

HOSPITALITY EUROPE BUSINESS NEWSLETTER

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INDUSTRY INTERVIEWS

Interview with Mr. Alessandro Massimo Nucara, Director General of Federalberghi

Mr. Alessandro Massimo Nucara graduated in 1988 at LUISS University (Rome, Italy) in Political Science and started working for Federalberghi in 1990, covering different positions – first as head of trade unions and today as Director General. Enrolled in the Italian Register of Professional Journalists since 1991, he authored many publications and was a lecturer at the University of Perugia and at the Assisi Center of Studies on Tourism (CTS). Mr. Nucara also taught Human Resources Management at the Sapienza University in Rome.



1. In the last decade, the European hospitality industry witnessed a dramatic rise in the use of online platforms selling short-term rental services. Today, many European cities and touristic hot-spots are calling on EU Institutions to better regulate this activity. Could you explain us what is currently happening in Italy in terms of rules and regulations?

Italian legislation is very permissive with regards to the rental market. The country's law in this field does not require any particular obligation, with the only exception of drawing up a written rental agreement. This situation made the proliferation of unregulated accommodation facilities disguised as rental contracts possible.

This is a phenomenon that is negatively impacting everybody. Consumers are not properly protected, the decorum of the city is at stake as well as public health and families living in rented places are being evicted. Let's add to these issues all additional problems related to irregular working, local and national tax evasion and unfair competition at the expense of honest businesses. Today many people eventually understood how severe the problem is. However, awareness alone is not enough: a regulatory action to put order to the market by digging all illegal and irregular users out is now needed.

Some early measures have already been taken and – although being appreciable – they were not sufficient to tackle the issue. In November 2018, for instance, it was established by law that all owners of apartments being rented for short-term rentals should communicate the names of the tenants to law enforcement authorities for each night of their stay. Furthermore, according to another law from July 2019, the same information must now be communicated to the Italian revenue agency (Agenzia delle Entrate) and the municipalities establishing the local tourist tax.

2. Could you give us an overview of the lawsuit that Airbnb recently promoted against the Italian State? Could you also tell us more on the 21% flat tax – so-called "Italian Airbnb tax" – on short-term rental contracts?

On April 2017, the Italian Parliament approved a law obliging all intermediaries – therefore, not only booking portals and not only Airbnb – to pay a 21% flat tax to the Italian State, should they collect an income resulting from the renting from a private citizen.

Airbnb contested this law, but the Administrative Court proved the company wrong. For this reason, Airbnb filed an appeal to the Italian Council of State, which, in September 2019, consulted the Court of Justice of the European Union for further clarification.

We are therefore now waiting for the final response from the EU Court of Justice. It feels like, once again, Airbnb is refusing to collaborate with national institutions while threading the loophole of legalities and in



the meantime, unregulated rentals keep prospering.

3. Parity clauses continue souring the relationship between OTAs and accommodation providers across Europe. Could you describe us how the relationship with OTAs evolved in Italy since the ban on parity clauses in 2017?

I believe that Federalberghi's, HOTREC's and other national associations' struggles against parity clauses in the past few years were eventually very useful. Not only because they led to the approval of a law stating that parity clauses in the accommodation sector are no longer valid but also – and maybe I should say mostly – because it drew the public's attention to how convenient direct booking might actually be. Moreover, it drove hoteliers themselves to invest in their performance on the internet and on training for their sales team.



INDUSTRY INTERVIEWS

Interview with Mr. Aleksandar Vasiljević, President of the Board of the Serbian Hotel and Hospitality Industry Association (HORES)

Mr. Aleksandar Vasiljević entered the Serbian hospitality industry in 2000, when he began working as a receptionist and concierge at the Hyatt Regency Hotel in Belgrade. After briefly living in Montenegro to work as a Managing Director of the Villa Montenegro hotel at Sveti Stefan he returned to Serbia, where he became Operations Manager first and then Managing Director at the Zira Hotel in Belgrade. Mr. Vasiljević is now General Manager of the Falkensteiner Hotel in Belgrade and is President of the Board of the Serbian Hotel and Hospitality Industry Association (HORES).



1. The Serbian Hotel and Hospitality Industry Association (HORES) joined HOTREC in October 2019 during the 79th General Assembly in Croatia. Could you tell us more about your Association's history and about its future projects and goals? Could you also briefly inform us on the main challenges the Serbian tourism industry is currently facing and how do you think the HOTREC Membership will support you tackle them?

HORES is a Serbian umbrella business association bringing together hoteliers, restaurateurs, cafés and other hospitality establishments – as well as various suppliers and other stakeholders – all with a common goal and a strong need for an association to constantly work on the promotion and improvement of the hospitality industry, but also on guild protection, control of business ethics and of course growth of business competitiveness of its members – both at national and international level.

HORES was first established in 1967 and during its 42 year-long journey it grew from 15 to today's almost 200 members. HORES' membership comprises over 150 hotels, motels and other accommodation facilities, representing about 80% of Serbia's overall basic accommodation capacity and over 2000 catering establishments.

The Serbian tourism industry is currently facing a very serious challenge, the same as the SEE region in general – this being the issue of employees. We are facing a serious lack of professionals who are leaving the country in search of better working and living conditions.

We considered it a great honour for our association to join HOTREC last October. We expect that, under the HOTREC umbrella, we will be able to establish new and further enhance the development of existing business models improving the competitiveness of the tourism industry – and the tourism offer in general. We do believe that this will eventually lead to the creation of a better environment for all tourism professionals, eventually offering them a good reason to stay in our country and further develop their professional careers in Serbia.

2. As you know, HOTREC's scope is very horizontal, covering many key fields and topics related to the hospitality industry in Europe (e.g. collaborative economy, digitalisation, sustainability). In which field(s) of activity do you believe HORES will be most interested in collaborating with us and why?

Since HOTREC's mission is to promote the interests of the hospitality enterprises in front of the European Institutions and as Serbia is aiming at becoming part of the EU in the near future, we definitely believe that the HOTREC membership will be of great help in all tourism-related matters concerning the European area.



We also share HOTREC's interests in achieving a favourable regulatory environment which will enable hotels, restaurants, and cafés to be competitive, thus providing more jobs and improving the growth of the European economy. This is something Serbian hospitality can certainly benefit from.

