

HOTEL yearbook 2010

What to expect in the year ahead

**Sir David Michels on the shape
of the coming recovery**

**The outlook for 20 key markets,
from China and the USA
to Germany, Brazil and Libya**

**Is it time to change in-room
technology standards?**

**How the crisis
will affect luxury in 2010**

**Editorial input from 25 hotel
industry CEOs**

This excerpt from the Hotel Yearbook 2010 is brought to you by :



Ecole hôtelière de Lausanne

The Ecole hôtelière de Lausanne (EHL) is the co-publisher of The Hotel Yearbook. As the oldest Hotel School in the world, EHL provides university education to students with talent and ambition, who are aiming for careers at the forefront of the international hospitality industry. Dedicated to preparing tomorrow's executives to the highest possible level, EHL regularly adapts the contents of its three academic programs to reflect the latest technologies and trends in the marketplace. Since its founding in 1893, the Ecole hôtelière de Lausanne has developed more than 25'000 executives for the hospitality industry, providing it today with an invaluable network of contacts for all the members of the EHL community. Some 1'800 students from over 90 different countries are currently enjoying the unique and enriching environment of the Ecole hôtelière de Lausanne.



Boutique DESIGN New York

Boutique DESIGN New York, a new hospitality interiors trade fair, will coincide with the 94-year-old International Hotel/Motel & Restaurant Show (IH/M&RS). Designers, architects, purchasers and developers will join the hotel owners/operators already attending IH/M&RS to view the best hospitality design offerings as well as explore a model room, exciting trend pavilion and an uplifting illy® networking café.



Hospitality Financial and Technology Professionals (HFTP)

HFTP provides first-class educational opportunities, research and publications to more than 4'800 members around the world. Over the years, HFTP has grown into the global professional association for financial and technology personnel working in hotels, clubs and other hospitality-related businesses.



Bench Events

Bench Events host premier hotel investment conferences including the International Hotel Investment Forum; the Arabian Hotel Investment Conference and the Russia & CIS Hotel Investment Conference. Bench Event's sister company, JW Bench, is a benchmarking company that has launched the Conference Bench and the Productivity Bench. An industry first, the Conference Bench, measures performance data for conference space in hotels throughout Europe.



Cornell University School of Hotel Administration

Founded in 1922, Cornell University's School of Hotel Administration was the first collegiate program in hospitality management. Today it is regarded as one of the world's leaders in its field. The school's highly talented and motivated students learn from 60 full-time faculty members – all experts in their chosen disciplines, and all dedicated to teaching, research and service. Learning takes place in state-of-the-art classrooms, in the on-campus Statler hotel, and in varied industry settings around the world. The result: a supremely accomplished alumni group-corporate executives and entrepreneurs who advance the industry and share their wisdom and experience with our students and faculty.



Hsyndicate

With an exclusive focus on global hospitality and tourism, Hsyndicate.org (the Hospitality Syndicate) provides electronic news publication, syndication and distribution on behalf of some 750 organizations in the hospitality vertical. Hsyndicate helps its members to reach highly targeted audience-segments in the exploding new-media landscape within hospitality. With the central idea 'ONE Industry, ONE Network', Hsyndicate merges historically fragmented industry intelligence into a single online information and knowledge resource serving the information-needs of targeted audience-groups throughout the hospitality, travel & tourism industries... serving professionals relying on Hsyndicate's specific and context-relevant intelligence delivered to them when they need it and how they need it.



WATG

Over the course of the last six decades, WATG has become the world's leading design consultant for the hospitality industry. Having worked in 160 countries and territories across six continents, WATG has designed more great hotels and resorts than any other firm on the planet. Many of WATG's projects have become international landmarks, renowned not only for their design and sense of place but also for their bottom-line success.

elevation



WATG re-invented the resort to reflect the magic of Kauai by paying homage to the unique island and its culture.

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THOUGHT LEADER



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WATG's director of sustainability talks about how the recession has impacted green design.

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Yes we can !

That's the message of **MMATŠATŠI MAROBE**, CEO of the **TOURISM BUSINESS COUNCIL OF SOUTH AFRICA (TBCSA)**, who shares with us her confidence in South Africa's capabilities, and her hopes for even greater improvement in the service orientation of the many people who will make a difference in the quality of the experience of visitors to next year's World Cup.

Thanks to the upcoming FIFA 2010 World Cup™, South Africa's major cities have been turned into temporary « construction sites. » So much so, that many of us have become accustomed to the sight of some advertising wrap covering a major building development or the unavoidable traffic jams even when it is not peak hour, as development of the country's major highways gets underway.

