

Slightly higher occupancy, determined by the accommodation rates decline, which continued in the first half of 2010, few new hospitality units on the market, customers even more demanding than last year and international hotel chains bypassing Romania due to economic and political instability, this is how hospitality market looks in 2010, after almost two years of crisis. The weak leisure tourism development, doubled by poor infrastructure and lack of city attractions, has turned Bucharest into a more vulnerable victim of the financial crisis than other Eastern and Central European capitals, such as Prague, Warsaw or Budapest, where the occupancy is significantly higher at weekends.

To attract more customers this year, hoteliers invested in new restaurants and conference facilities and in the refurbishment of the rooms and the first timid results are starting to show in the occupancy increase and in the revenues growth.

General managers of some of the most important 3, 4 and 5 star hotels in Bucharest, interviewed by [Bucharest Herald](#), have noticed the positive evolution of the hotels they are managing, in the first half of 2010, but do not expect dramatic changes on the market in 2011, due to the harsh economy environment. Other specialists expect many small hotels, which can no longer cover their maintenance costs and pay their debts to the banks, to close next year and cause a 10% decline of the overall accommodation capacity.

Lower rack rates, higher occupancy

Between 2001 and 2008, Bucharest registered a constant foreign visitor growth of 10% per year. The overnight accommodation also went up by 11% every year. The economic downturn reduced the number of foreign visitors by 3% and the number of overnight accommodation by 15% in 2009, according to real estate consultants Jones Lang LaSalle (JLL). The accelerated expansion of the hospitality market, between 2006 and 2008 also pushed down the occupancy rates gradually, from 72% in 2007 to 53% in 2008. But in the first half of 2010 the occupancy went up 7.4%, on 2009, boosted by the price cuts, which continued in 2010, after an average 27% decline in 2009, on 2008, according to real estate consultants CBRE Eurisko.

“The occupancy rate increase in the 4 and 5 star hotels was determined by the demand shift from the inferior comfort segments, such as the 3 star hotels, triggered also by the price decline. The accommodation rates are and will keep being under pressure considering that travel budgets have declined and the offer is high on all the market segments. Unfortunately the consumption pattern will be difficult to change and we cannot expect spectacular changes on short term.” says Sonia Nastase, general manager of the five star hotel Howard Johnson (www.hojoplaza.ro) located on Calea Dorobantilor, part of Windham chain.

According to Catalin Stefan, the general manager of the four star hotel Capital Plaza (www.capitalplaza.ro)

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), which opened in 2009 on Blvd Iancu de Hunedoara, the occupancy rate increase in 2010 was boosted by both prices and the existence of the necessary accommodation infrastructure, which was poorly developed in the previous years.

“The prices dropped against the previous years and are similar or even lower than last year’s prices. The rack rates were very high in the previous years because Bucharest did not have the necessary accommodation infrastructure. Now we already have 12,000 rooms against 8,500 rooms in 2006 or in 2007.” says Catalin Stefan.

The general manager of Capital Plaza thinks the slow economic development will imprint stagnation to the Bucharest hospitality market in the first half of 2011 also and the significant changes will start showing in the second half of next year.

“I think both the private and the state sector will be strongly affected by the crisis this winter. In the past two years the average occupancy rate in Bucharest hotels stood between 50 and 60%.” argues Catalin Stefan.

Trying to cut expenses as much as possible, but also benefit from a certain degree of comfort, many business and leisure tourists gave up on the luxury design and facilities of the glamorous five star hotels and started looking at smaller 3 and 4 star hotels with all the pragmatic facilities.

“I have noticed that customers have become more demanding and are looking for smaller, customer oriented hotels, which can offer all the necessary facilities, such as conference rooms, spa, gym facilities.” says Cristina Solomon, the general manager of three star Tempo Hotel (www.tempohotel.com). The hotel is located on Str. Armand Calinescu and has 32 rooms.

“I think 2011 will be more difficult than 2010 for the hospitality market, because we have not reached the bottom yet, to be able to talk about growth. At the same time 2011 will be an electoral year and maybe, in an attempt to gain votes, the government will try to rebalance the economy. What we have learnt from this experience is that it is useless to draw up budgets or make forecasts, because everything is in a permanent changing process.” adds Cristina Solomon.

The newly appointed general manager of five star hotel Athenee Palace Hilton (www.hiltonbucharest.com), Linda Griffin sees a rather conservative than spectacular growth of the hospitality market next year, dictated by the current difficult economic situation.

“I think 2011 will be similar to 2010 for the hospitality market given the current economic situation in Romania. Other markets have grown and developed, compared to Romania. Germany is in a solid position, the London market is doing very well, but with the current economic situation in Romania I think there will be conservative growth. We have seen some volume growth happening early in the year, compared to 2009, but not to the same level as in other places.” says the general manager of Athenee Palace Hilton.

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Linda Griffin has been the new general manager of Athenee Place Hilton hotel since 1st September 2010 and has a 21-year experience within Hilton Worldwide. Before being appointed at the head of Athenee Place Hilton, she was the general manager of Adana Hilton and Mersin Hilton in Turkey.

Spanish hotel chain NH Hoteles, present in Romania with two four star hotels, in Bucharest and in Timisoara, saw increasing occupancy rates in all its hotels worldwide, including in Romania. The revenue per room (RevPAR) indicator, also had a positive dynamics on 2009, according to the general manager of NH Hoteles Bucharest (www.nh-hotels.com) and Timisoara, Elena Dumitrescu.

“We consider that after the sector’s negative evolution in 2009, a positive advance appeared in the first half of 2010, and this dynamics was confirmed for NH Hotels both in Romania and at worldwide level. Therefore, we find the hotel market generally improving its key performance indicators, with a reduction in the fall of the average prices and an increase in occupancy. Our RevPar has a positive dynamics against the previous year, and we conservatively expect 2011 to continue to pay off in terms of both industry’s recovery and improvements in our performance.” says Elena Dumitrescu.

