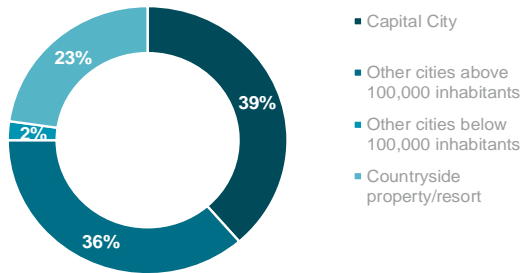




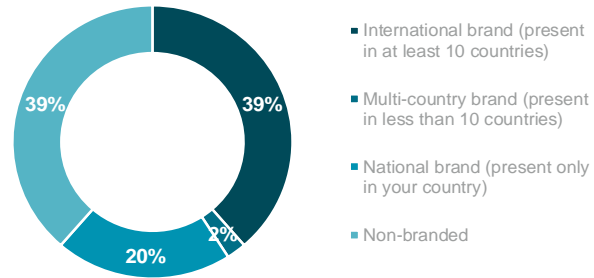
COVID-19 IMPACTS ON HOSPITALITY  
Romania

# Profile of Romania Respondents

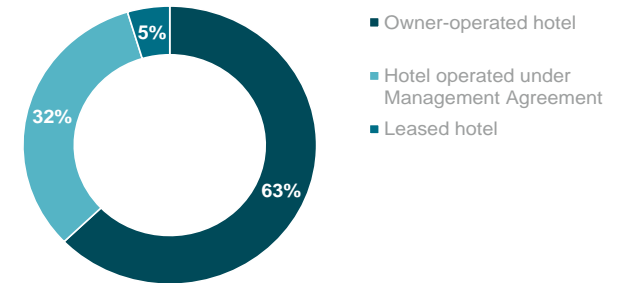
### Location



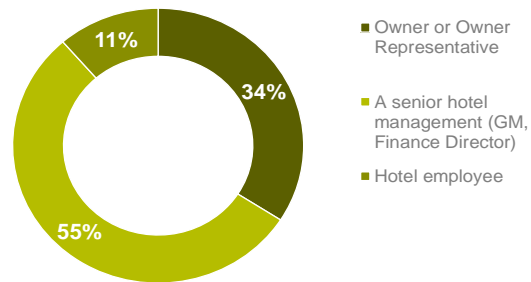
### Branding



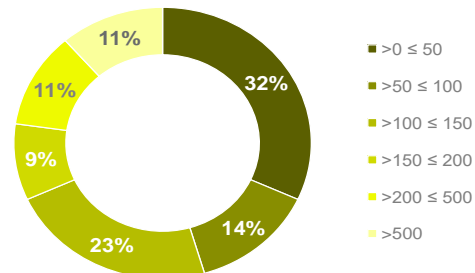
### Operating Structure



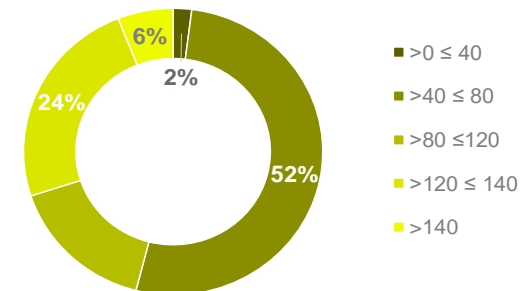
### Respondent Position



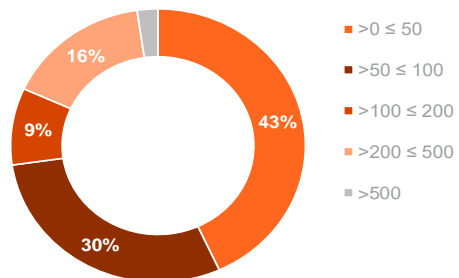
### Hotel Size (Rooms)



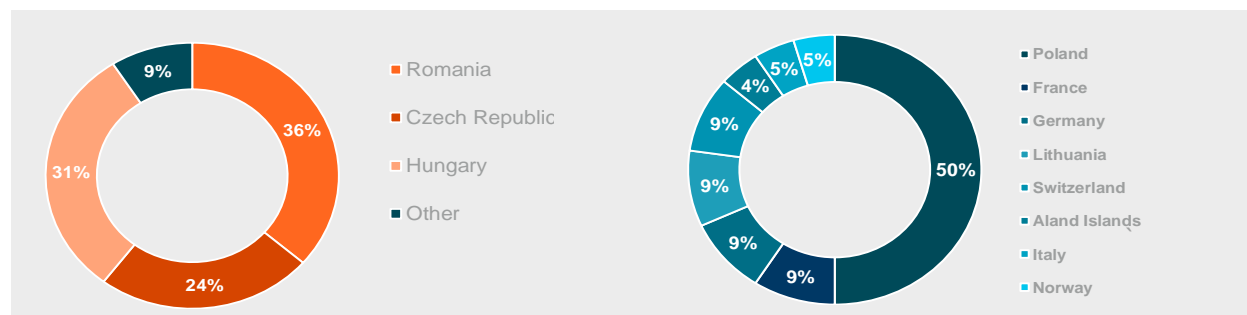
### Average Rate in 2019 (in EUR)



