC members strongly welcomed this inspirational speech, especially as HOTREC is already engaged in promoting a sustainable tourism development through various actions aimed at raising energy efficiency, preventing food waste or promoting a better management of tourism flows.

## Exploring with the European Commission digital innovations potential for hospitality businesses

On the occasion of HOTREC's 78th General Assembly held in Helsinki on 16 May 2019, HOTREC Members discussed with Mrs. Helen Köpman, Deputy Head of Unit in DG Connect (European Commission), the latest disruptive technological developments at European level, with a special focus on Blockchains and Artificial Intelligence.

Mrs. Köpman highlighted the wide possibilities for practical implementation offered by these new technologies in various industries. Despite many successful applications across various sectors of the economy, there are still technical and regulatory challenges to be solved in order to fully exploit their potential. HOTREC Members exchanged views with Mrs. Köpman on the opportunities these technologies offer for the hospitality sector, however highlighting a few specific challenges, notably in terms of data security and integrity, two areas which are extremely important for the reputation of the industry. HOTREC will continue to follow the discussions around these new digital technologies, as they offer huge potential for the further development of the hospitality sector.



*Mr. William Day, Fellow of the University of Cambridge Institute for Sustainability Leadership, Sustainability Advisor to PwC UK and Chair of the Sainsbury's Foundation Advisory Board*



*Ms. Helen Köpman, Deputy Head of Unit Digital Innovation and Blockchain at the European Commission, addressing HOTREC's General Assembly, 16 May 2019*

# GLOBAL HOSPITALITY TALENTS – HOTELCAREER RECRUITING INSIGHTS

## How to attract, recruit and retain a global workforce

The hospitality industry offers a wide range of work opportunities all over the world. What are the work motives and preferences of global hospitality? What do they consider important, what matters less? The hospitality job boards HOTELCAREER, Caterer.com, CatererGlobal and turijobs, each part of the StepStone Group, wanted to find out.

More than 22,200 respondents participated in this pan-European wide branch survey. The age ranges from 15 to 65 years plus, career levels from Intern to Chief Executive Officer. Regarding work occupation, the talents' experience ranges from several months to more than ten years. Their workforce mostly consists of several ethnic groups, a great share is already experienced in working and living abroad.

At the time of the survey, study participants – male, female and of different nationalities – were split on six previously defined sectors within the hospitality industry: cruise liners, food service and catering, hotels, pubs and bars, restaurants, tourism.

In order to conclude how to best attract, recruit and retain a qualified workforce, it is essential to understand the target group. Employers need to get to know and to understand what most appeals to the candidates they plan to hire. These days, due to increasing shortage of qualified personnel, employees are aware of their value as well as of their position. Since employers progressively need good staff, talents raise their expectations – and are less committed to their actual job, but highly willing to change their situation for the better.

## A job to keep?

We are all aware: staff fluctuation in the hospitality industry is notoriously very high and a costly challenge for employers. Obviously, a great number of hospitality employees all throughout Europe are still looking for their perfect employment. The present study reveals that a clear majority, 65% of all persons surveyed, intend to move job soon. Employers do not want to lose their staff right – but statistics tell their own tale. The tendency of significant openness to future opportunities can be seen by several career levels such as Managers, countries or even age groups. 22% are uncertain about changing the jobs. By making those employees an indispensable part of the company, employers can grip those and build a long-term relationship.

## Prospects of transnational openness

When asked "How likely is it for you to consider working in another country?", more than two out of three hospitality talents on the international level answers "very likely". Most of the employees in hospitality industry are less attached to their roots and are willing to relocate when finding their perfect employment. Overall, candidates within Europe share the opinion, that dealing with formerly unknown cultures by relocating, however, is not only a matter of countries beyond the border.

Number one in the ranking of the most attractive work countries for hospitality employees is the United Kingdom: 16 % of all survey participants would most likely relocate there to start a new job. The result matches a finding, presented in the study "Decoding Global Talent 2018": Great Britain's capital, London, is the number one city where the G20 workforce would move for work. Germany and Switzerland, equals 14%, follow.

