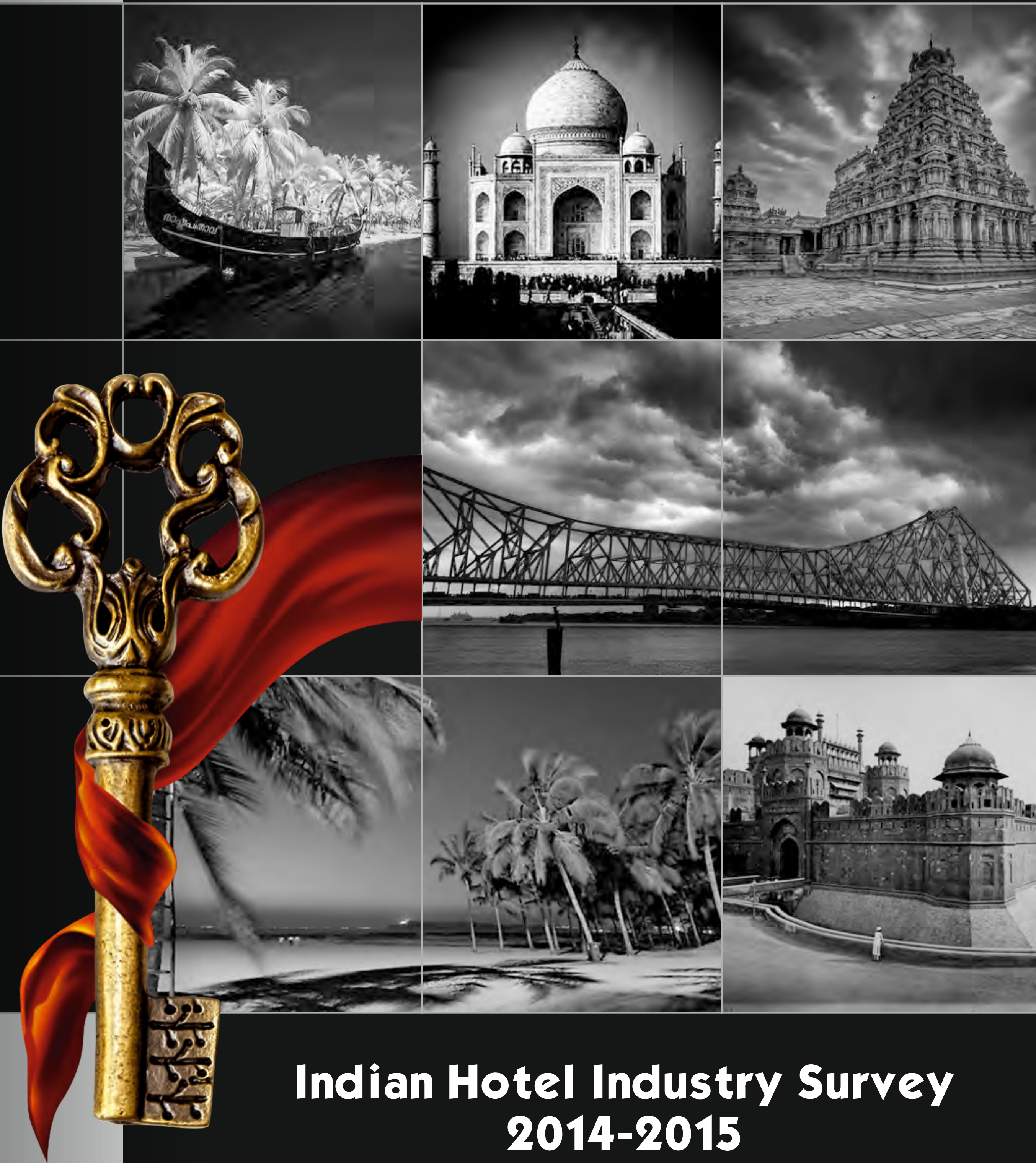

Indian Hotel Industry Survey 2014-2015

FH&RA INDIA

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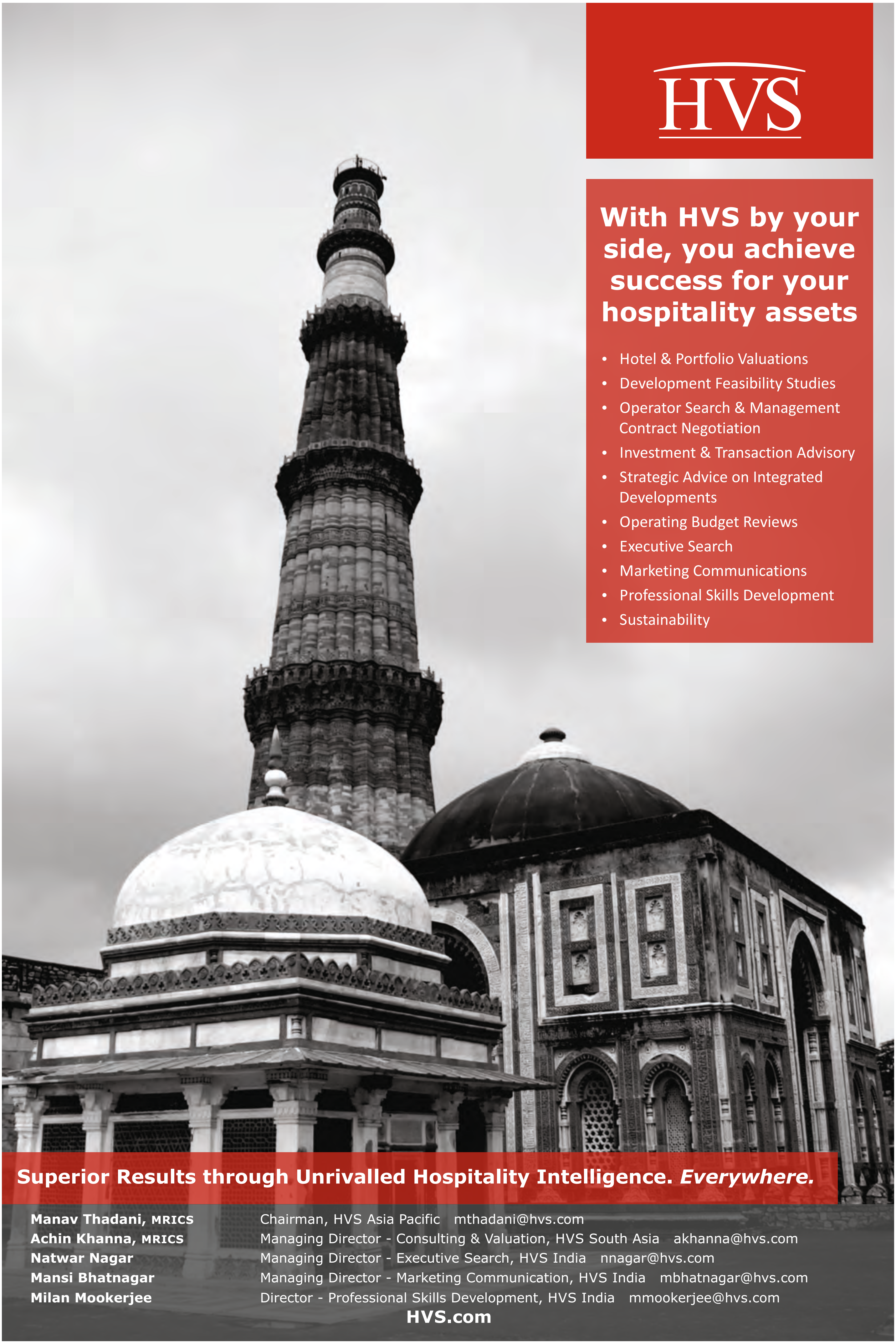
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Foreword

The Federation of Hotel & Restaurant Associations of India is pleased to present the eighteenth annual edition of the Indian Hotel Industry Survey, in cooperation with HVS South Asia. This Survey includes in-depth information about the performance of hotels across various cities and positioning and provides several benchmarks for comparing hotel performance in India. We would like to thank the participating hotels for all the detailed information they have provided, thereby helping to improve the quality of this research.

The Indian Hotel Industry Survey analyses the performance of the Indian hospitality industry across parameters such as facilities, manpower, operational performance, and marketing trends. The information is based on data received from FHRAI hotel members and the authenticity of this data helps us in providing a clear picture of the operating statistics of India's hospitality sector. Data collected from our member hotels, our extensive historic database and the credibility of our research have helped make this report a preferred tool for hotel professionals, consultants, investors, bankers, researchers, government officials in the tourism department, media persons, and all those interested in studying the Indian hotel industry.

The current edition includes an analysis of seven major cities for which we have received detailed information and twelve other cities where information was available with us for some hotels, though not in sufficient numbers for all the star categories. We earnestly request all our members to be more forthcoming with sharing the required information as this helps to take up various issues confronting the industry, both at the Centre and State level. It is only when armed with accurate data that we can convince the policy makers to give us the importance and priority that our industry deserves to fulfil its potential in India's economic growth. In the current survey, while we have basic data for 1,358 members the financial data is not available for all of them. Though the major apprehension of each one of those members for not sharing the required information for this report might be the confidentiality of their data, members should rest assured that there is complete security of data by HVS.

We encourage feedback on the presentation and content of this report to enable us to improve it each year. We are thankful to HVS South Asia for their continued support.

Bharat Malkani
President, FHRAI
www.fhrai.com

About HVS

HVS is the world's leading consulting and services organisation focused on the hotel, mixed-use, shared ownership, gaming, and leisure industries. Established in 1980, the company performs 4500+ assignments each year for hotel and real estate owners, operators, and developers worldwide. HVS principals are regarded as the leading experts in their respective regions of the globe. Through a network of more than 30 offices and 450 professionals, HVS provides an unparalleled range of complementary services for the hospitality industry.

HVS South Asia was established in 1997 and has risen to be the only dedicated hospitality-consulting firm in this region. It currently offers its Consulting and Valuation services to clients with interests in the South Asian Region covering India, Sri Lanka, Bangladesh, Pakistan, Nepal, Bhutan and the Maldives. The different verticals based on the services offered by the New Delhi Office are mentioned below:

CONSULTING AND VALUATION

HVS Consulting and Valuation, with a presence in India spanning almost two decades, has established itself as a market leader and today our professional services have expanded to include a wide range of consulting activities, all geared to enhance economic returns and asset value for our clients. We, at HVS, understand the hotel business and our consultants are qualified with education from leading hospitality schools around the world, while also possessing actual experience of hotel operations. HVS's knowledge, extensive experience and understanding of the hospitality industry in South Asia enables us to produce well-documented reports that contain valuable insight and effective advice.

Our specialised consulting and valuation services include market studies, market entry and expansion strategies, feasibility studies and return-on-investment analyses, development strategy recommendations, valuations (single asset and portfolio), land bid evaluations and residual land valuations, investment and transaction advisory services (buy and sell side), operator search and management contract negotiations.

EXECUTIVE SEARCH

Executive Search, another vertical to the base of services offered, entered the Indian subcontinent in 2001 and currently manages diverse portfolios across varied sectors. Practice areas include senior-level executive search, mid-management recruitment and compensation consulting. Our senior level executive search practice is industry specific focusing on functional specialty areas including CEOs & Board Directors, Financial officers, Acquisitions/Development, Asset Management, Human Resources, Operations, and Sales & Marketing. Over the years, the team has diversified extensively and provides advisory services to leaders of the hotel, restaurant, real-estate, automotive, retail, education, manufacturing, media, telecom, and energy industries.

MARKETING AND COMMUNICATIONS

HVS Marketing Communications (HVS MC) offers strategic turnkey marketing and creative support to upcoming and operational hotels in addition to hospitality brands, in India. Underlined with in-depth understanding of the hospitality market and operations, HVS MC has the ability to conceptualize proactive positioning and marketing strategies and deliver their creative implementation, all with a focus on return on investment. It endeavours to create, recommend and implement successful marketing solutions for hotel brands whilst at the same tome maximize the brand through consistent creative communications.

Our services include conceptualization and implementation of turn-key hotel launch marketing, strategic planning, promotional marketing, brand architecture and logo development, creative design, digital marketing and effective and proactive implementation.

ENERGY AND SUSTAINABILITY

Energy and Sustainability provides a range of business-driven consulting services that enable hospitality firms to identify cost saving opportunities, enhance operational efficiency, and demonstrate a positive commitment to the environment, guests, investors, and other relevant stakeholders. HVS works directly with hotel owners and operators helping them reduce their operating expenses through diligent facility management and informed strategic investment into building equipment. We adapt our approach on an asset-by-asset basis and focus on the provision of financially-viable recommendations that can be immediately incorporated into both operational and capital plans for a particular property. Our unique approach leverages the resources and technical expertise of the world's leading engineers, facility management professionals, and equipment vendors. We further promote accessibility to conventional and non-conventional financing mechanisms for utility efficiency projects. We specialise in benchmarking, investment-grade auditing, project implementation support and strategic advisory.

PROFESSIONAL SKILLS DEVELOPMENT

HVS Professional Skills Development aims to provide superior Learning and Development (L&D) solutions that emphasise Talent Development and Performance Enhancement. The L&D program envisions best in class trainings in Customer Service, Leadership Development Programs, Sales and Marketing, Finance and Human Resources. We cater to sectors like Hotels, Healthcare, Retail, Financial Institutions, Cinema and Restaurants.

Our programs are designed for the benefit of executives and managerial-level professionals. HVS's superior industry knowledge and our valuable partnerships with reputed universities and subject matter experts have made these focused and enriching courses possible.

OUR CONFERENCES

The Indian Hotel Industry Survey 2014-2015 brings together the industry's key statistics and serves as an easy reference volume. We are grateful to all those who have contributed towards the same and look forward to increased participation in the years to come.

Achin Khanna
Managing Director

Shunit Roy
Analyst

Rishabh Thapar
Associate

Tulika Das
Assistant Manager

Synopsis and Key Highlights

Introduction

The Indian hospitality industry has emerged as one of the key industries driving the growth of the services sector and, thereby, the Indian economy. The **FHRAI Indian Hotel Survey 2014-2015** aims to provide the most comprehensive guide to All-India performance trends for this industry. Results of the Survey will empower industry stakeholders such as owners, investors, operators, business analysts and researchers with information on the operational aspects of the industry. It will also help owners benchmark the performance of their operations against industry standards and seek professional help if corrective measures are required.

Data Collection

The data for the FHRAI Indian Hotel Survey 2014-2015 has been contributed by the member hotels of FHRAI. The FHRAI sends out a questionnaire to each of its members (numbering approximately 2,600), the responses to which are then analysed and presented in this Survey. The data presented in the current edition is culled from 1,358 responses.

Methodology

The data received from hotels participating in the Survey is sorted and filtered according to the objectives of the Survey. The data is then processed and analysed to extract important information pertaining to the performance of the Indian hospitality sector across crucial parameters. These parameters, such as guest segmentation, hotel finances, marketing, sources of reservations, and seasonality among others are then presented under the following categories:

- **Star:** Five-Star Deluxe, Five, Four, Three, Two, One-Star and Heritage hotels along with Other hotels (which are not classified under any star rating).

- **Inventory:** Number of rooms in hotels are categorised as Less than 50 Rooms, 50-150 Rooms, and More than 150 Rooms.

- **Affiliation:** The two types of affiliations used to categorise hotels are Affiliated to Chain, and Independent.

- **Primary Markets:** The seven major cities covered in this report are Bengaluru, Chennai, Delhi-NCR, Goa, Kolkata, Mumbai and Pune.

- **Secondary Markets:** The 12 secondary cities presented in this report are Agra, Ahmedabad, Gurgaon, Hyderabad, Indore, Jaipur, Kochi, Madurai, Mysore, Nashik, Thiruvananthapuram and Udaipur.

Qualifying Conditions

- While it is our endeavour to represent all the cities in India, we are limited by the data received from the participating hotels. In order to make the study relevant, we present data for only those categories for which we have a minimum of four participating hotels.

- Hotels across different categories showing similar characteristics have been combined under the same category when sufficient responses are not available for each category.

- To facilitate better evaluation of data across comparable groups, the financial statements are presented through Net Income, before any deduction of depreciation and interest, which are hotel/owner specific.

Limiting Condition

- In some cases, there are large fluctuations in the data and this noise in the data may be attributed to the changing participation in the survey and may not be an accurate representation of market performance.

Presentation of Financial Data

- **Percentage of Revenue** is an assessment of costs as a percentage of revenue. Departmental expenses are portions of individual revenue heads while Operating and Fixed Expenses are deducted from Gross Hotel Revenue following the international accounting guidelines.

- **Amount per Available Room (PAR)** is the financial performance of a single room and is based on the total inventory.

- **Amount per Occupied Room (POR)** is the performance of a single occupied room.

  All amounts presented in this report have been rounded to the nearest whole number and are in Indian rupees (₹) for the fiscal year 2014-2015 (April-March). In the financial statements, rupee amounts are provided as amounts per available room (PAR) and per occupied room (POR) in order to eliminate differences in the size of hotels surveyed.

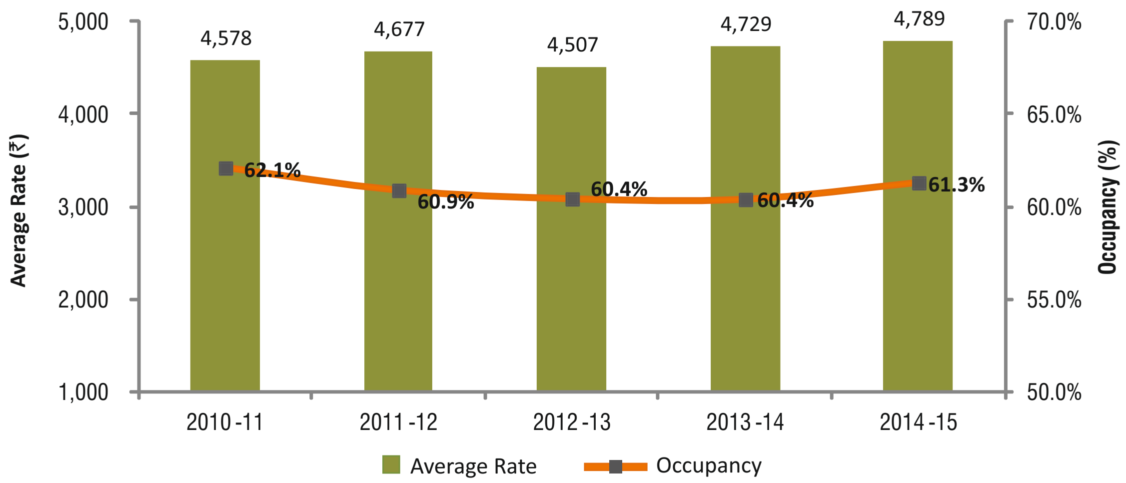
Key Trends

This Section highlights countrywide trends and statistics using data from the past five years' surveys. Subsequently, the city scenarios are highlighted for the seven major cities and 12 secondary cities across the country.

Indian Hotel Industry Performance – Country Trends

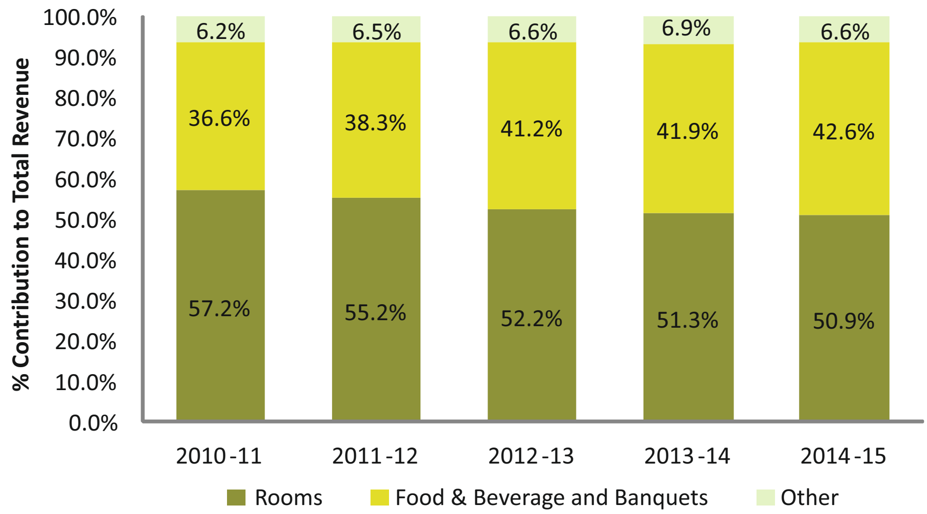
- **Occupancy and Average Rate:** The average rate for 2014-15, ₹4,789, showed a modest improvement over that last year (₹4,729), which was previously the highest since 2009-10. Hotel occupancy, too, increased to 61.3% after two years of stagnation at 60.4% (Exhibit 1).

EXHIBIT 1: Occupancy and Average Rate (2010-11 to 2014-15)



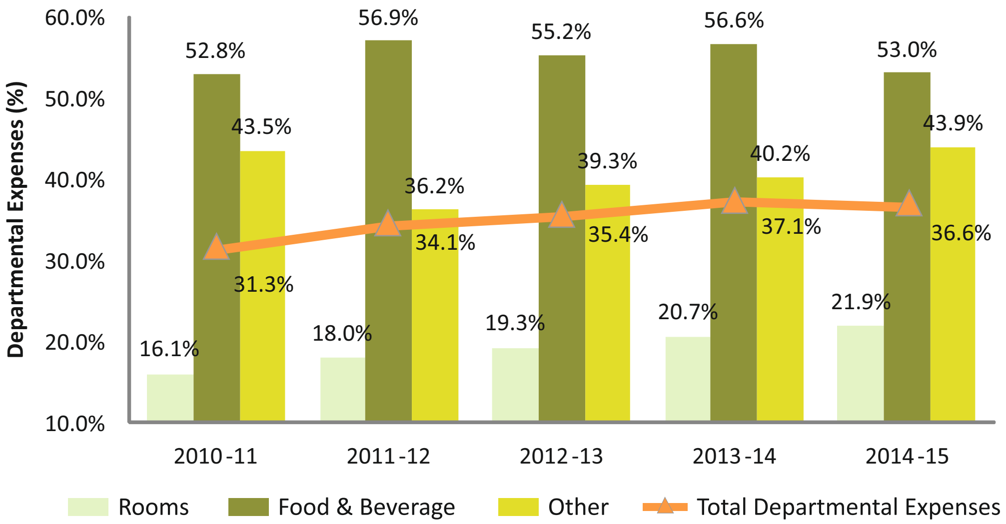
- **Changes in the Revenue Structure:** The last few years witnessed a steady decline in the contribution of revenue from Rooms while that from F&B continually improved; this trend was observed in the current year too (Exhibit 2). However, 'Other' sources of income saw a decline from 6.9% in 2013-14 to 6.6% this year in contrast to the incremental improvement towards revenue contribution observed from 2010-11 to 2013-14.

EXHIBIT 2: Sources of Revenue (2010-11 to 2014-15)



- **Expense Dynamics:** Since 2010-11, a trend of increasing Departmental Expenses as a percentage of Total Revenue at an All-India level had been observed (Exhibit 3). However, in 2014-15, the Departmental Expenses as a percentage of Total Revenue decreased by 1.3%. Rooms expenses increased by 5.9% over those last year, adversely impacting most star categories. F&B expenses, however, decreased to an All-India average of 53.0% from 56.6% in 2013-14. This decrease in expenses has been offset by the combined rise in expenses for Rooms and Other departments resulting in an overall difference of 1.3% in the total Departmental Expenses between the current and past year.

EXHIBIT 3: Departmental Expenses (2010-11 to 2014-15)



- **Operating Cost Analysis:** The Survey reveals that many costs have increased significantly this year. Rooms expenses increased by 10.2% on a per available room (PAR) basis this year over those last year. Administrative and General Expenses, Management Fees and Marketing costs have increased by 11.6%, 12.0% and 12.0%, respectively over those in 2013-14. Fixed Expenses, too, have risen this year on a PAR basis, translating to an increase of 14.7% over last year.

- **Guest Analysis:** Domestic travel has always comprised the majority of demand in India and still continues to do so (Table 1-5). It is important to note that though the Domestic Business traveller contributed to 32.7% of the total demand as compared to 21.7% by the Domestic Leisure traveller (excluding tour groups), it is the latter that has demonstrated greater year-on-year growth. Foreign demand, on the other hand, reduced in terms of tour groups while the Leisure/FIT segment remained unchanged as compared to last year. The Foreign Business demand, however, declined by 2.0% in comparison.

- **Cash Sales:** Cash Sales have shown a clear trend of diminishing since 2009-10, and the trend has continued this year, too. Cash Sales exhibited a drop from 36.1% in 2013-14 to 34.7% for 2014-15; and, naturally incremental increases have been observed in both Credit Card Sales and Electronic Fund Transactions. However, Credit Sales, have reported a decrease in sales of 5.6% as compared to the sales in the previous year.

- **Net Income:** Referring to Exhibit 4 it may be evident at first glance that Net Income, expressed as a percentage of Total Revenue has been exhibiting a declining trend between 2010-11 and 2014-15; however, it may be noted that both Revenue and Net Income on a PAR basis has been steadily increasing year on year. Since Net Income is a function of costs as well as revenues, the decline of Net Income as a percentage from 32.4% in 2010-11 to 28.9% in 2014-15 is primarily owed to the relative rate of growth in costs when compared to the rate of growth of revenues.

While many departmental and operating expenses for 2014-15 have increased at a rate north of 10.0%, revenues have increased at 4.0% for Rooms and 6.6% for F&B (restaurants and banquets). It may be noted that both on a PAR and POR basis, the Net Income has been the highest recorded in the past five years.

