

The Landscape of Branded Residences in India-2024



Foreword

In the ever-evolving world of Indian real estate, the term "luxury" has often been overused, losing its true essence. Many developers attach this label to their projects, hoping to elevate their market positioning, yet few genuinely deliver on its promise. At CREDAI Youth Wing, we embarked on a journey to redefine what luxury truly means in today's real estate landscape. This report is a culmination of that exploration.

Our discussions revealed a fascinating insight: the hospitality industry profoundly shapes the concept of luxury. As individuals travel globally, their understanding of luxury evolves, influenced by the exquisite experiences offered by hotels and resorts. These benchmarks now define how we perceive luxury in our homes. From opulent bathrooms and serene bedrooms to grand lobbies and state-of-the-art gyms, residential spaces increasingly emulate the elegance and sophistication of luxury hotels.

Moreover, developers aiming for premium pricing often collaborate with esteemed hotel brands like Ritz-Carlton, Leela, and Four Seasons. These partnerships offer a branded living experience that leverages the unparalleled reputation of luxury hospitality.

To delve deeper into these trends, we partnered with Noesis, a leading consultancy, to conduct an in-depth analysis of the intersection between real estate and hospitality. I am thrilled to present this meticulously curated research to you, and I trust it will provide invaluable insights into the evolving definition of luxury in the real estate sector.

Sincerely,

Nithish Reddy

CYW CONVENER



The Indian real estate market is on the cusp of transformative growth, particularly in the branded residences sector. As urbanization accelerates and disposable incomes rise, the demand for luxury living spaces infused with global standards and local nuances is set to soar. Branded residences offer unparalleled value, combining high-end amenities with the reliability of established brands, thereby appealing to the discerning tastes of India's affluent buyers.

India's real estate landscape is evolving rapidly, with metropolitan cities like Mumbai, Delhi, and Bangalore leading the charge. These urban hubs are witnessing a surge in high-net-worth individuals seeking exclusive living environments that offer not only luxury but also a sense of community and security. The integration of branded residences in these cities is a testament to the growing sophistication of Indian buyers who value quality, prestige, and the assurance that comes with a trusted name.

In this report by Noesis, we delve into the dynamics of branded residences in India, exploring key trends, market drivers, and future opportunities. From the bustling urban centers to the serene countryside, India's diverse landscape presents a fertile ground for innovative real estate developments. The branded residences sector is poised to benefit from strategic investments and collaborations, driving growth and setting new benchmarks in luxury living.

As the sector matures, we anticipate significant investments and strategic collaborations that will redefine luxury living in India. This report aims to provide insights into the evolving preferences of Indian buyers and the transformative potential of branded residences in shaping the future of the Indian real estate market.

Happy Reading

Warm Regards,

Harshul Savla

CHAIRMAN-BUSINESS PROCESS OPTIMIZATION, CYW



Greetings,

The Indian luxury real estate sector is at a crossroads. Discerning buyers now crave opulence and a curated experience that reflects their aspirations. Branded residences, a unique offering, offer a compelling opportunity in this respect by merging the expertise of established hospitality brands with the construction prowess of leading developers. They serve as a strategic win-win for both parties, promising high returns on investment and a luxurious living experience for the buyers.

Indian households, known for their astute investment strategies, are increasingly focusing on the potential of the luxury real estate sector. With major brands making their foray into the luxury living market, India's ultra-wealthy population is on the brink of significantly expanding their real estate portfolios, presenting a promising landscape for growth and prosperity.

In a global context, the number of branded residence projects is increasing rapidly, with the Middle East region being a favoured location for brands and investors. North America and then Asia closely follow this lead. India already has 3% of the global market share of branded residences spread across cities like Mumbai, Delhi, Bengaluru and Hyderabad. Cities such as Chennai, Kolkata, Pune, and Goa are debuting this concept, and companies such as Marriott, Oberoi, and Wyndham are actively involved in projects in various strategic locations.

This report is not just a mere collection of data. It is a powerful strategic tool, a practical guide to navigating the dynamic landscape of branded residences in India for 2024. We delve into the market drivers propelling this growth, analyse the evolving consumer preferences, and identify the key players shaping the industry. These insights are designed to empower you, providing a clear path forward to drive your business to new heights in this evolving market.

It provides invaluable insights for real estate developers into understanding the brand landscape, identifying potential partners, and crafting residences that resonate with the target audience. Hotel operators will better understand the operational considerations, service standards, and guest experience expectations within branded residences.

Rest assured, this report is a comprehensive guide, leaving no stone unturned in covering current trends and the future potential of branded residences in India—a relatively young but promising market in the Branded Residences sector. By considering all the relevant aspects of the sector, you will be well-prepared to make strategic decisions, capitalise on emerging opportunities, and make a mark in this market.

We hope this report will help you navigate the world of Branded Residences. We look forward to connecting and working with you to drive this segment actively in the Indian market.

With warm regards,

Nandivardhan Jain

CHIEF EXECUTIVE OFFICER

nandivardhan.jain@noesis.co.in



India's Branded Residence Revolution: Where Luxury Meets Legacy

Welcome to the dawn of a new era in Indian real estate, where residences transform from mere dwellings to coveted addresses steeped in legacy. Branded residences are the crown jewels of this evolution, offering a lifestyle that transcends the ordinary.

Imagine a world where your home embodies the elegance of a renowned fashion house, a legendary hotelier's impeccable service, or a heritage brand's timeless allure. This is the promise of India's burgeoning branded residence market, fueled by a captivating interplay of economic strength, discerning tastes, and a desire for extraordinary living.

Winds of Change, Seas of Opportunity:

India's economic story is one of remarkable resilience and growth. The GDP has ballooned from USD 607 billion in 2003 to a staggering USD 3.75 trillion in 2023. This phenomenal trajectory, a burgeoning middle class, and substantial investments position India to become the world's third-largest economy by 2030.

The Rise of the Modern Maharajas:

This economic ascent coincides with a fascinating phenomenon - the rise of India's high-net-worth individuals (HNWIs) and ultra-high-net-worth individuals (UHNWIs). Mumbai, the continent's billionaire hub, boasts a collective wealth exceeding USD 445 billion, marking a staggering 47% increase year-on-year. With 271 billionaires, India is the world's third-wealthiest nation, holding over USD 1 trillion or 7% of global wealth.



A Discerning Eye for Luxury:

India's luxury residential market is experiencing a dynamic surge fueled by economic prosperity, urbanisation, and a growing appetite for finer things. Leading cities like Mumbai, Delhi, Pune, Bangalore, and Hyderabad lead the charge, while tier-2 cities witness a rise in affluence and demand. Technological advancements such as smart home integration, automation, and sustainability practices are becoming the new normal in this space.

Beyond Bricks & Mortar: The Allure of Branded Residences

Branded residences are not just about bricks and mortar; they are a philosophy of living. Imagine entering a world where your address is synonymous with impeccable service, unparalleled security, and curated experiences that reflect your refined taste. These residences leverage the prestige and heritage of established brands – think iconic hospitality chains or legendary fashion houses – to deliver a truly bespoke living experience.

The Alchemy of Growth:

Economic Boom & Wealth Creation: The rising tide of HNWIs and UHNWIs fuels demand for investments that align with their desire for an elevated lifestyle. Branded residences cater to this demographic, offering a compelling blend of luxury living and sound investment potential.

Evolving Aspirations:

Today's Indian consumer seeks a home that reflects their aspirations, fosters a sense of community, and boasts world-class amenities. Branded residences fulfil these desires by providing a coveted lifestyle with unparalleled convenience.

The Power of Brand Legacy:

Affiliation with a renowned brand offers buyers peace of mind. It guarantees consistent quality, meticulous maintenance, and exceptional service – especially valuable in a sometimes uncertain market.

Post-Pandemic Shift:

The pandemic has amplified the appeal of branded residences. The demand for private spaces, spacious living environments, and comprehensive in-house services has grown significantly. This "flight to quality" translates to a preference for established brands prioritising safety and reliability.

The Road Ahead: Embracing the Future

The Indian branded residence market is brimming with exciting trends. We see strategic partnerships between developers and international luxury brands, a growing focus on tier-1 and tier-2 cities, seamless integration of cutting-edge technology, and an emphasis on sustainability and wellness.

However, challenges remain. Regulatory hurdles, high costs, and the need for increased consumer awareness must be overcome. Nonetheless, the market's potential is undeniable. By tackling these challenges and proactively embracing emerging trends, we can ensure branded residences become a defining feature of India's real estate landscape, offering unparalleled living experiences to discerning buyers.

At Noesis, we are at the forefront of this exciting revolution, passionately connecting developers with the vision to create extraordinary branded residences. We invite you to explore this dynamic wave with us, unlocking its full potential and crafting a legacy that transcends generations.

Welcome to a New Era of Affluence

Indulge in the read, and we look forward to a continued conversation.

Warmly,

Vijay Bhandari

CHIEF OPERATING OFFICER

vijay.bhandari@noesis.co.in



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What are Branded Residences?



Branded residences are emerging as a game-changer in the real estate industry, offering a unique and innovative living experience.

Imagine a life where luxury and convenience seamlessly intertwine. Picture a residence that transcends the ordinary, offering a place to live and a curated lifestyle experience. This is the captivating world of branded residences, a niche segment blossoming in the heart of India's vibrant cities.

The underlying concept behind these products is relatively simple. A branded residence is typically a mixed-use project that builds residential apartments in conjunction with a traditional hotel. The entire project (hotel and residence included) is then branded and managed by a company, often a hotel operator.

