

THE INDIAN HOTEL OWNERS' SENTIMENT SURVEY 2022

With two preceding editions in 2013 and 2016, Hotelivate is pleased to share the results of our third **Indian Hotel Owners' Sentiment Survey 2022**. With the world a different place from when we last collected responses, this survey was aimed at highlighting the opinions, perceptions and concerns of Indian Hotel Owners in a post-pandemic world. While a few of these remain unchanged since the last survey conducted in 2016, several new challenges and demands of the Indian Hotel Owner have emerged this year. Hotelivate thanks the participants for their valuable inputs and time, hoping that this effort will continue to be successful in serving as the voice of Indian Hotel Owners.

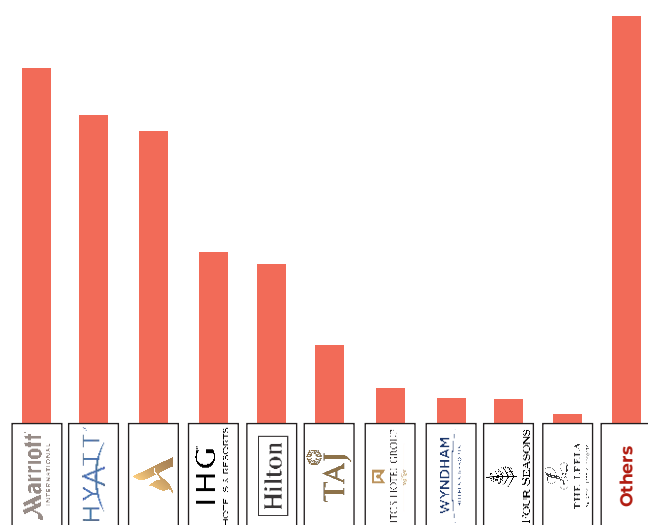
It is important to note that the information received from the survey participants has been statistically aggregated and is not representative of Hotelivate's or any individual's view in any manner.

THE SAMPLE SET

Data collection for the survey began in February 2022, marked by the dispatch of a self-reporting survey format (online) to all Hotel Owners in Hotelivate's database. Responses were received from a diverse sample set collectively owning ~30,000 hotel rooms across branded as well as independent hotels. This sample set represents ~21% of the country's branded hotel inventory across varied market positioning and locations. The Owners collectively have/ are about to have/ had in the past an affiliation with ~22 brands (domestic and international) allowing for unbiased and independent responses to the questions posed in the survey.

PRODUCT PROFILE

Brand Representation: Top 10 Brands Represented in the Survey

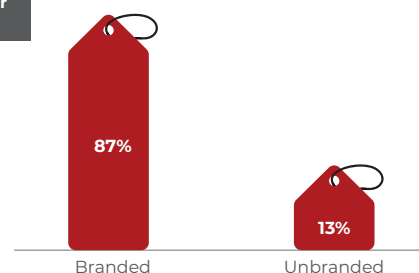


How many Hotels do you/does your organisation own in India?

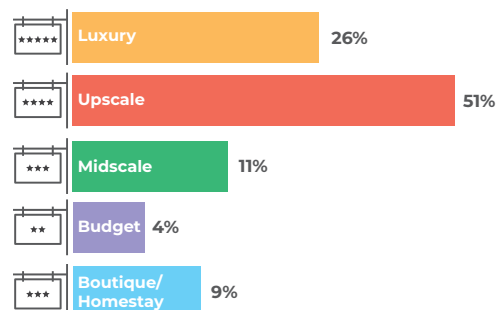


30,230
How many rooms do you/does your organisation own in India totally?

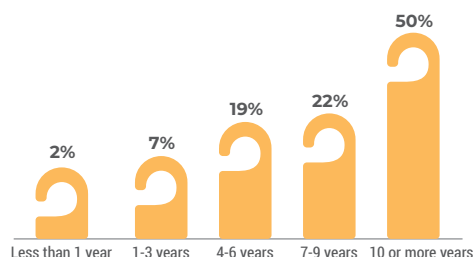
Are the majority of the hotels in your portfolio branded or unbranded?