EXHIBIT 4: Revenue and Net Income (2010-11 to 2014-15)

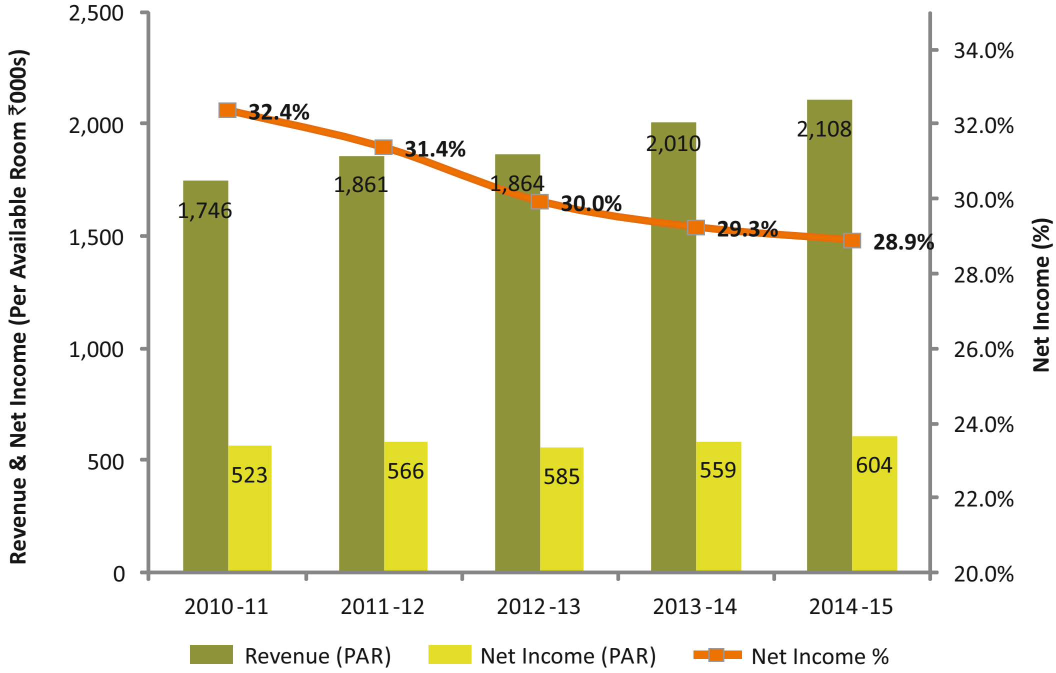


Table 1 Illustrates the nationwide key operating statistics of the respondents of the Survey.

TABLE 1: Trends in Key Operating Statistics

COMPOSITION	2010-2011 All-India Average	2011-2012 All-India Average	2012-2013 All-India Average	2013-2014 All-India Average	2014-2015 All-India Average
Number of responses:	544	515	629	551	562
Average Total Rooms Per Hotel:	72	77	74	74	78
Average Occupied Rooms Per Hotel:	15,768	16,864	15,990	16,126	17,424
Average Occupancy Per Hotel:	62.1%	60.9%	60.4%	60.4%	61.3%
Average Rate Per Hotel (₹):	4,578	4,677	4,507	4,729	4,789
			Percentage of Revenue		
REVENUE					
Rooms	57.2%	55.2%	52.2%	51.3%	50.9%
Food & Beverage	27.0	27.9	29.0	29.2	31.0
Banquets & Conferences	9.6	10.4	12.2	12.7	11.5
Telephone & Other	0.5	0.4	0.4	0.4	0.3
Minor Operated*	2.6	3.1	2.9	3.3	3.3
Rental & Other Income	3.1	3.0	3.3	3.1	3.0
Total	100.0	100.0	100.0	100.0	100.0
DEPARTMENTAL EXPENSES					
Rooms	16.1	18.0	19.3	20.7	21.9
Food & Beverage	52.9	57.0	55.2	56.6	53.0
Telephone & Other	104.0	94.7	91.7	104.7	88.1
Minor Operated*	70.4	57.4	66.0	61.6	71.2
Rental & Other Income	11.3	7.4	9.4	9.8	8.7
Total	31.3	34.1	35.4	37.1	36.6
DEPARTMENTAL INCOME	68.7	65.9	64.6	62.9	63.4
OPERATING EXPENSES					
Administrative & General	9.6	10.2	9.5	9.0	9.6
Management Fee	2.8	2.7	2.0	2.0	2.1
Marketing	3.7	3.1	3.0	3.1	3.3
Franchise Fees	0.3	0.5	0.5	0.3	0.2
Property Operations & Maintenance	6.0	5.6	5.9	5.4	5.2
Energy	8.5	8.7	9.8	10.3	10.1
Total	31.0	30.9	30.7	30.1	30.5
HOUSE PROFIT	37.8	35.0	33.8	32.9	32.9
FIXED EXPENSES					
Property Taxes	0.9	0.7	0.8	1.3	1.0
Insurance	0.3	0.3	0.3	0.3	0.3
Other Fixed Expenses	2.8	1.5	1.4	1.1	1.7
Rent	1.4	1.1	1.3	1.0	1.0
Total	5.4	3.6	3.9	3.6	3.9
NET INCOME**	32.4%	31.4%	30.0%	29.3%	28.9%

COMPOSITION	2010-2011 All-India Average	2011-2012 All-India Average	2012-2013 All-India Average	2013-2014 All-India Average	2014-2015 All-India Average
Number of responses:	544	515	629	551	562
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Average Rate Per Hotel (₹):	4,578	4,677	4,507	4,729	4,789
			Amount Per Available Room (₹)		
REVENUE					
Rooms	9,97,815	10,26,910	9,73,670	10,30,606	10,72,198
Food & Beverage	4,71,013	5,19,739	5,41,494	5,86,539	6,54,374
Banquets & Conferences	1,68,253	1,93,211	2,26,793	2,55,429	2,42,917
Telephone & Other	8,600	7,158	6,693	7,434	7,016
Minor Operated*	45,825	57,221	54,881	67,232	69,140
Rental & Other Income	54,294	56,586	60,800	63,069	62,279
Total	17,45,800	18,60,820	18,64,330	20,10,310	21,07,924
DEPARTMENTAL EXPENSES					
Rooms	1,60,980	1,85,231	1,88,227	2,13,085	2,34,921
Food & Beverage	3,37,840	4,06,005	4,24,357	4,76,771	4,75,762
Telephone & Other	8,945	6,775	6,140	7,783	6,179
Minor Operated*	32,254	32,827	36,208	41,431	49,234
Rental & Other Income	6,124	4,195	5,735	6,163	5,402
Total	5,46,142	6,35,033	6,60,667	7,45,233	7,71,499
DEPARTMENTAL INCOME	11,99,660	12,25,790	12,03,660	12,65,077	13,36,425
OPERATING EXPENSES					
Administrative & General	1,67,965	1,89,533	1,77,611	1,81,078	2,02,024
Management Fee	49,008	50,767	37,389	39,962	44,760
Marketing	65,375	58,263	56,470	62,150	69,613
Franchise Fees	5,317	10,014	8,920	6,905	4,160
Property Operations & Maintenance	1,05,099	1,03,827	1,09,845	1,08,573	1,09,692
Energy	1,47,899	1,61,479	1,82,067	2,06,132	2,13,600
Total	5,40,662	5,73,883	5,72,302	6,04,799	6,43,850
HOUSE PROFIT	6,58,996	6,51,908	6,31,362	6,60,277	6,92,575
FIXED EXPENSES					
Property Taxes	15,310	13,478	15,571	26,145	21,638
Insurance	5,727	5,297	6,231	5,818	5,890
Other Fixed Expenses	48,282	27,797	26,773	21,103	35,490
Rent	24,044	20,803	23,777	19,352	20,061
Total	93,363	67,374	72,353	72,417	83,078
NET INCOME**	5,65,633	5,84,534	5,59,009	5,87,860	6,09,497

COMPOSITION	2010-2011 All-India Average	2011-2012 All-India Average	2012-2013 All-India Average	2013-2014 All-India Average	2014-2015 All-India Average
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Average Rate Per Hotel (₹):	4,578	4,677	4,507	4,729	4,789
			Amount Per Occupied Room (₹)		
REVENUE					
Rooms	4,578	4,677	4,507	4,729	4,789
Food & Beverage	2,161	2,367	2,506	2,691	2,923
Banquets & Conferences	772	880	1,050	1,172	1,085
Telephone & Other	39	33	31	34	31
Minor Operated*	210	261	254	308	309
Rental & Other Income	249	258	281	289	278
Total	8,009	8,476	8,629	9,224	9,414
DEPARTMENTAL EXPENSES					
Rooms	739	844	871	978	1,049
Food & Beverage	1,550	1,849	1,964	2,188	2,125
Telephone & Other	41	31	28	36	28
Minor Operated*	148	150	168	190	220
Rental & Other Income	28	19	27	28	24
Total	2,506	2,892	3,058	3,419	3,446
DEPARTMENTAL INCOME	5,504	5,583	5,571	5,804	5,969
OPERATING EXPENSES					
Administrative & General	771	863	822	831	902
Management Fee	225	231	173	183	200
Marketing	300	265	261	285	311
Franchise Fees	24	46	41	32	19
Property Operations & Maintenance	482	473	508	498	490
Energy	679	736	843	946	954
Total	2,480	2,614	2,649	2,775	2,876
HOUSE PROFIT	3,023	2,969	2,922	3,029	3,093
FIXED EXPENSES					
Property Taxes	70	61	72	120	97
Insurance	26	24	29	27	26
Other Fixed Expenses	222	127	124	97	159
Rent	110	95	110	89	90
Total	428	307	335	332	371
NET INCOME**	2,595	2,662	2,587	2,697	2,722

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth

** Net Income is before depreciation, interest payments and taxes

City Trends

Table 2 illustrates average occupancy and rate for 30 cities/regions across the country over the last five years as culled from FHRAI Survey results. It should be noted that since the respondent sets are not the same every year, comparison of performance between years across hotel markets is not entirely accurate. The table is followed by HVS's viewpoint on the demand-supply scenario and performance of the 19 identified hotel markets based on in-house research.

TABLE 2: Average Occupancy and Average Room Rate: 30 Cities/Regions in India

	Occupancy					Average Room Rate (₹)				
City	2010-11	2011-12	2012-13	2013-14	2014-15	2010-11	2011-12	2012-13	2013-14	2014-15
All India	**62.1%**	**60.9%**	**60.4%**	**60.4%**	**61.3%**	**4,578**	**4,677**	**4,507**	**4,729**	**4,789**
Agra	63.2%	68.3%	60.3%	57.7%	61.9%	3,968	3,974	4,381	3,988	4,632
Ahmedabad	67.6%	65.1%	63.0%	60.4%	63.1%	3,234	3,650	3,902	3,106	4,018
Aurangabad	59.5%	ID	49.0%	ID	56.7%	2,612	ID	3,203	ID	3,451
Bengaluru	53.8%	58.7%	56.6%	59.7%	61.2%	5,838	6,849	5,533	6,300	5,712
Bhopal	ID	78.0%	72.4%	67.7%	77.4%	ID	3,827	4,300	3,366	2,940
Chandigarh	70.4%	ID	65.4%	54.9%	ID	4,544	ID	3,639	4,396	ID
Chennai	64.8%	69.1%	69.8%	68.2%	62.0%	5,508	4,365	4,345	4,043	4,096
Coimbatore	72.8%	66.5%	61.3%	59.3%	ID	3,989	4,100	3,655	2,987	ID
Delhi - NCR*	59.0%	61.4%	57.1%	57.7%	63.3%	6,763	7,319	7,455	8,282	7,467
Goa	64.4%	69.5%	67.7%	69.9%	67.6%	7,807	5,856	5,749	5,643	6,737
Hyderabad	53.3%	55.4%	55.7%	56.9%	61.5%	4,152	4,020	3,856	3,367	2,924
Indore	65.4%	57.9%	61.4%	55.8%	54.8%	1,869	2,590	2,631	2,032	2,191
Jaipur	64.0%	59.4%	58.6%	57.3%	55.5%	3,071	3,447	3,490	3,878	4,068
Jodhpur	49.2%	48.8%	46.3%	45.0%	45.5%	5,519	7,005	8,431	11,350	11,300
Kochi	74.2%	81.1%	71.5%	68.4%	68.6%	1,528	1,536	2,882	2,186	2,498
Kolkata	65.4%	67.1%	67.1%	70.1%	67.7%	4,788	5,302	5,461	5,230	4,867
Lucknow	59.8%	63.3%	65.0%	68.8%	64.7%	2,393	2,966	3,047	3,426	5,401
Mount Abu	63.0%	ID	ID	ID	ID	2,821	ID	ID	ID	ID
Mumbai	69.0%	73.5%	71.5%	72.9%	74.5%	5,087	6,063	5,971	5,397	5,954
Mussoorie	52.5%	39.4%	ID	ID	ID	5,817	4,807	ID	ID	ID
Mysore	71.4%	62.4%	65.7%	ID	65.6%	4,634	1,973	3,738	ID	4,230
Nagpur	76.6%	ID	54.1%	60.9%	ID	2,314	ID	3,018	1,654	ID
Nashik	ID	ID	ID	63.5%	60.5%	ID	ID	ID	1,737	1,928
Pune	53.3%	53.2%	57.8%	58.3%	60.4%	3,140	3,293	2,724	2,963	3,018
Shimla	42.7%	47.8%	56.5%	53.1%	57.0%	2,267	1,904	2,636	2,139	3,909
Thiruvananthapuram	61.8%	60.9%	57.1%	53.6%	59.3%	1,380	2,330	1,474	2,590	2,691
Udaipur	55.2%	52.1%	59.5%	50.9%	46.9%	7,406	2,081	4,449	9,698	10,470
Vadodara	77.8%	71.7%	68.0%	60.6%	60.2%	3,703	3,901	3,698	3,454	2,537
Visakhapatnam	76.3%	ID	63.3%	59.0%	ID	5,431	ID	3,367	4,371	ID
Gurgaon**		65.5%	61.0%	58.2%	64.8%		8,122	7,776	7,691	8,258

ID: Insufficient Data
**Delhi - NCR data including Faridabad, Ghaziabad, Gurgaon and NOIDA (Shaded Portion), rest excluding Gurgaon data*
***Gurgaon - included with Delhi - NCR for 2010/11*

Seven Major Cities

Bengaluru

Bengaluru is the top IT/ITeS market in the country with almost 80.0% of the global IT companies basing their India operations here; and, the sector occupies a significant chunk of the city's 134 million square feet of office stock. The availability of land and Bengaluru's first mover advantage in the IT sector, coupled with a highly skilled workforce has made the city an attractive investment destination for players in the hospitality sector. Bengaluru is currently the third-largest hotel market in the country.

On the other hand, the dependence on IT has also made the Bengaluru hotel market vulnerable to global economic changes, given the high foreign-to-domestic ratio. However, while the technology sector will remain the main demand generator for hotels, the growth of start-ups, aeronautical engineering, steel, biotechnology, and mining sectors in the city gives us reason to believe that this vulnerability will decline in the long term. Other challenges such as the city's crippling infrastructure and the absence of a world-class convention centre are areas that require the immediate attention of the state government.

With regard to hotel market performance, occupancy and average rate have remained resilient in 2014-15 as compared to the previous fiscal, despite the influx of supply and slowdown in the IT/ITeS sector. While the Commercial (Business travel) segment continues to be the highest contributor to room night demand in the city, it is interesting to note a substantial increase of Extended Stay and Meetings and Conferences demand, which enables the hotels to maintain baseline occupancies.

Going forward, Bengaluru is anticipated to witness an influx of almost 3,000 rooms over the next five years. Entry of these rooms into the market is anticipated to be phased in gradually and, therefore, help maintain steady growth of RevPAR over the next few years. Improved pace of corporate travel and increased demand for meetings and events will also help hotels in the city witness steady year-on-year growth.

Chennai

After reeling under supply pressure for the last three years, Chennai is now witnessing a comeback with the market recording a double-digit occupancy growth year-to-date in 2015-16. This growth is owed to an increase in Commercial demand from the IT/ITeS and financial sectors as well as the upcoming demand from Meetings and Conferences.

The IT corridor of Chennai, OMR, has witnessed an increase in demand as well as hotel occupancies this year despite the opening of the Novotel-Ibis in Siruseri. While this is an encouraging sign for the micromarket, OMR is likely to experience supply pressure in the near term as an additional seven hotels (with over 1,200 rooms) are expected to become operational over the next couple of years.

The MICE segment is emerging in Chennai with large-scale pharmaceutical and investment conferences contributing to the city's occupancy in the current fiscal. Furthermore, the opening of hotels with large inventories and convention spaces such as the ITC Grand Chola and The Leela Palace will continue to attract substantial numbers of regional/national conferences to the city, consolidating its position as a promising MICE destination.

While there has been a sharp increase in the city occupancy this year with hotels strategising on building occupancies along with rising MICE contribution, the average rates have remained stagnant. Going forward, with limited supply entering the city (except OMR), we expect most micromarkets to perform well as they achieve optimal occupancy and build on average rates.

Delhi-National Capital Region (Excluding Gurgaon)

The Delhi-National Capital Region (NCR) consists of hotels located in Delhi, Faridabad, Ghaziabad, NOIDA, and Greater NOIDA. As the capital and the leading growth centre of the country, Delhi continues to be a strong market for hotels despite supply pressures.

In the past year, contrary to the anticipated supply pressure by the Aerocity hotels, the branded budget and mid-market hotels located within successfully absorbed demand that was previously catered to by the unorganised market. However, peripheral micromarkets such as East Delhi, Dwarka and West Delhi saw limited RevPAR growth in the absence of a strong Commercial demand base, and continued to be largely dependent on MICE and the low-paying Leisure business. Going forward, the future supply is mainly planned in the Aerocity hospitality district, given the high barriers to entry in the city. The moderate supply growth coupled with the promising Indian economy bodes well for the nation's capital, making our outlook for the market positive.

NOIDA and Greater NOIDA, over the last six years, have displayed dismal performance as hotel markets with occupancy and average rates declining consistently over the years. The region recorded the lowest occupancy (48%)[1] in 2014-15 across all major markets in the country, considering limited increase in supply. This is a clear reflection of the weak nature of hotel demand within the market, in addition to ongoing displacement of Commercial and Leisure demand to neighbouring areas such as Ghaziabad and East Delhi. Supply pressure, along with slow growth in demand has caused severe rate pressures within these micromarkets. Moreover, while the region played host to several large conventions and events historically such as the Formula 1 Grand Prix and Petrotech, the likelihood of such events being hosted again in the near future is presently unknown. With sluggish increase in demand combined with the anticipated growth in supply, we believe these micromarkets will continue to face occupancy and rate pressures.

Goa

Having witnessed two large ticket hotel transactions (Park Hyatt Goa and Leela Goa), the Goa hotel market has been in the limelight for the last 12 months. While one may argue the subjective aspect behind these sales, on a more macro level, this momentum definitely reaffirms investor confidence in the hotel market and its long-term potential. Over the last year, even though baseline occupancies were under pressure due to the ongoing geo-political crisis in Russia (largest international feeder market), coupled with weak business sentiment in the Eurozone, a shift in focus to the ever-buoyant and higher paying domestic segment cushioned the situation and drove RevPAR up for the hotel market in Goa.

An uptake in investor confidence also resulted in the state government announcing a slew of infrastructure projects and policy measures that were long overdue. These included the active development of the MOPA Airport, which is expected to be built in a public private partnership (PPP) mode. The bidding process, which is in process, involves the state government identifying five bidders as potential partners for the development of the airport; the Airports Authority of India (AAI) has already been shortlisted. In addition to the above, the government has also announced the development of a stand-alone convention facility and has allocated funds to augment overall road connectivity within the state. Furthermore, to strengthen the state's image as the country's preferred leisure destination, Goa Tourism Development Corporation (GTDC) has started a campaign to promote experiential travel in off-beat locations and is also encouraging private participation in hospitality by way of easing licensing and procedural requirements. While these initiatives by the government definitely point in the right direction, effective and timely execution of the same is extremely critical for the long-term sustainable growth of the state.

Kolkata

Kolkata, the East Indian city known for its rich cultural heritage, has steadily continued on the path of urban development in the past few years. While the main commercial activity, driven by PSUs, manufacturing, local businesses and the commodities market remains concentrated in the Central Business District (CBD) area, government impetus has enabled rapid development of the eastern peripheral areas such as Rajarhat, Salt Lake City, and EM Bypass. Infrastructural development of these areas as well as the proximity to Netaji Subhas Chandra Bose International Airport has encouraged the growth of the services industry including IT/ITeS, engineering, medical, and telecom sectors. Giants such as IBM and PwC have set up their offices in Sector V in Salt Lake City, which has boosted the demand for quality accommodation. With over seven million square feet of commercial space under construction in Rajarhat and Salt Lake, the eastern margin of the city seems to be poised on the threshold of developing as a self-sustaining micromarket for hotels.

The Kolkata hotel market witnessed double-digit growth in room supply in 2014-15, corresponding to a marginal decline in RevPAR, primarily due to a drop in overall occupancy. While the Commercial segment continues to lead the demand for hotels, the improving road and airline connectivity as well as large banqueting facilities prevalent in the city have led to a robust growth of the Meetings and Conferences segment.

[1] 2015 HVS Hotels in India Trends & Opportunities

The city remains one of the smallest branded hotel markets in the country with most of the demand being currently absorbed by the unorganised sector. With almost 2,000 rooms currently under development, the city is anticipated to double its branded room inventory over the next five years and, therefore, encourage a shift of demand for quality accommodation to the organised market. The increase in quality room supply may result in pressure on the occupancies and average rates in the near term, but we expect the market to gradually improve its performance over the long term.

Mumbai

Mumbai, commonly regarded as the financial capital of the country, recorded the highest occupancy and average rate across the country in the last fiscal.[2] In recent times, the Mumbai hotel market has evolved into three micromarkets, specifically South, Central and North Mumbai that operate fairly independently. In the last fiscal, all three micromarkets displayed an increase in occupancy and average rate across the board. The upward trend across the micromarkets was primarily due to the continuous addition and absorption of office stock within the respective areas that has further fuelled demand for hotels across market segments.

Recently, North Mumbai welcomed the city's second JW Marriott at the International Airport Terminal (T2) and the second Taj Hotel at the Domestic Airport Terminal, whereas Central Mumbai witnessed the entry of the country's first St. Regis at Lower Parel. In the long term, there is a likelihood of hotel developments at the Mumbai International Airport Limited (MIAL), Bandra-Kurla Complex, Kanjurgmarg, and Lower Parel. With the reduced pace of supply expected to enter the Mumbai market and the ongoing and planned improvements in the city’s infrastructure, our outlook for the Mumbai hotel market remains optimistic.

Pune

In the face of increasing demand and no new supply entering the branded hotel market in 2014-15, Pune saw a robust growth in occupancy. The year-to-date occupancy in 2015-16 has also recorded a steady increase over the previous year across all major micromarkets. What is commendable is that the citywide average rate year-to-date has also experienced a marginal growth, supported by increasing demand and slowdown in supply.

While growth in the recovering manufacturing sector has been relatively slow, demand from the IT/ITeS sector has recorded a sharp rise with Kharadi and Magarpatta contributing to the occupancy of hotels on the eastern side of the city and the expanding IT hub of Hinjewadi contributing to hotels on the western side. It may be noted that the increase in occupancy has occurred inspite of some new hotels opening including Formule 1, Hyatt Place, and The Gateway Hotel in Hinjewadi. Additionally, with over 19 million square feet of commercial office space under construction and reducing supply pressure, Pune hotels are likely to continue to build on room revenues in the near term. The Meetings and Conferences segment is also expected to grow as Pune benefits from its position as a popular choice for hosting weddings, events, and conferences in Western India.

Even though the relatively low food and beverage average per cover (APCs) and high energy costs pose challenges for hotels in the city, we believe that Pune will overall continue to grow into an important hotel market in the country with its large hotel base, presence of manufacturing and IT/ITeS sectors, and location at a convenient driving distance from Mumbai.

[2] 2015 HVS Hotels in India Trends & Opportunities

Twelve Other Cities

Agra

Agra, a traditional leisure destination owing to the presence of the Taj Mahal, Fatehpur Sikri and Agra Fort, and its consequent inclusion in the popular Golden Triangle travel itinerary (Delhi-Agra-Jaipur), has seen a transformation in its demand mix in recent years. The hotel market has witnessed a surge in Domestic visitation and has noted an increase in MICE demand as well. The reason for this change is two-fold: the opening of the Yamuna Expressway, which has eased connectivity to the city with Delhi-NCR; and, the introduction of hotels such as the Radisson, Wyndham Grand, Courtyard by Marriott, DoubleTree by Hilton, and Four Points by Sheraton that offer medium to large-scale meeting and event facilities.

Going forward, the state government is focusing on improving the city's infrastructure. Developments planned include beautifying the surroundings of the Taj by the Tajganj Project and easing connectivity both within the city and outside it by construction of the Outer Ring Road and Agra-Lucknow Expressway, respectively. The impending introduction of the Gatimaan Express (India's first semi-high speed train) promises to reduce travel time further between Delhi and Agra. We believe that once complete, these upgrades are likely to support the growth in demand for the city's hotels. On the supply front, the city is anticipated to witness an influx of hotels in the budget and mid-scale space. Although this is anticipated to cause some supply pressure in the near term, we believe that the improvement of infrastructure along with the introduction of branded hotel supply will aid in the all-round development of the city's hotel market.

Ahmedabad

Ahmedabad, which has witnessed steady demand growth over the past three years, saw a rise in occupancy in 2014-15 despite a double-digit increase in supply. This increase was attributed to the steady Commercial demand from the peripheral industrial areas and Meetings and Conferences demand, which was boosted by events such as Vibrant Gujarat and the PlastIndia Conference. The city has continued with this momentum in 2015-16, with demand from new factory (Honda and Suzuki) setups in Vithalapur underway and conferences like the recently concluded Esicon 2015.

With the opening of upscale hotels such as Crowne Plaza and Hyatt Regency offering large inventories and meeting spaces, we expect a number of regional and national level conferences to move to Ahmedabad.

On the supply front, the city is expected to witness limited hotel rooms entering the market in the short term with the refurbished Lemon Tree Premier and DoubleTree by Hilton as the only hotels presently under active development. With nominal supply expected to enter the market over the next three years, we expect Ahmedabad to consolidate its position as an important Commercial market and see a steady increase in occupancy and subsequently the average rates.

