

2016 | 2017 HOTREC ANNUAL REPORT



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MISSION

HOTREC is the umbrella Association of Hotels, Restaurants, Pubs and Cafes and similar establishments in Europe, which brings together 41 National Associations in 29 countries.

Our mission is to promote the hospitality industry's contributions to European society and represent, protect and defend its interests to the European Institutions.



FOREWORD

Dear Readers,

It was just a year ago when I addressed you here, in HOTREC's Annual Report. Despite being a world leader, EU tourism still needs to face many challenges.

Businesses still need our support to access finance. We have a lot of work ahead to improve the reputation of tourism careers. Professional skills need to be developed on the basis of curricula that meet the needs of the industry. Consumer expectations are changing faster than ever and we witness the rapid evolution of new business models. Competition from emerging destinations remains strong and Europe continuously loses its market share. In addition to all these, our continent and destinations are suffering from the aftermath of last year's terrorist attacks.

It is essential that we work together to help the industry in facing these challenges and to preserve Europe's position as the world's top tourism destination.

In the Commission, we adapt actions to tackle new challenges and help the sector enhance its competitiveness.

First, we continue helping SMEs to use new and existing financial resources smarter. We have organised several events, also in cooperation with our stakeholders, devoted to exchanging good practices on the use of the EU funds and programmes, such as the Juncker Plan, the Structural Funds and the COSME Programme. We updated our ["Guide on EU funding for the tourism sector"](#) and published it in all EU languages.

Second, under the [New Skills Agenda for Europe](#), we are working to establish a sectorial cooperation aiming at matching tourism education with the skills needed by the industry, so that tourism careers become more attractive and prosperous for young professionals.

Third, we keep on supporting tourism SMEs in their use of digital and online tools. We are updating the Tourism Business Portal and will soon publish a new series of webinars on digital and online marketing skills for tourism entrepreneurs.

We keep a close eye on the development of the collaborative economy. In June last year, we published the [European Agenda for the Collaborative Economy](#). It provides horizontal guidance on how existing EU legislation should apply to new business models. Furthermore, we are now organising sector-specific workshops on collaborative economy in the tourism accommodation sector, in which HOTREC plays a key role by representing the EU hotel industry.

The 2018 EU-China Tourism Year and the European Year of Cultural Heritage are excellent opportunities for Europe to attract more visitors, especially from third countries' markets. We will give more visibility to our destinations and highlight Europe's cultural heritage and creativity.

Finally, we work with our public and private stakeholders on ways to increase our preparedness to react in front of security incidents, while continuing to raise the profile of Europe as a high-quality and safe tourism destination.

The role of industry associations is very important in the success of these initiatives.

I thank HOTREC for their cooperation in several actions, for example on skills, digitalisation and the collaborative economy workshops. HOTREC continues to be the key partner for us in the implementation of our initiatives.

by Mrs Elżbieta
Bieńkowska,
Commissioner
for Internal Market,
Industry,
Entrepreneurship
and SMEs



"HOTREC continues to be the key partner for us in the implementation of our initiatives"

MESSAGE FROM MR. TALEB RIFAI, SECRETARY GENERAL OF THE WORLD TOURISM ORGANISATION (UNWTO)



"This year marks the end of my time as UNWTO Secretary-General, yet the strong partnership between UNWTO and HOTREC continues in several priority work areas"

Over the past decade or so, tourism has cemented its position as one of the world's most important and impactful socio-economic sectors, growing in relevance for millions around the world as a passport to prosperity, peace and understanding among people of all walks of life.

From 809 million in 2005, international tourist arrivals soared to a new historic record of 1,235 million in 2016. Last year was the seventh consecutive year of above-average growth in people visiting other countries for tourism, and bringing benefits to countries, communities and societies.

Europe, the world's most visited region, received 10 million more international tourist arrivals in 2016 than in the previous year, totalling 620 million arrivals – over half the world total. Nearly 500 million visited the EU-28, which reported growth of 4.6% in 2016. 2017 is expected to bring further growth of 2% to 3% to the Europe region.

In terms of European tourism spending, Germany, the United Kingdom, France and Italy all reported growth in outbound demand in 2016. Growth in outbound travel from these countries, and from long-haul markets such as China and the United States, strongly benefited many destinations in Europe.

Building on the increasing commitment of the tourism sector to take responsibility to contribute to the 2030 Agenda for Sustainable Development, 2017 is being celebrated as the International Year of Sustainable Tourism for Development. This is a prime awareness-raising opportunity, at the highest political level, of tourism's role to contribute to the three pillars of sustainability – social, economic and environmental – as well as to global peace.

Such a contribution can only be realized with the help of partnerships, which is why UNWTO is very pleased to count on the longstanding and firm relationship with HOTREC.

This year marks the end of my time as UNWTO Secretary-General, yet the strong partnership between UNWTO and HOTREC continues in several priority work areas. I trust it will continue to bolster the hospitality industry in Europe and its growing contribution to a more inclusive, equitable and sustainable tourism sector for people and planet.



INTRODUCTION BY HOTREC PRESIDENT AND CHIEF EXECUTIVE OFFICER



Taking Europe's competitiveness one step ahead: a crucial year of actions led by HOTREC & the tourism sector

Christian de Barrin, CEO, and Susanne Kraus-Winkler, President

In a challenging global context, the past 12 months saw European leaders even more aware of the role of tourism as a catalyst for jobs and growth, thanks to the work done by the EU Institutions, the Network for the Private Sector for Tourism (NET), and the United Nations, celebrating 2017 as the International Year of Sustainable Tourism for Development, in which HOTREC is playing a substantial role.

HOTREC kept on taking strong initiatives to further engage the industry into innovation and create the conditions for a competitive and sustainable European tourism sector.

The Digital Single Market Strategy's mid-term review provided HOTREC with the opportunity to further promote its benchmarks to develop a fair and transparent online market for consumers and suppliers. Indeed the accommodation booking market, ruled for 90% in Europe by two platforms only, require an unambiguous commitment by platforms for transparency towards the 200,000 hotels, and the 1.8 million restaurants, pubs and cafes which will be subject to the same unfair market conditions if measures are not taken urgently.

The lack of support from peer to peer platforms to legalise the so called collaborative economy, has not only increased unfair competition to the regulated accommodation sector, but has also impeded its capacity to invest. HOTREC applauds Commissioner Bienkowska's initiative to bring together EU Member States and the industry to define guiding principles to level the playing field and set the conditions for a vivid tourism sector.

Two major projects marked HOTREC's steps ahead: the EU funded project AppTourYou aimed at better promoting services for people with specific needs, and the development of guidelines to further reduce food waste and foster food donations in order to better meet the requirements of the Circular Economy.

Most recently, HOTREC's contribution to the EU discussions on the VAT regime reform through its policy report showed how low VAT rates for hotels and restaurants foster job creation, growth and investment.