NH Hoteles Bucharest located on Blvd Mircea Voda has a restaurant and three conference rooms.

Elena Dumitrescu says the key words of the hospitality market right now are “optimization” and “competition”. “We all had to optimize due to the business slowdown and the competition increased in all market segments, supported either by the opening of new hotels or by the expansion of existing ones.” explains Elena Dumitrescu.

Unnecessary panic

Seriously affected by the occupancy decline and worried that fewer and fewer customers will chose their hotels, most hoteliers started cutting the prices and in 2010 the rack rates reached dramatically low levels. This has happened especially in the case of 4 and 5 star hotels which now have rates similar or slightly higher than the three star hotels. On short term this strategy has managed to boost the occupancy, but on long term this will result in a very difficult challenge for hoteliers to increase the accommodation prices, when the crisis is over.

The general manager of the four star hotels Ramada Plaza (www.ramadaplazabucharest.ro) and Ramada Parc (www.ramadabucharestparc.ro) in Bucharest, part of Windham chain, Daniel Ben- Yehuda says in some hotels the average rate per room dropped more than 25%.

“This shows us that the hotels in Bucharest started a heavy price war! The first word that comes to my mind in relation to the hospitality market is unnecessary panic. I think the price war has made more damage than benefit and in the long run we will deal with the difficult task of increasing rates, which in the current atmosphere is almost impossible. I remember that

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between 2006 and 2008 we were all criticizing Hungary for the very low rates and now our accommodation rates are even lower! It is true that the supply is bigger than the demand, but even so, there is no reason for 4 and 5 star hotels to have such low average rates.” says Daniel Ben- Yehuda.

Although the hospitality markets in western and central Europe are showing signs of growth in the second half of 2010, Romania will have a longer way to go to recovery, according to the general manager of the five star hotel JW Marriott (www.marriott.com), Igael Porecki. The general manager of Marriott also says that, in an attempt to find the lowest price offers, many customers are giving up on their loyalty for a specific hotel brand and chose cheaper hotels.

“2010 was more difficult than 2009 for the hospitality market, due to continuous travel budget cuts, imposed by the companies and the declining demand on our market. Although we have signs that the markets in Western and Central Europe are slightly recovering in the second half of 2010, it will take time until the wave of recovery will reach Romania. As the demand is much lower than the actual supply, every hotel is fighting for its share, while customers’ loyalty for a specific brand, has dropped.” Igael Porecki says.

Despite the cautious optimism expressed by most hoteliers there are also specialists that see a steeper decline on the hospitality market next year. The general manager of tourism consultancy firm Trend Hospitality says many hotels could close in 2011 and the accommodation capacity in Romania could drop by over 10 per cent. “The situation of the hospitality market is more difficult in 2010 than in 2009, because the hoteliers no longer have financial resources to support the losses they registered in the past year and a half.” Tinu Sebesanu told Mediafax.

Leisure tourism failure

In the past two years Bucharest hospitality market has been one of the most affected markets in the region. While other capital such as Prague and Budapest, famous for their architecture and historic sites could offset their losses on the business segment with high occupancy on the leisure segment, especially at weekends, Bucharest hotels have had to fight the cruel reality of the reduced business trip budgets.

“I think Prague, Budapest and other eastern European hospitality markets have faced the same level of crisis as Bucharest. The only difference is that these capitals can fall back on tourism to fill their hotels, while leisure tourism is virtually nonexistent in Bucharest.” says Daniel Ben- Yehuda.

“The leisure tourism attractiveness of a capital depends on several factors, among which available infrastructure, which can facilitate access to other objectives near the city, the thematic packages including music and cultural attractions and last but not least the fame of the destination. The accommodation prices in Bucharest are competitive with those on other markets in the region. What makes the difference between Bucharest and Prague or Budapest is the tourism notoriety, the fame, not the accommodation rates.” explains Sonia Nastase.

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Linda Griffin noticed a resemblance between the evolution of the Bucharest and Budapest, two of markets in the region, most affected by the financial crisis.

“I am not in a very good position to discuss other Eastern European markets as I am new to the area, however I believe Budapest is still going through a difficult time, just as Bucharest. It is my understanding that Vienna is starting to see positive light.” says Linda Griffin.

According to Elena Dumitrescu the RevPAR indicator declined in 2009 on 2008 by almost 5% on all the eastern European markets, except for Russia, while in Romania the CBRE figures show the RevPAR decline was much higher, around 38%.

“I think with all the pipeline of delivered hotel facilities, mostly internationally branded, together with attractive room rates, diversified and targeted offers to all client segments, Bucharest hotel market has at least successfully maintained, if not improved, its long-term competitiveness in the region.” argues Elena Dumitrescu.

Staff mobility kept under control

Flexibility, creative solutions, outsourcing, strict cost management, focus on the events segment are some of the main ingredients of the strategies which, along with the price cuts have helped hoteliers survive and even report growth in the past two years.

Capital Plaza, which opened in October 2010 managed in only one year to reach an occupancy rate similar to the other four star hotels on the market and this was also due to the high number of social events organized by the hotel, which attracted many customers. “Our occupancy rate was only 5% to 6% lower than the average occupancy of other four star hotels present for several years on the Bucharest market. Last year and this year we managed to gain loyal customers organizing weddings, baptizes and private parties.” says Catalin Stefan.

Capital Plaza has 95 rooms, a Mediterranean restaurant, a coffee shop and five conference rooms with a total capacity of 250 seats.

The crisis has also tempered the staff mobility which was very high on the hospitality market. Now employees are struggling to keep their jobs and most of them became more customer oriented and this has lead to an improvement of the services, according to Cristina Solomon.