Gurgaon

Located in Haryana, Gurgaon is situated in the southeastern part of the state along the southwest border of Delhi. Over the years, Gurgaon has gained prominence as a key commercial and financial centre forming a major satellite city of the Delhi-NCR region with good accessibility to the Indira Gandhi International Airport.

While the Gurgaon hotel market has witnessed an increase in Meetings and Conferences and Extended Stay demand, its primary source still remains the Commercial demand generated mainly by the areas of Cyber City, Udyog Vihar, Golf Course Road, Mehrauli-Gurgaon Road (MG Road), and Manesar.

In the last fiscal, Gurgaon displayed a robust growth in occupancy albeit a correction in average rate, owing primarily to the supply increase in the budget and mid-market space. Additionally, the existing hotels in the city were still inclined towards the low-paying MICE and Group Leisure demand in order to maintain occupancies over lean periods.

Moving forward, rapid commercial development within areas such as Sohna Road, Golf Course Extension, Sector 82, Southern Peripheral Road, and Manesar are anticipated to relieve the congestion from the existing CBD (Cyber City, Udyog Vihar, and MG Road). This development coupled with improvements in infrastructure like the Rapid Metro and multi-lane expressways are expected to generate multiple demand generating areas for the hotel market. As opposed to the growing demand and emerging commercial micromarkets, the future supply in the city has slowed down, which leads us to an optimistic outlook for Gurgaon.

Hyderabad

Hyderabad has witnessed strong growth over the previous fiscal post the Telangana crisis, which had plagued business activity in the city over the past few years.[3] Hotels across the two main micromarkets, the traditional CBD and the New CBD (Gachibowli and Hitech City), have all recorded double-digit growth in demand. Average rates are also showing signs of revival as corporate travel and MICE demand have significantly picked up pace over last year.

The Hyderabad International Convention Centre (HICC), whose performance had dwindled in the recent past, has seen a complete turnaround in fortunes. Several large-scale international and national events, which had previously opted out of hosting conventions in the city owing to security concerns, have now found their way back onto the events calendar of the venue. In fact, the 2016 events calendar promises to be HICC's busiest since opening and should, therefore, translate into strong performances for the city's hotels.

Recently, several new properties have witnessed an opportunity to ramp-up their performance quickly owing to the slow addition of new hotels to the existing supply of the city. HVS estimates only 1,600 more rooms to be added to the city's supply over the next four-to-five years. This, along with a growth of events hosted at HICC as well as Commercial demand, leads us to forecast strong performances for the lodging market of the city.

Indore

Indore is the largest city in Madhya Pradesh and is commonly referred to as the commercial capital of the state. Located 190 km west of Bhopal, the state capital, it lies on the southern edge of the Malwa Plateau in an upland area on the banks of the Saraswati and Khan rivers.

Indore, in recent years, has experienced a growth of its services sector – primarily the IT/ITeS sector and industrial zones such as Pithampur Special Economic Zone (SEZ), Sanwer and Dewas owing to the rapid urbanisation along the Indore Bypass (Eastern Periphery). While there is a range of industries from pharmaceuticals to car and electrical companies in the city, traditionally, the city's economy has been fuelled by small and mid-scale business houses operating in the garment trading and textile sectors.

Though branded hotels have established their presence in the city, they face tough competition from reputed local hotels. Areas such as Siyaganj and Tukoganj are home to a lot of unbranded budget and economy hotels as they are situated in the vicinity of the railway station. Owing to this, business travellers primarily comprise the majority of guests for these hotels. Inspite of fairly low room rates, hotels have greatly benefitted from the F&B spaces especially banqueting (weddings and social events).

Jaipur

Jaipur forms a part of the famous Golden Triangle circuit (Delhi-Agra-Jaipur) and is one of the major attractions for foreign tourists visiting India. Historically, Jaipur has primarily been a leisure destination, attracting tourists to its forts, *havelis*, palaces, and other architectural marvels. This continues to be the main driver for room night demand in Jaipur. The city receives its Leisure demand primarily from various source markets such as the United States of America, the European countries (United Kingdom, France, Italy, Spain) and a few Asian countries, primarily Japan and China.

[3] 2015 HVS Hotels in India Trends & Opportunities

In addition to Leisure, the MICE segment has seen an upsurge in Jaipur. The city has become synonymous with the concept of 'Destination Weddings', which has further boosted hotel revenues over the past few years. It also receives significant Meetings and Conferences demand from markets such as Delhi and Mumbai. The expansion of Mahindra World City and the Jaipur Exhibition and Convention Centre (JECC), which commenced operations recently, is further predicted to increase the MICE segment.

Jaipur, over the past few years, has seen double digit growth in supply and a surge in demand from the low-paying domestic segment. This had led to price wars and rate cuts among all city hotels. However, with new supply pace slowing, the lodging market of Jaipur is finally witnessing increase in both occupancy and ARR. We anticipate these trends to continue in the near term, thereby resulting in a fairly stable marketwide performance for the city.

Kochi

Kochi, also known as the 'Queen of the Arabian Sea', is located in Ernakulam district in North Kerala. It is the biggest urban agglomeration in the state. Although Thiruvananthapuram remains the state capital, Kochi is regarded as the commercial capital of Kerala and is home to Cochin Stock Exchange, the only stock exchange in Kerala. Additionally, it is the centre of commercial activity revolving around spices, chemical industries, IT, health industries and banking, which are major sources of demand for the hotel market in Kochi. Major oil corporations like Bharat Petroleum, Hindustan Petroleum and Indian Oil Corporation have plants in Irumpanam, a suburb of Kochi. The city's economy is primarily driven by port related activities. The city has witnessed heavy investment in recent years, making it one of the fastest growing Tier-II cities in the country.

Kochi, being well connected to its neighbouring cities is a node in the North-South corridor of the National Highway system. Kochi also acts as the gateway city to the state's most popular tourism circuit comprising Marari, Alleppey, Kumarakom, Thekkady, and Munnar. Fort Kochi has various tourist attractions like beaches, temples, churches and museums. It is also a major contributor to the Leisure demand for the region.

Hotel demand in Kochi is mainly driven by import and export related activities, IT/ITeS industry, shipbuilding and the naval base; this concentrates the clientele mostly in the Commercial and Extended Stay segment.

Madurai

Located on the banks of the river Vaigai, in Tamil Nadu, Madurai has been inhabited for almost two millenia. It is currently a major city and the cultural headquarters of Tamil Nadu. Madurai is also one of the major centres for the production of rubber and rubber-related goods in the country. Fuelled by industries such as TVS, Fenner India, General Motors, Ford and Honda, the city has quite a healthy Commercial demand for hotels. Madurai is coming up as an IT hub with development of IT parks and SEZs; Honeywell is one such big IT company based here.

The Leisure segment also makes a significant contribution to the city hotels' demand pie. Madurai is home to various temples like the Meenakshi Amman Temple, Koodal Azhagar Temple and Thirumalai Nayak Palace among others. In addition, it is also the centre for many festivals held in Tamil Nadu, generating most of the Leisure demand.

The presence of many Ayurvedic centres lends to medical tourism, though it is smaller in comparison to other cities in India; however, the demand from medical tourism is marginal, as compared to the Commercial and Leisure segments.

Thus, the primary demand is from three segments: Domestic Business, Tourists (both foreign and domestic) and Tour Groups (domestic and foreign).

Mysore

Mysore, the second-largest city in Karnataka, is situated to the south of the state and is also its cultural capital. Tourism and varied industries are the major demand generators for room nights in the city. While industrial areas in Mysore are concentrated towards the northwest and south, tourist attractions/locations are spread in and around the city. Bengaluru, situated 140 km away, is also a key demand generating area for Mysore hotels/resorts.

As a typical tourist destination, Mysore's hotel market witnesses seasonality. While October to December and March to June are generally the peak seasons, the Dussehra festivities in October attract the maximum tourists. However, the lean tourist season in-between is balanced by Commercial demand generated by the industrial areas in the city and the weekend visitations to the city by travellers from Bengaluru and other neighbouring areas.

Currently, the city's 700-room branded hotel supply tracked by HVS comprises of hotels across the mid-market, budget, and economy hotel segments. Additionally, due to limited future supply set to enter the market over the next few years, HVS predicts steady performance for the lodging market of Mysore.

Nashik

Nashik, also known as the 'Wine Capital of India', is located at the foothills of the Western Ghats on the banks of the Godavari and is the fourth-largest city in Maharashtra. Nashik's economy is primarily driven by agriculture, owing to the favourable climate for growing table grapes. Taking advantage of this, liquor manufacturing factories such as Pernod-Ricard, United Spirits, and Sula Vineyards have their setups here and subsequently play an integral role in its economy. Wineries like the Sula Vineyards are also responsible for a portion of the Leisure travel to Nashik since they are open to visitors and even host annual events. Nashik reports demand from the Commercial segment being home to a few reputed MNCs such as Mahindra & Mahindra, Bosch, ABB, Crompton Greaves and Siemens.

Nashik is an ancient city and considered holy with its temples, the Godavari River (also known as the Ganga of the South), Panchvati (the site of Lord Rama's stay in the forest) and other attractions that hold unique religious significance. Nashik also hosts the famous Kumbh Mela, one of the largest religious gatherings in the world. This event attracts a multitude of domestic travellers.

Thus, hotel demand in Nashik is mainly driven by wine enthusiasts, MNCs, and religious travellers who comprise the Commercial and Leisure segments.

Thiruvananthapuram

The capital city of Kerala, Thiruvananthapuram or Trivandrum, is located at the southern end of the state. The city is well connected to key cities in the south namely Bengaluru, Chennai, and Kochi.

The city's economy is driven by leisure tourism, medical tourism, PSUs, and the IT/ITeS segment. The presence of globally renowned companies such as Ernst & Young, TCS, HCL, Infosys, and Oracle Corporation translates into Commercial demand for the hotel industry. Thiruvananthapuram is also of strategic importance to the Indian Airforce, Indian Space Research Organization (ISRO), and some international airline companies, which operate in the Southeast-Asian Region.

The presence of Ayurvedic centres across the city contributes to medical tourism while that of natural attractions contributes to the Leisure demand. Kovalam beach, Sanghumukham beach, Neyyar Wildlife Sanctuary and the Agasthyarkoodam peak are just some attractions.

The branded hotel segment has the potential to expand due to growing tourism in the region. The proposed hotel supply is expected to double the size of the market in terms of hotel rooms in the next couple of years.

Udaipur

Udaipur, with a plethora of local attractions of historical and cultural significance, remains one of the leading tourist destinations in the country. The small city, located at the base of the Aravalli Hills in Rajasthan, attracts domestic as well as international travellers on account of its rich heritage and natural beauty. A part of the 'Mewar Tourism Circuit' and the 'Palace Tourism Circuit', the city enjoys good rail connectivity with the rest of the state and country falling on the routes of luxury trains such as 'Palace on Wheels' and 'Royal Rajasthan on Wheels'. Furthermore, the addition of Indigo flights from Delhi and Mumbai in 2015 point towards an increase in air travel and growth in visitation to the city. Given the road connectivity via NH-8, Udaipur has over the years played host to a growing number of domestic tourists, especially in the summer months and over the weekends.

With regard to hotel performance, the hotels in the Luxury segment continue to thrive in terms of both occupancies and average rates. Moreover, due to the burgeoning middle class, the upscale and mid-scale hotels have witnessed a steady increase in occupancy, albeit with correspondingly muted average rates. While the Leisure segment is the primary demand generator for hotels, the city's reputation as a wedding destination as well as a suitable location for small conferences and commercial events has resulted in the growth of the Meetings and Conferences demand.

Given the subdued anticipated supply tracked for the next five years and the small base of existing quality accommodation, Udaipur presents excellent opportunities for investment in the mid-scale space.

1. Indian Hotel Industry – Star Category

Introduction

This section presents the results of the performance of the hotels analysed according to the star classification of the hotels participating in the Survey. An overall total of 1,358 hotels (Table 1-1) participated in the Survey for 2014-15. The hotels have been classified into the eight star categories applicable in India.

To provide further comparisons, we have included a column for All-India averages across all star categories. Each section includes the total number of respondents for each component of the Survey, allowing the reader to judge the validity of the data received. All data pertains to 2014-15 (April-March), and monetary figures are in Indian rupees (₹).

Trends

- **Expense Analysis:** Rooms Expenses and Minor Operated Expenses have risen on an All-India basis in comparison to 2013-14 by 5.9% and 15.6%, respectively. This year's Survey also reveals an increase in Administrative and General Expenses across all star categories with the exception of the Five-Star one. The greatest impact of the increase in expenditure is among 'Other hotels' followed by Four-Star hotels, which registered an increase of 80.4% and 33.6%, respectively over that in 2013-14.

- **Modes of Marketing:** While the change in Marketing Expense from last year is negligible, the mode of marketing reflects the dynamism in technology that is visible in society today. The data seems to reflect that marketing efforts on the whole have grown; however, traditional modes such as telemarketing, outdoor advertising, direct mail, and TV advertising have gone down with the last two seeing a drastic decline amongst most star categories. Hotels across star categories are building their brands through loyalty programmes and merchandising, both of which have been reported at a higher percentage than last year with the exception of Heritage hotels and 'Other Hotels'.

- **Tourism Dynamics:** This year's Survey indicates a slight increase in domestic guest visitation among all categories of hotels with the exception of the Five-Star hotels. The data further indicates an All-India growth in demand from Domestic Leisure across all categories of hotels as compared to 2013-14. Business travel, on the other hand, seems to have slumped reportedly among both domestic and foreign business travellers. While foreign guests from the Association of South East Asian Nations (ASEAN) and South Asian Association for Regional Cooperation (SAARC), France and Other European countries have declined as compared to last year, guests visiting from the Caribbean and UK have reportedly increased.

TABLE 1-1: Indian Hotel Industry – Star Category: Facilities Analysis and Staffing

Typical Room Profile of an Average Hotel

COMPOSITION		Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses		*60*	*64*	*137*	*474*	*233*	*88*	*55*	*247*	*1,358*
Air-Conditioned	Rooms	182.4	121.8	86.4	49.0	29.3	17.4	23.5	24.7	51.2
	Suites	18.2	11.0	9.5	4.9	3.0	3.7	7.6	2.9	5.6
Non-Air-Conditioned	Rooms	0.3	1.4	1.4	3.8	6.8	7.9	2.4	6.0	4.4
	Suites	0.0	0.1	0.2	0.5	0.9	0.4	0.9	1.0	0.7
Total average rooms		**200.9**	**134.2**	**97.4**	**58.2**	**39.9**	**29.4**	**34.3**	**34.6**	**61.9**

* The number of non-air-conditioned rooms in lower star category hotels appears to be higher, partly because many are located in hill stations where air-conditioning is not provided in hotels.

Average Number of Food & Beverage Outlets Per Hotel

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*56*	*60*	*126*	*429*	*192*	*64*	*50*	*15*	*992*
Restaurant	3.3	2.6	1.9	1.6	1.5	1.2	1.6	1.2	**1.7**
Bars	1.5	1.2	1.1	0.8	0.5	0.4	0.8	0.7	**0.8**
Others	0.7	0.5	0.9	0.6	0.2	0.3	0.4	0.5	**0.5**
Total	**5.4**	**4.3**	**3.8**	**2.9**	**2.3**	**2.0**	**2.8**	**2.5**	**3.1**

Average Number of Employees Per Hotel (Permanent / Contract / Full Time / Part Time)

COMPOSITION		Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses		*57*	*58*	*116*	*428*	*206*	*76*	*47*	*173*	*1,161*
Managers	Male	49.3	26.8	15.7	7.1	2.9	2.5	5.3	2.9	9.3
	Female	12.1	5.3	2.3	0.9	0.4	1.6	0.3	0.3	1.6
Supervisors	Male	60.5	36.9	22.1	9.7	4.6	2.9	9.1	3.8	12.5
	Female	10.3	5.6	2.5	1.3	0.8	0.5	0.5	0.5	1.8
Staff	Male	233.0	143.1	98.1	60.1	30.6	19.8	45.4	26.3	63.0
	Female	31.8	16.9	10.5	7.2	3.6	2.2	2.5	2.9	7.4
Total		**397.0**	**234.5**	**151.2**	**86.2**	**42.9**	**29.4**	**63.1**	**36.8**	**95.7**
Avg. Employees / Room		2.2	1.8	1.8	1.7	1.2	1.1	1.8	1.1	1.5

Average Percentage of Trained Employees Per Hotel

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*51*	*54*	*107*	*344*	*138*	*49*	*33*	*111*	*887*
Managers	99.6	96.7	91.2	88.4	86.7	86.8	90.3	81.3	**90.1**
Supervisors	97.0	98.9	88.7	85.0	80.3	74.5	94.6	80.0	**87.4**
Staff	79.1	84.6	75.5	67.0	63.8	55.1	74.3	65.7	**70.7**
Total Avg. Trained Employees*	**91.9**	**93.4**	**85.2**	**80.1**	**77.0**	**72.2**	**86.4**	**75.7**	**82.7**
Total Avg. Un-Trained Employees	**8.1**	**6.6**	**14.9**	**19.9**	**23.0**	**27.9**	**13.6**	**24.3**	**17.3**

* Trained Employees includes those with a minimum one-year certificate course from a hotel management or equivalent institution; however, some hotels may have included those with short term (in-house) training.

TABLE 1-2: Indian Hotel Industry – Star Category: Financial Report – Percentage of Revenue (2014-2015)

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*52*	*43*	*65*	*225*	*92*	*41*	*22*	*22*	*562*
Average Total Rooms Per Hotel:	**202**	**138**	**104**	**63**	**37**	**31**	**41**	**30**	**78**
Average Occupied Rooms Per Hotel:	**49,872**	**31,290**	**23,239**	**13,603**	**7,901**	**6,423**	**6,645**	**6,621**	**17,424**
Average Occupancy Per Hotel:	**68.1%**	**65.6%**	**64.8%**	**60.4%**	**60.0%**	**61.0%**	**42.4%**	**60.7%**	**61.3%**
Average Rate Per Hotel (₹):	**8,222**	**5,640**	**4,021**	**2,977**	**2,056**	**1,475**	**3,691**	**2,558**	**4,789**
REVENUE									
Rooms	49.0%	53.4%	57.1%	49.7%	53.2%	61.8%	41.1%	52.1%	**50.9%**
Food & Beverage	31.0	27.6	26.4	35.2	36.4	23.3	40.1	36.8	**31.0**
Banquets & Conferences	12.7	13.3	11.1	8.7	5.2	11.1	12.0	5.5	**11.5**
Telephone & Other	0.5	0.2	0.4	0.1	0.3	0.2	0.0	0.1	**0.3**
Minor Operated*	4.4	3.4	2.1	2.0	1.0	1.1	1.0	1.6	**3.3**
Rental & Other Income	2.5	2.2	3.0	4.3	3.9	2.6	5.9	4.0	**3.0**
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	**100.0**
DEPARTMENTAL EXPENSES									
Rooms	22.0	20.6	21.2	22.3	28.3	25.7	22.6	18.4	**21.9**
Food & Beverage	45.2	57.6	61.5	61.3	69.3	68.7	49.7	61.3	**53.0**
Telephone & Other	73.0	107.9	53.1	220.9	144.8	362.0	1,125.3	199.3	**88.1**
Minor Operated*	65.1	65.8	112.6	78.3	141.1	116.8	102.4	56.4	**71.2**
Rental & Other Income	10.2	3.4	7.7	8.1	11.2	19.4	11.6	12.3	**8.7**
Total	33.9	37.0	37.9	40.1	46.2	42.0	37.1	37.1	**36.6**
DEPARTMENTAL INCOME	66.1	63.0	62.1	59.9	53.8	58.0	62.9	62.9	**63.4**
OPERATING EXPENSES									
Administrative & General	9.1	10.0	11.4	9.2	9.0	6.5	10.6	14.1	**9.6**
Management Fee	2.2	2.7	1.9	1.8	1.9	1.9	2.7	1.5	**2.1**
Marketing	3.7	4.2	3.0	2.1	1.7	3.7	3.1	1.6	**3.3**
Franchise Fees	0.1	0.2	0.4	0.3	0.0	0.5	0.2	0.0	**0.2**
Property Operations & Maintenance	4.9	6.7	5.3	5.0	3.7	4.3	6.5	4.2	**5.2**
Energy	8.7	11.1	12.1	11.6	10.9	12.2	10.4	9.3	**10.1**
Total	28.6	35.1	34.1	29.9	27.1	29.1	33.5	30.7	**30.5**
HOUSE PROFIT	37.5	27.9	28.0	29.9	26.7	28.9	29.5	32.2	**32.9**
FIXED EXPENSES									
Property Taxes	1.2	0.7	1.2	0.8	1.0	1.8	0.7	0.5	**1.0**
Insurance	0.3	0.3	0.3	0.3	0.3	0.4	0.2	0.3	**0.3**
Other Fixed Charges	2.8	0.5	0.9	0.7	0.9	1.3	0.8	0.2	**1.7**
Rent	1.1	0.3	0.4	1.2	0.6	3.9	2.2	4.9	**1.0**
Total	5.3	1.9	2.8	3.0	2.8	7.3	3.9	5.9	**3.9**
NET INCOME**	32.2%	26.0%	25.3%	27.0%	24.0%	21.6%	25.6%	26.3%	**28.9%**

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth

** Net Income is before depreciation, interest payments and taxes

TABLE 1-3: Indian Hotel Industry – Star Category: Financial Report – Amount Per Available Room (2014-2015)

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*52*	*43*	*65*	*225*	*92*	*41*	*22*	*22*	*562*
Average Total Rooms Per Hotel:	**202**	**138**	**104**	**63**	**37**	**31**	**41**	**30**	**78**
Average Occupied Rooms Per Hotel:	**49,872**	**31,290**	**23,239**	**13,603**	**7,901**	**6,423**	**6,645**	**6,621**	**17,424**
Average Occupancy Per Hotel:	**68.1%**	**65.6%**	**64.8%**	**60.4%**	**60.0%**	**61.0%**	**42.4%**	**60.7%**	**61.3%**
Average Rate Per Hotel (₹)	**8,222**	**5,640**	**4,021**	**2,977**	**2,056**	**1,475**	**3,691**	**2,558**	**4,789**
REVENUE (₹)									
Rooms	20,30,827	12,75,740	9,00,298	6,38,311	4,37,174	3,03,310	5,96,227	5,64,419	**10,72,198**
Food & Beverage	12,83,456	6,59,016	4,16,433	4,52,178	2,99,052	1,14,345	5,82,315	3,98,445	**6,54,374**
Banquets & Conferences	5,26,938	3,19,027	1,74,549	1,12,310	42,860	54,347	1,73,818	59,723	**2,42,917**
Telephone & Other	19,810	4,425	6,051	1,450	2,470	956	385	1,508	**7,016**
Minor Operated*	1,81,174	80,948	32,770	25,186	8,533	5,246	13,808	16,808	**69,140**
Rental & Other Income	1,02,256	52,245	46,446	55,736	31,839	12,566	85,223	42,795	**62,279**
Total	41,44,461	23,91,400	15,76,546	12,85,172	8,21,929	4,90,770	14,51,775	10,83,699	**21,07,924**
DEPARTMENTAL EXPENSES (₹)									
Rooms	4,45,746	2,62,976	1,90,543	1,42,324	1,23,549	78,031	1,34,771	1,03,561	**2,34,921**
Food & Beverage	8,17,724	5,62,945	3,63,167	3,46,042	2,36,793	1,15,876	3,75,407	2,80,874	**4,75,762**
Telephone & Other	14,469	4,772	3,212	3,202	3,578	3,460	4,330	3,006	**6,179**
Minor Operated*	1,17,907	53,270	36,895	19,716	12,042	6,127	14,137	9,478	**49,234**
Rental & Other Income	10,474	1,751	3,571	4,492	3,554	2,443	9,846	5,256	**5,402**
Total	14,06,322	8,85,714	5,97,387	5,15,776	3,79,516	2,05,937	5,38,491	4,02,175	**7,71,499**
DEPARTMENTAL INCOME (₹)	27,38,140	15,05,687	9,79,159	7,69,396	4,42,413	2,84,833	9,13,284	6,81,524	**13,36,425**
OPERATING EXPENSES (₹)									
Administrative & General	3,77,566	2,40,128	1,79,910	1,18,708	74,165	32,054	1,53,863	1,52,500	**2,02,024**
Management Fee	89,031	64,300	30,148	22,849	15,262	9,443	39,295	16,546	**44,760**
Marketing	1,54,946	1,01,389	46,565	26,479	13,933	18,292	44,267	17,120	**69,613**
Franchise Fees	4,364	5,405	6,297	3,860	201	2,459	2,819	-	**4,160**
Property Operations & Maintenance	2,01,417	1,61,221	83,744	63,955	30,001	21,052	94,876	45,809	**1,09,692**
Energy	3,58,323	2,66,380	1,90,558	1,48,827	89,317	59,693	1,50,662	1,01,045	**2,13,600**
Total	11,85,648	8,38,823	5,37,223	3,84,677	2,22,878	1,42,993	4,85,782	3,33,020	**6,43,850**
HOUSE PROFIT (₹)	15,52,492	6,66,864	4,41,935	3,84,719	2,19,536	1,41,840	4,27,501	3,48,504	**6,92,575**
FIXED EXPENSES (₹)									
Property Taxes	49,745	17,795	18,726	9,853	8,081	8,749	9,903	5,130	**21,638**
Insurance	10,925	7,793	4,187	3,760	2,160	1,732	3,389	2,935	**5,890**
Other Fixed Charges	1,14,645	12,096	14,730	9,186	7,569	6,336	11,636	2,215	**35,490**
Rent	43,891	8,074	6,223	15,566	4,822	19,010	31,212	53,341	**20,061**
Total	2,19,207	45,758	43,866	38,365	22,632	35,826	56,140	63,621	**83,078**
NET INCOME (₹)**	13,33,285	6,21,106	3,98,069	3,46,354	1,96,903	1,06,013	3,71,361	2,84,883	**6,09,497**

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth

** Net Income is before depreciation, interest payments and taxes

TABLE 1-4: Indian Hotel Industry – Star Category: Financial Report – Amount Per Occupied Room (2014-2015)

