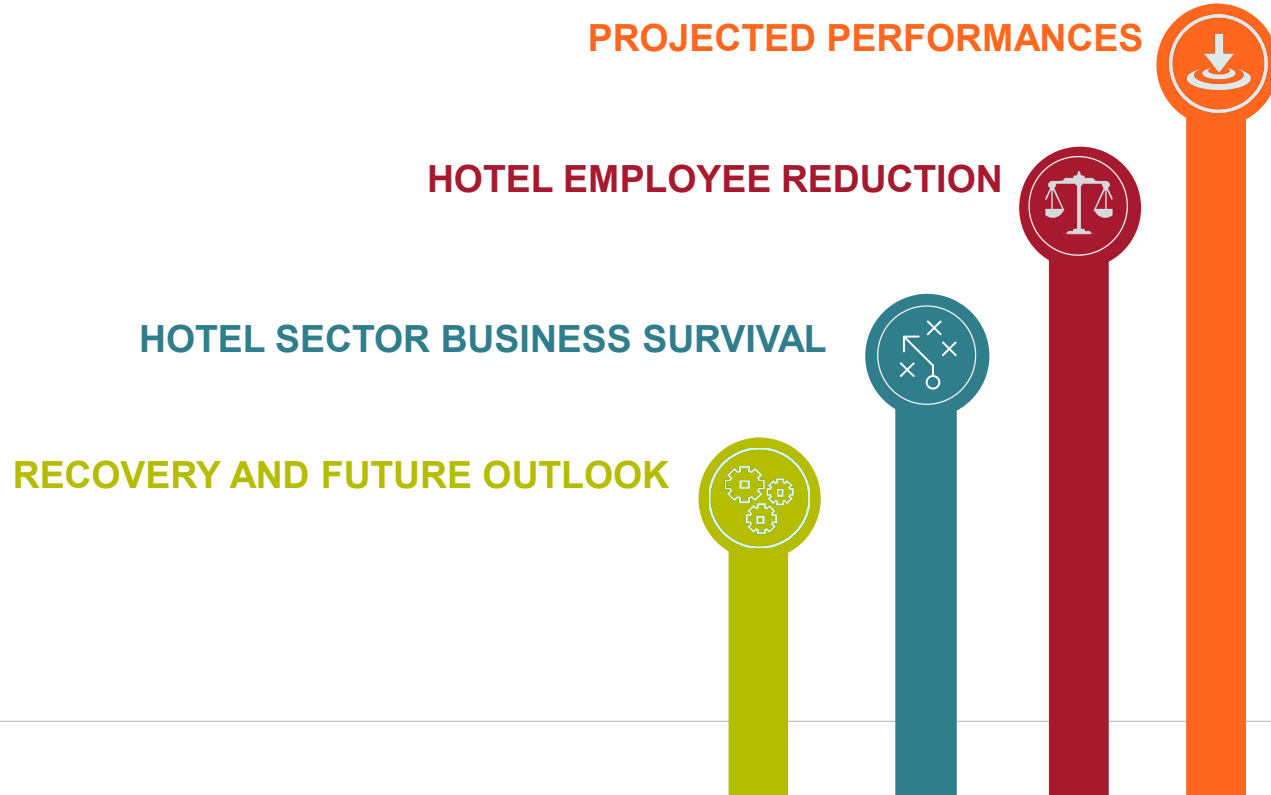


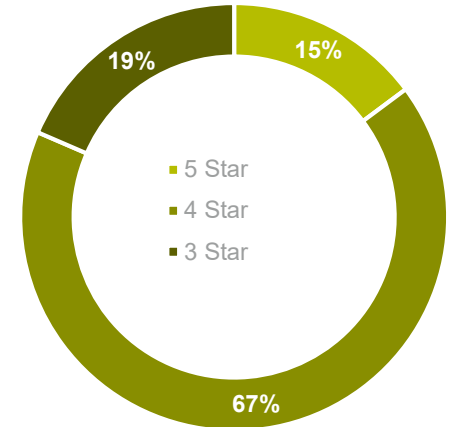
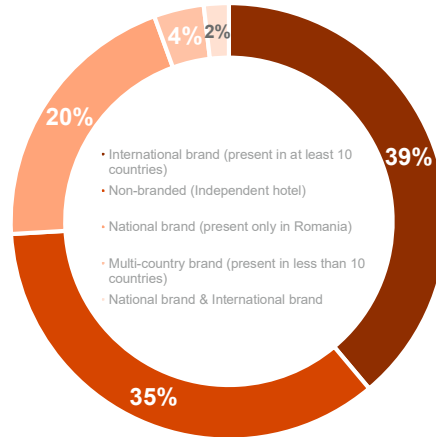
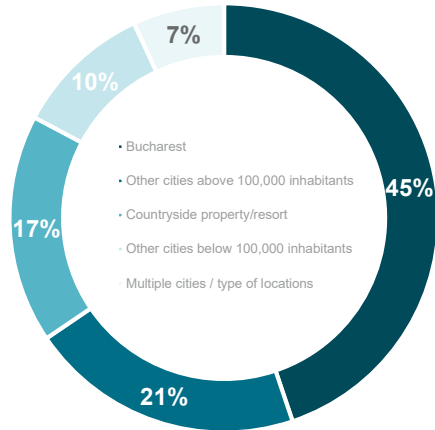


COVID 19 IMPACT SURVEY –
ROMANIA
H2 -2020



Respondents Overview

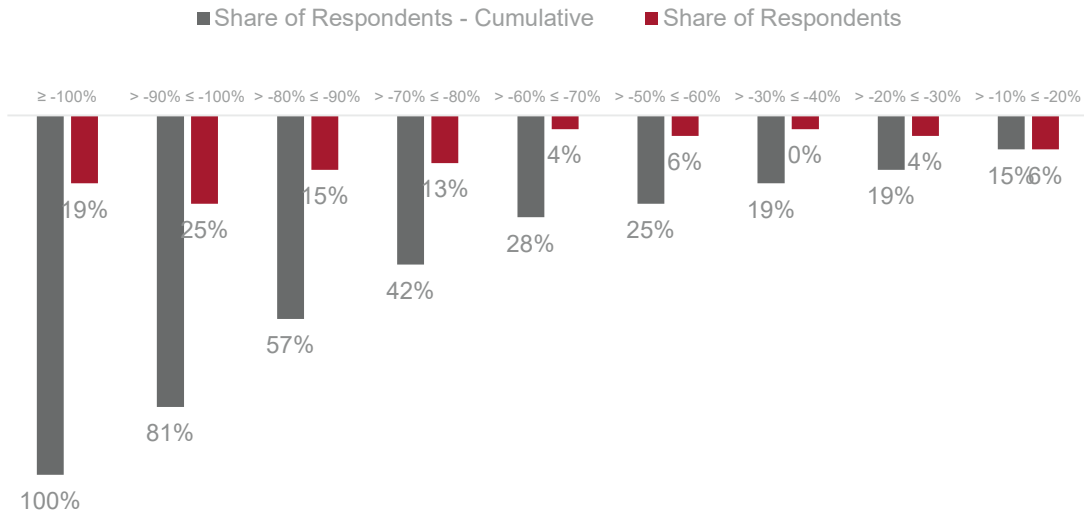
