Global and regional market overview – what are the demand patterns and statistics telling us?



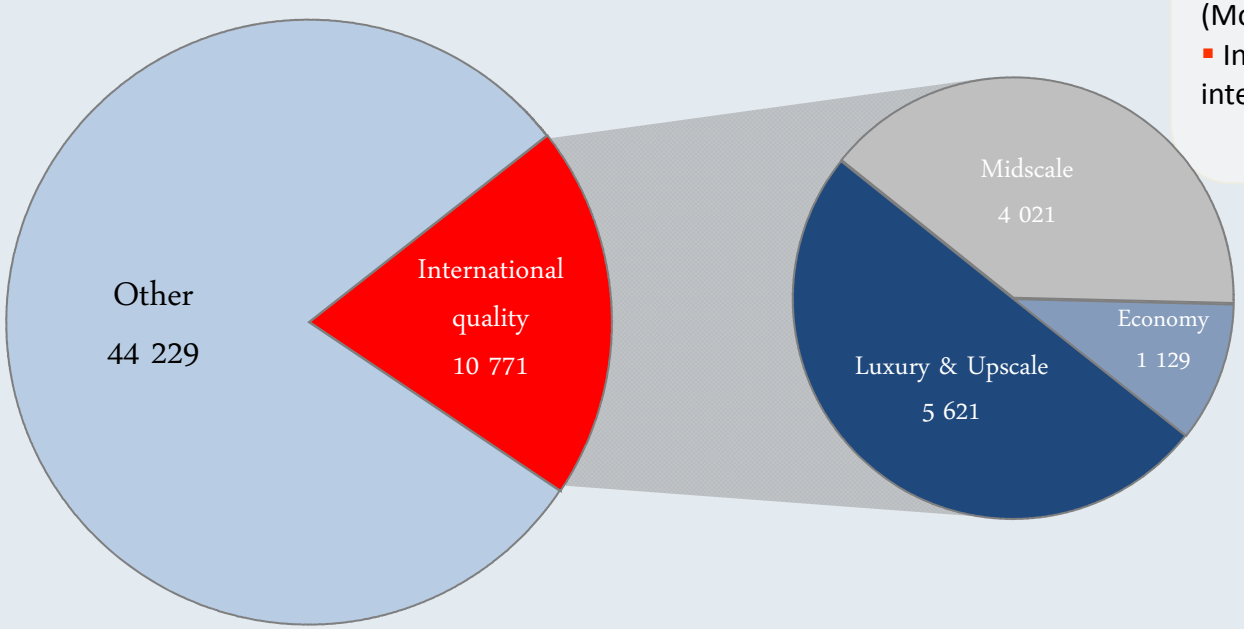
David Jenkins

Head of Hospitality Russia & CIS

Cushman & Wakefield

Moscow Hotel Room Supply

International Quality vs Other Hotel Roomstock



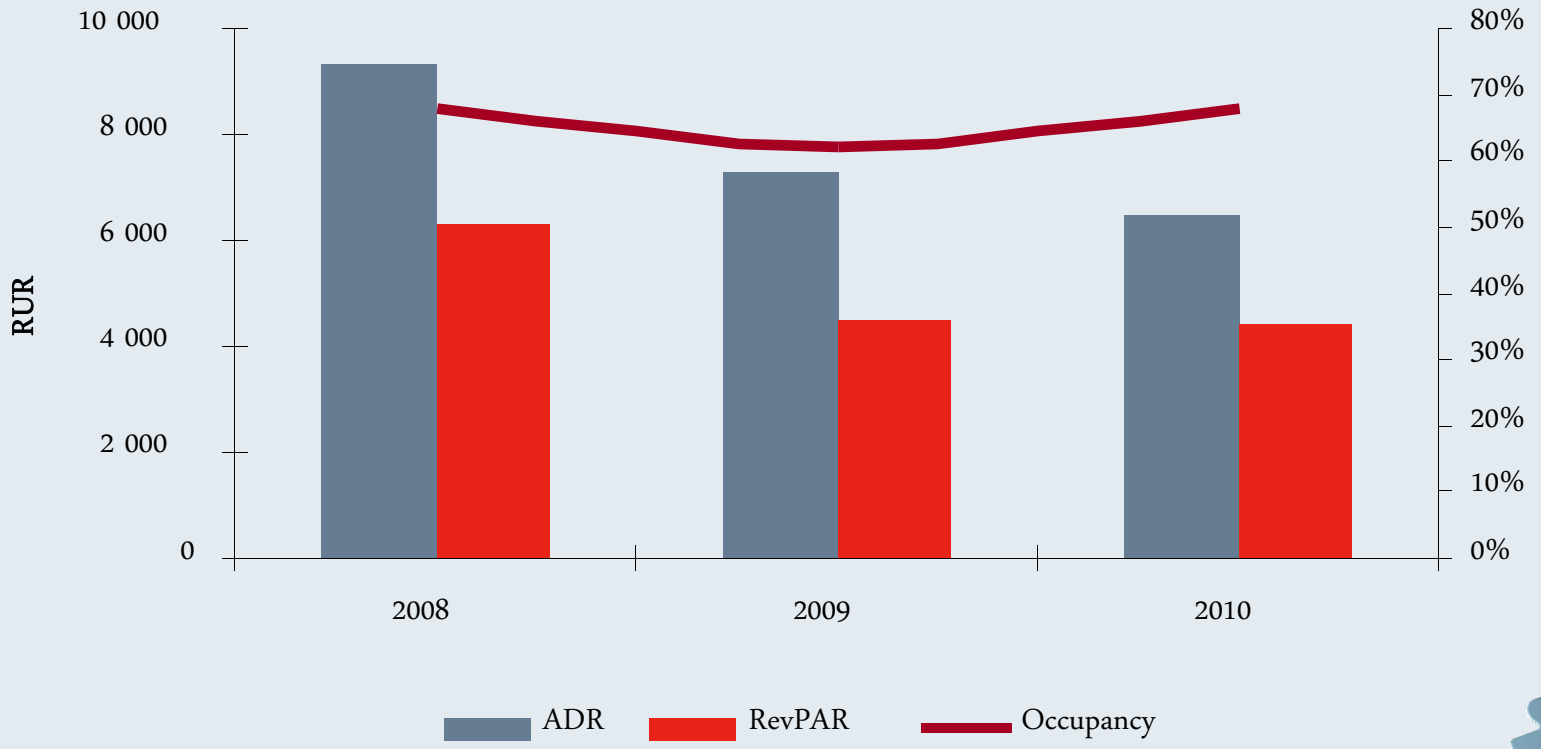
Moscow Hotels at a Glance

- Around 267 hotels for approx. 55,000 rooms, as of January 1, 2010 (Moscow City Government)
- In our view, 45 hotels are of international quality