“The staff stability has helped the hotel survive during the crisis. The employees became more careful and nicer with all the clients because I explained to them, and it seems that they understood, that the clients are the ones that pay our wages. It is much easier for a manager to focus on a strategy to overcome the crisis when he or she does not have to worry that he or she will have to train new people all the time and make them understand the hotel policy.” says Cristina Solomon.

The occupancy rate of Tempo Hotel dropped to 51% in 2010, against 53% in 2009 and the accommodation rates declined by 34% in 2010. But the hotel managed to stay on profit, although this dropped by 47.11%.

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Linda Griffin thinks a major issue of the Romanian hospitality market is the low number of professionals, as the training opportunities in dedicated schools are quite limited at the moment.

“I understand that there are not many major hospitality schools in Romania and hospitality professionals need proper education in this area. People that choose to work in the hospitality market should have the opportunity to study the profession, opening up opportunities that may seem out of reach initially.” says Linda Griffin.

In 2009 and in 2010 both Ramada Plaza and JW Marriott outsourced many activities and renegotiated the contracts with service providers and suppliers, to cut unnecessary costs.

In 2010 Ramada Plaza had a 5% occupancy decline on 2009 and the accommodation rates dropped by 15% to 20%. The hotel’s turnover also fell by 5% to 10%, according to Daniel Ben-Yehuda.

“The customer numbers have increased in the first half of 2010, against the first half of 2009, while revenues have dropped a bit, because of the reduced average rates.” explains Igael Porecki.

New look, new customers

To keep the customers interested and boost the occupancy with the help of a new look, most hotels have undergone refurbishments works. Some changed the design and the furniture, others made important investments in the rebranding and renovation of the restaurants or coffee shops.

Athenee Palace Hilton finished the refurbishment works which included the opening of the new Cafe Athenee restaurant at the ground floor, which replaces the former Le Bistro restaurant, the renovation of the hotel lobby and of Le Collonnade. The overall investments totaled 2 million Euro. Roberto’s Restaurant will also undergo a facelift which will begin in 2011. The “Brasserie” restaurant will be turned into a retail space, which will be rented to one tenant.

„So far the new restaurant has been really well received by our customers, they are positive about both the look and feel of the Café Athenee as well as about the menu and restaurant concept.” says Linda Griffin.

Howard Johnson has refurnished the lobby and the Bar & Lounge CENTRO. The underground parking and the conference center have also been modernized, according to Sonia Nastase.

„The investments we have done each year are paying off with improvements in productivity and customer satisfaction. Also, as the Group has a strategic focus upon our impact on the environment, we have followed objectives such as reductions in energy and water consumption, CO2 emissions and waste generation with 20% until 2012. “says Elena Dumitrescu.

„We have two major investment left in order to complete the Ramada Plaza convention center project, the largest Conference center in Bucharest (2500 sq/meter) which is postponed for

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now, and our pool and spa which we hope to finish during 2011.” explains Daniel Ben- Yehuda.

JW Marriott went through a more complex renovation process which will also continue in 2011. The Grand Ballroom and the Viennese coffee shop at the first floor, Vienna Lounge, were completely refurbished and the menu was improved, according to Igael Porecki. The investments reached 1.2 million Euro.

Right now the hotel is renovating the Cupola Restaurant and re-branding it into JW Steakhouse, which will also include a cigar lounge and a dedicated bourbon bar.

The renovation process will continue in January and February 2011 with Constanta ballroom and the rest of the conference rooms.

Expansion ambitions

In 2010 Bucharest hospitality market reached a capacity of 9,000 rooms in 3, 4 and 5 star hotels, according to real estate consultants Jones Lang LaSalle. Between 2006 and 2008, 3,000 new rooms were delivered on the market, the opening of four star Rin Grand Hotel and five star Radisson Blu accounting for 1,200 of these rooms. In 2009, four star hotel Capital Plaza (100 rooms), four star aparthotel Starlight Suiten (78 suites), four star Phoenicia Express (180 rooms), four star Phoenicia Aparthotel (55 suites) and the five star boutique hotel Grand Hotel Continental (59 rooms) added another 529 rooms to Bucharest hospitality market, according to real estate consultants CBRE Eurisko.

Despite the economic downturn another 567 hotel rooms are due for the market by 2012, according to JLL. US hotel chain Hilton Worldwide has announced the opening on its first four star Doubletree hotel in Bucharest in 2011 and the second hotel in Bucharest, after the opening of the five star Athenee Palace Hilton, on Calea Victoriei, in 1996. The hotel will be a franchise, will include 88 rooms and will be a conversion of Bucharest City hotel in Piata Unirii. Another Doubletree by Hilton will open at the beginning of next year in Oradea (Bihor county). Hilton will also open in 2011 its first economy hotel, under branded Hampton, in Brasov.

By the end of 2012 US hotel chain JW Marriott present with a five star hotel in Bucharest will open a four star Courtyard hotel in the capital. The hotel will be located in Piata Unirii and will have 198 rooms. Romanian developer Marvel Group, the owner of Monte Carlo Palace aparthotel built near Piata Presei, will open a five star plus hotel on Calea Victoriei, near Radisson Blu. Galerie Vendome hotel will have 120 rooms and will open in 2012, according to the general director of Monte Carlo Palace, Edward Popescu.

Some other international hotel chains, which are not yet present in the country have expressed their intention to enter Romania in the next years, but their plans are on hold for the moment, due to the economic, fiscal, legislative and political instability. Spanish hotel chain Sol Melia last summer announced its plans to open four and five star hotels, under Tryp and Melia Hotels & Resorts in Romania. The first hotel will open on the Black Sea coast, but the hotel operator did not mention any definite opening date. Whyndham Hotels will also open next year its first three star hotel in Romania, under the Days Inn brand. The hotel will open near Sibiu and the chain is

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also looking for expansion opportunities in Bucharest, Brasov and Cluj. Sheraton Hotels, part of US Starwood Hotels and Resorts is also negotiating the opening of its first hotel in Romania, in Cluj. Another brand owned by Starwood, Le Meridien announced the opening of a five star hotel on Calea Victoriei, but the plans were eventually canceled.