### Headcount Per Property



### Geographical Distribution (all respondents)



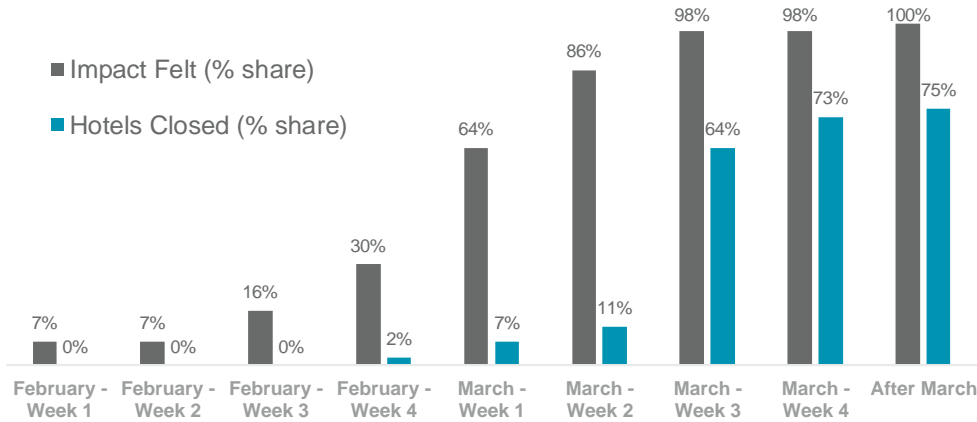
Total respondents 132

Total Romania respondents 44

# COVID-19 Impact : Timeline

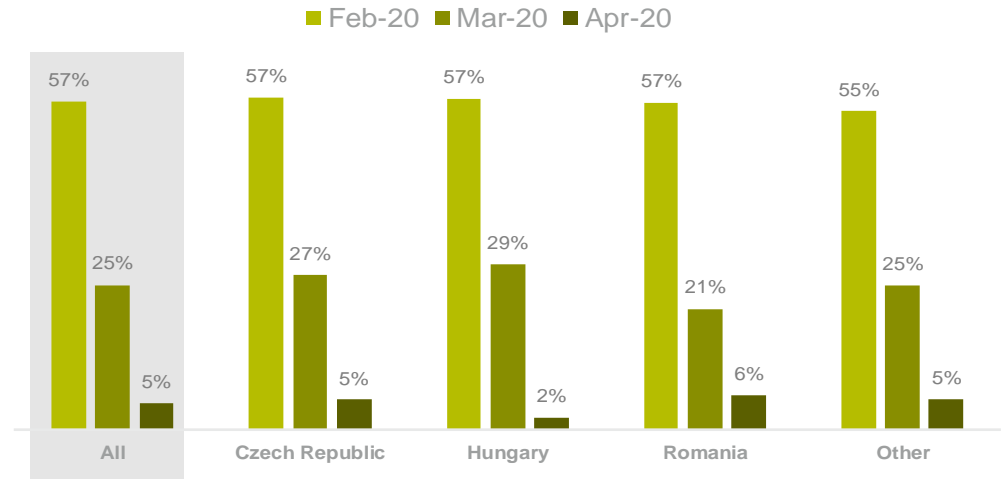
## COVID-19 impact - Timeline (% of Romanian hotels - cumulative)

When did you start to feel the impact of COVID-19 crisis (y-o-y occupancy decline of more than 10%) ?



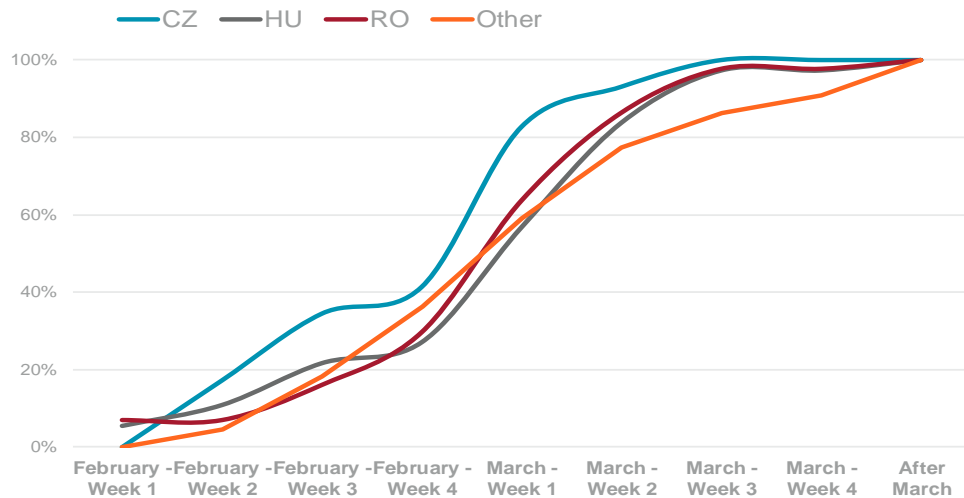
## COVID-19 impact - Occupancy (% average)

What was your average occupancy in Feb/Mar/Apr2020 ?



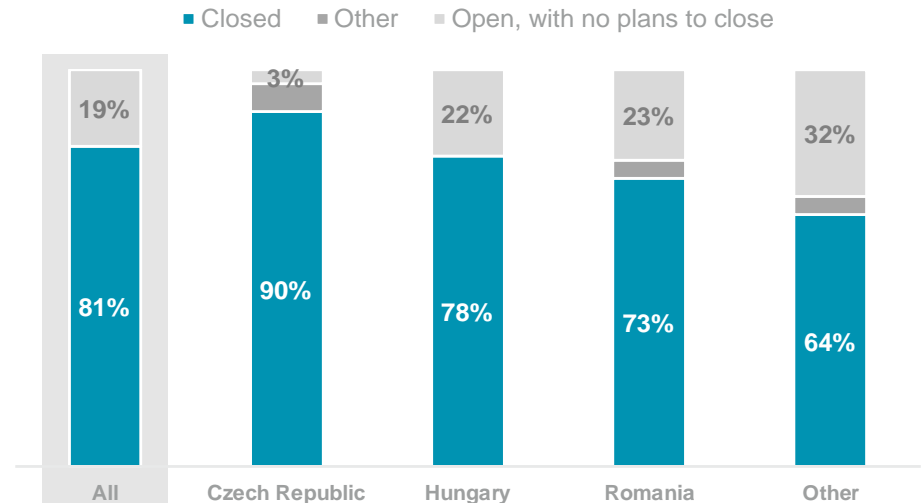
## COVID-19 impact - Timeline Per Country (% of hotels - cumulative)

When did you start to feel the impact of COVID-19 crisis (y-o-y occupancy decline of more than 10%) ?