Source: Moscow City Government, C&W Hospitality Research

Moscow Hotel Operating Performance 3Q 2010 YOY

Weighted Averages for Moscow International Quality Hotels



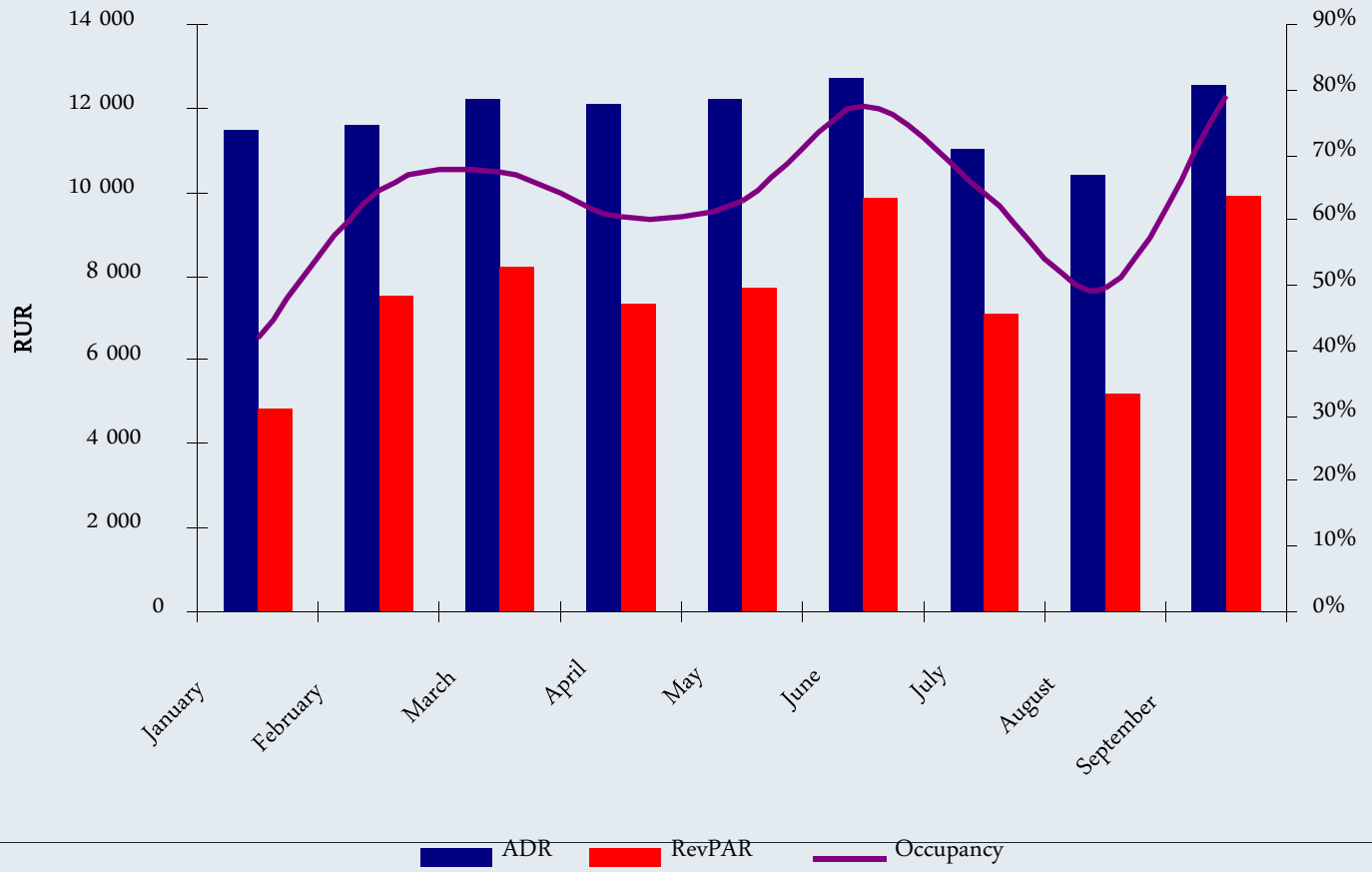
C&W Hospitality Research

Partnership for Success

Moscow Hotels Performance, Rolling-9 operating results, 2010