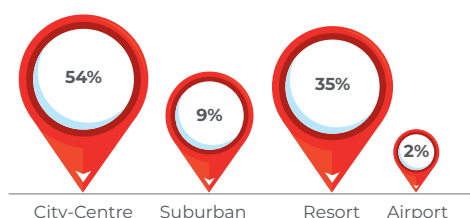
Which Positioning does most of your hotel portfolio fall in?



What is the average age of your hotels?



Which type of locations are most of your hotels situated in?



~55% of the Hotels in the sample set are located in city-centres and ~51% are Upscale hotels. Contrary to the previous surveys, 50% of this year's sample set has been operating for 10 years or more. This sample set represents the highest number of Resorts (~35%) by far across three editions of this survey.

POST-PANDEMIC SENTIMENTS

During/ post the COVID-19 pandemic, what were/ are the top challenges faced by you as a hotel owner?

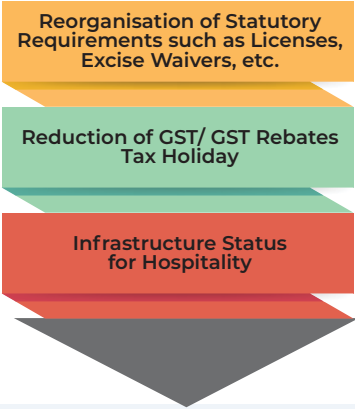


Maharashtra Government Announced Reforms for Hospitality Industry

The Maharashtra State Cabinet's decision to award Industry Status to the Hospitality sector effective 1st of April 2021 has enabled hotels to avail benefits such as rebates in electricity charges, water, and property taxes.

The Ease of Doing Business policy that was also approved has uplifted the spirits for the Hospitality industry as the number of licenses imperative to start a business has gone down from 70 to 10. Further, there are plans to bring all these permissions on to a single platform.

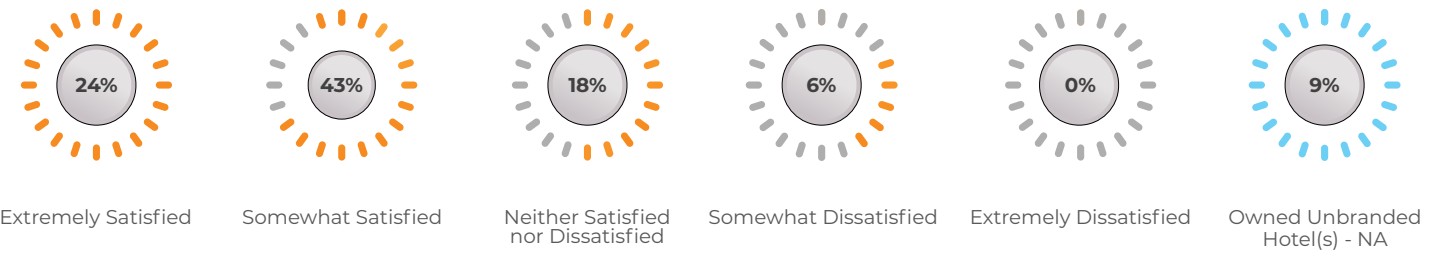
Given the option, what would be your top demands from the Govt. of India?



How do you feel about the Government's response to the Hotel sector since the start of COVID-19 in India?



How do you feel about the Hotel Brand's response and handling since the start of COVID-19 in India?

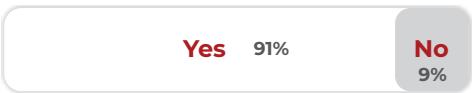


1/3rd Hotel Owners dissatisfied with Government response

2/3rd Hotel Owners satisfied with Hotel Brand response

THE VALUE OF BRANDING

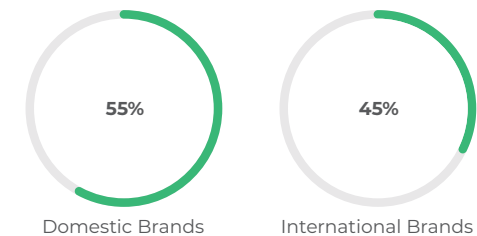
Do you think brands add value to your hotels?