Last but not least, the industry has further embraced innovation, e.g. robotics, and engaged in improving the experience of guests by bringing together the values of the European hospitality industry and the new market requirements driven by digitalisation and societal change.

We would like to thank HOTREC Members for their ongoing support, among which the Icelandic Travel Industry Association which joined us recently, the European Institutions for their commitment to tourism, the UNWTO and its Secretary General Mr Taleb Rifai for his leading role in making tourism a catalyst for peace, as well as our many project partners, among which ETC, NET, NECSTouR, the European Federation of Food Banks, UEAPME and Metro.

CORE POLICY ACHIEVEMENTS AND ACTIVITIES



HOTREC constantly strives to develop services to its Members that achieve measurable results for the benefit of the industry in Europe. With this goal in mind, HOTREC conducted various activities and successfully reached a broad number of policy achievements in 2016/2017.

A strong advocacy campaign to keep facilitating tourist arrivals from the US and Canada

As the European Parliament threatens to request the end of the visa waiver system for American and Canadian citizens entering the Schengen zone, due to a lack of reciprocity applied to some Member States, HOTREC together with NET (Network for the European Private Sector in Tourism) and the European Travel Commission conducted a large advocacy campaign towards the Members of the European Parliament to keep the system in place. The campaign stressed the dramatic economic consequences a temporarily suspension of the visa waiver for US and Canada citizens would have on the European tourism sector (e.g. a potential annual 22% drop in visitors to the EU, a loss of EUR 6.8 billion annually, a potential loss of 140 000 jobs in the tourism industry). Moreover, the risk of retaliation measures would be rather high.

As a result, the Canadian government announced that the visa waiver would be in place from 1 December 2017 to all Schengen countries. Moreover, the European Commission confirmed in March 2017 that it will continue diplomatic talks with the U.S. government to make them apply the visa waiver regime to the remaining Member States (Poland, Cyprus, Bulgaria, Romania and Croatia) as soon as possible.

Making EU consumer and marketing legislation fit for the new tourism sector

HOTREC also regularly engaged with the European Commission about the Fitness check of the EU consumer and marketing law acquis. The aim of this fitness check is to assess whether the main EU 6 Directives regulating consumer protection are still fit for purpose in terms of effectiveness, coherence and relevance.

As part of this process, HOTREC shared with the European institutions its expertise about the digitalization of the tourism sector and identified several areas where the current EU legislative framework shall be further improved, such as:

- The application of existing consumer legislation to the "collaborative" economy, in order to ensure that consumers are protected, whatever the identity of the service provider is;
- A better protection of consumers against misleading claims by online platforms;
- The need to offer a form of protection to small businesses contracting with dominant commercial partners.

By implementing those changes, the European Commission would ensure a fair level-playing field for all business operators.



HOTREC is campaigning to keep increasing tourist arrivals in Europe by promoting a dynamic visa policy while keeping security the number 1 priority

Online distribution – fair competition and transparency must prevail

The dominance and concentration of online platforms is constantly increasing. HOTREC carried out in July 2016 for the second time a study on distribution of hotel rooms with the Swiss University of Valais. This study shows that Booking.com controls almost 2/3 of the hotel bookings. Together with second placed Expedia they have a market share of over 80%. Having these 2 giants on the one hand and the 200.000 hotels on the other, there is no question about the division of the roles in the market.

HOTREC raised European institutions' awareness about unfair competition and unfair commercial practices

HOTREC actively voiced out many unfair practices related to booking platforms. As a result, the European institutions are more and more acknowledging the unfair practices enterprises have to face when dealing with platforms, besides the opportunities they are offering. This is the reason why the European Commission decided with its Communication on platforms in May 2016 to launch investigations on unfair B2B practices. Besides the Communication, further interpretation of the Unfair Commercial Practices Directive was published, clearly stating inter alia, that platforms have to clearly mark sponsored search results, e.g. in the form of paid for rankings. In fact, several similar unfair practices pointed out by HOTREC are not only misleading consumers, but are also damaging businesses, by the lack of transparency of platforms towards their suppliers (i.e. hoteliers).

Commission acting on misleading travel booking websites

In April 2017, the European Commission also stepped-up against some misleading practices identified in the course of an investigation of 352 travel platforms. This reflects the demands HOTREC voiced out over the past years about platforms and online Travel Agents, but further enforcement efforts are needed to establish a fair market both for consumers and businesses. Besides the institutions' stronger recognition of the problems with platforms in Europe, hoteliers in Austria can, similarly to their colleagues in Germany and France, finally enjoy their basic entrepreneurial freedom to be in control of their offer. The Austrian Parliament adopted in November 2016 a modification of the law on unfair commercial practices, banning parity clauses from contracts between hotels and Online Travel Agents, thus allowing hoteliers to set freely the conditions for selling their own services on their various distribution channels, also constituting a benefit for customer.

HOTREC and its Members will keep on striving for fairer and better conditions for hospitality enterprises in online distribution.



The European institutions are more and more responsive to the unfair commercial practices faced by hospitality enterprises and shall implement measures within the mid-term review of the Digital Single Market strategy

Shedding light on the way forward to develop a responsible and fair so-called 'collaborative' economy

On 2 June 2016, the European Commission adopted a Communication on the 'collaborative' economy setting some general guidelines for Member States with regard to European legislation. Acknowledging the specific concerns related to collaborative type of tourist accommodation, the European Commission launched in 2017 an assessment to develop more specific sectoral guidelines for this specific sector. At the same time, the European Parliament launched an own-initiative report, which will be adopted at the end of April 2017. HOTREC has been an active contributor, as it regularly engaged with EU policy makers in charge of these activities, by providing data and information on the impact of the collaborative economy on the tourism sector.

HOTREC brought its expertise to public authorities in Europe

In order to better focus the discussions on the key concerns the collaborative economy raise, HOTREC reviewed and updated its key positions, and published on 14 February 2017 its Policy Chart including 5 key pillars for a responsible and fair 'collaborative' economy. These pillars include the call for:

- The official recognition of the activity through an online registration,
- A clear distinction between professionals and individuals,
- A clear fiscal framework which ensures taxes due are paid,
- The health, safety and security of users / consumers being properly ensured, and

- All players, including service providers, platforms and authorities being committed to transparency and to act responsibly.

HOTREC also actively participates to the workshops organised by the European Commission which will elaborate, together with the Member States, specific guidelines for the collaborative type of tourist accommodation. HOTREC is a strong contributor to the political debate at EU and national level by participating constructively to the many fora and high-level events organised to seek for a virtuous model.

Positive steps are now taken by public authorities across Europe

Thanks to the efforts of HOTREC and its Member Associations, more and more destinations implement control in the collaborative economy market. In France, the new Digital Law requires platforms to make a distinction between private and professional service providers, in order to increase transparency for consumers. In Amsterdam, after failing to enforce the legal threshold for collaborative tourist accommodation, the biggest short term renting platform finally agreed, upon pressure from the public authorities, to control the offer on its platform and enforce compliance with the city's regulations.