“At this moment Bucharest and Romania are high on the waiting list of all the major hotel chains. They are aware that this country is a major gateway between east and west and the importance of having Romania in their portfolio, but they are also aware of all the difficulties the hotel industry is going through, so I think we will not see them entering this market or increasing their presence until there will be change in the negative trend.” argue Daniel Ben- Yehuda.

The general managers of Capital Plaza and JW Marriott argue that Bucharest hospitality market has already reached saturation in terms of four and five star rooms.

“On the leisure segment I think there are enough hotel rooms, because Bucharest is not a tourism destination, such as other capitals, where the traffic is very high at weekend. Overall the hotel market has reached saturation and cannot absorb many new rooms.” argues Catalin Stefan.

On the other hand Linda Griffin, sees a balance between the rapid, but not so healthy expansion of the hospitality market and the high volume of hotel rooms, which has turned Bucharest into an attractive destination for congress business.

“The hospitality market in Romania is evolving. It is a growing market and it still has some room to develop and attract more business and leisure travelers. In terms of business the market is soft, it has gone through a rapid expansion in the last few years, also under the pressure of the economic crisis, a combination which has not been so positive for the hotels. On the other hand this was good for the consumer, because it resulted in significant price decreases. At the same time, the volume of hotel rooms also gives Bucharest the opportunity to draw in big pieces of congress business. There is enough quality accommodation, in Bucharest that it should start trying to attract some bigger conferences, which, so far I understand has not really happened as there is no single organization behind this type of initiative. Congresses should be possible as the People's House has a grand ballroom which can be used for big events or exhibitions.” explains the general manager of Athenee Palace Hilton

Hotelierii avertizeaza: Tarifele reduse pot scufunda piata pe termen lung

Un grad de ocupare usor crescut, determinat de scaderea tarifulor de cazare, care a continuat in prima jumatate a lui 2010, putine hoteluri noi pe piata, clienti cu pretentii si

mai mari decat anul trecut si lanturi hoteliere internationale care ocolesc Romania din cauza instabilitatii economice si politice, asa arata piata hoteliera in 2010, dupa doi ani de criza. Dezvoltarea slaba a turismului de leisure, dublata de infrastructura deficitara si lipsa de obiective turistice, a transformat Bucurestiul intr-o victima mai vulnerabila a crizei, decat alte capitala din Estul si Centrul Europei, precum Praga, Varsovia sau Budapesta, unde gradul de ocupare este mai mare in weekend. Pentru a atrage mai multi clienti, anul acesta hotelierii au investit in restaurante si facilitati de conferinte noi, dar si in renovarea camerelor, iar primele rezultate timide incep sa se vada in cresterea gradului de ocupare si a veniturilor.

Directorii generali ai unora dintre cele mai importante hoteluri de 3, 4 si 5 stele din Bucuresti, intervievati de Bucharest Herald, au observat o evolutie pozitiva a hotelurilor pe care le conduc, in 2010, comparativ cu 2009, dar nu se asteapta la schimbari spectaculoase in 2011, din cauza mediului economic dificil. Alti specialisti se asteapta ca multe hoteluri mici, care nu isi mai pot acoperi costurile de intretinere si nu isi mai pot plati datoriile catre banci, sa se inchida in 2010 si sa provoace o scadere generala de 10% a capacitatii de cazare.

Tarife mai mici, clienti mai multi

Intre 2001 si 2008, Bucurestiul a inregistrat o crestere constanta anuala a numarului de vizitatori straini, de 10%. Si innoptarile au crescut cu 11% in fiecare an. Criza financiara a redus numarul de vizitatori straini cu 3% si numarul de innoptari cu 15% in 2009, potrivit consultantilor imobiliari Jones Lang LaSalle (JLL). Expansiunea accelerata a pietei hoteliere intre 2006 si 2008, a impins in jos gradul de ocupare, treptat, de la 72% in 2007, la 53% in 2008. Dar in prima jumatate a lui 2010, gradul de ocupare a crescut cu 7,4%, fata de 2009, stimulat de reducerea tarifelor, care a continuat in 2010, dupa o scadere medie de 27% in 2009, fata de 2008, potrivit consultantilor imobiliari CBRE Eurisko.

“Cresterea gradului de ocupare vine pe fondul polarizarii in zona de 4 si 5 stele a unor cereri de pe segmente inferioare de confort, respectiv 3 stele, acesta in conditiile in care tarifele sunt comparabile. Tarifele sunt si vor continua sa fie sub presiune in conditiile in care bugetele de calatorie au scazut si exista o oferta bogata pe toate segmentele de piata. Din pacate, tiparul de consum va fi greu de schimbat si nu putem astepta modificari spectaculoase pe termen scurt.” a declarat Sonia Nastase, directorul general al hotelului de cinci stele Howard Johnson (www.hojoplaza.ro), care apartine lantului american Windham. Howard Johnson este localizat in Bucuresti, pe Calea Dorobanti.

Potrivit lui Catalin Stefan, directorul general al hotelului de patru stele Capital Plaza (www.capitalplaza.ro), care s-a deschis in 2009, pe Blvd Iancu de Hunedoara, cresterea gradului de ocupare a fost stimulata in 2010 atat de preturi cat si de existenta infrastructurii de cazare necesare, care in anii precedenti era slab dezvoltata.

“Tarifele au scazut fata de anii precedenti si sunt similare sau chiar mai mici decat tarifele de anul trecut. Tarifele erau foarte mari in anii precedenti pentru ca Bucurestiul nici nu beneficia de

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infrastructura necesara de cazare. Acum avem deja 12.000 de camere, fata de 8.500 in 2006 sau 2007.” spune Catalin Stefan.

