UKRAINE
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS¹

GLOBAL DATA 2019

10.3% Total GDP contribution

330 MN Jobs globally (1 in 10 jobs)

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

- Mining
- Automotive
- Agriculture
- Travel & Tourism
- Retail
- Financial Services

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of Total Economy GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>10%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>10%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

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)

- LEISURE SPENDING 91%
- BUSINESS SPENDING 9%
- DOMESTIC SPENDING 70%
- INTERNATIONAL SPENDING 30%

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