

HOSPITALITY Talk

**Will India
see Kempinski
again?**

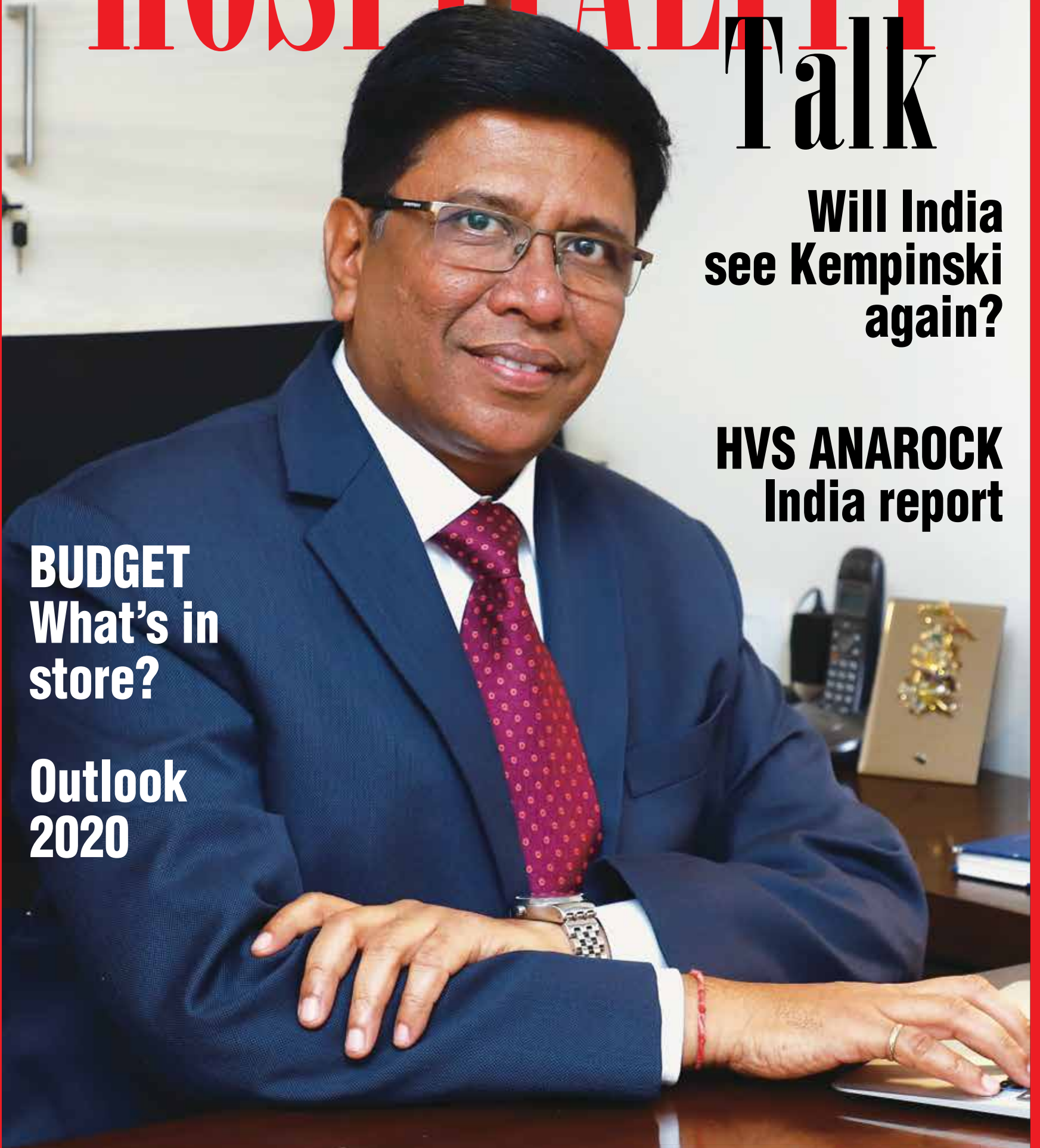
**HVS ANAROCK
India report**

**BUDGET
What's in
store?**

**Outlook
2020**

BEST WESTERN

Success story





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**HANDICRAFTS
INDIA
YEAR BOOK**

New Delhi: 72, Todarmal Road, New Delhi - 110 001
Phone No: +91 11 232 34177,
Fax: +91-22-22070131
E-mail: hospitalitytalk@ddppl.com

Mumbai: 504 Marine Chambers,
43 New Marine Lines
Mumbai 400 020, India
Tel: +91-22-22070129, 22070130
E-mail: mumbai@ddppl.com

UAE: P.O. Box 9348, Sharjah, UAE
Tel: +971 6 5528954, Fax: +971 6 5528956
E-mail: uae@ddppl.com

Editor & Publisher
Sanjeet

Managing Editor
Peden Doma Bhutta

Associate Editor
kanchan.nath@ddppl.com

Senior Correspondent
anupriya.bishnoi@ddppl.com

Advertising : Delhi
irwin.kainth@ddppl.com
+91-9999989190
gaganpreet@ddppl.com
+9-19650399934

Advertising : Mumbai
harshal@ddppl.com
susan.eapen@ddppl.com
priyanshu@ddppl.com

Advertising : South
shraddha.kapoor@ddppl.com

Design
Raashi Ajmani Girdhar

Advertisement Designer
Vikas Mandotia
Nitin Kumar

eCommerce
Ashish Chakraborty

Production Manager
Anil Kharbanda

Circulation Manager
Tarun Jain

Business Manager
Ashok Rana

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Editorial enquiries: (concerning reproduction of articles):
talk@ddppl.com

Advertising enquiries: nikhil.jeet@ddppl.com

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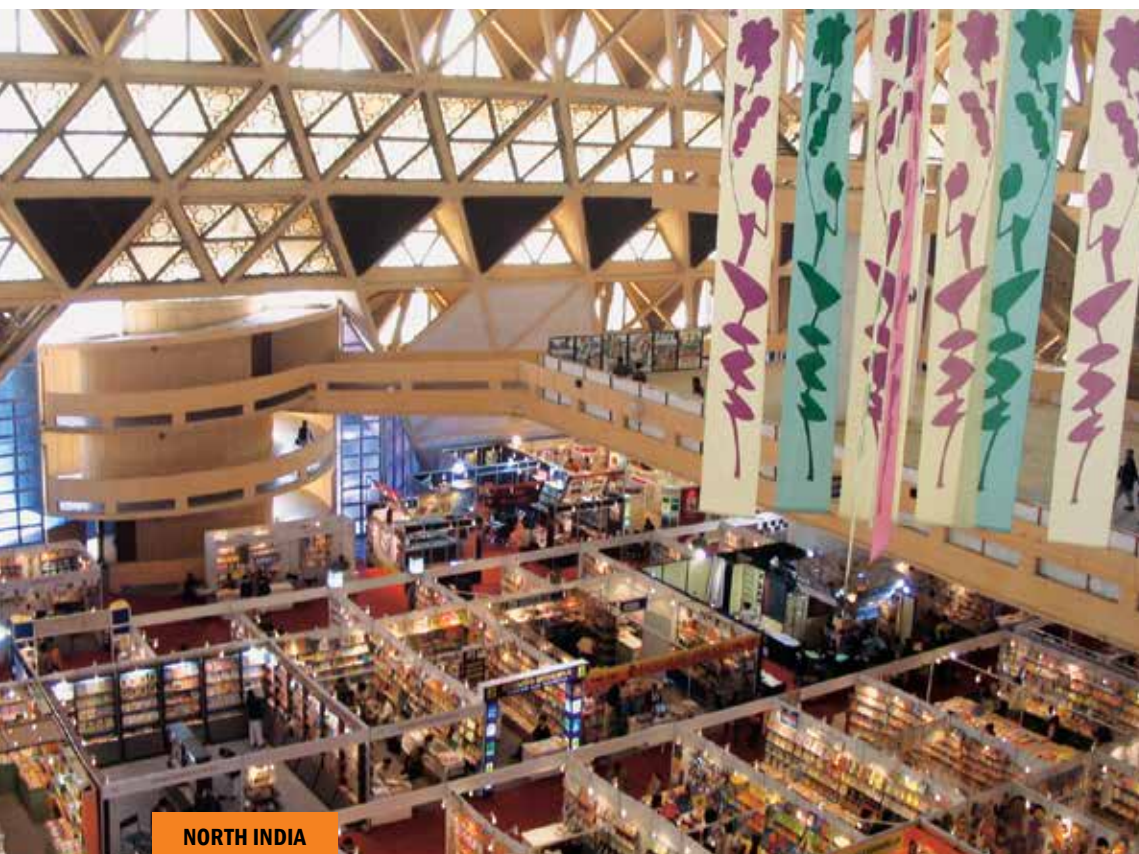
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PAN INDIA

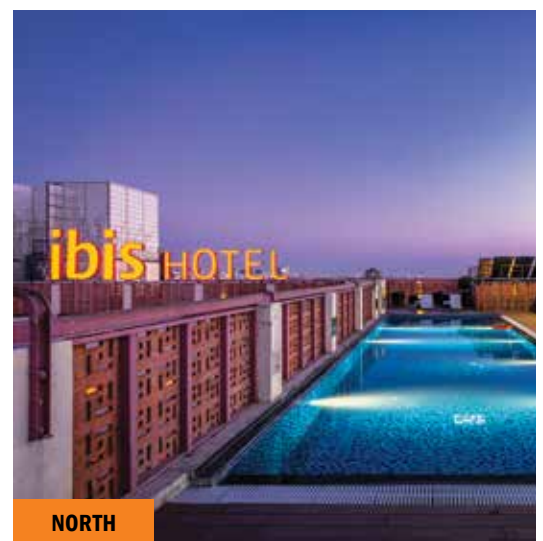
Prestige to add 1000 rooms in India by 2025 across 4 Marriott brands

Marriott International and Prestige Group will open six new hotels in India across W, JW Marriott, Tribute Portfolio and Moxy brands across South India.


NORTH INDIA

ITDC to develop 5-star hotel at Pragati Maidan for ₹611 crore on 99-year lease

The government has approved transfer of 3.7 acres of land at Pragati Maidan on a 99-year lease for ₹611 crore to set up a five-star hotel. Giving details, **Prakash Javadekar**, Minister of Information and Broadcasting, said, India Trade Promotion Organisation, which manages Pragati Maidan, will undertake a mega project to redevelop the land into a world-class International Exhibition and Convention Centre (IECC). The implementation of IECC project is in full swing and scheduled to be completed in the year 2020-21.


