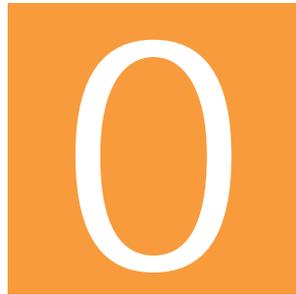
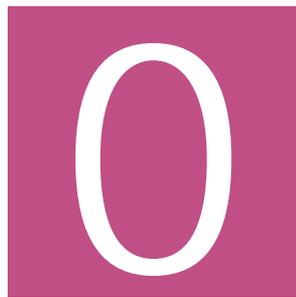




RETROSPECT



AGENDA



Leading hotel managers throw light on what the year 2015 meant for their establishments and the hospitality industry and what they expect in 2016.



Anupriya Bishnoi & Kanchan Nath

The year 2015 has been good for the Indian hospitality industry. The Indian travel and tourism industry saw a spurt in growth this year on the back of the new visa reforms. The number of foreign tourist arrivals has grown, and had reached about 4.48 million during January-July 2015.

Foreign exchange earnings (FEEs) from tourism in terms of US dollar grew by 3.2 per cent during January-July 2015 as compared to 1.9 per cent over the corresponding period of 2013. FEEs between January-July 2015 were US\$ 11.41 billion compared to US\$ 11.06 billion in the same period last year and the growth rate in FEEs in rupee terms in January-July 2015 was 6.9 per cent. Domestic tourism also grew this year, with lowered room rates and discounts offered by hotels, resorts and airlines pushing it

up, particularly in the Monsoon season. Investments in the sector have risen as well.

Tourism in India continues to have significant potential because of the country's rich cultural and historical heritage, natural beauty and variety in ecology, terrains and places across the country.

The Indian government, having realised the country's potential in the tourism and related industries continues to take steps to make India a global tourism hub and to encourage the hospitality sector. With the economy doing better as well, the outlook for 2016 for the hospitality sector is positive. It is in this context that leading hoteliers tell us how their hotels and brands fared in 2015 and what their plans and expectations are for 2016.

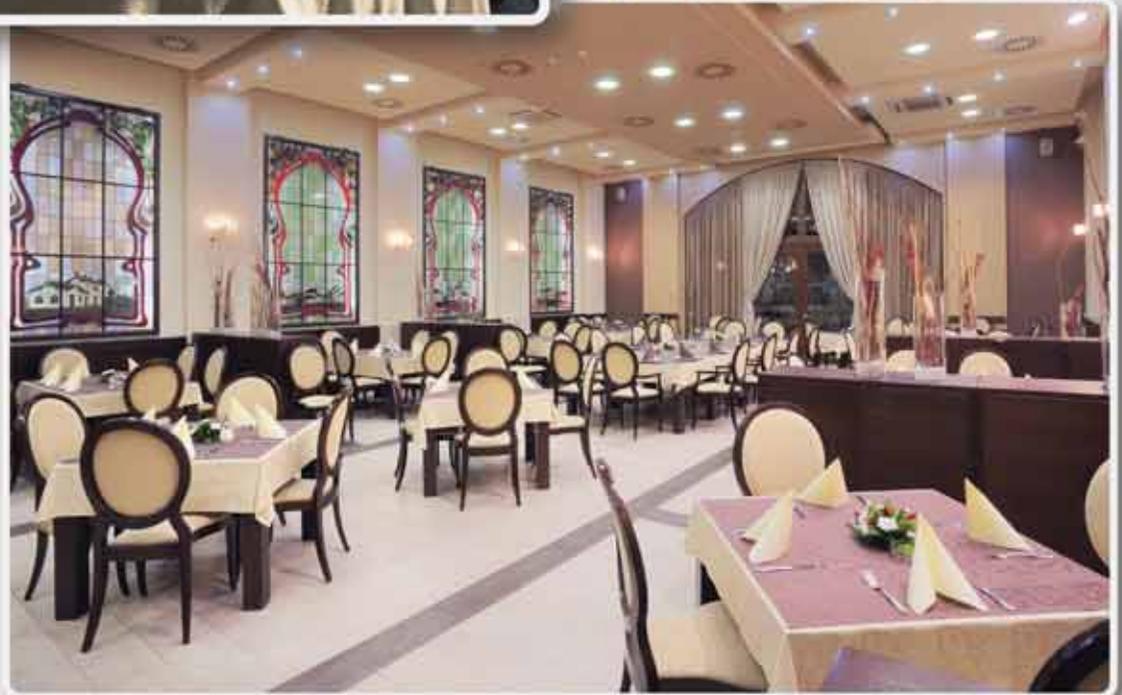
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Ajay Bakaya



Sarovar Hotels consolidated its presence by cutting costs and putting in energy conserving measures



AJAY BAKAYA

Executive Director
Sarovar Group

How has the year 2015 been and what are your expectations from 2016?

