

HOTREC

The voice of the European **hospitality** industry



Presentation By
Marie Audren
Director General of HOTREC

HHRA General Assembly
Balatonfüred, 15 Nov. 2023

Hotrec
Hospitality Europe

HOTREC members

Our members

47

National associations

36

European countries

Types of membership

Full member

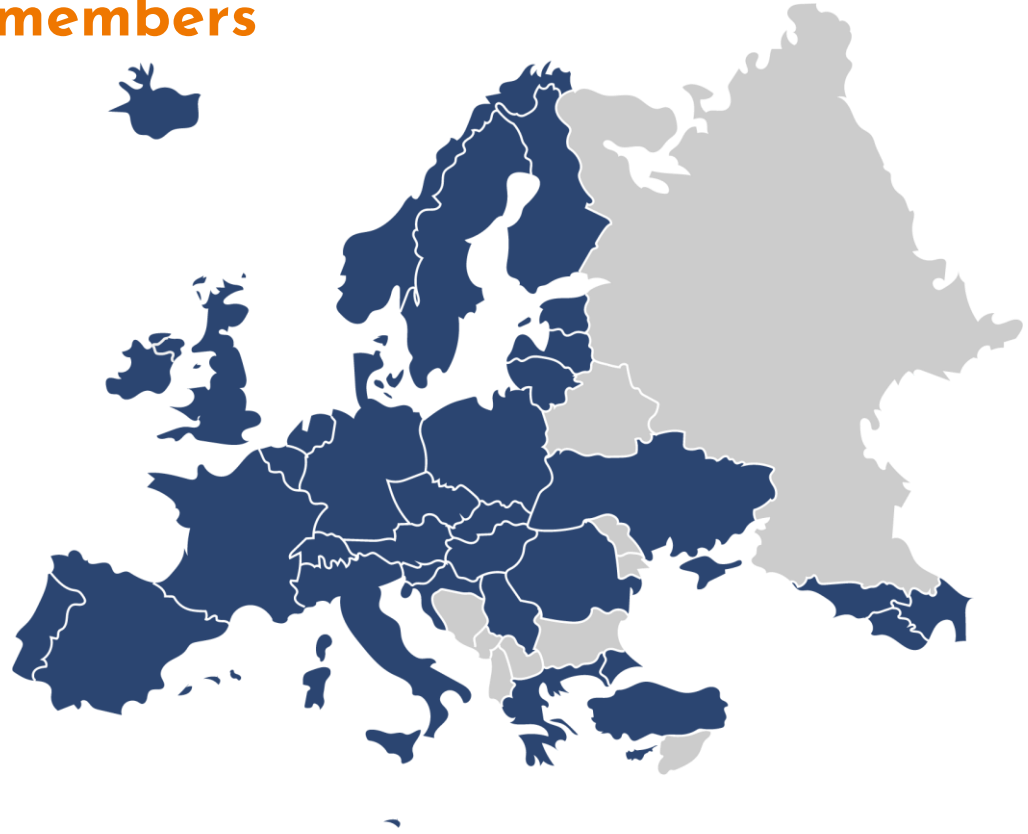
EU member states

Associate member

European Economic Area

Observer

Future EU members



About **HOTREC** | Organisation

- **General Assembly:** Highest decision-making body, bringing together representatives from all associations.
- **Executive Committee:** President, Vice-President, Treasurer and 8 members elected by the General Assembly with a two-year mandate -
President: Alexandros Vassilikos, President Greek Chamber of Hoteliers
- **Secretariat:** Brussels-based Secretariat in charge of day-to-day activities of the association
- **Committees & Working Groups:** In charge of specific policy areas, they meet several times every year to discuss and formulate HOTREC policies
- **Hotel Stars Union:** close partnership with HOTREC

About HOTREC | Our mission



HOTREC is the voice of the European hospitality in Europe

As the platform of European hospitality associations, we promote the **key role** of the hospitality and tourism sector in Europe. We act as a **forum for exchange** and help advance a regulatory framework and a business environment in which we can deliver the most value to European **society** and **economy**.