## Motives to work abroad

Attracting good candidates, the more positive aspects employers highlight about a job role, the better. But which ones? Career progression is a highly motivating factor for candidates to start a new job in a foreign country. They want to feel challenged and to improve their recent career options. Lower living cost are the least important motive to move abroad for work.



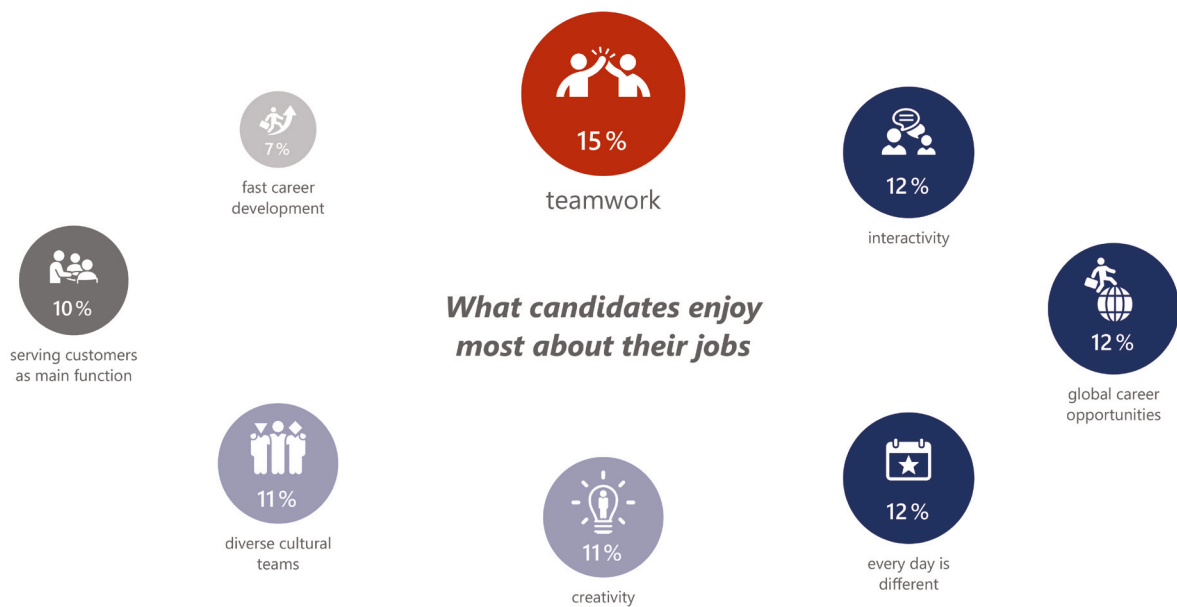
## Reasons to work abroad



So candidates are clearly conscious where they want to move, why and when. If measures match, employers have good prospects of attracting their specialists in demand. Knowing about all these preceding facts and talents' attitudes, employers find themselves in a strategically beneficial position. Once they are aware of the great number of hospitality industry candidates, still looking for the perfect match, recruiters can act and grip the best of them. The ultimate goal, of course, is not only to win candidates, but want them to stay and professionally develop in a long-run.

## Retaining international hospitality talents

The best way for employers to keep their staff loyal and motivated is meeting their demands. Employers need to create or at least contribute to an environment in which talents enjoy working. Asking hospitality talents, that means teamwork, flexible working, tasks and work flows as well as interactivity in customer and people contact. Global career opportunities and diverse and interculturality play an almost equal important role.



Investing in as many of these elements as possible pays off, because loyal, productive employees keep being the most valuable asset of a company!

Want to read the entire study? Request via [marketing@ycg.de](mailto:marketing@ycg.de)

# 2018 HOTEL RESULTS ACROSS EUROPE, BY MKG GROUP

## 2018 in Europe The Golden Age of ADRs is here

SEGMENT	Occupancy Rate		ADR		RevPAR	
	%	Change (pts)	€ VAT excl.	Change (%)	€ VAT excl.	Change (%)
2*	72,9%	0,7	67,0	2,7%	48,8	3,7%
3*	72,4%	1,1	81,2	3,5%	58,8	5,2%
4*	73,1%	1,1	115,3	3,3%	84,3	4,8%
5*	72,7%	1,9	202,6	4,6%	147,3	7,3%
GLOBAL	72,6%	0,9	99,3	3,7%	72,1	5,0%

Source: OlaKala\_destination

Brexit, trade wars, populism and demonstrations... European countries suffered a number of blows in 2018, impacting their economic activities and tourist flows. While there have been many challenges and most of them remain to be resolved, European hoteliers nonetheless show improved performance in 2018, demonstrating a certain appetite among tourists to continue to visit to the old continent, regardless of the weather.