India's hospitality sector experienced a fair upturn in 2015. We have had a prolonged sluggish situation due to various factors including the economic slowdown. In fact, the hotels' rates have still not bounced back to 2007 levels. We have lately decided not to continue with our weakest hotels when it comes to renewal and to pick up stronger and more distinguished properties as we go forward. So our portfolio becomes richer in terms of profile. Despite challenges, we opened six hotels this year. We are confident of opening 10 hotels every year and have an over 90 per cent renewal track record. 2015 brought Sarovar new properties in Vrindavan, Mashobara-Shimla, Thiruvananthapuram, Agra and Nairobi-Africa.

Due to the economic sentiment, the last few years have been tough for the hospitality industry in the country. Sarovar Hotels managed to consolidate its presence by cutting down on costs and putting in a lot of energy conserving measures. I believe 2016 will be a turning point for hotel operations as well as for new hotel development.

Sarovar has invested in two hotels—Hometel at Chandigarh and Hometel at Roorkee. It manages over 70 hotels and resorts in 48 cities under Sarovar Premiere, Sarovar Portico, Hometel, Radisson, Park Plaza, and Park Inn brands. We will launch 10 hotels in 2016 in New Delhi, Amritsar, Bhavnagar, Dehradun, Jaisalmer, Jalandhar, Greater Noida, Raipur, Rishikesh and Vandalur - Chennai. We operate three hotels in Africa—New Africa Hotel in Dar-es-Salaam; The Heron Portico in Nairobi, and The Zehneria Portico, Nairobi. Our fourth Africa



hotel, the 134 room 5-star property at airport (Jomo Kenyatta International Airport), Nairobi is scheduled to open in 2016.

Sarovar's long term strategy is to strengthen its portfolio, sign up more upscale hotels and not renew any that take away from the Sarovar brand.



Deepika Arora



The key to our success is our franchise based model and our geographical expansion to tier II and III markets



DEEPIKA ARORA

Regional Vice – President, Eurasia
Wyndham Hotel Group

How has the year 2015 been and what are your expectations from 2016?

The year 2015 has been fantastic for the overall growth of the Wyndham Hotel Group. We have grown nearly 200 per cent in a span of five years with 25 operational hotels and another 28 properties under development in India. This was a phenomenal year for us as our Global Chairman, Stephen Holmes, visited India to make a strategic announcement of 10 new deal signings including two new property conversions under the Howard Johnson brand and Ramada Plaza with the Unique Mercantile Group. This year, we have also signed our first ever deal outside India with the Intraco Limited based out of Bangladesh which includes Ramada Encore Dhaka, Ramada Plaza in Cox's Bazar, Ramada Chittagong and Ramada Comilla.

The key to our success is our franchise based model and our geographical expansion to tier 2 and 3 markets which we realised was a huge opportunity. In addition to working with accomplished independent owners, we also look at partnering development and management companies that help us grow the business exponentially.



With increasing economic growth, we are expecting a potential growth in domestic, leisure and MICE travel in the coming year which will in turn boost revenue from a tourism stand point and help propel India's economy. We also believe that the government is making the right moves and announcements like e-visa facilities which will help the tourism industry flourish.

India is a strategic market for the Wyndham Hotel Group and we will continue to focus on the overall growth strategy in 2016. We are also expecting to move from the challenger position to a leadership position in the near future.

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Sonica Malhota



SONICA MALHOTA
 Director
 MBD Group

How was the year 2015?

2015 has been a good year for both Radisson Blu MBD Hotel Noida and Radisson Blu Hotel MBD Ludhiana. Growth has remained strong in Noida and Ludhiana has been a key emerging market for us.

In 2016, we anticipate higher growth in Ludhiana with rising occupancy and higher Average Daily Rate (ADR) than 2015. Restrained supply growth is helping us in Noida. We expect to be busier and more profitable in 2016 and RevPAR growth will continue marginally.

What were the highlights of 2015?

In its 12 years, The Radisson Blu MBD Hotel, Noida has defined itself as a trendsetter. In 2015, this hotel won the prestigious Country Winner Award under the Luxury Hotel Category by The World Luxury Hotel Awards.