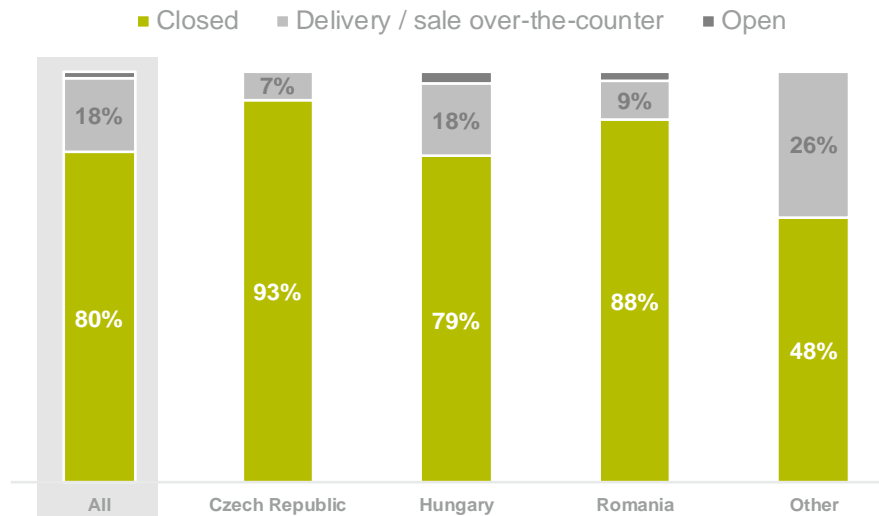
## Hotel closure status\* (% of all respondents)

What is the current status of your hotel ?



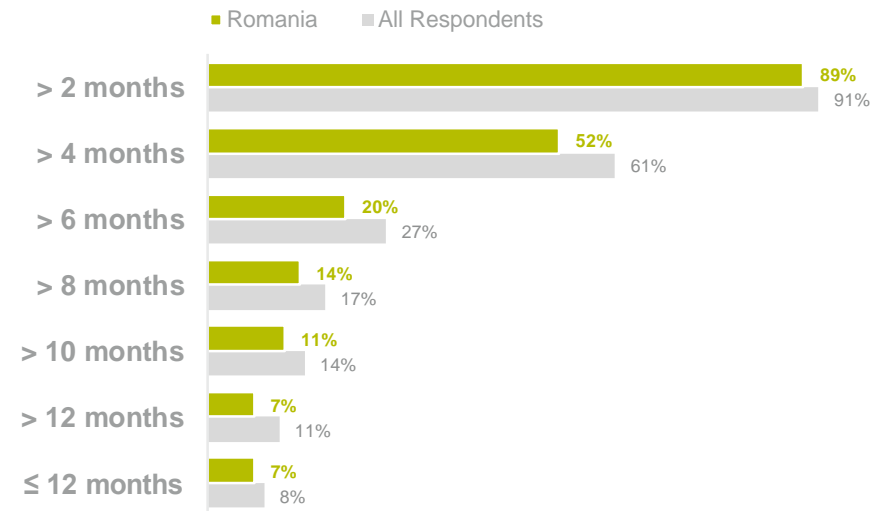
\*(Survey conducted between 23/04 and 24/05)

### F&B outlets closing status per country\* (% of all respondents)



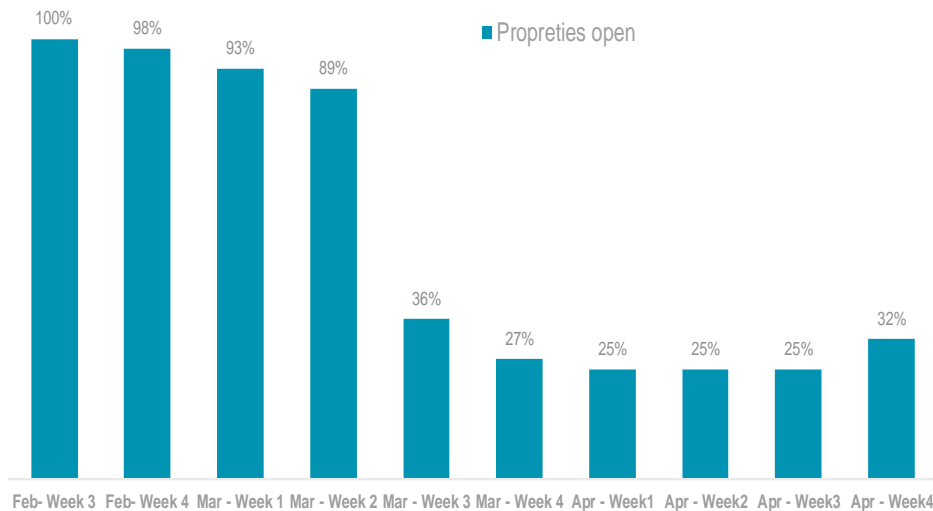
### Hotels ability to survive during COVID-19 crisis (% of Romanian and all respondents)

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



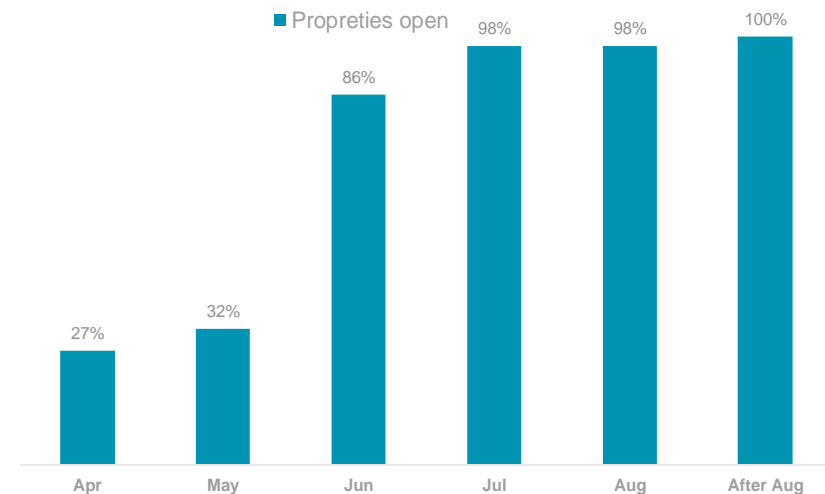
### Hotel closure timeline in Romania (% average)

If your hotel closed during the COVID-19 crisis, when did you close it ?



### Hotel reopening timeline in Romania (% average)

When do you plan to re-open ?