### 2018 was the year for ADRs: +3.3% overall

2017 succeeded in combining an occupancy rate up by more than +2% in each segment with a strong increase in ADR (+2.4% overall). 2017 was the symbolic year of market recovery and renewed confidence in the safety of European destinations. The hotel business was then emerging from a complicated period bruised by the terrorist attacks - which unfortunately have continued - and occupancy remained unchanged between 2015 and 2016.

While optimism remains high in 2018, hotel occupancy seems to have reached a more mature level and is stabilizing at 72.6% thanks to an overall 0.9 point increase. The time has come for the growth in ADRs for hoteliers: +2.7% for the 2\* hotels, +3.5% for the 3\* hotels, +3.3% for the 4\* hotels and +4.6% for the 5\* hotels. 2018 was the year for ADRs: +3.3% overall.

Regarding occupancy rate, all categories registered a positive change compared to 2017. The highest OR change was registered by 5\* hotels with +1.9 point. Other categories registered an OR change between 0.7 point and 1.1 point.

Although 2018 had started off rather well with a +4.7% increase in RevPAR overall in January and +5.3% in April, this momentum was halted in May (-1.1% of revenues) with Germany's poor performance.

Summer allowed the European hotel industry to improve thanks to the Mediterranean region and unspoiled destinations such as the Netherlands, Austria and Latvia.

The Baltic country had a record year with dynamic occupancy (+3.7 points to 73.6%) exceeding the European average (72.7%) and average daily rates up by 5.2%. Hoteliers particularly benefited from festivities associated with the country's centenary and the Pope's visit.

Austria and the Netherlands both posted moderate growth in their occupancy rates, which were already at mature levels, to 78.1% (+1.2 points) and 79.0% (+1.1 points) respectively. With economies in fine fettle boosting the arrivals of business customers and cities with cultural offers that European tourists are fond of on weekends, hoteliers are able to better fill their properties throughout the week and at the same time increase their prices, which jumped by 5.0% in the Netherlands and 6.3% in Austria. In addition to Luxembourg, the Netherlands has the highest RevPAR in Europe at €92.6.

The Duchy, whose main foreign visitors are tourists from neighboring countries, and especially Belgium, Germany and France, saw its occupancy drop by 1.8 points, but nonetheless remain at a high level (76.8%). The increase in its prices (+6.4%) enabled its RevPAR (+3.9%) to cross the three-digit mark to €101.5.

Its neighbor Germany struggled to increase its occupancy rate (+0.4 points) and saw its prices rise by +2.2%, which was smaller than the European average (+3.3%).

The United Kingdom is in the same situation with moderate increases compared to European averages, although it should be noted that its levels are among the highest on the continent. British occupancy thus exceeded 80% and average daily rates were higher than €100.

Belgium's hotel industry had started last year, signing +13.9% growth for RevPAR after the annus horribilis of 2016. The kingdom continues to build on its momentum with an 8.5% increase in RevPAR. It should be noted that its occupancy rate has increased by nearly 10 points in just two years, from 65.8% in 2016 to 75.2% in 2018.