NORTH
ibis Jaipur Civil Lines

refurbishes, 22 rooms, restaurants and interiors

ibis Jaipur Civil Lines has refurbished its interiors,

dining and 22 new premium

rooms for the new-age

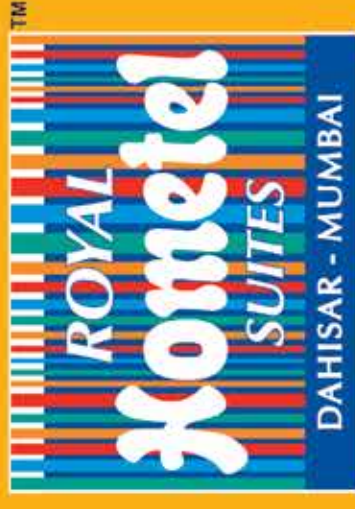
traveller in line with the

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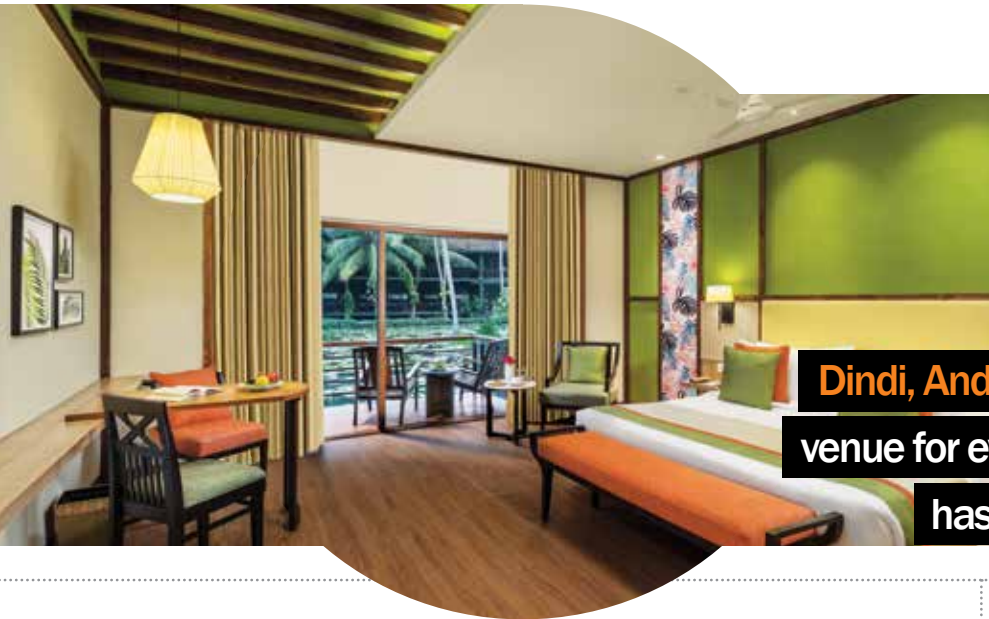
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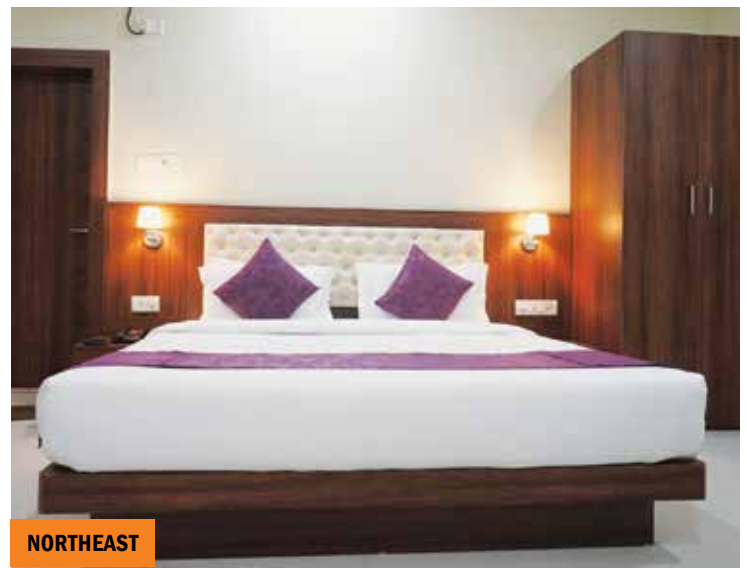


SOUTH

Sarovar Hotels & Resorts opens new hotel in Dindi, Andhra Pradesh, with 50 rooms. The hotel offers a venue for events of all sort, for up to 150 guests. The hotel has a fitness centre & gives complimentary Wi-Fi.

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room WelcomHeritage Inderpura Resort opens in Rajasthan. WelcomHeritage has opened a new property, situated on Delhi road state highway 37B at Udaipurwati of Jhunjhunu District in Rajasthan.



NORTHEAST

Lords Hotels & Resorts opens its first property in Northeast, Guwahati

Lords Hotels & Resorts has added a new property in Guwahati, Assam, named Lords Eco Inn, which will be launched under the 'Eco Inn' brand. The hotel will start operations after implementation of brand standards and refurbishment. It will feature well-appointed rooms, a multi-cuisine restaurant and a banquet hall. The property is at a distance of 22 km from Guwahati Railway Station and walking distance from Lokpriya Gopinath Bordoloi Airport.



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Taj Fateh Prakash Palace opens in Udaipur

Indian Hotels Company has announced the addition of Fateh Prakash Palace to its portfolio which is been renamed as Taj Fateh Prakash Palace which will have 65 rooms and suites. Fateh Prakash was built during the reign of Maharana Fateh Singh Mewar in the 19th century as an exclusive venue for royal functions.

**ACCOR
CHAIRMAN
& CEO****Sébastien Bazin**

Accor's third quarter performance was solid, validating the quality of its asset-light model in a mixed international environment. The group once again generated solid revenue growth with steady supply growth and a record-setting pipeline. At the same time, Accor continued to execute its strategy, making progress on the sale of its remaining real estate activities, and on the launch of ALL, the group's new distribution platform and loyalty programme.

**MARRIOTT
INTERNATIONAL****PRESIDENT
& CEO****Arne M. Sorenson**

In Q3, our worldwide comparable systemwide constant dollar RevPAR increased 1.5 percent, consistent with our guidance, while our global RevPAR index rose 210 basis points. Our sales organization is hitting its stride. For comparable hotels in North America, group revenue booked in the third quarter for all future periods increased 6 percent and, today, group revenue pace for 2020 is up at a mid-single digit growth rate.

**INTER
CONTINENTAL
HOTELS GROUP****CEO****Keith Barr**

Our strategic focus on driving net rooms growth enabled us to deliver a 4.7% increase in net system size despite a strong comparable. This will accelerate in the coming quarter and we are on track to deliver industry leading net system growth over the medium term. Third quarter Group RevPAR was down by 0.8 percent, impacted by tougher trading conditions in the US and China, and ongoing unrest in the Hong Kong SAR.

**Q3 Results are out!**

The hospitality industry's performance varies with each quarter. While some do phenomenally well, some don't match with the brand's expectations. Below are excerpts from how brands have performed globally in the third quarter of 2019...

**WYNDHAM
HOTELS & RESORTS****PRESIDENT & CEO****Geoffrey A. Ballotti**

Our team's sharp execution against our strategic and operating plans allowed us to deliver solid results in Q3, despite a softening RevPAR environment, highlighted by continued expansion of our system size and significant growth in adjusted EBITDA. We increased our share repurchase authorisation to reflect our strong free cash flow and our sustained focus on returning cash to shareholders.

**HILTON
PRESIDENT
& CEO****Christopher J. Nassetta**

Despite the overall slowing macro environment, we have delivered strong bottom-line results for Q3. Adjusted EBITDA was towards the high end of guidance and diluted EPS, adjusted for special items, exceeded our expectations, driven by strong net unit growth. Additionally, we continue to achieve market share gains across all brands and regions year to date.

**HYATT HOTELS
CORPORATION****PRESIDENT
& CEO****Mark S. Hoplamazian**

Our management and franchise fee growth of nearly 11% this quarter is driven by roughly 13% year-over-year net rooms growth. Further, we have successfully increased productivity and operating efficiency for 23 straight quarters which has allowed us to maintain strong hotel operating margins even in the face of flat RevPAR growth this quarter.





The 'BEST' IS HERE

Best Western Hotels & Resorts is sensitive to the needs of the owners in addition to being competitive and performance focused. The brand has been growing exponentially, especially in the Indian subcontinent. **Atul Jain**, COO, (India, Bangladesh & Sri Lanka) shares the brand's plans.



Anupriya Bishnoi

Tell us a little about Best Western Hotels & Resorts and its evolution over the years.

Founded in 1946, Best Western Hotels & Resorts has since developed and evolved into the only hotel membership-based model in the world, currently comprising the hotel owners in North America. That is the reason the brand is quite sensitive to the needs of the owners in addition to being competitive and performance focused. Starting with the flagship 'Best Western', the brand portfolio grew to seven brands by the end of 2014. Beginning 2015, it underwent a brand refresh to broaden the appeal with a contemporary and energetic look, and to distinguish each of its brands and their exceptional offerings by creating more white space between them. Since then, more brands have been added to the portfolio as a response to the evolving trends

and business needs of the promoters. Earlier this year, three more brands were added in the brand portfolio with the acquisition of WorldHotels. Today, it has 16 brands and over 4,500 hotels in more than 100 countries.

Can you talk about your expansion plans - India, to be specific?

We all know that India has a different kind of hotel market than any other country, and in some ways, it has similar challenges faced by the other developing nations such as China where the hotel industry is still in its formative stages, and doesn't have the kind of saturation that you find in more mature markets. With the market share of the non-branded hotels exceeding that of the branded hotels, particularly in the midscale segment, there is a lot of opportunity for growth in India since people have become more brand-conscious and are ready to pay for superior quality and experience. Thus, having a good team in place to manage the hotels is crucial for protecting the reputation of the hotel and the brand as well. Best Western is already one of the most popular international hotel brands in India, and apart from reinforcing its presence, we're also focussed on opening hotels with other brands in the portfolio to show that we have much more to offer. We have been experiencing a remarkable growth and penetration into diverse markets in India in the past three years, and we hope to gather more pace with the opening of ten more hotels in the next six months that will take our tally to 2,000 operating keys. This would be followed by the opening of over 1,000 keys in the pipeline. The new hotels shall operate under



New hotels will operate under Best Western, Best Western Plus, SureStay Plus and SureStay Hotel brand across India"

Best Western, Best Western Plus, SureStay Plus and SureStay Hotel by Best Western brands in locations across India. Apart from the new-build hotels, we're equally focussed on conversion hotels to aid rapid expansion, and we have suitable brands to offer for an easy conversion.

How would you define the success of Best Western Hotels & Resorts in India?

'Your success is our success' is the mantra we follow in our company. It is a two-way process involving collaborative efforts of all the stakeholders and the elements that make everyone proud of being a part of the Best Western family. For us in India, success lies in quality rather than quantity, and the emotional investment. Our brand is dependent on the experiences of our guests staying at the hotel. This brand image is really in their minds; not what our marketing message says or what our salesperson maintains. It is through those experiences that we can build a strong brand. The second one is emotional investment for the brand, whether it is by having a strong operational team or sales and marketing activities. These are the things that make a company successful and well regarded. But you also got to have quality in these elements. As I mentioned earlier, if you don't have quality, it can't grow successfully. Therefore, through our management services and with an experienced team, we think we have a much better chance of succeeding in the long run.

What brands do you have in your portfolio currently?