9 Months Luxury Segment Operating Results, 2010

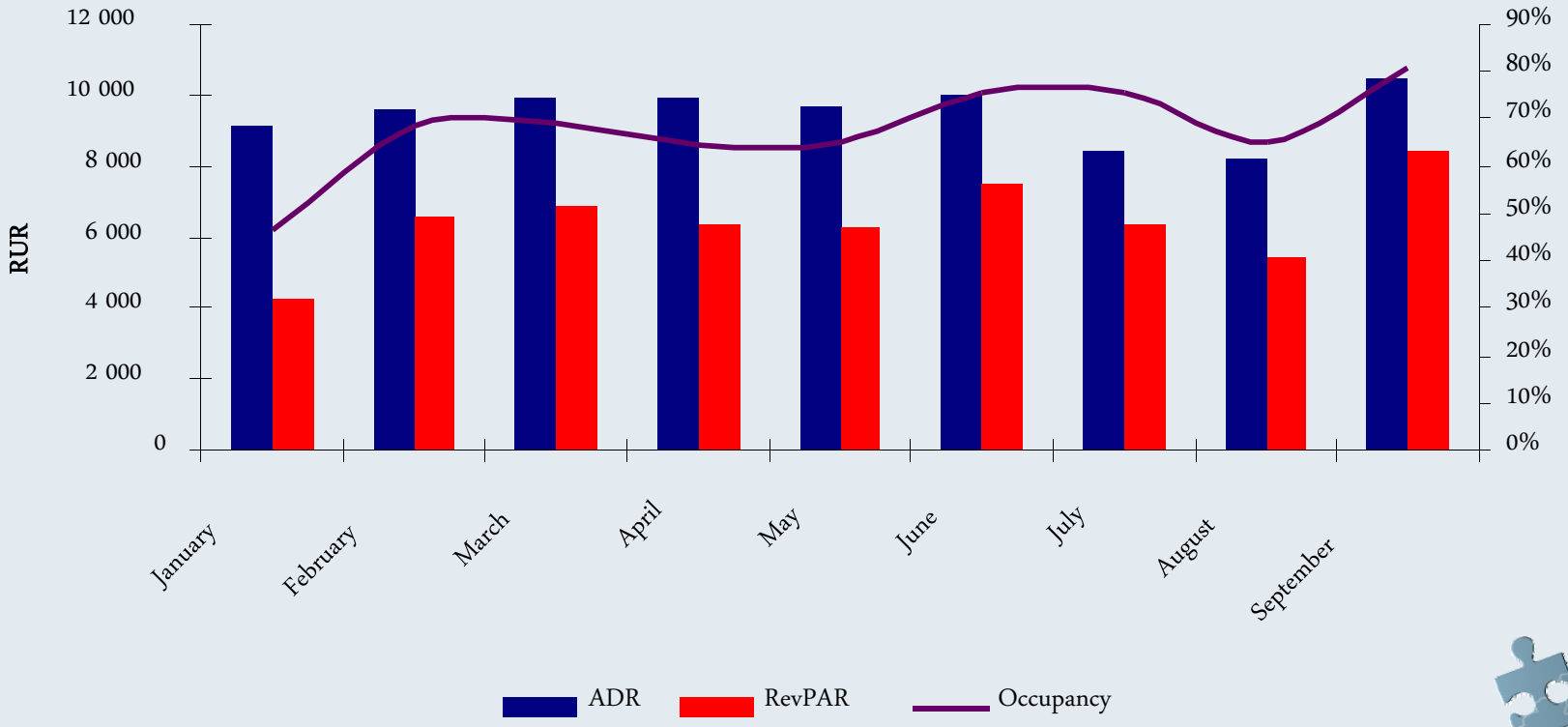


Source: STR Global, C&W Hospitality Research



Moscow Hotels Performance, Rolling-9 operating results, 2010

9 Months Upper Upscale Segment Operating Results, 2010

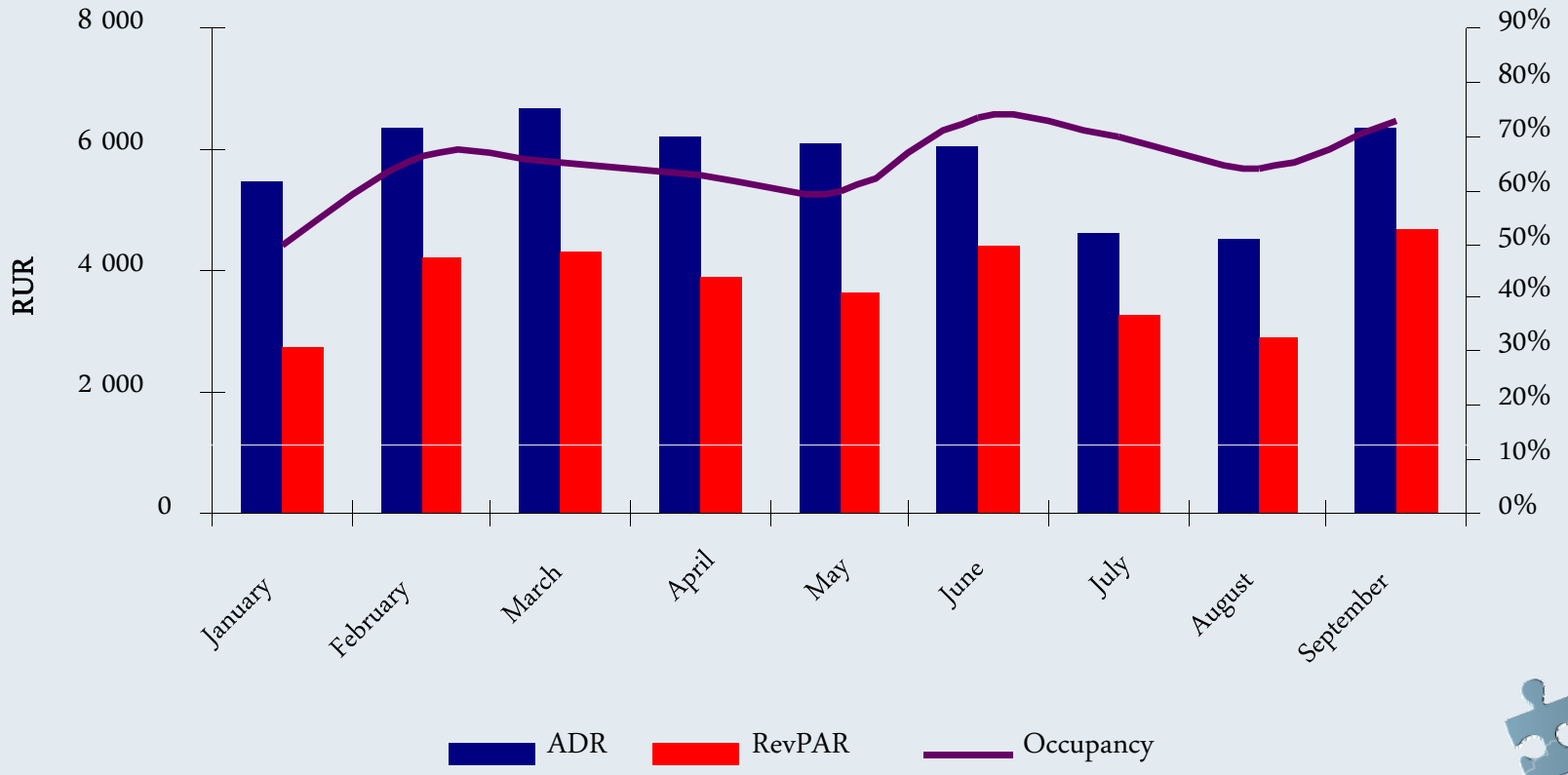