Directorul general al hotelului Capital Plaza crede ca dezvoltarea economica dificila va imprima stragnare pe piata hoteliera din Bucuresti si in prima jumatate a lui 2011, iar schimbarile semnificative vor incepe sa fie vizibile in a doua jumatate a anului.

“Cred ca atat sectorul privat, cat si sectorul de stat vor fi afectate puternic de criza in aceasta iarna. In ultimii 2 ani gradul de ocupare in hotelurile din Bucuresti a fost intre 50 si 60%.” spune Catalin Stefan.

Incerand sa isi reduca pe cat posibil cheltuielile, dar sa beneficieze in acelasi timp de un anumit grad de confort, multi turisti de business si de leisure au renuntat la facilitatile si designul de lux al hotelurilor de cinci stele si si-au indreptat atentia catre hoteluri mai mici, de 3 si 4 stele, cu toate facilitatile necesare.

“Din cate am observat clientii au devenit mai pretentiosi. Au inceput sa caute hotelurile mici, “customer orientated” dar care le pot oferi toate facilitatile, precum sali de conferinta, restaurant, spa, sala gimnastica”. spune Cristina Solomon, directorul general al hotelului de trei stele Tempo (www.tempohotel.com). Hotelul este localizat pe Str. Armand Calinescu si are 32 de camere.

“Cred ca 2011 va fi si mai dificil pentru ca nu am atins pragul cel mai de jos, pentru a putea vorbi despre crestere. In acelasi timp 2011 va fi un an electoral si poate din dorinta de a castiga voturi guvernul va incerca sa redreseze economia. Ce am invatat din experienta asta e ca degeaba mai facem bugete sau previziuni ca totul e in continua schimbare.” adauga Cristina Solomon.

Noul director general al hotelului de cinci stele Athenee Palace Hilton (www.hiltonbucharest.com), Linda Griffin vede o crestere mai degraba conservatoare, decat spectaculoasa, a pietei hoteliere, anul viitor, dictata de actuala situatie economica dificila.

“Cred ca 2011 va fi similar cu 2010 pentru piata hoteliera, avand in vedere situatia economica din Romania. Alte piete au crescut si s-au dezvoltat, comparativ cu Romania. Germania se afla intr-o situatie solida, piata londoneza functioneaza foarte bine, dar avand in vedere situatia economica din Romania, cred ca vom avea o crestere conservatoare. Am vazut o crestere a volumului la inceputul anului, comparativ cu 2009, dar nu la acelasi nivel ca in alte locuri.” spune directorul general al Athenee Palace Hilton.

Linda Griffin este noul director general al Athenee Place Hilton de la 1 septembrie 2010 si are o experienta de 21 de ani in cadrul lantului hotelier Hilton Worldwide. Inainte de a fi numita la conducerea hotelului Athenee Place Hilton, a fost directorul general al hotelurilor Adana Hilton si Mersin Hilton din Turcia.

Lantul hotelier spaniol NH Hoteles, prezent in Romania cu doua hoteluri de patru stele,

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deschise in Bucuresti si in Timisoara a observat o crestere a gradului de ocupare in toate hotelurile pe care le detine in lume, iar indicatorul RevPAR, care exprima venitul pe camera, a avut de asemenea o dinamica pozitiva in 2009, potrivit directorului general al NH Hoteles Bucuresti (www.nh-hotels.com) si Timisoara, Elena Dumitrescu.

“Consideram ca dupa evolutia negativa a sectorului in 2009, in prima jumatate a lui 2010 a aparut un avans, iar aceasta dinamica a fost confirmata atat pentru hotelurile NH Hotels din Romania, cat si pentru restul hotelurilor din lume. Prin urmare consideram ca piata hoteliera si-a imbunatatit in general indicatorii de performanta, cu o reducerea mai lenta a preturilor si o crestere a gradului de ocupare. In cazul nostru indicatorul RevPar are o dinamica pozitiva comparativ cu anii anteriori si ne asteptam ca 2011 sa aiba rezultate pozitive atat in ceea ce priveste recuperarea industriei hoteliere cat si imbunatatirea performantelor noastre.” spune Elena Dumitrescu.

Elena Dumitrescu spune ca in acest moment cuvintele cheie care descriu piata hoteliera sunt “optimizare” si “competitie”. “Cu totii a trebuit sa ne optimizam activitatea din cauza declinului afacerilor, iar competitia a crescut pe toate segmentele de piata, sprijinita fie de deschiderea de noi hoteluri sau prin extinderea hotelurilor existente.” explica Elena Dumitrescu.

Panica inutila

Serios afectati de scaderea gradului de ocupare si ingrijorati ca din ce in ce mai putini turisti vor trece pragul hotelurile lor, majoritatea hotelierilor au inceput sa reduca preturile, iar in 2010 tarifele de cazare au atins valori foarte joase. Acest lucru s-a intamplat in special in cazul hotelurilor de patru si cinci stele, care acum au tarife similare sau usor mai mari decat hotelurile de trei stele. Pe termen scurt aceasta strategie a reusit sa ridice gradul de ocupare, dar pe termen lung hotelierii se vor confrunta cu provocarea dificila de a creste din nou preturile.

Directorul general al hotelurilor de patru stele Ramada Plaza (www.ramadaplazabucharest.ro) si Ramada Parc (www.ramadabucharestparc.ro) din Bucuresti, care fac parte din lantul hotelier Windham, Daniel Ben- Yehuda, spune ca in anumite hoteluri tarifele au scazut cu peste 25%.