54 respondents



Respondents spread around the country and representing various hotel types and scales.

PROJECTED PERFORMANCES

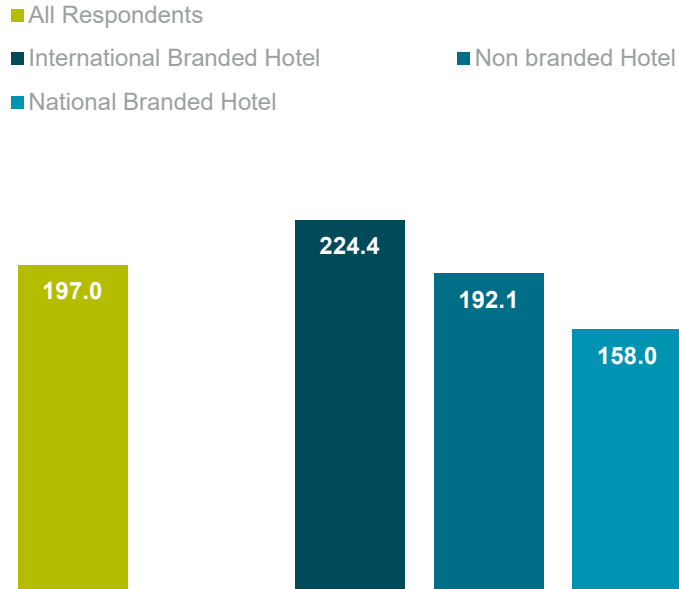
What is the decrease in profit registered in YTD October 2020 compared to YTD October 2019?