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	***52***	***43***	***65***	***225***	***92***	***41***	***22***	***22***	***562***
Average Total Rooms Per Hotel:	**202**	**138**	**104**	**63**	**37**	**31**	**41**	**30**	**78**
Average Occupied Rooms Per Hotel:	**49,872**	**31,290**	**23,239**	**13,603**	**7,901**	**6,423**	**6,645**	**6,621**	**17,424**
Average Occupancy Per Hotel:	**68.1%**	**65.6%**	**64.8%**	**60.4%**	**60.0%**	**61.0%**	**42.4%**	**60.7%**	**61.3%**
Average Rate Per Hotel (₹):	**8,222**	**5,640**	**4,021**	**2,977**	**2,056**	**1,475**	**3,691**	**2,558**	**4,789**
REVENUE (₹)									
Rooms	8,222	5,640	4,021	2,977	2,056	1,475	3,691	2,558	**4,789**
Food & Beverage	5,196	2,913	1,860	2,109	1,406	556	3,605	1,805	**2,923**
Banquets & Conferences	2,133	1,410	780	524	202	264	1,076	271	**1,085**
Telephone & Other	80	20	27	7	12	5	2	7	**31**
Minor Operated*	733	358	146	117	40	26	85	76	**309**
Rental & Other Income	414	231	207	260	150	61	528	194	**278**
Total	16,778	10,572	7,042	5,994	3,865	2,387	8,987	4,911	**9,414**
DEPARTMENTAL EXPENSES (₹)									
Rooms	1,805	1,163	851	664	581	380	834	469	**1,049**
Food & Beverage	3,310	2,489	1,622	1,614	1,113	564	2,324	1,273	**2,125**
Telephone & Other	59	21	14	15	17	17	27	14	**28**
Minor Operated*	477	235	165	92	57	30	88	43	**220**
Rental & Other Income	42	8	16	21	17	12	61	24	**24**
Total	5,693	3,915	2,668	2,406	1,785	1,002	3,333	1,822	**3,446**
DEPARTMENTAL INCOME (₹)	11,085	6,656	4,374	3,589	2,080	1,386	5,653	3,088	**5,969**
OPERATING EXPENSES (₹)									
Administrative & General	1,529	1,062	804	554	349	156	952	691	**902**
Management Fee	360	284	135	107	72	46	243	75	**200**
Marketing	627	448	208	124	66	89	274	78	**311**
Franchise Fees	18	24	28	18	1	12	17	-	**19**
Property Operations & Maintenance	815	713	374	298	141	102	587	208	**490**
Energy	1,451	1,178	851	694	420	290	933	458	**954**
Total	4,800	3,708	2,400	1,794	1,048	696	3,007	1,509	**2,876**
HOUSE PROFIT (₹)	6,285	2,948	1,974	1,794	1,032	690	2,646	1,579	**3,093**
FIXED EXPENSES (₹)									
Property Taxes	201	79	84	46	38	43	61	23	**97**
Insurance	44	34	19	18	10	8	21	13	**26**
Other Fixed Charges	464	53	66	43	36	31	72	10	**159**
Rent	178	36	28	73	23	92	193	242	**90**
Total	887	202	196	179	106	174	348	288	**371**
NET INCOME (₹)**	5,398	2,746	1,778	1,615	926	516	2,299	1,291	**2,722**

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth
** Net Income is before depreciation, interest payments and taxes

TABLE 1-5: Indian Hotel Industry – Star Category: Market Data

Market Segmentation

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*48*	*48*	*104*	*346*	*180*	*61*	*47*	*98*	*932*
Airline Crew	3.8%	2.6%	1.5%	0.8%	0.8%	0.2%	0.2%	0.6%	**1.0%**
Business Traveller - Domestic	15.4	24.2	33.7	34.3	36.0	39.7	13.2	36.3	**32.7**
Business Traveller - Foreign	17.5	18.1	12.8	8.2	8.4	6.1	6.3	9.6	**9.8**
Complimentary Rooms	2.3	1.7	1.7	1.9	2.0	1.6	3.2	1.5	**1.9**
Tourists/Leisure FIT - Domestic	19.5	14.7	14.6	22.1	23.1	25.1	29.6	24.6	**21.7**
Tourists/Leisure FIT - Foreign	10.5	9.2	8.1	6.5	5.9	6.5	19.1	6.0	**7.4**
Meeting Participants (Less than 100 Attendees)	7.0	5.5	4.2	4.5	3.9	3.6	2.5	2.5	**4.2**
Meeting Participants (Over 100 Attendees)	9.5	10.7	8.2	7.7	5.4	3.5	2.2	5.2	**6.8**
Tour Groups - Domestic	3.7	3.4	6.4	7.3	9.1	7.7	6.7	8.0	**7.2**
Tour Groups - Foreign	6.1	6.3	5.4	3.8	2.2	2.6	10.1	3.0	**4.0**
Other	4.7	3.6	3.5	3.0	3.3	3.4	7.1	3.0	**3.4**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Guest Analysis

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*53*	*59*	*113*	*367*	*180*	*60*	*44*	*121*	*997*
Domestic Guests	56.6%	62.2%	69.9%	79.6%	82.3%	82.6%	62.5%	81.1%	**76.3%**
Foreign Guests	43.4	37.9	30.1	20.4	17.7	17.4	37.5	18.9	**23.7**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Total Business Guests	58.5%	63.9%	63.7%	59.8%	55.8%	54.5%	33.5%	58.8%	**58.1%**
Total Leisure Guests	41.5	36.1	36.3	40.2	44.2	45.5	66.5	41.2	**41.9**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Avg. Stay of Foreign Guests (Days)	2.8	3.6	4.0	3.1	2.2	2.1	1.9	2.4	**2.9**
Avg. Stay of Domestic Guests (Days)	2.2	2.3	2.5	2.7	2.3	2.4	2.0	2.6	**2.5**
Avg. Stay of Business Guests (Days)	2.1	2.1	2.5	2.6	2.6	1.9	2.0	2.6	**2.4**
Avg. Stay of Leisure Guests (Days)	2.2	1.8	2.1	2.2	2.1	2.0	2.3	2.3	**2.1**
Percentage of Repeat Guests	33.8%	30.9%	42.8%	24.7%	48.5%	42.6%	32.6%	48.7%	**44.2%**

Country of Origin of Guests

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*49*	*54*	*82*	*250*	*107*	*31*	*34*	*47*	*654*
ASEAN*	5.3%	3.2%	5.8%	7.6%	8.5%	6.2%	1.8%	4.0%	**6.4%**
Australia	3.2	2.7	4.0	3.0	3.9	3.9	6.1	4.4	**3.6**
Canada	3.0	1.9	3.0	2.8	4.5	2.9	3.1	3.5	**3.1**
Caribbean	2.0	0.4	1.6	1.0	2.2	1.4	0.4	0.5	**1.2**
China	2.0	3.9	5.6	6.3	6.7	5.3	1.1	6.1	**5.4**
France	3.6	2.9	4.8	5.2	4.7	6.4	19.1	7.8	**5.7**
Germany	3.1	4.0	5.6	5.5	5.0	5.6	9.3	8.8	**5.6**
Japan	4.6	7.1	6.8	4.8	3.9	2.5	2.8	3.9	**4.8**
Middle East	4.1	5.6	5.7	6.4	5.3	11.4	1.3	5.5	**5.8**
Other European Nations	5.2	6.9	5.3	6.9	6.5	6.4	8.4	5.0	**6.4**
Russia	2.9	4.4	5.8	3.8	3.1	5.7	0.4	1.3	**3.6**
SAARC **	5.6	4.3	3.7	7.1	9.0	8.5	3.0	7.3	**6.5**
South Africa	1.1	1.3	5.4	3.1	2.3	3.2	0.7	1.5	**2.7**
UK	10.7	9.9	12.9	11.2	13.6	10.5	21.7	14.8	**12.4**
USA	14.1	11.2	12.3	10.7	10.0	7.4	10.0	11.9	**11.0**
Other	29.6	30.3	11.8	14.6	10.9	12.7	10.9	13.8	**15.7**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

* ASEAN: Association of South East Asian Nations - Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam, Laos, Cambodia, Brunei Darussalam
** SAARC: South Asian Association for Regional Co-operation - India, Pakistan, Bangladesh, Sri Lanka, Nepal, Bhutan, Maldives

TABLE 1-6: Indian Hotel Industry – Star Category: Monthly and Daily Occupancy

Average Monthly Occupancy

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*54*	*60*	*110*	*362*	*171*	*56*	*43*	*96*	*952*
January	70.7%	64.1%	66.4%	61.5%	59.7%	60.9%	55.7%	56.9%	**61.6%**
February	78.7	72.6	69.8	62.6	58.0	58.8	59.9	58.4	**63.4**
March	68.5	63.6	61.4	56.7	54.9	55.2	52.0	54.4	**57.5**
April	66.7	60.5	61.1	55.6	55.9	57.6	45.6	55.4	**56.9**
May	61.9	56.9	60.3	58.2	60.3	58.6	38.9	60.3	**58.3**
June	61.6	56.4	57.7	55.1	57.2	54.6	36.0	60.9	**55.9**
July	60.5	54.8	55.5	51.8	51.4	49.5	35.6	52.7	**52.1**
August	64.0	56.8	57.3	53.3	51.2	52.8	41.4	51.9	**53.5**
September	67.4	58.3	60.8	54.3	52.0	54.1	38.1	54.0	**54.9**
October	66.2	58.0	60.3	57.2	58.4	63.6	53.2	59.0	**58.7**
November	73.9	69.0	69.0	63.5	63.0	64.8	56.0	62.6	**64.6**
December	71.4	65.9	70.4	66.3	65.9	68.0	58.3	64.5	**66.5**

Average Daily Occupancy

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*52*	*56*	*101*	*326*	*155*	*57*	*34*	*89*	*870*
Monday	64.5%	55.4%	62.4%	50.8%	49.9%	53.3%	37.3%	54.5%	**53.1%**
Tuesday	66.1	57.2	65.1	53.4	53.0	54.2	39.0	55.9	**55.4**
Wednesday	67.7	59.4	66.0	57.0	53.8	57.3	42.1	56.7	**57.7**
Thursday	67.1	60.2	63.4	57.2	54.6	56.4	42.7	57.6	**57.7**
Friday	65.7	57.9	60.3	57.2	58.1	57.3	51.3	61.0	**58.4**
Saturday	63.9	53.1	57.2	53.6	56.3	57.4	54.4	52.5	**55.3**
Sunday	59.1	48.1	53.8	45.4	47.5	53.4	44.9	43.0	**48.0**

TABLE 1-7: Indian Hotel Industry – Star Category: Sources of Reservations

Source of Advance Reservations

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*49*	*49*	*103*	*340*	*169*	*54*	*43*	*89*	*896*
Chain CRS (Central Reservations System)	9.0%	12.3%	5.3%	4.1%	1.7%	1.5%	6.6%	2.0%	**4.3%**
Direct Enquiry / Hotel Representative	35.5	40.0	40.6	43.7	45.6	51.5	32.7	47.0	**43.3**
Global Distribution System (GDS)	7.3	6.1	3.4	1.5	0.9	0.8	2.0	0.7	**2.1**
Hotel / Chain Website	6.6	4.9	7.6	8.1	9.3	7.5	8.4	8.5	**8.0**
Travel Agent & Tour Operator	14.1	13.5	17.2	17.5	20.4	15.2	32.7	22.5	**18.6**
Online Reservations Systems	8.0	6.8	9.1	9.0	9.6	7.6	8.1	6.5	**8.5**
Regional Sales Office	14.9	10.4	10.9	8.1	4.2	5.8	5.0	2.7	**7.4**
Other	4.8	5.9	6.0	8.1	8.4	10.1	4.5	10.2	**7.8**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

TABLE 1-8: Indian Hotel Industry – Star Category: Marketing Media

Marketing Media – Percentage of Hotels Using Each Media

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*53*	*60*	*107*	*351*	*176*	*60*	*40*	*99*	*946*
Consumer Central Media	50.9%	40.0%	33.6%	22.8%	10.2%	3.3%	20.0%	10.1%	**21.7%**
Direct Mail	86.8	78.3	86.0	82.3	74.4	63.3	80.0	72.7	**79.0**
Hotel Website	100.0	98.3	94.4	90.3	79.0	70.0	87.5	79.8	**87.2**
Loyalty Card Programme	90.6	80.0	58.9	40.2	19.9	21.7	30.0	18.2	**40.0**
Merchandising	47.2	38.3	38.3	29.6	22.7	18.3	37.5	20.2	**29.5**
Other Internet Sites	92.5	90.0	72.9	64.4	49.4	41.7	50.0	46.5	**61.8**
Outdoor Advertising	64.2	73.3	63.6	65.5	51.1	50.0	52.5	39.4	**58.8**
Pay Per Click	47.2	30.0	21.5	16.8	9.7	11.7	10.0	12.1	**17.4**
Print Advertising	94.3	93.3	81.3	82.3	80.1	76.7	72.5	71.7	**81.3**
Promotions	92.5	86.7	87.9	72.4	60.2	45.0	62.5	50.5	**69.5**
Radio Advertising	56.6	40.0	32.7	23.7	13.1	11.7	5.0	10.1	**22.6**
Telemarketing	54.7	58.3	59.8	53.9	43.2	28.3	42.5	35.4	**48.8**
TV Advertising	37.7	21.7	23.4	21.9	16.5	10.0	35.0	12.1	**20.7**
Viral Marketing	39.6	16.7	22.4	16.8	6.8	6.7	20.0	8.1	**15.4**

TABLE 1-9: Indian Hotel Industry – Star Category: Payment Methods

Payment Methods Used

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*45*	*51*	*98*	*308*	*164*	*53*	*38*	*84*	*841*
Cash Sales	17.7%	16.5%	21.9%	31.9%	44.7%	57.6%	31.1%	48.3%	**34.7%**
Credit Card Sales	44.6	43.9	38.9	35.9	30.7	25.6	27.8	28.7	**34.4**
Credit Sales (Other Than Cards)	25.0	30.7	26.7	19.8	13.6	7.9	30.0	10.8	**19.2**
Electronic Fund Transfer	12.8	9.0	12.5	12.4	11.1	8.9	11.2	12.2	**11.7**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Credit Cards Used

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*48*	*52*	*96*	*285*	*137*	*39*	*37*	*72*	*766*
American Express	28.6%	21.1%	12.3%	7.8%	3.8%	4.3%	5.8%	5.4%	**9.3%**
Diners Club	1.0	2.5	1.8	1.6	2.1	2.8	0.2	1.9	**1.8**
Mastercard / Eurocard	31.3	38.2	39.7	40.3	42.2	35.8	38.9	38.0	**39.3**
Visa	36.2	35.9	40.9	45.6	46.2	51.1	49.3	50.6	**44.9**
Other	3.0	2.2	5.2	4.8	5.8	5.9	5.9	4.1	**4.8**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Average Credit Card Commission

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*43*	*41*	*77*	*201*	*88*	*29*	*21*	*28*	*528*
American Express	3.2%	3.4%	3.3%	2.6%	1.7%	1.7%	2.9%	1.8%	**2.6%**
Diners Club	1.1	1.1	0.7	0.4	0.4	0.6	0.4	0.2	**0.6**
Mastercard / Eurocard	1.2	1.1	1.3	1.9	1.7	1.7	1.4	1.6	**1.6**
Visa	1.2	1.1	1.4	1.9	1.6	1.7	1.4	1.5	**1.6**
Other	0.1	0.1	0.3	0.2	0.2	0.3	0.0	0.6	**0.2**

TABLE 1-10: Indian Hotel Industry – Star Category: Technology Management Practices

Technology in Hotels – Percentage of Hotels Using Each Technology

COMPOSITION	Five-Star Deluxe	Five-Star	Four-Star	Three-Star	Two-Star	One-Star	Heritage	Others	2014-2015 All-India Average
Number of Responses	*41*	*54*	*99*	*337*	*156*	*52*	*36*	*90*	*865*
Accounting System	92.7%	96.3%	87.9%	94.1%	88.5%	82.7%	83.3%	80.0%	**89.8**%
Call Accounting System	75.6	72.2	60.6	48.1	33.3	30.8	38.9	24.4	**45.8**
Central Reservations System (CRS)	68.3	74.1	51.5	43.0	23.7	11.5	58.3	22.2	**40.2**
Electronic Keycard	82.9	87.0	69.7	55.2	23.1	21.2	13.9	36.7	**48.7**
Energy Management System	48.8	50.0	50.5	32.3	15.4	15.4	25.0	11.1	**29.7**
Internet / E-Mail	85.4	96.3	97.0	94.7	90.4	94.2	97.2	92.2	**93.6**
Internet / Website	87.8	94.4	89.9	91.4	87.2	75.0	91.7	81.1	**88.4**
Intranet System	70.7	63.0	52.5	47.5	39.7	36.5	63.9	36.7	**47.6**
Local Area Network (LAN)	78.1	96.3	91.9	83.7	71.8	55.8	69.4	57.8	**78.0**
Management Information System	65.9	85.2	75.8	65.9	40.4	34.6	58.3	33.3	**58.0**
Point of Sale System for Food and Beverage	90.2	96.3	88.9	80.1	57.7	46.2	72.2	47.8	**72.8**
Property Management System	95.1	83.3	68.7	59.1	25.0	28.9	44.4	27.8	**51.6**
Yield Management System	46.3	35.2	42.4	29.4	12.8	7.7	16.7	11.1	**25.3**
Other	17.1	18.5	11.1	9.5	5.8	3.9	5.6	3.3	**8.8**

2. Indian Hotel Industry – Inventory and Chain Affiliation

Introduction

In this section, we present key operating statistics and other data for the Survey participants according to the number of rooms. The participating hotels have been classified into three categories: 'Less than 50 rooms', '50 to 150 rooms', and 'More than 150 rooms'. We have also drawn a comparison between Chain-Affiliated and Independent hotels.

Trends

- **Occupancy Dynamics:** The All-India average occupancy as per this year's Survey has improved since last year. Chain-Affiliated hotels have seen a rise in both monthly occupancy and weekly occupancy while Independent hotels have reported a decline in both. However, the reverse has been observed for average rates. The average rate has improved for Independent hotels by a margin of ₹194 from 2013-14 while Chain-Affiliated hotels have reported a decline of ₹271 from 2013-14. In addition, the so-called lean months (specifically June, July, and August), especially for seasonal markets have witnessed improved occupancies.

- **Reservations:** Central Reservations Systems (CRS) have given rise to a higher percentage of reservations as per this year's Survey for both Chain-Affiliated and Independent hotels as compared to last year. Online Reservations Systems (ORS), on the other hand, have only experienced growth in the Independent hotel segment. Chain-Affiliated hotels have reported lower reservations from Hotel Websites, Travel Agents and ORS while capitalising on their Regional Sales Offices (RSO) for bookings with 14.7% of reservations from RSO as compared to 5.9% for Independent hotels. Independent hotels, however, have gained more bookings than Chain-Affiliated hotels from Travel Agents and their Hotel Websites.

- **Guest Analysis:** Domestic guests comprise the majority of the business in both Chain-Affiliated and Independent Hotels. However, higher year-on-year growth in business travel has been observed in Chain-Affiliated hotels (65.2% in 2014-15 as compared to 61.4% in 2013-14). In the Leisure segment, Independent hotels reported an improvement in guest visitation at 43.3% as compared to 42.0% in 2013-14. The percentage of repeat guests has dropped or remained at par with last year across all inventory-based segments. However, it is the Independent hotels that have witnessed more of a drop in their repeat guests from 46.6% in 2013-14 to 45.2% this year.

TABLE 2-1: Indian Hotel Industry – Inventory and Chain Affiliation: Facilities Analysis and Staffing

Typical Room Profile of an Average Hotel

COMPOSITION		Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses		*792*	*480*	*87*	*201*	*1,157*
Air-Conditioned	Rooms	22.7	69.0	212.6	106.3	41.6
	Suites	3.1	7.5	17.1	8.9	5.0
Non-Air-Conditioned	Rooms	4.5	5.1	0.2	0.5	5.1
	Suites	0.6	0.5	1.5	0.2	0.6
Total Average Rooms		**30.9**	**82.0**	**231.5**	**115.8**	**52.3**

Average Number of Food & Beverage Outlets Per Hotel

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*634*	*441*	*78*	*185*	*968*
Restaurant	1.4	1.9	2.9	2.3	1.5
Bars	0.6	0.9	1.3	1.0	0.8
Others	0.3	0.6	1.0	0.6	0.6
Total	**2.3**	**3.4**	**5.1**	**3.9**	**2.8**

Average Number of Employees Per Hotel (Permanent / Contract / Full Time / Part Time)

COMPOSITION		Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses		*670*	*416*	*76*	*168*	*994*
Managers	Male	3.4	12.2	44.5	23.7	6.8
	Female	0.6	1.6	10.9	4.7	1.1
Supervisors	Male	4.7	16.5	59.9	28.0	9.9
	Female	0.6	2.0	10.5	4.6	1.3
Staff	Male	31.4	85.6	218.0	121.6	53.1
	Female	3.4	9.7	29.8	15.3	6.1
Total		**44.2**	**127.6**	**373.6**	**197.9**	**78.3**
Average Number of Employees per Room		1.5	1.6	1.6	1.6	1.5

Average Percentage of Trained Employees Per Hotel

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*470*	*350*	*67*	*150*	*737*
Managers	87.9 %	93.2 %	95.2 %	94.1 %	92.2 %
Supervisors	83.1	90.0	95.2	94.1	88.5
Staff	65.8	73.6	77.6	76.2	71.0
Total Avg. Trained Employees*	78.9	85.6	89.3	88.1	83.9
Total Avg. Un-Trained Employees	21.1	14.4	10.7	11.9	16.1

* Trained Employees includes those with a minimum one-year certificate course from a hotel management or equivalent institution; however, some hotels may have included those with short term (in-house) training.

TABLE 2-2: Indian Hotel Industry – Chain Affiliated vs. Independent: Financial Report (2014-15)

	Chain Affiliated			Independent			2014-15 All-India Average		
Number of Responses		*136*			*426*			*562*	
Average Total Rooms Per Hotel:		**129**			**62**			**78**	
Average Occupied Rooms Per Hotel:		**30,447**			**13,266**			**17,424**	
Average Occupancy Per Hotel:		**64.8%**			**60.2%**			**61.3%**	
Average Rate Per Hotel (₹)		**5,917**			**3,962**			**4,789**	
COMPOSITION	**Percentage of Revenue**	**Amount per Available Room (₹)**	**Amount per Occupied Room (₹)**	**Percentage of Revenue**	**Amount per Available Room (₹)**	**Amount per Occupied Room (₹)**	**Percentage of Revenue**	**Amount per Available Room (₹)**	**Amount per Occupied Room (₹)**
REVENUE									
Rooms	50.0%	13,98,433	5,917	51.9%	8,54,139	3,962	**50.9%**	**10,72,198**	**4,789**
Food & Beverage	32.0	8,95,484	3,789	30.0	4,93,215	2,288	**31.0**	**6,54,374**	**2,923**
Banquets & Conferences	12.0	3,35,449	1,419	11.0	1,81,068	840	**11.5**	**2,42,917**	**1,085**
Telephone & Other	0.4	10,965	46	0.3	4,376	20	**0.3**	**7,016**	**31**
Minor Operated*	3.0	84,539	358	3.6	58,847	273	**3.3**	**69,140**	**309**
Rental & Other Income	2.6	72,640	307	3.4	55,353	257	**3.0**	**62,279**	**278**
Total	100.0	27,97,511	11,837	100.0	16,46,998	7,639	**100.0**	**21,07,924**	**9,414**
DEPARTMENTAL EXPENSES									
Rooms	22.7	3,17,697	1,344	21.0	1,79,593	833	**21.9**	**2,34,921**	**1,049**
Food & Beverage	47.5	5,85,029	2,475	59.7	4,02,727	1,868	**53.0**	**4,75,762**	**2,125**
Telephone & Other	60.3	6,610	28	134.6	5,892	27	**88.1**	**6,179**	**28**
Minor Operated*	63.7	53,880	228	78.4	46,129	214	**71.2**	**49,234**	**220**
Rental & Other Income	8.5	6,180	26	8.8	4,882	23	**8.7**	**5,402**	**24**
Total	34.7	9,69,396	4,102	38.8	6,39,223	2,965	**36.6**	**7,71,499**	**3,446**
DEPARTMENTAL INCOME	65.4	18,28,114	7,735	61.2	10,07,775	4,674	**63.4**	**13,36,425**	**5,969**
OPERATING EXPENSES									
Administrative & General	8.7	2,42,045	1,024	10.6	1,75,274	813	**9.6**	**2,02,024**	**902**
Management Fee	2.4	66,990	283	1.8	29,901	139	**2.1**	**44,760**	**200**
Marketing	3.6	1,01,644	430	2.9	48,203	224	**3.3**	**69,613**	**311**
Franchise Fees	0.2	6,184	26	0.2	2,808	13	**0.2**	**4,160**	**19**
Property Operations & Maintenance	4.4	1,22,343	518	6.2	1,01,236	470	**5.2**	**1,09,692**	**490**
Energy	9.1	2,53,496	1,073	11.4	1,86,934	867	**10.1**	**2,13,600**	**954**
Total	28.3	7,92,701	3,354	33.1	5,44,356	2,525	**30.5**	**6,43,850**	**2,876**
HOUSE PROFIT	37.0	10,35,414	4,381	28.1	4,63,419	2,149	**32.9**	**6,92,575**	**3,093**
FIXED EXPENSES									
Property Taxes	1.2	32,196	136	0.9	14,580	68	**1.0**	**21,638**	**97**
Insurance	0.2	6,841	29	0.3	5,254	24	**0.3**	**5,890**	**26**
Other Fixed Charges	2.4	65,835	279	0.9	15,207	71	**1.7**	**35,490**	**159**
Rent	1.2	32,327	137	0.7	11,861	55	**1.0**	**20,061**	**90**
Total	4.9	1,37,199	581	2.9	46,903	218	**3.9**	**83,078**	**371**
NET INCOME**	32.1%	8,98,215	3,801	25.3%	4,16,516	1,932	**28.9%**	**6,09,497**	**2,722**