Each branded residence unit is designed with a residential layout, with consideration for a kitchen, ensuite and/or shared bathroom spaces, living spaces and additional areas conditional on typographies and the category of project. The luxury status attributed to these projects implies lavishly designed units, with state-of-art fittings, offering an elevated living experience compared to unbranded counterparts.

There has been a significant growth in branded real estate products over the last three decades; research indicates that there are around 700 branded residence projects with 26,000 inventory units across the world.

India's flourishing branded residences offer a lifestyle experience unlike any other. The residence allows the luxury and service of a five-star accommodation to become your daily reality. Concierges handle your every need, while state-of-the-art gyms, infinity pools, and serene spas become extensions of your living space.

In addition to the the opulence that branded residences command, they also provide a communal bonding in their exclusivity; as world-class restaurants, designer shopping destinations and historical landmarks are a common feature amongst many of them.



Your trusted brand operator curates exclusive events and experiences, from private art viewings to wine tastings led by renowned experts.

Value Proposition in Branded Residences

The true value proposition, though, lies in the level of amenities and services offered by these residences. Each project will offer a set of 'core' services that are a part of annual service charges, and 'a-la-carte/on-demand' services which are optional and subject to additional charges when utilized. Some core services include clubhouse access (gym, swimming pool), 24/7 security, valet parking and hotel loyalty-program benefits. On-demand services include spa appointments, personal trainer sessions/programs and in-room dining. The final set of core and on-demand services do have variation across properties, particularly depending on the type of audience/market the project is catering to.



Types of Branded Residences

Historically Branded Residences primarily comprised of hotel-driven projects, where-in a segment of the property was dedicated to residential units for sale, integrated with the hotel amenities and carrying the hotel's brand. The progression in usage patterns, brand awareness and evolution of lifestyle preferences are key factors influencing consumers. In keeping with current trends and a growing dynamic demand, brands and companies from various industries like fashion, automobile and consumer goods are looking to capture a space in this domain to remain relevant.

TYPOGRAPHIES



Hotel led developments with integrated residences



Luxury resorts with residences used as holiday lets



Residential led developments with hotel adjacent



Residential developments with hotel management



Residential developments with remote hotel tie in



Departing from the traditional branded residence model, diversified iterations have risen across the world to suit demand in varying markets and locations. One type would be standalone residences, just the branded residence without the adjoining hotel. Non-hotel brands such as Trump Towers (Mumbai, Pune, Delhi & Kolkata) and Aston Martin (Miami), have projects aligning with this typology. Another type would be a Branded Residential development with a hotel that is adjacent such as Three Sixty West (Mumbai) and Raffles Residences (Boston). Hotel led developments with integrated residences will typically include the lower floors being run as a hotel whereas the upper floors will occupy the residential units for example Four Seasons (Mumbai) and Mandarin Oriental (New York). Luxury resorts like St. Regis (Miami) and St. Regis (Costa Mujeres) both include distinct residential units in their schemes.

Residential units with remote hotel tie-in are a relatively new concept that combines the benefits of homeownership with the end-user having access to amenities and services from a nearby hotel.

Deal Structure and Stakeholders Involved.

The deal structure in branded residences involves multiple parties – the developer, the brand/operator (often a hotel chain), sometimes a designer, and finally the purchaser/end-user.



Developer

- Is responsible for financing, construction, and marketing of the residences.
- Negotiates agreements with the brand/operator and designer. The developer can also be a consortium of Land owner and/or investor.

Brand/ Operator (Hotel Chain)

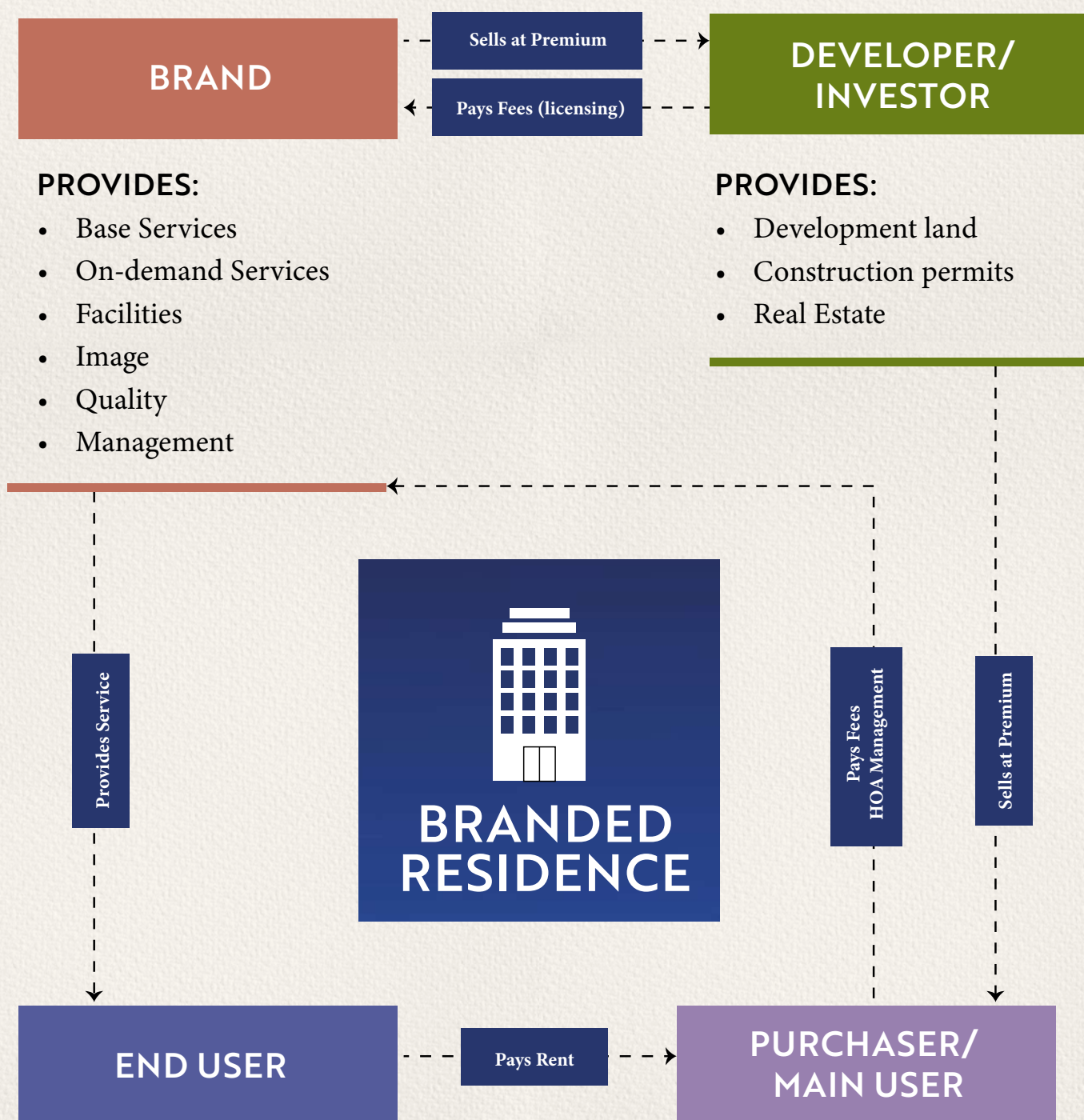
- Licenses their brand name and potentially their design standards to the project also providing technical service to the end users.
- May offer operational expertise in areas like property management, resident services, or even rental programs (depending on the agreement) in case of a hotel operating brand.
- Receives a brand licensing fee from the developer, typically a percentage of the total sales value or a fixed fee per unit.

Designers

- Designers meticulously translate the brand's core values, aesthetics, and signature style into the architecture, interior and/or exterior design, and overall environment of the residence.

Purchaser/ Unit Owners or End User:

- Units can be sold as a long-term living space similar to any traditional apartment or residential property. Owning a branded residence is associated with luxury, exclusivity, and a connection to a well-regarded brand. It signifies a certain level of taste and success. Branded residences are meticulously designed and built to uphold the brand's standards. The End User can expect high-quality materials, finishes, and attention to detail.