Best Western, Best Western Plus, and Best Western Premier have been the mainstay brands for a long time, corresponding to the midscale, upper midscale, and upscale segments, respectively. SureStay and SureStay Plus by Best Western are the lower midscale and midscale brands for smaller room inventories and are primarily for conversion properties. Vib and Glo brands are upper midscale and midscale boutique brands. While Vib is for primary locations and aimed at tech-savvy, contemporary travellers, Glo is for the secondary market. Executive Residency is an upper midscale brand catering to the extended stay segment for both the business and leisure travellers. Then, there is a bouquet of soft brands comprising SureStay Collection, Best Western Signature Collection, and Best Western Premier Collection, ranging from midscale to luxury segments for quality hotels having a significant brand presence of their own, providing the owners with the advantage of the strong reservation and distribution systems and the quality programme of the brand at the back end. In 2018, two more brands were launched, namely Aiden and Sadie, which are high-end boutique lifestyle brands belonging to the upper midscale and upscale positionings.

The hospitality landscape is getting overcrowded. How are you geared to deal with these changing business dynamics?

You are right. There has been a tremendous growth in the number of brands in the market, both international and domestic, which is good for the promoters in terms of the wide range of choices that they have and puts



“
Technology
has played an
important role in the
transformation of the
hospitality industry
over the last decade
and a half”

them at an advantageous position for negotiating the terms. Further, every hotel chain has multiple brands and new brands keep getting added to the portfolio every year. Here, I would like to say that for a brand to be successful, it needs to have a well-defined selling proposition; about what the brand stands for. So, if you look at all our brands, they are clearly defined in terms of their positioning, development guidelines, and guest facilities and services, aimed at providing a distinct experience to the guests. Every hotel brand has its own space in the market. While the dynamics of the business will naturally keep changing, I firmly believe that continually improving the quality of guest service and comfort and maintaining a healthy relationship with the promoter are the constant that'll help us keep and expand our footprint in the future.


What about the growing influence that OTAs have on the hospitality business?

Well, at the outset, we must accept the fact that the OTAs are here to stay and exist as a considerable business channel. Hence, in my view, we must work with them at the terms suitable to us, and I think there are certain ways to coexist. Firstly, the brand has to think about not allowing them to cannibalise their business, which means your website, mobile app, and electronic distribution needs to be really strong.



THE GLOBAL FOOTPRINT

Best Western Hotels & Resorts, headquartered in Phoenix, Arizona, is a privately held hotel brand with a global network of 4,500+ hotels in nearly 100+ countries and territories worldwide. Recently acquired by Best Western Hotels & Resorts, the WorldHotels Collection boasts three unique brands: Luxury, Elite and Distinctive. The collection includes establishments across the upscale, upper upscale and luxury segments that are iconic in nature.




we lowered the requirements needed to book a hotel room for free through our programme. Secondly, it is about earning opportunity. Hence, we do a lot of promotions that give guests bonus points, so that they can rack up their points faster to redeem them. On the redemption side, we have partnered with many brands, like Shoppers Stop, Amazon, etc. so that our customers do not just get free room nights, but also gift cards. We have also worked on the back-end recognition system and upgraded our property management system (PMS). It tells our associates if the guest checking in is a diamond or a platinum guest and we accordingly give them a goodie-bag to appreciate their loyalty towards our brand. Right now, the loyalty programme contribution is about 40 per cent globally and in India we are getting there. The programme has different maturity in various parts of the world. In North America, we have had it for the longest time, and that is why we have been more successful. However, in India, China, South America, Europe, etc., we are in the process of ramping it up quickly.

What's your take on technology? What role does technology play in improving guests' experience?

Technology has played an important role in the transformation of the hospitality industry over the last decade and a half. It has helped in reducing costs, enhance operational efficiency, and improve services and customer experience. Both customers and businesses can benefit from improved communication, reservations, and guest service systems. Investing in internet, technology and innovations will allow hotel operators to stand out from the competition, fulfill every guest's expectations, and attract new customers. Online bookings, automated check in and check outs, keyless entry, etc. are few of the technological examples impacting hotel guest experience.



We must accept the fact that the OTAs are here to stay and exist as a considerable business channel"



Secondly, your loyalty programme is the best defence against OTAs because they don't have it. In our case, we have an award-winning website, mobile app, and loyalty programme that keep us in a pretty good shape to defend against the OTAs. Thirdly, there has to be a focus on the quality of experience you give to the guests at your hotel. Ultimately, what is the one thing a hotel has that the OTAs don't? It is the ability to interact with the customers. OTAs can send business to the hotel, but they have no way of interacting with our customers. Therefore, we educate the hotels to provide the superior experience because that is what is going to make people come back. Lastly, we need to work out the most advantageous commercial terms with the OTAs. It is not just in terms of negotiating lower commissions, but also in aspects like last room availability and the ability to sell number rates through the loyalty programme, etc. that will ensure our brand search terms are protected.

How are you leveraging Best Western's loyalty programme, 'Best Western Rewards' to attract and retain customers?

A lot of people make loyalty programmes more complex than necessary. Hoteliers need to understand what the rewarding part about these programmes for guests is. The first should be the ease of redemption, so














Do you see AirBnBs of the world as a threat or an ally?

Well, first, I think if you look at Airbnb, it's a platform that capitalises on a sharing economy. There are different hosts that use this platform. There are people that might just want to rent out their spare bedroom every now and then, that's the sharing economy, and it's not what the hotel industry is concerned about. We are more concerned about the commercial operators that are operating full-time. They basically buy apartment buildings and rent them out as hotels. That's the one thing that we are more concerned about.

I want to emphasise that we have nothing against a sharing economy, nothing really against Airbnb. It's the commercial operators that leverage a platform to circumvent all the health and safety protections or the accessibility that the consumers should have. However, Airbnb is taking up a huge share of supply in major markets, which puts pressure on occupancy. When hotels partner with OTAs it's a channel shift, that is, you switch from a brand channel to a more expensive OTA channel that you pay a commission on. With Airbnb, it's a share shift. You lose the business; you no longer have the business. It is a threat that cannot be underestimated.

Best Western at a glance!

It's only heartening to know that hotel brands have been expanding and diversifying to create sub-brands. Hospitality Talk simplifies Best Western's offerings, explaining the brand ethos and individuality of each.

| | | |
|---|---|--|
|  <p>BW Premier Collection luxury</p> <p>is most exclusive collection of carefully-curated hotels, providing an authentic boutique experience.</p> |  <p>BW Signature Collection upper midscale</p> <p>Enticing guests with a unique hotel experience marked by a home-away-from-home comfort and value, this brand is a collection of affordable hotels.</p> |  <p>Best Western midscale</p> <p>is a Best Western Hotels & Resorts' legacy brand that offers everything you need to travel well - a warm welcome, a rewarding stay and a truly exceptional value.</p> |
|  <p>Best Western Premier upscale</p> <p>is an exclusive offering designed for worldwide travellers seeking superior accommodations, exceptional service and first-rate amenities.</p> |  <p>Executive Residency upper midscale</p> <p>With its stylish comforts, the brand is designed to make long-term stay a pleasure. It comes with ample kitchenette with cooktop, sink.</p> |  <p>Glo by Best Western midscale</p> <p>is a boutique hotel, exuding expressive designs and is value focused, allowing you to easily earn and redeem loyalty points .</p> |
|  <p>Vib Best Western upscale</p> <p>exudes modern amenities that blends technology with familiar conveniences for an extraordinarily refreshing experience for the guests.</p> |  <p>Best Western Plus upper midscale</p> <p>delivers the comfort and convenience one expects from the brand. The spacious guest rooms offer plush bedding and stylish bath amenities.</p> |  <p>SureStay Plus Hotels midscale</p> <p>Whether for leisure or business, this brand is the perfect choice for those who like to travel simply and casually.</p> |
|  <p>Sadie Best Western upscale design</p> <p>is an alluring ambience with bold designs and meticulously curated detail. It defies the status quo for upscale accommodations.</p> |  <p>Aiden upper midscale design</p> <p>is a trendy new collection of modern, suburban boutique hotels. It embodies the eclectic spirit of the neighbourhood – a welcoming host of local flair and new adventures.</p> |  <p>SureStay Collection midscale</p> <p>A unique blend of hotels, this brand by BW appreciates the intricate details that add to a better stay experience.</p> |
| | |  <p>SureStay Hotel lower midscale</p> <p>welcomes those who like to travel simply and casually. This brand offers necessities for a good night's stay.</p> |

Raise a glass @ Mövenpick Hotel Colombo

George Koumendakos, General Manager, Mövenpick Hotel Colombo, shares what makes his property special.

What's the USP of your property?

One of our key USP's here at the Mövenpick Hotel Colombo is the Vistas Rooftop Bar. It's located 24 storey high and is one of the highest rooftop bars in the city together with the infinity sky pool. The guests can sip through some unique cocktails that we have on offer, our 'signature Mövenpick inspired cocktails' like the Achcharu cocktail and Gal Pol, to name a few. Another feature that makes us stand out are the spacious rooms. We have some of the largest rooms in the city with both ocean and city facing. Our expertise also lies in our exemplary F&B, the AYU buffet and the Mövenpick breakfast buffet being the key highlights for any of our guests.

What kind of traffic do you get from the Indian market?

The Indian market is one of our strong segments with over 20 per cent of the business coming in. It's a mix of both corporate and leisure. Also, our key markets include China, India, Europe and the Middle East with regards to both business and leisure travellers.



20% of our business comes from the India market"

How are you dealing with the competition?

We are modern, fun and provide project vertical theatrical experience from the ground floor to the rooftop. Our rooms and Food & Beverage services can be considered one of our key highlights. Even our meetings and event spaces have unique offerings, they cater to intimate weddings. The main ballroom comes with break out rooms, located on the same floor. Therefore, we highlight our USPs when it comes to standing out.



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The road ahead

India has witnessed rapid economic growth in the past few years with a GDP growth averaging over 7.5 per cent for the period 2014-2018, facilitated by a host of economic and policy reforms by Government of India. While in general, these reforms have

benefitted the Indian travel and tourism sector, which is among the fastest growing group globally, setting up a hospitality business in India and achieving reasonable scale as compared to developed economies is still a difficult task at hand.

CHALLENGES IN LAND ACQUISITION

- Complex process for acquisition of suitable land with clear title and required land use permissions
- Government-approved land parcels are far and few in key urban locations
- Conversion of permitted land usage from agricultural to commercial purposes, a long-drawn process
- Inhibition of banks from funding any land purchases, as per RBI regulations

Notwithstanding the above, the cost of land in key urban areas is very high, which makes land cost range at an average between 30-40 per cent of total project cost. Moreover, with RBI regulations inhibiting banks from funding any land purchases, all capital required for buying land must come in the form of equity, making the project ROI lower than most global investors' expectation for their invested capital.

COMPLEX REGULATORY REQUIREMENTS

- Multiple sanctions and licences to be obtained to construct the building
- Additional licences needed prior to opening and operating the hotel

The hospitality sector is regulated by both the central and state governments, which makes the approval process complex. Multiple sanctions and licences, including sanctioned building plans, environmental sanctions, airport building height clearances, and construction labour permits among several other construction-related sanctions, are needed. The average time required to obtain these clearances ranges between 12 to 18 months, adding to the time required to complete a Greenfield project.



Lead...

A recent report by HVS, titled ‘Ease of Doing Business: Indian Hospitality Sector’, highlights some key challenges that inhibit the entry of fresh capital in the business, while also delving on immediate reforms needed to bring it on a par with international standards.