Discover **HOTREC** | Our vision

Our **strategic** vision: the **four pillars** of HOTREC's action



EU & Int. Relations

HOTREC is the representative of the sector towards the EU & int. institutions



Advocacy & Outreach

HOTREC is the voice of hospitality and an active key player in tourism in Europe



Member Services

HOTREC is a community of peers, serving their collective interests through joint initiatives & programs

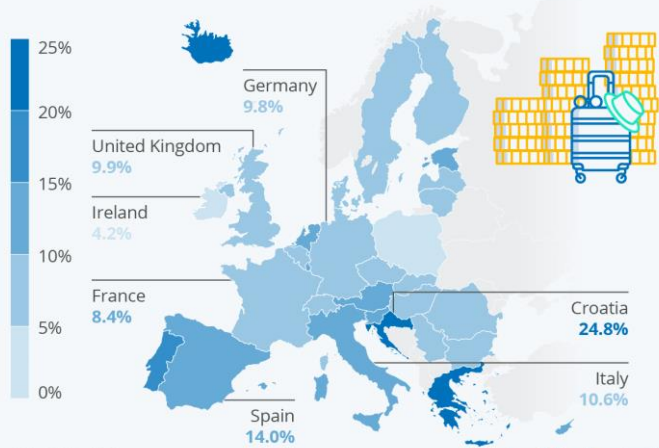


Inspire Leadership

HOTREC as a hub for information sharing, aggregation & for key industry initiatives

TRAVEL AND TOURISM CONTRIBUTE GREATLY TO EUROPE'S ECONOMIES

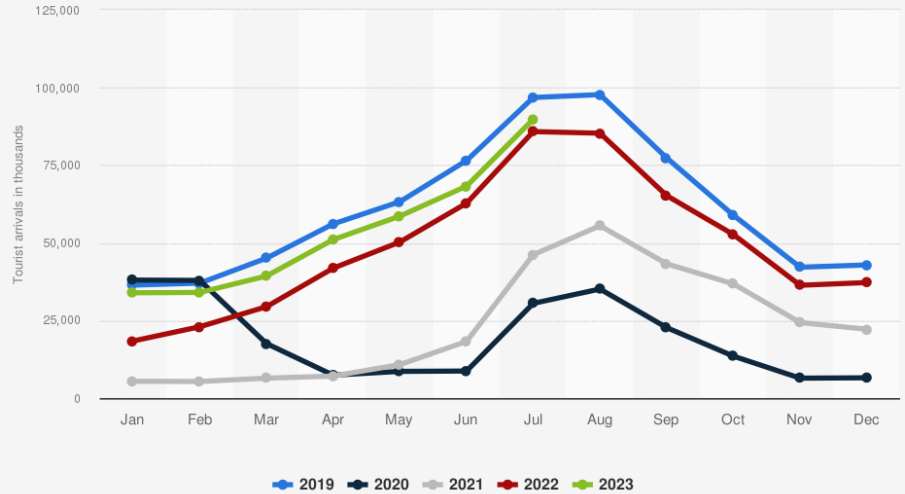
Share of national GDP generated by travel and tourism in the last pre-pandemic year (2019)



Source: World Travel & Tourism Council (WTTC)

statista

Number of international tourist arrivals in Europe from January 2019 to July 2023 (in 1,000s)

