

## Hotel Sector

Key Stats (India Average)



ADR

₹3,200 - ₹3,800

↑ 5-8%



Occupancy

20% - 25%

↓ 1-2%



RevPAR

₹640 - ₹950

↑ 4-7%

Y-o-Y (%)

AUG 2020

JUL 2020

JUN 2020

MAY 2020

ADR

↓ 29-32%

↓ 36-39%

↓ 39-42%

↓ 36-39%

Occupancy

↓ 60-63%

↓ 62-65%

↓ 66-69%

↓ 75-78%

RevPAR

↓ 72-75%

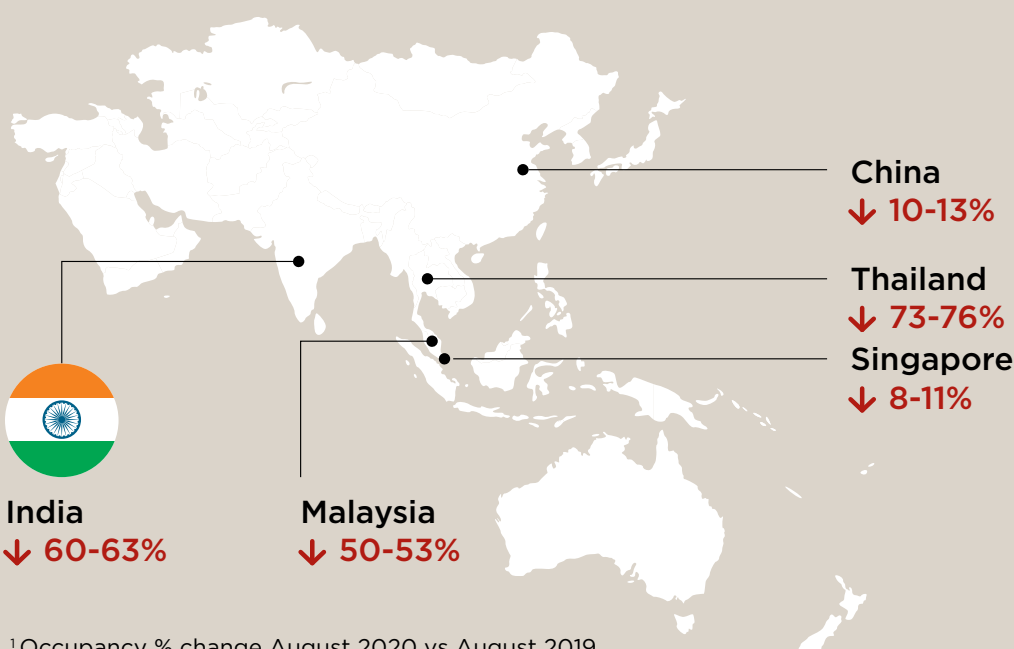
↓ 76-79%

↓ 79-82%

↓ 84-87%

## Occupancy Change<sup>1</sup>

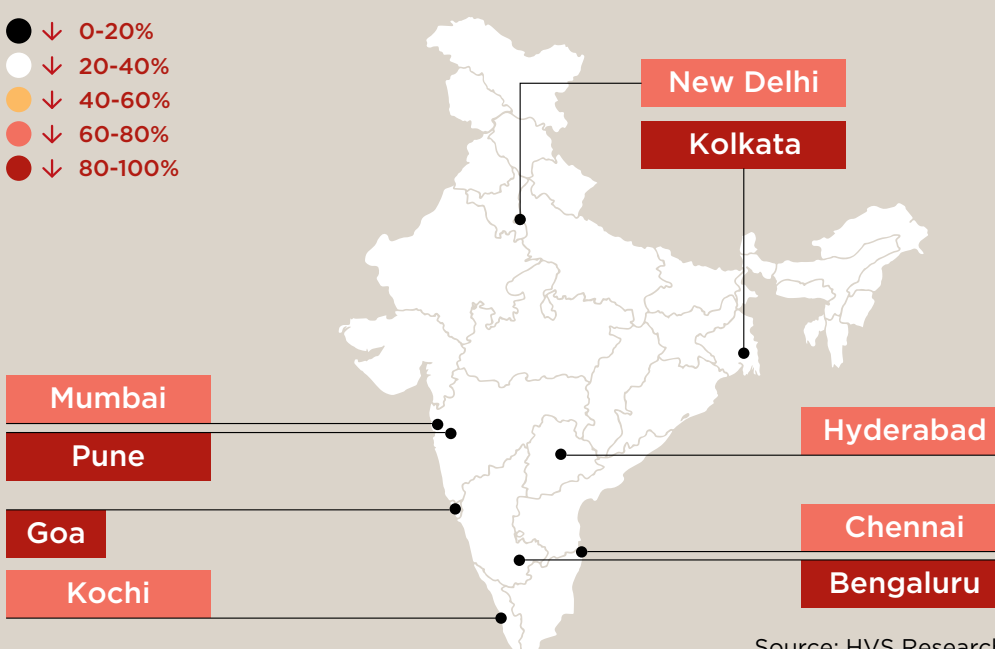
India & Other Key Asian Markets



<sup>1</sup> Occupancy % change August 2020 vs August 2019

## RevPAR Change in Key Markets

Y-o-Y (%) August 2020



Source: HVS Research

## Branded Hotels<sup>2</sup>

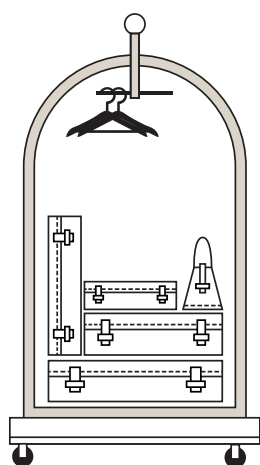
Openings & Signings in August 2020



By Keys



By Properties



Openings

6

Signings

10

706

660

## Key Highlights

- While the Average Rates in August improved vis-a-vis the previous month, Occupancy witnessed a marginal decline.
- Occupancy in India continues to be the lowest amongst other key Asia Pacific markets.
- Hotel signings have picked up as hotel owners are actively looking to engage with operators to sign new contracts.

<sup>2</sup> Data collated by HVS from 19 Hotel Operators as of 25<sup>th</sup> September 2020 for the month of August 2020

Source: HVS Research

## HVS Monday Musings

(Weekly Stories & Trends)

in READ MORE >

- AUG 31** Improving hotel ROI - Thinking out of box from design to operations