Besides all this, of course, we do expect that your know-how and best practice sharing will greatly help us to further promote innovation among our own members.

All in all, HORES is positive that HOTREC's expertise in the field of European hospitality – which the Association is sharing among its members – will be highly beneficial for us and for the Serbian hospitality sector.

3. Could you give us more details on the Serbian hospitality sector (e.g. tourism statistics)? What do you think the main trends will be and how do you think the industry will grow in the next years?

The Serbian hospitality sector significantly developed during the previous years, thanks to a general prioritization of tourism, promotional efforts, international openness and better air connectivity – which further resulted in visitors growth. The sector was among the best-performing ones in terms of growth of its key indicators, relative to insignificant GDP growth rates. As a result of all these positive trends, there was an obvious growth in supply, with more international hotel chains entering the market.

Thanks to the remarkable progress in the hotel sector, the Belgrade market attracted the investors' attention and this translated into several new developments (e.g. Hilton and Mama Shelter entered the market in 2018) which already changed the hotel market landscape considerably and will continue to do so in the near future. In fact, in the following period, the St.Regis hotel (125 rooms) and the W hotel (120 rooms) were announced within the Belgrade Waterfront project. New developments will restructure the market and the existing competition, bringing new quality and supporting the city's new positioning on the tourist map.

However, there is always room for improvement. The enhancement of the MICE (Meetings, Events and Incentive Travel Market) Industry – both because of the number of events and of the need for necessary infrastructures – is among the key prerequisites for sustainable growth in the hotel sector, together with better air connections and wide promotion of new source markets.

Overall, growth in the travel and hospitality sector is expected to continue bringing along the increasing share of international visitors.



INDUSTRY INTERVIEWS

Interview with Mr. Václav Stárek, President of the Czech Association of Hotels and Restaurants (AHR CR)

Mr. Václav Stárek is a Czech hospitality industry expert and President of the Czech Association of Hotels and Restaurants (AHR CR).



1. On 28-29 November 2019, the Czech Association of Hotels and Restaurants held its 14th Conference in Prague. Can you briefly describe us the agenda of the conference and give us more details on the overall results of the event?

Our association organises a professional conference for its members every year. This year we achieved the highest delegate attendance record ever so far. A total number of 400 hoteliers from all over the Czech Republic came to Prague, along with several foreign guests.

Our organization holds a number of events every year under the AHR CR Roadshow heading – which typically focuses on everyday issues related with entrepreneurship and the latest legislative developments – and once a year we hold this annual conference, which focus is more of a visionary kind. We try to get all of our colleagues inspired at the same time, not only by the unique venues that the conference takes place in but also by a variety of ancillary events and by the catering schemes involved.

This year was not different from this point of view: the conference itself was actually one of the very first events hosted by the newly opened O2 universum congress centre in Prague, the GTG party took place in the newly reconstructed premises of the Historical Building of the National Museum and the gala evening was held in the newly refurbished Empire Hall of the Slovanský dům. During the gala evening, the AHR CR traditionally bestows awards upon the best hoteliers and restaurant operators, but it also recognizes those our members who have been involved in responsible business and it awards the best young managers under 30 years of age. By doing this, we strive to support the development of our industry in this country while motivating additional members to engage in supporting young talents and responsible entrepreneurship.

The catering service presented during the most recent event followed the lines of a novel sustainable catering concept developed by Zatisi Group, one of our members. Their catering relies on local ingredients, works with the ZeroWaste concept and aims for high-quality and well-balanced nutrition at the same time.

2. Could you explain us which was the key topic discussed during the conference and how relevant it is for the hospitality sector in Europe?

We make sure the agenda is sculpted every year so as to address a broad range of entrepreneurs in hospitality, and we do try at the same time to seek answers to some of the currently open issues that our entrepreneurs are concerned with.

We have focused this year on the emerging restaurant concepts, on sustainable business in hospitality, on the issues of motivation and stabilization of work teams and on the various approaches to attracting new employees, too. Digitization and the use of new technologies was another topic to have been found



particularly interesting by our participants. The greatest success, though, may well have been the lecture given by writer and publicist Peter Ludwig, a man known to tear down the half-truths and myths occurring in the personal development area. His book, entitled "The End of Procrastination" sold 100,000 copies in the Czech Republic alone, was translated into 10 world languages and was published in the USA this year by one of the world's largest publishing houses. Research shows that we tend to incline to one of the two types of thinking. The first one leads to depressive tendencies and failure. The second one, on the contrary, results in satisfaction and significantly better results. Changing the way of thinking can grossly influence one's life for the better. This holds for private lives and professional careers alike. Indeed, studies have confirmed that what our life may look like is largely predetermined in our mind, and also that our satisfaction in life can be increased by conscious effort.

As you can see, each and every participant could obtain some really useful information to not just help improve their business-making, but also to benefit from by themselves. The conference agenda has been very positively assessed by the participants and the lectures have been simultaneously translated into English for several years now, which is opening up new opportunities for our colleagues from other European countries to attend the event as well. The next AHR CR conference will be held in November 2020.

3. Finally, could you tell us more about other projects currently carried out by your Association? Could you give us a few data regarding the hospitality industry in your country?

Our organization deals with providing comments on the legislation in the pipeline, with lobbying and with subsequent counselling in the legislation area on behalf of its members in the first place. We have managed to enforce a new Act on the Collection and Usage of the City Tax this year, but most importantly, we have carried through the second VAT reduction for the restaurants. So the VAT rate for restaurants will newly stand at 10% now, which is an achievement that is being perceived highly positively by all entrepreneurs. In addition to that, we have been involved in several HOTREC projects, of which we consider the standard classification HSU to be of particular importance. Furthermore, we have quite a lot of our own projects on the way, among which I would like to highlight the Night of Hotels activity, which is a CSR project under which hoteliers offer preferential accommodation to residents in their location for one day a year, so trying to show them their city from the guest perspective. We also publish numerous methodological materials, of which the latest ones have been looking at the Food Waste, PSD2 and online distribution topics. Our educational centre – the AHR CR Academy – has trained 14,000 employees of our members over the past five years and we are also very pleased to have the AHR CR Foundation up and running to support the children in children's hospices all over the country and to provide them with education and assistance in the labour market.