Source: STR Global, C&W Hospitality Research

Moscow Hotels Performance, Rolling-9 operating results, 2010



9 Months Upscale Segment Operating Results, 2010



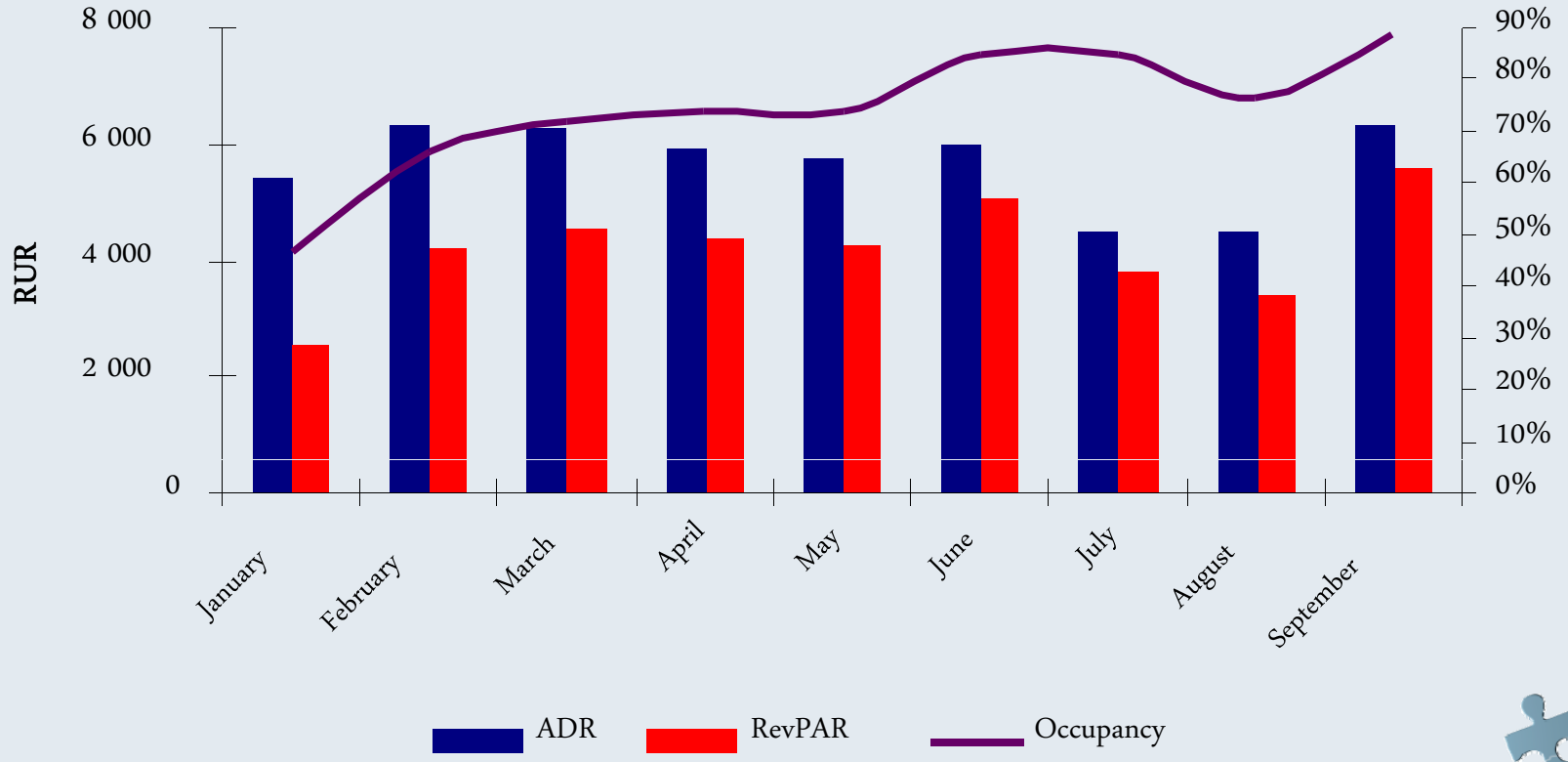


Source: STR Global, C&W Hospitality Research

Moscow Hotels Performance, Rolling-9 operating results, 2010