While the current restrictions are in place, a drastic decrease in demand is registered which brings along on average 73% decrease in profit.

PROJECTED PERFORMANCES

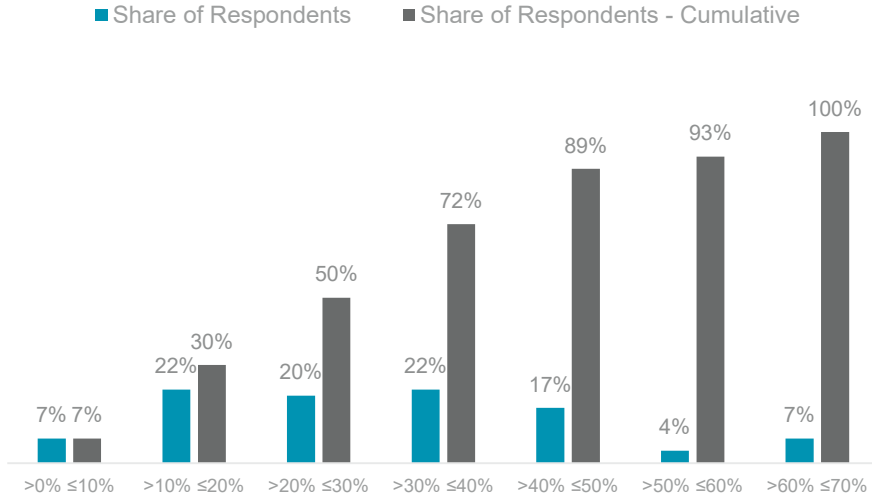
What is your projected annual ADR in 2021 in RON?



The total ADR in 2021 is projected to be lower than YTD October 2020; as hoteliers might want to appeal to domestic demand and adopt an occupancy strategy.

PROJECTED PERFORMANCES

What is your projected annual occupancy in 2021?

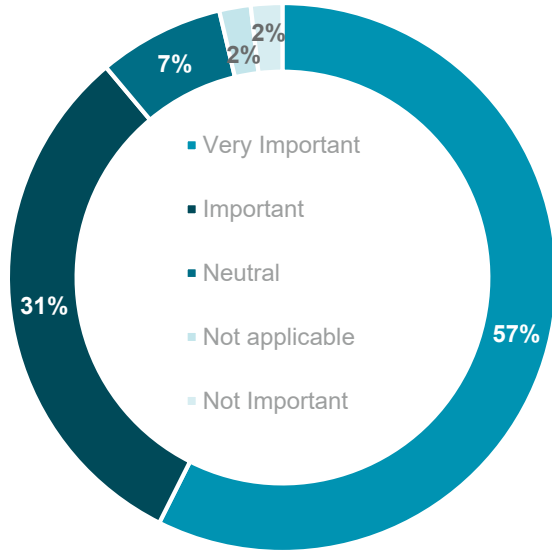


Hoteliers are focusing on a occupancy strategy; thus, projected occupancy is higher that October YTD 2020.

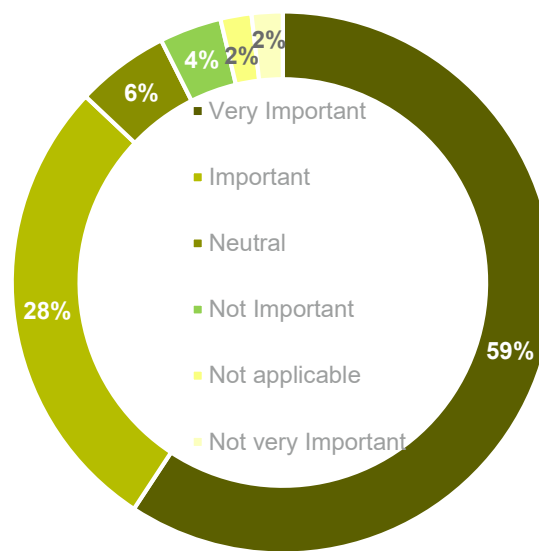
PROJECTED PERFORMANCES

How important is the revenue of the following outlets in the projections of 2021?