How satisfied are you with the performance of your current hotel brand(s)?

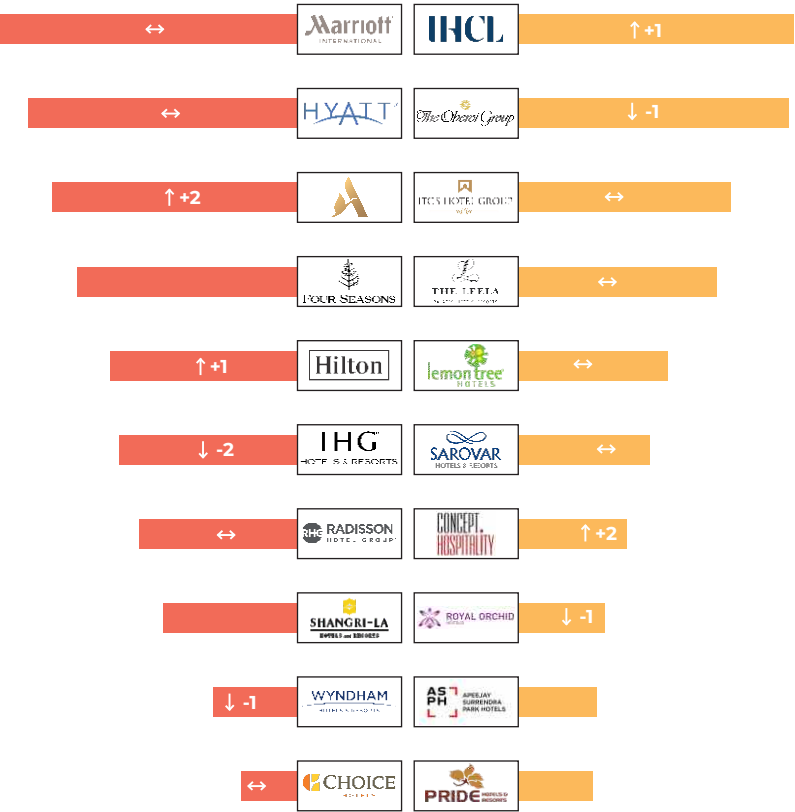


Who according to you are better hotel operators?



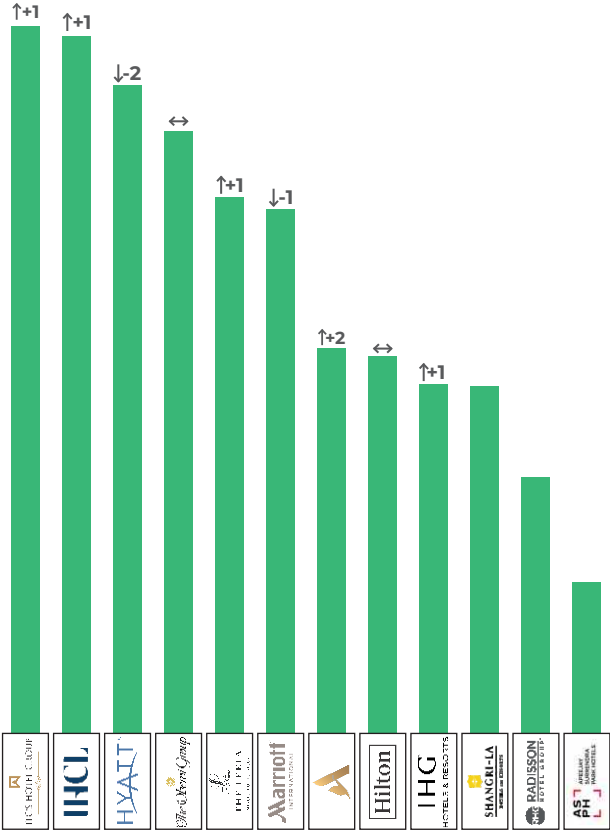
More Owners have shown preference for Domestic Brands than International ones this year.