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth

** Net Income is before depreciation, interest payments and taxes

TABLE 2-3: Indian Hotel Industry – Inventory: Financial Report (2014-15)

	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	2014-15 All-India Average
Number of Responses	*254*	*247*	*61*	*562*
Average Total Rooms Per Hotel:	**31**	**86**	**241**	**78**
Average Occupied Rooms Per Hotel:	**6,381**	**19,102**	**56,611**	**17,424**
Average Occupancy Per Hotel:	**59.2%**	**62.3%**	**66.2%**	**61.3%**
Average Rate Per Hotel (₹):	**2,671**	**4,182**	**6,612**	**4,789**

Percentage of Revenue

	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	2014-15 All-India Average
REVENUE				
Rooms	47.5%	54.1%	49.0%	**50.9%**
Food & Beverage	39.8	28.7	31.2	**31.0**
Banquets & Conferences	7.4	11.2	12.6	**11.5**
Telephone & Other	0.1	0.2	0.5	**0.3**
Minor Operated*	1.5	3.0	3.8	**3.3**
Rental & Other Income	3.6	2.8	2.9	**3.0**
Total	100.0	100.0	100.0	**100.0**
DEPARTMENTAL EXPENSES				
Rooms	24.8	20.3	22.8	**21.9**
Food & Beverage	60.7	59.2	47.0	**53.0**
Telephone & Other	204.7	116.9	72.4	**88.1**
Minor Operated*	102.1	57.8	77.1	**71.2**
Rental & Other Income	15.0	6.9	8.5	**8.7**
Total	42.8	36.8	35.3	**36.6**
DEPARTMENTAL INCOME	57.2	63.3	64.7	**63.4**
OPERATING EXPENSES				
Administrative & General	9.5	9.9	9.3	**9.6**
Management Fee	2.0	2.4	1.9	**2.1**
Marketing	1.9	3.1	3.8	**3.3**
Franchise Fees	0.2	0.3	0.1	**0.2**
Property Operations & Maintenance	5.0	6.0	4.6	**5.2**
Energy	10.8	11.3	9.1	**10.1**
Total	29.4	33.1	28.8	**30.5**
HOUSE PROFIT	27.8	30.2	36.0	**32.9**
FIXED EXPENSES				
Property Taxes	0.7	0.9	1.2	**1.0**
Insurance	0.3	0.3	0.3	**0.3**
Other Fixed Charges	1.1	0.7	2.6	**1.7**
Rent	1.2	1.0	0.9	**1.0**
Total	3.4	2.9	4.9	**3.9**
NET INCOME**	24.4%	27.3%	31.1%	**28.9%**

Amount per Available Room (₹)

	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	2014-15 All-India Average
REVENUE				
Rooms	5,49,267	9,32,570	15,53,686	**10,72,198**
Food & Beverage	4,60,159	4,94,310	9,88,995	**6,54,374**
Banquets & Conferences	85,622	1,93,682	3,98,165	**2,42,917**
Telephone & Other	1,567	3,371	15,186	**7,016**
Minor Operated*	17,514	52,030	1,21,461	**69,140**
Rental & Other Income	42,041	48,534	92,921	**62,279**
Total	11,56,171	17,24,498	31,70,414	**21,07,924**
DEPARTMENTAL EXPENSES				
Rooms	1,36,410	1,89,137	3,53,674	**2,34,921**
Food & Beverage	3,31,159	4,07,202	6,52,027	**4,75,762**
Telephone & Other	3,208	3,940	10,997	**6,179**
Minor Operated*	17,882	30,080	93,626	**49,234**
Rental & Other Income	6,290	3,358	7,868	**5,402**
Total	4,94,950	6,33,718	11,18,192	**7,71,499**
DEPARTMENTAL INCOME	6,61,221	10,90,780	20,52,222	**13,36,425**
OPERATING EXPENSES				
Administrative & General	1,10,034	1,70,888	2,96,189	**2,02,024**
Management Fee	23,541	42,162	59,880	**44,760**
Marketing	21,989	53,128	1,18,888	**69,613**
Franchise Fees	1,795	5,558	3,416	**4,160**
Property Operations & Maintenance	58,040	1,03,604	1,46,159	**1,09,692**
Energy	1,24,933	1,95,372	2,87,399	**2,13,600**
Total	3,40,332	5,70,713	9,11,931	**6,43,850**
HOUSE PROFIT	3,20,888	5,20,067	11,40,291	**6,92,575**
FIXED EXPENSES				
Property Taxes	8,613	15,647	37,248	**21,638**
Insurance	3,881	4,421	9,082	**5,890**
Other Fixed Charges	12,865	12,376	80,904	**35,490**
Rent	13,771	17,351	27,335	**20,061**
Total	39,131	49,794	1,54,570	**83,078**
NET INCOME**	2,81,758	4,70,273	9,85,722	**6,09,497**

Amount per Occupied Room (₹)

	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	2014-15 All-India Average
REVENUE				
Rooms	2,671	4,182	6,612	**4,789**
Food & Beverage	2,238	2,217	4,209	**2,923**
Banquets & Conferences	416	869	1,694	**1,085**
Telephone & Other	8	15	65	**31**
Minor Operated*	85	233	517	**309**
Rental & Other Income	204	218	395	**278**
Total	5,622	7,733	13,491	**9,414**
DEPARTMENTAL EXPENSES				
Rooms	663	848	1,505	**1,049**
Food & Beverage	1,610	1,826	2,775	**2,125**
Telephone & Other	16	18	47	**28**
Minor Operated*	87	135	398	**220**
Rental & Other Income	31	15	33	**24**
Total	2,407	2,842	4,758	**3,446**
DEPARTMENTAL INCOME	3,215	4,891	8,733	**5,969**
OPERATING EXPENSES				
Administrative & General	535	766	1,260	**902**
Management Fee	114	189	255	**200**
Marketing	107	238	506	**311**
Franchise Fees	9	25	15	**19**
Property Operations & Maintenance	282	465	622	**490**
Energy	608	876	1,223	**954**
Total	1,655	2,559	3,881	**2,876**
HOUSE PROFIT	1,560	2,332	4,852	**3,093**
FIXED EXPENSES				
Property Taxes	42	70	159	**97**
Insurance	19	20	39	**26**
Other Fixed Charges	63	56	344	**159**
Rent	67	78	116	**90**
Total	190	223	658	**371**
NET INCOME**	1,370	2,109	4,195	**2,722**

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth

** Net Income is before depreciation, interest payments and taxes

TABLE 2-4: Indian Hotel Industry – Inventory and Chain Affiliation: Market Data

Market Segmentation

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*526*	*368*	*70*	*151*	*813*
Airline Crew	0.6%	1.4%	3.6%	2.1%	0.9%
Business Traveller - Domestic	34.2	32.1	23.9	29.5	33.3
Business Traveller - Foreign	7.7	10.5	23.5	15.0	8.8
Complimentary Rooms	1.9	1.8	2.2	2.5	1.8
Tourists / Leisure FIT - Domestic	25.5	18.1	8.4	15.4	22.8
Tourists / Leisure FIT - Foreign	7.4	7.4	6.3	8.5	7.2
Meeting Participants (Less than 100 Attendees)	3.5	4.7	4.9	5.1	4.0
Meeting Participants (Over 100 Attendees)	5.2	8.2	10.9	8.8	6.4
Tour Groups - Domestic	8.0	6.6	4.6	4.7	7.6
Tour Groups - Foreign	3.1	5.2	5.1	5.5	3.7
Other	3.0	4.1	6.7	2.9	3.5
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Guest Analysis

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*543*	*383*	*71*	*157*	*840*
Domestic Guests	80.5%	73.8%	58.2%	66.9%	78.1%
Foreign Guests	19.5	26.2	41.8	33.1	21.9
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Total Business Guests	54.7%	60.1%	69.7%	65.2%	56.7%
Total Leisure Guests	45.3	39.9	30.3	34.8	43.3
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Avg. Stay of Foreign Guests (Days)	2.5	3.4	2.8	3.7	2.7
Avg. Stay of Domestic Guests (Days)	2.4	2.6	1.9	2.3	2.5
Avg. Stay of Business Guests (Days)	2.4	2.5	2.2	2.0	2.5
Avg. Stay of Leisure Guests (Days)	2.2	2.1	1.8	2.0	2.2
Percentage of Repeat Guests	45.5%	43.7%	35.2%	38.6%	45.2%

Country of Origin of Guests

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*300*	*290*	*64*	*131*	*523*
ASEAN*	5.7%	7.2%	5.8%	6.0%	6.5%
Australia	4.3	3.0	2.8	3.4	3.6
Canada	3.6	2.7	2.8	3.1	3.1
Caribbean	1.4	0.8	2.1	0.4	1.4
China	5.3	5.7	4.6	4.9	5.5
France	6.6	5.4	3.3	5.5	5.8
Germany	5.9	5.8	3.3	4.3	5.9
Japan	3.8	5.5	6.1	5.9	4.5
Middle East	6.1	5.8	4.4	4.2	6.2
Other European Nations	6.7	6.4	5.7	5.9	6.6
Russia	3.0	4.3	4.1	3.0	3.8
SAARC **	6.9	6.0	6.8	5.9	6.7
South Africa	2.2	3.5	1.6	3.1	2.7
UK	14.7	10.6	10.3	10.7	12.9
USA	11.5	9.8	14.0	13.2	10.4
Other	12.5	17.6	22.6	20.4	14.6
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

* ASEAN: Association of South East Asian Nations - Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam, Laos, Cambodia, Brunei Darussalam
** SAARC: South Asian Association for Regional Co-operation - India, Pakistan, Bangladesh, Sri Lanka, Nepal, Bhutan, Maldives

TABLE 2-5: Indian Hotel Industry – Inventory and Chain Affiliation: Monthly and Daily Occupancy

Average Monthly Occupancy

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*504*	*372*	*77*	*163*	*790*
January	59.7%	63.2%	67.1%	66.4%	60.7%
February	60.0	65.8	74.0	72.0	61.6
March	55.4	58.7	65.1	63.0	56.4
April	55.5	58.2	60.0	61.7	55.9
May	59.0	57.9	56.2	60.1	58.0
June	56.2	55.5	56.0	58.9	55.3
July	50.8	53.1	55.1	57.9	50.8
August	51.7	55.1	57.3	60.0	52.1
September	52.2	57.0	61.6	63.0	53.2
October	58.7	58.4	60.0	60.7	58.3
November	62.9	65.8	70.0	69.8	63.5
December	66.2	67.1	66.0	68.4	66.1

Average Daily Occupancy

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*456*	*346*	*69*	*146*	*725*
Monday	51.3%	53.7%	62.1%	60.6%	51.6%
Tuesday	53.6	56.1	64.1	63.2	53.9
Wednesday	55.6	58.9	65.4	64.8	56.2
Thursday	55.7	58.9	64.2	65.1	56.1
Friday	58.4	58.3	59.6	59.5	58.2
Saturday	56.0	54.3	55.6	55.4	55.2
Sunday	47.1	48.1	53.7	53.0	47.0

TABLE 2-6: Indian Hotel Industry – Inventory and Chain Affiliation: Sources of Reservation

Sources of Advance Reservations

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*501*	*353*	*71*	*153*	*772*
Chain CRS (Central Reservations System)	3.0%	5.0%	9.8%	9.3%	3.3%
Direct Enquiry / Hotel Representative	44.6	42.7	38.0	39.2	44.2
Global Distribution System (GDS)	1.2	2.2	8.3	5.3	1.5
Hotel / Chain Website	8.9	7.0	6.2	6.4	8.3
Travel Agent & Tour Operator	19.9	18.1	12.1	13.4	19.6
Online Reservations Systems	8.9	8.3	7.4	6.9	8.9
Regional Sales Office	4.9	9.7	13.1	14.7	5.9
Other	8.7	7.0	5.3	4.9	8.3
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

TABLE 2-7: Indian Hotel Industry – Inventory and Chain Affiliation: Marketing Media

Marketing Media – Percentage of Hotels Using Each Media

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*499*	*373*	*74*	*162*	*784*
Consumer Central Media	13.8%	27.9%	43.2%	34.6%	19.0%
Direct Mail	76.6	81.8	81.1	82.7	78.2
Hotel Website	82.2	92.2	96.0	95.7	85.5
Loyalty Card Programme	24.7	52.8	78.4	78.4	32.0
Merchandising	22.9	37.8	32.4	38.9	27.6
Other Internet Sites	51.7	70.2	87.8	78.4	58.4
Outdoor Advertising	52.3	67.6	58.1	68.5	56.8
Pay Per Click	12.2	20.6	36.5	27.2	15.4
Print Advertising	76.2	86.9	87.8	87.7	80.0
Promotions	59.7	78.8	87.8	87.0	65.8
Radio Advertising	14.4	28.2	50.0	38.9	19.3
Telemarketing	42.5	57.4	48.7	56.2	47.3
TV Advertising	16.0	25.5	28.4	29.0	19.0
Viral Marketing	10.2	21.2	21.6	22.2	14.0

TABLE 2-8: Indian Hotel Industry – Inventory and Chain Affiliation: Payment Methods

Payment Methods Used

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*451*	*332*	*59*	*133*	*709*
Cash Sales	41.6%	28.2%	19.6%	20.5%	37.5%
Credit Card Sales	31.4	36.7	44.8	40.8	33.2
Credit Sales (Other Than Cards)	14.8	23.7	26.4	28.0	17.5
Electronic Fund Transfer	12.2	11.4	9.2	10.7	11.8
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Credit Cards Used

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*390*	*318*	*59*	*132*	*635*
American Express	4.9%	12.1%	23.6%	19.3%	7.3%
Diners Club	1.9	1.7	1.3	1.3	1.8
Mastercard / Eurocard	39.7	39.3	36.7	33.9	40.4
Visa	48.0	42.8	34.1	41.7	45.4
Other	5.4	4.1	4.3	3.8	5.0
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Average Credit Card Commission

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*248*	*231*	*50*	*113*	*416*
American Express	2.1%	3.0%	3.2%	3.3%	2.4%
Diners Club	0.4	0.6	1.3	0.9	0.5
Mastercard / Eurocard	1.7	1.6	1.2	1.3	1.7
Visa	1.7	1.6	1.2	1.2	1.7
Other	0.2	0.2	0.2	0.1	0.2

TABLE 2-9: Indian Hotel Industry – Inventory and Chain Affiliation: Technology

Technology in Hotels – Percentage of Hotels Using Each Technology

COMPOSITION	Less Than 50 Rooms	50 to 150 Rooms	More Than 150 Rooms	Chain Affiliated	Independent
Number of Responses	*464*	*334*	*68*	*155*	*711*
Accounting System	88.4%	90.7%	94.1%	92.3%	89.2%
Call Accounting System	33.2	57.5	73.5	65.8	41.4
Central Reservations System (CRS)	28.9	51.5	61.8	65.8	34.6
Electronic Keycard	31.3	64.4	89.7	80.7	41.6
Energy Management System	18.3	39.5	58.8	46.5	26.0
Internet / E-Mail	93.1	93.7	97.1	91.0	94.2
Internet / Website	87.3	89.2	92.7	90.3	88.1
Intranet System	41.6	52.1	67.7	68.4	43.2
Local Area Network (LAN)	69.0	88.0	89.7	89.7	75.4
Management Information System	46.6	69.8	77.9	74.2	54.4
Point of Sale System for Food and Beverage	62.3	83.5	91.2	90.3	68.9
Property Management System	37.1	62.9	94.1	76.8	46.0
Yield Management System	15.3	33.8	51.5	43.2	21.4
Other	5.4	11.7	17.7	13.6	7.7

3. Indian Hotel Industry – Seven Major Cities

Introduction

In this section, we present the operating profiles and financial data for different categories of hotels in seven major cities: Bengaluru, Chennai, Delhi-NCR, Goa, Kolkata, Mumbai, and Pune. This section will provide the reader an understanding of key trends in hotel performance in these cities.

Trends

- **Sources of Advance Reservation:** The prime source of advance reservations is still through Direct Enquiry/ Hotel Representative interaction, though this source has decreased its contribution to the total advance reservations made as compared to 2013-14. This year's Survey also included Regional Sales Office bookings as a source of advance reservations. The results showed Regional Sales Offices as the second-highest contributors towards room reservations amongst most cities. Exceptions were noted in the Three-Star, Two-Star and One-Star hotels across the country, which are still dependent on sources like Travel Agents and Tour Operator driven bookings or Online Reservations Systems. Thus, this year's Survey showed that Regional Sales Offices and Hotel Representatives have surpassed Travel Agents and Tour Operators' share of reservations.

- **Mode of Payment:** This year's Survey indicates that Electronic Fund Transfer has gained slight momentum among the Four-Star, Three-Star, Two-Star and One-Star hotels across all the seven cities. However, the Five-Star Deluxe and Five-Star hotels in Bengaluru, Chennai, Goa, Mumbai and Pune reported decreased use of electronic fund transfer while Cash and Credit Card Sales increased. Credit Card Sales are observed to be the primary mode of transaction across all the major cities with Five-Star Deluxe and Five-Star hotels in Bengaluru reporting the highest share at 59.5% of their sales.

- **Country of Origin:** While there has been little difference in the overall composition of foreign visitors on an All-India basis, some cities have reported an increase in foreign guests. Bengaluru, Chennai, Delhi-NCR, Mumbai, and Pune have reported an increase in visitors from Japan and the Middle East while Goa and Kolkata have reported an increase in visitors from the Middle East, France and Other European countries. Visitation from China has diminished across the board while visitations from the Caribbean and UK have improved among most cities.

TABLE 3-1: Indian Hotel Industry – Seven Major Cities: Facilities and Guest Analysis

Typical Room Profile of an Average Hotel

		Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION		Five-Star Deluxe & Five-Star	Four-Star & Three-star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses		*16*	*26*	*16*	*16*	*14*	*28*	*8*	*25*	*16*	*46*	*38*	*13*	*24*	*8*	*29*
Air-Conditioned	Rooms	157.4	91.1	144.4	80.0	142.8	56.6	134.9	31.1	219.2	57.9	31.3	193.9	68.5	103.9	43.4
	Suites	20.3	8.5	13.4	3.2	11.4	9.1	13.9	2.7	15.7	5.3	3.0	18.0	10.9	6.4	3.6
Non-Air-Conditioned	Rooms	0.0	4.7	0.0	0.0	0.0	0.7	0.0	5.4	0.0	1.2	0.2	0.0	0.0	0.0	4.2
	Suites	0.0	0.9	0.0	0.0	0.0	0.7	0.0	0.1	0.0	0.2	0.1	0.0	0.0	0.0	0.6
Total Average Rooms		**177.7**	**105.2**	**157.9**	**83.2**	**154.1**	**67.1**	**148.8**	**39.3**	**234.9**	**64.5**	**34.6**	**211.9**	**79.4**	**110.3**	**51.8**

Average Number of Food & Beverage Outlets Per Hotel

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	Five-Star Deluxe & Five-Star	Four-Star & Three-star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses	*14*	*25*	*14*	*15*	*13*	*26*	*7*	*17*	*15*	*40*	*22*	*12*	*21*	*8*	*29*
Restaurant	3.1	1.7	2.3	1.5	3.2	1.8	2.4	1.4	3.3	1.4	1.1	3.4	1.4	2.5	1.3
Bars	1.2	0.8	1.2	0.9	1.9	1.4	1.7	0.8	1.3	0.9	0.7	1.3	0.8	1.1	0.7
Others	0.6	0.3	0.9	0.9	0.4	0.5	1.9	0.4	0.5	0.5	0.2	1.1	0.3	0.6	0.4
Total	**4.9**	**2.9**	**4.4**	**3.3**	**5.5**	**3.7**	**6.0**	**2.5**	**5.1**	**2.8**	**2.0**	**5.8**	**2.5**	**4.3**	**2.4**

Guest Analysis

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	Five-Star Deluxe & Five-Star	Four-Star & Three-star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses	*14*	*17*	*14*	*9*	*12*	*24*	*7*	*21*	*15*	*39*	*35*	*12*	*16*	*8*	*23*
Domestic Guests	50.3%	69.4%	61.3%	70.2%	69.7%	67.1%	75.2%	78.9%	57.3%	73.1%	69.5%	42.4%	67.0%	69.3%	84.0%
Foreign Guests	49.7	30.6	38.7	29.8	30.3	32.9	24.8	21.1	42.7	26.9	30.5	57.6	33.0	30.8	16.0
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Total Business	84.0%	78.3%	89.5%	61.0%	24.7%	29.4%	78.3%	61.1%	74.1%	74.4%	67.7%	65.3%	74.1%	86.5%	70.8%
Total Leisure	16.0	21.7	10.5	39.0	75.3	70.6	21.7	38.9	25.9	25.7	32.3	34.7	25.9	13.5	29.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Avg. Stay of Foreign Guests (Days)	3.1	3.6	2.6	4.2	6.9	6.6	1.8	2.9	2.0	3.5	2.1	2.4	1.9	4.8	3.2
Avg. Stay of Domestic Guests (Days)	2.7	2.9	2.1	3.8	3.1	2.7	1.0	3.1	1.7	2.8	2.3	1.5	2.0	4.7	3.4
Avg. Stay of Business Guests (Days)	3.0	3.5	2.5	3.8	2.1	2.3	1.0	3.3	1.8	3.0	2.9	1.9	2.6	4.3	2.4
Avg. Stay of Leisure Guests (Days)	2.0	1.7	1.4	2.3	3.3	3.1	1.8	3.0	1.8	2.5	1.7	1.5	1.3	1.8	2.3
Percentage of Repeat Guests	30.3%	57.7%	49.4%	60.8%	16.6%	40.4%	46.0%	47.2%	48.8%	52.7%	47.1%	49.3%	31.8%	43.8%	53.0%

TABLE 3-2: Indian Hotel Industry – Seven Major Cities: Staffing

Average Number of Employees Per Hotel (Permanent / Contract / Full Time / Part Time)

		Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION		Five-Star Deluxe & Five-Star	Four- Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses		*14*	*20*	*12*	*14*	*12*	*25*	*7*	*22*	*14*	*41*	*35*	*13*	*21*	*7*	*27*
Managers	Male	35.3	14.0	37.2	11.6	43.7	9.0	39.1	3.6	43.4	7.7	2.2	54.3	15.3	22.7	5.3
	Female	9.2	1.9	5.2	2.0	12.3	1.8	13.1	0.6	12.4	1.0	0.5	15.2	2.4	3.6	0.9
Supervisors	Male	45.7	15.7	41.4	15.3	42.5	14.8	46.7	6.8	93.4	10.2	2.6	87.8	15.6	28.4	7.8
	Female	9.1	2.3	4.2	1.7	9.0	2.5	9.4	0.9	12.0	2.0	0.5	20.0	1.9	2.6	1.4
Staff	Male	184.9	82.7	153.3	96.4	219.8	90.6	149.3	35.9	224.5	64.4	25.4	269.1	67.2	103.3	39.2
	Female	27.5	10.7	22.8	16.6	33.1	9.6	23.3	3.0	33.9	3.6	2.0	34.0	5.2	8.3	3.7
Total		**311.7**	**127.2**	**264.1**	**143.6**	**360.4**	**128.3**	**281.0**	**50.6**	**419.5**	**88.8**	**33.2**	**480.4**	**107.7**	**168.9**	**58.2**
Average Number of Employees per Room		1.7	1.7	1.8	1.9	2.1	2.6	1.9	1.2	2.0	1.7	1.0	2.6	1.5	1.5	1.2

Average Percentage of Trained Employees Per Hotel

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses	*10*	*18*	*9*	*13*	*11*	*20*	*7*	*16*	*9*	*30*	*13*	*12*	*17*	*7*	*19*
Managers	96.0%	87.9%	98.8%	94.8%	96.0%	83.4%	88.8%	77.0%	93.4%	85.7%	89.5%	98.9%	96.5%	95.1%	98.6%
Supervisors	98.6	87.2	94.8	92.3	93.0	80.4	80.5	88.0	94.6	75.2	65.2	97.1	93.4	93.3	88.7
Staff	86.2	79.6	73.0	53.8	95.7	77.5	77.0	53.8	70.1	59.8	53.1	81.4	87.5	77.0	71.7
Total Avg. Trained Employees*	89.7	84.9	80.9	80.3	95.4	80.4	82.1	72.9	79.3	64.8	57.1	92.5	92.5	88.4	77.3
Total Avg. Un-Trained Employees	10.3	15.1	19.1	19.7	4.6	19.6	17.9	27.1	20.7	35.2	42.9	7.5	7.5	11.6	22.7

* Trained Employees includes those with a minimum one-year certificate course from a hotel management or equivalent institution; however, some hotels may have included those with short term (in-house) training.