HOTREC believes that these positive examples are to be followed by other destinations as well, in order to have a clear, responsible and fair market regarding the short-term accommodation rental.



"I thank HOTREC for their cooperation in several actions, for example on skills, digitalisation and the collaborative economy workshops"

Elżbieta Bieńkowska, Commissioner for Internal Market, Industry, Entrepreneurship and SMEs

Promoting a responsible restaurant industry through the reduction of food waste

Today one third of the food produced every year is thrown away. To tackle this problem, the 28 EU Member States committed in September 2015 in the United Nations to halve per capita food waste by 2030, as part of the U.N Sustainable Development Goals, while the European Union is currently developing many activities to help Member States fulfil this pledge.

An active contribution to EU activities on food waste reduction

The hospitality industry is a small waster of food¹, as it generates only a share of the waste produced by the food service sector (12%), while the bigger wasters are households (53% of the total food waste in Europe) and the processing industry (19%). Despite this excellent track record, HOTREC actively engaged in the EU activities about food waste reduction to help the industry achieving high levels of sustainability.

For instance, HOTREC joined in November 2016 the newly created EU platform on food losses and food waste. By bringing its expertise, HOTREC is helping the EU institutions in the elaboration of various policy documents on food donations and food waste measurement. This will ensure that the needs and constraints of SMEs in the hospitality sector will be accurately reflected, therefore reducing red-tape, while helping enterprises reducing food waste.

With the same objective in mind, HOTREC also contributed to the debate on the revision of the Waste Framework Directive and to the European Parliament own-initiative report on food waste reduction, by advocating flexible targets for food waste reduction, a focalisation on big wasters, and the promotion of financial incentives to help enterprises reduce their food waste.

HOTREC developed concrete tools to help restaurants

HOTREC also engaged with other stakeholders active on food waste reduction. This resulted in the conclusion of a framework agreement with METRO and the European Federation of Food Banks (FEBA), which foresees regular exchange of best-practices.

Besides, HOTREC developed a new brochure containing a set of guidelines which any hospitality establishment can follow to reduce its food waste, some recommendations to help businesses managing donations to charitable organisations, as well as best-practices examples developed by HOTREC members to help the industry reducing food waste. The brochure was officially presented in a successful event organised in the European Parliament at the kind invitation of MEP Biljana Borzan.

These actions are clear examples of how HOTREC helps hospitality businesses achieving a high level of environmental and economic sustainability, through the saving of resources, while contributing to a positive EU legislative framework for businesses.



"We acknowledge the initiative taken by HOTREC, the European Federation of Food Banks and the retailer METRO AG to sign a Framework Agreement to formalise cooperation to reduce food waste and further engage in food donation"

Xavier Prats Monné, Director General of DG Santé,
European Commission

¹ See FUSIONS report "Food waste data set for EU-28"

HOTREC's practitioners support the EU institutions in developing concrete solutions to reduce acrylamide in food



HOTREC actions contribute to help restaurants serving safer food, while avoiding un-necessary red-tape

Acrylamide is a chemical that naturally forms in starchy food products during every-day high-temperature cooking (frying, baking, roasting, etc.) and which usually appears during the 'browning' of the food.

In light of the conclusions of the recent European Food Safety Authority's opinion highlighting the carcinogenic effect of acrylamide, the European Commission started investigating on how to ensure a reduction of acrylamide levels in food. Given that many food commonly cooked and served by restaurants (e.g. french-fries, bread, etc.) are directly concerned by EFSA's health warning, HOTREC engaged with the European Commission and brought expertise to help the EU regulate the matter.

A Code of Practice to ensure restaurants serve safe meals

Starting from the acknowledgement that the vast majority of hospitality businesses serving food are micro-enterprises (i.e. employing less than 10 people) which do not (and cannot) use industrial standardized processes but rather opt for more authentic and home-made type of cooking, HOTREC elaborated a number of mitigation measures that restaurants shall follow to reduce acrylamide contents.

These mitigation measures are contained in a Code of Practice (CoP) for the hospitality sector on the two main kind of products served by restaurants containing acrylamide: French fries and bread/bakery products. It contains a set of mandatory measures (e.g. temperature for potato storage, maximum temperature for frying, display of a colour guide in kitchens to avoid over-cooking) together with recommendations, which can be used by all restaurants, depending on their characteristics and the type of food served (e.g. advice on cooking oil, fermentation time for bread, etc.). The mixture of mandatory and recommended measures ensure that all restaurants will be able to use the HOTREC CoP to reduce in practice acrylamide contents below safety thresholds.

A source of inspiration for the European Commission

Following the numerous discussions held with the European Commission and the representatives of the EU Member States on the measures proposed by HOTREC for the hospitality sector, HOTREC's expertise was positively recognized. As a result, the mitigation measures proposed in the HOTREC Code of Practice are directly used by the EU institutions when drafting their upcoming legislation to reduce the presence of acrylamide, either through the official recognition of the HOTREC CoP, or through a direct incorporation of its content into the body of the future legislation. HOTREC actions therefore contribute to help restaurants serving safer food, while avoiding un-necessary red-tape.

Low VAT for hospitality and tourism services boosts jobs, growth and investments in the EU

The EU's share of international tourist arrivals has been steadily declining from 53% in 1990 to 40% by 2015. For tourism receipts, the EU is only second behind Asia and the Pacific region, while the growth rates in receipts are lagging behind those from other parts of the world. These figures show unambiguously that Europe needs to work on its competitiveness on the global tourism market.

HOTREC's report shows that Europe benefits from low VAT on tourism services

Based on an assessment of the situation, HOTREC developed a report analysing the impact the levels of VAT rates have on job creation and competitiveness of the hospitality sector in the EU. The report was based on several official sources of data and studies.

HOTREC's report, published in April 2017, clearly shows that recent VAT reductions across Europe have positively impacted the economy. Tens of thousands of new jobs have been created, bringing people in employment and thus helping also the treasuries by strengthening the social security contributions and allowing for social welfare savings. The report also shows how low VAT can boost investments in the sector. Significant investments in products and services are key to improve the quality of the offer and thus positively influence global competitiveness of Europe as a destination. The combination of investments in quality and keeping prices at a low level, thanks to a low level of VAT, contribute to a good value for money for visitors and thus attracting tourists to Europe.

In fact, 25 out of 28 EU Member States make use of the possibility to apply a reduced VAT rate to accommodation services, while 17 out of 28 do so for restaurant services. This is a strong indication of the necessity to keep the possibility to apply low VAT rates for the hospitality and tourism industry for the long-term, not to jeopardise Europe's position on the global tourism market as well as the millions of jobs the sector is providing.

