



HVS | ANAROCK | HOPE 2025
HOSPITALITY OVERVIEW PRESENTATION & EXCHANGE

INDIA'S MOST EXCLUSIVE HOSPITALITY SUMMIT

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Hotel Sector

Key Stats (India Average)

	AUGUST 2024	AUGUST 2019	Change over (Pre-COVID)
ADR	₹ 6,900 - ₹ 7,100		↑ 29-31%
Occupancy	60-62%		<-Stable->
RevPAR	₹ 4,140 - ₹ 4,402		↑ 30-32%

	AUGUST 2023	JULY 2024	Change over (Post COVID-19)
ADR	↑ 6-8%	<-Stable->	
Occupancy	↑ 1-3 pp	↓ -1-3 pp	
RevPAR	↑ 10-12%	↓ -2-4%	

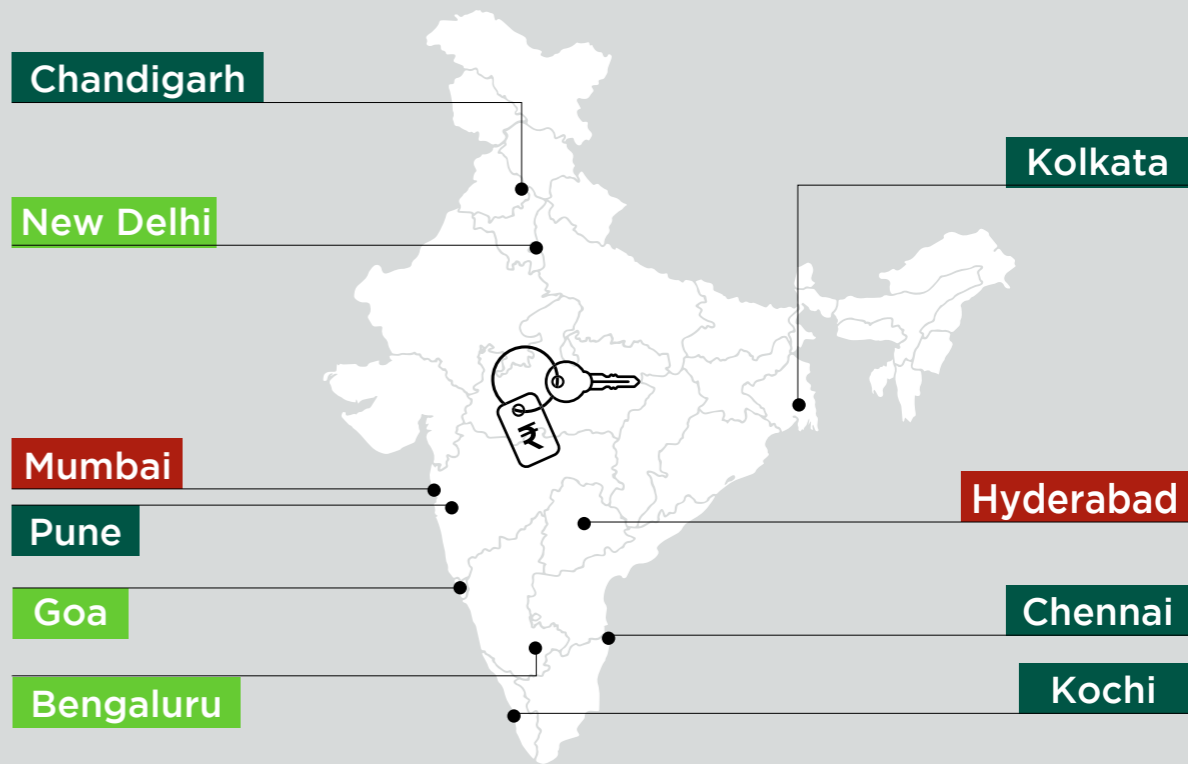
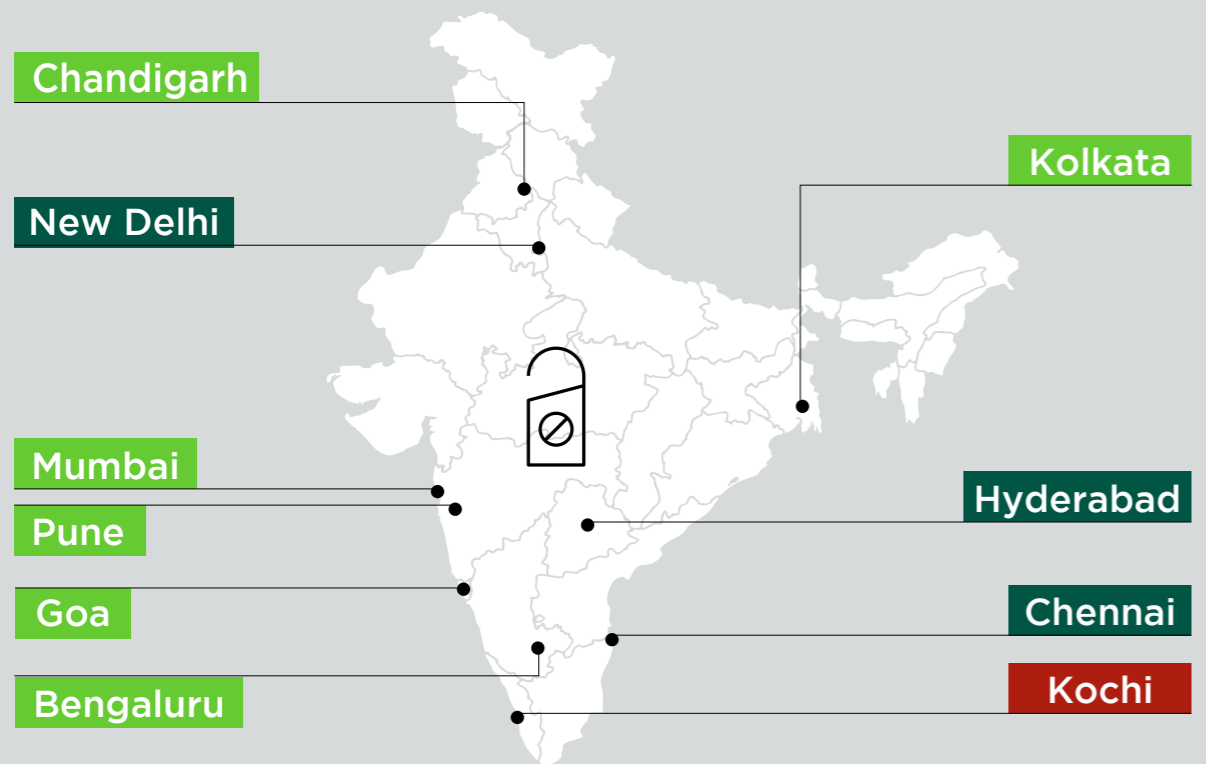