Radisson Blu Hotel MBD, Ludhiana has received a TripAdvisor Certificate of Excellence Award, the 2014 Award of Excellence by booking.com and the Bronze certification from Earth Check.

Changing times require speedy government approvals and uniform licenses to save time and money. A lot of the talent graduating every year is not qualified for recruitment resulting in a gap between demand and supply of human capital. This year, we launched a unique learning curriculum called Management and Supervisory Development Programme in hospitality.

2016 will witness newer restaurant concepts and exciting food innovations. Moreover, the MICE business and weekends and festivals will draw higher numbers.

What is your agenda for 2016?

The group is coming up with the MBD resort near Jalandhar city, MBD Zephyr, at Whitefield, Bangalore is in the category of luxury mixed-use developments. 2016 will be of mergers and acquisitions and will see more international brands in the Indian mid-market segment. Hotel aggregators will drive the budget hotel segment.

“ Changing times require speedy government approvals and uniform licenses to save time and money ”



Peter Henley

PETER HENLEY
 President and CEO
 ONYX Hospitality Group

How has the year 2015 been and what are your expectations from 2016?

In a competitive hospitality environment which has seen a rapid growth in product offerings over the last five years, our portfolio is continuing to perform well in terms of occupancy rates and guest satisfaction and has a strong growth rate. Despite some challenges to the market in Thailand this summer, the group revenue growth by year-end 2015 is forecast to be 15 per cent as compared to last year.

The year 2015 has been an exciting period of development for the ONYX Hospitality Group. We are well on track to meet our strategic goal of managing 81 hotels, resorts and serviced apartments by 2018. The last 12 months have seen the opening of Amari Dhaka in Bangladesh and OZO Kandy in Sri Lanka, making it the first international hotel brand to open in the destination in the last 30 years. The year also witnessed the opening of the brand new Ocean Wing at Amari Phuket, adding an inventory of 183 one-and-two bedroom suites in one of Phuket's most prime locations. The group is also expanding in Malaysia, China and Vietnam with the



signing of new OZO and Amari properties, which are slated to open in 2017.

2016 will mark the group's debut in Maldives with the opening of Amari Havodda Maldives in January 2016, located on one of the most preserved atolls in the archipelago featuring 120 villas. Retaining its iconic location on Chaweng beach, Amari Koh Samui relaunches in April 2016 following an expansion with three new wings. We are also excited about the opening of the Amari Residences Pattaya which is set for April 2016.

With all the positive indicators from 2015 and with the key openings in Maldives and Koh Samui and our 2014 openings entering their second successful year of operations, we are confident of a positive performance for the group in 2016.

“ We are well on track to meet our strategic goal of managing 81 hotels, resorts and serviced apartments by 2018 ”

JEAN MICHEL CASSE

Senior Vice President
Operations – AccorHotels, India

How has the year 2015 been?

2015 has been a phenomenal year for AccorHotels with some major initiatives and developments which have led to a large anticipated growth trajectory. The year 2015 also saw AccorHotels add nine more hotels which included the Pullman and Novotel New Delhi Aerocity and Novotel Imagica Khopoli. With the addition of our luxury and upscale brand, Pullman and Novotel, in the New Delhi Aerocity this year, 670 rooms were added to the India portfolio of 6074 rooms. The opening of the Pullman New Delhi Aerocity marked the opening of our 100th Pullman property globally.

What are the challenges?

2015 has proven to be favourable for the hospitality industry with all its key drivers of growth in place especially with the implementation of pro-tourism initiatives by the new

government, such as visa-on-arrival to drive tourist arrivals in the country. India's vast size and its population, urbanisation, strong emerging middle class, cost-competitiveness and massive talent pool have contributed to a rapid growth in travel.

What is your agenda for 2016?

The year 2016 looks promising for the Indian hospitality industry. Research indicates that India will become one of the fastest growing tourist destinations in the next five years with a growth rate of 10.1 per cent per annum. Reports indicate that the current supply of 2,00,000 hotel rooms in India this year will increase by 50 per cent to reach a total of over 3,00,000 rooms. AccorHotels is working to build a network of hotels straddling multiple brands and segments in line with the country's growth momentum. In addition to 34 in its current and operational portfolio, it has a further 45 hotel development contracts in place and the group plans to open around 80 hotels by the year 2020. We plan to come up with 14 new hotels in 2016 and expand our hotel network to the tier II and tier III cities. We are also looking to invest in a second integrated theme park resort, our first being the Novotel Imagica Khopoli.



Jean Michel Casse



“ Research indicates that India will become one of the fastest growing tourist destinations in the next five years with a growth rate of 10.1 per cent per annum ”

SHANTHA DE SILVA

Head of South West Asia
IHG

How has the year 2015 been?