Most Preferred International Brands



Most Preferred Domestic Brands

Most Preferred F&B Brands



Most Preferred New Boutique Brands

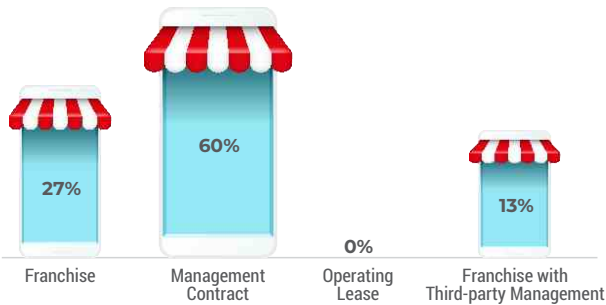


Most Preferred Homestay Brands

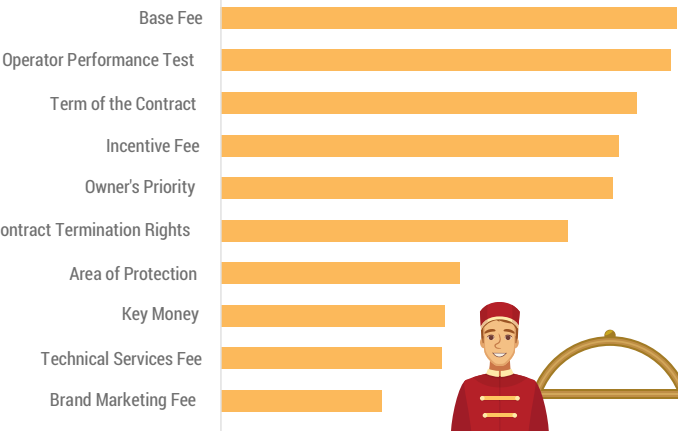


OPERATING MODELS

If all options were available, which form of engagement would you prefer with a brand?



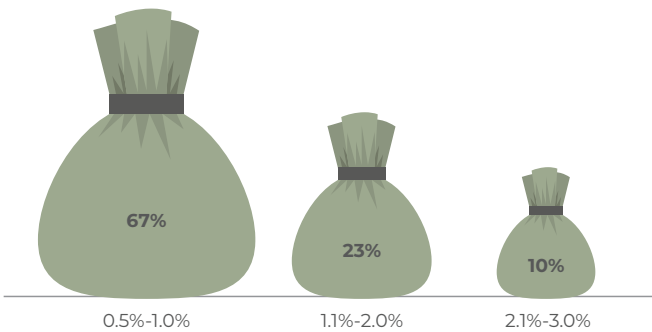
While evaluating a management contract, what is most important to you?



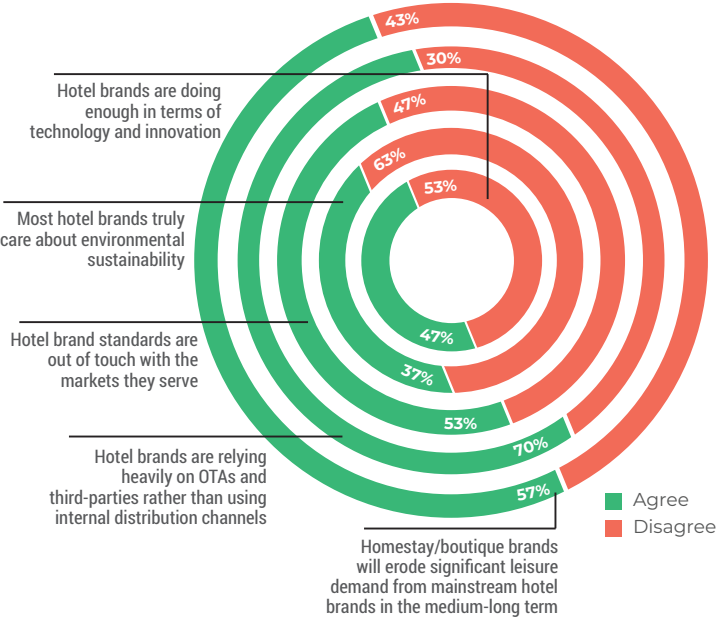
Owner's Priority appears to have lost importance to Term of the Contract as the 3rd most important item this year as compared to 2016.