HOTREC VAT report is a useful tool for policy makers across Europe willing to boost competitiveness simply by keeping VAT rates low

Considering the relative decline of Europe's market share on the global tourism market, governments and politicians in Europe need to take measures to improve Europe's competitiveness. Given the clarity of its conclusions, the new HOTREC VAT report is a useful tool that European institutions, governments and national hospitality associations should use to promote growth and jobs in a key sector of the economy, which already directly contributes to 4% of European GDP and employs directly more than 10 million people.



"We much welcome this report by HOTREC as we trust it will provide an important contribution to the ongoing discussion on taxation and its impact on competitiveness in the tourism sector"

Taleb Rifai, UNWTO Secretary General



HOTREC is working to ensure that the UNWTO Convention will provide a global level-playing field protecting all tourists, whatever the type of tourism accommodation they choose

Contributing to the definition of an international framework for the protection of tourists

In the wake of the Icelandic volcano ash cloud crisis which hit Europe in 2010, the United Nations World Tourism Organisation (UNWTO) received the mandate from its State Parties to work on the elaboration of an international convention which would define a global standard for the protection of tourists while clarifying the rights and obligations of tourism service providers.

HOTREC brings its expertise to the working group drafting the future UNWTO Convention

In its quality of affiliate member of the UNWTO, HOTREC joined the UNWTO working group in charge of preparing the draft UNWTO Convention. In particular, HOTREC brought its expertise in all matters relating to package holidays and tourism accommodation services, which are already extensively regulated in Europe, both at EU and national level. HOTREC's contribution was key to develop the annexes of the future convention dealing with these specific services, while ensuring that the future text will strike the right balance in the rights and obligations of tourists and tourism service providers, and provide a fairly high level of tourist protection. HOTREC's input was also instrumental in avoiding inconsistencies between the future Convention and the existing EU legislative framework.

Working for an international level-playing field protecting all tourists

HOTREC's contribution was also crucial to ensure that the rise of the collaborative economy in tourism accommodation services is taken into account when elaborating the specific rules of the future international convention dealing with tourism accommodation services. Indeed, many national legislation protecting consumers and/or tourists around the world were conceived at a time when the collaborative economy either did not exist or was still at an infant stage. However, it becomes every day clearer that the market share of tourism accommodation services offered through collaborative economy platforms become every day more important. For instance, while there is approximately 13 million beds available in the classical regulated accommodation industry (i.e. hotels, apart hotels, gîtes, B&B, pensions, motels, etc.) in Europe, there is already 20 million beds available on collaborative economy platforms.

HOTREC is therefore extremely active to ensure that the future UNWTO Convention fully reflects that changing reality and provide a level-playing field protecting all tourists, whatever the type of tourism accommodation they choose.

HOTREC puts skills shortages at the core of the EU political agenda

The hospitality industry is a critical sector for the EU economy, as its 1.8 million enterprises employs 10.2 million people. It is also one of the few sectors which still recruits tens of thousands of employees every year.

A skills gap which prevents the sector from recruiting

Despite its excellent performances, the sector suffers from a skills gap, as it struggles to recruit the new employees it needs, despite high unemployment in many EU countries. Indeed, while the average job vacancy rate in the EU is of 1,7%, in the accommodation and food sector it reaches 3% in Belgium, 4.2% in Germany and even 7% in Greece. This is largely due to a strong skills shortage (lack of digital skills, qualified chefs, knowledge on foreign language and lack of qualified personnel to adapt to the different client's cultural habits and needs).

HOTREC launched a campaign to raise the EU's awareness on the skills gap

To overcome the problem, HOTREC launched an advocacy campaign aimed at placing the issue of skills shortage at the heart of the EU political agenda by disseminating its message in high level conferences and events organized by the EU institutions, such as: the "High Level Conference – Attracting investment in Tourism" (5 April 2016), the Conference on "Successfully finding and retaining apprentices" (20 June 2016), the HOTREC/UEAPME joint event on "How to make SMEs a driver for job creation in the EU: the example of tourism" (30 November 2016), the European Business Forum on Vocational Training (8 December 2016), the Conference on "Promote the necessary skills to develop the industry competitiveness" (2 February 2017), the European Commission hearing on a quality framework for apprenticeships (30 March 2017), etc.

As a result of this campaign, the European Commission released a study on "Mapping and performance check of the supply side of tourism education and training" and its "New Skills Agenda for Europe", which identify the main skills gap in the tourism sector and propose solutions to address it. Besides, EU funds were specifically made available to develop ERASMUS + and COSME projects to tackle the skills gap, improve the image of the tourism sector or promote apprenticeship schemes and trainings all over Europe. A Council Recommendation on the "Establishment of a quality framework for Apprenticeships" is also being prepared. HOTREC's campaign therefore resulted in concrete EU actions which will help overcome the skills gap and help hospitality businesses grow further and create jobs.



HOTREC's campaign contributed to the development of concrete EU actions which will help overcome the skills gap and help hospitality businesses grow further and create jobs

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.

Policy breakfast in the European Parliament on the reduction of food waste

On 31 January 2017, HOTREC held an MEP breakfast in the European Parliament on the reduction of food waste in the hospitality sector. The event was hosted by MEP Biljana Borzan, rapporteur in the European Parliament on "Initiative on resource efficiency: reducing food waste, improving food safety", and is to be seen in the wider context of the U.N sustainable development goal of halving food waste by 2030 and of the 2017 U.N International Year of Sustainable Tourism for Development.

While recalling that the European hospitality industry is already a small food waster (e.g. the food service sector generates only 12% of the overall food waste in Europe¹, of which the hospitality industry represents only a share, as the food service sector also includes party catering and contract catering), HOTREC presented on that occasion the many activities developed by the hospitality industry to further reduce this low proportion of food waste.

In particular, HOTREC unveiled its new brochure "European Hospitality industry guidelines to reduce food waste and recommendations to manage food donations". The guidelines are made of 8 essential pillars in business management to help hospitality establishments reduce even further food waste through a set of concrete tips. Besides, the recommendations on food donations, jointly established with FEBA (the European Federation of Food Banks) shall guide both businesses and charity organisations willing to partner to help people in need.

During the event, some HOTREC Members as well as METRO also presented the best-practices activities they developed to help hospitality businesses. For instance, HORECA Vlaanderen presented its "no food to waste" campaign in Flanders which includes a detailed check-list to help chefs reducing their food waste, and to which 366 chefs already gave their support. DEHOGA also presented its own check-lists for German restaurants and catering businesses developed with the help of Unilever, while FEHR developed a similar guide for Spanish businesses. METRO also presented its own set of tools meant to facilitate the reduction of food waste in restaurant and catering businesses.