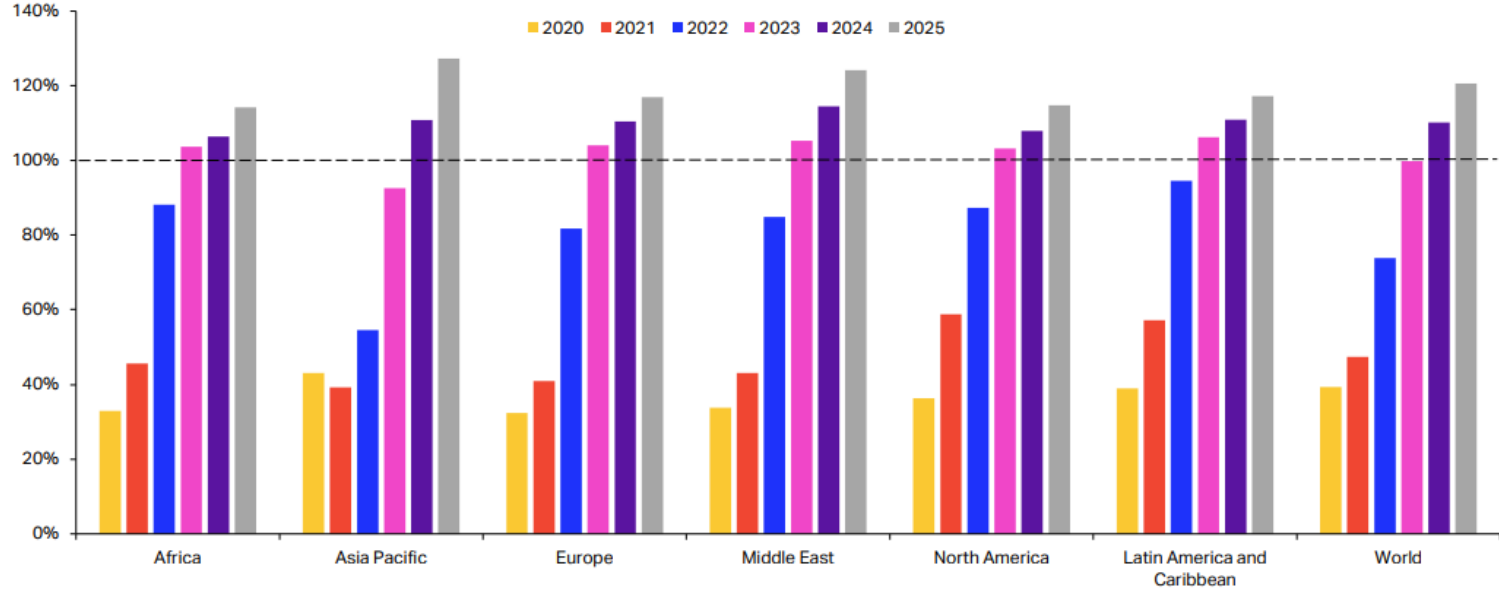


Source
UNWTO
© Statista 2023

Additional Information:
Europe; UNWTO; January 2019 to July 2023

European Tourism 2023

Chart 24: Passenger traffic forecast by region, % share of 2019 levels

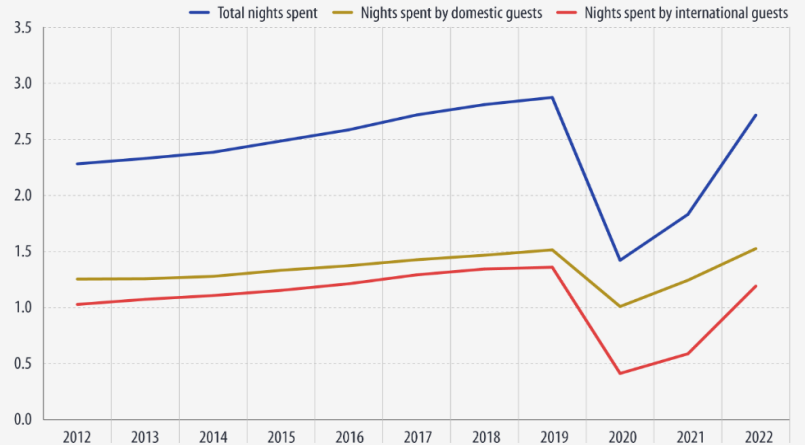


Source: IATA Sustainability and Economics/ Tourism Economics

- 2 million companies (90% of them are micro-enterprises)
- 10 million jobs, 20% aged under 25
- 3 % of the GDP in EU
- Impact on a huge and diverse supply chain

Nights spent in tourist accommodation in the EU, 2012-2022

(billions)



2022 EU aggregate: estimated using available monthly data.

HOTREC Members survey 2023

- ✓ Attracting and retaining the workforce in the sector (lack of labour force / lack of skills) - **31%**
- ✓ Cash flow / Loan terms - **10%**
- ✓ Extreme high temperatures and natural disasters - **6%**
- ✓ Geopolitical situation - **7%**
- ✓ Increase in energy and food prices - **30%**
- ✓ Other - **15 %**

Policy priorities



Digital

Creating the best conditions for hospitality venues to thrive in an increasingly **digital** world



Sustainability

Working together towards a **carbon-neutral** hospitality



Social Affairs

Calling for a **well-trained** workforce to lead the sector through upcoming challenges



Resilience

Helping hospitality increase its **resistance** to future tourism-related shocks

Policy priorities - Distribution

WE WANT
TO HEAR
FROM
YOU!