COST OF CAPITAL

- High cost of servicing debt
- Quantum of debt available averages only 50 per cent of project cost
- Short tenure for repayment of debt

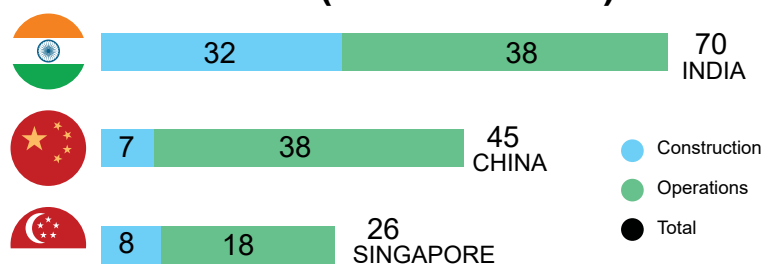
India ranks amongst the countries with the highest cost of capital for the hospitality industry. Lending norms for the industry are extremely stringent with interest rates between 11 and 14 per cent for borrowings as against an average of 4-5 per cent in most developed economies. The quantum of debt available to the sector averages at 50 per cent of the total project cost, further restricting the capital available for hotel development. And finally, the short tenure for repayment of debt which averages around 10-12 years, including the construction period moratorium. Given the cyclical nature of the business, if the hotel enters the market in a down cycle phase, it is almost certain to head towards becoming an NPA as has been evident from the last cyclical downturn.

CHALLENGES RUN FAR AND BEYOND

Once the hotel is operational, it still needs to get most of the licences renewed on an annual basis.

- Licences needed to operate a hotel in India are far too many and vary across states
- Not possible to apply for multiple licences simultaneously, and parallel applications cannot be pursued across authorities
- Lack of clarity on licences needed or process to be followed
- Absence of a single point where information can be accessed by a potential investor
- Absence of a nodal agency authorised to monitor and assist hospitality-related investments


INDICATIVE NUMBER OF LICENCES & APPROVALS NEEDED TO OPEN & OPERATE A HOTEL (COUNTRY-WISE)



Source: HVS Research

HVS ANAROCK's lowdown on 2019 & forecast for 2020

Like every year, 2019 started on an optimistic note, but was that optimism well placed? Have the predictions of steady growth made their investors happy? **Mandeep S. Lamba**, President (South Asia), HVS ANAROCK explains the scenario.

 Anupriya Bishnoi

How has 2019 been for Indian hospitality industry?

At the start of 2019, we were optimistic about the sector because of the strong performance witnessed in 2018 driven primarily by the increasing demand-supply gap. The first quarter of 2019 beat market expectations, and in the latter part of the year, the sector benefitted from easing of Goods & Services Tax (GST) rate on hotel room tariffs across the board. However, successive negative influences overshadowed the positivity in the sector.

The closure of Jet Airways resulted in a severe crunch in availability of airline seats, which combined with the impact of general elections in the country led to a temporary softening in demand growth. While multiple airlines quickly filled the void by increasing capacity, and the incumbent government returned to power with an impressive majority, the ongoing economic headwind resulted in Q2 & Q3 being negatively impacted and dampening the great start to the year. The closing months of the year have once again brought some cheer with November proving to be an absolute block buster for the industry with several performance records being broken. Overall the year will see a much slower growth than was anticipated and we are likely to close at a RevPar growth of circa 5 per cent on a pan India basis.

Leela Palaces Hotels & Resorts



Your previous report has predicted- 'Supply is anticipated to grow by 4 per cent and demand by 7 per cent. Has that been achieved?

Supply has grown as anticipated in 2019. Demand growth had softened temporarily before picking up towards the latter part of the year.

Which are the cities that have performed the best in terms of occupancy and ARR? Which cities have witnessed a decline?

Most of the major cities have witnessed a growth in RevPAR, with Hyderabad recording the highest y-o-y growth as of year-to-date period ending October 2019, followed by Bengaluru and Gurgaon. In contrast Ahmedabad, Goa and Pune registered a decline in RevPAR during the same period. Mumbai continued to lead in terms of both occupancy and ARR for the same period and is the top performing market for 2019 followed by Delhi for the first ten months of 2019.

Also, does the prediction of '2020 being the year of highest occupancy' still remain the same?

The industry is expected to perform at similar levels of growth witnessed in 2019, with ARR contributing more than occupancy. 2020 is not expected to be the year it was anticipated to be with the prevailing economic and political environment in the country.

What are your predictions for 2020?

Due to the ongoing economic headwinds, we anticipate the sector to perform at similar levels of growth as witnessed in 2019. The ongoing reform plan of the Government of India may help revive the economy in the second half of 2020.

According to you what remained challenging for the industry this year?

The closure of Jet Airways resulted in a severe crunch in availability of airline seats. This coupled with the impact of general elections and the global economic headwinds led to a temporary softening in demand growth.

By when should we be able to meet the gap between demand and supply in the Indian hotel industry?

Hotel supply growth in India has been successively declining since 2012, with the current year being an exception to the long-term trend. Based on the projects currently under construction and in the pipeline combined with the ongoing economic uncertainty, HVS anticipates that the long-term trend of declining supply growth will continue to remain well into the first half of the next decade.

DID YOU KNOW?

In 2018, ANAROCK Property Consultants partnered with HVS as a new business vertical. HVS ANAROCK focuses on brokerage feasibility studies, operator searches, appraisals, executive search and other hospitality sector consulting and advisory services throughout South Asia.



Due to the ongoing economic headwinds, we anticipate the sector to perform at similar levels of growth as in 2019"



Turn of the decade

2019 has been an interesting year for the industry. While there were a few hiccups, the industry did combat them efficiently and swiftly. We speak to industry stalwarts to know their outlook for 2020 and the lessons learnt in 2019.

 Kanchan Nath

J.B. SINGH
President & CEO
InterGlobe Hotels

OUTLOOK 2020

We enter 2020 with enthusiasm and hope. We expect the operating performance to generally improve as the fundamentals of the industry remain strong with a slowing supply graph and an improving demand curve which has historically been in the 8-10 per cent range.



We have 6 hotels with a total of 1000 rooms under active development and are currently pursuing some very promising fresh deals in Pune, Goa, Mumbai, Hyderabad and Bengaluru.

On the policy front we have been in dialogue with the government and the Ministry of Tourism on several aspects of the industry, especially around the GST levied on civil structure (which does not allow for input credit) and parking norms (which are very onerous across the country).

SENTIMENTS 2019

2019 for us started with the opening of Ibis Kolkata, the 19th Ibis hotel in the country with a total count of 189 operational rooms. This was a much-anticipated addition in our portfolio because it was the roll out of our new generation design which has completely refreshed the look of both our public areas and our rooms. Our rooms now boast of a large panoramic window (to let in ample sunlight), a sofa instead of a long work table so that the guest has a place to sit while working or for entertaining guests, a tactile finish wardrobe with a space within it for tea/coffee maker and large wall unit for our television (32" instead of 28" earlier).

Now our rooms are practically paint free with all walls having wall papers giving it a cleaner and more agile finish. The accent wall in particular has 7 different wallpaper designs throughout the hotel (giving each room a different feel) and is reflective of things which are unique to the city of joy from fishes to hand pulled rickshaws. Our public areas are very trendy with cozy corners and chic and young designs. Key elements of the city have also found its way into these areas in the form of artwork and décor. The same design elements have also merged into our façade which for the first time has been painted in vibrant bold colours that stand out. Operational performance in the first quarter of the year was also very heartening and we grew over 10 per cent y-o-y. With the general elections looming we had anticipated a weak 2nd quarter but with the Jet Airways closure and general slowdown of the economy the performance of our operating properties remained muted and flat until October this year and November was a strong month. December performed better than the last year.

“ We have been in dialogue with the government and on several aspects of the industry”

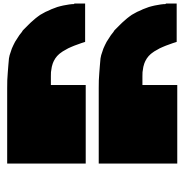


ROOP PRATAP CHOUDHARY

Managing Director
Noor Mahal

2020 OUTLOOK

2020 is going to be a turning point in our expansion story. The group has aggressive expansion plans, we aim to expand in other parts of the country and prominent foreign destinations in the next couple of years. We aim to become the royal abode and an ideal getaway option for every millennial traveller of the world. 2020 is expected to be a brilliant year for the hospitality industry.



We aim to expand the brand's footprint in other parts of the country and foreign destinations”

SENTIMENTS 2019

2019 has been a great year for the brand, we have had excellent occupancy rate round the year and the guest satisfaction has yet again stayed at 97 per cent. Also, towards the end of the year, we expanded our existing hotel. We added three more royal convention as well as wedding spaces to Noor Mahal, which are already getting back to back bookings.

PRADIPTA MOHAPATRA

Asst. Vice President (Sales & Marketing)
MAYFAIR Hotels & Resorts

2020 OUTLOOK

Travel and tourism sector, in the face of importance attached to it at the policy level, is set to grow by leaps and bounds in the days to come. It will, invariably facilitate the expeditious growth of hospitality industry contingent upon the condition that the industry proactively aligns as well as diversifies its offering to suit the growing and changing requirements of the guests. As a brand we enjoy a distinct repute of offering nature-themed luxury and as a part of our upgradation and diversification drive, we are coming up with a Tea Resort in Siliguri which will be around 100-Key property set amidst hundreds of acres of plush greenery. The work for it is expeditiously underway and we look forward to opening it for guests in 2020. Other projects in the pipeline include a 252-key



five-star deluxe property in Kolkata- the work for which is also underway, and we plan to make it operational latest by early 2021. Further, we are also actively progressing in process of establishing a Golf Resort in Satapada region of Puri, Odisha wherein our group will be investing ₹125 crores. It will be a five-star deluxe property featuring facilities like helipads.

SENTIMENTS 2019

2019 commenced on a very positive growth note for our brand. Carrying forward the legacy of success driven by warm hospitality, personalised services, and authentic cuisines- all wrapped in the stunning beauty of nature, MAYFAIR made a grand entry in the central Indian hospitality landscape with a palatial 124- key property “MAYFAIR Lake Resort” at Raipur. A destination unto itself, the resort with state-of-the-art luxury facilities, soothing panoramic views of the pristine Jhanjh Lake, gratifying greenery & elegantly decorated event spaces’ ranging from 9,000 sq. ft. to 94,000 sq. ft. has been exquisitely designed as an ultimate MICE and destination wedding venue.



We have a 252-key five star deluxe property in the pipeline which will be operational by 2021”



NOSHIRA MARFATIA

Senior Vice President - Sales & Marketing
The Fern Hotels & Resorts

2020 OUTLOOK

With 72 hotels in 57 locations and 3500+ rooms, the brand captures domestic and international business and leisure guests looking for hotels in central locations offering the perfect blend of luxury and coexistence with nature. Our hotels cover metro cities, hills and beaches, jungle safaris, temple towns, and more. While the current economic downturn may continue well into 2020, our hotel price points are well-suited to both business and leisure travellers. The domestic market is growing as is the conference MICE market, especially with the pharmaceutical, banking and insurance sectors. Our strong travel trade relationships ensure we get a good share of the inbound leisure business to our resort and leisure locations. And we are also very strong in the OTA segment. This ensures we achieve strong occupancy levels across the group. With a stronger growing presence in resort and leisure destinations in 2020, we are looking forward to bringing the Fern brand of environmentally responsible hospitality to more and more guests.

