



SAVE THE DATES
FEB 26 - 28, 2025

HVS | ANAROCK | HOPE 2025
HOSPITALITY OVERVIEW PRESENTATION & EXCHANGE

INDIA'S MOST EXCLUSIVE HOSPITALITY SUMMIT

GOA

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GOA

Hotel Sector

Key Stats (India Average)

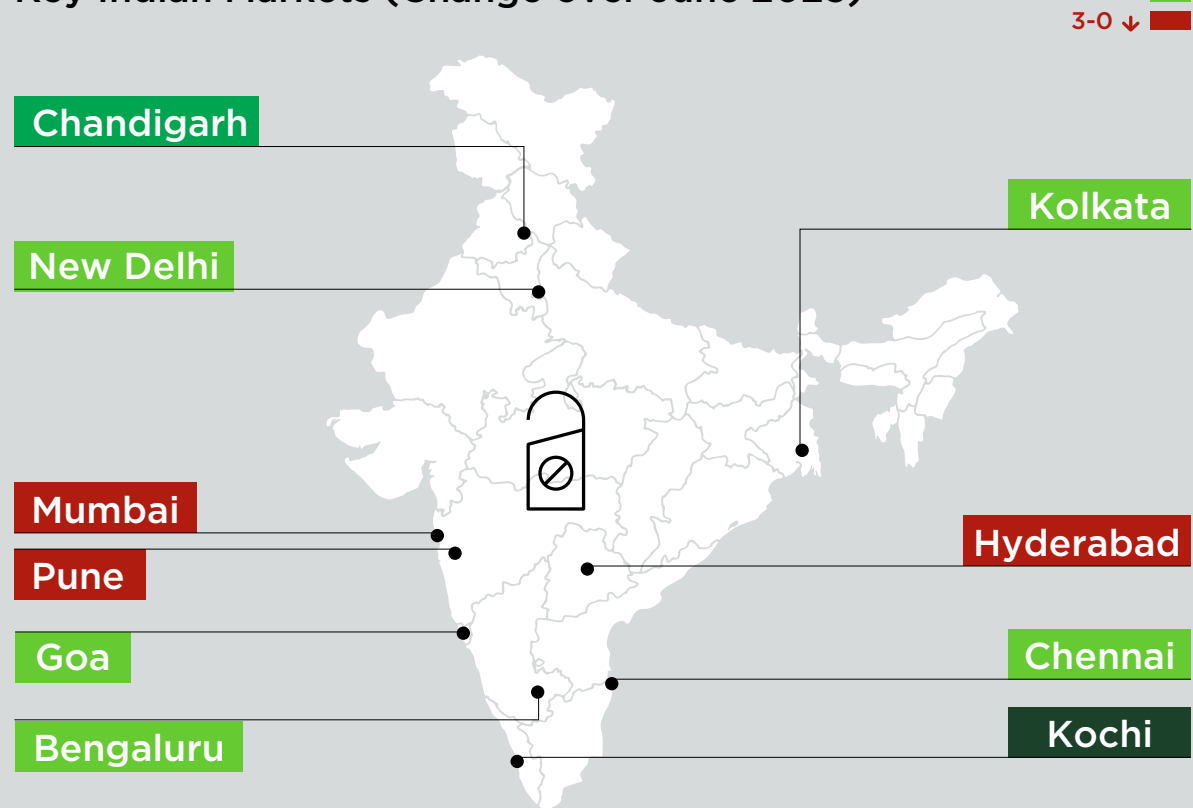
	JUNE 2024	JUNE 2019	Change over (Pre-COVID)
ADR	₹ 6,700 - ₹ 6,900		↑ 27-29%
Occupancy	61-63%		↓ 1-3 pp
RevPAR	₹ 4,087 - ₹ 4,347		↑ 24-26%

	JUNE 2023	MAY 2024	Change over (Post COVID-19)
ADR	↑ 3-5%	<-Stable->	
Occupancy	<-Stable->	↑ 1-3 pp	
RevPAR	↑ 2-4%	↑ 1-3%	