Implementation of Digital Market Act

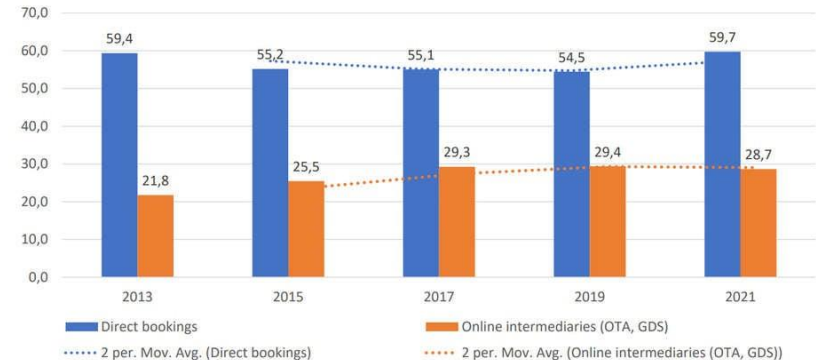
- ✓ **Booking** - Designation likely in Q1 2024 - Parity clauses & Access to data
- ✓ **Google search** - New display of hotel search results - Risk : hotel websites to be pushed down the search order

NEW HOTREC Distribution study - Jan. 2024

Hotrec
Hospitality Europe

Evolution of direct bookings and bookings via
online intermediaries in Europe 2013 - 2021

Hes-so
VALAIS
ROMANDE



Values from overall sample. Market shares in % of overnights.

Strat. of Management | 19

Policy priorities - Short Term Rentals

In 2022, more than 547 million nights were booked via collaborative economy platforms - Paris was the most popular city (Eurostat)

Platform tourism exceeds pre-pandemic baseline in 2022, (Eurostat)

HOTREC

Position Paper on EU-wide Regulation of Short-term Rentals (Full Report)



EU Legislation on STR - Registration & data sharing
VAT Proposal : STR platforms to collect and remit VAT if a host is not registered

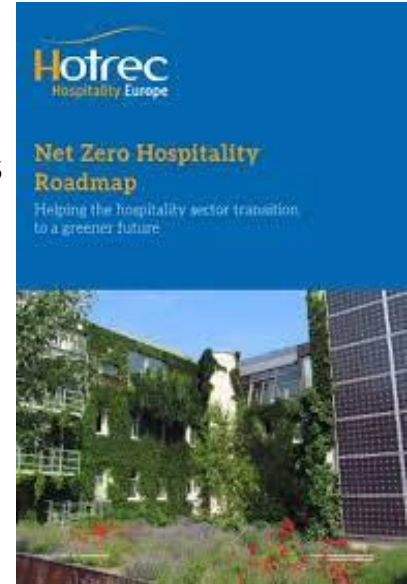
Policy priorities - Sustainability

HOTREC Sustainability Action Plan

- ✓ Support and promotion of good and sustainable practices
- ✓ Promotion of the use of energy-efficient products and renewable energy sources
- ✓ Actions to reduce food waste in the sector
- ✓ Promotion and development of skilled labour through training and career development

HOTREC Net Zero Hospitality Roadmap

HOTREC PEFCR for the hotel accommodation sector - Need Hotels on board !!!



Policy priorities - Circularity

Hospitality businesses only generates a **share of 9% of the food waste** produced by all food services together. The sector acts responsibly and is committed to further improve its track record.



- ✓ heterogeneous nature of the hospitality industry, seasonality, national specificities, and consumer behaviours.
- ✓ a service-centred industry aiming to create positive experiences and provide the best options and choices to its customers.

HOTREC in action - What's next

20 Nov. 2023: European Year of Skills - HOTREC - EFFAT joint Event

29 Nov. 2023 - European Hospitality Day Launch of HOTREC Manifesto for EU Elections

24 - 26 April 2024 - HOTREC General Assembly - Budapest

16 - 18 April 2024 - HOTREC General Assembly - Warsaw



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