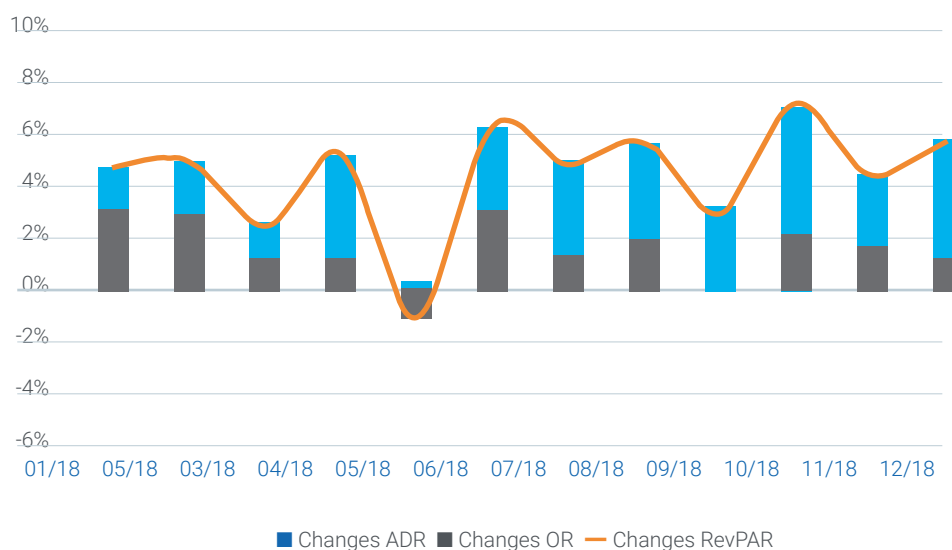
In the Mediterranean region, two situations stand out

On the one hand, Greece and Portugal growth in hospitality in Europe with RevPARs leaping by 14.7% and 18.8 % marked by positive growth in OR and a bound in their ADRs. In 2018, ADRs continued strong growth – by + 9.1% in Greece and + 4.2 % in Portugal – but both lost half a point in occupancy.

On the other hand, Spain and Italy made more moderate progress with RevPAR increases of +1.5% and +3.1%.

Central Europe

Finally, while Hungary performed well (RevPAR +10.2%), the Czech Republic and Poland posted lower growth than other destinations with RevPAR growth by just +0.6% and +0.7%. Prague stagnated (+0.1%) due to falling prices (-0.5%) and most Polish cities saw their RevPAR fall in these uncertain times: Warsaw (-2.3%), Gdansk (-2.9%), Wroclaw (+4.2%) and Szczecin (-4.9%).





# 2018 KEY FIGURES FOR RESTAURANTS AND BARS IN SELECTED EUROPEAN COUNTRIES<sup>1</sup>

In 2018, the restaurant and bars/café sector experienced steady growth in many countries surveyed by HOTREC. Restaurants' turnover keeps growing in almost all countries, with high growth in Finland, Spain, Germany, Hungary, etc. However, revenues dropped in 2018 in France and Switzerland.

## Denmark (2017 figures)



Restaurant and bar turnover (2017)  
**+7,5%**



Restaurant and bar employment (2017)  
Restaurants: **+6,9%**  
representings:  
**51.300 persons**  
Bars/café: **+3,3%**  
representings:  
**15.500 persons**



Number of establishments:  
Restaurants: **+6%**  
Bars/café: **+3%**

*Strong growth in turnover and employment in 2018*

## Finland



Restaurant turnover  
**+4,9%**



Employment (restaurants)  
**+2,4%**



Number of establishments:  
**+2,1%**

*Turnover and employment keep rising strongly in 2018*

## Germany



Turnover Restaurants: **+3,1%**  
Turnover Bars/Pubs/café: **+0,7%**



Employment  
Restaurants: **+0,9%**  
representing **831.000 persons**  
Bars/Pubs/café: **+1%**  
representing **242.000 persons**

*Steady growth in 2018*

## France



Restaurant turnover  
**-2%**  
Café/bar turnover **-4%**  
Brasserie turnover **-3%**

## United Kingdom



Number of pubs & bars **-1,9%**  
Number of managed restaurants **-0,1%**  
Overall licensed premises **-3,1%**

*A difficult year 2018*

*Contraction in the number of establishments*

## Hungary



Turnover of all catering establishments  
**+17,3%**



Number of restaurants **-0,1%**  
Number of liquid stores and discos: **-2,8%**

*Contrasted trends in the catering sector*

1. Sources: HOTREC member associations from Denmark, France, Finland, Germany, Hungary, Lithuania, Spain, Sweden, Switzerland, United Kingdom