The event gathered many participants from DG Santé and DG Environment of the European Commission, from the European Parliament as well as stakeholders active in the food chain, who discussed and praised the initiatives and best-practices presented by HOTREC and its Members. This event therefore successfully demonstrated that the hospitality industry is a responsible actor which already does what is necessary to minimise the low proportion of food waste it produces.

¹ See EU Fusions report "Food waste data set for EU-28"

"I commend HOTREC and its Members for their efforts in reducing food waste and conserving resources"

Biljana Borzan, MEP, during the event of 31 January 2017



Mr. Emilio Gallego Zuazo (Secretary General of FEHR), Mr. Adrian Cummins (CEO of Restaurant Association of Ireland), Mr. Christian de Barrin (CEO of HOTREC), MEP Biljana Borzan, Mr. Danny van Assche (CEO of HORECA Vlaanderen), Ms. Maria Heider (Director for EU Affairs for METRO Group), Mr. Christian Reuter (Legal Advisor on food law, DEHOGA) and Mr. Patrick Alix (Secretary General of FEBA) on the margin of the MEP breakfast on food waste.

A Joint HOTREC-UEAPME event on how to make tourism SMEs a driver for job creation

In a joint event held on 30 November 2016 and aimed at fostering job creation and promoting competitiveness of SMEs across Europe, HOTREC and UEAPME brought together 50 high level stakeholders from the broader tourism sector. Co-hosted by MEP Othmar Karas, Chair of the European Parliament SME intergroup, and MEP Istvan Ujhelyi, Vice-Chair of the TRAN Committee, the event counted with the participation of high-level speakers such as MEP Antonio Tajani (Vice-President of the European Parliament at the time), MEP Cláudia Monteiro de Aguiar and MEP Claudia Tapardel (co-chair of the European Parliament Tourism Intergroup).

The hospitality sector remains one of the very few sectors which keeps creating tens of thousands of jobs every year

The event allowed to raise the participants' awareness about the economic importance of the tourism sector in Europe, as it provides 13 million jobs and is the 3rd socio-economic activity in Europe. The hospitality industry also employs 80% of the total EU tourism workforce (10 million direct jobs) and provides jobs to all types of workers (33% being relatively unskilled), therefore acting as a vehicle for social inclusion. Moreover, the hospitality industry created 2.5 million jobs between 2000 and 2010 and still keeps creating tens of thousands of jobs.

HOTREC and UEAPME presented 5 pillars to make hospitality businesses and SMEs more competitive

With the objective to create even more jobs, HOTREC and UEAPME unveiled 5 pillars of actions:

- Digitalisation: a level playing field for all tourism stakeholders including new providers using platforms needs to be deployed to tackle unfair competition and allow the 1,8 million small and medium-sized enterprises of the sector to further invest in sustainable tourism and modernise their infrastructures;
- Taxation - high tax wedge on labour constitutes a strong disincentive for companies to create more jobs. Lower taxes on labour should be developed;
- Seasonality is one of the biggest challenges. Public authorities and social partners should secure the possibility to use flexible working arrangements;
- Skills: the hospitality sector is facing a huge skills shortage, preventing to fill in vacancies. EU and national funding should be deployed to organise massive trainings, develop apprenticeship schemes, promote the European Hospitality Skills Passport and detect emerging skills;
- The image of the sector should be further promoted through the use of EU funding.

The event was a crucial opportunity to make the voice of hospitality businesses and SMEs heard and to show EU policy makers the way forward to boost even further jobs and growth in the tourism sector.

"We should take better advantage of the potential of job creation and growth inherent to the tourism sector"

MEP Othmar Karas, 30 November 2016, joint HOTREC-UEAPME event



MEP Istvan Ujhelyi, MEP Othmar Karas, President of the European Parliament Antonio Tajani, HOTREC President Susanne Kraus-Winkler, UEAPME's Secretary General Peter Faross and HOTREC CEO Christian de Barrin

Commissioner Vella and Minister Zammit attend HOTREC's Malta General Assembly

On the occasion of HOTREC's 73rd General Assembly in Malta, on 27-28 October 2016, HOTREC received European Commissioner Karmenu Vella, responsible for the portfolio of Environment, Maritime Affairs and Fisheries and Dr. Edward Zammit Lewis, Maltese Tourism Minister as guest speakers.

Commissioner Vella highlighted the economic importance of tourism in Europe, in particular coastal tourism, which together with cruise tourism, yachting and marinas, provides almost 3 million jobs and generates revenues of 400 billion euros in the EU. He announced a call for proposal making available €1.5 million to promote maritime sites across Europe. He encouraged businesses to embrace innovation to invest in upskilling; to develop vocational training alliances; to continue promoting Europe as a destination in third countries, namely in China, in order to make Europe an even more attractive destination.

Dr. Edward Zammit Lewis, presented the priorities of the upcoming Maltese Presidency. The organisation of a high-level conference on the completion of the Digital Single Market was one of the points announced. The Presidency will also stimulate discussions on visa facilitation and liberalisation agreements and is willing to envisage a solution on the Visa Code reform. Substantial progress will be done in the negotiations relating to the revision of the Waste Framework Directive (which incorporates measures on food waste reduction).

HOTREC fully welcomes the Commission and Council Presidency priorities in the field of tourism. Europe is the heart of worldwide tourism and should be put at the centre of European economic policy.

HOTREC discusses innovation within its 74th General Assembly in Estonia

As digitalisation is changing the nature of our daily life and of the hospitality industry, as well as being one of Estonia's driving force, HOTREC organised a specific session on innovation as part of its 74th General Assembly held in Tallinn on 27 April 2017. At the initiative of the President of the Estonian Hotel and Restaurant Association (EHRL), Mr. Verni Loodmaa, and in presence of the President of the Estonian Parliament, Mr. Eiki Nestor, dozens of delegates from the hospitality sector across Europe discussed how innovation is changing the hospitality sector as it is currently working.

In particular, the delegates were presented with the result of a new study from TCI research about designing the future of the hospitality experience, which was showing the need for even further innovation in hospitality in Europe to better meet consumer expectations. Besides, examples of new technological developments in the industry were also presented. The participants also discussed the success of the "e-Estonia programme, digital society and infrastructure" which gave Estonia a strong leadership in Europe on the digitalisation of the economy, a phenomenon which also affected the hospitality industry.



Dr. Edward Zammit Lewis, Maltese Tourism Minister, Mr. Tony Zahra, President of MHRA and European Commissioner Karmenu Vella during the Malta General Assembly.



Mr. Eiki Nestor, President of the Estonian Parliament, and Mr. Verni Loodmaa, President of the Estonian Hotel and Restaurant Association during the Tallinn General Assembly. Photographer : Erlend Štaub

BEST PRACTICES AND KNOWLEDGE SHARING ACTIVITIES

HOTREC serves as a hub for its Members to share their best practices in priority fields for the hospitality industry. As part of it in 2016, HOTREC provided its Members a forum where were presented best-practices on the "book direct" campaign in Ireland, on a new tool to help disabled children in Italy and on the Danish apprenticeship scheme. It also organised a workshop to improve association management and finances.