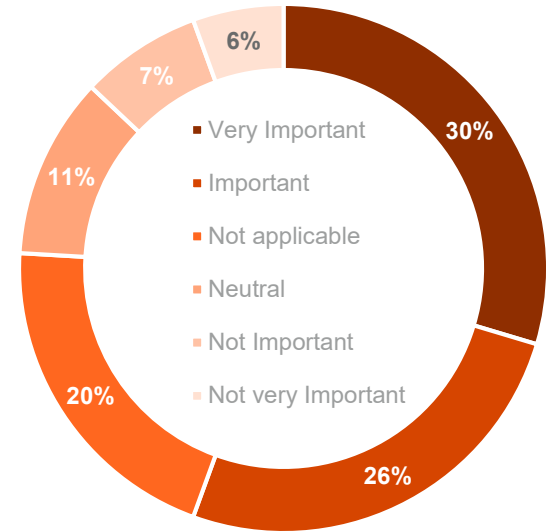
Restaurant & Bar



Conference/ Event facilities



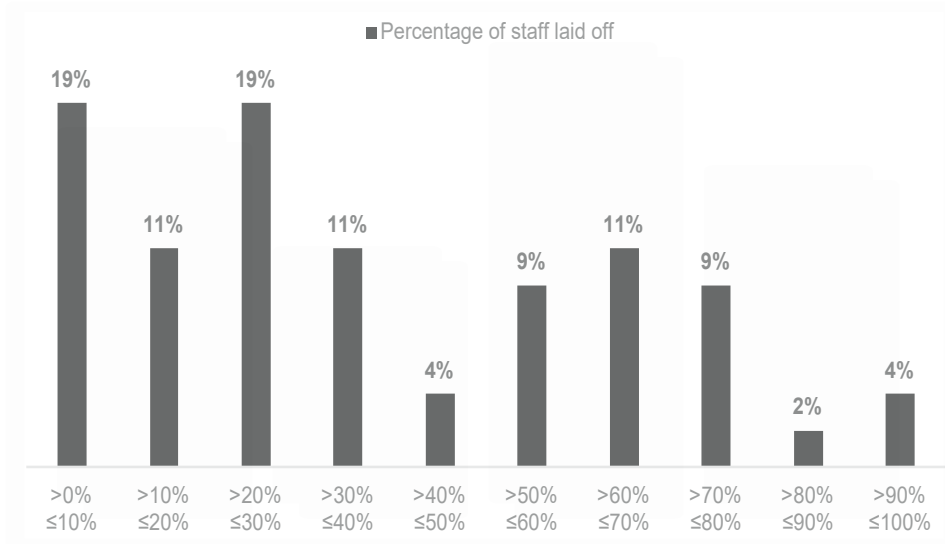
Spa and Wellness



The restaurants and Conference facilities remain an important revenue generator for 2021 projections. Spa and Wellness facilities are placed on third place of importance.