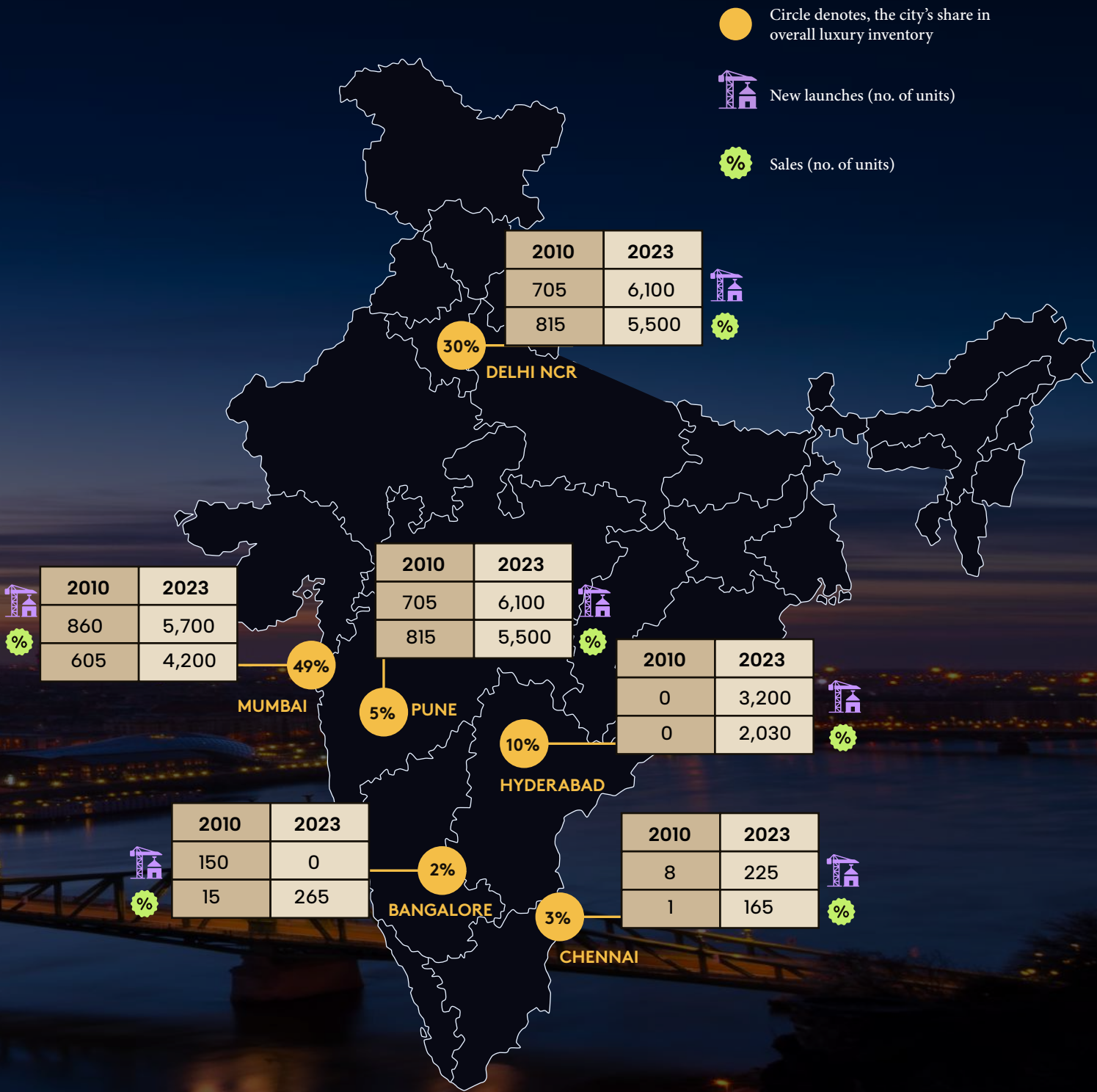


Branded Residences:

India's Emerging Luxury Real Estate Segment



City-Wise Luxury Hotspots in India. Indicating new launches and sales of luxury, non branded, real estate units



India's Luxury Residential Real Estate Hotspots

Mumbai holds a dominant share of nearly 49% of the luxury real estate projects, whereas Delhi comes in 2nd at 30%. The average ticket size in Mumbai for these projects can range from Rs. 20 to 65+ Crore also apartments being sold for Rs. 100 Crore

or more can be found making headlines.

Similar to Mumbai, the luxury housings in Delhi are located in the southern part of the city with average ticket size ranging from Rs. 45 to 60+ Crore.

CITIES

MUMBAI

Key luxury residential projects

Nepean Sea Road, Altamount Road, Colaba, Bridge Candy, Worli, Bandra, Juhu, Powai.

DELHI-NCR

Amrita Shergil Marg, Prithviraj Road, Golf Links, Sunder Nagar, Golf Course Road, Sector 55 & 56.

BANGALORE

Vittal Malya Road, Kensington Road (Ulsoor), Richmond Town, Cunningham Road, Mekhri Circle, Koramangala, Whitefield, Rajaji Nagar, Bellary Road.

HYDERABAD

Jubilee Hills, Banjara Hills, Hitech City, Raidurg, Neopolis(Few pockets of Kokapet), Nanakramguda, Gachibowli.

CHENNAI

MRC Nagar, R.A. Puram, Mandaveli, Alwarpet.

PUNE

Koregaon Park, Boat Club Road, Kalyani Nagar.

KOLKATA

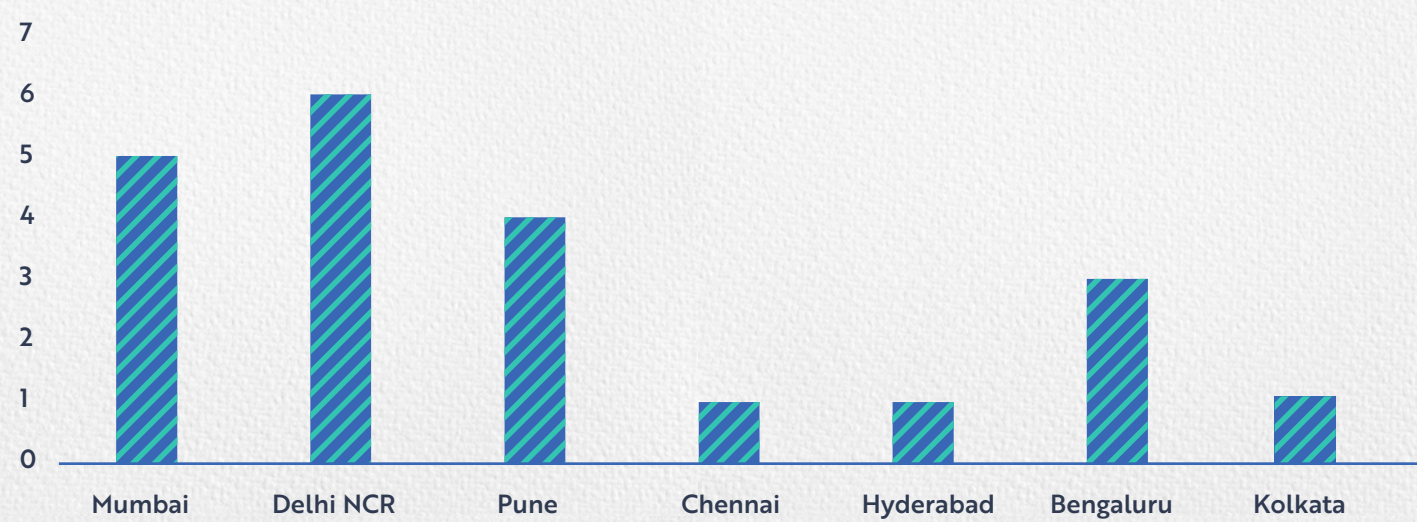
Park Street, Theatre Road, Elgin Road, Loudon/Rawdon street, Landsdowne, Alipore, Judges Court Road, Salt Lake, New Town.

This is an indicative list and not an exhaustive list

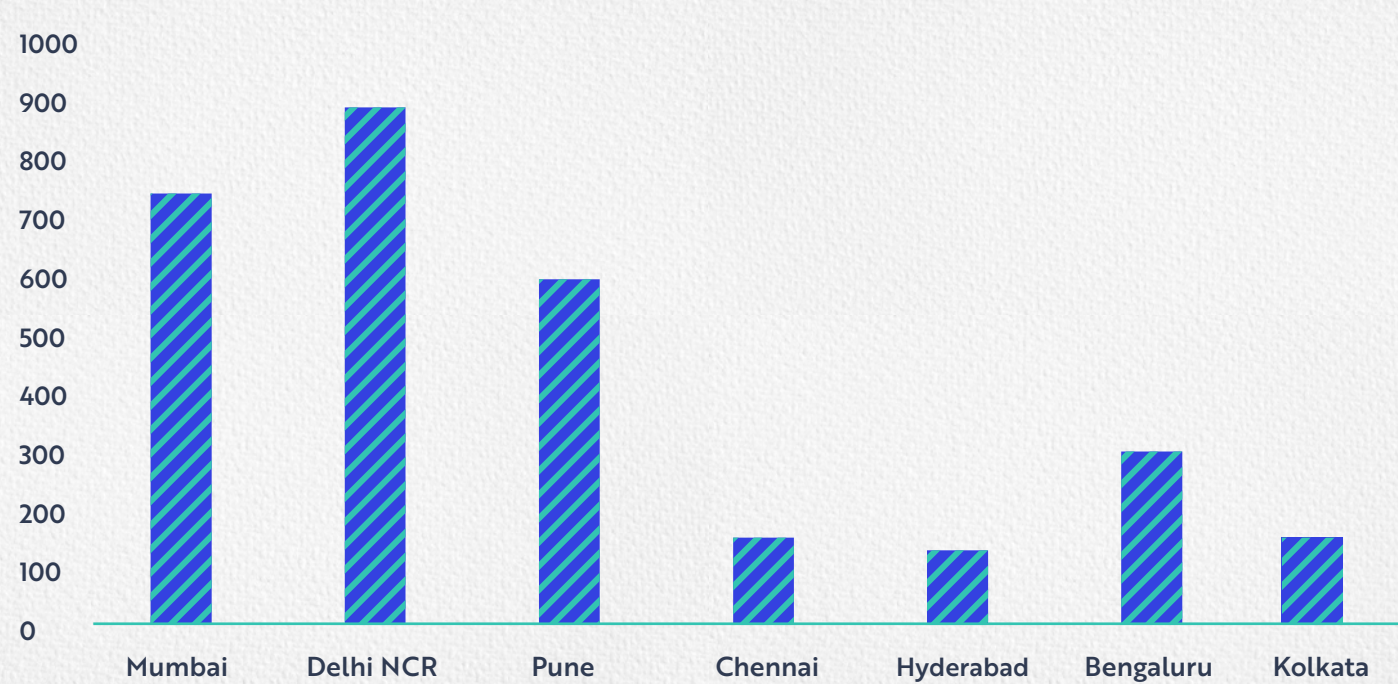
Southern India isn't far behind. Hyderabad's booming tech scene fuels a 10% luxury market share, with Jubilee Hills offering properties exceeding INR 40 crore. Pune (5%), Bangalore (3%), and Chennai (2%) have a smaller presence, with luxury properties scattered across key locations.