How much more are you willing to pay as Base Fee to be able to terminate the contract with the brand at will?

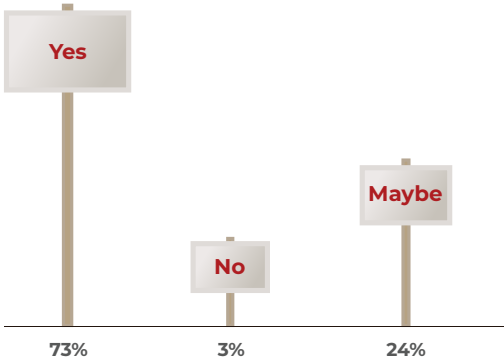


Please select whether you Agree or Disagree with the following statements

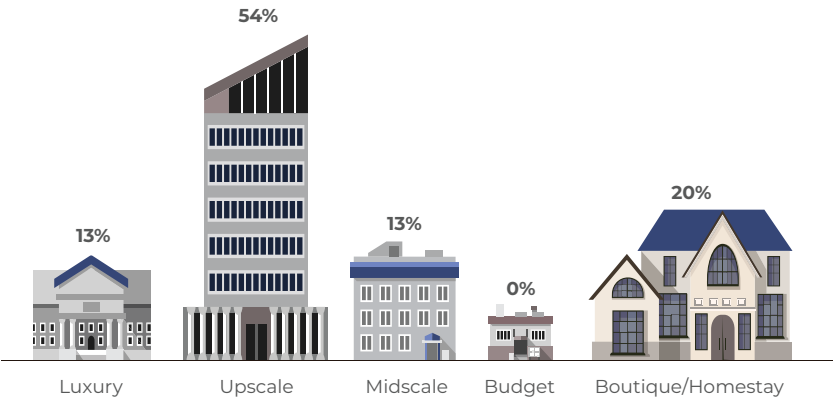


OUTLOOK

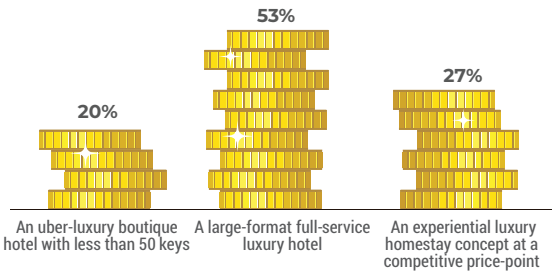
Do you plan on investing in the hotel sector, going forward?



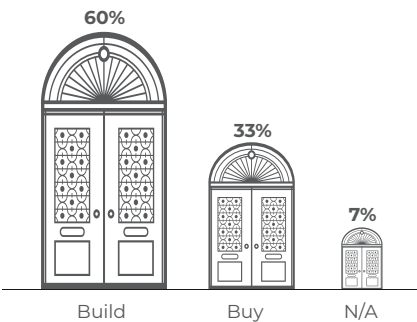
Which positioning of hotels are you more likely to invest in?



Which of the following are you more likely to invest in?



Would you prefer to build or buy your next hotel?