New hotel developments and expansions

These are exciting times for the hospitality sector. In anticipation of the tournament, the sector has seen a steady increase in new hotel developments by major global hospitality brands, particularly in the Southern African region. I am proud to note that these international organizations, which include the likes of Accor, the Rezidor and the Starwood hotel groups, are not only focused on operating within the SADC region but are looking to expand their operations to other parts of the continent as well.

Major local hospitality brands such as the Southern Sun, African Sun and Protea hotel groups are following on the global trend to take on the African hospitality market by storm. These organizations are also expanding their operations into Africa, in recognition of the great potential on offer. As an avid advocate of investment in the hospitality sector through my association with the Hospitality Investment Conference Africa (HICA), I strongly support these expansions as they affirm the notion of Africa as a viable investment destination. Beyond 2010, we need to still see more hotels, guest houses and areas of recreation being developed and it is through projects such as these that the sector's growth can be sustained and continue.

Much as we count the number of beds available in preparation for a major event such as the World Cup, we need to be mindful of the bigger picture: Investment in the hospitality sector goes far beyond ensuring the availability of accommodation but has a ripple effect on other macro-economic issues such as unemployment, skills development and overall economic growth of the specific areas where investment takes place.

Travel within Africa

It is pleasing for me to note that the local tourist pool is growing. As tourist arrivals from the more traditional markets begin to dwindle, it is only natural for countries to take a closer look at domestic tourism to boost their local industries. For South Africa, it is even more pleasing that the country does not only have to look at just its domestic tourism market but that we acknowledge and take advantage of an emerging trend that more and more Africans are travelling within their own continent. Although the current travel trends are still skewed toward travel to South Africa, with political stability in countries such as Kenya, Mozambique and Nigeria and development in the hospitality industries in such countries, we are sure to see more South Africans seeking business and leisure opportunities in these areas.

And why shouldn't Africans travel more in their own continent? Their international counterparts are already doing it. The latest figures from the UNTWO show that in the first seven months of 2009, all destinations globally experienced a decrease in tourist arrivals from 2008 levels, except for Africa, which showed a rise in figures by 4%. Surely if the rest of the world is recognizing the value for money that can be gained from travelling to various parts of the continent, Africans can as well. Given that well-recognized hotel chains are now venturing into other parts of the continent, there is an opportunity here for tourism destinations to work harder in stimulating the demand to travel around the continent as well.

2009 FIFA Confederation Cup – what have we learned ?

Ever since South Africa was named as the host of the 2010 FIFA World Cup™, infrastructure development has been a big focus area. Some of our detractors have been painting a picture of doom and gloom around the country's hosting capabilities, arguing among other things that the building of stadia will not be completed on time, citing an aging road network and a highly unregulated and informal public transport system as well as fuelling concerns around the country's safety and security among other issues. ►



South Africa
is ready to
roll out the
red carpet!

Indeed the infrastructure development is important and will create a legacy for the country beyond the soccer tournament; however. I am proud to say that through the hosting of the 2009 FIFA Confederations Cup™ we have showed the «doubting Thomas's» within and outside our country that we are well on our way to staging one of the most successful and most entertaining FIFA World Cup tournaments.

But before we get ahead of ourselves, the 2009 FIFA Confederation Cup should still be seen as a real eye-opener for the hospitality sector and other sectors of the country, in particular the transport sector.