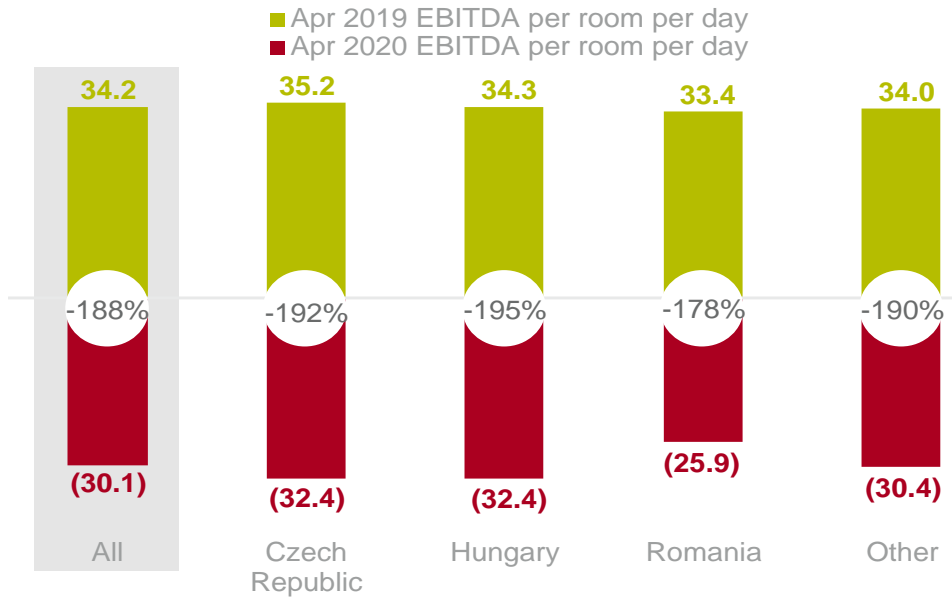


\*(During the period of the survey from 23/04 - 24/05)

# Impact of COVID19 : Financial

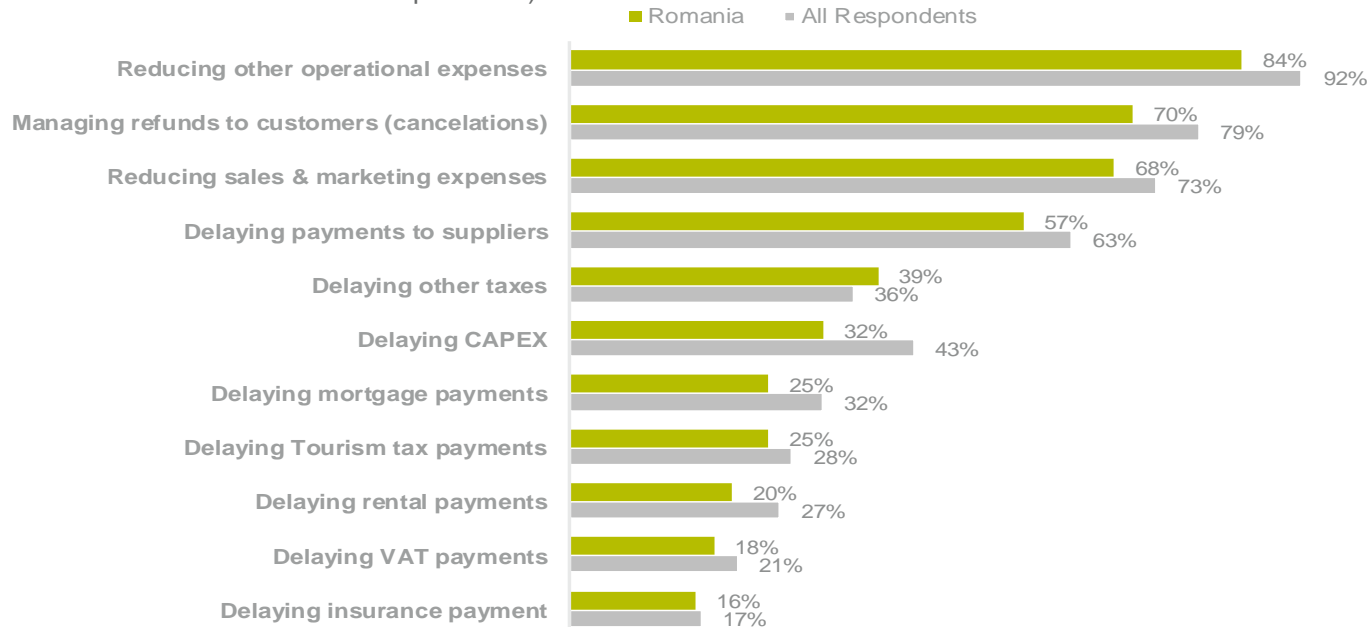
## Change of profitability (% average of all respondents)

What was your net operating income (EBITDA) per room per day in Apr 2019 (last year) and Apr 2020 ?

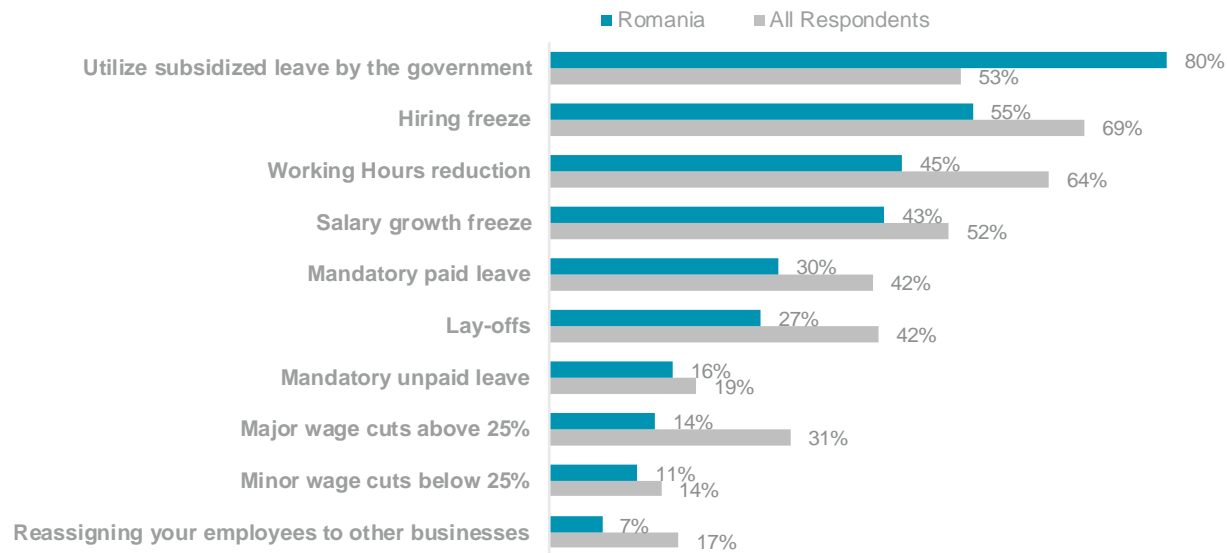


# Hoteliers Actions during COVID-19

What measures have you undertaken to address the COVID-19 crisis?  
(% share of total Romanian and all respondents)