SENTIMENTS 2019

In 2019, we have opened 18 new hotels in places like Aurangabad, Bhopal, Goa, Karad (Maharashtra), Kolhapur (Maharashtra), Lonavala, Manali, Morbi (Gujarat), Navi Mumbai, New Delhi, Polo Forest,



Sarnath, Satara (Maharashtra), Sawai Madhopur, Surat, Bharatpur (Nepal) and Kathmandu (Nepal). In January 2020, we will open another 4 new hotels in Bengaluru, Kevadiya (Narmada-Statue of Unity), Noida and Vijayapura (Bijapur), with another 8 hotels scheduled to open later in the year. In all, we have signed up 100+ hotels, currently operational and under various stages of construction.

“ We have signed 100-plus hotels, currently operational and under various stages of construction”

**PUSHPENDRA BANSAL**

COO
Lords Hotels and Resorts

OUTLOOK 2020

The hospitality industry in India is set to witness a better performance in 2020. As demand is outpacing the supply, there is a clear indication that hotel occupancy, ARR and RevPar will see an increase. Lords Hotels & Resorts eyes 40 hotels by 2020. The group will foray into new geographies including East and South. We have identified potential projects in the East where we have not made a mark yet and in South where we see tremendous growth in coming years. Lords Hotels & Resorts has recently added a new property in Guwahati, Assam. To be launched under the 'Eco Inn' branding, the property is expected to commence operations after



“ We have signed a few hotels in Lonavala, Vyara, Rajkot (three hotels), Lucknow and Udaipur”



implementation of brand standards and refurbishment. Guwahati is a gateway to seven sisters in North East and increasingly emerging as a commercial and tourism hub. We see immense potential for business and leisure tourism in Guwahati and are proud to introduce Lords Eco Inn in this region.

SENTIMENTS 2019

The year 2019 has been very favorable for the brand. We opened hotels in Birgunj – Nepal, Kurnool, Ahmedabad, Amritsar, Goa, Nathdwara, Morbi and Jamnagar. We also signed up few hotels in Lonavala, Vyara, Rajkot (three hotels), Lucknow and Udaipur. Also, the government's initiative in reduction of GST has increased room bookings mainly from FIT's across the Lords Group.

Budget 2020! What's in store?

A few industry stalwarts talk about their expectations from the budget this year. The travel and tourism industry is a vital contributor to the country's growth and foreign exchange. The hospitality industry provides a vital link to this chain.



Neha Rawat



GURBAXISH SINGH KOHLI

Vice President
FHRAI

The sector is at an inflection point after a decade of stunted growth. One of the major boosts to achieve this target is to grant an industry status to the sector on a national level and compensate states for any notional loss. The industry needs to be made eligible for tax incentives and concessions available to infrastructure industries under Section 80 I/A of the Income Tax Act, as savings from such tax can be ploughed back to build hotels. We would also recommend that the GST on hotels be further reduced to 12%.



PUSHENDRA BANSAL

Chief Operating Officer
Lords Hotels and Resorts

Government should strengthen its initiatives to create sustainable hospitality. They should also waive off tourist visa fee for a shorter period to increase inbound tourism. Another important aspect is the lack of adequate infrastructure. The focus should be on developing amenities like building good quality roads, constructing public restrooms on highways and petrol stations that makes road trip safe and women friendly.



SANJEEV K NAYAR

MIH, General Manager
WelcomHeritage

Government should continue with its tax reforms. Though the infrastructure has improved considerably, even now there is still scope of improvement. Since India has a large domestic market, road travel is gaining more momentum as the public at large are taking more vacations of lesser days, exploring the offbeat destinations in the region of their residence. There should be focus on National Skill Development Corporation to train our youth in hospitality and travel operations as there is shortage of skilled work force at the bottom of the pyramid.



NARESH ARORA

Founder & Chief Executive Officer
Trully India Hotels & Resorts

Further tax reduction in budget 2020 will be highly appreciated. Government has reduced the tax, which is a blessing for our industry, but there a lot of scope for further improvement. For example, if the slab of ₹7,500 can also come under the category of 12%, will bring a big respite to the industry. Hotel industry needs to be recognised and this starts right from here.



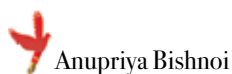
VIJAY JAISWAL

Senior Vice President- Sales and Marketing
Sarovar Hotels and Resorts

Travel and tourism industry is a vital contributor to the country's growth. Rising middle class and increasing disposable incomes has continued to support the growth of domestic and outbound tourism. A lot of hotel business expansion plan is focusing on many Tier-II and III destinations that can be developed into major destinations for domestic and international tourists but are currently lacking facilities. Better infrastructure like roads, railways, airports, waterways and sanitation, will lead to growth.

Cities that got booked in 2019

Vidhi Godiawala, Business Development Manager, Central & South Asia, STR, talks about how the country performed in 2019 and gave an insight on best-performing cities.



Anupriya Bishnoi



How did India perform last year?

India has faced a challenging 2019 due to job cuts in the automotive industry and IT sector. In general, the country suffered a major economic slowdown with its lowest GDP numbers. However, even in a challenging economic environment, hotel performance has been positive during the year with increases across the three key performance metrics.

Which are the top performing cities of India?

Mumbai and Delhi continue to be the cities with the strongest performance in India due to strong demand. In Delhi, demand has been especially strong due to diplomatic events, MICE business and weddings.

Through November, the market posted a 5 per cent increase in occupancy, a 4.3 per cent rise in ADR and a 9.4 per cent lift in RevPAR. Mumbai, on the other hand, has seen limited supply growth and strong demand in both the domestic and corporate segments.

Other markets such as Bengaluru and Chennai continue to perform positively as demand has been strong. Hotel performance in Goa, however, has been influenced by alternative accommodations and falling demand. As of November, occupancy (-5.4 per cent) and RevPAR (-4.3 per cent) each decreased in Goa.

How many properties are under construction in the country at the moment and by when will they all be open?

According to our latest AM:PM data from November, there were 379 hotels under construction in India. Over the years, we are seeing more investment with more international branded hotels coming into the market as well as growth in the presence of domestic chains.

2019: A strong past 12 months

India key destinations, YTD November 2019 RevPAR % Growth, INR



Source: STR

CHALLENGES

The main challenge India faced in 2019 was the economic slowdown in the country. Even though there was a slowdown in the economy, hotel performance has been positive in the market. Some markets, like Goa and Gujarat were affected by a general slowdown in economy and increased supply in those markets.


Map not to scale



Mumbai and Delhi continue to be the cities with the strongest performance in India due to strong demand”

Acc‘OR’ nothing!

Jean-Michel Cassé, Chief Operating Officer (COO) –India & South Asia, Accor, while chalking out his India plan, talks about how they are combating with industry challenges.

 Anupriya Bishnoi

Can you explain in detail about the expansion plans of Accor, specific to India?

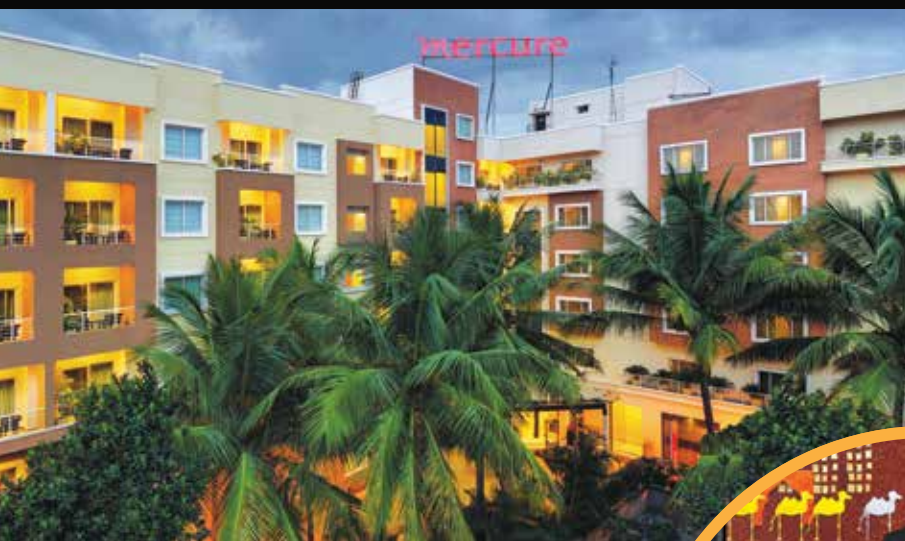
Densification in key markets is a significant strategy for Accor’s growth in India. We are entering and expanding in markets, based on their potential growth opportunities and favourable socio-macroeconomic factors. Over the next few years, our focus is to continue to grow our regional network and introduce new brands. We have 25 hotels and approximately 5,000 keys in the pipeline under active development. In line with Accor’s strategic growth pillars - development based on luxury hotels, private residences, lifestyle concepts and resorts, we are focussed on such opportunities in India, particularly in key commercial hotel markets and untapped leisure locations. Our upcoming properties for 2020 include the launch of Raffles Udaipur, Novotel Mumbai International Airport and ibis Mumbai LBS Road. We also have the Raffles Jaipur and Fairmont Mumbai Sahar, which are in the pipeline.

Which are the latest innovations in terms of facilities and services at Accor hotels worldwide?

We would like to take this opportunity to talk about ALL-Accor Live Limitless. It is a daily lifestyle companion that integrates rewards, services and experiences throughout Accor. With ALL, we are bringing value to everyday life whether guests and members live, work or play, elevating Accor’s relationship with clients, members and partners from transactional to emotional and inventing a completely new aspirational way to live limitless.

What are you doing to stay ahead of the competition?

What we are doing different from our competitors is that we at Accor are bringing augmented hospitality strategy to life. We are delivering the broadest range of brands and services in the industry into one platform to enhance



How did the brand perform in 2019 in the region?

At Accor, we have budgeted for a 12 per cent RevPAR growth for 2020 - like for like - which can be attributed to a greater contribution from increase in rates rather than on volume. For 2019, we witnessed good level of occupancies on weekdays and we were successful in this strategy for this year.



DID YOU KNOW?

Accor is the story of two friends, Paul Dubrulle and Gérard Pélisson, who opened the first Novotel in 1967 at a time when no one in France yet believed in this new hotel business model. Today, their dream of hospitality has become Accor. A wind of conquest still blows over the Group which brings together over 4,900 addresses in 110 countries.

and enrich the lives of our guests. We want ALL to become second nature to our customers - in their everyday lives and when travelling for business or with family. Life is enriched with ALL - Accor Live Limitless, the lifestyle platform that goes beyond hotels and promotions. We want to bring ever more value, so that our customers can enjoy ‘money can’t buy’ experiences across hotels, bars and restaurants, nightclubs, sporting events, entertainment, food festivals and more.



We will be bringing the much-awaited iconic Raffles brand to India in 2020”

Revamping and renovating hotels is also part of our strategy where we are making necessary changes in the hotel to enhance guest experience. We listen to the guest’s feedback and review our properties periodically to see if changes are required. In 2019, two properties were refurbished to make the overall experience better.