9 Months Upper Midscale Segment Operating Results, 2010

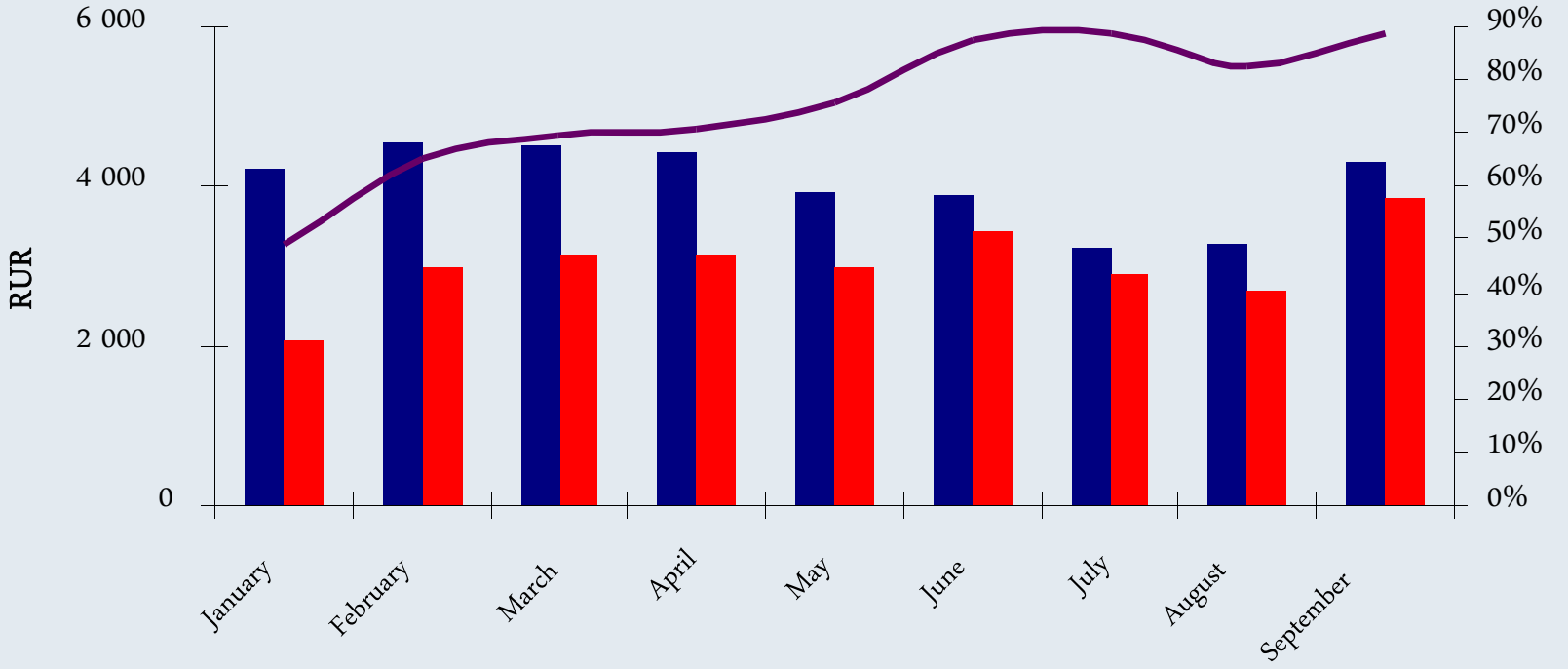




Source: STR Global, C&W Hospitality Research

Moscow Hotels Performance, Rolling-9 operating results, 2010



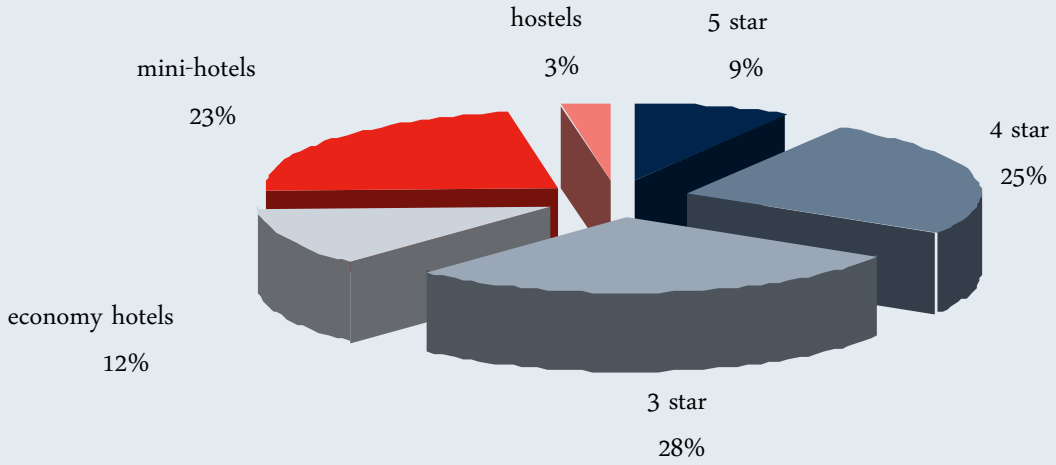




Source: STR Global

St. Petersburg Hotel Market