DIGITAL ISSUES

Dutch “Airbnb law” a step forward, but still not enough to tackle illegal rentals in the Netherlands



The so-called “Airbnb law”, presented in the Netherlands by Minister Stientje van Veldhoven, was sent to the House of Representatives on 2 December 2019 after being approved last summer by the Council of Ministers. The law obliges private landlords renting their properties to tourists to apply at their municipality for a registration number to be displayed in online advertisements – with fines up to €83.000 in case of non-compliance.

Four Dutch municipalities (i.e. Amsterdam, Rotterdam, The Hague and Utrecht) believe the “Airbnb law” is still not going far enough to tackle the problem of illegal rentals in their country. Not only, in fact, will municipalities have to enforce the rules by themselves – and therefore to monitor all advertisement, with potential staffing problems – but online platforms will not be forced to refuse advertisements not meeting the necessary requirements.

“The municipality is obliged to deal with illegal rentals, the tenant is obliged to register, but there is no obligation for the platforms. I want the data from the unwilling landlords. But if a platform can still place their advertisement, what’s the use of it?” commented Amsterdam alderman Laurens Ivens. Therefore, although being satisfied with the arrival of the registration requirement after a long insistence (read “[10 European cities call on the EU to better regulate Airbnb’s activity](#)”, Hospitality Europe Business Newsletter, issue n°19), the four Dutch cities have still doubts on the willingness of rental platforms to cooperate with the registration system.

Minister Van Veldhoven’s spokesperson commented the municipalities’ scepticism by saying that “the maximum has been done, given the guidelines. If you want more far-reaching measures, you first have to look at what else is possible in Europe. The minister did not want to wait for that now.”

Sources: *Het Parool*, 3 December 2019, “[Wethouder Ivens: ‘Airbnb-wet’ gaat niet ver genoeg](#)”
Echt Amsterdams Nieuws, 3 December 2019, “[Ivens ontevreden over ‘Airbnb-wet’ van minister](#)”
DutchNews.nl, 3 December 2019, “[New rules for Airbnb rentals don’t go far enough, says Amsterdam housing chief](#)”



New Deloitte report on delivery platforms confirms results of HOTREC “Restaurant booking study”



According to a report published by Deloitte for Uber on 2 December 2019, the recent rise of third-party platforms in the food delivery market largely benefited the entire restaurant sector – today, a significant source of entrepreneurship and growth, with a collective turnover in Europe of €421 billion.

The study – which goal was to assess the overall impact of the so-called “aggregators” on the industry – focuses on 4 key European cities (London, Madrid, Paris and Warsaw) and is based on the results of a survey conducted on July 2019 on 500 respondents. The Deloitte report identifies two main trends in the sector:

- Compared to the pre-aggregators era, restaurants are selling a bigger number of meals;
- Overall revenues and profits in the industry also increased.

Such results confirm the conclusions of the [HOTREC Restaurant Booking Study](#) published in June 2019 (read “[Interview to Prof. Roland Schegg](#)”, Hospitality Europe Business Newsletter, issue n°19) and its views on this emerging market’s great potential. However, it is evident how cost issues and the evolution of business models will have to be managed properly to deliver growth promises.

Source: Deloitte, 2 December 2019, “[Delivering growth: the impact of third-party platform ordering on restaurants](#)”



TripAdvisor published its first ever Review Transparency Report



TripAdvisor published on 17 September 2019 its “[Review Transparency Report](#)”. This is a first for the online giant, which never before shared detailed information with the public regarding its review moderation process.

“We have a duty to our users and to the industry to make sure that TripAdvisor is used fairly and honestly by all those who contribute content to it. That is not easy. It requires a set of clear guidelines that every contributor must abide by. We have to effectively protect against fraudulent reviews that could mislead our customers and hurt businesses” said Mr. Stephen Kaufer, President and CEO of

TripAdvisor.

The Report came up with the following key findings:

- In 2018, TripAdvisor received 66 million reviews from users;
- Once submitted, all reviews were analysed by advanced analysis technology and/or a highly trained moderation team;

- 4.7% of reviews submitted were rejected or removed (e.g. because of guidelines violations or fraud), most of them (3.4%) before being posted on the platform;
- 2.1% rejected reviews were considered fake. 73% of fake reviews were removed before being posted;
- Less than 1% reviews were flagged by users or businesses and analysed within 6 hours;
- 36.643 businesses were subject to a ranking penalty – a reduction of a property's position within the traveller ranking.

The report also explains TripAdvisor's plan to further tackle the fake reviews issue. Specifically, the company will improve the existing penalisation system; will invest in training for their moderators and will strengthen their partnership with law enforcement authorities to facilitate sharing of information.

The publication of the report is a reminder on how a sophisticated and complex system is necessary to ensure fair and transparent ratings for guests and companies online. It is important to remember how the hospitality sector, in fact, is particularly vulnerable to the damage produced by fake reviews – since a single negative counterfeit rating is often enough to damage a restaurant or a hotel by lowering its average rating on online platforms.

Source: TripAdvisor, 17 September 2019, "2019 TripAdvisor Review Transparency Report"



New Federal Act on Registration in Germany to enable digital check-ins as of January 2020



Until now, a digital check-in in a German hotel was not possible according to the current legal situation in Germany. The Federal Act on Registration (Bundesmeldegesetz) states that guests, whether domestic or foreign, must sign the registration form manually on paper. Neither a digital signature nor a declaration of consent within an app was accepted.

However, this will change shortly. On 24 October 2019, the German Bundestag approved the Third Act on Bureaucracy Relief (BEG III), which provides for an amendment of the Federal Act on Registration. After a long struggle, this enables the digitalisation of the hotel registration form.

Prior to this, representatives of the German Hotel Association (IHA) and the Bavarian DEHOGA had already discussed all topics relating to hotel registration at a meeting held at the Federal Ministry of the Interior. The associations rated the exchange with politicians as very positive. "We are pleased that we were able to initiate an improvement process for the industry in a constructive dialogue. Our initiative has been well received by the federal ministries involved so that we are looking forward to the detailed work now due with some optimism," said IHA Managing Director Markus Luthe confidently.