HOTEL EMPLOYEE REDUCTION

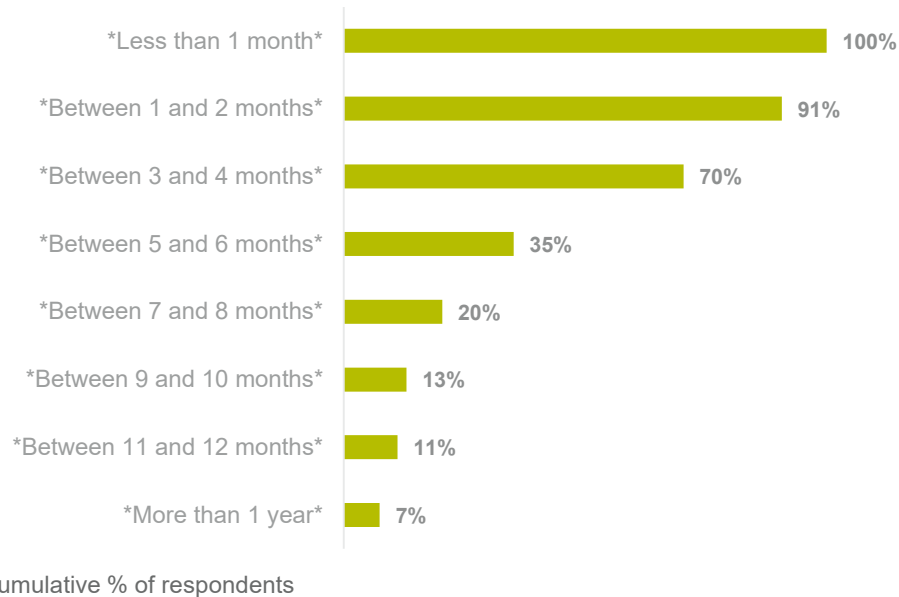
How many full-time staff members did you lay off due to COVID-19 crisis?



The amount of employees laid off is growing. Comparing this result with the previous survey performed between April and May 2020, this figure has increased by 6%.

HOTEL SECTOR BUSINESS SURVIVAL

How long do you think your business can survive with the current level of demand and government support?

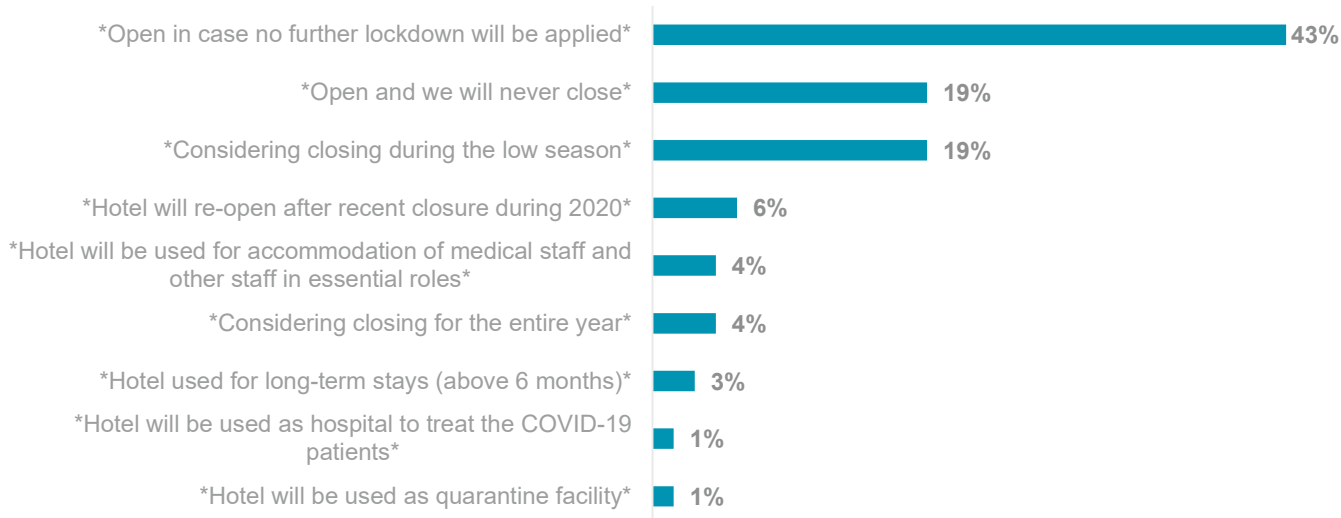


Without governmental support, the majority of hoteliers will not survive financially more than 4 months

RECOVERY AND FUTURE OUTLOOK

What will be the status of your hotel in 2021? (Multiple choices)

% of respondents



The moral is up for 2021, hoteliers want to keep their hotel open if no further restriction will apply.

RECOVERY AND FUTURE OUTLOOK

In your opinion, which factors will offer your business a faster recovery period?



Although, the hoteliers are approaching various methods to sustain their business, governmental support is needed.

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