## Lithuania

*Consolidation of the sector ongoing*



Restaurant & cafés turnover  
**+ 2,65%**



Employment  
**-1,5%**



Number of restaurants & cafés  
**- 3,36%**

## Spain

*Turnover keep growing but at slower rates for the bar sector*



Restaurant turnover  
**+ 5,2%**  
Turnover Bars  
**+0,9%**



Employment  
**+5,1%**  
representing  
**1,298.500 persons**



Number of restaurants  
**+3,2%**  
Number of bars  
**-0,6%**

## Switzerland

*Employment keep rising despite sharp decrease in turnover*



Restaurant turnover:  
**-2,97%**



Employment Restaurants: **+5,59%**  
representing **183.507 persons**

## Sweden

*Restaurants drive the sector's performances*



Turnover restaurants  
**+ 2,9%**  
Turnover Bars  
**-0,3%**

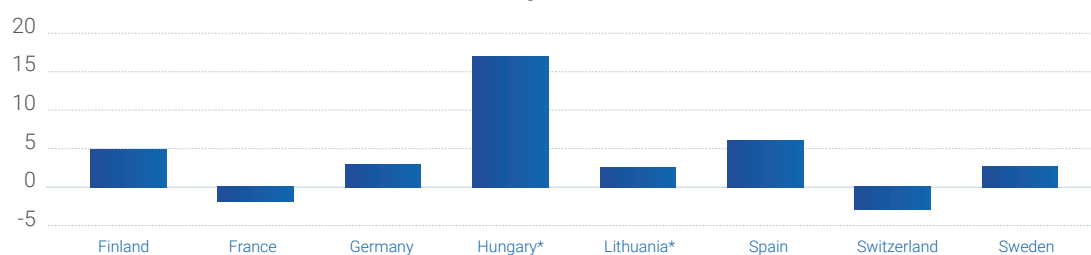


Employment  
**-0,8%**  
representing  
**150,224 persons**



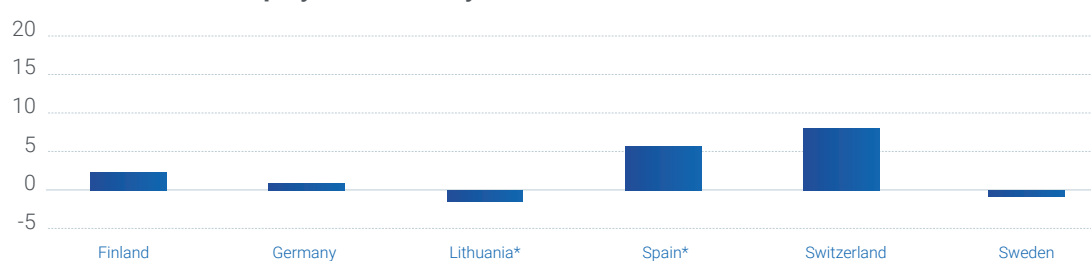
Number of bars & restaurants  
**+1,6%**

Turnover of restaurants - Yearly evolution between 2017 and 2018 in %



\* Figures for Hungary aggregate data for all catering establishments. Figures for Lithuania aggregate both restaurants and cafés

Employment - Yearly evolution between 2017 and 2018 in %



\* Figures for Lithuania and Spain aggregate data for both restaurants and cafés.

# MEET THE TEAM AND THE EXECUTIVE COMMITTEE



**Christian de Barrin**  
**Chief Executive Officer**  
christian.debarrin@hotrec.eu  
+ 32 2 504 78 41



**Guillaume Brouillet**  
**Office Manager  
& Membership Coordinator**  
guillaume.brouillet@hotrec.eu  
+32 2 513 63 23