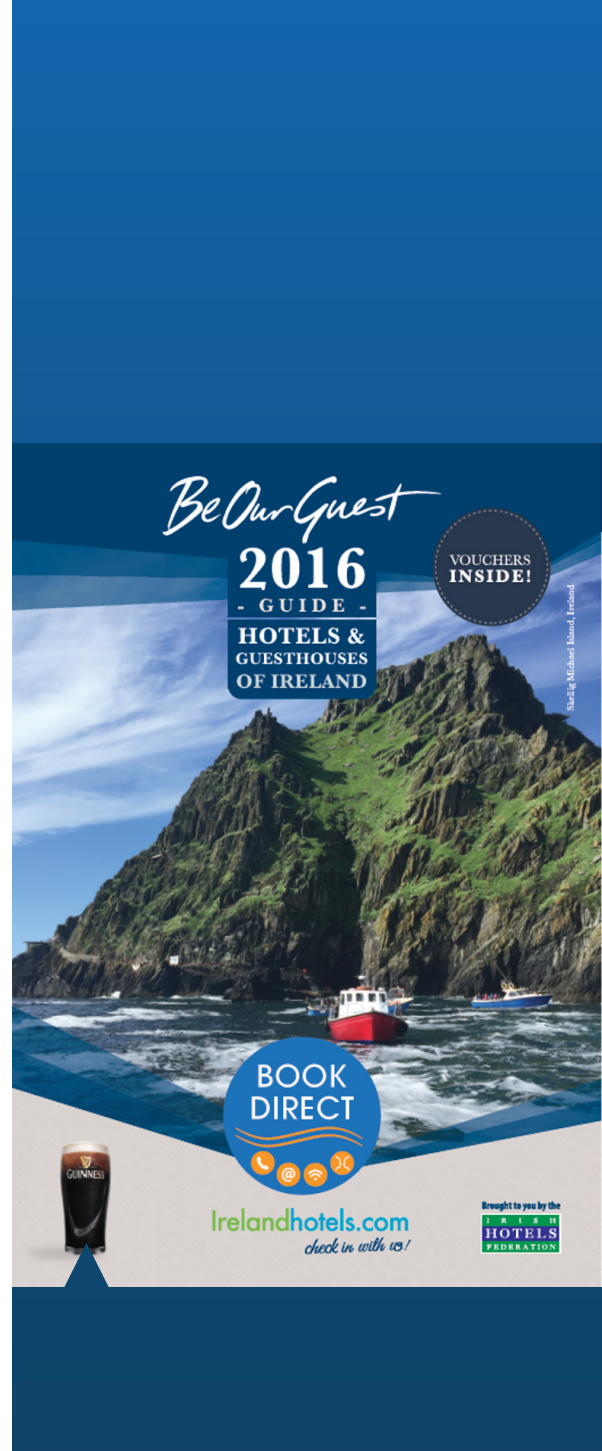
Direct hotel booking: an effective campaign conducted by the Irish Federation of Hotels

In December 2015, HOTREC launched its 'Book Direct' campaign. The campaign recognizes the different distribution and booking channels and emphasises the advantages of booking direct and having the direct contact with the service provider.

In 2016, among many other countries, Ireland took advantage of the campaign and made publicity for it via various channels. Inter alia, the 'Be Our Guest' guide, the premier Irish accommodation guide, of which 150.000 copies are published every year, featured the campaign prominently. The guide is promoted in 22 countries and throughout Ireland in tourist offices and key touristic locations. The campaign has sensitised Irish hoteliers to consider and adopt various strategies to increase direct bookings. There is no doubt about the importance of direct bookings for the Irish hoteliers, most of which having specific strategies to drive direct bookings. The majority of surveyed Irish hoteliers have made use of the 'Book Direct' campaign and its tools via different media and communication channels.

Supporting people with a disability to ease communication with the staff of restaurants: an inspiring initiative led by the Italian HOTREC Member FIPE

Around 15% of the world population experience some form of disability. In Italy it affects around 8 million people. Building on the difficulties experienced by children suffering from cognitive problems, a pilot was launched in Bergamo to find solutions to facilitate their ability to express themselves more easily in restaurants. It resulted in the creation of a visual placemat, which ease considerably the communication with restaurant staff. Since its launch, the placemat has been further developed and distributed by HOTREC's Member FIPE all over Italy. It is finding more and more use and acknowledgement in the different restaurants, bars, canteens and regional institutions all across Italy.





Denmark developed a new model of apprenticeship scheme for the hospitality sector

At the plenary session of the HORECA Sectorial Social Dialogue which gathered HOTREC, its trade union counter-part EFFAT and the European Commission on 9th December 2016, HOTREC's Danish member HORESTA presented the vocational education and training that is being deployed in Denmark.

From a total population of 5,7 million inhabitants, 93% of the population completes a youth education programme. The system is based on the dual education and training principle: students alternate between school-based and work-based learning in a company (apprenticeship). The VET programmes qualifies students for the labour market as skilled workers. The trainees are paid a wage by employers (1500€/per month on average) and the State reimburses 90% of the costs of the training. Employers also receive funding for trainees's travelling expenses during college periods. Within the scheme, the State and social partners share responsibilities on the development and provision of the programmes, legal framework and governance. Overall, the Danish VET model provides opportunities to move on to higher education and improves the quality of education and teaching. HOTREC shared this best practice with all its Members as it considers the example to be a source of inspiration for the entire HOTREC community.



Making trade associations better shaped for the future

On 28 April 2017, HOTREC organised a workshop for its Members on association management. The aim of this workshop was to allow Presidents, Chief Executives and Senior Executives of the various HOTREC Members across Europe to share their respective best-practices on association management and therefore improve the efficiency of their own organisations.

On that occasion, the participants were given the opportunity to learn more about the membership structure, staffing and budget of the various HOTREC Members. Moreover, Mr. Marek Harbulák, Secretary General of the Slovak Association of Hotels and Restaurants gave the participants a detail insight of his own experience of restructuring his own organisation and how he successfully achieved a meaningful budget consolidation. Furthermore, Mr. Adrian Cummins, CEO of Restaurant Association of Ireland presented his experience about how to expand the membership basis. The participants also had the opportunity to broaden their perspective with the insight of a European Trade Association, thanks to the presentation made by Mr. Pierre Olivier Bergeron, Secretary General of the Brewers of Europe.

