

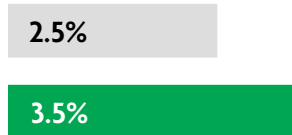
UKRAINE

2020 ANNUAL RESEARCH: KEY HIGHLIGHTS¹

GLOBAL DATA 2019



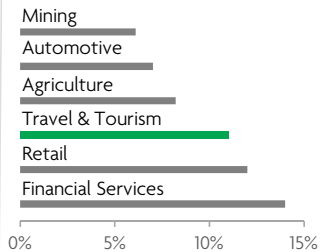
While the global economy grew by 2.5%,
Travel & Tourism grew significantly more at 3.5%



1 in 4 net new jobs were created by Travel & Tourism over the last five years



Global GDP impact by sector (2018 data). Share of total economy GDP



UKRAINE 2019 KEY DATA



CONTRIBUTION OF TRAVEL & TOURISM TO GDP

5.9% OF TOTAL ECONOMY

Total T&T GDP = UAH229.4BN (USD8,687.5MN)

+6.1%

2019 Travel & Tourism GDP growth vs **+3.5%** real economy GDP growth



CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

1,028.8 JOBS (000's)
(6.2% of total employment)



INTERNATIONAL VISITOR IMPACT

UAH59.5_{BN}

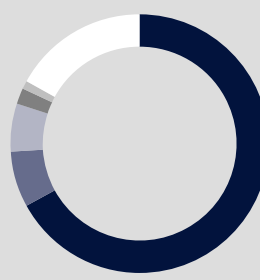
in visitor spend (**3.3%** of total exports)
(USD2,251.8MN)

INBOUND ARRIVALS



- 1. MOLDOVA **32%**
- 2. BELARUS **17%**
- 3. RUSSIAN FEDERATION **11%**
- 4. POLAND **8%**
- 5. HUNGARY **8%**
- REST OF WORLD **24%**

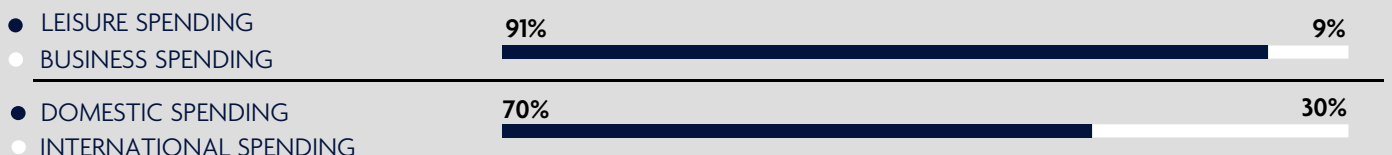
OUTBOUND DEPARTURES



- 1. RUSSIAN FEDERATION **67%**
- 2. TURKEY **7%**
- 3. POLAND **6%**
- 4. BULGARIA **2%**
- 5. HUNGARY **1%**
- REST OF WORLD **17%**

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)



¹All values are in constant 2019 prices & exchange rates
As reported in March 2020