HTLroundtable switzerland+	switzerland+	online (19.01.2021)	31 participants

supply

229 properties; 36,234 rooms[1]

BRANDED ROOMS

68%

CHAIN AFFILIATED ROOMS

78%

GROUP / BRAND PROFILE

- strongest brand: Ibis
- strongest group: Accor
- fastest growing brand: Prizeotel
- fastest growing group: Jin Jiang
- strongest regional brand (global presence): Kempinski

pipeline

55 properties; 8,995 rooms[1,2]

30 HOTELS UNDER CONSTRUCTION

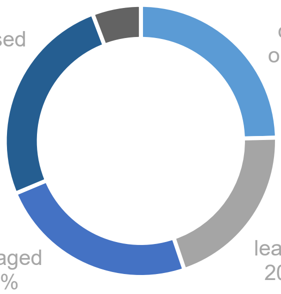
25 PLANNED HOTELS

SELECTED OPENINGS of 2020

- Prizeotel Bern-City, Bern, 188 rooms
- CitizenM Geneva, Geneva, 144 rooms
- Moxy Bern Expo, Bern, 130 rooms
- Leonardo Zurich Airport, Kloten, 116 rooms

hotel contracts

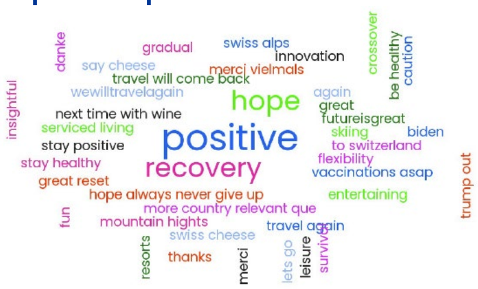
130 properties; 21,907 rooms under contract[2,3,4]



key takeaways

- Switzerland is keeping its hotels open despite almost no international travelers. Resort destinations like the Bernese Oberland and Zermatt had rather high occupancy levels over the summer and in December, but cities are struggling.
- The luxury and upper upscale segment had the strongest occupancy decline but maintained or even increased their rates. The opposite held true for the other segments.
- More serviced apartments and co-living spaces are being built and are expected to perform well in the future, following an international trend, as they provide more flexibility for tomorrows customers than standard hotels.
- In this context, "experience" was voted to be the most important booking reason in the PKF sentiment survey, followed by "location", "flexibility" and "hygiene".
- Given the decline of international guests due to corona, there have been opportunities for local brands to gain market share compared to internationally recognized brands.

participant feedback



HTLroundtables around the globe

learn more and find the HTLroundtables schedule at

www.pkfhotels.com

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NOTES:

1) calculated as per PKF sample; includes all properties with at least 100 rooms; 2) as per 31 December 2020;
3) as per the PKF contract database 4) from the viewpoint of hotel groups