TABLE 3-3: Indian Hotel Industry – Seven Major Cities: Financial Report – Percentage of Revenue (2014-15)

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses	*12*	*14*	*8*	*6*	*9*	*20*	*4*	*8*	*12*	*24*	*15*	*12*	*10*	*4*	*15*
Average Total Rooms Per Hotel:	**173**	**114**	**167**	**90**	**151**	**67**	**171**	**43**	**249**	**68**	**34**	**222**	**94**	**127**	**53**
Average Occupied Rooms Per Hotel:	**42,611**	**23,806**	**36,748**	**23,810**	**40,817**	**15,720**	**45,927**	**10,017**	**65,762**	**18,166**	**8,075**	**48,994**	**19,943**	**27,652**	**11,012**
Average Occupancy Per Hotel:	**70.0%**	**58.9%**	**62.5%**	**71.6%**	**75.0%**	**66.0%**	**77.3%**	**64.2%**	**75.1%**	**76.8%**	**69.6%**	**65.3%**	**65.4%**	**59.8%**	**59.1%**
Average Rate Per Hotel (₹):	**6,950**	**3,200**	**4,506**	**3,203**	**8,775**	**4,690**	**5,621**	**2,636**	**6,716**	**4,241**	**2,609**	**8,943**	**3,938**	**3,741**	**2,431**
REVENUE															
Rooms	55.2%	59.4%	45.7%	46.4%	64.7%	66.6%	41.4%	52.4%	52.0%	66.4%	81.1%	47.7%	59.1%	50.8%	40.4%
Food & Beverage	26.9	31.7	27.1	37.1	26.5	24.6	32.1	24.6	25.9	20.4	13.9	26.2	23.4	35.3	26.4
Banquets & Conferences	11.3	3.4	21.9	12.4	2.7	3.6	19.9	17.2	14.6	9.2	0.3	15.2	7.7	9.4	21.5
Telephone & Other	0.5	0.1	0.4	0.1	0.6	0.2	0.2	0.3	0.5	0.3	0.4	0.4	0.4	0.1	0.0
Minor Operated*	4.4	1.1	4.1	1.1	3.5	1.9	3.2	2.7	3.5	0.7	0.2	6.8	2.6	3.9	0.5
Rental & Other Income	1.8	4.3	0.8	2.9	2.0	3.0	3.3	2.7	3.4	3.0	4.2	3.7	6.8	0.5	11.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
DEPARTMENTAL EXPENSES															
Rooms	17.6	21.0	23.9	30.3	19.7	20.6	26.9	11.7	25.4	15.8	27.1	24.6	20.2	18.2	27.9
Food & Beverage	49.9	65.3	52.7	56.7	52.1	69.7	53.9	58.3	56.2	63.4	95.2	59.9	68.6	55.1	51.1
Telephone & Other	82.2	61.4	90.0	43.3	22.7	83.6	149.3	401.0	105.4	127.7	255.2	73.4	105.1	375.3	545.5
Minor Operated*	54.5	81.3	51.3	138.3	71.6	82.0	60.7	94.8	55.9	240.4	347.4	79.8	59.2	33.5	515.9
Rental & Other Income	0.5	0.5	0.0	19.2	0.0	14.4	0.0	47.3	1.8	5.7	23.6	21.2	0.0	0.0	9.6
Total	31.5	36.3	39.2	44.2	30.6	35.6	41.4	35.8	38.6	31.4	38.2	43.0	35.3	35.7	39.4
DEPARTMENTAL INCOME	68.5	63.7	60.9	55.8	69.5	64.4	58.7	64.3	61.4	68.6	61.8	57.0	64.7	64.3	60.6
OPERATING EXPENSES															
Administrative & General	7.9	9.7	11.6	13.9	9.5	10.7	10.0	9.1	11.2	10.1	6.8	9.3	10.1	8.0	6.9
Management Fee	4.0	1.1	2.5	0.2	1.5	0.6	2.2	5.1	1.5	3.1	2.8	1.4	1.2	1.7	2.0
Marketing	5.3	1.9	2.4	1.0	5.1	2.2	3.1	3.4	4.3	3.0	4.0	3.4	3.2	3.7	1.4
Franchise Fees	0.0	0.2	0.0	0.5	0.3	0.3	0.0	0.7	0.2	0.6	0.0	0.0	0.2	0.4	0.0
Property Operations & Maintenance	6.4	2.8	4.1	3.4	7.9	6.2	4.7	8.8	5.2	5.3	5.0	5.0	7.3	12.3	2.3
Energy	7.3	10.6	12.6	11.1	6.8	6.3	10.9	14.6	10.0	11.6	15.1	9.9	13.2	17.1	9.8
Total	30.8	26.2	33.1	30.0	31.1	26.3	30.9	41.8	32.4	33.7	33.8	29.0	35.0	43.1	22.5
HOUSE PROFIT	37.7	37.4	27.8	25.8	38.4	38.1	27.7	22.4	29.0	34.9	28.0	28.0	29.7	21.3	38.1
FIXED EXPENSES															
Property Taxes	1.4	1.5	0.8	0.3	0.1	0.5	0.8	1.1	2.3	1.2	1.8	1.3	0.7	2.0	0.6
Insurance	0.3	0.2	0.9	0.2	0.2	0.2	0.3	0.2	0.3	0.2	0.5	0.3	0.2	0.3	0.6
Other Fixed Charges	3.4	0.3	1.3	0.8	2.1	0.4	0.8	1.1	3.1	2.6	1.5	2.6	0.4	0.1	0.5
Rent	2.0	0.7	0.7	0.0	0.2	0.3	0.8	0.7	1.6	0.3	0.7	0.5	1.9	0.0	0.8
Total	7.0	2.6	3.7	1.3	2.6	1.4	2.7	3.1	7.3	4.3	4.4	4.7	3.2	2.4	2.5
NET INCOME**	30.7%	34.8%	24.1%	24.5%	35.8%	36.7%	25.0%	19.3%	21.7%	30.6%	23.6%	23.3%	26.5%	18.9%	35.6%

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth

** Net Income is before depreciation, interest payments and taxes

TABLE 3-4: Indian Hotel Industry – Seven Major Cities: Financial Report – Amount Per Available Room (2014-15)

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star & Two-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Two-Star & One-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star & Two-Star**
Number of Responses	*12*	*14*	*8*	*6*	*9*	*20*	*4*	*8*	*12*	*24*	*15*	*12*	*10*	*4*	*15*
Average Total Rooms Per Hotel:	**173**	**114**	**167**	**90**	**151**	**67**	**171**	**43**	**249**	**68**	**34**	**222**	**94**	**127**	**53**
Average Occupied Rooms Per Hotel:	**42,611**	**23,806**	**36,748**	**23,810**	**40,817**	**15,720**	**45,927**	**10,017**	**65,762**	**18,166**	**8,075**	**48,994**	**19,943**	**27,652**	**11,012**
Average Occupancy Per Hotel:	**70.0%**	**58.9%**	**62.5%**	**71.6%**	**75.0%**	**66.0%**	**77.3%**	**64.2%**	**75.1%**	**76.8%**	**69.6%**	**65.3%**	**65.4%**	**59.8%**	**59.1%**
Average Rate Per Hotel (₹):	**6,950**	**3,200**	**4,506**	**3,203**	**8,775**	**4,690**	**5,621**	**2,636**	**6,716**	**4,241**	**2,609**	**8,943**	**3,938**	**3,741**	**2,431**
REVENUE (₹)															
Rooms	18,44,378	6,66,203	10,31,343	7,84,428	24,88,994	9,72,693	15,59,709	6,77,329	19,22,583	12,25,892	5,63,154	19,71,415	8,32,013	7,94,017	5,45,377
Food & Beverage	8,97,788	3,55,581	6,12,034	6,26,896	10,18,572	3,59,395	12,09,173	3,18,094	9,57,293	3,75,455	96,763	10,81,091	3,29,822	5,51,561	3,56,237
Banquets & Conferences	3,77,962	37,701	4,94,086	2,10,071	1,01,795	52,918	7,49,850	2,22,543	5,39,550	1,70,458	1,741	6,27,926	1,09,102	1,46,632	2,89,560
Telephone & Other	15,698	1,368	8,110	1,412	24,338	3,186	7,428	4,392	19,894	5,468	2,563	16,235	5,483	2,121	472
Minor Operated*	1,46,247	12,092	91,239	17,926	1,32,781	28,321	1,20,500	35,260	1,30,944	12,505	1,575	2,79,484	37,186	61,164	6,346
Rental & Other Income	60,018	48,698	17,895	49,221	78,537	44,451	1,25,423	34,272	1,24,889	55,556	28,966	1,54,342	95,072	7,502	1,50,826
Total	33,42,091	11,216,45	22,54,706	16,89,954	38,45,017	14,60,962	37,72,083	12,91,890	36,95,152	18,45,334	6,94,762	41,30,492	14,08,678	15,62,997	13,48,818
DEPARTMENTAL EXPENSES (₹)															
Rooms	3,24,849	1,39,809	2,46,055	2,37,357	4,90,357	2,00,258	4,18,969	79,248	4,89,191	1,93,329	1,52,692	4,84,545	1,67,823	1,44,095	1,52,096
Food & Beverage	6,36,300	2,56,659	5,82,458	4,74,839	5,83,854	2,87,445	10,56,588	3,15,346	8,41,378	3,45,878	93,798	10,23,284	3,01,236	3,84,996	3,30,095
Telephone & Other	12,902	840	7,300	611	5,518	2,662	11,088	17,611	20,974	6,983	6,539	11,923	5,765	7,959	2,575
Minor Operated*	79,644	9,824	46,801	24,799	95,064	23,225	73,195	33,422	73,199	30,062	5,470	2,22,909	22,017	20,484	32,737
Rental & Other Income	288	265	-	9,441	-	6,418	-	16,198	2,237	3,174	6,846	32,667	-	-	14,447
Total	10,53,983	4,07,398	8,82,614	7,47,046	11,74,793	5,20,008	15,59,840	4,61,825	14,26,979	5,79,426	2,65,345	17,75,328	4,96,840	5,57,534	5,31,949
DEPARTMENTAL INCOME (₹)	22,88,108	7,14,248	13,72,093	9,42,908	26,70,224	9,40,954	22,12,243	8,30,064	22,68,173	12,65,908	4,29,417	23,55,164	9,11,837	10,05,463	8,16,869
OPERATING EXPENSES (₹)															
Administrative & General	2,63,148	1,09,205	2,60,376	2,34,577	3,65,870	1,56,936	3,78,159	1,17,860	4,15,333	1,87,187	47,252	3,84,658	1,41,549	1,24,528	93,286
Management Fee	1,33,216	11,940	55,838	3,450	59,165	8,138	83,804	66,127	53,661	56,814	19,531	58,836	16,984	26,166	27,513
Marketing	1,77,001	21,010	53,803	16,029	1,96,557	32,046	1,15,786	44,500	1,60,343	54,612	27,802	1,38,434	44,654	57,554	19,320
Franchise Fees	-	1,843	-	7,779	10,258	4,126	-	9,547	6,352	11,489	216	894	2,574	6,138	-
Property Operations & Maintenance	2,12,574	31,511	91,471	57,415	3,02,739	90,232	1,75,566	1,13,505	1,92,327	96,952	34,865	2,04,617	1,02,345	1,91,448	31,022
Energy	2,42,235	1,18,739	2,84,664	1,87,095	2,60,243	92,357	4,12,736	1,88,631	3,69,391	2,14,613	1,05,189	4,10,757	1,85,280	2,66,966	1,31,727
Total	10,28,175	2,94,249	7,46,151	5,06,345	11,94,832	3,83,834	11,66,050	5,40,170	11,97,407	6,21,667	2,34,855	11,98,197	4,93,386	6,72,800	3,02,869
HOUSE PROFIT (₹)	12,59,933	4,20,000	6,25,941	4,36,563	14,75,392	5,57,120	10,46,192	2,89,895	10,70,766	6,44,241	1,94,562	11,56,967	4,18,451	3,32,663	5,14,000
FIXED EXPENSES (₹)															
Property Taxes	47,363	16,791	18,316	5,433	2,614	6,977	28,176	13,900	85,016	22,097	12,307	53,304	9,344	31,101	8,211
Insurance	8,548	2,691	19,315	2,740	8,378	2,959	12,690	2,972	10,725	4,022	3,523	12,140	3,103	4,696	7,570
Other Fixed Charges	1,12,175	2,898	29,746	13,838	81,786	6,279	31,301	14,586	1,15,391	48,084	10,084	1,05,924	5,823	1,186	6,313
Rent	65,004	7,282	15,969	24	6,943	4,779	29,405	9,114	58,021	5,956	4,865	22,223	27,310	-	11,335
Total	2,33,089	29,662	83,346	22,035	99,721	20,994	1,01,572	40,573	2,69,152	80,159	30,779	1,93,591	45,581	36,982	33,428
NET INCOME (₹)**	10,26,844	3,90,338	5,42,595	4,14,528	13,75,670	5,36,126	9,44,621	2,49,321	8,01,614	5,64,082	1,63,783	9,63,376	3,72,870	2,95,681	4,80,572

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth

** Net Income is before depreciation, interest payments and taxes

TABLE 3-5: Indian Hotel Industry – Seven Major Cities: Financial Report – Amount Per Occupied Room (2014-15)

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star & Two-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Two-Star & One-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five- Star & Four-Star**	**Three-Star & Two-Star**
Number of Responses	*12*	*14*	*8*	*6*	*9*	*20*	*4*	*8*	*12*	*24*	*15*	*12*	*10*	*4*	*15*
Average Total Rooms Per Hotel:	**173**	**114**	**167**	**90**	**151**	**67**	**171**	**43**	**249**	**68**	**34**	**222**	**94**	**127**	**53**
Average Occupied Rooms Per Hotel:	**42,611**	**23,806**	**36,748**	**23,810**	**40,817**	**15,720**	**45,927**	**10,017**	**65,762**	**18,166**	**8,075**	**48,994**	**19,943**	**27,652**	**11,012**
Average Occupancy Per Hotel:	**70.0%**	**58.9%**	**62.5%**	**71.6%**	**75.0%**	**66.0%**	**77.3%**	**64.2%**	**75.1%**	**76.8%**	**69.6%**	**65.3%**	**65.4%**	**59.8%**	**59.1%**
Average Rate Per Hotel (₹):	**6,950**	**3,200**	**4,506**	**3,203**	**8,775**	**4,690**	**5,621**	**2,636**	**6,716**	**4,241**	**2,609**	**8,943**	**3,938**	**3,741**	**2,431**
REVENUE (₹)															
Rooms	7,495	3,200	4,694	2,976	9,181	4,152	5,879	2,891	7,287	4,586	2,443	8,943	3,938	3,632	2,625
Food & Beverage	3,649	1,708	2,786	2,378	3,757	1,534	4,558	1,357	3,628	1,405	420	4,904	1,561	2,523	1,715
Banquets & Conferences	1,536	181	2,249	797	375	226	2,827	950	2,045	638	8	2,848	516	671	1,394
Telephone & Other	64	7	37	5	90	14	28	19	75	20	11	74	26	10	2
Minor Operated*	594	58	415	68	490	121	454	150	496	47	7	1,268	176	280	31
Rental & Other Income	244	234	81	187	290	190	473	146	473	208	126	700	450	34	726
Total	13,582	5,388	10,262	6,412	14,183	6,236	14,219	5,513	14,005	6,903	3,014	18,737	6,668	7,150	6,492
DEPARTMENTAL EXPENSES (₹)															
Rooms	1,320	671	1,120	901	1,809	855	1,579	338	1,854	723	662	2,198	794	659	732
Food & Beverage	2,586	1,233	2,651	1,802	2,154	1,227	3,983	1,346	3,189	1,294	407	4,642	1,426	1,761	1,589
Telephone & Other	52	4	33	2	20	11	42	75	79	26	28	54	27	36	12
Minor Operated*	324	47	213	94	351	99	276	143	277	112	24	1,011	104	94	158
Rental & Other Income	1	1	-	36	-	27	-	69	8	12	30	148	-	-	70
Total	4,283	1,956	4,017	2,834	4,333	2,220	5,880	1,971	5,408	2,168	1,151	8,053	2,352	2,551	2,560
DEPARTMENTAL INCOME (₹)	9,299	3,431	6,245	3,577	9,849	4,016	8,339	3,542	8,597	4,736	1,863	10,684	4,316	4,600	3,932
OPERATING EXPENSES (₹)															
Administrative & General	1,069	524	1,185	890	1,350	670	1,425	503	1,574	700	205	1,745	670	570	449
Management Fee	541	57	254	13	218	35	316	282	203	213	85	267	80	120	132
Marketing	719	101	245	61	725	137	436	190	608	204	121	628	211	263	93
Franchise Fees	-	9	-	30	38	18	-	41	24	43	1	4	12	28	-
Property Operations & Maintenance	864	151	416	218	1,117	385	662	484	729	363	151	928	484	876	149
Energy	984	570	1,296	710	960	394	1,556	805	1,400	803	456	1,863	877	1,221	634
Total	4,178	1,413	3,396	1,921	4,407	1,638	4,395	2,305	4,538	2,326	1,019	5,435	2,335	3,078	1,458
HOUSE PROFIT (₹)	5,120	2,018	2,849	1,656	5,442	2,378	3,944	1,237	4,058	2,410	844	5,248	1,981	1,522	2,474
FIXED EXPENSES (₹)															
Property Taxes	192	81	83	21	10	30	106	59	322	83	53	242	44	142	40
Insurance	35	13	88	10	31	13	48	13	41	15	15	55	15	21	36
Other Fixed Charges	456	14	135	53	302	27	118	62	437	180	44	481	28	5	30
Rent	264	35	73	0	26	20	111	39	220	22	21	101	129	-	55
Total	947	142	379	84	368	90	383	173	1,020	300	134	878	216	169	161
NET INCOME (₹)**	4,173	1,875	2,470	1,573	5,074	2,288	3,561	1,064	3,038	2,110	710	4,370	1,765	1,353	2,313

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth

** Net Income is before depreciation, interest payments and taxes

TABLE 3-6: Indian Hotel Industry – Seven Major Cities: Market Data (2014-15)

Market Segmentation

COMPOSITION	Bengaluru Five-Star Deluxe & Five-Star	Bengaluru Four-Star & Three-Star	Chennai Five-Star Deluxe, Five-Star & Four-Star	Chennai Three-Star	Goa Five-Star Deluxe & Five-Star	Goa Four-Star & Three-Star	Kolkata Five-Star Deluxe, Five Star & Four-Star	Kolkata Three-Star & Two-Star	Mumbai Five-Star Deluxe & Five-Star	Mumbai Four-Star & Three-Star	Mumbai Two-Star & One-Star	Delhi-NCR Five-Star Deluxe & Five-Star	Delhi-NCR Four Star & Three-Star	Pune Five-Star Deluxe, Five-Star & Four-Star	Pune Three-Star & Two-Star
Number of Responses	15	15	12	10	11	23	5	19	15	38	28	12	16	7	21
Airline Crew	2.7%	2.5%	3.6%	0.0%	0.5%	2.2%	6.0%	0.2%	6.1%	0.8%	2.6%	3.0%	0.6%	2.3%	0.7%
Business Traveller - Domestic	30.8	43.4	43.7	34.1	3.4	19.7	38.2	50.3	25.3	41.8	42.7	18.0	32.6	58.3	54.2
Business Traveller - Foreign	34.8	20.3	25.3	16.4	2.3	4.9	17.4	7.4	16.7	14.7	14.6	26.4	12.7	23.1	7.5
Complimentary Rooms	0.7	1.4	1.2	1.8	3.5	0.9	1.4	1.2	1.6	1.2	3.0	2.1	1.1	1.1	0.9
Tourists / Leisure FIT - Domestic	3.9	6.9	4.6	5.2	34.6	29.7	8.0	15.2	14.2	8.8	11.5	13.9	11.1	5.7	17.2
Tourists / Leisure FIT - Foreign	2.3	2.7	3.7	8.2	12.4	24.4	5.2	8.0	8.1	6.2	9.5	20.5	10.4	2.8	2.7
Meeting Participants (Less than 100 Attendees)	8.6	5.7	2.8	3.9	10.4	3.6	5.8	2.9	2.6	4.0	3.0	1.9	3.8	0.3	4.9
Meeting Participants (Over 100 Attendees)	8.1	7.8	9.8	11.5	8.0	2.7	10.4	7.2	16.2	10.4	3.9	8.1	13.5	2.9	5.4
Tour Groups - Domestic	1.9	5.1	2.6	8.9	8.2	9.0	1.6	4.5	3.9	3.2	5.4	1.2	6.6	0.8	5.7
Tour Groups - Foreign	0.8	2.7	1.9	7.0	8.8	0.9	3.4	2.5	2.9	3.6	1.4	4.8	4.7	0.5	0.8
Other	5.5	1.5	0.7	3.1	8.0	2.0	2.6	0.7	2.4	5.3	2.6	0.2	3.0	2.2	0.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Country of Origin of Guests

COMPOSITION	Bengaluru Five-Star Deluxe & Five-Star	Bengaluru Four- Star & Three-Star	Chennai Five-Star Deluxe, Five-Star & Four-Star	Chennai Three-Star	Goa Five-Star Deluxe & Five-Star	Goa Four-Star & Three-Star	Kolkata Five-Star Deluxe, Five Star & Four-Star	Kolkata Three-Star & Two-Star	Mumbai Five-Star Deluxe & Five-Star	Mumbai Four-Star & Three-Star	Mumbai Two-Star & One-Star	Delhi-NCR Five-Star Deluxe & Five-Star	Delhi-NCR Four Star & Three-Star	Pune Five-Star Deluxe, Five-Star & Four-Star	Pune Three-Star & Two-Star
Number of Responses	*14*	*13*	*12*	*9*	*11*	*20*	*6*	*12*	*11*	*27*	*26*	*12*	*16*	*7*	*13*
ASEAN*	3.8%	3.5%	9.0%	22.1%	0.7%	0.6%	4.5%	3.8%	6.9%	4.7%	9.1%	5.5%	4.5%	7.1%	2.9%
Australia	5.1	4.6	2.4	3.2	0.6	1.9	2.7	3.4	2.0	2.8	2.9	2.9	6.5	2.6	4.7
Canada	2.0	2.5	2.3	2.5	0.7	2.1	2.8	3.5	2.5	3.2	2.5	3.1	4.0	2.5	4.3
Caribbean	0.4	0.9	0.1	1.3	7.4	0.3	0.1	0.2	0.6	0.7	5.6	1.3	1.4	0.0	0.6
China	2.9	7.1	2.8	3.9	0.5	0.9	1.9	3.9	2.2	5.5	2.6	5.2	6.8	4.6	6.8
France	5.7	5.5	6.5	6.2	1.9	2.1	1.3	4.8	2.5	4.0	2.8	3.2	8.1	1.4	2.9
Germany	6.3	6.3	6.7	7.9	2.3	2.4	3.4	3.4	3.2	3.3	5.2	3.0	2.5	6.3	6.6
Japan	3.7	12.4	15.2	5.6	0.5	0.5	4.0	6.2	8.8	4.8	3.1	8.4	7.1	4.4	7.1
Middle East	4.4	8.9	2.0	1.4	5.2	4.2	1.4	2.3	4.7	10.7	17.2	3.2	4.5	13.4	6.3
Other European	7.8	6.8	3.6	4.9	6.9	7.2	6.0	3.9	5.8	8.4	3.9	5.7	7.5	11.2	2.3
Russia	1.5	1.7	1.9	0.8	21.7	20.7	0.9	1.3	1.5	2.7	2.6	2.6	5.6	2.7	1.5
SAARC **	3.2	3.2	7.0	5.0	2.3	3.0	9.1	33.5	2.0	6.6	10.5	5.5	7.2	1.5	6.6
South Africa	0.7	3.5	1.1	5.5	0.8	1.5	1.0	0.6	2.5	9.6	4.2	1.9	2.6	0.4	2.5
UK	8.1	10.9	8.1	7.6	13.5	32.6	7.2	14.3	14.2	10.3	9.5	9.3	7.9	7.5	8.2
USA	18.3	18.7	12.5	10.4	3.3	4.9	13.3	7.9	14.3	10.5	8.0	13.1	11.2	8.5	18.9
Other	26.2	3.7	18.9	11.7	31.8	15.1	40.7	7.1	26.4	12.4	10.4	26.1	12.7	26.0	17.7
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

* ASEAN: Association of South East Asian Nations - Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam, Laos, Cambodia, Brunei Darussalam

** SAARC: South Asian Association for Regional Co-operation - India, Pakistan, Bangladesh, Sri Lanka, Nepal, Bhutan, Maldives

TABLE 3-7: Indian Hotel Industry – Seven Major Cities: Monthly and Daily Occupancy

Average Monthly Occupancy

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses	*15*	*20*	*12*	*11*	*12*	*23*	*7*	*20*	*14*	*36*	*31*	*13*	*16*	*8*	*21*
January	66.7%	60.8%	56.8%	72.5%	77.7%	74.9%	79.3%	70.2%	77.2%	79.6%	73.6%	67.6%	72.1%	64.0%	60.4%
February	76.1	58.2	63.6	72.5	84.8	74.6	84.1	70.8	83.4	79.6	71.7	82.5	81.2	64.6	61.1
March	68.6	52.0	56.2	64.0	81.9	65.7	65.3	58.7	71.9	70.1	64.7	71.5	68.8	58.5	57.1
April	66.9	53.3	52.2	62.9	77.3	64.6	67.1	57.4	72.7	69.9	64.1	62.3	58.8	54.4	55.8
May	65.8	56.7	52.6	68.4	70.2	55.5	68.1	57.3	68.1	70.3	65.3	55.0	52.5	57.4	60.9
June	63.3	53.3	60.3	70.6	70.3	51.7	66.4	59.7	66.2	67.4	62.8	52.2	51.9	58.1	61.0
July	60.7	56.1	56.7	72.8	59.1	43.9	70.7	57.9	69.0	65.4	61.4	57.1	59.3	57.8	59.8
August	61.7	55.9	54.4	70.7	64.3	49.6	68.1	56.8	70.9	66.2	66.6	58.0	60.1	58.1	58.7
September	66.7	58.0	57.8	75.9	67.4	53.7	71.6	58.6	72.3	69.5	64.6	63.3	69.3	59.9	57.6
October	59.9	50.4	54.9	70.8	71.8	64.4	58.1	51.4	66.5	68.2	66.2	62.0	64.2	55.3	59.8
November	73.9	59.3	60.2	74.6	75.3	72.0	79.7	68.1	78.0	76.6	72.9	74.6	76.1	71.0	65.2
December	57.5	55.0	56.0	80.6	76.3	75.5	79.3	72.3	79.4	80.4	74.8	67.2	72.1	73.0	69.5

Average Daily Occupancy

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	Five-Star Deluxe & Five-Star	Four- Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses	*15*	*17*	*13*	*9*	*10*	*18*	*6*	*20*	*12*	*36*	*31*	*12*	*14*	*7*	*20*
Monday	67.5%	50.0%	59.5%	63.8%	67.7%	58.5%	73.7%	55.1%	74.4%	72.6%	61.0%	61.0%	62.7%	57.7%	56.2%
Tuesday	73.1	54.1	64.5	74.1	66.7	57.6	74.2	57.6	78.5	75.2	69.0	61.8	65.4	61.6	60.9
Wednesday	75.8	58.4	67.3	75.1	68.3	57.1	75.7	61.3	78.2	76.9	70.5	63.3	68.1	68.1	63.1
Thursday	73.0	57.4	66.2	71.0	75.3	61.3	75.8	60.1	76.3	74.4	70.1	60.1	65.6	60.4	64.6
Friday	61.2	47.5	52.4	73.7	86.4	69.4	72.7	58.5	68.3	67.1	66.7	56.1	58.7	50.7	62.4
Saturday	55.0	42.3	43.3	65.0	83.9	71.8	64.7	52.7	63.7	57.9	59.4	51.9	50.6	39.9	58.4
Sunday	56.9	40.5	47.2	53.9	70.3	62.7	63.0	44.6	57.9	53.3	53.3	53.8	50.1	40.9	45.6