The association has long criticized the analogue signature of the guest on paper, which is mandatory by law, especially in times of digitalisation. It is simply "no longer up to date". Furthermore, the meaning and purpose of the manual signature were questioned: "Does manual signing of the registration forms really



bring success in search and reconnaissance? How many? Which ones?”. The authorities have been guilty of providing concrete evidence to the public and the hotel industry for years. It is also annoying from the hoteliers’ point of view, that in times of the rising so-called Sharing Economy, numerous unregistered private landlords are allowed to accept guests without a registration form.

The new Federal Act on Registration will come into force about six to eight weeks after the Federal Council has passed its resolution, i.e. presumably on 1 January 2020.

Until then, it will be up to industry representatives to discuss the various digital implementation options, such as reading an identity document or using a card payment with strong customer authentication.





EDUCATION & TRAINING

HOTREC Workshop “Attracting and retaining the workforce in the hospitality sector” (25 September 2019)



On 25 September 2019, HOTREC organised a workshop in Brussels “Attracting and retaining the workforce in the hospitality sector”. The goal of the workshop was to further favour the exchange of best practices on this relevant issue during a well-attended one-day event.

HOTREC Members, industry partners, EU officials and stakeholders (namely, BusinessEurope, the European Commission, HotelCareer and EFFAT) actively participated to the discussions, exchanged ideas on common challenges, put forward recommendations and contribute to shaping one of the sector’s five priorities for the current EU mandate (read [HOTREC White Paper for hospitality in Europe](#)).

Horeca Vlaanderen, HotellerieSuisse, the Irish Hotel Federation (IHF), the Malta Hotels and Restaurant Association (MHRA) and the Union des Métiers et des Industries de l’Hôtellerie (UMIH) participated to the workshop and actively contributed to its successful outcome by sharing best practices with all participants (click [here](#) to read the minutes of the workshop on HOTREC’s website).



GNI’s partner Ethic Ocean presents the annual Olivier Roellinger culinary competition for the preservation of marine resources



The annual Olivier Roellinger culinary competition for the preservation of marine resources brings together each year students from cooking schools and young professional chefs who want to test their know-how and choose a sustainable and responsible cuisine.

The 2020 edition is now open to candidates coming from any European country. Candidates are invited to request an application file at concours@ethic-ocean.org and will have until 8 of January to send back their application and recipes proposal.

Please find [here](#) the brochure presenting the unique contest.





LOBBYING

Airbnb 9-year sponsorship agreement with the International Olympic Committee (IOC) angers hoteliers associations



On 18 November 2019, Airbnb and the International Olympic Committee (IOC) announced a 9-year partnership for the next 5 Olympic Games in Tokyo, Beijing, Paris, Milan and Los Angeles – five cities among Airbnb’s biggest markets.

According to the [Financial Times](#), the partnership is valued \$500m – including a substantial payment to the IOC and costs of other services, such as free accommodation to athletes and executives – and will allow Airbnb to join Coca Cola, Alibaba and Toyota among the members of the elite worldwide sponsorship program for its first large global deal.

IOC and Airbnb declared in a joint statement that the partnership is meant to favour sustainability-oriented initiatives by including “accommodation provisions that will reduce costs for Olympic Games organisers and stakeholders, minimise the need for construction of new accommodation infrastructures for the Olympic Games period, and generate direct revenue for local hosts and communities”. However, it is estimated that the partnership will encourage the creation of hundreds of thousands of new Airbnb hosts in the next 9 years – a move in line with Airbnb’s strategy to become a key partner in large-scale events, but conflicting with the five cities’ attempts to better regulate the exponential growth of the online giant.

French hoteliers associations, in particular, are not happy about the news – as Paris is going to host the 2024 Olympic Games. The Associations chose to retaliate by suspending their participation to the organisation of the 2024 Olympics Games and will no longer sit in preparatory meetings.

Mr. Roland Heguy, President of the [Union des Métiers et des Industries de l’Hôtellerie \(UMIH\)](#) called the partnership “disrespectful to hotel industry professionals”, while Mr. Didiet Chenet, President of the [Groupement National des Indépendants Hôtellerie et Restauration \(GNI\)](#) commented that “the announcement of a partnership with the International Olympic Committee is yet another provocation by Airbnb” and that “looking at the number of Airbnb lawsuit against the biggest cities in the world, we can seriously question Airbnb’s respect of rules” (read GNI’s [press release](#)).

As the cities of Milan and Cortina (Italy) will host the 2026 Winter Olympics, Mr. Alessandro Massimo Nucara, Director General of [Federalberghi](#) – with whom, in this edition of the “Hospitality Europe Business Newsletter” we also had a chance to discuss the Airbnb phenomenon in Italy (read his [interview](#) at page 2) – also commented the news and said that he shares his “colleagues’ indignation concerning the candidacy for the 2026 Winter Olympics. We requested to Italian hoteliers to sign a letter of commitments. It’s my understanding that this obligation was not respected by Airbnb – for which I don’t think custom-made rules were created overnight. Furthermore, it is not clear whether the agreement announced by the International Olympic Committee (IOC) a few days ago was already in force at the time of the Milano-Cortina candidacy or if, in that case, there had been a lack of understanding. I feel sorry to hear that Italian entrepreneurs were discriminated. We hope we will not find ourselves in a position to say in the future that the winter olympics were born under an unlucky star”.

Sources: Skift, 18 November 2019, “[Airbnb signs 9-year sponsorship deal with Olympics ahead of Tokyo games](#)”

Financial Times, 18 November 2019, "Airbnb seals \$500m Olympics sponsorship deal ahead of listing"
Forbes, 21 November 2019, "French Hoteliers Suspend Olympics 2024 partnership over Airbnb deal"



UMIH and GNC meet French MEPs in Strasbourg to lobby for tourism in Europe



In the direct line of their Citizen Consultation on the "future of Europe" organized last year on October 2nd, UMIH and GNC held a meeting with French and French-speaking MEPs in Strasbourg on 24th of September. This event occurred under the patronage of Anne Sander and was the occasion to alert MEPs on the importance of tourism in Europe. Based on the manifesto released for the last European elections, the five subjects discussed were attractiveness and future-oriented investments, digital economy, tax and fair competition, employment and mobility, and sustainability.