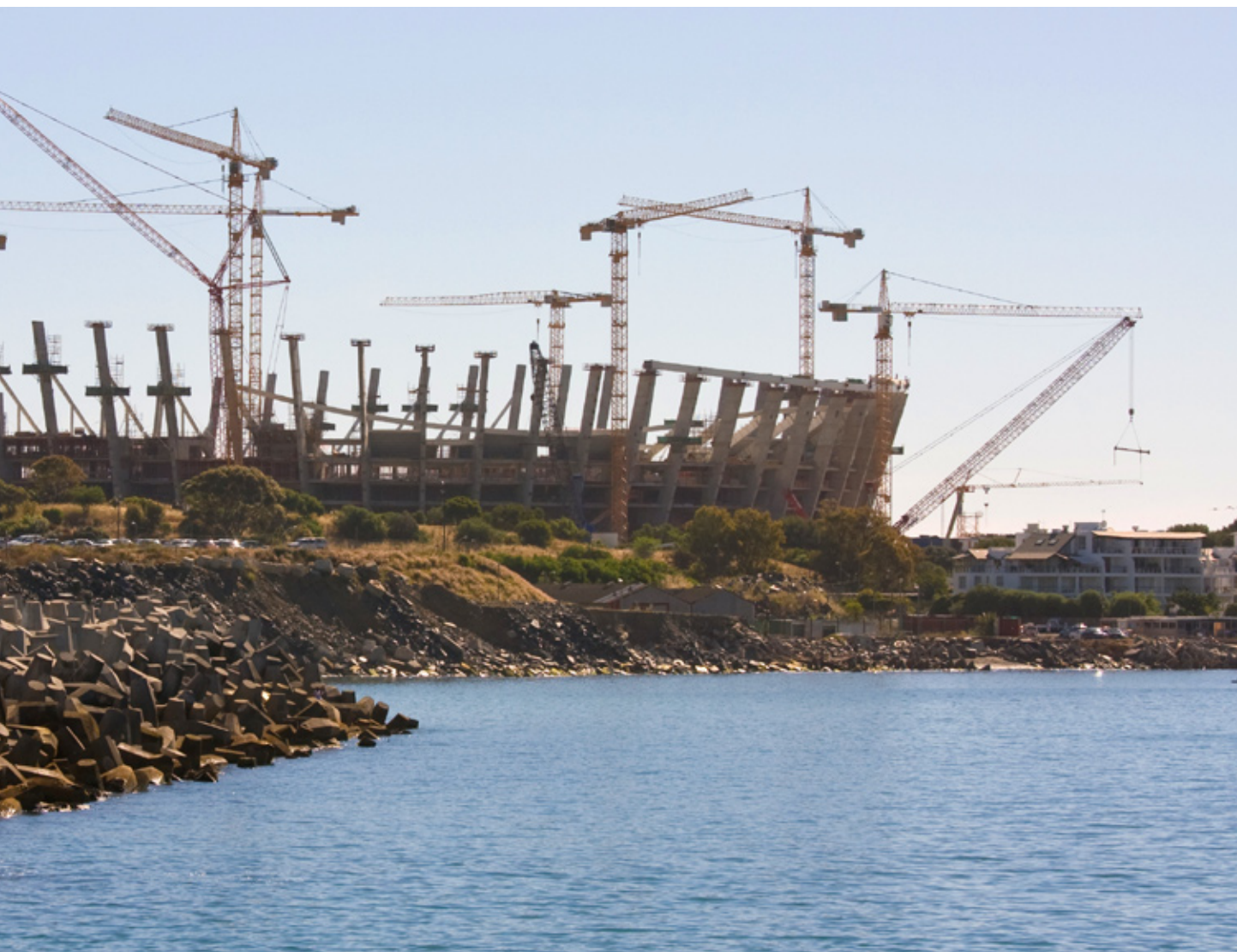
The issue of accommodation posed a real challenge to the sector, since the country has more than enough accommodation to satisfy the 55,000 beds required by MATCH Event Services, FIFA's ticketing and hospitality partners – but they are not all situated in easily accessible locations. Although MATCH has made a lot of headway to secure rooms from the industry, this issue highlighted the dire need for more investment in the sector, especially in the urban areas, while at the same time raising the issue of transportation as the key.

The Confederations Cup also highlighted the need to pay closer attention to our service delivery. While most of the people who visited the Confederations Cup experienced great service in the country, the nagging issue remains the inconsistencies in service delivery across all sectors in the country especially among the smaller product and service providers. For instance, we need to ensure that ushers at the various event platforms are well-trained, service oriented and knowledgeable about the event logistics. Most importantly, we must also deal with the issue of resolving industrial disputes in time before any major event in the country.

Like the issue of infrastructure development, improvement of service levels particularly in the sector will also leave a lasting legacy. The Tourism Business Council of South Africa has entered into a private and public sector partnership with the National Department of Tourism to take concrete steps to address service delivery in the sector. We are hoping to see the



trend of improved service levels spreading beyond our industry into other service level touch points that tourists encounter when they visit our country – be it in the local fuel station or a taxi ride.



In closing, one cannot ignore the enormous impact of hosting large sport events in the country and we hope that this is a trend that will certainly stand us in good stead beyond hosting the FIFA world cup. In the midst of the global economic crisis, our country has hosted the Indian Premier League Tournament, the FIFA Confederations Cup as well as the British and Irish

Lions Tour within a short space of time. Thus one cannot ignore the impact that these major events have on South Africans. We certainly believe that the world will positively experience a World Cup with a difference in Africa. After all, it's Africa's time and South Africa is ready to roll out the red carpet! ■