“Acest lucru ne arata faptul ca hotelurile din Bucuresti au inceput un razboi greu al preturilor! Prima expresie care imi vine in minte referitor la piata hoteliera din Bucuresti este “panica inutila”. Cred ca razboiul preturilor a facut mai mult rau decat bine, iar pe termen lung ne vom lupta cu sarcina dificila de a creste preturile, ceea ce in conditiile actuale este imposibil. Imi aduc aminte ca intre 2006 si 2008 ii criticam cu totii pe hotelierii din Ungaria pentru tarifele foarte mici, iar acum tarifele noastre de cazare sunt si mai mici! Este adevarat ca oferta este mai mare decat cererea, dar chiar si in aceste conditii, hotelurile de 4 si 5 stele nu au motive sa aiba tarife atat de mici.” spune Daniel Ben- Yehuda.

Chiar daca pietele hoteliere din Europa Centrala si de Vest dau semne de crestere in a doua jumatate a lui 2010, Romania va avea un drum mai lung de parcurs spre recuperare, potrivit directorului general al hotelului de cinci stele JW Marriott (www.marriott.com), Igael Porecki.

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Directoul general al hotelului Marriott mai spune si ca, in incercarea de a gasi ofertele cele mai ieftine, multi clienti renunta la loialitatea pentru o anumita marca hoteliera si aleg hoteluri mai ieftine.

“2010 a fost un an mai dificil decat 2009 pentru piata hoteliera, din cauza reducerii continue a bugetelor, impusa de companii si a cererii in scadere pe piata din Romania. Desi avem semnale ca pietele din Europa Centrala si de Vest se recupereaza incet in a doua jumatate a lui 2010, va dura o perioada pana cand valul recuperarii va ajunge in Romania. Fiecare hotel lupta pentru partea sa, pentru ca cererea este mult mai mica decat oferta, iar loialitatea clientilor pentru o anumita marca, a scazut.” spune Igael Porecki.

In ciuda optimismului ponderat exprimat de majoritatea hotelierilor, exista si specialisti care prevad un declin mai accentuat al pietei hoteliere anul viitor. Directorul general al companiei de consultanta turistica Trend Hospitality, Tinu Sebesanu, spune ca multe hoteluri ar putea fi inchise in 2011, iar capacitatea de cazare ar putea scadea cu peste 10% in Romania. “Situatia pietei hoteliere este mai dificila in 2010, decat in 2009, pentru ca hotelierii nu mai au resurse financiare pentru sustine pierderile pe care le-au inregistrat in ultimul an si jumatate.” a declarat Tinu Sebesanu pentru Mediafax.

Esecul turismului de leisure

In ultimii doi ani piata hoteliera din Bucuresti a fost una dintre cele mai afectate piete din regiune. In timp ce alte capitale precum Praga si Budapesta, renumite pentru arhitectura si obiectivele turistice cu incarcatura istorica, si-au putut contracara pierderile pe segmentul de business cu un grad de ocupare ridicat pe segmentul de leisure, in special in weekend-uri, hotelurile din Bucuresti au trebuit sa se confrunte cu realitatea cruda a bugetelor reduse pentru calatoriile de afaceri.

“Cred ca Praga, Budapesta si ale pietele hoteliere Est europene s-au confruntat cu acelasi nivel de criza ca si Bucurestiul. Singura diferenta este ca aceste capitale se pot baza pe turismul de leisure pentru a-si umple hotelurile, in timp ce in Bucuresti, turismul de leisure este practic inexistent.” spune Daniel Ben- Yehuda.

“Atractivitatea unei capitale pentru turism depinde de mai multi factori printre care: infrastructura disponibila, facilitatea de a vizita si alte obiective din proximitatea orasului, pachetele tematice oferite (culturale, muzicale, etc.) si, nu in ultimul rand, cunoasterea / renumele acelei destinatii. Tarifele sunt competitive cu cele de pe alte piete din regiune, ceea ce diferentiaza Bucurestiul de Praga sau de Budapesta este notorietatea turistica, renumele, nu in mod special tarifele de cazare.” explica Sonia Nastase.

Linda Griffin a observat similitudini intre evolutia Bucurestiului si a Budapestei, doua dintre cele mai afectate piete din regiune de criza financiara.

“Nu pot spune foarte multe despre alte piete din Europa de Est, intrucat sunt noua in aceasta regiune, cu toate acestea cred ca Budapesta trece in continuare printr-o perioada dificila, la fel ca Bucuresti. Inteleg ca Viena incepe sa aiba o dezvoltare pozitiva.” spune Linda Griffin.

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Potrivit Elenei Dumitrescu indicatorul RevPAR a scazut in 2009 comparativ cu 2008, cu aproximativ 5% fata de alte piete Est europene, cu exceptia Rusiei, in timp ce in Romania cifrele prezentate de CBRE reflecta o crestere mult mai mare a RevPAR, de aproximativ 38%.

“Cred ca avand in vedere toate hotelurile deschise, majoritatea apartinand lanturilor internationale, alaturi de tarifele atractive si ofertele diversificate si targhetate pentru fiecare segment de clienti in parte, piata hoteliera din Bucuresti, cel putin si-a mentinut cu succes, daca nu chiar si-a imbunatatit competitivitatea in regiune.” spune Elena Dumitrescu.

Mobilitatea personalului tinuta sub control

Flexibilitate, solutii creative, externalizarea serviciilor, management strict al costurilor, concentrare pe segmentul de evenimente, sunt cateva dintre ingredientele principale ale strategiilor care, alaturi de reducerea preturilor, i-au ajutat pe hotelieri sa supravietuiasca si chiar sa chiar sa inregistreze crestere in ultimii doi ani.

Capital Plaza, care s-a deschis in octombrie 2010 a reusit in numai un an sa atinga un grad de ocupare similar cu cel al celorlalte hoteluri de 4 stele de pe piata si aceste rezultate au fost posibile si datorita numarului mare de evenimente sociale organizat de hotel, care au atras un numar mare de clienti.