Click [here](#) to read the Manifesto (in French!).



European Nightlife award

UMIH acknowledges since long ago that the Night is an important vector of attractiveness and a growing economic sector. For these reasons among others, UMIH in cooperation with SILB-FIPE and SpainNightlife created the European Nightlife Association (ENA) in 2014, which is a partner of Hotrec since October 2017. To a better understanding and illustration of European Nightlife, ENA initiated discussions with the publisher Paris Nuit, which organizes each year the Nightlife Trophies, in order to add a "European Nightlife award". For the first edition of this new category, three Italian nightclubs were selected. The winner will be announced on November 25th during a ceremony held in Paris at the Lido.



Check the Facebook page of the Nightlife Trophies [here](#)!





Gremi d'Hotels de Barcelona participates to the Global ReformBnB Forum in Buenos Aires



Gremi d'Hotels de Barcelona participated to the Global ReformBnB Forum in Buenos Aires. The goal of the Global ReformBnB Forum is to discuss how to deal with the short-term rental (STR) industry. The focus is on developing joint projects and exchanging strategic insights, all with the aim of promoting fair rules.

After attending the first event in New York City and hosting the second one in Barcelona, in Buenos Aires, more than 60 guests from 15 different countries and cities around the world participated to the summit.

Since the hospitality industry is facing a global problem, one which crosses national and city boundaries, the existence of a global forum is required. One that, under the umbrella of a brand, will help us achieve the goals that it would be very difficult for the hotel associations of the world to achieve individually. That is why the Global ReformBnB Forum was created and approved by all the participants.

The GRF is of a forum of volunteer collaboration of hotel associations of cities, regions and national and/or supranational levels that works -globally- in a joint and coordinated way to create synergies and find solutions to the matter of the supply and intermediation of the touristic short-term rentals.

B^hH

BUSINESS TRENDS & STUDIES

International tourism continued to grow over first half of 2019, “UNWTO World Tourism Barometer” report reveals



According to the new World Tourism Organisation (UNWTO) report “World Tourism Barometer” released on December 2019, international tourists arrivals grew by 4% in the first half of 2019 compared to the same period in 2018.

The growth was led by the Middle East (+8%) and Asia and the Pacific (+6%), followed by Europe (+4%) Africa (+3%) and the Americas (+2%) – where the increase was more modest.

Between January and June 2019, 671 million international tourists were registered (30 million more than in the same period in 2018). Drivers of this growth were a stronger economy at a global level, affordable air travel, increased air connectivity and enhanced visa facilitation.

of course, weaker economic indicators, uncertainty about Brexit, and the rising of geopolitical challenges still risk to hump consumers’ confidence and represent, as of today, the major challenges of the sector.

Sources: UNWTO, 9 September 2019 “International tourism up 4% in first half of 2019, World Tourism Organisation reports”

UNWTO Volume 17, Issue 3, September 2019, “World Tourism Barometer (English version)”



European tourism: developments and challenges according to new study by the European Parliament

October 2019: the European Parliament published a study requested by the EP Committee on Transport and Tourism (TRAN) providing an overview of the current state of affairs in European tourism. The study investigated the latest developments in the sector and identified future trends and challenges to be addressed, should the industry continue to grow and become genuinely sustainable.

At the beginning of the study, the European Parliament highlighted the sector’s global growth in 2019 for the 9th year in a row and how in 2018 the number of international arrivals had already reached the unprecedented peak of 1.4 billion – 2 years ahead of forecasts.

At a time when the tourism sector accounts for 7% of worldwide exports, Europe is ranked as the world’s number one destination for international arrivals. While early indicators are that 2019 will see the industry grow even further, the EP study concludes that tourism will continue to create a surplus for the EU economy, making it the 4th largest export industry.





At the end of the study, a number of recommendations, are set out:

- Sustainable tourism development – it is necessary to: a) increase civil awareness and new policies favouring a transition to more sustainable tourism; b) reduce seasonality and peak demand at some destinations; c) establish a harmonised EU certification system and further investigate the potential for a single European tourism label;
- Investment in technology – changes in the use of Information and Communication Technologies (ICT) had disruptive effects on traditional business models. While ICT will be useful to the industry, further actions will nonetheless be necessary to a) develop a monitoring system to identify changes in tourism and supply-demand trends; b) improve data transparency and security; c) adopt further regulations; d) establish an appropriate Regulatory Framework for the Sharing Economy;
- Effective tourism governance – governance structures should allow more resilient, stable and secure destinations. Stakeholder mapping could be adopted as a tool for the effective management of stakeholder networks and strategies should be developed to educate tourists to be more environmentally sustainable and socially respectful when travelling. Innovative tourism governance can contribute in tackling the uneven distribution of visitors (under and overtourism) in destinations;
- European tourism marketing – effective coordination between different countries and stakeholders is needed to enhance Europe’s branding. European destinations must a) revise their traditional marketing strategies and make better use ICT technologies; b) further invest in training to move to strategic destination branding; c) favour cooperation between national, regional and local governmental institutions and Destination Management Organisations (DMOs);
- New skills and training – need for better training programmes in order to increase the skills and competences of the labour force required by the tourism industry in the future was identified by many stakeholders. Any future initiative in this area should seek to improve the image of the industry so that there is a perceptible shift, where tourism represents a higher value career;
- Tourism and the European Union – “the Treaty of Lisbon gave the European Union greater competencies in tourism. However, 10 years have now passed since this came into force and the industry has grown and continues to grow faster than the economy in general. It is therefore perhaps time to revisit the EU’s role in its development, especially in light of new challenges, such as climate change. The study recommends the reinforcement of tourism organisational and financial structure within the EU by introducing a specific tourism budget.”

Sources: European Parliament, EP TRAN Committee, October 2019 *“European tourism: recent developments and future challenges”*

Second edition of the “UNWTO Global Report on Women in Tourism” highlights the industry’s progress and key role in the fight against inequality



On 7 November 2019, the World Tourism Organisation (UNWTO) launched the second edition of the “Global Report on Women in Tourism”.

The goal of the report was to examine the industry’s progress and potential in contributing to gender equality and to identify challenges and possible measures to mitigate inequality worldwide.