Occupancy Change¹

Key Indian Markets (Change over August 2023)

ADR Change²

Key Indian Markets (Change over August 2023)



¹ Occupancy change in percentage points (pp)

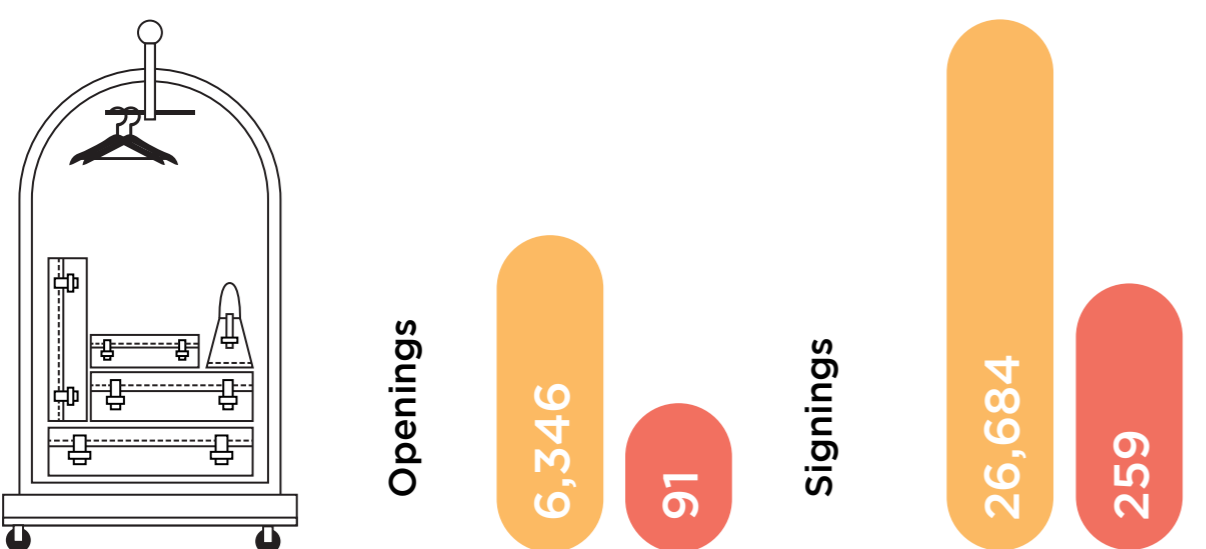
² ADR change in percentage (%)

Source: HVS Research

Branded Hotels

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

By Keys By Properties



Source: HVS Research; Data collated by HVS from 20 hotel operators and media reports as of 25th September 2024, all data is for calendar year

Key Highlights

(August 2024)

- Domestic air passenger traffic continued to increase, surpassing 13.1 million in August 2024, marking a year-on-year (y-o-y) growth of over 5.7%.
- The nationwide hotel occupancy rate maintained a stable position compared to pre-pandemic levels, with **Kochi and Hyderabad leading the pack with the highest y-o-y growth in occupancy rates.**
- Average rates increased across most markets**, driven by strong demand recovery and enhanced pricing power in the hospitality sector.
- Mumbai recorded the highest y-o-y growth in average rates**, followed closely by Hyderabad and Kochi while Goa remained range bound.

Source: HVS Research

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Share Price Movement

Company	Market Cap (₹Cr)	Previous Close (₹)	52-week High (₹)	52-week Low (₹)
IHCL	93,668.96	656.1	672.0	371.4
EIH	23,657.53	376.8	566.0	205.3
Chalet Hotels	18,924.78	856.3	959.0	527.0
Lemon Tree Hotels	10,667.60	132.7	158.0	100.7
Mahindra Holidays & Resorts	8,376.18	412.5	504.3	348.0
SAMHI Hotels Ltd	4,675.02	213.6	237.8	127.4
Apeejay Surrendra Park Hotels Ltd.	3,714.85	173.2	234.5	146.2
Royal Orchid Hotels	1,009.11	366.7	448.1	279.6

Share movements data as on 2nd September 2024

Source: BSE website

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



Akash Datta
President - Consulting & Valuation (South Asia)
adatta@hvs.com
+91 98995 17404