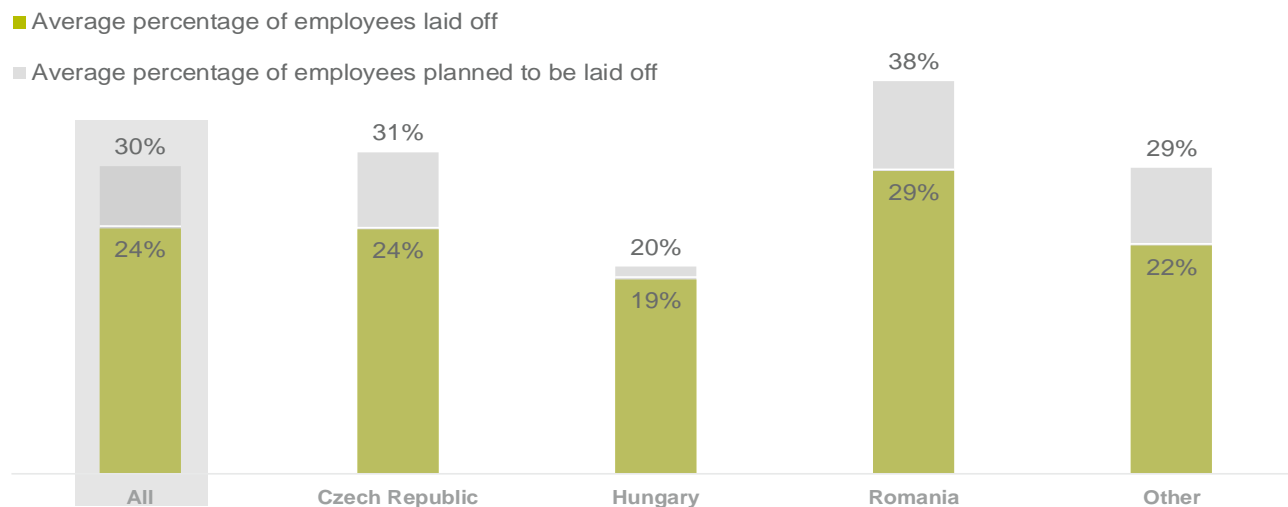
What measures have you undertaken regarding your staff to address the COVID-19 crisis ?  
(% share of total Romanian and all respondents)



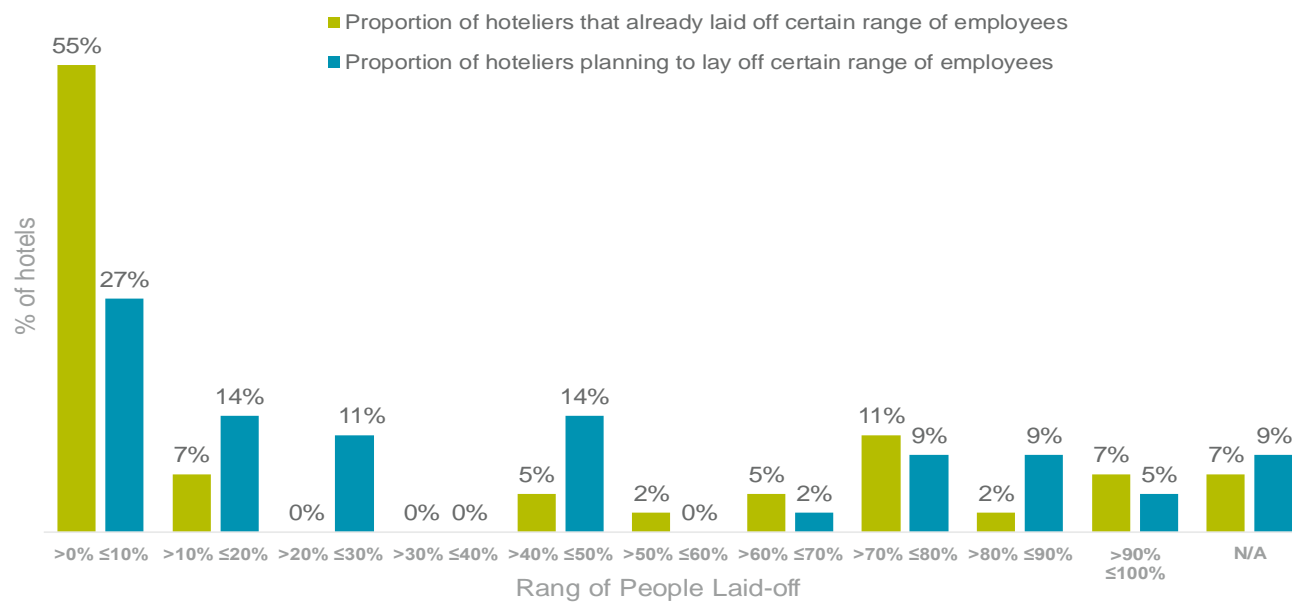
## COVID-19 impact on hotel employment (% share total staff)

How many staff members did you lay off due to COVID-19 crisis so far? (Please provide a percentage of total employees)

How many additional staff members do you expect to further lay-off in coming months? Please provide a total percentage of all employees you expect to lay-off (those already laid-off and planned)