Branded Residence Presence Across Indian Cities

Branded Residences Schemes Across Indian Cities



Total Operational & Planned Branded Residence Units Across India



Branded Residences:

Going for Growth 2024

The Luxury Lifestyle segment in India is expanding with the increase in disposable income, growth in the wealthy class and appetite for upgraded experiences. As a wealthy class expands, their desire for upgraded experiences is fueling the rise of branded residences. This unique market concept merges the experience of renowned hospitality brands with the top-tier construction expertise of leading developers. **With 2,900 operational branded residence units (According to NOESIS Research)** currently capturing close to **3% of the global market share**, India presents a compelling opportunity for a diverse set of stakeholders to enter this market.



Fueling the rise:

AFFLUENT CONSUMER BASE:

India's economic growth has fostered a significant population with high disposable incomes. A report by Knight Frank forecasts a **63% increase in India's Ultra-High Net Worth Individuals (UHNWI)** by 2025, creating a strong demand for luxury living options.

ASPIRATIONAL LIVING:

Branded residences cater to the desire for a curated lifestyle experience. Residents gain access to **unparalleled amenities** like concierge services, spas, fitness centers, fine dining, and exclusive resident-only events.

IMPECCABLE SERVICE:

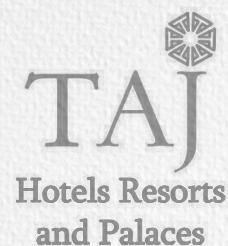
Residents receive the same meticulous attention to detail and personalized service standards as hotel guests, ensuring a **hassle-free** living environment.

BRAND PRESTIGE:

Owning a branded residence offers the prestige and cachet of being associated with a globally recognized brand, enhancing the overall value proposition.

Brand Presence in India in the Branded Residences Segment

HOTEL BRANDS



NON-HOTEL BRANDS



Hotel and Non-Hotel Brands



Hotel Brands

ESTABLISHED REPUTATION:

Hotel brands have a well-defined image and existing customer base, making it easier to attract buyers.

PROVEN MANAGEMENT EXPERTISE:

Hotel brands have extensive experience in managing hospitality services, which can be beneficial for residents.

LIMITED DESIGN CREATIVITY:

Hotel brands may have stricter design guidelines, potentially limiting architectural and design innovation.

NON-Hotel Brands

UNIQUE DESIGN AND LIFESTYLE:

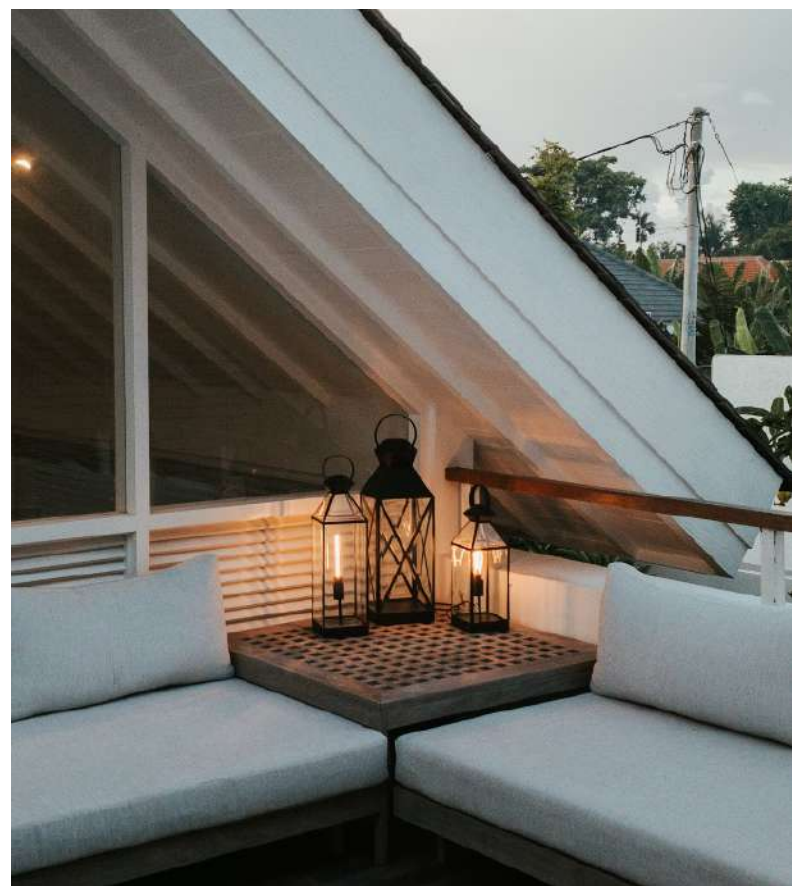
Non-hotel brands can offer a more unique and differentiated design aesthetics and lifestyle experiences.

FLEXIBILITY IN AMENITIES:

Amenities can be tailored to a specific target market and needs of its residents, potentially going beyond traditional hotel offerings.

MANAGEMENT EXPERTISE:

Developers may need to find alternative partners for managing resident services if the non-hotel brand lacks experience.



The background of the page features a light blue gradient. Overlaid on this are several upward-pointing arrows of varying sizes and colors. A large, central, light yellow arrow points upwards. Surrounding it are several smaller, semi-transparent blue arrows, also pointing upwards, creating a sense of growth and progress.

Branded Residences:

Going for Growth 2024



MARKET SIZE AND TRAJECTORY:

India's branded residence market is expected to witness significant growth in the coming years. Research suggests that globally, the branded residence market is growing at a **Compounded Annual Growth Rate (CAGR) of 12%**. The same is likely for India given its emergence as a prime location for these exclusive living experiences.



DIVERSIFICATION OF PLAYERS:

The growing appetite and diverse taste of potential investors or buyers has led to a diversification of players to help capture the variety of market demand. While established names like Four Seasons and the Leela command a sizeable space in the branded residence market, new players like Versace and Yoo are also catering to different clientele looking for a similar experience. Real estate giants like Lodha Group and Panchshil Realty are partnering with hospitality brands to leverage their expertise.



PRODUCT INNOVATION:

The evolution of the concept to move beyond traditional iterations encourages developers to explore standalone residences, branded villas, and mixed-use developments to cater to diverse buyer preferences.

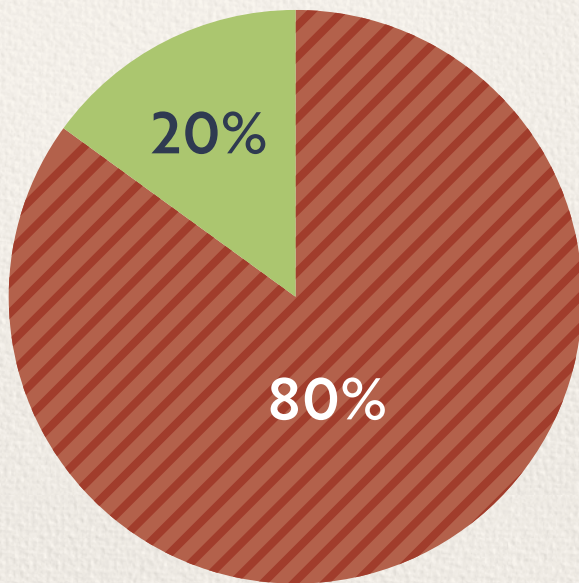


LOCATION FOCUS:

Major metro cities indicate an established appetite for luxury lifestyle. Mumbai, Delhi-NCR and Bengaluru are witnessing a surge in branded residences. However, emerging cities like Surat, Ahmedabad, Jaipur, Chandigarh and Indore show a promise of infrastructure, development, FDI and commercial growth that will also satiate the appetite for investors to own a branded residence in the area. Pune, Chennai and Goa are attracting interest from developers and investors.

Share of Schemes Under Hotel vs Non-Hotel Brands

The figures annexed indicate the share of branded residence schemes globally and in India as of 2023. In India the Non-Hotel brands have the largest share in number of schemes.