- SEP 07** Mid-market hotels to lead the Indian hotels sector revival story
- SEP 14** Hotel owners should think like institutional owners in the post-COVID era
- SEP 21** The onus lies with Us - Rebuilding trust to get back guests to eat & stay with us!
- SEP 28** Luxury boutique hotels - A growing concept in India

## Recent Webinars

- SEP 08** **HVS Webinar:** Global Hotel Performance & Values: Now And Moving Forward
- SEP 11** **ANAROCK Knowledge Exchange** with Puneet Chhatwal, MD & CEO, IHCL

## Latest Publications

- India Hotels Outlook** Impact of COVID-19
- General Manager's Sentiment Survey** 2020 Outlook

## Share Price Movement<sup>3</sup> & Key Financials<sup>4</sup>

Company <sup>5</sup>	Market Cap (₹ Cr)	Previous Close (₹)	52-week High (₹)	52-week Low (₹)	Total Income <sup>4</sup> (₹ Cr)	EBITDA <sup>4</sup> (₹ Cr)	PAT <sup>4</sup> (₹ Cr)
IHCL	12,689.4	103.6	162.9	62.1	175.0	-234.0	-280.0
EIH	5,201.3	87.7	188.0	54.7	45.0	-126.0	-152.0
Chalet Hotels	3,317.3	156.6	395.0	99.0	58.9	0.3	-39.4
Lemon Tree Hotels	2,234.1	28.5	69.0	13.8	43.8	7.5	-60.6
Mahindra Holidays & Resorts	2,398.6	176.7	252.4	122.0	325.2	49.8	-32.4

<sup>3</sup> Share movements data as on 1<sup>st</sup> September 2020

<sup>4</sup> Financial summary (consolidated) for Q1 FY21

<sup>5</sup> Company names have been abbreviated

Source: BSE & Company websites

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