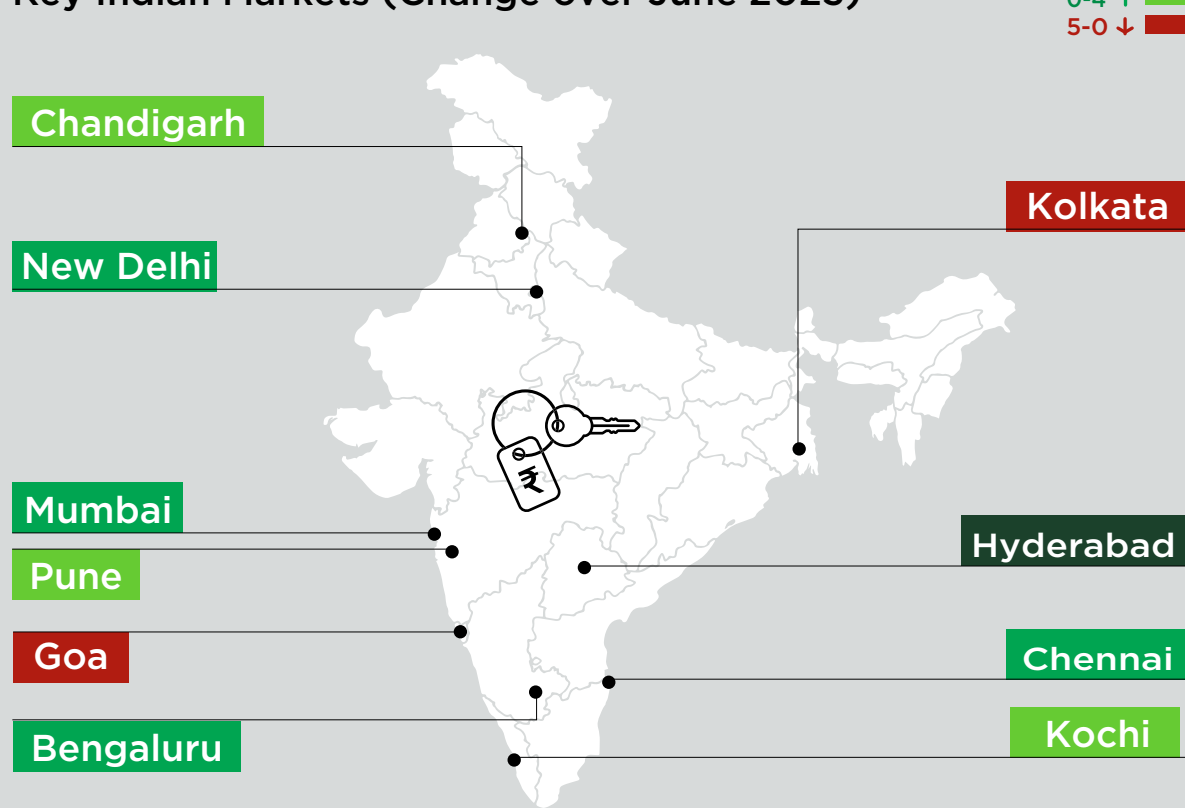
Occupancy Change¹

Key Indian Markets (Change over June 2023)



