

HTLroundtable eurasia	eurasia	online (18.06.2020)	34 participants
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supply

249 properties; 43,439 rooms¹

BRANDED ROOMS



CHAIN AFFILIATED ROOMS



GROUP / BRAND PROFILE

- strongest brand: Autograph Collection
- strongest group: Marriott
- fastest growing brand: Hilton
- fastest growing group: Hilton
- strongest regional brand (global presence): Qafqaz

pipeline

52 properties; 8,736 rooms^{1,2}

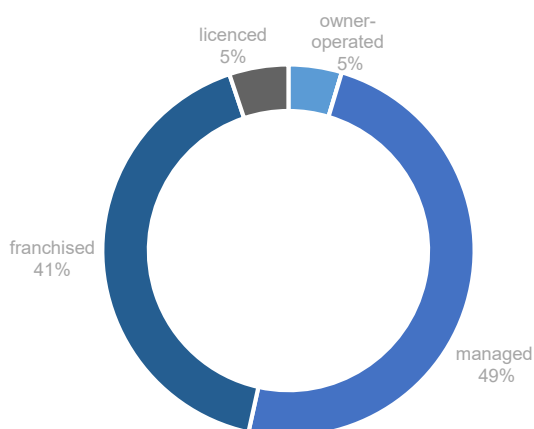


SELECTED OPENINGS of 2019

- Hilton Tashkent City, Tashkent, 258 rooms
- Ramada Hotel & Suites by Wyndham Yerevan, Yerevan, 202 rooms
- Novotel Almaty City Center, Almaty, 190 rooms
- Sheraton Bishkek, Bishkek, 183 rooms

hotel contracts

84 properties; 15,861 rooms under contract^{2,3,4}



key takeaways

- first international tourists since COVID-19 are expected in the region in July 2020 with Turkish Airlines flights starting to limited destinations
- PKF tourismexperts won a tender with the Austrian Development Agency in Georgia where we will be developing DMOs for a selected region.
- the economies in the region are mainly dependent on natural resources and earlier recoveries are expected in Tashkent, Uzbekistan with Gold prices increasing, along with Georgia due to its proximity to Russia, Turkey and Europe
- a recovery to 2019 performance levels is not expected before 2023 or 2024
- as is the case globally, operators in the region are currently implementing COVID-19 related hygiene measures and consider guest behavior will determine which of them will prevail in the long term - so far this is not influencing changes in design
- resort hotels are expected to recover earlier and location, flexibility and physical wellbeing offerings are expected to be more important for the future success of city hotels

HTL partners



HTLroundtables around the globe



learn more and find the HTLroundtables schedule at

www.pkfhotels.com

NOTES:

1) calculated as per PKF sample; includes all properties with at least 100 rooms; 2) as per 31 December 2019; 3) as per the PKF contract database 4) from the viewpoint of hotel groups