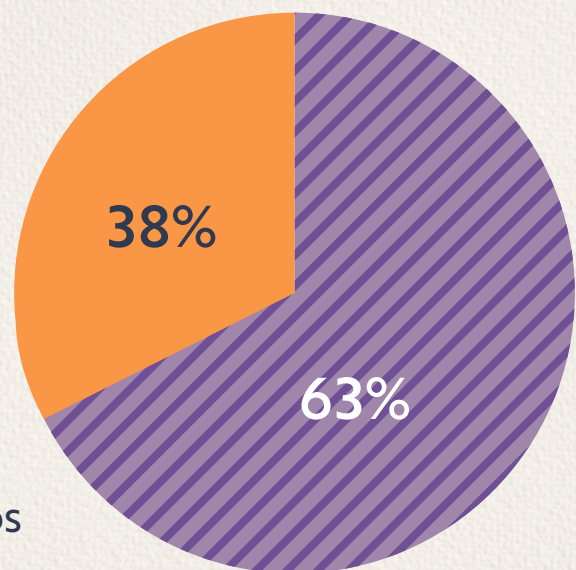


Global Share of Schemes - Hotel vs Non-Hotel

HOTEL BRANDS NON-HOTEL BRANDS

Indian Share of Schemes - Hotel vs Non-Hotel














HOTEL BRANDS NON-HOTEL BRANDS



Rising Affluence In India 2024

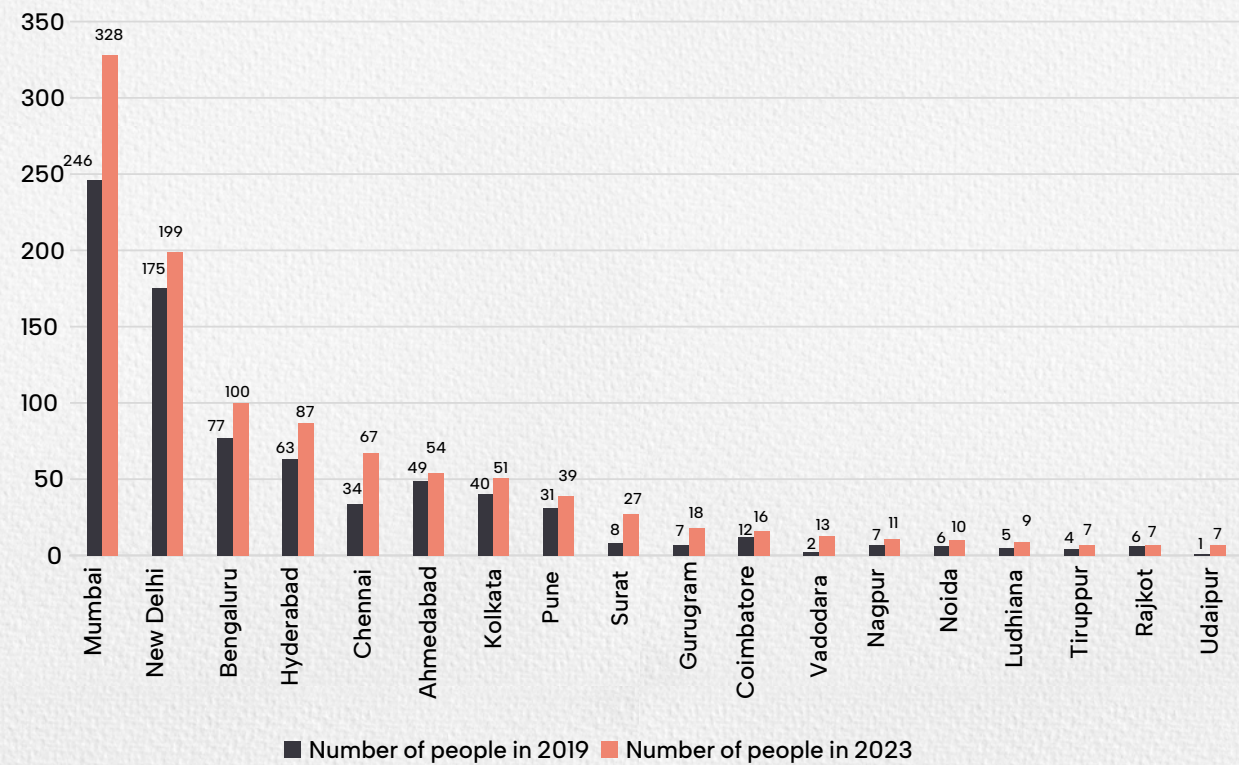
In 2023, India had 1,319 individuals with a combined wealth of over INR 1,000 crore. This was an increase of 27% on a year-over-year basis and a CAGR growth of 75% over the last five years. While the highest number of these individuals live in cities such as Mumbai and Delhi NCR, cities such as Surat have witnessed a growth in the number of such individuals by nearly 238% when compared to 2019.

Luxury car sales in India scaled a record high of 42,731 units in 2023, up 20% year-on-year. Carmakers attributed the pickup in sales to a lifestyle change after Covid-19, making many younger professionals opt for high-end cars, and said the trend is expected to continue, citing rising disposable income levels.

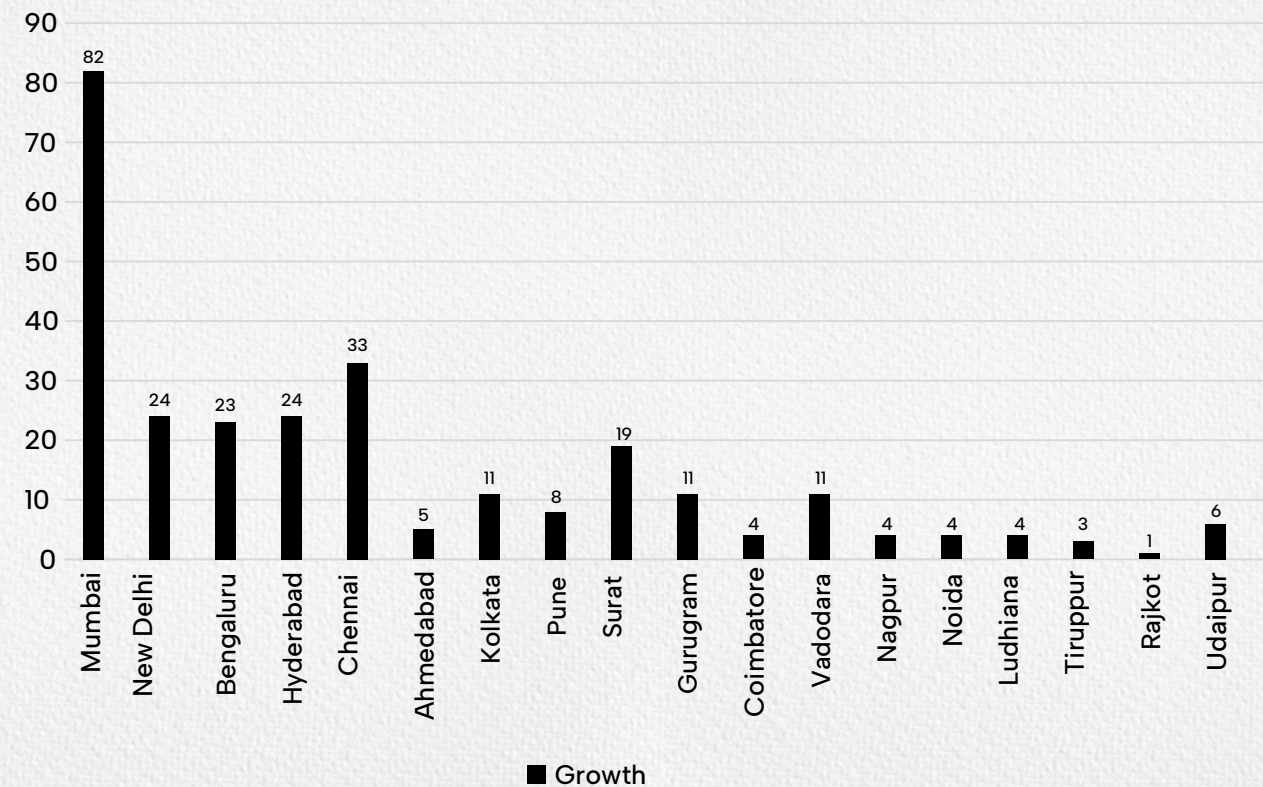
AUTOMOBILE BRANDS	PRICE RANGE IN INR. CRORE
	0.45 - 2.60
	0.44 - 2.22
	0.44 - 3.30
	0.68 - 4.47
	0.73 - 1.56
	3.50 - 6.24
	3.22 - 8.89
	0.88 - 4.26
	0.55 - 1.01
	5.00 - 8.84
	6.95 - 10.48
	0.63 - 2.84
	1.20 - 1.99

Rising Affluence In India 2024

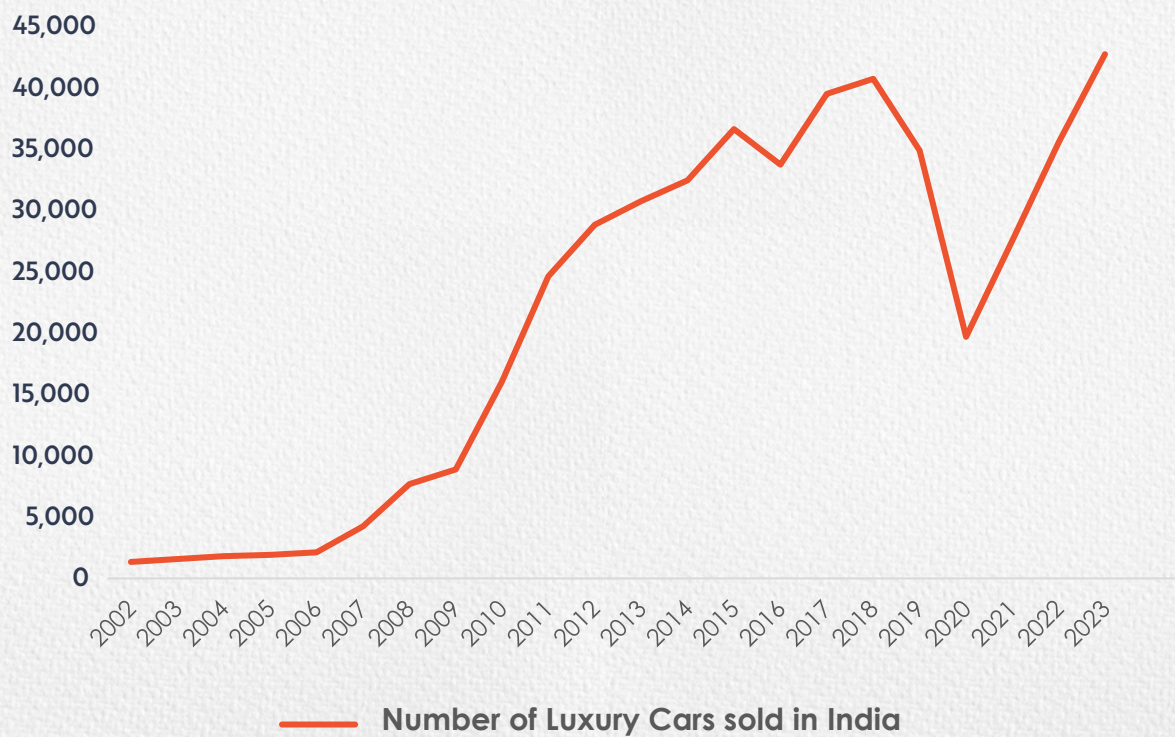
Number of Individuals who have a Net Worth of INR 1000 + Crore (120 million USD)