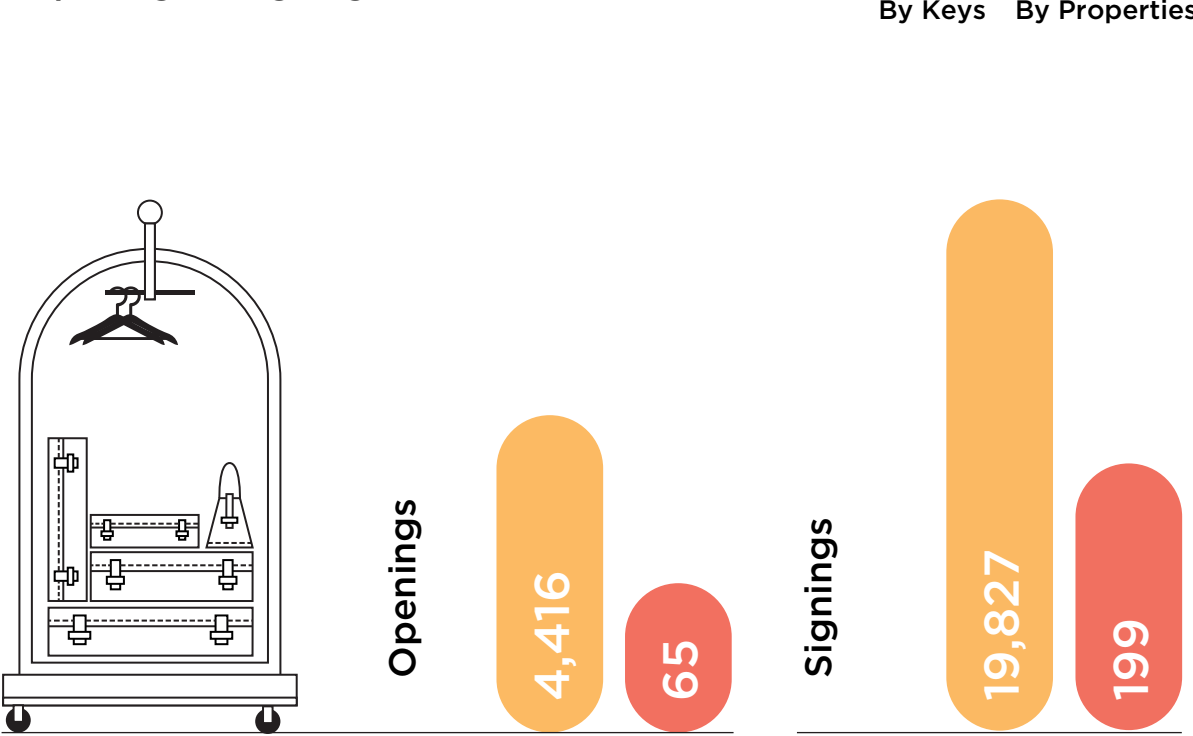
ADR Change²

Key Indian Markets (Change over June 2023)



Branded Hotels

(Openings & Signings Year-to-Date June 2024)



Source: : HVS Research; Data collated by HVS from 14 hotel operators and media reports as of 23rd July 2024, all data is for calendar year

Key Highlights

(June 2024)

- In June 2024, domestic air passenger traffic grew by nearly 6% year-on-year.
- The nation-wide occupancy remained flat for both the previous month and year-on-year basis.
- Kochi registered the highest increase in occupancy rate, growing by 7 pp year-on-year, a notable rise compared to other cities.
- Meanwhile, both Hyderabad and Mumbai experienced declines in year-on-year occupancy rates, ranging from 1-3 pp. Both cities, however, saw substantial increases in average rates, with Hyderabad leading with over a 9% year-on-year increase and Mumbai up by 7%.
- During the month Goa and Kolkata were the only markets to experience declines in average rates when compared to June 2023, with Kolkata's rates dropping by nearly 6% from May 2024 as well.

Source: HVS Research

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Share Price Movement

Company	Market Cap (₹Cr)	Previous Close (₹)	52-week High (₹)	52-week Low (₹)
IHCL	87,192.34	599.2	663.4	371.4
EIH	26,581.10	423.3	566.0	203.4
Chalet Hotels	18,583.23	857.4	959.0	433.0
Lemon Tree Hotels	11,586.60	145.5	158.0	89.9
Mahindra Holidays & Resorts	9,158.51	454.1	504.3	295.0
SAMHI Hotels Ltd	4,123.79	188.5	237.8	127.4
Apeejay Surrendra Park Hotels Ltd.	4,095.72	178.3	234.5	146.2
Royal Orchid Hotels	992.79	367.7	448.1	279.6

Source: BSE website; Share movements data as on 4th July 2024

Source: BSE

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