**Alexis Waravka**  
**Public Affairs Manager**  
alexis.waravka@hotrec.eu  
+ 32 2 504 78 43



**Marta Machado**  
**Public Affairs Manager**  
marta.machado@hotrec.eu  
+ 32 2 504 78 44



**Daniel Makay**  
**Public Affairs Manager**  
daniel.makay@hotrec.eu  
+ 32 2 504 78 42



**Alessia Angiulli**  
**Publication, Event and  
Social Media Officer**  
alessia.angiulli@hotrec.eu  
+32 2 504 78 45



*From left to right: Václav Stárek (Member), Joan Gaspart (Observer), Julian Byszanowski (Member), Alexandros Vassilikos (Member), Samuel Lacombe (Member), Ramón Estalella (Member), Antonio Flamini (Member), Jens Zimmer Christensen (President), Marc Van Muylders (Vice-President) Adrian Cummins, (Treasurer), Morten Thorvaldsen (Member) and Markus Luthe (Member)*



ACCESS THE HOTREC MEMBERSHIP

## FULL MEMBERS

### AUSTRIA

**APHA-Fachverband Hotellerie**  
[www.hotelverband.at](http://www.hotelverband.at)  
President: Susanne Kraus-Winkler  
**APRA-Fachverband Gastronomie**  
[www.gastronomieverband.at](http://www.gastronomieverband.at)  
President: Mario Pulker  
CEO: Dr. Thomas Wolf

### BELGIUM

**Fed. Ho.Re.Ca. Bruxelles-Brussel**  
[www.horecabruxelles.be](http://www.horecabruxelles.be)  
President: Yvan Roque  
**HORECA Vlaanderen**  
[www.horecavlaanderen.be](http://www.horecavlaanderen.be)  
President: Filip Vanheusden  
CEO: Matthias De Caluwe  
**Fédération HoReCa Wallonie**  
[www.horecawallonie.be](http://www.horecawallonie.be)  
President: Thierry Neyens  
Secretary General: Pierre Poriau

### CROATIA

**UPUHH-Association of Employers in Croatian Hospitality**  
[www.upuhh.hr](http://www.upuhh.hr)  
President: Ivan Sabljic  
CEO: Dr.sc. Iva Bahunek

### THE CZECH REPUBLIC

**AHRCR-The Czech Association of Hotels and Restaurants**  
[www.ahrcr.cz](http://www.ahrcr.cz)  
President: Ing. Václav Stárek  
General Secretary: Ing. Klára Stárek Zachariášová

### DENMARK

**HORESTA-Association of the Hotel, Restaurant and Tourism Industry in Denmark**  
[www.horesta.dk](http://www.horesta.dk)  
President: Jens Zimmer Christensen  
CEO: Katia K. Østergaard

### ESTONIA

**EHRA-Estonian Hotel and Restaurant Association**  
[www.ehrl.ee](http://www.ehrl.ee)  
President: Peter Roose  
General Manager: Maarika Liivamägi

### FINLAND

**FHA-Finnish Hospitality Association**  
[www.mara.fi](http://www.mara.fi)  
President: Tomi Lantto  
CEO: Timo Lappi

### FRANCE

**GNC-Groupement National des Chaînes**  
[www.gnc-hotels.com](http://www.gnc-hotels.com)  
President: Jean-Virgile Crance  
Vice-President: Samuel Lacombe  
**GNI-Groupement National des Indépendants Hôtellerie et Restauration**  
[www.synhorcat.com](http://www.synhorcat.com)  
President: Didier Chenet  
Advisor to the President, Director Public Policy & Communication: Franck Trouet  
**UMIH-Union des Métiers et des Industries de l'Hôtellerie**  
[www.umi.h.fr](http://www.umi.h.fr)  
President: Roland Heguy  
Director General: Philippe Delterme

### GERMANY

**DEHOGA-Deutscher Hotel-und Gaststättenverband**  
[www.dehoga.de](http://www.dehoga.de)  
President: Guido Zöllick  
CEO: Ingrid Hartges  
**IHA-Hotelverband Deutschland**  
[www.hotellerie.de](http://www.hotellerie.de)  
President: Otto Lindner  
CEO: Markus Luthe

### GREECE

**HCH-Hellenic Chamber of Hotels**  
[www.grhotels.gr](http://www.grhotels.gr)  
President: Alexandros Vassilikos  
CEO: Dr. Agni Christidou

### HUNGARY

**HHRA-Hungarian Hotel and Restaurant Association**  
[www.hah.hu/en](http://www.hah.hu/en)  
President: Tamás Flesch  
Secretary General: Zsófia Sárvári-Deák