Novotel Ahmedabad recently rebranded itself as Novotel Ahmedabad – Hotel & Residence offering 222 rooms and suites (38 new rooms and suites), a premier lounge, and more meeting rooms with live kitchen facility. We also revamped our ibis Jaipur Civil Lines property to focus on family travellers to the city. The hotel underwent the refurbishment of its alfresco and lounge area as well as its 22 guest rooms offering more space for families travelling with young children. ibis Gurgaon Golf Course Road also underwent a renovation to mark its 10th year anniversary with soft refurbishment in all rooms, revamp of Spice It, vibrant lobby, setup of a new gym with improved equipment and much more.

Challenges faced last year?

The travel and tourism industry witnessed a few challenges in the initial months of 2019. Due to the shutdown of Jet Airways and grounding of Boeing Max aircraft, the industry had 30 per cent less seats. This increased the load on other aviation players and resulted in a situation where air traffic increased between 15 to 60 per cent in some cases. This range was alarming as it severely affected travel and tourism industry. When such crisis hits, the first cuts made in most of the companies are travel and meetings, hence affecting the hospitality industry. Also, due to elections and multiple dry days, hotel occupancy has slowed down. The industry also saw a decline in the MICE segment, with the decline in travel from the government and business sectors.

Has Indian market picked up in the last few years in terms of growth? Why or why not?

There has been a visible and a definite growth in the market. It is more evolved now, guests are demanding varied services, multiple innovations across services and the industry as well is flourishing with more supply each year. The industry continues to witness high occupancy and ARR's, thus, continuing to show promising progress. This is true across segments from luxury to premium and economy. One of the noticeable evidences is the availability of hotel brands and properties panning across luxury, mid-scale, economy, etc. They have many options to choose from based on the nature of travel, be it for leisure or work. MICE is also an important aspect to help this sector grow.


We also cannot deny the contribution of digital and technological innovation to the hospitality industry. Be it internal processes or software for multiple functions and departments or the social media platforms used by guests, technology has eased down everything for both hoteliers and guests.

Will Indian market see any new Accor brand in the upcoming year?

As shared earlier, we will be bringing the much-awaited iconic Raffles brand to India in 2020. Banyan Tree, SO, SLS, Delano, Mondrian amongst others are some of the brands which have potential growth and audience in the Indian market.

Story of Sarovar How it all began

Ajay Bakaya joined Sarovar Hotels in 1996. Ever since, the group has come a long way with 86 hotels globally. We trace the journey of the brand right from the beginning.

 Anupriya Bishnoi



Can you explain your Africa story?

Our Africa story happened fifteen years ago. I knew nothing about Nairobi and its hotel market. But someone was opening a hotel then and was looking for an Indian hotel management company and we grabbed the opportunity. That's how Nairobi story took off for us.

Something interesting that I would like to share is- we cannot use Sarovar brand in Kenya because the latter has a company named 'Sarova'. We just use our 'Infinity' symbol there and mention 'operated by Sarovar Hotels' under it. There is tremendous amount of potential in this part of the world and Sarovar is growing strong ever since.

Which country has been on your list?

I want to be in the UAE for sure. We were there a couple of years ago and our hotels went from two to three and then we were going to graduate to four-star hotel category. But that didn't work out and we pulled out. But, every time I look at the Middle East, people have always asked for a lease model, which we don't work on or financial participation, which we won't do outside the country. But Dubai/ Middle East will certainly be the next thing for us for the simple reason that I can source business and talent from both Africa and India.

Is there any impact on Sarovar Hotels post Jet's closure?

I don't think so. It's a sad story for India for sure but I don't think we have had any direct effect- certainly not in any significant manner. But Jet's business was grabbed very quickly by other airlines in terms of seats in the air. What impacted us was demonetisation- ripples of which we feel even now. It sucked a lot of cash out of the system and its combination with rates of real estate going down, did no help. Our big wedding hotels in Punjab have been impacted. The number of functions guests used to indulge in, got reduced. Someone who was holding a 4 to 5-day celebration, has now come down to 2-3 days. The impact of this has been massive on the industry.

What's your 2020 outlook?

We are looking forward to open around 10-15 hotels in 2020 and I hope to crack 100-hotel mark by the end of this year. Right now, we have 86 hotels. We are also working laboriously through Golden Tulip transition. Now, Golden Tulip has 20-25 hotels, but we are looking at taking over only a few hotels and building the brand in India.

| Location | Hotels | Rooms | Expected completion / takeover date |
|--|------------------|-------|-------------------------------------|
| Rajahmundry Convention Centre | | | Jan-20 |
| Bodh Gaya | Sarovar Premiere | 80 | Jan-20 |
| Panipat | Sarovar Portico | 50 | Feb-20 |
| Morbi | Sarovar Portico | 59 | Mar-20 |
| Katra | Sarovar Portico | 42 | Mar-20 |
| Dibrugarh | Sarovar Portico | 52 | Apr-20 |
| Greater Noida West | Sarovar Portico | 72 | Apr-20 |
| Latur | Sarovar Portico | 46 | May-20 |
| Dalhousie | Sarovar Portico | 60 | May-20 |
| Dhamtari (Bardiha Lake View Tourist Cottage) | Sarovar Portico | 60 | Sep-20 |
| Korba (Madai Tourist Resort) | Sarovar Portico | 50 | Sep-20 |
| Udaipur | Sarovar Portico | 60 | Sep-20 |
| Jalandhar | Park Plaza | 80 | Oct-20 |
| Jagdapur | Sarovar Portico | 52 | Oct-20 |
| Rajahmundry | Sarovar Premiere | 100 | Oct-20 |

There's more...

Sarovar Hotels is part of Paris headquartered Louvre Hotels Group with a portfolio that now includes 2,500 hotels in 52 countries. It has a full hotel offering, spanning 1 star to 5 stars, with the Louvre Hotels Group's historic brands (Golden Tulip, Royal Tulip, Tulip Inn, Première Classe, Kyriad, Campanile,) and three brands of Sarovar network in India:



Louvre Hotels Group is a subsidiary of Jin Jiang International Holdings, the 2nd largest hospitality group in the world.

| Brand Category | Numbers | Keys |
|---|---------|------|
| Sarovar Premiere | 11 | 931 |
| Sarovar Portico | 53 | 3390 |
| Homitel | 09 | 914 |
| Radisson Blu | 01 | 218 |
| Radisson | 02 | 301 |
| Park Plaza | 05 | 435 |
| Park Inn | 03 | 259 |
| Golden Tulip (Lucknow) | 01 | 115 |
| Harlalka Haveli- Mandawa (A Sarovar Heritage Hotel) | 01 | 11 |
| TOTAL | 86 | 6574 |



DID YOU KNOW?

Sarovar Hotels was founded in 1994 by Anil Madhok, a hotel industry expert on India, Singapore and Sri Lanka markets. It is also run by Ajay K. Bakaya, who joined Sarovar in 1996 and Mansoor Adil, who joined in 1998. They have built the company into a robust and effective hotel platform combining marketing, human resources, operations, management and technical services. The company manages 86 operational hotels in 55 destinations in India and overseas.

Which are the best performing cities for Sarovar in India?

Bengaluru, Hyderabad and Mumbai are our top performing cities.

What about your Delhi-NCR story?

Delhi-NCR is a steady story, but I won't call it a lead one.

Any significant MICE rendering on Sarovar's radar?

Sarovar is going to open a convention centre in Rajahmundry, Andhra Pradesh, which is going to be more of a wedding hotel than a MICE hotel. It's linked very closely to port of Kakinada, Vijayawada, Vizag, Hyderabad, etc. The convention centre should open by March 2020. The hotel, a part of the convention centre, will open a little later. The facility will have 30,000 square feet area which will accommodate approximately 3000 people.

Any caution going into 2020?

The fundamentals are not going in the right direction. Our economy is not doing great. Real estate is in a very bad shape. We will go into 2020 with a whole lot of caution saying, 'Lets keep our belts tightened'. Right now, everyone is rejoicing and till March everyone should be alright, but once the foreign tourists go back and wedding season is over, we will see how the industry unravels itself. Also, the kind of boom we witnessed in the resort business in the country, is not there anymore. We never had problem selling resort properties but now we do. I think, personally I feel a lot has got to do with the fact that the cash is not there in the system.

Sarovar has always cultivated modesty- is that reasonable in a world where showing strength is appealing to investors?


We don't flaunt about what we do but we are extremely positive in our approach. We have carried advertisements on television, we are extremely strong in the mid-market segment and probably the largest player there. But overall, we stay grounded and humble as we should, but we are not so modest about our brand, if I may say so!

“We are extremely strong and probably the largest player in the mid-market segment”



Will Kempinski return to India?

Martin R. Smura, Chief Executive Officer, Kempinski Hotels and Chairman of the Management Board, talks exclusively with Hospitality Talk about the brand's exit from India and a comeback anytime soon.

 Anupriya Bishnoi

Can you explain in detail about the expansion plans of Kempinski, globally?

At Kempinski, we are focusing on ambitious international expansion plans as part of our long-term strategy. Our goal is to operate more than 100 luxury hotels by 2021. In the next 12 months alone, nine new hotels with a total of 1,961 rooms and suites will open: three of them in the Caribbean and one hotel in Tel Aviv, Tbilisi, Bangkok, Guangzhou, Brazzaville and Almaty respectively. And further seven hotels with 2,404 rooms are currently under construction.

Part of the development growth plan is the opening of the very first Kempinski hotel in New-York in partnership with the German 12.18 Investment Group. Originally built in 1927, the property is strategically located in Manhattan's central and fashionable Midtown East, close to the Rockefeller Center and the Museum of Modern Art, and will go through a total refurbishment before re-opening as the 7 Pines Kempinski Manhattan by the end of 2020.

So far, the Kempinski strategy was based on management contracts. We sell management know-how to hotel owners for a fee. In future, our expansion won't be only based on management contracts but also on the acquisition of properties in order to leverage our core business of hotel management services to create additional value through real estate. We will only focus on hotel development projects that can deliver the brand promise in terms of product and performance.

Which are the latest innovations in terms of facilities and services at Kempinski hotels worldwide?

At Kempinski, we strive to offer tailored guest experiences. We have launched our guest intelligence tool to better anticipate guest requirements and assure a seamless experience to them. Our guest intelligence tool is combined with our guest messaging hub. We are one of the first hotel



companies to implement globally a consistent, systematic and centralised guest messaging service, and are one of the few to have the WhatsApp business API.

With growing competitiveness in many markets around the world, what are you doing to stay ahead of the competition? Are you also going to consider renovating and revamping old Kempinski properties?

We are a small group compared to the big hospitality players around the world. However, our small size gives us agility and creativity. We play to our strengths, focusing on building relationships with individual owners. We focus on our long-term value strategy, getting each hotel to meet the high expectations of our discerning guests as well as investing massively in our people with training, talent development and education to maintain the highest level of service. When it comes to renovation, we ensure that every hotel has a proper improvement plan in place. We support our owners and investors to stay ahead of the competition and invest in a meaningful and sensible way in their properties.

Which are the top 3 markets for Kempinski. And what is your strategy to attract tourists/guests from other countries? Is there any particular country/countries you have in mind to tap? Why?