To this end, 5 thematic areas were examined – employment, entrepreneurship, education and training, leadership, policy and decision-making – in four world regions – Africa, Asia and the

Pacific, Latin America and the Caribbean and Europe.

The study came up with the following key findings:

- 54% of people employed in the sector are female (15% more than the broader economy);
- The wage-gap in the tourism industry is about 2% smaller than in other sectors;
- Women working in tourism have greater opportunities to cover leadership roles.

The report also highlighted technology’s important role in supporting women’s empowerment by providing them greater access to training opportunities and facilitating their access to the tourism market.

Mr. Zurab Pololikashvili, Secretary General of UNWTO, spoke of the key findings by saying that “tourism is leading the change for female empowerment all over the world. Across the private and public sector women are harnessing the potential of tourism to become financially independent, challenge stereotypes and start their own businesses” and also stated that “UNWTO is firmly committed to working towards UN Sustainable Developments Goal 5 – the empowerment of women and girls – and ensuring that tourism continues to be at the forefront of gender-equality efforts.”

Sources: UNWTO, 7 November 2019, “*Tourism Leading Other Global Sectors in Advancing Gender Equality, New Report Shows*”

UNWTO, 7 November 2019, “*Global Report on Women in Tourism*”



New President for association of “Maîtres restaurateurs”



At the end of November 2019, Mr. Alain Fontaine, owner of restaurant Le Mesturet and former Vice-President of restaurants in GNI, was elected as new President of the association of “Maîtres restaurateurs” (read GNI’s press release [here](#)).

In France, the title of “Maître restaurateur” is the sole official label with [strict specifications](#) recognizing diplomas, experiences and savoir-faire. The [French association of “Maîtres restaurateurs”](#) aims to gather restaurateurs with this official title and to promote the French handmade cuisine and excellence of service.



MARKETING & COMMUNICATION

Vilnius receives international gold award at WTM Travel Show in London for ad campaign



6 November 2019 – Vilnius, Lithuania. Vilnius, the capital of Lithuania, wanted to attract more attention amongst Western Europe’s millennials and to invite them to experience all the city has to offer. However, only 8% of the target audience in Berlin and London knew that Vilnius existed, let alone where it was. The city decided to go with a bold statement that earned the capital an International Travel & Tourism award.

“Vilnius – the G-spot of Europe. Nobody knows where it is, but when you find it – it’s amazing” campaign was developed by Jurgis Ramanauskas, Skaistė Kaurynaitė, and Ugnius Mikšta. Posters

advertising Vilnius appeared in London and Berlin in summer 2018. Since then, the website vilniusspot.com was visited by over 100 thousand people from all over the world while the searches on Google trebled.

According to Vilnius’ Mayor Remigijus Šimašius, the campaign reached an audience of 600 million and the number of tourists increased by 12%. “We may be small globally but really strong!” he said in a brief announcement.

The viral ad was since named as one of the best week’s campaigns by advertising industry magazine Lürzer’s Archive’, as well as earning a feature on “Last Week Tonight with John Oliver.”

“International tourism is a highly competitive field where only a few manage to stand out,” says Inga Romanovskienė, the head of the official development and business promotion agency Go Vilnius. “Even competing with the giants of tourism – such as Las Vegas – was a great achievement.”

This year’s International Travel and Tourism Awards, where Vilnius won the highest Gold Award, took place in London’s annual World Travel Market, visited by over 50 thousand attendees.





SUSTAINABILITY

New study from the European Parliament for the Committee on Transport and Tourism (TRAN) analyses the overtourism phenomenon in Europe



15 October 2019: the European Parliament published a study on overtourism upon request of the EP Committee on Transport and Tourism (TRAN), intending to better understand the phenomenon, assess its spread and the severity of the issues associated with it and determine policy measures to mitigate its negative effects.

To this end, the study identified six indicators (i.e. tourism density and intensity; growth of bed-night; share of Airbnb accommodation; share of tourism contribution to GDP; air travel intensity and closeness to airports; cruise ports and World Heritage sites) and analysed 29 EU and 12 non-EU case studies.

The analyses highlighted the following key issues:

- Lack of reliable and detailed data makes it difficult to identify a destination's state/risk of overtourism;
- Destinations impacted by the phenomenon are currently only a few, but its effects are severe (e.g. a city could lose its primary function as a residence and a cultural heritage site its touristic appeal);
- Using systems based on a growth paradigm to value the success of a destination (i.e. the higher the number of tourists, the more successful) impede national authorities to identify/mitigate overtourism;
- Although being largely included among the primary causes of the phenomenon, ICTs, social media and peer-to-peer platforms are still poorly addressed in the professional and scientific literature.

The study, therefore, proposes various recommendations to the Members of the European Parliament, among which:

- Promoting overtourism monitoring and identification of its evaluation methods and procedures;
- Advocating inclusion of additional overtourism relevant statistics in the current Eurostat tourism statistics monitoring system - as the European agency is currently failing to provide all relevant data;
- Encouraging rebalancing of a "growth paradigm" with a "regional development paradigm";
- Supporting a thorough assessment of the role of social media, digital and peer-to-peer platforms in causing overtourism;
- Emphasizing the need to develop economic policies;
- Advocating setting up of a European Overtourism Task Force.

However, overtourism is still a quite recent issue – as it emerged in its worrying form only a couple of years ago – and, for this reason, not only it is still at the very beginning of the policy cycle, but is still lacking systematic, precise and definitive research. The main suggestion is to continue more systematically to research the phenomenon.

Source: 15 October 2019, European Parliament, "Research for TRAN Committee – Overtourism: impact and possible policy responses"

UNWTO participates to COP25 and launches new study on transport-related CO₂ emissions in tourism



Leaders from around the world met in Madrid on 2-13 December 2019 for the UN Climate Change Conference (COP25) under the Presidency of the Government of Chile. The [World Tourism Organisation](#) (UNWTO) participated to the summit with a high-level delegation led by Secretary-General Zurab Pololikashvili, aiming at bringing tourism-related discussion at the heart of the summit – given the industry’s key role in the achievement of the [UN Sustainable Development Goals](#) (SDGs).