St. Petersburg Hotel Roomstock by Segments



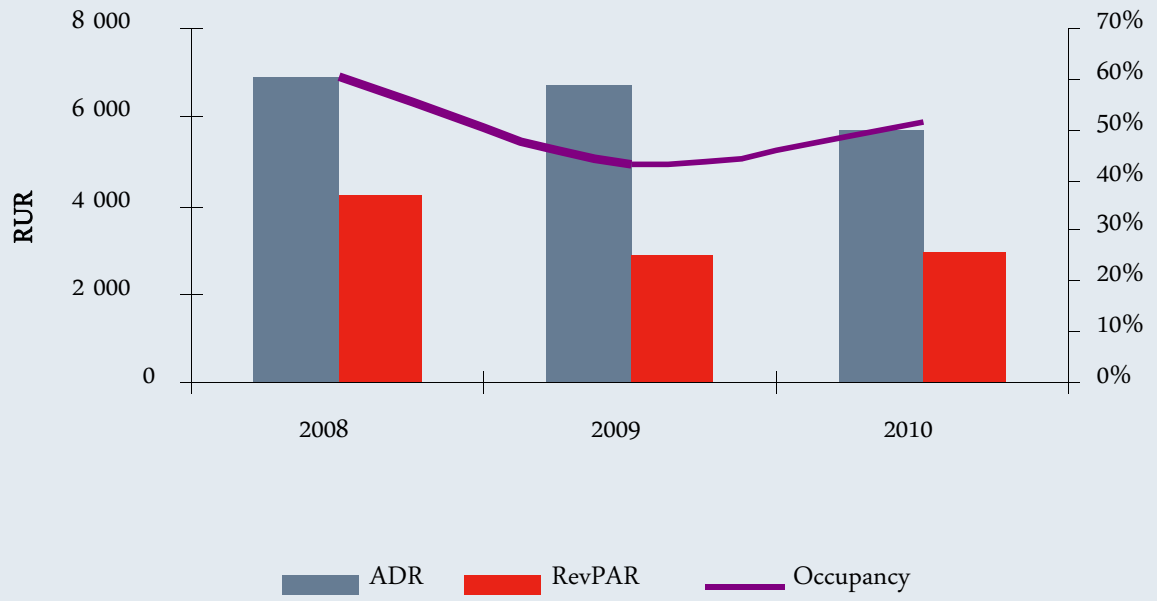
St. Petersburg Hotels at a Glance

- 622 hotels for over 26,000 rooms:
  - 5 star – 12 hotels;
  - 4 star – 32 hotels;
  - 3 star – 51 hotels;
  - economy – 34 hotels;
  - mini-hotels – 455 properties;
  - hostels – 38 properties.