Growth in Number of Individuals who have a Net Worth of INR 1000 + Crore (120 million USD)



Number of Luxury Cars sold in India



Branded Residences Hotspots

TIER 1 CITIES



AFFLUENT POPULATION:

Mumbai has emerged as India's wealthiest city housing 58,400 millionaires.

MARKET PRESENCE:

There are four branded residence projects, with a few others in the pipeline. Three of the projects are located in Worli and one project is in Girgaon Chowpatty. International hotel operators Four Seasons and Ritz-Carlton each have a presence in the financial capital of the country.



LUXURY MARKET:

Delhi holds the second-highest concentration of 30,700 millionaires.

ESTABLISHED PLAYERS:

A well-established market with branded residences from The Leela, Trump Towers, Trident Residences, and others. Delhi NCR holds 6 branded residence projects under its belt.



TECH SAVVY CLIENTELE:

Bengaluru, with its thriving tech industry is home to 13,200 millionaires. It has witnessed a surge in demand for luxury apartments, with branded residences catering to this segment.

MARKET LEADERS:

Prestige Golfshire, Four Seasons Private Residences and The Leela Residences have an established presence in the city.



STRONG INFRASTRUCTURE DEVELOPMENT:

The development of the Outer Ring Road and overall infrastructure improvements enhance connectivity and create a more attractive environment for residents, including those seeking branded residences.

MARKET ENTRANTS:

Yoo along with developer MySpace Realty have successfully made an entry into the branded residences space in Hyderabad with the launch of Yoo Hyderabad.

Branded Residences Hotspots

EMERGING MARKETS



FASTEST GROWING MARKET:

Pune's branded residence market has witnessed impressive growth in recent years, attracting a young and affluent population.

PIONEERING DEVELOPER:

Panchshil Realty has been a key developer in Pune with 3 branded residence projects under its umbrella i.e. YooPune Residences and YOO Villas and Trump Towers.



GROWING AFFLUENCE:

Chennai's rising disposable incomes are attracting developers to cater to a growing demand for luxury living options.

RECENT LAUNCH:

Ampa Hi-Life which is developed by the Ampa Group and branded by Taj Hotels launched in 2023, marks a significant entry into the branded residence market for the city.



EXISTING LUXURY MARKET:

Kolkata already boasts a luxury real estate market with established players. Projects such as 'The 42' and 'Forum Atmosphere' could provide an existing infrastructure to provide a strong foundation for branded residences to flourish.

RECENT LAUNCH:

Trump Towers Kolkata located near the EM Bypass in Kolkata saw 50% of its units sold within 40 days of the soft launch.



LUXURY SECOND HOMES:

Goa, is popular as a leisure destination and attracts investors seeking branded residences as second homes or investment opportunities.

INVESTMENT POTENTIAL:

The potential for rental income and property value appreciation makes Goa an attractive investment option for real estate developers and buyers.

Case Study – A



Trump Towers, Mumbai

Developer: Lodha

Operator/Brand: Trump

Units: 390

Size: 17 Acres

Configurations: 3 BHK and 4 BHK

Trump Towers, Mumbai

PROJECT NAME & LOCATION:

Trump Towers, Worli,
Mumbai

**PROJECT DESIGNER/
ARCHITECT:**

HKS Designer & Consultant
International

DEVELOPER:

Lodha

**KEY FEATURES AND
AMENITIES:**

Putting Green, Swimming
Pool, Gymnasium, Restaurant

Trump Tower Mumbai is a prime example of a branded residence in India. Located in the affluent Worli district, it boasts a dazzling golden curtain-wall façade and soars 78 stories high, offering stunning views of the Arabian Sea and the Mumbai skyline. Developed by Lodha Developers and branded by The Trump Organization, it represents a collaboration of luxury living and internationally recognized prestige.

Overall, Trump Tower Mumbai represents a significant development in India's branded residence market. It caters to a niche segment of affluent buyers seeking a luxurious lifestyle experience with the cachet of an internationally recognized brand.



Case Study – B



*Four Seasons
Private Residences,
Bengaluru*

Developer: Embassy Group

Operator/Brand: Four Seasons

Units: 109

Size: 33 Acres

Configurations: 2, 3, 4 and 5 BHK

Four Seasons Private Residences, Bengaluru

PROJECT NAME & LOCATION:

Embassy One, Four Seasons, Bengaluru

PROJECT DESIGNER/ ARCHITECT:

HKS Designer & Consultant
International

DEVELOPER:

Embassy One

KEY FEATURES AND AMENITIES:

Swimming Pool, Bar and Restaurant

Embassy ONE is the emergence of an elevated, integrated lifestyle, it seamlessly combines the legendary Four Seasons hospitality and bespoke private residences with luxury shopping, gourmet dining and corporate office spaces.

Spread across two immaculately designed 30 storey towers, the residences unfold a canvas for inspiring, effortless living with signature Four Seasons service.



Case Study – C



Ampa Hi-Life Chennai

Developer: Ampa Group

Operator/Brand: Taj

Units: 123

Size: 12 Acres

Configurations: 3 BHK and 4 BHK

Ampa Hi-Life Chennai

PROJECT NAME & LOCATION:

Ampa Hi-Life Chennai

**PROJECT DESIGNER/
ARCHITECT:**

Bharati Meraki

DEVELOPER:

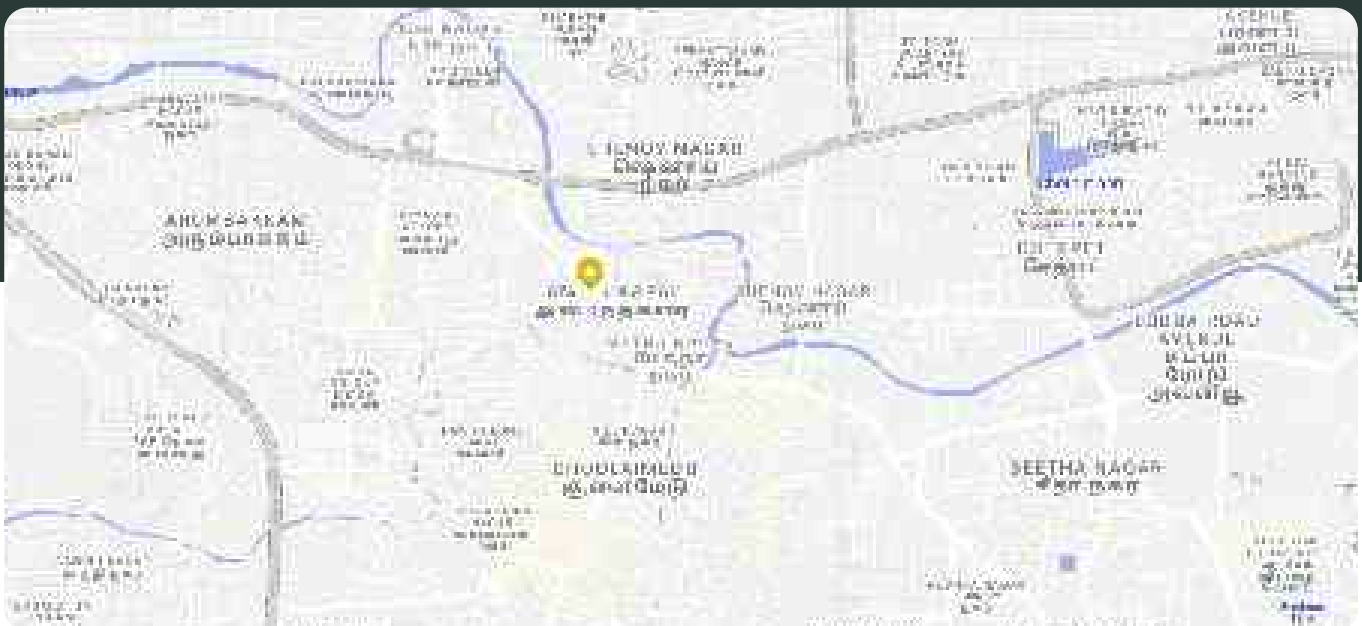
Ampa Group

**KEY FEATURES AND
AMENITIES:**

Gym, Swimming Pool, Yoga
Pavillion

The project is a collaboration between the Ampa Group and the Taj Group, and it will be the first Taj branded residences in the world.