Our top business drivers are 1- China, 2- Germany, 3- USA. Russian and Middle Eastern markets are also important markets for Kempinski. We wish to strengthen our sales capabilities globally to build further awareness about the brand in existing and potential feeder markets as well as pursuing new revenue streams in emerging segments. Today, we have a solid network of sales offices with luxury segment specialists across the globe to further increase brand visibility. We also benefit from excellent commercial partnerships such as ALHI, Virtuoso, Signature and Ensemble on the US market for instance, which allows increasing our brand visibility in this market.



India has high potential for future growth in the hospitality sector. For this, we plan to intensify our efforts to bring Kempinski back to India"



DID YOU KNOW?

Kempinski Hotels is the oldest luxury hospitality group in Europe with a story that started more than 120 years ago. The brand tapped into the market in 2018 and opened a Global Sales Offices in partnership with Nijhawan Group. Since then, the revenue from the Indian market increased by 30%.

We continue to leverage our cooperation with Global Hotel Alliance as one of its brand members. The alliance provides Kempinski with an additional global network of sales, marketing and distribution across 51 countries. It also gives us access to 16 million members, and thus potential customers, worldwide, through its loyalty programme.

The number of Chinese travellers continues to rise year on year, whether it is inside China or abroad. Kempinski Hotels already benefits from a strong presence and reputation in China and we have a Kempinski hotel in most of the big cities and feeder markets. We also have implemented minimum operational standards to accommodate our guests from China.

India is a growing market to us where we see huge potential for future growth for outbound travellers. Several of our hotels already enjoy a strong wedding business from India. We tapped into the market in 2018 and opened a Global Sales Offices in partnership with Nijhawan Group. Since then, we see very promising results with revenue from the Indian market increasing by 30 per cent.

Kempinski had a long relationship with Leela in India. After the association got split, Kempinski exited the country. Why did it happen?

Kempinski Hotels and Leela Palaces Hotels & Resorts enjoyed a fruitful 25-year relationship which helped both companies to considerably increase brand awareness within the country. At the time, both companies had different views on brand positioning in the Indian market.

However, as longstanding members of Global Hotel Alliance (GHA), we are still partners, significantly benefiting from the expertise and services delivered by GHA which Kempinski Hotels is a main shareholder of. We very much look forward to further strengthening our collaboration in future.

Are you planning to relaunch the brand in India anytime soon?

India is a very dynamic market and offers enormous potential for future growth in the hospitality sector. Our plans are to intensify our efforts to bring Kempinski back on the Indian sub-continent.

Can you explain some of the distinct features of Kempinski that set it apart?

Kempinski Hotels is the oldest luxury hospitality group in Europe with an authentic story that started more than 120 years ago. We value individuality over uniformity and this is reflected in each of our unique locations as well as in the way we operate and engage with guests, owners and colleagues.

Are there any challenges you want to highlight that you face while operating a luxury hotel chain like Kempinski?

As an independent private luxury group, one of the main challenges we are facing right now is public-listed companies buying out hotel management contracts which are up to renewal, with upfront payments. This is a challenge we faced lately with our recent exits. As a non-public listed company, we don't pursue such a strategy.



We are one of the first hotel companies to implement globally a consistent, systematic and centralised guest messaging service and one of the few to have the WhatsApp business API"





InterGlobe's design eye

Arun Raju, VP and Head of Projects, has been an integral part of the InterGlobe Hotels in setting up some of the finest hotels in an optimum cost-effective manner.



Kanchan Nath

What is so peculiar about designing InterGlobe Hotels?

InterGlobe Hotel's design philosophy is not restricted to create impressive aesthetics only; rather it is driven by overall end user experience and operational functionality. Our design endeavour is to keep brand renewed, contemporary and relevant to dynamic customer expectations. Every design decision is oriented to enhance consumer experience, offer modern facilities, and yet remain affordable so that the brand remains profitable. With a strong focus on guest experience and to cater to their increasing expectations, we emphasise on the development of extensive and innovative room concepts with high recognition value and strong individual character. We also pay lot of attention to non-guest interfacing areas like back of the house, which at ibis are planned in such a way that it looks modern, vibrant, and spacious so that our hotel staff stays energised. We also plan to provide various facilities to suit millennial staff and enhance engagement levels to make it a great place to work.

While we thrive to attain a fine balance between pulsating aesthetics and warm living spaces, there are other aspects too which we adhere to so that our hotels are future ready. Furthermore, each new location brings its own peculiarity in terms of its market demands, social attributes, end user sensibilities, climatic conditions, statutory compliances, etc.

How exactly are you ensuring that owners and investors end up making the maximum profit in building a project?

We have robust practices to keep checks and balances on project cost and timelines. All project activities are mapped against the project schedule duly signed off by all stakeholders. The master schedule is mandated to internal as well as external partners engaged in planning and construction. Site progress is monitored daily and as per the management information system, progress reports are circulated on periodic basis so that



“We have imbibed a culture to stay responsive. We keep challenging the architects & designers for design concepts which are modern yet sustainable”

all the owners stay informed. At an enterprise level, there is a relentless urge to deploy best practices, build competent team, have succession plans in place, develop process oriented systems rather than people oriented so that projects get completed within stipulated success parameters, which eventually benefits owners and investors.

Moreover, every opportunity is explored to maximise project yield with respect to number of keys, seating capacity in all day dining and banquet rooms which contribute to operational revenues.

As far as sustainability is concerned, how is that being achieved in your projects?

At InterGlobe Hotels, sustainability and minimising environmental impact are key priorities. As an enterprise mandate, IGH plans to go for Green Certification for all its upcoming properties. We believe that small and definitive steps towards change and improvement will go a long way in ensuring environmental sustainability. It's a fact that a green environment will improve the standard of living of citizens, the economy and the planet at large. Given the times we live in, sustainability is a power term that signifies smart living.

Our newest hotel Ibis Kolkata, opened in 2019 has been certified with IGBC Gold rating on the following parameters:

- Strict green building norms followed for construction at site
- Features ample green areas and landscaping
- Use of eco-friendly building materials
- High performance, energy efficient glazing and enriched daylight ingress
- Water saving fixtures
- Direct view to outdoors and water conservation
- New food & beverage direction has ensured lesser food wastage. More meal in a bowl, pre-proportioned plated meals are being tested and employed. Key focus and emphasis is on balanced diet and healthy living.

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The 'no-use' of single-use plastics

Punish B Sharma, Vice President – Operations, The Fern Hotels & Resorts, talks about the viability of hotels getting rid of single-use plastic and combating with pricing issues.



HT Bureau

Almost every hotel brand these days is getting rid of single-use plastics. How viable is that?

Many hotels are moving away from single-use plastics and adopting biodegradable products. The hotel industry has been proactive in driving change by complying with regulatory norms and acquiring eco-friendly measures. Collective efforts of industry will significantly reduce single-use plastic.

Did Fern always had sustainable materials across its properties unlike other hotels?

The Fern is very conscientious about environment and is rooted in environmentally sensitive basics. The Fern delivers much more luxury with elegance and personalised service, and all the contemporary facilities packaged together with minimal impact on the environment

Listed below are few of the practices used in operations:
HANGERS-The hangers used in guest rooms are made from rubber wood.



Our key markets include China, India, Europe and the Middle East”

Did You Know

The Fern Hotels and Resorts has launched, 'Fern Saves Water; aims to save 100 million litres of water in a year.

The Fern Hotels and Resorts has started an initiative “Fern Saves Water”. The main purpose of the initiative is to fix leaking taps in houses across India for free of cost. The company is aiming to saving 100 million litres of water in a year. Fern has carried out this initiative in 7 cities – Hyderabad, Jaipur, Kolkata, Mumbai, Pune, Rajkot and Ranthambore. Each fixed tap saved around 1,000 litres in a month and this way they were able to fix 10,000 taps.

AMENITIES- Keeping in mind our environment theme, we use herbal products which are manufactured under an Ayurvedic license; these products are not tested on animals and do not contain any animal fat.

LAUNDRY- We have reusable cloth laundry bags instead of the standard paper or plastic bags as in other hotels, in which the guests could send the clothes for laundering and the same will be delivered in reusable cane baskets wrapped in muslin cloth.

SLIPPERS- Even the stylish slippers in rooms are hand crafted from jute for your comfort. We have also invested in water treatment and bottling plants at our premises to reduce the plastic bottles from rooms and restaurant.

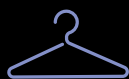
Is keeping a hotel plastic free costlier? If yes, what are the other ways where you are bringing the cost down?

I won't say it's costlier. It does not hit the cost factor if well-planned and streamlined. Yet, to bring the cost down we follow set operating process like bulk purchasing, instead of buying 1 or 2 kg material wrapped in plastic bags we acquire 5 kg material in returnable cloth bag. Vendors are from the vicinity which cuts down the transportation cost.

When it comes to environment, how is Fern Hotels & Resorts standing out?

The Fern is constantly concerned about environment, sustainability and is known as a champion of green policies. We always look for ways to implement new ideas and to stay at the forefront of environmental stewardship. Sustainability is not merely a philosophy, but a way of life.

THE FERN'S SUSTAINABLE BASICS



HANGERS

The hangers are made from rubber wood.

AMENITIES

We use herbal products which are manufactured under Ayurvedic license and are not tested on animals.



LAUNDRY

We have reusable cloth laundry bags instead of the standard paper or plastic bags as in other hotels.



SLIPPERS

The slippers in rooms are hand crafted from jute.





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- Dimitris Manikis, President and MD - EMEA, Wyndham Hotels and Resorts
- Federico J González, President and CEO, Radisson Hospitality AB
- Jean-Michel Cassé, COO - India and SA, Accor
- Kenneth Macpherson, Chief Executive Officer - EMEAA, IHG
- Puneet Chhatwal, Managing Director and CEO, IHCL
- Radha Arora, President, Rosewood Hotel Group

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Food for thought & more

FHA-HoReCa 2020 Conference is scheduled for March 3-6, 2020, at Singapore Expo, providing prime platform for the global industry to share their knowledge and discuss issues pertaining to the hospitality industry today.



The FHA-HoReCa 2020, Conference will be held from March 3-6, 2020 at Singapore Expo, where world's leading hotels, restaurants and café suppliers will gather to showcase the latest foodservice and hospitality equipment, products and services across five key profiles- Bakery, Pastry & Gelato; Foodservice & Hospitality Equipment; Hospitality Style; Hospitality Technology; and Speciality Coffee & Tea, serving 48,000 discerning distributors, importers, manufacturers and retailers from Asia, under one roof.

The new Hospitality 4.0 Pavilion at FHA-HoReCa will throw a spotlight on new capabilities powered by technology for front-of-house to back-of-house operations for the HoReCa sector. Attendees will learn

how AR/VR, Robotics, 3D Printing and IoT-enabled products and services can help streamline operations, deliver higher efficiencies, lower costs, and increase customer satisfaction. Highlights at the pavilion include a Start-up Village and Dreamcatcher Theatre, as well as a showcase of innovative products and services for hotels, restaurants and kitchens.

Beyond the show floor, attendees can catch some of industry's brightest talent in action as they pitch their skills in a series of competitions. Competitions held during FHA-HoReCa include the inaugural Artistic Bakery Challenge and Asian Junior Pastry Cup, Asian Pastry Cup, Asian Gelato Cup, FCC Individual Challenge – Patisserie, Barista Super Duo Challenge and Latte Art Showdown.

