

Hotel Sector

Key Stats (India Average)

	June 2020	M-o-M (%)	Y-o-Y (%)
ADR	₹3,140.7	-6.3	-40.8
Occupancy	20.8%	45.4	-67.1
RevPAR	₹652.9	35.7	-80.5

June 2020 data for open hotels

Occupancy Change¹

India & Other Key Asian Markets

Singapore	-11.3%
China	-29.4%
India	-67.1%
Thailand	-69.6%
Malaysia	-74.4%

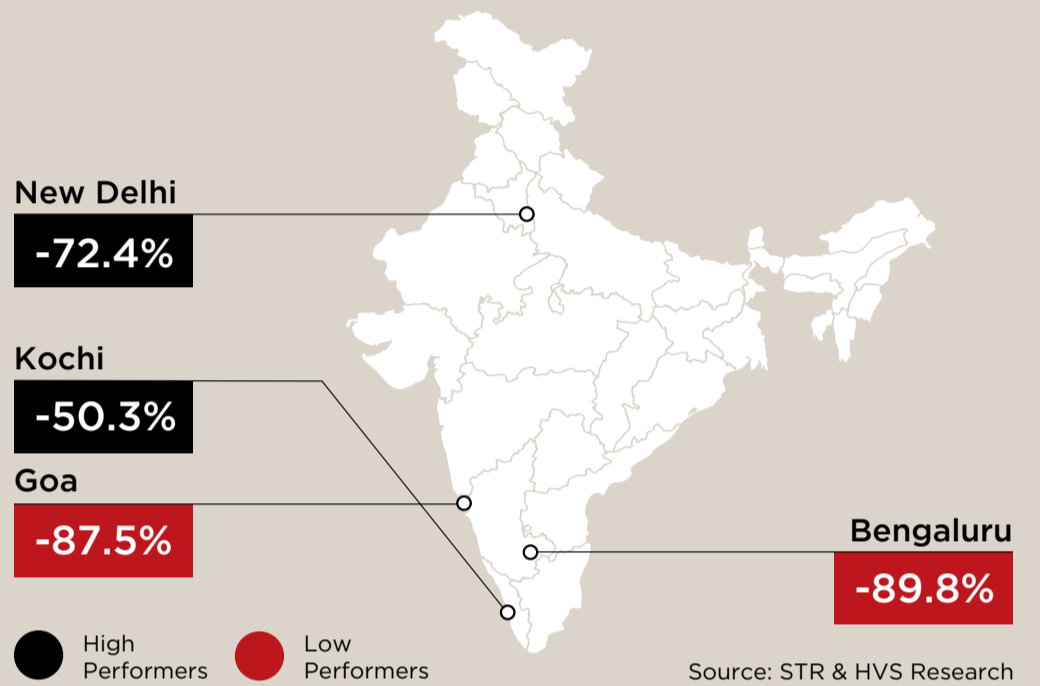
¹ Occupancy % change June 2020 vs June 2019

Key Highlights

- As part of the second phase of its calibrated exit from the lockdown, the **Gol removed interstate & intrastate movement restrictions from 1st July 2020**. As a result, most states have reopened or are planning to reopen their tourism sectors.
- India has established special bilateral arrangement or 'air bubbles' with the US, France and Germany** as it gradually resumes scheduled international flights for the first time since they were stopped in March 2020. Travel under these air bubbles will be regulated as per the entry requirements of each country, including India. As of now, entry is restricted to Indian nationals, Overseas Citizen of India (OCI) card holders and some foreigners such as Diplomats.
- Similar arrangements with the UK and other countries are expected to be announced soon.**

Top 2 High & Low Performing Markets

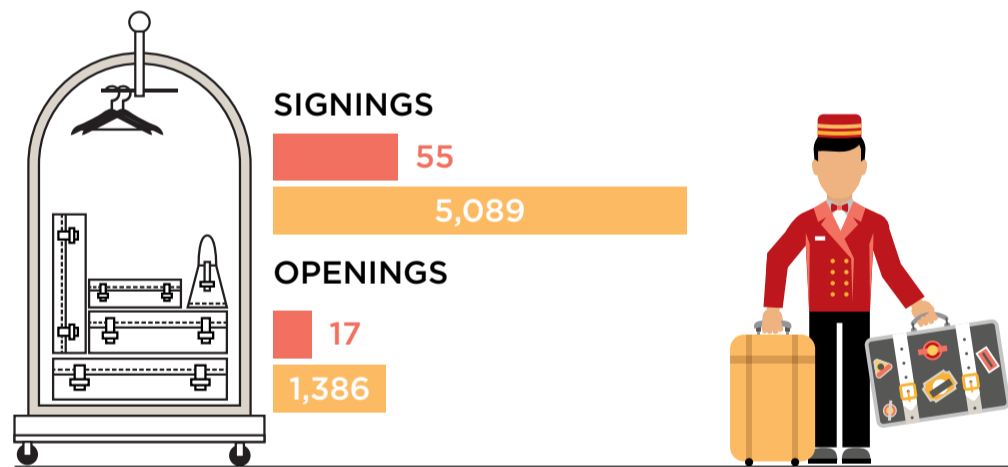
RevPAR (Y-o-Y)



Branded Hotels²

Openings & Signings in 1H 2020

By Keys By Properties



² Data collated by HVS from 22 hotel companies as of 23rd July 2020 for the period January-June 2020

Source: HVS Research

Share Price Movement³

Company	Market Cap (₹ Cr)	Previous Close (₹)	52-week High (₹)	52-week Low (₹)
IHCL	9,466.5	79.8	162.9	62.1
EIH	3,669.4	63.6	188.0	54.7
Chalet Hotels	2,703.2	131.3	395.0	99.0
Lemon Tree Hotels	1,861.8	23.8	70.6	13.8
Mahindra Holidays & Resorts	2,270.4	167.9	252.4	122.0

³ Data as on 1st July 2020
Company names have been abbreviated

Source: BSE

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Mandeep S. Lamba
President (South Asia)
mlamba@hvs.com
+91 98113 06161



Ajay Mehtani
Sr. VP (South Asia)
amehtani@hvs.com
+91 98110 54921



Akash Datta
Sr. VP (South Asia)
adatta@hvs.com
+91 98995 17404