Source: St. Petersburg Committee for Investment & Strategic Projects

St. Petersburg Hotel Operating Performance 3Q 2010 YOY

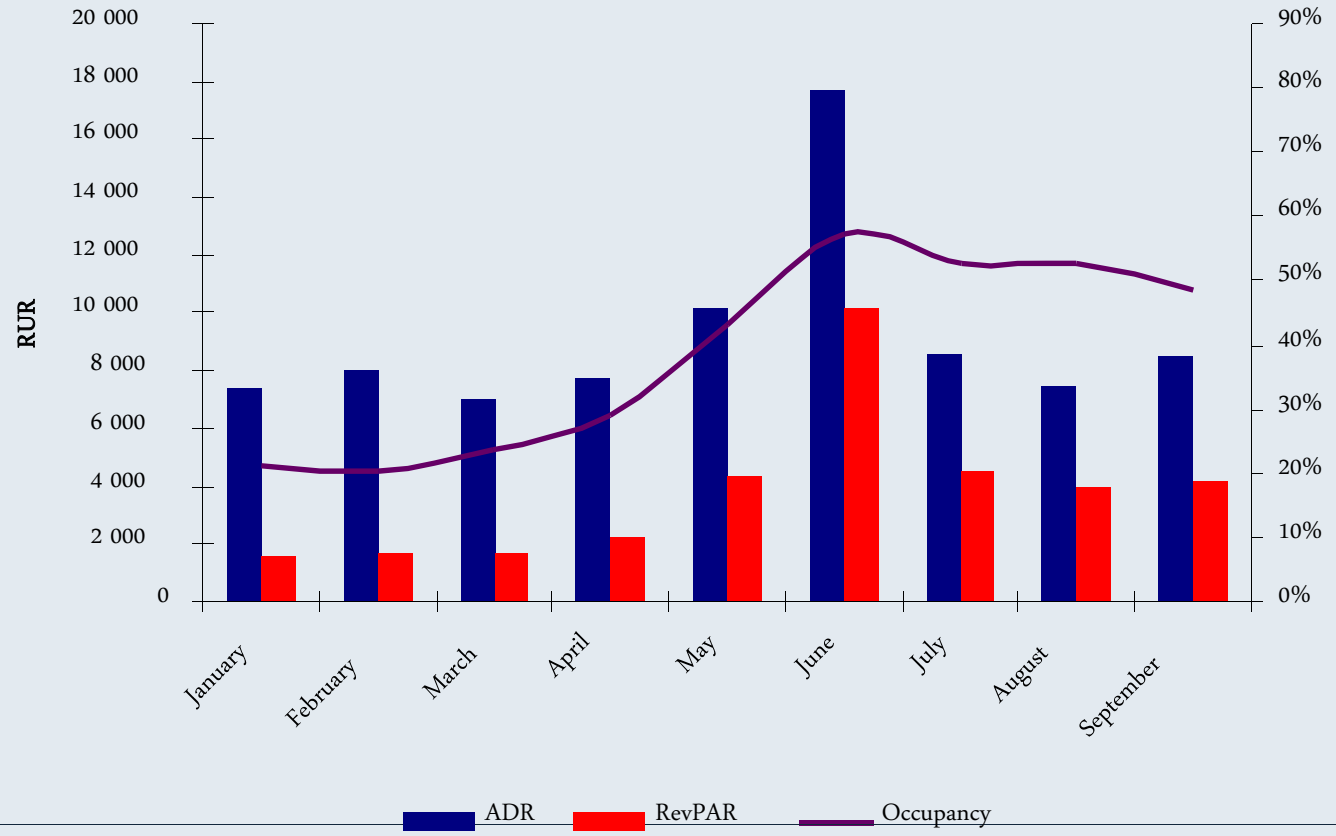
Weighted Averages for St. Petersburg International Quality Hotels