“In ceea ce priveste gradul de ocupare, am avut un decalaj de 5-6 la suta fata de celelalte hoteluri de patru stele prezente de cativa ani pe piata din Bucuresti. Anul trecut si anul acesta am reusit sa ne facem cunoscuti si sa ne castigam o clientela fidela organizand multe evenimente corporate si evenimente sociale: nunti, botezuri si petreceri private” spune Catalin Stefan.

Capital Plaza are 95 de camere, un restaurant cu specific mediteranean, o cafenea si cinci sali de conferinte cu o capacitate totala de 250 de locuri.

Criza a temperat si mobilitatea personalului, care era foarte mare pe piata hoteliera. Acum angajatii se lupta sa isi pastreaza locurile de munca si multi dintre ei sunt mai concentrati pe cerintele clientilor, lucruri care au condus la imbunatatirea serviciilor, potrivit Cristinei Solomon.

“Stabilitatea personalului a ajutat hotelul sa reziste in perioada de criza. Angajatii au devenit mai atenti si mai amabili cu toti clientii pentru ca le-am explicat si se pare ca ei au inteles ca acestia sunt cei care in ultima instanta ne platesc salariile. Este mult mai usor sa te concentrezi pe o strategie de depasire a situatiei atunci cand nu trebuie sa iti faci grija ca trebuie sa instruiesti oameni noi si sa-i faci sa inteleaga politica hotelului.” spune Cristina Solomon.

Gradul de ocupare al hotelului Tempo a scazut la 51% in 2010, fata de 53% in 2009, iar tarifele de cazare s-au micorat cu 34% in 2010. Dar hotelul a reusit sa ramana pe profit, desi profitul a scazut cu 47,11%.

Linda Griffin crede ca o problema majora a pietei hoteliere din Romania este numarul redus de profesionisti, intrucat oportunitatile de pregatire in scoli de specialitate sunt limitate in acest

moment.

“Am inteles ca nu exista multe scoli specializate in domeniul hotelier in Romania, iar profesionistii din domeniu au nevoie de o educatie potrivita in acest domeniu. Oamenii care aleg sa lucreze pe piata hoteliera ar trebui sa aiba ocazia de a studia aceasta profesie, sa aiba oportunitati care pot parea intangibile initial.”

In 2009 si in 2010 atat Ramada Plaza, cat si JW Marriott si-au externalizat multe activitati si si-au renegociat contractele cu furnizorii de servicii, pentru a reduce cheltuielile inutile.

In 2010 gradul de ocupare a scazut cu 5% in cazul hotelului Ramada Plaza, fata de 2009 , iar tarifele de cazare au scazut intre 15% si 20%. Si cifra de afaceri a hotelului a scazut intre 5% si 10%, potrivit lui Daniel Ben- Yehuda.

“Numarul de clienti a crescut in prima jumatate a lui 2010, fata de prima jumatate a lui 2009, iar veniturile au scazut usor, ca urmare a reducerii tarifelor.” explica Igael Porecki.

Imagine noua, clienti noi

Pentru a mentine interesul clientilor si a creste gradul de ocupare, cu ajutorul unei imagini noi, majoritatea hotelurilor au trecut prin renovari. Unele au schimbat design-ul si mobila, altele au facut investitii importante in rebranduirea si renovarea restaurantelor si cafenelelor.

Athenee Palace Hilton a terminat lucrarile de renovare, care au inclus deschiderea la parter a noului restaurant Cafe Athenee, care inlocuieste fostul restaurant Le Bistro, renovarea holului hotelului si a zonei Le Collonnade. Investitiile s-au ridicat la 2 milioane de Euro. Restaurantul Roberto's va intra intr-un proces de renovare la inceputul lui 2011. Restaurantul “Brasserie” va fi transformat intr-un spatiu de retail, care va fi inchiriat unui singur client.

„Pana acum restaurentul a fost primit foarte bine de clienti. Reactiile lor fata de aspectul si atmosfera restaurantului Café Athenee si fata de meniul si conceptul restaurantului, sunt pozitive.” spune Linda Griffin.

Howard Johnson a renovat holul si Bar & Lounge CENTRO. Si parcare subterana si centrul de conferinte au trecut printr-un proces de modernizare, potrivit Soniei Nastase.

„Investitiile pe care le-am facut in fiecare an incep sa se reflecta in cresterea productivitatii si in cresterea satisfactiei clientilor. De asemenea, pentru ca grupul are o strategie concentrata pe impactul asupra mediului, am urmarit obiective precum reducerea consumului de energie si de apa, reducerea emisiilor de CO2 si a generarii de deseuri cu 20% pana in 2012. “ spune Elena Dumitrescu.

„Mai avem de facut doua investitii majore pentru a completa proiectul centrului de conferinte Ramada Plaza convention center proiect, cel mai mare centru de conferinte din Bucuresti (2500 sq/meter), proiect amanat in acest moment. Alta investitie se refera la piscina si la spa-ul pe care speram sa le finalizam in 2011.” explica Daniel Ben- Yehuda.

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JW Marriott a trecut printr-un proces de renovare mai complex, care va continua si in 2011. Sala de conferinte si evenimente Grand Ballroom, Vienna Café si Vienna Lounge, de la primul etaj au fost renovate complet, iar meniul a fost imbunatatit, potrivit lui Igael Porecki. Investitiile s-au ridicat la 1,2 milioane Euro.

In acest moment este renovat restaurantul Cupola, din cadrul hotelului, care va fi redenumit JW Steakhouse si va include si un bourbon bar. Lucrarile de renovare vor continua in ianuarie si februarie 2011, cu Constanta ballroom si cu restul salilor de conferinte.