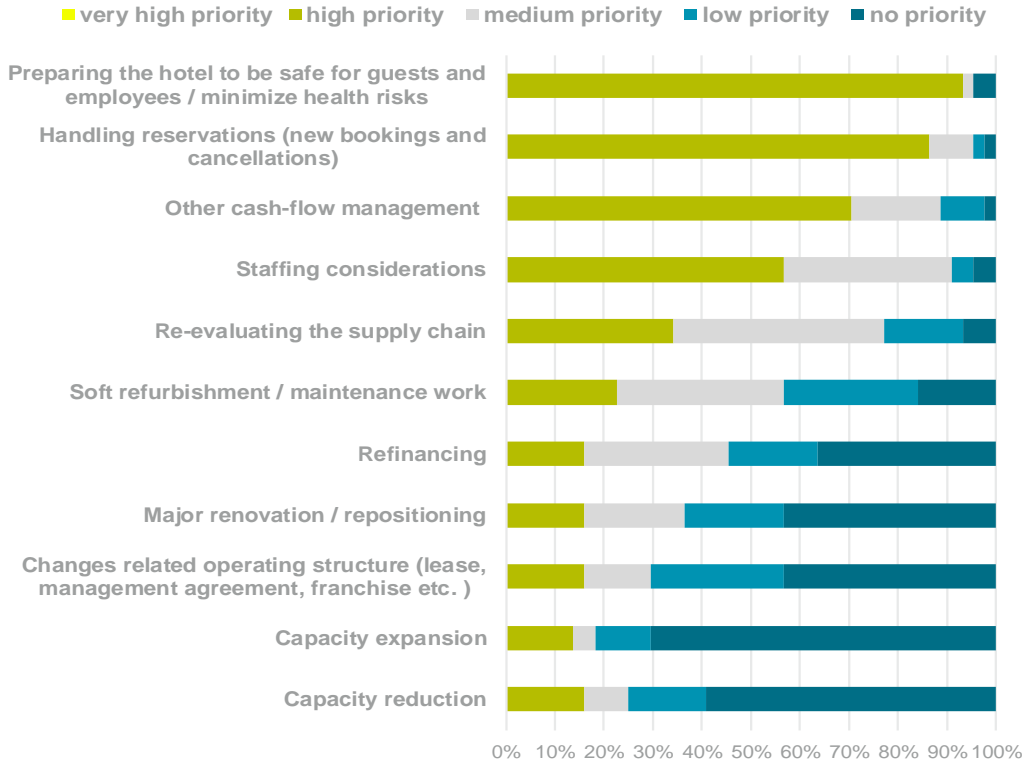
## Distribution of COVID-19 impact on hotel employment in Hungarian hotels (% of Romanian respondents)



# Hoteliers actions to RE-OPEN during COVID-19

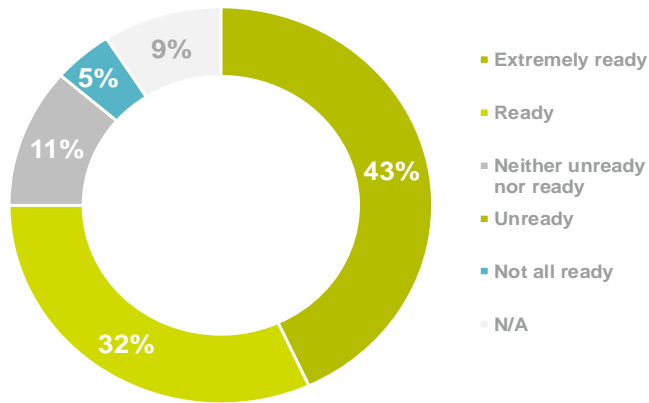


Priority levels during COVID-19 (% total Romanian respondents)

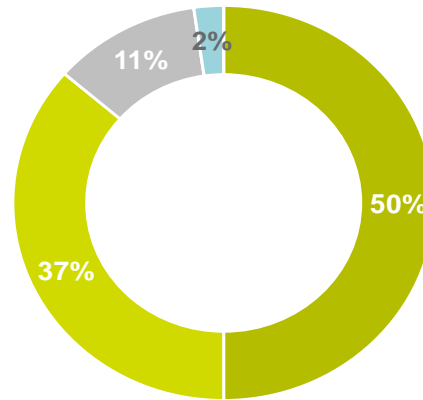




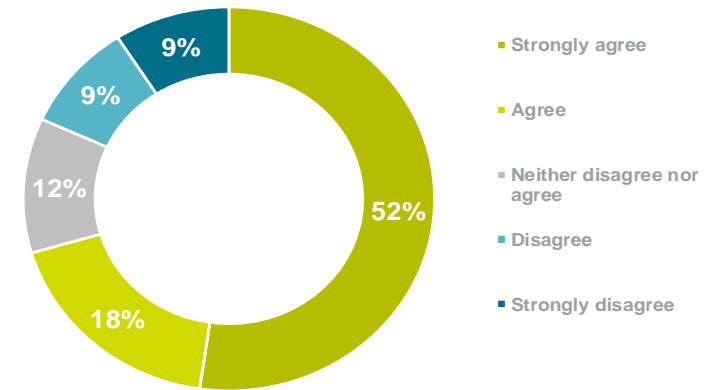
How ready is your property to re-open ?(% of Romanian respondents)



