



196+ roundtable  
ukraine+

belarus, ukraine

online  
(10.06.2021)

37  
participants

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#### NOTES

1) calculated as per PKF sample; includes all  
properties with at least 100 rooms; 2) as per 31  
December 2020; 3) as per the PKF contract  
database; 4) from the viewpoint of hotel groups

## supply

<b>247</b> properties	<b>47,119</b> rooms <sup>1</sup>
<b>18%</b> branded rooms	<b>29%</b> chain affiliated rooms

### group / brand profile

- › strongest brand: **Premier**
- › strongest group: **Premier**
- › strongest regional brand  
(global presence): **Premier**

## key takeaways

- › The decline in Kyiv 2020 RevPAR at -64% was the least impacted in East Europe markets, others at -68% to -81%. Q1 2021 in Kyiv had the strongest recovery in East Europe and as of May, ADR is almost at 2019 levels.
- › Hoteliers focused on retaining their staff over the past year, hours were cut (66% salary levels mandatory) and there were few layoffs, but a considerable number of employees moved on.
- › Odessa is recovering slightly faster than Kyiv, and the Carpathian region, including resorts such as Bukovel, Yaremche, Truskavets, have increased in development attractiveness.
- › Despite reports of large tourism & infrastructure funds, there has been negligible support from the government (one month land tax relief & limited grants) for the hospitality industry over the past 15-months. However, through lobbying, the reduction of VAT to 7% since 1 January 2021 is a significant benefit.
- › The regional experts panel considered attractive ideas for development in hospitality to be a full-service coastal all-inclusive hotel resort in southern Ukraine, an apart hotel in the centre of Kyiv, and innovative ecosystem spaces such as the Promprylad in Ivano-Frankivsk.

## pipeline

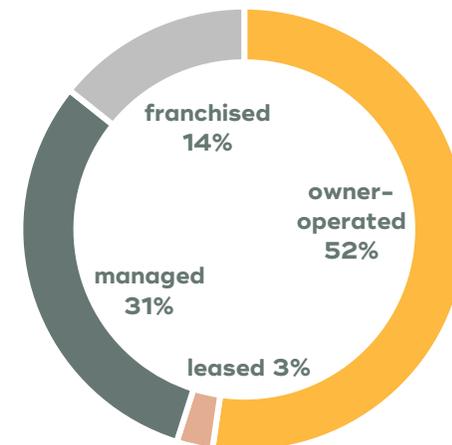
<b>35</b> properties	<b>9,775</b> rooms <sup>1,2</sup>
<b>17</b> hotels under construction	<b>18</b> planned hotels

### selected openings of 2020

- › Globe Runner Hotel & Hostel, Kyiv, **38 rooms**
- › Alice Place Hotel, Odesa, **30 rooms**
- › Kulikovskiy Hotel, Kharkiv, **25 rooms**
- › Shelest Hotel, Vyshhorod, **25 rooms**
- › Oysters & Bubbles Gastro Hotel, Lviv, **19 rooms**

## contracts

<b>50</b> properties	<b>10,630</b> rooms under contract <sup>2,3,4</sup>
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