### IRELAND

**IHF-Irish Hotels Federation**  
[www.ihf.ie](http://www.ihf.ie)  
President: Michael Lennon  
Chief Executive: Tim Fenn  
**RAI-Restaurants Association of Ireland**  
[www.rai.ie](http://www.rai.ie)  
President: Mark McGowan  
Chief Executive: Adrian Cummins

### ITALY

**FEDERALBERGHI-Federazione delle Associazioni Italiane Alberghi e Turismo**  
[www.federalbergchi.it](http://www.federalbergchi.it)  
President: Bernabò Bocca  
Director General: Alessandro Massimo Nucara  
**FIPE-Federazione Italiana Pubblici Esercizi**  
[www.fipe.it](http://www.fipe.it)  
President: Dott. Lino Enrico Stoppani  
Director General: Roberto Calugi

### LATVIA

**AHRL-Association of Latvian Hotels and Restaurants**  
[www.hotels-restaurants.lv](http://www.hotels-restaurants.lv)  
President: Janis Valodze  
Acting President: Jannis Pinnis  
CEO: Mag. Santa Graikste

### LITHUANIA

**LHRA-Lithuanian Hotel and Restaurant Association**  
[www.lvra.lt](http://www.lvra.lt)  
President: Evalda Siskauskiene  
Managing Director: Egle Lizaityte

### LUXEMBOURG

**HORESCA-Fédération Nationale des Hôteliers, Restaurateurs et Cafetiers du Grand-Duché de Luxembourg**  
[www.horesca.lu](http://www.horesca.lu)  
President: Alain Rix  
Secretary General: François Koepp

### MALTA

**MHRA-Malta Hotels and Restaurants Association**  
[www.mhra.org.mt](http://www.mhra.org.mt)  
President: Tony Zahra  
CEO: Andrew Agius Muscat

### THE NETHERLANDS

**KHN-Dutch Hotel, Restaurant and Café Association**  
[www.khn.nl](http://www.khn.nl)  
Chairman of the Board: Robèr Willemsen  
CEO: Dirk Beljaarts

### POLAND

**IGHP- Chamber of Commerce of the Polish Hotel Industry**  
[www.ighp.pl](http://www.ighp.pl)  
President: Ireneusz Węglowski  
Secretary General: Marcin Maczyński  
**ZPHoReCa-Association of Employers HoReCa**  
<http://www.zphoreca.pl>  
President & CEO: Marcin Zawadzki

### SLOVAKIA

**AHRS - The Slovak Association of Hotels and Restaurants**  
[www.ahrs.sk](http://www.ahrs.sk)  
President: Tomáš Ondrčka  
Secretary General: Marek Harbuľák

## **SLOVENIA**

**TGZ-Tourism and Hospitality Chamber of Slovenia**

[www.tgzs.si](http://www.tgzs.si)

President: Andrej Prebil

Director: Klavdija Štalcer

President of Slovenian Hotel Managers Association: Gregor Jamnik

## **SPAIN**

**CEHAT-Confederación Española de Hoteles y Alojamientos Turísticos**

[www.cehat.com](http://www.cehat.com)

President: Juan Molas

Secretary General: Ramón Estalella

**Gremi d'Hotels de Barcelona**

[www.barcelonahotels.org](http://www.barcelonahotels.org)

President: Jordi Clos Llombart

Secretary General: Manel Casals

## **SWEDEN**

**VISITA-Swedish Hospitality Industry**

[www.visita.se](http://www.visita.se)

President: Maud Olofsson

CEO: Jonas Siljhammar

## **ASSOCIATE MEMBERS**

### **ICELAND**

**SAF-Icelandic Travel Industry Association**

[www.saf.is/en/](http://www.saf.is/en/)

President: Bjarnheiður Hallsdóttir

CEO: Jóhannes Þór Skúlason

### **LIECHTENSTEIN**

**LHGV-Liechtensteiner Hotel & Gastronomieverband**

[www.lhgv.li](http://www.lhgv.li)