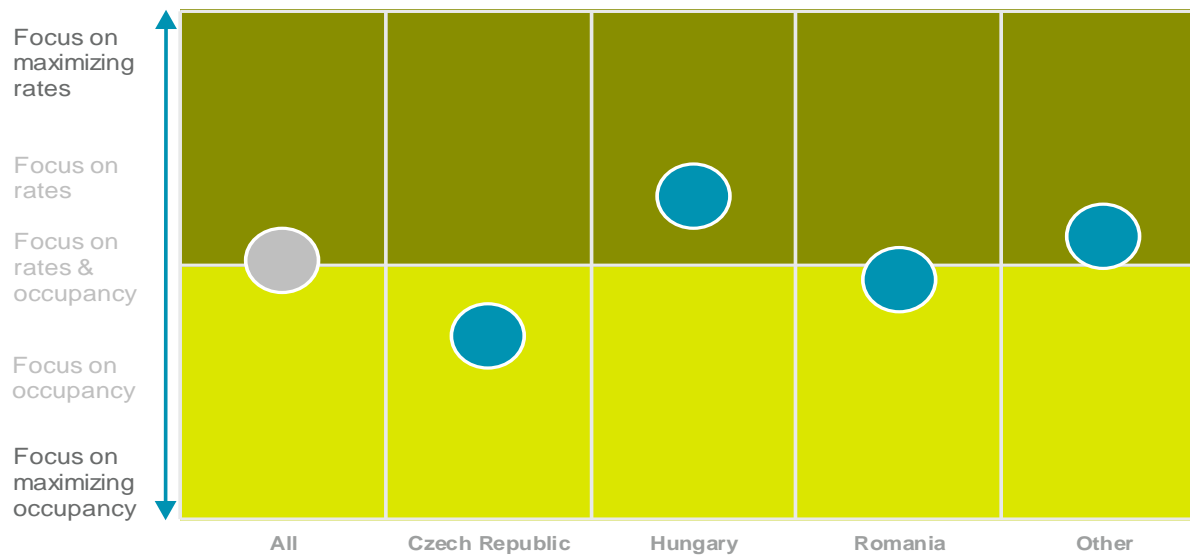
How ready is your property to ensure safety of guests and employees ? (% of Romanian respondents)



Do you think there should be some form of new health and safety standard certification to ensure hotels are safe/clean for guests and employees? (% of Romanian respondents)

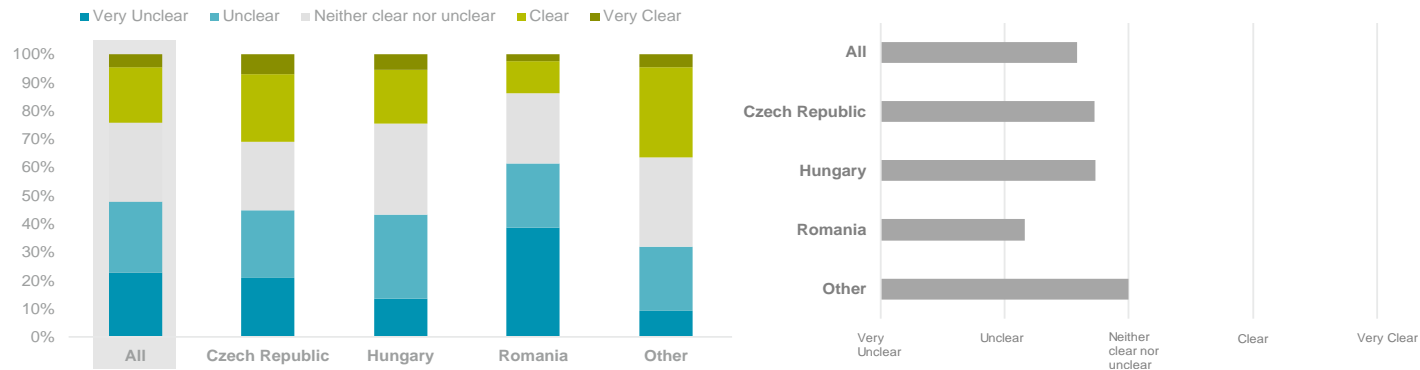


What will be your rate strategy during the recovery stage?

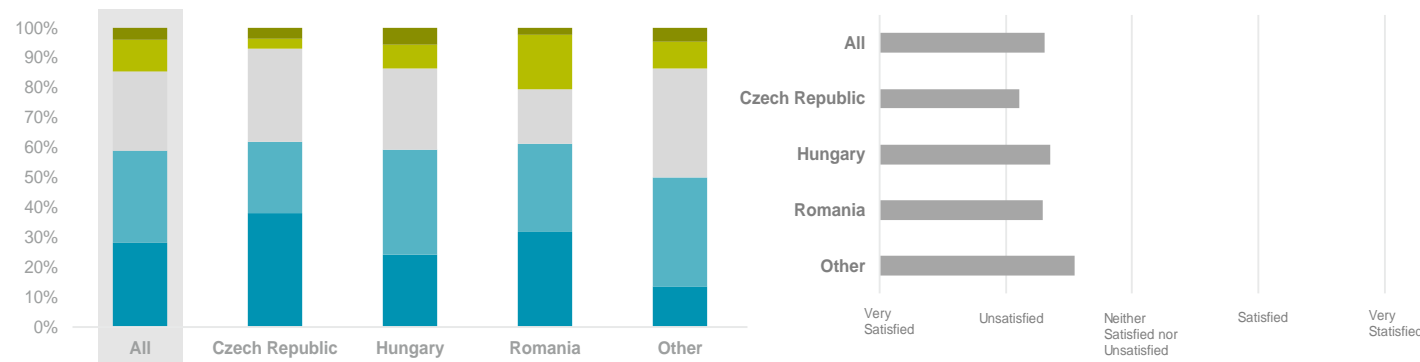


# Governmental Actions during COVID-19

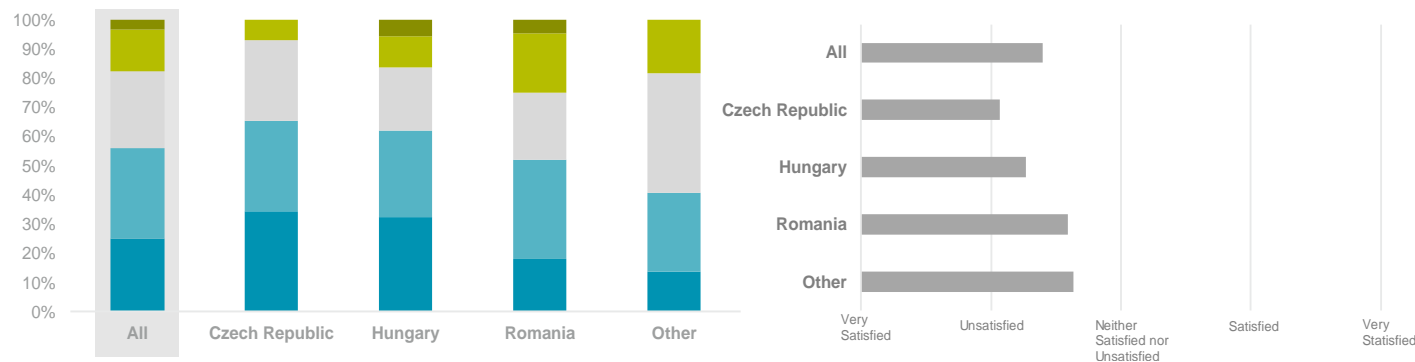
**COMMUNICATION** - How would you rate the quality of communication of your national authorities regarding the restrictions taken and communication regarding measures offered during the COVID-19 crisis ?