“UNWTO is proud to lead the efforts of the global tourism sector to deliver on climate response”, said Mr. Pololikashvili during the

Conference.

During the summit, UNWTO held an official high-level side event and launched its new study “[Transport Related CO2 Emissions of the Tourism sector](#)”. As the number of international and domestic tourists continues to rise, in fact, UNWTO believes it is important to present data on CO2 emissions produced by tourism transport, alongside the predicted growth in emissions to 2030.

According to UNWTO research:

- Transport-related CO2 emissions from tourism will increase by 25% between 2016 and 2030;
- In the same period, domestic and international tourist arrivals will increase from 20 billion to 37 billion;
- In 2016, transport-related emissions from tourism represented 5% of all men-made emissions. By 2030, they will increase to 5.3%.

This data further demonstrate how transport-related CO2 emissions in tourism will remain a major challenge – thus requiring to work closely with the transport sector and to further commit to accelerate the decarbonisation process. In addition, the tourism sector must determine its own high ambition scenario, complementing the efforts of the transport sector.

Sources: UNWTO, 2 December 2019, “[Tourism on the agenda as UNWTO welcomes fellow UN agencies and world leaders to Madrid for COP25](#)”

UNWTO, 4 December 2019, “[Tourism’s carbon emissions measured in landmark report launched at COP25](#)”

UNWTO and International Transport Forum, 4 December 2019, “[Transport-related CO2 Emissions of the Tourism Sector – Modelling results](#)”



The problem of food waste in tourist households in the hospitality sector



According to a study published by the University of Eastern Finland and the University of Southern California in October 2019, current efforts to prevent food waste in the tourism sector might not be enough to fully tackle the issue.

Food waste is a well-known economic, environmental and social problem. Every year, almost one-third of all food at a global level intended for human consumption (about 1.3 billion tons) goes to waste – and the hospitality industry is among the top sectors involved in this problem.

While being true that food waste originating from traditional touristic facilities (e.g. hotels and restaurants) can easily be calculated, we must also take into account tourism's changes in the last decade. The industry is becoming more and more diverse, is no more limited to conventional forms of travel - such as hotel stays and travel packages - and the sources of food waste in the sector are changing along.

To plan effective preventive measures, therefore, it is first of all necessary to analyse food waste in so-called tourism households (e.g. camping, couch surfing, Airbnb, etc.), to identify all sources and amount of food wasted, together with its drivers and strategies to reduce it and how it might change over time.

Source: eHotelier, 4 November 2019, "Food waste in tourism is a bigger issue than previously thought" Gretzel, U., Murphy, J., Pesonen, J. & Blanton, C., Tourism Review, October 2019, "Food waste in tourist households: A perspective article"



New partnership between GNI and Green Key

In September 2019, GNI has signed a new partnership with Green Key, French 20-years-old label for sustainable development.

The aim is to promote sustainable actions in hotels and restaurants in 7 categories: training, water, energy, wastes management, green purchasing, an awareness campaign for clients and living environment. GNI will be a member of the jury to reward establishments with performing, continuous and dynamic eco-friendly management.





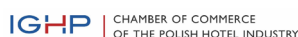
Hotel without plastic campaign



The Chamber of Commerce of the Polish Hotel Industry (IGHP) initiated in July 2019 the educational campaign “Hotel without plastic”.

The aim of the campaign is to increase the environmental awareness of hoteliers and to encourage good practices in reducing the volume of plastic waste in day-to-day hotel operations. IGHP prepared the guidebook with 30 practical tips on reduction and/or replacement of plastic in various areas of hotel activity, such as housekeeping, gastronomy, SPAs and wellness, front desk and many others.

These guidelines have been available for all Polish hoteliers on Chamber’s website as well in IGHP social media channels Facebook and LinkedIn.



Gremi d’Hotels de Barcelona to collaborate with Generalitat de Catalunya

On the sustainability side, Gremi d’Hotels de Barcelona is proud to announce to have signed a collaboration agreement with the Department of Work, Social Affairs and Families of the Generalitat de Catalunya with regards to the labour insertion of the refugees and the applicants of international protection.

Within the framework of this collaboration agreement, the Barcelona Hotels Association will promote the recruitment of these people in the hotels associated with the entity. Likewise, we will inform the Refugee Reception Committee about any job offer from our associated hotels that might be required.



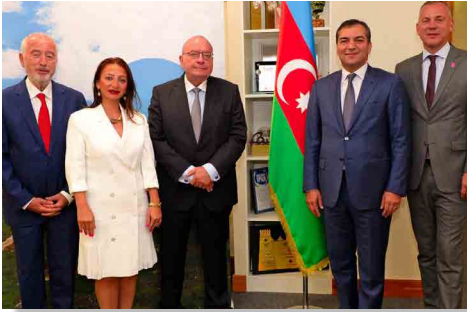
On the other side, the Department of Labour, Social Affairs and Families of the Generalitat de Catalunya will offer to these people, through the Employment Service of Catalonia, training courses related to the demand for employment of hotel establishments associated to the association.





EVENTS & TRADE SHOWS

Azerbaijan Hotel Association (AHA) had the pleasure to welcome HOTREC President, Mr. Jens Zimmer Christensen, during his September visit to Baku



From exploring of old Baku streets, to delicious trip to regions of Azerbaijan, Mr. President got the chance to unveil the beauty of Azerbaijani culture and try the tasty national cuisine and hospitality experience.

On 3 September 2019, the [Azerbaijan Hotels Association](#) (AHA) participated to the Azerbaijan Intour Summit in Baku where both Mr. Martin Kleinmann, the President of AHA, and Mr. Jens Zimmer Christensen, the President of HOTREC participated as keynote speakers. "Despite its young age," said Mr Kleinmann, "the Azerbaijan Hotel Association being part of this whole growth process

contributed quite a lot to the hospitality of Azerbaijan". Mr Kleinmann then mentioned AHA's projects and goals for 2020 (e.g. the establishment of a national star classification for hotels and maintaining European standards).

On 4 September, Mr. Kleinmann, Mr. Zimmer Christensen and Ms. Gunay Saglam, Secretary-General of AHA, had several meetings with government officials.