CEO: Walter Hagen

### **NORWAY**

**NHO Reiseliv-Norwegian Hospitality Association**

[www.nhoreiseliv.no](http://www.nhoreiseliv.no)

President: Ole Warberg

CEO: Kristin Krohn Devold

## **OBSERVERS**

### **AZERBAIJAN**

**AHA-Azerbaijan Hotel Association**

[www.hotelassociation.az](http://www.hotelassociation.az)

President: Martin Kleinmann

CEO: Gunay Saglam

### **GEORGIA**

**HOREKA-Georgian Hotel Restaurant Café Federation**

[www.horeka.ge](http://www.horeka.ge)

President: Ketevan Meladze

### **SWITZERLAND**

**GASTROSUISSE-Verband für Hotellerie und Restauration**

[www.gastrosuisse.ch](http://www.gastrosuisse.ch)

President: Casimir Platzer

CEO: Daniel Borner

**HOTELLERIESUISSE-Swiss Hotel Association**

[www.hotelleriesuisse.ch](http://www.hotelleriesuisse.ch)

President: Andreas Züllig

CEO: Claude Meier

### **TURKEY**

**TUROB-Hotel Association of Turkey**

[www.turob.com](http://www.turob.com)

President: Müberra Eresin

Secretary General: İsmail Taşdemir

**TTYD - Turkish Tourism Investors' Association**

<http://ttyd.org.tr/>

Chair of the Board: Oya Narin

Secretary General: Fatih Tokatli

### **THE UNITED KINGDOM**

**UKHospitality**

[www.ukhospitality.org.uk](http://www.ukhospitality.org.uk)

Chairman: Nick Varney

CEO: Kate Nicholls

## **HOTREC EXECUTIVE COMMITTEE**

**Jens Zimmer Christensen**

President of HOTREC, President of HORESTA Denmark

**Marc Van Muylders**

Vice-President of HOTREC, Vice-President of HORECA Bruxelles

**Adrian Cummins**

Treasurer of HOTREC, Chief Executive of Restaurant Association of Ireland (RAI)

**Julian Bystrzanowski**

ExCom Member, Vice-President Chamber of Commerce of the Polish Hotel Industry (IGHP)

**Antonio Flamini**

ExCom Member, Member of the bureau of Federazione Italiana Pubblici Esercizi (FIPE)

**Ramón Estalella Halffter**

ExCom Member, Secretary General of Confederación Española de Hoteles y Alojamientos Turísticos (CEHAT)

**Samuel Lacombe**

ExCom Member, Vice-President of Groupement National des Chaînes (GNC)

**Markus Luthe**

ExCom Member, CEO of Hotelverband Deutschland (IHA)

**Václav Stárek**

ExCom Member, President of the Czech Association of Hotels & Restaurants (AHRČR)

**Morten Thorvaldsen**

ExCom Member, Vice-President of Norwegian Hospitality Association (NHO)

**Alexandros Vassilikos**

ExCom Member, President of Hellenic Chamber of Hotels (HCH)

**Joan Gaspart**

ExCom Observer, Vice President of the European Hospitality Foundation (EHF)

## **HOTREC SECTORAL SOCIAL DIALOGUE COMMITTEE (SSD)**

**Jean Marc Banquet d'Orx**

Chair, Treasurer of Union des Métiers et des Industries de l'Hôtellerie (UMIH)

**Angelo Giuseppe Candido**

Member, Head of social dialogue, training and social affairs area, Federalberghi

**Dave Dankaerts**

Data Protection Officer, HORECA Vlaanderen

**Mag. Santa Graikste**

CEO of Association of Latvian Hotels and Restaurants (AHRL)

**Paul Schoormans**

Policy Advisor, Dutch Hotel, Restaurant and Café Association (KHN)

**Emilie Struck Westersø**

Attorney-at-law, HORESTA Denmark





36-38 Rue Dautzenberg 1050 Brussels | Belgium  
Tel : + 32 (0)2 513 63 23 | Fax: +32 (0)2 502 41 73 | [www.hotrec.eu](http://www.hotrec.eu) | [hotrec@hotrec.eu](mailto:hotrec@hotrec.eu)