The FHA-HoReCa 2020 Conference will present an unrivalled line-up of global industry leaders to share their knowledge and experience. Delegates and speakers will get to discuss the most pressing and transformational issues confronting the hospitality industry today.

“The Pavilion at FHA-HoReCa will throw a spotlight on new capabilities powered by technology”



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Learn from the Best



- › Gain fresh insights from industry leaders at **FHA-HoReCa Conference**, as well as a series of free seminars led by subject experts at **Hospitality 4.0 Dreamcatcher** and **HoReCaTheatre**.

Discover the Latest Trends



Hospitality 4.0

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EAST AFRICA

The Luxury Collection debuts in the Seychelles

The Luxury Collection has announced the opening of North Island, Seychelles. With just 11 villas, Africa's most exclusive private island is located 30 kilometres from the mainland and is accessible by a scenic helicopter flight or an hour boat ride, giving guests an immediate sense of escapism.



SOUTH INDIA

Accor and Arora announce agreement to bring iconic Fairmont brand to Windsor

Accor and Arora Group, one of the UK's leading hotel owner-operators have announced the signing of a prestigious luxury hotel, Fairmont Windsor Park. The hotel is currently undergoing a substantial multi-million-pound redevelopment and is set to open in the second half of 2020.



SOUTH EAST ASIA

Hilton Hotels to extend hospitality to homeless in Kuala Lumpur

Hilton has announced its partnership with non-governmental organisation Street Feeders of Kuala Lumpur (KL) to extend its hospitality to the homeless and urban poor in Kuala Lumpur, Malaysia. Hilton now extends care packages comprising of basic essential items, including food, water and soap.

ASIA

Hotel Indigo to debut

in Moscow by 2020-end with

100 rooms InterContinental Hotels

Group has signed a management

agreement with JSC "Tverskaya 24",

to open Hotel Indigo Moscow –

Tverskaya by the end of 2020

with 100 guest rooms.

Radisson opens a hotel in Bogotá, Colombia with

337 rooms

The hotel marks the brand's latest roots in the region and will accommodate business and leisure guests travelling to popular spots of the region.



ASIA

Hyatt Regency Hengqin opens in Southern China

Hyatt Hotels Corporation has announced the opening of Hyatt Regency Hengqin in Zhuhai, Guangdong Province, China. With 493 rooms, six dining outlets, and 40,440 square feet (3,757 square metres) of event space.

AAHAR 2020 from March 3-7

Providing an opportunity to exhibit products, technologies and services to national and international buyers, AAHAR 2020 will attract suppliers from a wide range of industries.



AAHAR 2020 The International Food & Hospitality Fair, New Delhi, will be held from March 3-7, 2020. Organised by India Trade Promotion Organisation, AAHAR is a destination for global vendors and sourcing professionals. The show is an opportunity to exhibit products, technologies, services to national and international buyers, generate sales leads, order bookings, networking with the industry, launch new products, appoint agents and distributors, promote company products etc.

India's food & grocery market is the 6th largest in the world. Indian food sector is a high-growth sector with immense potential for value addition. It is expected to touch US\$



The food processing industry in India accounts for 32% of the country's total food market"

482 billion by this year. The food processing industry in India accounts for 32% of the country's total food market & 14% of the manufacturing GDP. It is estimated that the food processing sectors have the potential to attract US\$ 33 billion investment in next 10 years.

Increased inflow of foreign tourists and business visitors, as well as exposure of the Indian middle class to foreign lands, are among the major reasons leading to growing demands for foreign cuisine and ingredients. With the government keen on promoting value addition in the food sector, Indian companies too have taken the initiative in a big way, resulting in a growing domestic demand for processed food.

Rajendra Prasad Mittal gets re-elected as AIACRA's President

All India Air Conditioning & Refrigeration Association has elected **Rajendra Prasad Mittal** as its President for the fifth time. He plays a pivotal role in voicing the industry's issues.

All India Air conditioning & Refrigeration Association (AIACRA) elects **Rajendra Prasad Mittal**, Director, Mittal International, as the President for the fifth time. Mittal is involved in the association's activities and has worked diligently to make it as one of the best.

Under his leadership, the association has become the voice of the industry. Also, he has played a significant



role in building strong relationships with numerous countries like China, Korea, Turkey etc. by signing MoUs. Some of the key responsibilities of AIACRA include, arranging general body meeting from time to time where its activities are presented, and a detailed review of the industry is made.

The Association operates through expert panels representing various sectors of the industry and is also responsible for arranging seminars, workshops, interactions with ministers, senior government officials etc.

Mittal is responsible for streamlining the intricacies and addressing the issues faced by the members of the association.



The Association operates through expert panels representing various sectors of the industry"

'Sealy'ed with a good night sleep

Vinod Khatri, National Manager - Contract Sales, Sealy India, talks about the importance of mattresses/beds even for the housekeeper. Happy guests are more likely to share good fulfilled experience which is vital for the hotel brand.

Mattresses play a very important role as the guest's prime requirement is the comfort and a very good night sleep rejuvenates the body. Mattresses/beds is an important aspect even for the housekeeper. Guests look forward to a comfortable stay and the mattress/bed plays a major role in their overall comfort. The house keepers ensure the overall upkeep of the room, bed, mattress, washrooms and pantry area. In today's world where everything is digital, guests are particular about sharing their experience



whether good or bad on the hotel website and a happy guest who has had a good night sleep on a comfortable mattress will definitely share good fulfilled experience which is vital for the hotel brand.

So, selecting a right mattress is important as it enhances the overall hotel brand experience. Mattresses were perceived as commodity in 2 or 3-star properties. The 4 and 5-star hotels always gave more importance on selection of the right mattress.

CHALLENGES

We generally get demands from the hotels for modifying the bed base to meet the total height requirement which is crucial for the designer. Sealy has multiple options even in the bed base and the height can be adjusted by using castors, glides, which are available in different heights.

We design different specifications keeping in mind the requirement shared by the hotels in the likes of firm, cushion Firm, Plush and Ultra Plush. Sealy offers various options under its collection of UniCased, UniSided and Double-Sided technology to cater a wide demand placed by the hotels



Sustainable behind the scenes

Did you know that one can contribute to sustainability even from the kitchen? **Vikram Goel**, Managing Director, RATIONAL India, talks about how the brand's products are contributing in climate protection.

For some, climate protection is about producing less CO2 from driving cars or less food waste, for others its about not using plastic packaging anymore. There are a myriad of ways to be sustainable, and these do not stop at large and commercial kitchens. An increasing number of guests want both a healthy meal and more sustainable production. This makes things in the kitchen more complex: Menus need to have more vegetarian dishes and regional food, and at the same time these need to be made using less electricity. Consumers are asking more and more questions about the sustainability aspects of a restaurant, which restaurateurs need to be able to answer.

But it is not only large and commercial kitchens that are thinking about how the hospitality industry can contribute to climate protection. According to its sustainability report, the company would like to contribute to assuring an intact and natural basis of life for future generations with environmental-friendly products and health-promoting cooking methods. Above all, however, the cooking appliance manufacturer supports restaurateurs: Rational units require up to 40% less electricity and up to 10% less raw materials - compared to conventional kitchen technology. The reason for this is intelligent



“
Rational units
require up
to 40% less
electricity and up
to 10% less raw
materials”

technology, which the SelfCookingCenter has. Probes recognise when which quantity of energy is required and the unit supplies this to the food uniformly and in a targeted way. Cooking processes are adjusted individually which reduces the weight and cutting losses, ensures nothing burns or boils over. We estimate that a little more than 600,000 rational units are currently in use around the world, which according to our estimate produce up to 130 million meals a day. With resource-efficient units, we can therefore make a significant contribution to protecting the environment.

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Giant 2- Slush and Juice Dispenser



Fully Automatic Coffee Machine



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« SUDEEP JAIN

Managing Director, South West Asia

IHG

InterContinental Hotels Group appointed Sudeep Jain as Managing Director, South West Asia (SWA). In his new role, he will take on a broader leadership agenda to drive IHG's business in the region, covering both development and operations.



« PARMEET SINGH NAYAR

VP Operations and General Manager Hospitality

MBD Group

Parmeet Singh Nayar appointed as VP Operations and General Manager Hospitality of MBD Group. Nayar will support the growth of MBD Hospitality in Indian market and oversee the performance of the group's hotels in the region.

KERRIE HANNAFORD »

Vice President Commercial

Accor India & South Asia

Accor has appointed Kerrie Hannaford as Vice President Commercial for Accor India & South Asia. An industry Sales & Marketing veteran, Kerrie has been part of the Accor family since past 15 years. After holding responsible positions at IHG and Starwood Hotels in Australia, she joined Accor in 2005.



SUBHASH SINHA »

General Manager

The Westin Kolkata Rajarhat

Subhash Sinha has been appointed as the General Manager of The Westin Kolkata Rajarhat. Prior to joining The Westin Kolkata Rajarhat, he achieved outstanding results in his role as General Manager of Marriott Suites Pune. Before this, he was also associated with the Oakwood Group of Hotels.



« JAMESON SOLOMON

General Manager

Swissôtel Kolkata

Swissôtel Kolkata has announced the appointment of Jameson Solomon as the new General Manager. Prior to joining Swissôtel Kolkata, he was working with Leela Palaces, Hotels and Resorts as Head of Operations located in South Mumbai.



« RAHUL PANWAR

Hotel Manager

Novotel & ibis Bengaluru Outer Ring Road

Rahul Panwar has been appointed as Hotel Manager at Novotel and ibis Bengaluru Outer Ring Road. Rahul's last assignment was as an Executive Assistant Manager at the 462 keys Novotel Phu Quoc Resort & Villas in Vietnam.

RAHUL SHARMA »

Hotel Manager

Courtyard by Marriott Amritsar

Rahul Sharma has been appointed as the Hotel Manager at Courtyard by Marriott Amritsar. While serving as Director North India for Starwood Sales Organization, he was responsible for the Management of Starwood's Key Global Accounts, RFPs, Wholesale, MICE, Meeting Financial KPIs and Sales Liaison.



SABU RAGHAVAN »

Vice President,
Human Resources, India

Hilton

Hilton has appointed Sabu Raghavan as VP, HR, India. With over two decades of experience in human resources in the education and hospitality industry, Sabu's new role will see him focusing exclusively on India, working closely with Hilton's leadership team.



« VIKAS MITTAR

Director of Finance

Novotel & ibis Bengaluru Outer Ring Road

ibis and Novotel Bengaluru Outer Ring Road has appointed Vikas Mittar as Director of Finance. His wealth of experience of the hospitality industry is critical to his role as the Director of Finance at the business hotel.



« VIJAY RAMAMOORTHY

Director of Marketing

Four Seasons Hotel Bengaluru

Vijay Ramamoorthy has been appointed as Director of Marketing at Four Seasons Hotel Bengaluru. Vijay has over 19 years of experience in hospitality sales from The Oberoi Group in India. In his current role, he will be responsible for overseeing the dynamic Sales & Marketing team.





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The Fern Residency, Jodhpur | The Fern Residency, Karad | The Fern, Lonavala | The Fern Sattva Resort, Polo Forest (Gujarat)
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