After meeting with Mr. Fuad Naghiyev, Chairman of the Azerbaijan's State Tourism Agency, and Mr. Florian Sengsts Schmid, CEO of the Azerbaijan Tourism Board, to talk about new tourism strategies, industry development and mutual exchange of best practices, the three had a roundtable with Mr. Mukhtar Babayev, Minister of Ecology of the Azerbaijan Democratic Republic, to discuss the efficient use of natural resources in the hospitality industry. Lastly, they met Mr. Gosghar Tahmazli, Chairman of the Azerbaijan Food Agency, who briefed them on the country's food safety standards and implementation, stressed the importance of AHA in the development of the hospitality industry in Azerbaijan and proposed to the Association the organisation of a joint project to increase the hoteliers' awareness on food safety standards.



HOTREC's 79th General Assembly in Croatia (17-18 October 2019)

On 17-18 October 2019, HOTREC Members met in Dubrovnik for HOTREC's 79th General Assembly – kindly hosted by the [Association of Employers in Croatian Hospitality](#) (UPUHH).

The General Assembly opened on the morning of 17 October with speeches by Mr. Jens Zimmer Christensen, President of HOTREC, Mr. Veljko Ostojić, President of UPUHH, and Mr. Frano Matušić, Secretary of State Ministry of Tourism of the Republic of Croatia.

During the statutory session, HOTREC Members voted for the admission of the [Serbian Hotel and Hospitality Industry Association](#) (HORES) – thus bringing HOTREC's Membership to 44 member associations in 32 European countries.





[Hostelería de España](#) and the [Bulgarian Hotel and Restaurant Association \(BHRA\)](#) were also admitted and will become HOTREC Members as of 1 January 2020.

During the rest of the day, HOTREC Members had a chance to discuss – among themselves as well as with external stakeholders – key challenges of the hospitality industry (e.g. Mr. András Baneth, Managing Director of the European Office at the Public Affairs Council and MEP István Ujhely, Vice-President of the European Parliament Committee on Transport and Tourism (TRAN), discussed about the new asset of European Institutions after the 2019 EU Elections and what this could mean for the industry).

On 18 October 2019, two new Working Groups had their kick-off meetings: the [Sustainability Working Group](#) and the [Coastal Tourism Working Group](#).



HOTREC Sectoral Social Dialogue Plenary meeting (29 November 2019)

On 29 November 2019, HOTREC and its trade union counterpart, the [European Federation of Food, Agriculture and Tourism Trade Unions \(EFFAT\)](#), held a plenary joint meeting of the Sectoral Social Dialogue Committee in Brussels, chaired by the European Commission.

During the meeting, HOTREC and EFFAT renewed their [Joint Statement on the Platform Economy](#) and launched a new [EU Online Interactive Risk Assessment \(OiRA\)](#) tool for the European hotel and restaurant sector.



The Joint Statement on the Platform Economy was first signed by the two Associations on 4 December 2015 and since then HOTREC and EFFAT continued exchanging views on the impact of the so-called “collaborative” economy during their SSD meetings. At the occasion of the renewal of the Statement, both partners expressed their concerns about the way the platform economy is currently growing – due to the often uncontrolled environment, despite several attempts at professionalisation and regulation. HOTREC and EFFAT, therefore, welcomed the [agreement reached on July 2019](#) by the European Commission and Airbnb and called on public authorities to take the necessary measures to further regulate the platform economy.

The SSD plenary meeting was also the opportunity for the two partners to launch the OiRA tool under the umbrella of the [European Agency for Safety and Health at Work \(OSHA\)](#). This online tool will serve hospitality business to assess their compliance to European legislation to health and safety standards at the workplace free of charge and will, therefore, contribute to increasing the sector’s adherence to EU legislation.





The Azerbaijan Hotel Association (AHA) gathered its members on 2nd General Assembly: a memorable occasion of its 1st ever anniversary (4 December 2019)



On 4 December the Azerbaijan Hotel Association (AHA) held its 2nd General Assembly. Carrying utmost importance, the 2nd General Assembly resembled the hospitality industry key priorities.

AHA shared its key achievements of 2019 and announced the milestones of 2020 to the hospitality industry.

“We believe that it is vital to introduce successful and established international best practices and standards, in order to make our destination globally competitive but also fully transparent to any traveller planning to visit our beautiful country” highlighted Mr.

Martin Kleinmann, the President of Azerbaijan Hotel Association.

Bringing the local, as well as international experts of hospitality and tourism industry together, event involved huge interest with topics like competitiveness and profitability of hospitality industry, best and worst strategies in pricing strategies, direct booking and its benefits, guest complaint management, competitive analysis of the region, future hotel product perspectives and many more.

For the first time, AHA announced the National Hotel Star Classification implementation process to the hospitality industry. Azerbaijan Hotel Association cooperated with fellow Association of Switzerland to establish the base of National Hotel Star Classification in Azerbaijan and Mr. Thomas Allemann, Member of Management Board shared the experience of Swiss Hotel Association, history of HotelStars Union, and gave the comparison of Azerbaijan and Switzerland Hospitality Industry.



WHAT'S NEW IN HOTREC MEMBERSHIP

Bernard Zenzerović new CEO of the Association of Employers in Croatian Hospitality

On 14 October 2019, the Association of Employers in Croatian Hospitality (UPUHH) welcomed a new Chief Executive Officer, Mr Bernard Zenzerović.

Before taking over as Chief Executive Officer at UPUHH, Mr Zenzerović worked as executive director at MPR group responsible for a project of restructuring and strategic management for the Jadranka Group – one of the leading companies in the tourism and hotel sector in Croatia. Previously he worked as head of Investment and Management Office for Karisma Hotels Adriatic, where he came from Ministry of tourism where he served as Secretary of the Cabinet of Minister of Tourism in Croatian Government. He was sitting in supervisory boards of Croatian National Tourist Board and hospitality company Brijuni Rivijera. He finished executive programs in business management and hotel investments at Harvard and Cornell University.



“My main goal is to improve services provided by UPUHH. I will be devoted to strengthening relationships with our members as well as with national and international stakeholders. Special accent in UPUHH’s program will be on promoting sustainability, innovation and digital transformation. I am hopeful for UPUHH to contribute to strengthening these values.”





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