C&W Hospitality Research

St. Petersburg Hotels Performance, Rolling-9 operating results, 2010

9 Months Luxury/ Upper Upscale Segment Operating Results, 2010

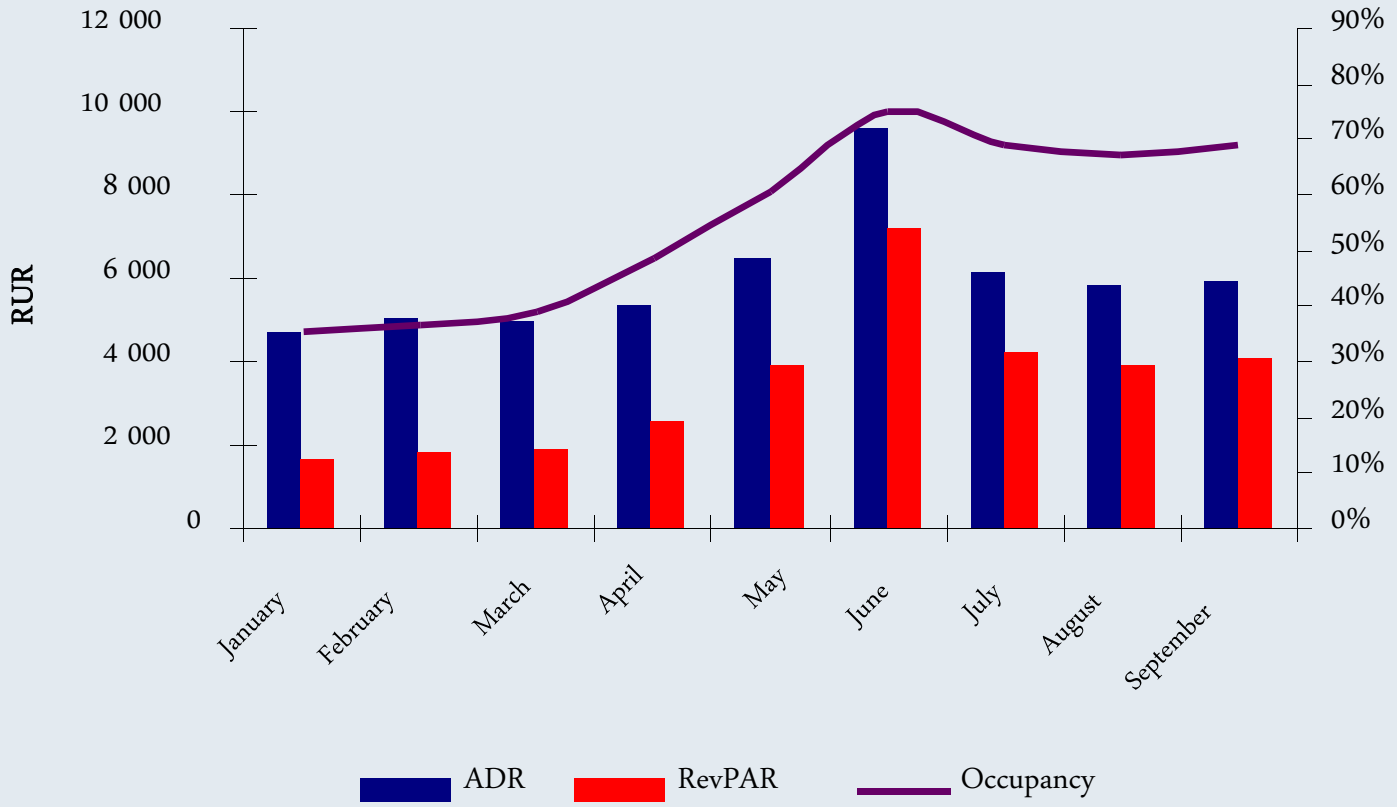


Source: STR Global, C&W Hospitality Research

St. Petersburg Hotels Performance, Rolling-9 operating results, 2010



9 Months Upscale Segment Operating Results, 2010



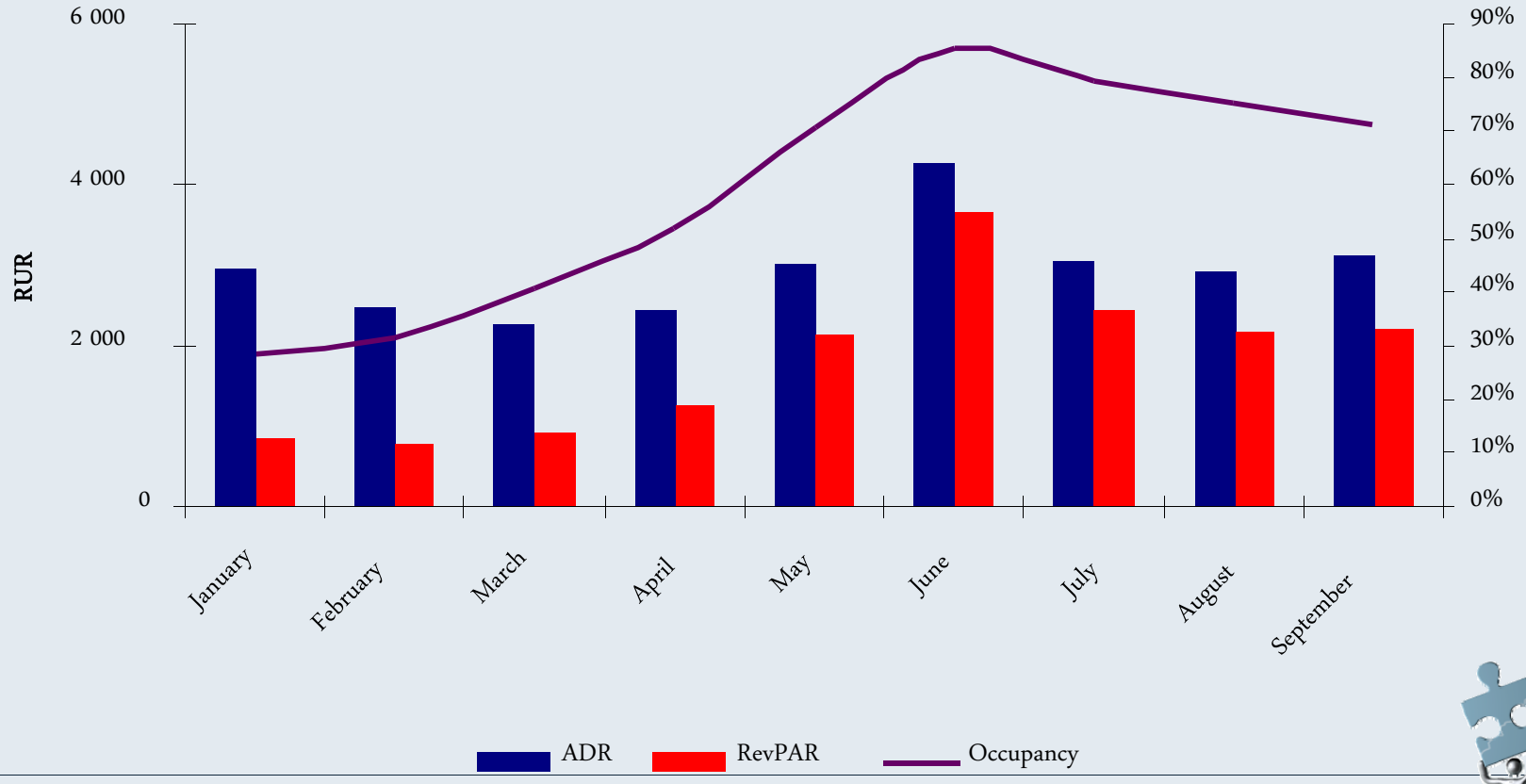


Source: STR Global, C&W Hospitality Research

St. Petersburg Hotels Performance, Rolling-9 operating results, 2010



9 Months Midscale Segment Operating Results, 2010





Source: STR Global, C&W Hospitality Research