Planuri de expansiune

In 2010 piata hoteliera din capitala a atins o capacitate de 9.000 de camere, in hotelurile de 3 si 5 stele, potrivit agentiei de consultanta imobiliara Jones Lang LaSalle. Intre 2006 si 2008, au mai fost livrate inca 3.000 de camere noi pe piata, deschiderea hotelului de patru stele Rin Grand Hotel si cea a hotelului de cinci stele Radisson Blu cumuland 1.200 din aceste camere. In 2009, hotelul de patru stele Capital Plaza (95 de camere), aparthotelul de patru stele Starlight Suiten (78 de apartamente), hotelul de patru stele Phoenicia Express (180 de camere), aparthotelul de patru stele Phoenicia Aparthotel (55 de apartamente) si boutique hotelul de cinci stele Grand Hotel Continental (59 de camere) au adaugat alte 529 de camere la piata hoteliera din Bucuresti, potrivit consultantilor imobiliari CBRE Eurisko.

In ciuda crizei economice alte 567 de camere de hotel vor fi livrate pe piata pana in 2012, potrivit lui JLL. Lantul hotelier american Hilton Worldwide a anuntat deschiderea hotelului de patru stele Doubletree in Bucuresti, in 2011, al doilea hotel al lantului in capitala, dupa Athenee Palace Hilton, de pe Calea Victoriei, deschis in 1996. Hotelul va fi deschis in fransiza, va include 88 de camere si va fi o conversie a hotelului Bucharest City din Piata Unirii. Un alt hotel Doubletree by Hilton se va deschide la inceputul anului viitor in Oradea (judetul Bihor). Hilton va mai deschide in 2011 si primul sau hotel economy, sub brandul Hampton, in Brasov.

Pana la finalul lui 2012, lantul hotelier american, JW Marriott, prezent in Bucuresti cu un hotel de cinci stele, va deschide un hotel de patru stele, marca Courtyard, in capitala. Hotelul va fi localizat in Piata Unirii si va avea 198 de camere. Dezvoltatorul imobiliar roman Marvel Group, proprietarul aparthotelului Monte Carlo Palace, construit in zona Piata Presei, va deschide un hotel de cinci stele pe Calea Victoriei, langa hotelul Radisson Blu. Hotelul Galerie Vendome va avea 120 de camere si se va deschide in 2012, potrivit directorului general al Monte Carlo Palace, Edward Popescu.

Si alte lanturi hoteliere internationale, care nu sunt prezente inca in Romania, si-au exprimat intentia de a intra in tara in urmatorii ani, dar planurile lor sunt in asteptare in acest moment, din cauza instabilitatii economice, fiscale si politice. Lantul hotelier spaniol Sol Melia si-a anuntat vara trecuta planurile de a deschide hoteluri de patru si cinci stele sub brandurile Tryp si Melia Hotels & Resorts in Romania. Primul hotel se va deschide pe coasta Marii Negre, dar operatorul hotelier nu a mentionat nicio data clara de deschidere. Lantul Whyndham Hotels va deschide anul viitor primul sau hotel de trei stele in Romania, sub brandul Days Inn. Hotelul se va deschide langa Sibiu, iar lantul cauta oportunitati de extindere si in Bucuresti, Brasov si Cluj. Sheraton Hotels, parte din lantul american US Starwood Hotels and Resorts negociaza, de

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asemenea, deschiderea primului sau hotel in Romania, in Cluj. Un alt brand detinut de Starwood, Le Meridien, a anuntat deschiderea unui hotel de cinci stele pe Calea Victoriei, dar planurile au fost anulate in final.

“In acest moment Bucurestiul si Romania se afla in topul listei de asteptari a tuturor lanturilor hoteliere importante. Aceste lanturi sunt constiente ca tara este o poarta de trece majora intre est si vest si ca Romania este foarte importanta in portofoliul lor, dar sunt constiente si de toate dificultatile prin care trece industria hoteliera, asa incat cred ca nu le vom vedea intrand pe aceasta piata sau extinzandu-si prezenta, pana cand trendul negative nu se va schimba.” explica Daniel Ben- Yehuda.

Directorii generali ai hotelurilor Capital Plaza si JW Marriott considera ca piata hoteliera din Bucuresti a atins deja saturatia in ceea ce priveste numarul de camere de patru si cinci stele.

“Pe segmentul de leisure cred ca sunt suficiente camere de hotel, pentru ca Bucurestiul nu este o destinatie turistica, cum sunt alte capitale, in care traficul este foarte mare in weekend. Piata hoteliera a atins saturatia si nu mai poate absorbi multe camere de hotel.” considera Catalin Stefan.

Pe de alta parte Linda Griffin vede un echilibru intre expansiunea rapida, dar nu atat de sanatoasa a pietei hoteliere si volumul mare de camere de hotel, care a transformat Bucurestiul intr-o destinatie atractiva pentru segmentul de conferinte.

“Piata hoteliera din Romania evolueaza. Este o piata in crestere si are inca loc pentru dezvoltare si pentru a atrage mai multi clienti de leisure si de afaceri. In ceea ce priveste industria hoteliera, piata s-a extins rapid in ultimii cativa ani, sub presiunea crizei economice, o combinatie care nu a fost atat de pozitiva pentru hoteluri. Pe de alta parte acest lucru a fost bun pentru clienti, pentru ca a determinat scaderi de pret semnificative. In acelasi timp volumul de camere de hotel ofera Bucurestiului ocazia de a atrage turism pe segmentul de conferinte. Bucurestiul detine o capacitate de cazare de calitate, suficient de mare si ar trebui sa incerce sa atraga conferinte mai mari, lucru care, am inteles ca nu s-a intamplat inca, pentru ca nu exista nicio organizatie in spatele acestei initiative. Organizarea de congrese ar trebui sa fie posibila intrucat Casa Poporului are o sala de conferinte foarte mare, care poate fi folosita pentru evenimente si expozitii mari.” explica directorul general al of Athenee Palace Hilton