The project offers a variety of luxurious amenities to its residents, including a spa, a gym, a theater, a swimming pool, and a clubhouse. The project also has a multi-level security system to ensure the safety of its residents.



Case Study – D



Trump Towers, Gurugram

Developer: Tribeca Developers and
M3M India

Operator/Brand: Trump

Units: 250

Project Size: 22 Acres

Configurations: 3 BHK and 4 BHK

Trump Towers, Gurugram

PROJECT NAME & LOCATION:

Trump Tower Delhi NCR

**PROJECT DESIGNER/
ARCHITECT:**

Morphogenesis

DEVELOPER:

Tribeca and M3M Developers

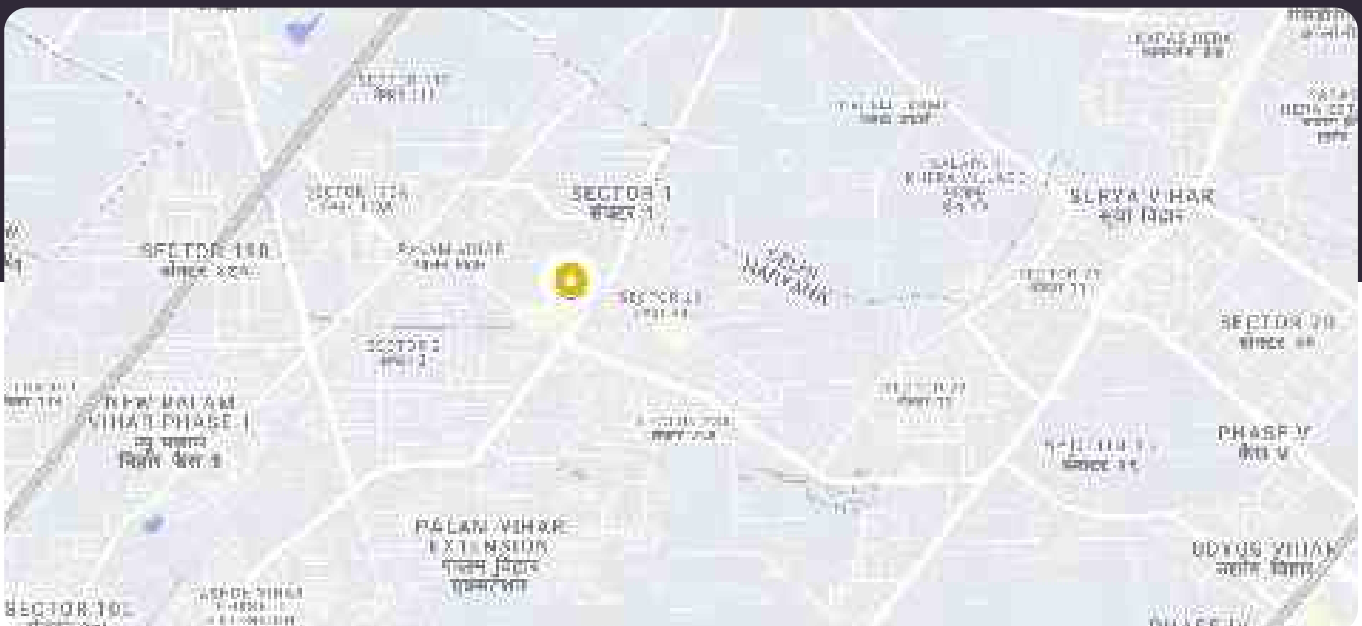
**KEY FEATURES AND
AMENITIES:**

Gym, Swimming Pool, Yoga
Pavillion

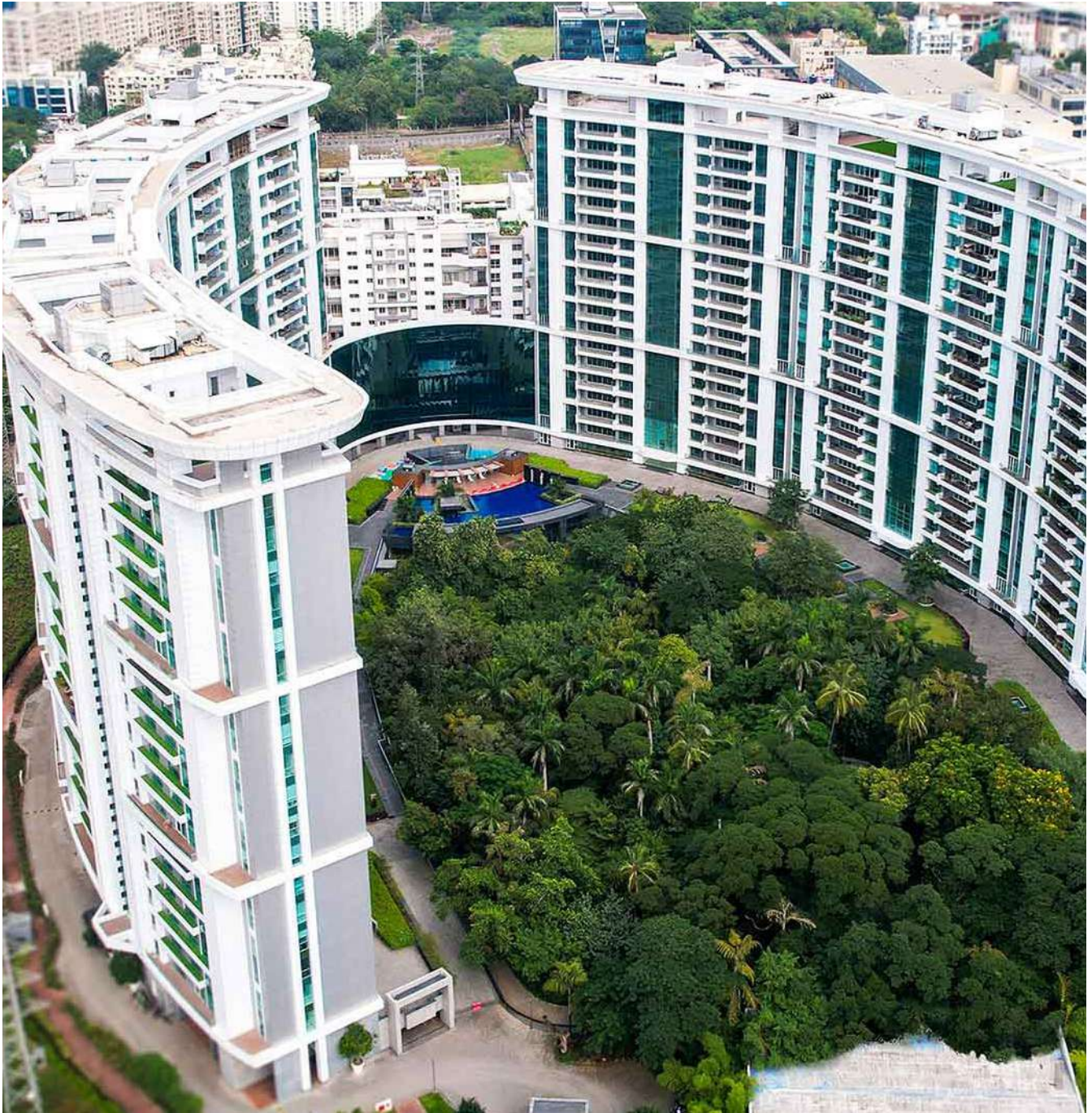
Trump Tower in Gurgaon is a residential project by Tribeca Creators LLP. This posh high-rise comprises spacious 3 BHK and 4 BHK ultra luxury apartments that are located in Sector 65, Gurgaon.

The Trump Towers in Delhi NCR is a well-known address that is home to some of the city's most influential people. At the Trump Towers the airy, double-height living room offers sweeping views over the full arc of the city's skyline.

The Trump Club, a personal utopia at your own backyard is the array of venues for entertainment, fitness and relaxation.



Case Study – E



yoopune

Developer: Panchshil Reality

Operator/Brand: YOO

Units: 228

Size: 18 Acres

Configurations: 4 BHK and 5 BHK

yoopune, by Panchshil Reality

PROJECT NAME & LOCATION:

yoopune By Panchshil Reality

YOO is a global brand of real estate place-makers, developers and designers.

PROJECT DESIGNER/ ARCHITECT:

YOO

YOO have evolved into the world's largest non-hotel residential brand with 52 projects completed worldwide and 30+ under development.