HOTREC workshop on association management, Tallinn, 28 April 2017. Photographer : Erlend Štaub

2016 HOTEL RESULTS ACROSS EUROPE, BY MKG GROUP

Hoteliers who cry, hoteliers who laugh

| SEGMENT | Occupancy Rate | | ADR | | RevPAR | |
|---------------|----------------|--------------|-------------|------------|-------------|------------|
| | % | Change (pts) | € VAT excl. | Change (%) | € VAT excl. | Change (%) |
| 2* | 70,8% | 0,3 | 63,9 | 2,0% | 45,2 | 2,4% |
| 3* | 69,0% | 0,2 | 76,6 | 1,2% | 52,9 | 1,4% |
| 4* | 70,0% | -0,3 | 109,4 | 1,0% | 76,5 | 0,6% |
| 5* | 67,6% | -1,9 | 197,6 | -2,1% | 133,6 | -4,8% |
| GLOBAL | 69,6% | -0,1 | 94,0 | 0,4% | 65,4 | 0,3% |

Source: HotelCompset Database

In 2016, the disparities between hotel activity trends have been considerable from one European country to the next. While some mourned after terrorist attacks that hurt their results, others pursued their growth and even accelerated it, particularly countries on the Iberian Peninsula and in Central Europe. The global trend is balancing out on a European scale, with a RevPAR up slightly by +0.8%.

The occupancy rate of hotel chains reached 69.8% in 2016, a stable figure compared to 2015. According to data from the UNWTO, Europe posted 620 million international arrivals across the year, or a 2% increase corresponding to just half of standard growth in recent years. The context of insecurity that resulted from the terrorist attacks in Paris, Brussels and Nice contributed to exacerbating the wariness of certain international tourism clientele (particularly long haul travelers) with regard to the countries in question. Inversely, others pursued their development and posted growth in arrivals and even broke new records in terms of international arrivals, such as the United Kingdom and Spain. On the continent overall, the increase in arrivals -like growth in supply was moderate, leading to a stable occupancy rate.

Iberian Peninsula and Poland registered a double-digit RevPAR change

Average daily rates, meanwhile, were up slightly by +0.8%, to reach 93.7 euros excluding taxes. While the drop in prices in certain countries experiencing a difficult economic situation (France and Belgium, which were impacted by the security risk and slower economic growth), should not be ignored, inversely other countries posted significant increases, particularly in Southern and Eastern Europe. Italy is an exception due to comparison with a particularly eventful 2015 (World Expo Milan, Venice Biennale...), and the same may be said of Luxembourg (Presidency of the EU in 2015). Moreover, increases in prices have been made possible by occupancy rates that are strong once again.

European hoteliers positioned on the economy segment posted the strongest growth with a RevPAR up by +2.2%, primarily driven by average daily rate (+2.1%). On the other hand, the upscale hotel industry –which was, in 2015 as it had been for several years, the engine for Europe's hotel industry–posts inferior results, with a RevPAR down (-0.1%) due to an occupancy rate down by -0.3 points, slowing the average daily rate (+0.3%, to 132.3 euros). This degradation in the upscale is due to the drop in international long-haul arrivals: wariness with regard to certain key European destinations has caused travelers to head to other horizons.

Results at the end of 2016 and this beginning of 2017 suggest favorable perspectives for European hoteliers: France and Belgium appear to be on their way towards a progressive recovery, while other countries are following a growth dynamic.

2016 KEY FIGURES FOR RESTAURANTS AND BARS IN SELECTED EUROPEAN COUNTRIES

In 2016, restaurants experienced a strong raise in turnover in several European countries.

Austria: contrasted performances

As in the previous years, the sector experienced contrasted trends, with a decline in the number of inns (-6%), cafés (-2.34), café-restaurants (-1.73%) and bars/discotheques (-0.29%). However, the number of classical restaurants grew sharply by 5.85%.

Finland: mixed performances for the restaurant sector

The forecasts show contrasting trends for 2016, with a number of restaurants growing by around 1.4%, while employment in the sector decreased by 1.09%.

France: a sector hit hardly

2016 was a very negative year for the restaurant and bar sector in France, as restaurants turnover decreased by 4% overall (with a collapse of -7% in the 1st quarter 2016 alone) and cafés/bars' yearly turnover fell by 3.5%.

Germany: restaurants' turnover keeps rising

As in 2015, the German restaurant sector kept delivering a solid economic performance, with a growth of its annual turnover of 2.5%, while employment in the sector remained stable (+0.1%). The bar/café sector registered a more moderate increase of activity (+0.8% in turnover) while the number of employee decreased slightly (-0.2%).

Italy: restaurants on the rise

2016 was a positive year for the creation of restaurants, as their number grew by 2.6%. The number of cafés/bars remained however stable (+0.05%)

Spain: robust growth and record number of employees

The positive development experienced in the last few years continued in 2016, as the annual turnover rose for restaurants and bars by 6.2%. Moreover, the number of employees has reached new records in figures with a growth of 4.1%, reaching a total of more than 1.2 million workers.

The Netherlands: strong growth in annual turnover

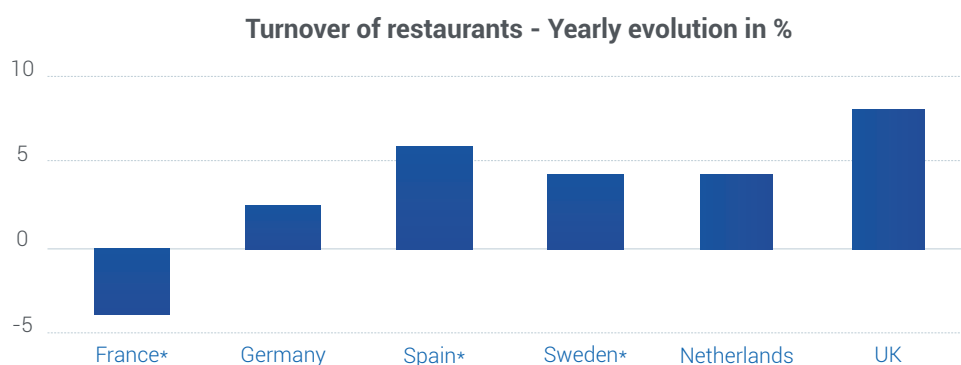
Forecasts for 2016 show a strong growth in turnover in all segments of the sector: +4.2% in the annual turnover of restaurants, +6% for fast service restaurants and +4.3% for cafés. This matches a similar growth in volume (+3% for restaurants, +5% for fast service restaurants, +2% for cafés) which should be accompanied by a similar growth in employment in the sector.

Sweden: +4.4% growth in the sector

The sector performed well with an overall growth in turnover of 4.4% which mirrors a growth in all segments of the market: +0.8% for hotel restaurants, +4.1% for cafés, +4.5% for fast-foods, +5.9% for lunch/dinner restaurants, +9.6% for Airports, train stations, highway restaurants and +4% for bars and pubs.

The United Kingdom: solid growth in the sector

Despite a decrease in the number of restaurants, bars/pubs (-2,5%), the restaurant sector grew 8.2% in 2016 and the pubs and bars sector by 4.9%. Employment in the sector now reached 1.6 million, representing 9% of the UK employment in 2016.