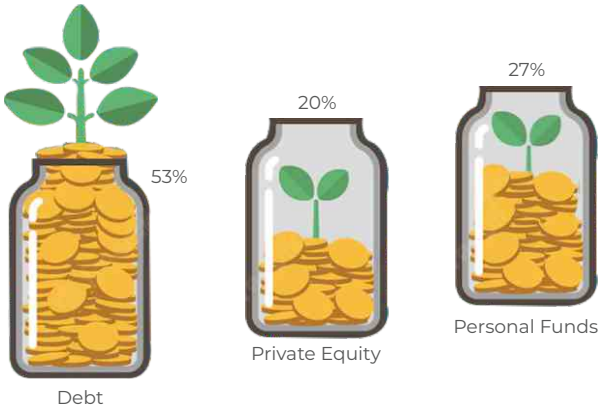


With 73% Owners open to investing further in the business, % of Owners willing to buy an asset has dropped to 33% (similar to 2013).

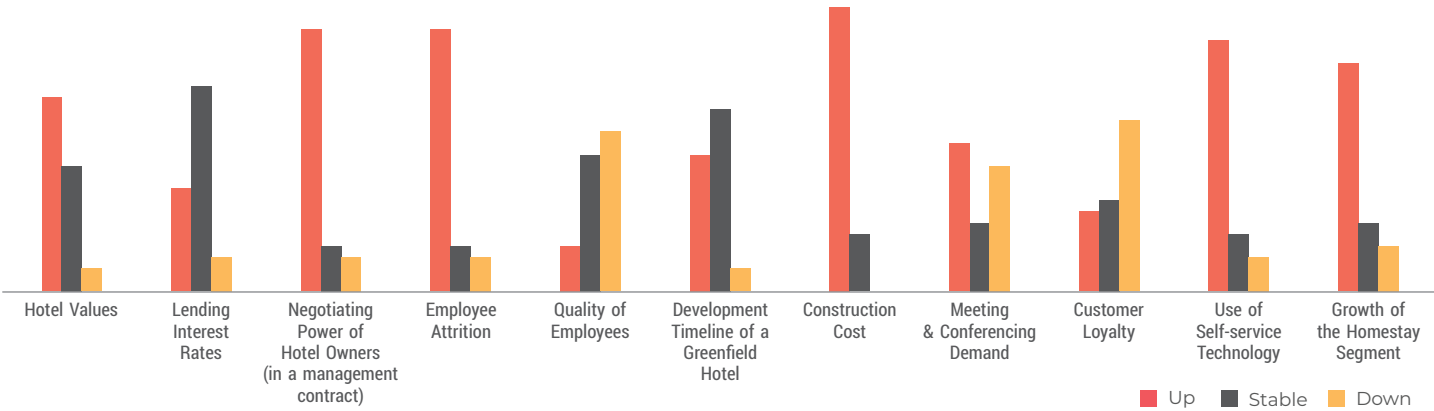
Owners looking to build assets is up at 60%.

Post-pandemic, Debt is the preferred type of funding for more than 50% of the Owners.

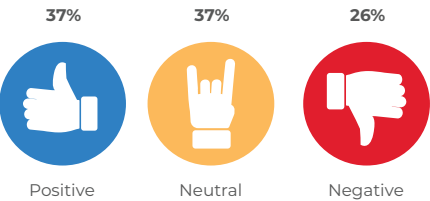
What is your preferred source of primary funding for hotel assets?



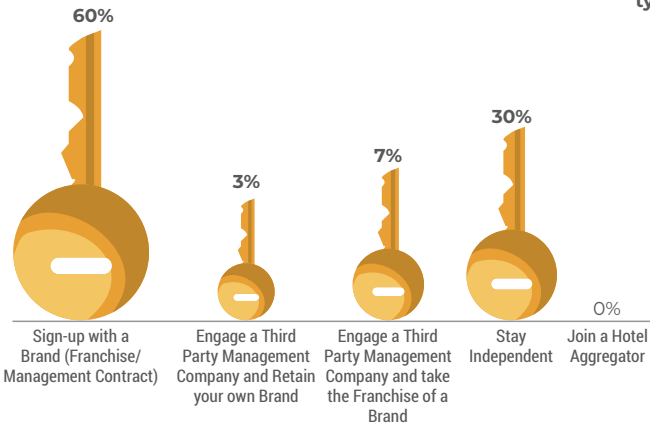
Over the next two years, how do you see the following changing?



