PKF

HTLroundtable ukraine+	ukraine+	online (02.07.2020)	**49** participants

supply

225 properties; 42,138 rooms[1]

BRANDED ROOMS

22%

CHAIN AFFILIATED ROOMS

33%

GROUP / BRAND PROFILE

- strongest brand: Premier
- strongest group: Ukrproftour
- fastest growing brand: Mercure
- fastest growing group: Accor
- strongest regional brand (global presence): Premier
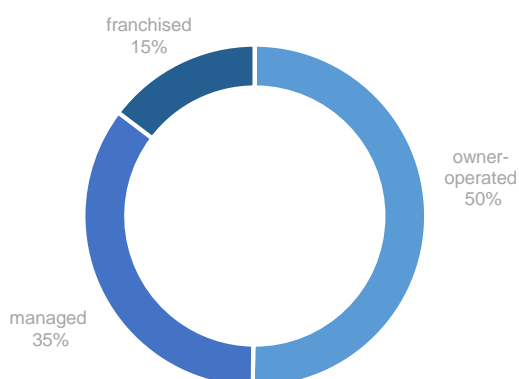
pipeline

33 properties; 9,551 rooms[1,2]

19 HOTELS UNDER CONSTRUCTION

14 PLANNED HOTELS

SELECTED OPENINGS of 2019

- Mercure Minsk Old Town, Minsk, 127 rooms

hotel contracts

51 properties; 10,580 rooms under contract[2,3,4]

franchised 15%

owner-operated 50%

managed 35%

key takeaways

- due to the COVID-19 quarantine, as well as the ban on international travel, up to 70% of hotels in the Ukraine were closed until mid-June
- demand for mountain and countryside resorts was higher than expected
- major tourism industry players (including HORECA, tour operators, etc.) prepared an action plan to support the industry and appealed to the Prime Minister and President requesting assistance; so far, some generic declarative measures are in place, but participants expect more effective government support
- the current situation is motivating different players in the tourism industry to unite in professional associations
- many employees of hotels and restaurants are on temporary leave with no pay
- so far, after easing of the quarantine restrictions, occupancy has reached a level between around 10% to 15%, while ADR has decreased by around 30% compared to last year
- it is expected that the recovery to pre-COVID crisis levels could take two or three years
- hotel market players expect huge changes in sanitation and hygiene measures to rebuild trust - in-room cleaning, a mask regime, social distancing and new standards for breakfast will become a focus
- a slowdown of new projects is expected due to the strong decline of demand and lack of financing – at the same time this creates the opportunity in the acquisition of existing i.e. distressed assets

HTL partners

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