TABLE 3-8: Indian Hotel Industry – Seven Major Cities: Sources of Reservation

Source of Advance Reservations

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses	*16*	*18*	*11*	*9*	*12*	*23*	*6*	*18*	*14*	*34*	*34*	*12*	*16*	*8*	*21*
Chain CRS (Central Reservations System)	7.3%	3.2%	8.7%	2.4%	6.0%	2.6%	18.6%	1.7%	11.9%	4.0%	1.0%	4.6%	1.9%	6.0%	1.7%
Direct Enquiry / Hotel Representative	41.9	35.2	42.3	36.9	33.0	27.9	31.0	43.0	38.0	46.5	46.6	42.1	38.7	59.5	42.4
Global Distribution System (GDS)	17.2	5.1	6.1	1.9	2.6	2.4	5.0	1.6	6.6	2.3	1.3	6.9	6.4	4.4	1.8
Hotel / Chain Website	5.7	8.3	3.7	17.3	5.4	5.7	3.7	6.8	6.9	10.4	7.2	5.6	8.1	2.9	7.1
Travel Agent & Tour Operator	5.1	9.6	4.5	20.4	19.0	32.9	19.2	14.2	6.6	10.3	24.0	14.8	16.3	3.8	11.0
Online Reservations Systems	5.5	11.3	8.8	10.6	7.9	12.6	6.0	13.5	11.2	11.1	10.2	10.3	11.9	10.4	9.3
Regional Sales Office	11.9	18.7	21.5	7.8	20.5	10.8	14.9	10.6	13.6	7.5	1.2	10.3	6.3	4.2	14.9
Other	5.5	8.6	4.6	2.7	5.7	5.2	1.6	8.7	5.3	7.9	8.5	5.4	10.4	8.6	11.9
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

TABLE 3-9: Indian Hotel Industry – Seven Major Cities: Marketing Media

Marketing Media – Percentage of Hotels Using Each Media

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses	*16*	*17*	*12*	*11*	*12*	*24*	*7*	*21*	*15*	*36*	*31*	*11*	*15*	*8*	*20*
Consumer Central Media	50.0%	29.4%	25.0%	9.1%	8.3%	20.8%	42.9%	19.1%	60.0%	22.2%	9.7%	45.5%	20.0%	62.5%	26.3%
Direct Mail	93.8	58.8	66.7	100.0	50.0	87.5	100.0	71.4	80.0	77.8	74.2	90.9	86.7	100.0	73.7
Hotel Website	100.0	88.2	91.7	100.0	91.7	87.5	100.0	81.0	100.0	88.9	64.5	100.0	93.3	100.0	89.5
Loyalty Card Programme	81.3	58.8	75.0	54.6	75.0	29.2	100.0	23.8	93.3	44.4	9.7	81.8	60.0	62.5	47.4
Merchandising	56.3	29.4	25.0	18.2	25.0	29.2	57.1	19.1	46.7	19.4	12.9	18.2	20.0	37.5	10.5
Other Internet sites	87.5	58.8	91.7	81.8	83.3	58.3	100.0	57.1	86.7	55.6	32.3	100.0	73.3	87.5	73.7
Outdoor Advertising	87.5	52.9	25.0	45.5	83.3	54.2	57.1	47.6	66.7	52.8	19.4	26.3	60.0	75.0	73.7
Pay Per Click	37.5	0.0	16.7	18.2	33.3	16.7	14.3	14.3	46.7	16.7	6.5	36.4	13.3	25.0	15.8
Print Advertising	93.8	70.6	75.0	63.6	100.0	83.3	85.7	66.7	93.3	75.0	58.1	100.0	80.0	100.0	89.5
Promotions	87.5	76.5	91.7	72.7	66.7	83.3	100.0	76.2	100.0	58.3	58.1	81.8	73.3	100.0	63.2
Radio Advertising	62.5	23.5	16.7	9.1	50.0	20.8	71.4	19.1	53.3	8.3	12.9	27.3	6.7	37.5	15.8
Telemarketing	81.3	47.1	8.3	54.6	25.0	29.2	42.9	57.1	73.3	63.9	45.2	36.4	46.7	37.5	52.6
TV Advertising	37.5	5.9	8.3	18.2	16.7	25.0	14.3	14.3	33.3	13.9	12.9	9.1	6.7	25.0	21.1
Viral Marketing	18.8	5.9	0.0	9.1	16.7	20.8	14.3	14.3	53.3	8.3	6.5	18.2	13.3	0.0	21.1

TABLE 3-10: Indian Hotel Industry – Seven Major Cities: Payment Methods

Payment Methods Used

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star & Two-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Two-Star & One-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star & Two-Star**
Number of Responses	*12*	*16*	*9*	*7*	*7*	*21*	*7*	*18*	*13*	*32*	*27*	*11*	*11*	*7*	*19*
Cash Sales	12.6%	18.4%	12.3%	32.2%	18.1%	27.2%	10.3%	41.0%	19.1%	22.6%	43.0%	20.0%	19.2%	18.4%	30.6%
Credit Card Sales	59.5	49.7	50.9	41.2	31.9	29.6	44.1	32.1	42.0	34.4	36.2	45.4	48.1	54.0	36.0
Credit Sales (Other Than Cards)	22.0	23.8	30.1	19.4	37.9	25.4	34.6	18.2	32.5	27.3	13.4	26.2	19.9	24.1	22.5
Electronic Fund Transfer	5.9	8.1	6.8	7.2	12.1	17.8	11.0	8.7	6.5	15.6	7.3	8.4	12.8	3.4	11.0
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Credit Cards Used

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	**Five-Star Deluxe & Five-Star**	**Four- Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star & Two-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Two-Star & One-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star &Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star &Two-Star**
Number of Responses	*14*	*15*	*9*	*8*	*8*	*21*	*7*	*15*	*14*	*28*	*21*	*11*	*12*	*7*	*18*
American Express	36.7%	18.6%	16.9%	10.0%	19.4%	7.2%	27.7%	9.5%	21.5%	11.6%	5.9%	25.1%	11.8%	14.5%	10.5%
Diners Club	3.3	2.7	3.6	0.9	0.6	0.6	1.9	1.9	1.4	0.2	4.0	0.6	3.5	6.7	2.7
Mastercard / Eurocard	31.6	37.3	40.1	44.1	34.4	41.7	30.1	35.2	38.4	43.5	32.6	41.8	38.8	41.5	38.7
Visa	27.1	38.7	31.6	42.5	43.4	43.8	39.0	48.2	36.9	40.9	49.8	30.7	38.8	35.4	45.9
Other	1.4	2.7	7.9	2.5	2.2	6.7	1.2	5.2	1.8	3.9	7.8	1.8	7.3	1.8	2.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Average Credit Card Commission

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star & Two-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Two-Star & One-Star**	**Five-Star Deluxe & Five-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star & Two-Star**
Number of Responses	*15*	*14*	*6*	*8*	*8*	*13*	*7*	*14*	*11*	*26*	*24*	*9*	*9*	*8*	*13*
American Express	3.2	2.9	3.6	2.6	3.3	2.3	3.4	2.3	3.3	3.4	2.9	3.3	3.5	3.6	2.8
Diners Club	1.0	0.7	1.8	0.6	0.6	0.3	2.2	0.5	1.4	0.3	0.8	1.3	0.6	0.9	0.7
Mastercard / Eurocard	1.0	1.3	1.1	1.5	1.2	1.4	1.0	1.5	1.2	1.2	1.7	1.2	1.4	1.2	1.4
Visa	1.2	1.4	1.1	1.6	1.0	1.5	1.0	1.5	1.0	1.3	1.7	1.1	1.4	1.2	1.6
Other	0.0	0.1	0.0	0.3	0.4	0.5	0.0	0.1	0.3	0.1	0.3	0.3	0.0	0.2	0.0

TABLE 3-11: Indian Hotel Industry – Seven Major Cities: Technology

Technology in Hotels – Percentage of Hotels Using Each Technology

	Bengaluru		Chennai		Goa		Kolkata		Mumbai			Delhi-NCR		Pune	
COMPOSITION	Five-Star Deluxe & Five-Star	Four- Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Two-Star & One-Star	Five-Star Deluxe & Five-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star & Two-Star
Number of Responses	*13*	*14*	*11*	*11*	*11*	*21*	*6*	*18*	*9*	*31*	*30*	*9*	*16*	*7*	*18*
Accounting System	92.3%	100.0%	90.9%	90.9%	100.0%	95.2%	100.0%	83.3%	100.0%	87.1%	96.7%	100.0%	100.0%	100.0%	94.4%
Call Accounting System	53.9	57.1	90.9	54.6	100.0	66.7	66.7	50.0	77.8	54.8	36.7	66.7	43.8	71.4	61.1
Central Reservations System (CRS)	76.9	71.4	72.7	54.6	54.6	33.3	33.3	38.9	66.7	48.4	16.7	77.8	43.8	85.7	27.8
Electronic Keycard	92.3	92.9	81.8	72.7	90.9	61.9	83.3	61.1	100.0	67.7	30.0	100.0	81.3	100.0	55.6
Energy Management System	69.2	35.7	81.8	9.1	45.5	38.1	33.3	44.4	44.4	29.0	10.0	55.6	68.8	71.4	33.3
Internet / E-Mail	100.0	100.0	100.0	90.9	100.0	100.0	83.3	88.9	88.9	96.8	90.0	100.0	93.8	100.0	100.0
Internet / Website	92.3	100.0	100.0	100.0	100.0	90.5	83.3	77.8	100.0	93.6	86.7	100.0	81.3	100.0	83.3
Intranet System	69.2	42.9	72.7	45.5	90.9	47.6	66.7	33.3	66.7	38.7	40.0	88.9	68.8	42.9	44.4
Local Area Network (LAN)	92.3	85.7	100.0	81.8	100.0	90.5	83.3	83.3	100.0	90.3	66.7	100.0	87.5	100.0	88.9
Management Information System	76.9	71.4	100.0	63.6	90.9	57.1	66.7	55.6	88.9	61.3	10.0	66.7	87.5	100.0	50.0
Point of Sale System for Food and Beverage	84.6	100.0	100.0	81.8	100.0	81.0	83.3	61.1	100.0	96.8	43.3	100.0	87.5	100.0	83.3
Property Management System	92.3	92.9	81.8	90.9	81.8	52.4	100.0	44.4	88.9	58.1	20.0	100.0	62.5	71.4	66.7
Yield Management System	46.2	35.7	36.4	36.4	54.6	19.1	50.0	22.2	55.6	35.5	16.7	22.2	50.0	42.9	11.1
Other	15.4	7.1	9.1	18.2	9.1	4.8	0.0	11.1	44.4	25.8	3.3	11.1	0.0	14.3	5.6

4. Indian Hotel Industry – Twelve Other Cities

Introduction

This section presents the operating profiles and financial data for different categories of hotels in 12 other cities. These cities are Agra, Ahmedabad, Gurgaon, Hyderabad, Indore, Jaipur, Kochi, Madurai, Mysore, Nashik, Thiruvananthapuram, and Udaipur. This section will provide the reader an understanding of the trends related to customer segmentation, use of technology, and operating performance amongst other key parameters. In certain cities, we were unable to fulfill the data requirement of a minimum of four hotels in each representation and have reflected this as 'ID' (insufficient data).

Trends

- **Financial Dynamics:** Contrary to the All-India trend of increasing Rooms expenses and decreasing F&B expenses, some of the cities specifically Indore, Jaipur, Thiruvananthapuram, and Udaipur reported a decrease in Rooms expenses and increase in F&B expense. Cities such as Ahmedabad, Indore, Kochi, Thiruvananthapuram and Udaipur have even improved their net income as compared to 2013-14, some of them exceeding 32.0% net income.

- **Average Rate:** This year's Survey witnessed an overall increase in the average rate across the 12 cities with the exception of Udaipur. The difference in increase ranges from a minimum of ₹100 in Gurgaon to a maximum of ₹721 in Indore. Mysore, as per this year's data, has achieved a noteworthy average rate for the market at ₹4,230 and, subsequently, a net income of 35.1%.

- **Occupancies:** Occupancies across these 12 cities have shown improvements, if not consistency, as compared to 2013-14 with the exception of Gurgaon (exhibiting occupancy of 58.5% as compared to 61.2% of 2013-14). Thiruvananthapuram reported the highest increase in occupancy from 50.7% in 2013-14 to 56.5% in 2014-15. With the average number of rooms increasing per hotel across most cities, the trend of improved occupancies is definitely a welcome positive change.

TABLE 4-1: Indian Hotel Industry – Twelve Other Cities: Facilities and Guest Analysis

Typical Room Profile of an Average Hotel

		Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION		Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses		*4*	*12*	*6*	*14*	*13*	*7*	*7*	*15*	*5*	*9*	*7*	*12*	*7*
Air-Conditioned	Rooms	219.3	70.1	155.3	95.6	44.4	122.7	61.4	44.5	57.2	49.8	44.9	53.9	37.9
	Suites	19.0	6.3	16.1	8.3	2.7	11.4	5.4	6.4	9.6	9.2	4.7	4.3	6.5
Non-Air-Conditioned	Rooms	0.0	0.0	0.0	4.4	0.0	0.0	0.0	1.7	0.0	13.6	1.7	3.9	5.4
	Suites	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.1	2.1	0.0	0.0	0.5
Total Average Rooms		**238.3**	**76.3**	**171.4**	**108.2**	**47.1**	**134.2**	**66.9**	**52.5**	**66.9**	**74.6**	**51.3**	**62.1**	**50.3**

Average Number of Food & Beverage Outlets Per Hotel

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*11*	*6*	*14*	*13*	*7*	*6*	*15*	*5*	*9*	*7*	*11*	*7*
Restaurant	2.5	1.6	3.0	1.5	1.8	2.3	1.5	1.8	1.4	1.3	1.4	2.0	2.0
Bars	1.3	0.0	1.3	0.9	0.5	1.1	0.7	1.0	1.0	0.8	0.6	1.0	1.1
Others	0.5	1.2	1.7	0.3	0.9	0.9	1.0	0.7	0.4	0.9	0.9	0.1	0.3
Total	**4.3**	**2.7**	**6.0**	**2.6**	**3.2**	**4.3**	**3.2**	**3.5**	**2.8**	**3.0**	**2.9**	**3.1**	**3.4**

Guest Analysis

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*9*	*7*	*10*	*10*	*7*	*6*	*14*	*5*	*6*	*9*	*11*	*7*
Domestic Guests	45.4%	80.3%	52.5%	85.5%	95.0%	57.1%	57.2%	77.1%	55.8%	76.5%	73.0%	66.7%	58.1%
Foreign Guests	54.6	19.7	47.5	14.5	5.0	42.9	42.9	22.9	44.2	23.5	27.0	33.3	41.9
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Total Business Guests	25.0	93.3	85.9	73.8	68.1	30.2	51.4	45.8	43.8	45.1	74.9	49.9	34.2
Total Leisure Guests	75.0	6.7	14.1	26.2	31.9	69.9	48.6	54.2	56.2	54.9	25.1	50.1	65.8
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**
Avg. Stay of Foreign Guests (Days)	1.2	2.3	2.1	1.7	1.0	1.9	2.0	2.0	3.6	1.8	3.0	5.4	2.1
Avg. Stay of Domestic Guests (Days)	1.5	1.4	1.7	3.3	2.2	2.0	2.0	2.1	2.4	2.3	2.3	2.9	2.0
Avg. Stay of Business Guests (Days)	1.5	1.9	2.2	3.3	1.3	1.5	2.0	2.5	2.2	5.0	4.0	2.4	1.2
Avg. Stay of Leisure Guests (Days)	1.5	2.0	1.4	1.3	2.3	2.0	1.5	2.2	2.8	1.7	2.7	2.3	2.3
Percentage of Repeat Guests	25.0%	40.0%	32.8%	26.6%	59.6%	22.3%	40.5%	27.5%	18.5%	55.8%	43.2%	37.3%	18.7%

TABLE 4-2: Indian Hotel Industry – Twelve Other Cities: Staffing

Average Number of Employees Per Hotel (Permanent / Contract / Full Time / Part Time)

		Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur	Jaipur	Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION		Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses		*4*	*10*	*5*	*13*	*12*	*7*	*6*	*15*	*5*	*8*	*7*	*11*	*7*
Managers	Male	40.8	10.2	48.4	15.1	7.0	29.3	10.8	8.5	8.2	9.4	11.6	11.7	18.3
	Female	5.0	1.6	8.6	1.2	1.4	4.0	1.0	1.0	0.8	2.3	1.6	1.1	2.1
Supervisors	Male	37.0	19.8	41.4	23.0	10.3	27.7	12.0	11.6	11.4	14.0	7.0	10.9	18.9
	Female	2.0	2.0	5.4	3.9	1.1	3.6	1.3	2.2	0.6	1.0	0.9	2.4	1.1
Staff	Male	224.3	61.8	194.0	89.7	98.2	141.7	62.8	47.0	53.8	83.9	61.7	50.3	89.6
	Female	19.0	3.2	19.2	13.4	2.9	8.4	3.5	10.9	10.2	10.4	5.4	20.9	7.1
Total		**328.0**	**98.6**	**317.0**	**146.3**	**120.8**	**214.7**	**91.5**	**81.1**	**85.0**	**120.9**	**88.1**	**97.3**	**137.1**
Average Number of Employees per Room		1.5	1.3	1.7	1.7	2.8	1.8	1.3	1.7	1.3	1.8	1.9	1.7	2.6

Average Percentage of Trained Employees Per Hotel

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur	Jaipur	Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*7*	*5*	*13*	*12*	*7*	*5*	*12*	*5*	*7*	*5*	*11*	*7*
Managers	99.1%	80.5%	100.0%	98.4%	69.9%	95.5%	100.0%	98.4%	90.0%	96.5%	94.2%	98.9%	96.7%
Supervisors	92.2	75.9	95.0	92.6	60.8	93.6	100.0	99.2	87.5	35.6	94.7	86.4	98.6
Staff	70.1	86.2	81.3	90.8	41.2	86.2	82.7	75.2	81.3	38.2	80.7	77.7	63.1
Total Avg. Trained Employees*	87.1	80.9	92.1	93.9	57.3	91.8	94.2	90.9	86.3	56.8	89.9	87.7	72.6
Total Avg. Un-Trained Employees	12.9	19.1	7.9	6.1	42.7	8.2	5.8	9.1	13.7	43.2	10.1	12.4	27.4

* Trained Employees includes those with a minimum one year certificate course in an educational institute; however, some hotels may have included those with short term (in-house) training.

TABLE 4-3: Indian Hotel Industry – Twelve Other Cities: Financial Report – Percentage of Revenue (2013-14)

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	**Five-Star Deluxe, Five-Star & Four-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Four-Star & Three-Star**	**Three-Star & Two-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star**	**Four-Star & Three-Star**	**Three-Star & Two-Star**	**Four-Star, Three-Star & Two-Star**	**Three-Star, Two-Star & One-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe & Heritage**
Number of Responses	*4*	*5*	*4*	*7*	*10*	*4*	*6*	*10*	*5*	*4*	*6*	*5*	*7*
Average Total Rooms Per Hotel:	**239**	**88**	**232**	**142**	**48**	**168**	**69**	**46**	**67**	**93**	**27**	**51**	**59**
Average Occupied Rooms Per Hotel:	**53,151**	**18,211**	**51,492**	**30,784**	**10,181**	**35,859**	**14,811**	**10,915**	**13,485**	**21,574**	**6,031**	**11,143**	**7,833**
Average Occupancy Per Hotel:	**62.9%**	**58.4%**	**58.5%**	**60.0%**	**58.9%**	**62.0%**	**56.5%**	**69.0%**	**59.8%**	**65.6%**	**63.9%**	**56.5%**	**42.5%**
Average Rate Per Hotel (₹):	**4,752**	**3,760**	**8,674**	**3,101**	**2,168**	**5,766**	**2,448**	**2,887**	**2,698**	**4,230**	**1,801**	**2,962**	**11,501**
REVENUE													
Rooms	51.3%	60.8%	54.3%	49.8%	45.1%	52.6%	55.7%	39.0%	45.8%	58.5%	49.1%	43.8%	59.9%
Food & Beverage	23.2	24.5	21.3	36.4	42.5	25.7	27.2	49.1	38.2	28.9	24.1	48.2	28.7
Banquet & Conferences	19.1	11.1	17.8	6.0	5.6	17.0	10.9	8.8	11.8	3.7	20.3	0.6	4.2
Telephone & Other	0.3	0.1	0.5	0.3	0.1	0.4	0.3	0.0	0.1	0.0	0.4	0.1	0.1
Minor Operated*	2.6	0.7	5.9	3.4	0.6	1.3	1.3	2.1	1.7	7.6	0.8	4.7	3.5
Rental & Other Income	3.5	2.9	0.2	4.1	6.1	3.0	4.6	1.0	2.6	1.3	5.3	2.7	3.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
DEPARTMENTAL EXPENSES													
Rooms	19.8	17.2	13.0	36.6	23.8	22.1	17.7	20.3	11.7	12.9	24.0	20.6	21.4
Food & Beverage	45.8	67.6	48.0	68.2	71.9	59.1	70.3	48.1	55.1	48.9	62.7	63.2	53.8
Telephone & Other	60.8	52.7	43.4	115.7	429.4	92.0	64.1	273.8	155.4	141.6	319.0	139.0	79.4
Minor Operated*	56.5	34.1	72.1	16.9	197.2	34.2	113.4	45.0	61.2	67.3	208.2	41.4	49.7
Rental & Other Income	0.0	10.0	0.0	0.3	5.0	0.0	0.0	110.6	19.8	0.0	32.3	0.0	13.7
Total	31.2	35.1	30.3	48.1	47.2	37.6	38.3	37.9	34.6	28.7	44.2	41.9	32.9
DEPARTMENTAL INCOME	68.8	64.9	69.7	51.9	52.8	62.4	61.7	62.2	65.4	71.4	55.8	58.1	67.1
OPERATING EXPENSES													
Administrative & General	14.1	6.4	6.7	5.7	5.1	11.6	14.4	7.1	16.2	5.9	6.3	10.8	8.5
Management Fee	3.1	3.0	3.8	0.1	1.2	3.4	2.4	0.9	0.4	4.2	1.7	0.1	1.0
Marketing	2.5	2.7	5.1	1.5	0.9	6.2	3.2	1.4	1.8	2.7	4.3	2.9	3.5
Franchise Fees	1.1	0.0	0.0	0.0	0.0	0.2	0.8	0.1	0.1	0.6	1.8	0.0	0.0
Property Operations & Maintenance	6.1	2.6	4.3	4.5	3.2	3.9	3.7	7.7	10.4	4.8	6.2	7.2	6.5
Energy	12.6	13.5	9.5	10.9	13.1	10.2	11.2	11.1	11.1	8.5	15.7	11.0	7.1
Total	39.5	28.2	29.4	22.8	23.4	35.5	35.6	28.4	39.8	26.7	35.9	32.0	26.6
HOUSE PROFIT	29.3	36.7	40.3	29.2	29.4	26.9	26.1	33.8	25.6	44.6	19.9	26.1	40.6
FIXED EXPENSES													
Property Taxes	0.3	2.0	0.0	1.2	1.1	0.7	0.1	0.4	0.7	1.5	2.4	0.5	0.0
Insurance	0.3	0.2	0.1	0.2	0.3	0.2	0.3	0.1	0.3	0.7	1.0	0.1	0.1
Other Fixed Charges	0.9	0.0	4.2	0.2	1.6	0.6	0.5	0.9	0.3	3.5	1.2	0.5	0.6
Rent	0.0	0.1	0.0	0.4	2.8	0.1	0.3	0.2	0.2	3.9	0.2	0.0	0.3
Total	1.4	2.3	4.3	2.1	5.8	1.6	1.1	1.6	1.4	9.5	4.8	1.1	1.0
NET INCOME**	27.9%	34.4%	36.0%	27.1%	23.6%	25.2%	25.0%	32.2%	24.2%	35.1%	15.1%	25.0%	39.6%

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth

** Net Income is before depreciation, interest payments and taxes

TABLE 4-4: Indian Hotel Industry – Twelve Other Cities: Financial Report – Amount Per Available Room (2013-14)