What is your view on the current lending environment in India?



For your next hotel, which of these would you prefer?

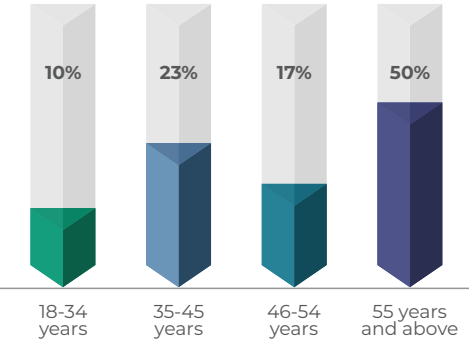


To expand your hotel portfolio, which type of location are you focussed on?

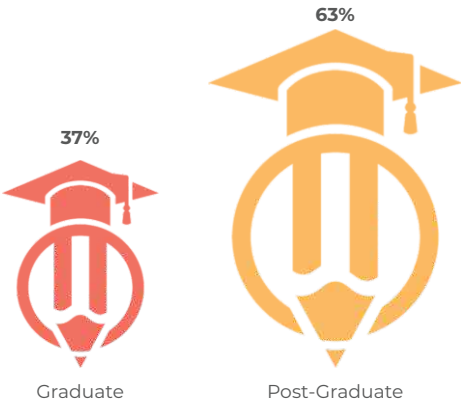


PERSONAL PROFILE

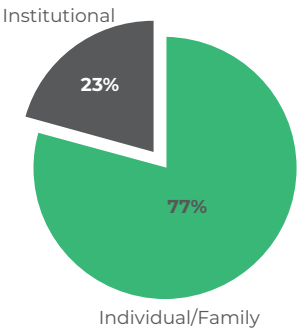
Age (in years)



What is your highest level of education?

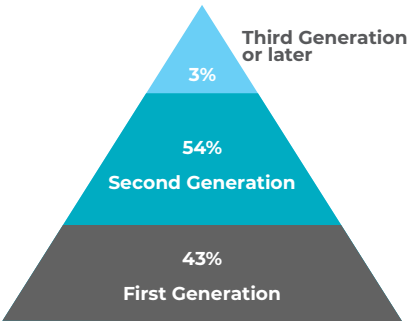
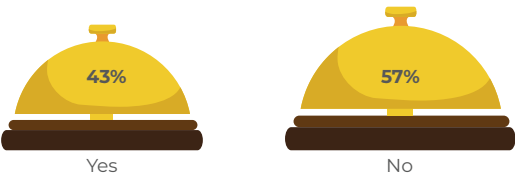


What kind of owner are you?

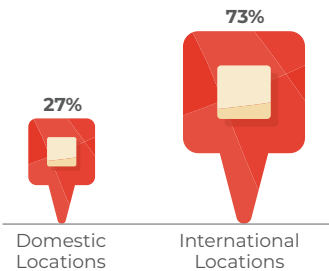


Which generation of hotel owner are you?

Do you have any formal education in the hospitality sector?



Where do you prefer vacationing?



OUR SERVICES



Asset Management

Unlocking the true potential of a hotel asset



Executive Search

A holistic approach to talent acquisition



Energy Asset Management

IoT-based energy efficiency asset management solution



Project Execution & Planning

Strategic guidance and leadership throughout the initial development stages of a hotel project



Operator Search

Management and Franchise Contract Negotiations



Strategic Advisory

Trusted hospitality advisors for achieving optimal economic returns for your hospitality ventures



Transaction Advisory

Innovative solutions for deal identification and structuring



Hotelivate is a new-age hospitality consulting firm offering specialized services to clients across the Asia Pacific region. Hotelivate offers a comprehensive consulting environment through a diverse team of consultants that have a combined professional experience of 250 years across varied hospitality verticals. The firm presently has offices in Delhi, Mumbai, Singapore, Jakarta and Dubai.

CONFERENCES & EVENTS



www.hotelivate.com