2015 was an exciting year for us. We announced the signing of the 286-room Crowne Plaza Chennai Adyar Park, the first Crowne Plaza hotel in Chennai. This was followed by the opening of Holiday Inn Chandigarh Panchkula—the 10th Holiday Inn hotel in India. To further expand our Holiday Inn portfolio in India, we announced the opening of Holiday Inn

& Suites Bengaluru—the first Holiday Inn hotel in the Silicon Valley of India. 2015 was also a milestone year for our brand InterContinental. We opened our first InterContinental Resort in India in Chennai, Mahabalipuram. The resort is located in a picturesque location on the East Coast Road overlooking the Bay of Bengal, making it one of the most exclusive properties in the city. Additionally, we opened the tenth Crowne Plaza in the country—Crowne Plaza Jaipur Tonk Road.

What are the challenges?

A number of key areas need to be addressed in order to harness the potential of the sector. Top among them are the inadequacy of infrastructure and the lack of skilled workforce.

What is your agenda for 2016?

We are developing our midscale presence with our Holiday Inn and Holiday Inn Express brands, which comprises more than 85 per cent of our development pipeline in India. Another trend is the rise of business travel which is now significant in travel and tourism in India. According to the Global Business Travel Association (GBTA), India has moved from the 24th spot in the world's business travel market ranking in 2,000 to 10th. There are opportunities to cater to this trend, and our answer to meeting it is our Crowne Plaza brand.



Shantha de Silva

“ Top among the key areas to be addressed are the inadequacy of infrastructure and the lack of skilled workforce ”





Madhav Bellamkonda

MADHAV BELLAMKONDA

General Manager

Novotel Visakhapatnam Varun Beach

How has the year 2015 been and what are your expectations from 2016?

2015 has been great for us as the market saw positive growth with a rise in occupancy levels and ADRs. The overall market has seen a 10 per cent growth in terms of occupancy. The bifurcation of the state has also led to increasing occupancy.

What were the highlights and challenges for your group in 2015?

2015 has been eventful for the group as a whole, with major developments taking place on all fronts leading to its fast paced

growth. The year has seen the addition of nine new hotels to AccorHotels' portfolio. These include the recently launched Novotel Imagica Khopoli and the Pullman and Novotel New Delhi Aerocity.

What is your agenda for 2016? What will be the challenges and developments?

For the upcoming year we are eyeing at increasing our ARR's and creating bespoke experiences for our guests at our hotel. The growing inflationary pressure might pose a serious challenge to the travel and hospitality industry as it may affect the disposable income in the hands of consumers thereby leading to less expenditure on travelling and holidays. The Goods and Services Tax bill (GST), as and when introduced, is expected to help the hospitality industry favourably.



The bifurcation of the state (Andhra Pradesh) has gone a long way in increasing occupancy levels



Rajeev Shandillya

RAJEEV SHANDILLYA

General Manager

Hotel Kanha Shyam

How has the year 2015 been and what are your expectations from 2016?

2015 turned out to be a steady year, but with limited growth, as inventory surplus is growing relatively higher. With the US\$ and Euro getting stronger, we expect more leisure movement next year. However, it would be RevPAR growth only for 2016. With the election next year, we may see a positive impact on tourism.

What is your agenda for 2016? What will be the challenges and developments?

We are bullish on inbound travel prospects for India. Backed by a stable socio-economic environment, India is seen as one of the

foremost destinations for international investment and there is a positive travel sentiment. We are hopeful that India will witness a positive growth, both in business and leisure inbound travel. With tangible support from the central government on strategic initiatives like the e-Tourist Visa facility, it is quite realistic to expect larger number of arrivals into the country.

The Indian tourism and hospitality industry has emerged as one of the key drivers of growth in the services sector in India. The third largest sub-segment of the services sector, comprising trade, repair services, hotels and restaurants, contributed nearly US\$ 187.9 billion or 12.5 per cent to the Gross Domestic Product (GDP) in 2014-15, while growing the fastest at 11.7 per cent Compound Annual Growth Rate (CAGR) over the period 2011-12 to 2014-15. Tourism in India has a significant potential considering the rich cultural and historical heritage, variety in ecology, terrains and places of natural beauty spread across the country. Tourism is also a potentially large employment generator besides being a significant source of foreign exchange for the country.



Hospitality and tourism, the third largest sub-segment of the services sector, is growing the fastest at 11.7 per cent CAGR over the period 2011-12 to 2014-15