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*5*	*4*	*7*	*10*	*4*	*6*	*10*	*5*	*4*	*6*	*5*	*7*
Average Total Rooms Per Hotel:	**239**	**88**	**232**	**142**	**48**	**168**	**69**	**46**	**67**	**93**	**27**	**51**	**59**
Average Occupied Rooms Per Hotel:	**53,151**	**18,211**	**51,492**	**30,784**	**10,181**	**35,859**	**14,811**	**10,915**	**13,485**	**21,574**	**6,031**	**11,143**	**7,833**
Average Occupancy Per Hotel:	**62.9%**	**58.4%**	**58.5%**	**60.0%**	**58.9%**	**62.0%**	**56.5%**	**69.0%**	**59.8%**	**65.6%**	**63.9%**	**56.5%**	**42.5%**
Average Rate Per Hotel (₹)	**4,752**	**3,760**	**8,674**	**3,101**	**2,168**	**5,766**	**2,448**	**2,887**	**2,698**	**4,230**	**1,801**	**2,962**	**11,501**
REVENUE (₹)													
Rooms	10,60,189	7,73,333	21,37,137	6,71,123	4,56,134	11,73,284	5,24,142	6,92,682	5,35,848	9,86,668	4,02,340	6,42,141	25,51,049
Food & Beverage	4,78,908	3,12,135	8,37,137	4,90,766	4,30,156	5,72,248	2,56,466	8,72,415	4,46,985	4,88,078	1,97,259	7,06,432	12,23,726
Banquet & Conferences	3,94,375	1,41,554	7,01,507	80,551	56,809	3,80,027	1,02,507	1,57,078	1,37,737	62,581	1,66,506	8,948	1,80,414
Telephone & Other	6,747	1,289	19,591	3,582	588	7,833	2,480	552	1,206	384	3,086	878	5,655
Minor Operated*	53,854	8,459	2,33,563	45,644	6,417	28,712	12,164	38,043	19,520	1,28,832	6,500	68,192	1,49,237
Rental & Other Income	72,643	36,287	8,073	54,944	61,192	67,716	43,689	17,285	29,839	21,076	43,549	39,389	1,47,123
Total	20,66,716	12,73,057	39,37,008	13,46,609	10,11,298	22,29,819	9,41,448	17,78,056	11,71,136	16,87,619	8,19,241	14,65,980	42,57,203
DEPARTMENTAL EXPENSES (₹)													
Rooms	2,10,262	1,33,331	2,77,395	2,45,501	1,08,618	2,59,172	92,639	1,40,640	62,925	1,27,149	96,537	1,32,365	5,45,617
Food & Beverage	4,00,179	3,06,853	7,38,859	3,89,652	3,50,086	5,62,400	2,52,323	4,94,703	3,22,401	2,69,186	2,28,136	4,52,355	7,55,789
Telephone & Other	4,104	679	8,504	4,146	2,526	7,209	1,590	1,512	1,874	543	9,846	1,221	4,491
Minor Operated*	30,423	2,884	1,68,461	7,720	12,655	9,810	13,790	17,101	11,943	86,643	13,531	28,219	74,106
Rental & Other Income	-	3,622	-	181	3,041	-	-	19,112	5,907	-	14,068	-	20,117
Total	6,44,969	4,47,369	11,93,219	6,47,200	4,76,926	8,38,591	3,60,342	6,73,068	4,05,050	4,83,522	3,62,117	6,14,160	14,00,120
DEPARTMENTAL INCOME (₹)	14,21,747	8,25,688	27,43,789	6,99,410	5,34,372	13,91,228	5,81,106	11,04,988	7,66,085	12,04,097	4,57,123	8,51,821	28,57,083
OPERATING EXPENSES (₹)													
Administrative & General	2,90,366	81,706	2,63,402	76,673	51,368	2,57,704	1,35,427	1,26,352	1,89,082	1,00,146	51,327	1,58,773	3,62,934
Management Fee	63,505	38,138	1,48,116	1,566	11,783	75,119	22,557	16,699	4,527	70,008	13,580	660	41,889
Marketing	52,081	33,919	2,01,184	20,571	9,310	1,38,745	29,836	25,103	20,959	46,035	35,463	42,761	1,47,503
Franchise Fees	23,648	-	-	-	-	4,548	7,229	2,382	719	10,811	14,389	-	371
Property Operations & Maintenance	1,25,289	33,661	1,69,322	60,629	32,001	87,846	35,173	1,36,927	1,21,817	81,343	50,599	1,04,785	2,76,337
Energy	2,61,187	1,71,372	3,75,457	1,47,168	1,32,301	2,28,407	1,05,277	1,96,582	1,29,400	1,42,586	1,28,778	1,61,881	3,01,769
Total	8,16,076	3,58,796	11,57,481	3,06,607	2,36,763	7,92,370	3,35,499	5,04,046	4,66,504	4,50,930	2,94,136	4,68,861	11,30,803
HOUSE PROFIT (₹)	6,05,672	4,66,892	15,86,308	3,92,802	2,97,609	5,98,858	2,45,607	6,00,942	2,99,582	7,53,168	1,62,988	3,82,960	17,26,281
FIXED EXPENSES (₹)													
Property Taxes	5,067	25,864	1,615	15,994	10,662	14,881	899	7,448	7,602	24,976	19,802	7,405	532
Insurance	6,758	2,552	4,198	3,211	2,826	5,040	2,412	2,521	2,964	11,659	8,451	2,097	5,500
Other Fixed Charges	17,732	-	1,64,263	2,893	16,504	13,010	4,643	15,495	3,593	58,919	9,877	7,263	24,040
Rent	152	805	-	5,932	28,715	3,087	2,320	3,297	2,156	65,103	1,235	-	11,509
Total	29,709	29,222	1,70,075	28,029	58,707	36,018	10,275	28,760	16,314	1,60,657	39,364	16,765	41,580
NET INCOME (₹)**	5,75,962	4,37,670	14,16,233	3,64,773	2,38,901	5,62,840	2,35,333	5,72,181	2,83,268	5,92,511	1,23,623	3,66,195	16,84,700

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth

** Net Income is before depreciation, interest payments and taxes

TABLE 4-5: Indian Hotel Industry – Twelve Other Cities: Financial Report – Amount Per Occupied Room (2014-15)

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	**Five-Star Deluxe, Five-Star & Four-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Four-Star & Three-Star**	**Three-Star & Two-Star**	**Five-Star Deluxe, Five-Star & Four-Star**	**Three-Star**	**Four-Star & Three-Star**	**Three-Star & Two-Star**	**Four-Star, Three-Star & Two-Star**	**Three-Star, Two-Star & One-Star**	**Four-Star & Three-Star**	**Five-Star Deluxe & Heritage**
Number of Responses	*4*	*5*	*4*	*7*	*10*	*4*	*6*	*10*	*5*	*4*	*6*	*5*	*7*
Average Total Rooms Per Hotel:	**239**	**88**	**232**	**142**	**48**	**168**	**69**	**46**	**67**	**93**	**27**	**51**	**59**
Average Occupied Rooms Per Hotel:	**53,151**	**18,211**	**51,492**	**30,784**	**10,181**	**35,859**	**14,811**	**10,915**	**13,485**	**21,574**	**6,031**	**11,143**	**7,833**
Average Occupancy Per Hotel:	**62.9%**	**58.4%**	**58.5%**	**60.0%**	**58.9%**	**62.0%**	**56.5%**	**69.0%**	**59.8%**	**65.6%**	**63.9%**	**56.5%**	**42.5%**
Average Rate Per Hotel (₹):	**4,752**	**3,760**	**8,674**	**3,101**	**2,168**	**5,766**	**2,448**	**2,887**	**2,698**	**4,230**	**1,801**	**2,962**	**11,501**
REVENUE (₹)													
Rooms	4,752	3,754	8,945	3,102	2,168	5,480	2,448	2,888	2,654	4,230	1,801	2,962	16,283
Food & Beverage	2,147	1,515	3,504	2,268	2,045	2,673	1,198	3,637	2,214	2,093	883	3,259	7,811
Banquet & Conferences	1,768	687	2,936	372	270	1,775	479	655	682	268	745	41	1,152
Telephone & Other	30	6	82	17	3	37	12	2	6	2	14	4	36
Minor Operated*	241	41	978	211	31	134	57	159	97	552	29	315	953
Rental & Other Income	326	176	34	254	291	316	204	72	148	90	195	182	939
Total	9,264	6,180	16,478	6,224	4,808	10,416	4,396	7,412	5,802	7,236	3,668	6,762	27,174
DEPARTMENTAL EXPENSES (₹)													
Rooms	943	647	1,161	1,135	516	1,211	433	586	312	545	432	611	3,483
Food & Beverage	1,794	1,490	3,092	1,801	1,664	2,627	1,178	2,062	1,597	1,154	1,021	2,087	4,824
Telephone & Other	18	3	36	19	12	34	7	6	9	2	44	6	29
Minor Operated*	136	14	705	36	60	46	64	71	59	371	61	130	473
Rental & Other Income	-	18	-	1	14	-	-	80	29	-	63	-	128
Total	2,891	2,172	4,994	2,991	2,267	3,917	1,683	2,806	2,007	2,073	1,621	2,833	8,937
DEPARTMENTAL INCOME (₹)	6,373	4,008	11,484	3,233	2,540	6,498	2,714	4,606	3,795	5,163	2,046	3,929	18,237
OPERATING EXPENSES (₹)													
Administrative & General	1,302	397	1,102	354	244	1,204	632	527	937	429	230	732	2,317
Management Fee	285	185	620	7	56	351	105	70	22	300	61	3	267
Marketing	233	165	842	95	44	648	139	105	104	197	159	197	942
Franchise Fees	106	-	-	-	-	21	34	10	4	46	64	-	2
Property Operations & Maintenance	562	163	709	280	152	410	164	571	603	349	227	483	1,764
Energy	1,171	832	1,571	680	629	1,067	492	820	641	611	577	747	1,926
Total	3,658	1,742	4,844	1,417	1,126	3,701	1,567	2,101	2,311	1,933	1,317	2,163	7,218
HOUSE PROFIT (₹)	2,715	2,266	6,639	1,816	1,415	2,797	1,147	2,505	1,484	3,229	730	1,766	11,019
FIXED EXPENSES (₹)													
Property Taxes	23	126	7	74	51	70	4	31	38	107	89	34	3
Insurance	30	12	18	15	13	24	11	11	15	50	38	10	35
Other Fixed Charges	79	-	687	13	78	61	22	65	18	253	44	34	153
Rent	1	4	-	27	137	14	11	14	11	279	6	-	73
Total	133	142	712	130	279	168	48	120	81	689	176	77	265
NET INCOME (₹)**	2,582	2,125	5,927	1,686	1,136	2,629	1,099	2,385	1,403	2,540	553	1,689	10,753

* Minor operated departments include laundry, gift shop, business centre, news stand, sports, health club, garage, parking and so forth
** Net Income is before depreciation, interest payments and taxes

TABLE 4-6: Indian Hotel Industry – Twelve Other Cities: Market Data

Market Segmentation

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*7*	*6*	*10*	*11*	*7*	*6*	*13*	*5*	*7*	*7*	*11*	*7*
Airline Crew	0.0%	3.4%	2.5%	3.1%	0.0%	0.6%	0.0%	1.0%	1.0%	0.0%	0.7%	0.2%	39.0%
Business Traveller - Domestic	2.5	50.0	16.1	37.7	46.7	18.3	27.6	23.9	18.0	23.1	35.6	27.3	5.7
Business Traveller - Foreign	5.1	8.4	42.2	6.0	10.0	10.0	4.8	5.9	5.2	8.7	5.7	3.9	3.7
Complimentary Rooms	3.5	0.3	2.5	2.6	3.3	1.7	1.1	1.2	1.6	2.4	1.1	1.1	4.2
Tourists / Leisure FIT - Domestic	13.0	12.4	11.2	14.7	6.9	12.6	11.0	27.5	11.2	26.3	25.7	20.0	27.9
Tourists / Leisure FIT - Foreign	16.0	3.9	1.1	1.3	1.6	9.9	5.0	10.0	17.2	6.4	1.0	16.0	24.9
Meeting Participants (Less than 100 Attendees)	7.7	2.1	0.7	3.6	7.7	6.1	5.8	5.3	3.0	6.1	3.9	6.2	2.3
Meeting Participants (Over 100 Attendees)	9.8	11.1	19.8	17.3	5.5	6.4	10.1	6.5	5.6	6.1	6.1	4.7	2.7
Tour Groups - Domestic	4.8	2.4	0.8	3.1	11.1	12.2	10.2	14.2	14.8	14.1	7.9	13.6	6.6
Tour Groups - Foreign	35.3	1.7	2.8	2.5	0.4	18.4	9.7	4.4	20.6	5.0	2.1	6.4	11.9
Other	2.4	4.3	0.3	8.3	6.8	3.8	14.8	0.2	1.8	1.6	10.1	0.6	9.8
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Country of Origin of Guests

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star &Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star &Two-Star	Four-Star, Three Star & Two Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*ID*	*5*	*6*	*8*	*5*	*6*	*ID*	*9*	*5*	*4*	*5*	*9*	*6*
ASEAN*		3.6%	6.6%	1.3%	7.2%	2.2%		15.2%	5.4%	4.0%	8.0%	1.7%	1.8%
Australia		4.8	3.2	1.8	6.0	4.5		5.4	2.4	2.5	2.3	2.1	6.7
Canada		1.6	1.5	0.9	1.0	5.5		2.5	3.4	3.0	4.1	3.2	2.6
Caribbean		0.2	0.0	2.6	0.0	0.2		1.7	0.0	0.0	5.8	0.6	0.3
China		7.6	3.5	8.3	10.6	4.4		3.1	5.0	1.0	14.8	1.6	1.7
France		4.4	1.7	1.3	5.6	9.5		3.7	19.8	4.8	1.0	3.5	23.5
Germany		6.6	2.9	1.5	4.0	3.9		5.3	11.0	17.0	2.1	13.5	5.1
Japan		3.8	22.3	1.3	8.2	8.3		2.8	4.0	2.5	2.8	1.6	0.3
Middle east		2.0	3.3	2.4	6.2	1.6		15.1	2.4	2.0	5.1	10.3	1.4
Other European Nations		14.2	1.4	15.0	6.6	5.7		6.8	7.2	4.5	2.6	4.8	14.3
Russia		3.4	0.5	1.3	0.4	2.5		1.6	5.0	0.5	7.6	7.1	0.3
SAARC **		2.2	3.2	1.5	3.2	13.7		10.6	5.4	1.0	0.0	2.7	0.9
South Africa		1.0	0.7	0.4	0.2	1.6		5.5	2.8	2.0	3.5	1.4	0.7
UK		20.6	10.7	6.5	12.6	8.2		8.2	5.4	17.0	4.6	14.7	13.8
USA		18.8	14.8	13.3	28.2	18.3		6.5	7.8	22.3	3.0	5.2	9.7
Other		5.2	23.8	40.6	0.0	10.0		5.9	13.0	16.0	32.7	26.2	17.2
Total		**100.0**	**100.0**	**100.0**	**100.0**	**100.0**		**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

* ASEAN: Association of South East Asian Nations - Indonesia, Malaysia, Philippines, Singapore, Thailand, Vietnam, Laos, Cambodia, Brunei Darussalam

** SAARC: South Asian Association for Regional Co-operation - India, Pakistan, Bangladesh, Sri Lanka, Nepal, Bhutan, Maldives

ID: Insufficient Data

TABLE 4-7: Indian Hotel Industry – Twelve Other Cities: Monthly and Daily Occupancy

Average Monthly Occupancy

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*6*	*7*	*12*	*11*	*7*	*6*	*13*	*5*	*7*	*6*	*11*	*7*
January	65.5%	64.5%	60.6%	47.2%	63.3%	61.0%	69.3%	72.9%	68.6%	62.1%	59.3%	69.7%	44.4%
February	75.3	57.3	75.0	53.8	64.6	65.7	73.5	68.1	65.2	54.3	57.3	69.8	55.0
March	71.5	46.5	66.9	50.8	55.1	52.9	56.8	59.6	54.8	49.4	52.5	57.6	40.3
April	58.3	47.2	66.3	44.7	57.3	58.9	50.5	58.4	43.0	57.7	50.5	51.2	29.6
May	36.5	47.2	55.9	46.3	59.3	50.9	36.7	63.5	40.2	83.1	53.0	49.5	15.9
June	39.0	48.2	57.3	52.5	59.6	53.0	34.0	53.9	42.2	52.6	45.0	43.6	16.4
July	42.0	51.8	58.3	52.3	53.4	53.4	40.8	53.3	42.4	51.6	46.5	48.3	26.0
August	50.3	53.5	52.4	52.1	52.5	59.7	43.5	65.7	49.8	57.6	50.5	51.1	36.3
September	50.8	63.8	60.1	48.3	58.9	60.3	47.3	63.3	54.0	65.7	53.3	55.6	29.0
October	60.0	48.5	57.7	47.7	56.9	61.9	59.5	66.0	55.8	68.7	61.7	59.9	48.0
November	74.3	67.2	71.7	58.0	65.9	74.9	73.8	72.1	64.0	57.0	64.7	68.6	45.3
December	66.8	71.0	63.4	60.3	67.9	76.4	77.0	76.2	57.2	65.9	64.8	68.6	51.4

Average Daily Occupancy

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*ID*	*8*	*8*	*10*	*10*	*7*	*5*	*12*	*5*	*8*	*5*	*10*	*7*
Monday		52.8%	59.1%	41.1%	59.7%	59.6%	44.0%	58.8%	45.8%	49.0%	45.8%	47.3%	29.7%
Tuesday		59.0	64.6	43.6	63.0	57.3	44.0	57.8	55.2	48.4	55.2	54.0	27.4
Wednesday		61.8	63.0	57.7	62.9	60.6	47.6	59.3	57.6	56.1	57.6	58.1	29.9
Thursday		61.0	59.3	54.4	63.8	61.9	51.0	51.4	45.6	61.6	45.6	57.1	33.0
Friday		51.1	60.4	49.9	60.0	63.7	54.0	53.8	46.0	68.9	46.0	52.0	44.7
Saturday		39.9	55.1	49.4	53.8	64.1	62.0	52.3	44.2	80.6	44.2	46.6	44.7
Sunday		36.4	47.4	43.3	50.3	58.4	51.0	50.4	43.0	69.9	43.0	38.7	36.0

ID: Insufficient Data

TABLE 4-8: Indian Hotel Industry – Twelve Other Cities: Sources of Reservation

Source of Advance Reservations

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*7*	*8*	*9*	*10*	*5*	*5*	*13*	*5*	*7*	*6*	*10*	*7*
Chain CRS (Central Reservations System)	2.0%	3.0%	8.9%	1.7%	0.0%	7.5%	0.0%	0.9%	2.2%	64.3%	2.0%	4.2%	12.3%
Direct Enquiry / Hotel Representative	21.1	62.3	46.9	49.8	53.6	23.3	41.0	31.5	24.6	34.6	64.0	22.3	42.5
Global Distribution System (GDS)	2.1	3.9	8.4	1.2	0.0	3.0	1.2	1.6	0.2	0.4	0.7	0.3	0.6
Hotel / Chain Website	7.3	5.0	9.0	4.6	8.4	5.5	7.4	6.5	5.8	9.0	5.5	9.1	8.2
Travel Agent & Tour Operator	48.4	9.3	6.2	13.7	11.2	30.3	21.6	35.6	48.8	31.1	8.8	26.5	18.4
Online Reservations Systems	5.9	6.6	5.9	8.2	8.5	8.7	10.2	9.6	6.4	4.3	4.0	10.3	8.9
Regional Sales Office	11.5	7.0	6.5	14.5	2.0	18.2	9.6	2.9	7.0	4.3	6.5	19.8	7.7
Other	1.8	3.0	8.2	6.4	16.3	3.5	9.0	11.2	5.0	9.9	8.5	7.5	1.6
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

TABLE 4-9: Indian Hotel Industry – Twelve Other Cities: Marketing Media

Marketing Media – Percentage of Hotels Using Each Media

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*8*	*8*	*13*	*12*	*7*	*6*	*13*	*5*	*8*	*7*	*10*	*6*
Consumer Central Media	25.0%	50.0%	37.5%	38.5%	0.0%	28.6%	50.0%	23.1%	20.0%	25.0%	14.3%	10.0%	16.7%
Direct Mail	100.0	87.5	75.0	100.0	66.7	100.0	83.3	84.6	80.0	75.0	71.4	80.0	100.0
Hotel Website	100.0	87.5	100.0	84.6	66.7	85.7	100.0	92.3	100.0	87.5	71.4	90.0	100.0
Loyalty Card Programme	75.0	87.5	75.0	53.9	25.0	85.7	66.7	46.2	0.0	12.5	14.3	10.0	66.7
Merchandising	100.0	75.0	37.5	30.8	25.0	42.9	66.7	46.2	40.0	50.0	14.3	10.0	83.3
Other Internet sites	75.0	100.0	87.5	76.9	33.3	85.7	83.3	76.9	60.0	37.5	57.1	70.0	50.0
Outdoor Advertising	100.0	75.0	50.0	61.5	33.3	85.7	83.3	84.6	80.0	75.0	42.9	40.0	66.7
Pay Per Click	50.0	12.5	50.0	38.5	16.7	14.3	50.0	15.4	0.0	12.5	0.0	10.0	0.0
Print Advertising	100.0	75.0	87.5	92.3	58.3	100.0	100.0	92.3	80.0	100.0	85.7	80.0	83.3
Promotions	100.0	87.5	87.5	84.6	33.3	100.0	100.0	84.6	60.0	75.0	71.4	80.0	83.3
Radio Advertising	100.0	50.0	37.5	38.5	50.0	28.6	50.0	38.5	0.0	25.0	28.6	10.0	0.0
Telemarketing	75.0	75.0	37.5	61.5	41.7	71.4	66.7	69.2	100.0	37.5	14.3	50.0	66.7
TV Advertising	75.0	50.0	12.5	23.1	0.0	0.0	0.0	38.5	40.0	12.5	14.3	20.0	83.3
Viral Marketing	50.0	25.0	50.0	30.8	8.3	28.6	33.3	15.4	20.0	12.5	0.0	10.0	0.0

TABLE 4-10: Indian Hotel Industry – Twelve Other Cities: Payment Methods

Payment Methods Used

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*8*	*8*	*11*	*12*	*7*	*6*	*12*	*5*	*8*	*6*	*10*	*7*
Cash Sales	13.7%	15.6%	13.4%	28.6%	52.8%	29.4%	32.6%	28.0%	31.6%	37.5%	59.8%	22.0%	25.4%
Credit Card Sales	28.5	45.6	54.1	35.5	23.2	27.9	29.3	36.5	31.4	29.3	15.8	35.5	27.6
Credit Sales (Other Than Cards)	38.0	32.8	28.1	25.0	17.2	28.2	26.1	24.3	25.8	16.6	18.0	21.8	31.8
Electronic Fund Transfer	19.8	6.0	4.4	10.9	6.9	14.5	12.0	11.2	11.2	16.6	6.3	20.7	15.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Credit Cards Used

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*6*	*8*	*9*	*11*	*7*	*6*	*12*	*4*	*7*	*6*	*8*	*7*
American Express	12.9%	8.8%	28.8%	6.9%	4.1%	20.9%	12.5%	10.3%	13.5%	7.7%	5.8%	9.4%	16.4%
Diners Club	-	3.3	1.9	1.2	2.7	0.3	-	0.5	5.3	-	1.7	0.6	0.0
Mastercard / Eurocard	30.1	35.3	30.0	46.4	49.6	34.0	36.2	37.5	32.0	39.4	50.8	35.0	24.7
Visa	31.4	50.0	38.2	42.6	42.5	44.4	48.8	44.0	44.3	50.7	37.5	48.8	57.9
Other	25.7	2.5	1.1	2.9	1.2	0.4	2.5	7.7	5.0	2.1	4.2	6.3	1.0
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Average Credit Card Commission

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*6*	*8*	*8*	*7*	*5*	*4*	*10*	*ID*	*5*	*ID*	*3*	*7*
American Express	3.4	2.7	3.4	2.9	3.0	3.5	2.5	3.7		1.5		3.9	3.3
Diners Club	0.0	0.0	1.1	1.2	0.0	0.5	0.0	0.3		0.3		0.0	0.3
Mastercard / Eurocard	1.4	1.2	1.1	1.7	1.5	1.3	1.3	1.3		1.5		1.5	1.2
Visa	1.4	1.0	1.3	1.7	1.7	1.3	1.3	1.3		1.5		1.3	1.3
Other	0.0	0.0	0.0	0.3	0.0	0.0	0.4	0.2		0.6		0.0	0.0

ID: Insufficient Data

TABLE 4-11: Indian Hotel Industry – Twelve Other Cities: Technology

Technology in Hotels – Percentage of Hotels Using Each Technology

	Agra	Ahm'bad	Gurgaon	Hyderabad	Indore	Jaipur		Kochi	Madurai	Mysore	Nashik	Thiru'puram	Udaipur
COMPOSITION	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Five-Star Deluxe, Five-Star & Four-Star	Four-Star & Three-Star	Three-Star & Two-Star	Five-Star Deluxe, Five-Star & Four-Star	Three-Star	Four-Star & Three-Star	Three-Star & Two-Star	Four-Star, Three-Star & Two-Star	Three-Star, Two-Star & One-Star	Four-Star & Three-Star	Five-Star Deluxe & Heritage
Number of Responses	*4*	*8*	*8*	*10*	*12*	*5*	*6*	*11*	*4*	*6*	*6*	*8*	*6*
Accounting System	100.0%	87.5%	100.0%	100.0%	100.0%	60.0%	100.0%	90.9%	100.0%	100.0%	100.0%	90.0%	83.3%
Call Accounting System	100.0	62.5	62.5	60.0	50.0	80.0	83.3	63.6	100.0	33.3	33.3	60.0	16.7
Central Reservations System (CRS)	100.0	75.0	62.5	60.0	50.0	80.0	33.3	36.4	0.0	16.7	16.7	30.0	83.3
Electronic Keycard	100.0	87.5	87.5	90.0	33.3	80.0	83.3	36.4	25.0	0.0	50.0	30.0	33.3
Energy Management System	25.0	50.0	37.5	70.0	16.7	20.0	50.0	45.5	25.0	0.0	0.0	50.0	16.7
Internet / E-Mail	75.0	100.0	87.5	100.0	100.0	80.0	100.0	100.0	100.0	66.7	100.0	100.0	83.3
Internet / Website	50.0	100.0	87.5	100.0	91.7	80.0	100.0	90.9	100.0	66.7	66.7	90.0	100.0
Intranet System	25.0	75.0	37.5	70.0	58.3	40.0	33.3	54.6	50.0	16.7	33.3	60.0	83.3
Local Area Network (LAN)	75.0	87.5	62.5	100.0	91.7	80.0	100.0	100.0	100.0	83.3	83.3	100.0	66.7
Management Information System	75.0	62.5	50.0	80.0	58.3	60.0	83.3	81.8	50.0	66.7	33.3	80.0	66.7
Point of Sale System for Food and Beverage	100.0	75.0	87.5	80.0	83.3	100.0	100.0	72.7	100.0	66.7	33.3	70.0	66.7
Property Management System	75.0	87.5	100.0	70.0	41.7	80.0	50.0	54.6	50.0	33.3	83.3	50.0	33.3
Yield Management System	25.0	62.5	37.5	70.0	16.7	0.0	50.0	36.4	50.0	0.0	16.7	40.0	0.0
Other	50.0	25.0	12.5	30.0	0.0	20.0	33.3	9.1	0.0	0.0	16.7	10.0	0.0

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