* Figures for Spain and Sweden aggregated data for both restaurants and cafés

MEET THE TEAM AND THE EXECUTIVE COMMITTEE



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HOTREC Executive Committee and CEO during the HOTREC General Assembly in Malta on 20 October 2016

ACCESS THE MEMBERSHIP

FULL MEMBERS

AUSTRIA

APHA-Fachverband Hotellerie

www.hotelverband.at

President: Siegfried Egger

CEO: Mag. Matthias Koch

APRA-Fachverband Gastronomie

www.gastronomieverband.at

President: Mario Pulker

CEO: Dr. Thomas Wolf

VVAT- Austrian Professional Copyright Users Association

www.vvat.at

President: Komm.Rat Fritz Kaufmann

CEO: Mag. iur. Andreas Hüttner

BELGIUM

Fed. Ho.Re.Ca. Bruxelles-Brussel

www.horecabruxelles.be

President: Yvan Roque

HORECA Vlaanderen

www.horecavlaanderen.be

President: Filip Vanheusden

CEO: Danny Van Assche

Fed. Ho.Re.Ca. Wallonie

<http://horecawallonie.be>

President: Thierry Neyens

Secretary General: Pierre Poriau

CROATIA

UPUHH-Association of Employers in Hospitality Industry

www.upuhh.hr

President: Kristian Šustar

CEO: mr.sc. Iva Bahunek

THE CZECH REPUBLIC

AHRCR-The Czech Association of Hotels and Restaurants

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

President: Jens Zimmer Christensen

CEO: Katia K. Østergaard

ESTONIA

EHRA-Estonian Hotel and Restaurant Association

www.ehrl.ee

President: Verni Loodmaa

General Manager: Maarika Liivamägi

FINLAND

FHA-Finnish Hospitality Association

www.mara.fi

President: Harri Ojanperä

CEO: Timo Lappi

FRANCE

GNC-Groupement National des Chaînes

www.umih.fr

Président: Jacques Barré

Administrator: Samuel Lacombe

GNI – Groupement national des Indépendants

www.synhorcat.com

President: Didier Chenet

Director General of GNI-Synhorcat: Franck Trouet

UMIH-Union des Métiers et des Industries de l'Hôtellerie

www.umih.fr

President: Roland Heguy

Director General: Philippe Delterme

GERMANY

DEHOGA-Deutscher Hotel-und Gaststättenverband

www.dehoga.de

President: Guido Zöllick

CEO: Ingrid Hartges

IHA-Hotelverband Deutschland

www.hotellerie.de

President: Otto Lindner

CEO: Markus Luthe

GREECE

HCH-Hellenic Chamber of Hotels

www.grhotels.gr

President: George Alex. Tsakiris

CEO: Dr. Agni Christidou

HUNGARY

HHRA-Hungarian Hotel and Restaurant Association

www.hah.hu

President: László Könnnyid

Secretary General: István Kovács

IRELAND

IHF-Irish Hotels Federation

www.ihf.ie

President: Joe Dolan

Chief Executive: Tim Fenn

RAI-Restaurants Association of Ireland

www.rai.ie

President: Liam Edwards

Chief Executive: Adrian Cummins

ITALY

FEDERALBERGHI-Federazione delle Associazioni Italiane Alberghi e Turismo

www.federalberghi.it

President: Cavaliere del Lavoro Bernabò Bocca

Director General: Doctor Alessandro Massimo Nucara

FIPE-Federazione Italiana Pubblici Esercizi

www.fipe.it

President: Dott. Lino Enrico Stoppani

Director General: Doctor Marcello Fiore

LATVIA

AHRL-Association of Latvian Hotels and Restaurants

www.hotels-restaurants.lv

President: Janis Pinnis

CEO: Mag. Santa Graikste

LITHUANIA

LHRA-Lithuanian Hotel and Restaurant Association

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

President: Alain Rix

Secretary General: François Koepp

MALTA

MHRA-Malta Hotels and Restaurants Association

www.mhra.org.mt

President: Tony Zahra

CEO: Andrew Agius Muscat

THE NETHERLANDS

KHN-Dutch Hotel, Restaurant and Café Association

www.khn.nl

President elect : Rober Willemsen

CEO : Rob Bongenaar

POLAND

IGHP- Chamber of Commerce of the Polish Hotel Industry

www.ighp.pl

President: Ireneusz Węglowski

Secretary General: Marcin Mączyński

SLOVAKIA

ZHRSR- The Slovak Association of Hotels and Restaurants

www.zhrsr.sk

President: Patrik Bočkan

Secretary General: Marek Harbulák

SLOVENIA

TGZ – Tourism and Hospitality Chamber of Slovenia

www.tgzs.si

President: Mr. Andrej Prebil

Director: Ms. Klavdija Štalcer

President of Slovenian Hotel Managers Association:

Mr. Gregor Jamnik

SPAIN

CEHAT-Confederación Española de Hoteles y Alojamientos Turísticos

www.cehat.com

President : Juan Molas

Secretary General: Ramón Estalella

FEHR-Federación Española de Hostelería

www.fehr.es

President: José M^a Rubio Marín

Secretary General: Emilio Gallego Zuazo

SWEDEN

VISITA-Swedish Hospitality Industry

www.visita.se

President: Maud Olofsson

CEO: Eva Östling

ASSOCIATE MEMBERS

ICELAND

SAF - Icelandic Travel Industry Association

<http://www.saf.is/en/>

President: Grímur Sæmundsen

CEO: Helga Árnadóttir

LICHTENSTEIN

LHGV - Liechtensteiner Hotel & Gastronomieverband

<http://www.lhgv.li/>

President: Valentin Kirchhofer

CEO: Dr. Marcello Scarnato

NORWAY

NHO Reiseliv-Norwegian Hospitality Association

www.nhoreiseliv.no

President: Ole Warberg

CEO: Kristin Krohn Devold

OBSERVERS

SWITZERLAND

GASTROSUISSE - Verband für Hotellerie und Restauration

www.gastrosuisse.ch

President: Casimir Platzer

CEO: Daniel Borner

HOTELLERIESUISSE - Swiss Hotel Association

www.hotelleriesuisse.ch

President: Andreas Züllig

CEO: Dr. Claude Meier

TURKEY

TUROB- Hotel Association of Turkey

www.turob.com

President: Timur Bayindir

General Manager: İsmail Taşdemir

TÜROFED-Turkish Hoteliers Federation

www.turofed.org.tr

President : Osman Ayık

General Manager: Savaş Çolakoğlu

THE UNITED KINGDOM

The ALMR- The Association of Licensed Multiple Retailers

www.almr.org.uk

Chairman: Steve Richards

CEO: Kate Nicholls

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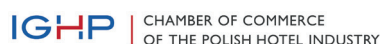
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