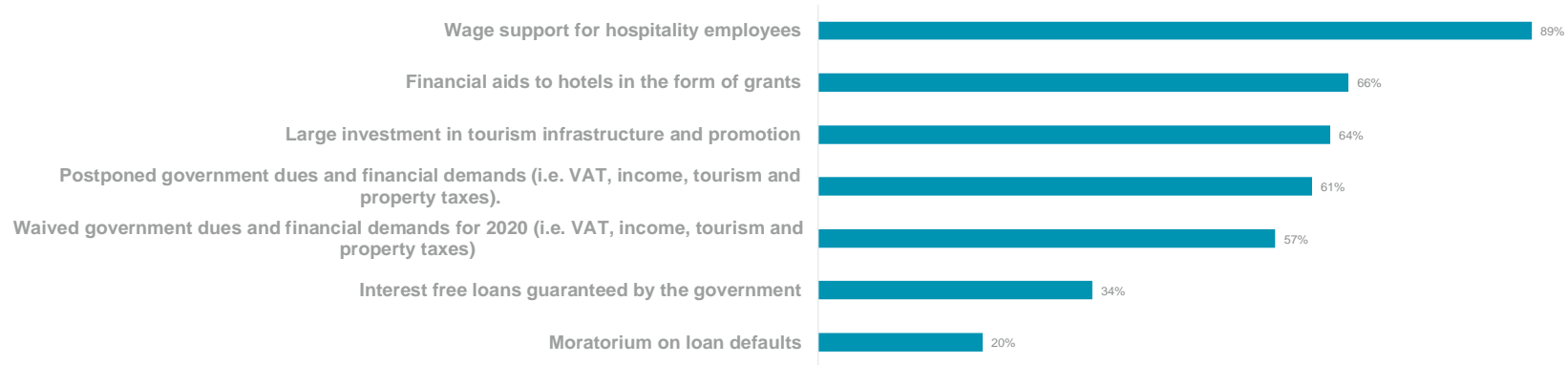
**SATISFACTION** - Are you satisfied with the LEVEL of the support provided by government towards the industry (assuming you can access it) ?



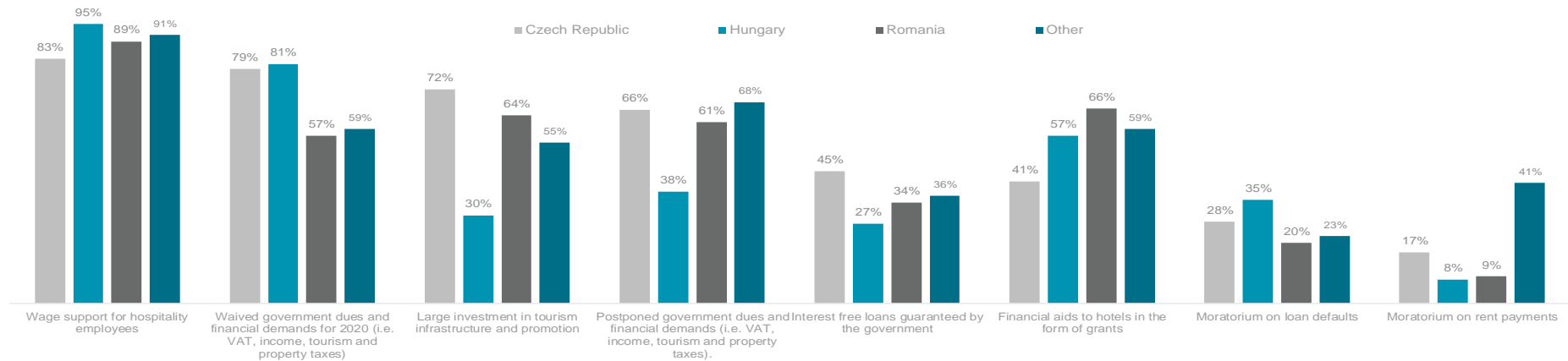
**EASE OF ACCESS** - Are you satisfied with the ACCESSIBILITY of the support provided by government towards the industry (how easy it is to apply and get it) ?



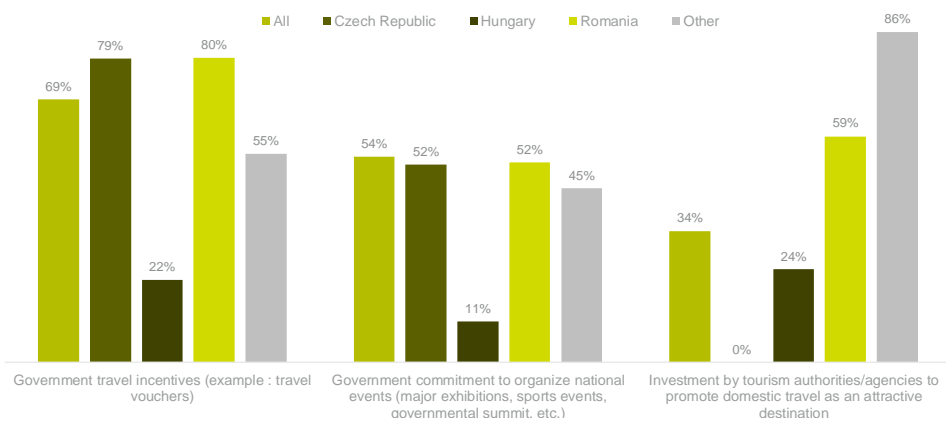
## Support measures demanded by hoteliers (% total Romanian respondents)



## Support measures demanded by hoteliers per country (% of all respondents)



## Tourism specific measures demanded hoteliers per country (% of all respondents)



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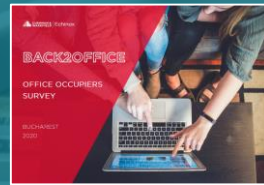
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