DEVELOPER:

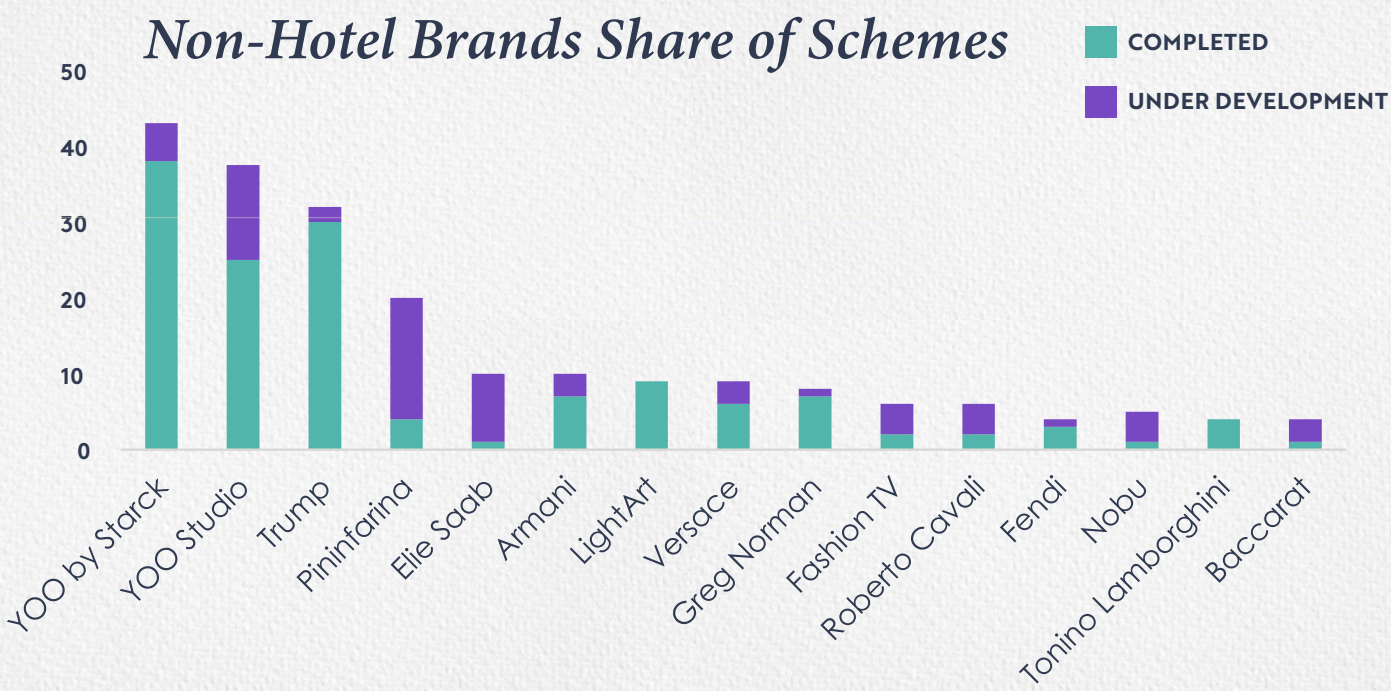
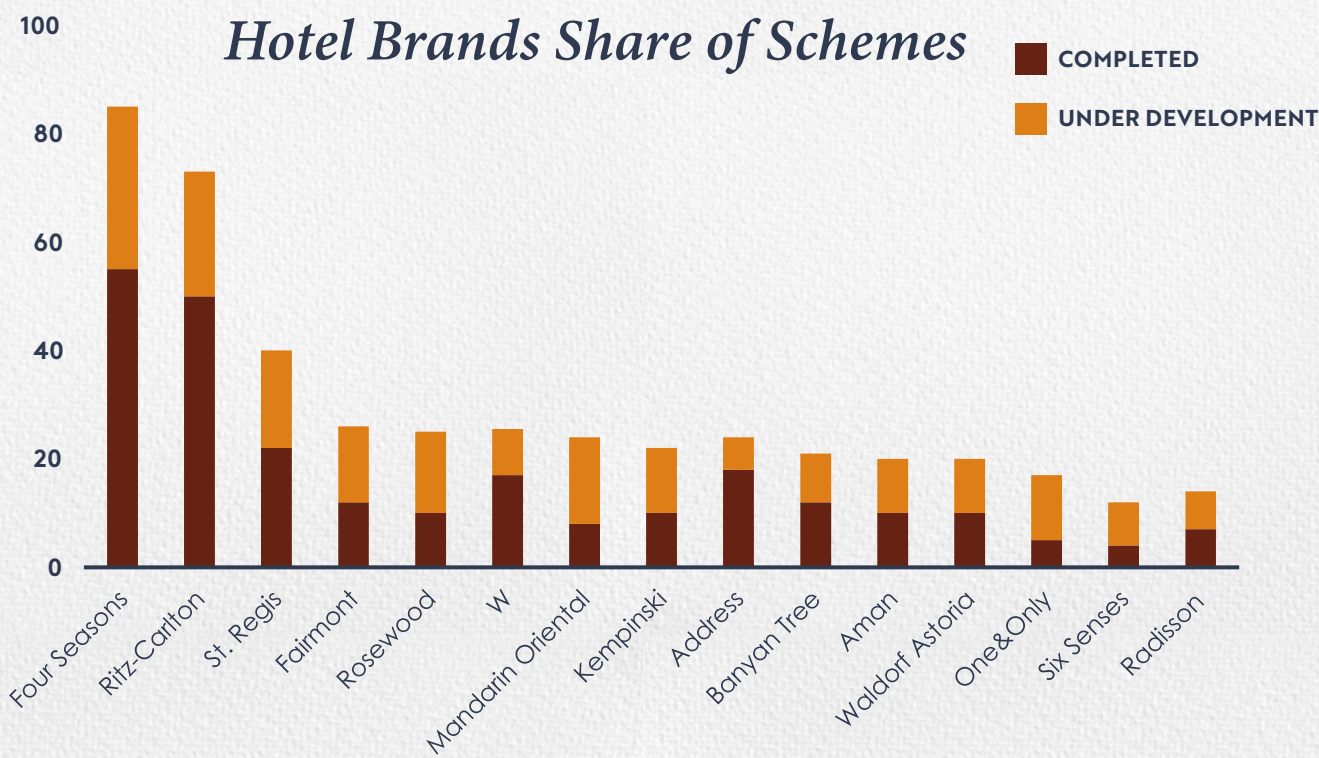
Panchshil Reality

yoopune is India's first ready-to-move-in YOO branded residence set within an expanse of 13 acres and offers a designer-led living Built around 5 acres of lush green dense landscape, these residences provide a life that is centered in nature, rooted in luxury.

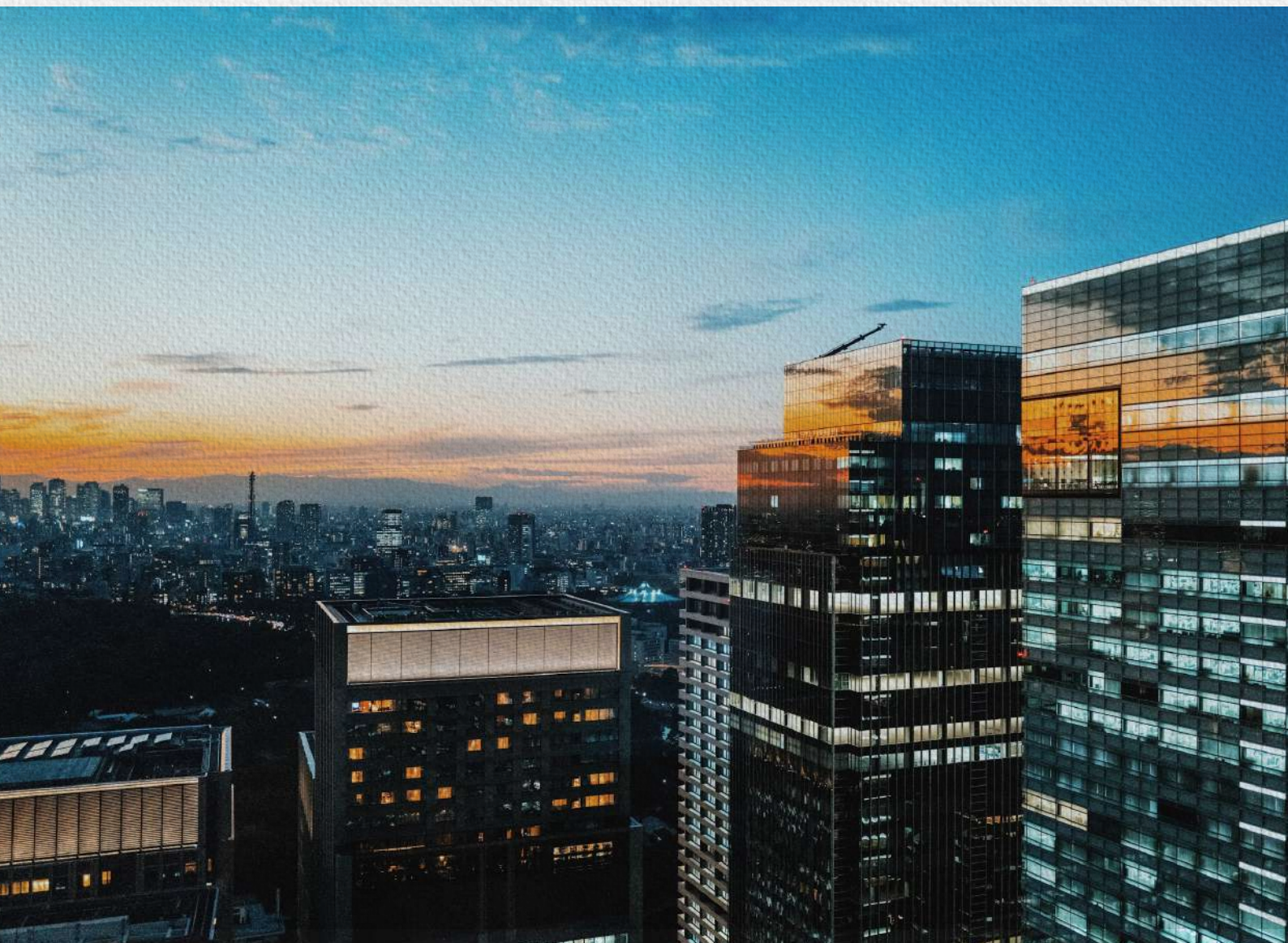
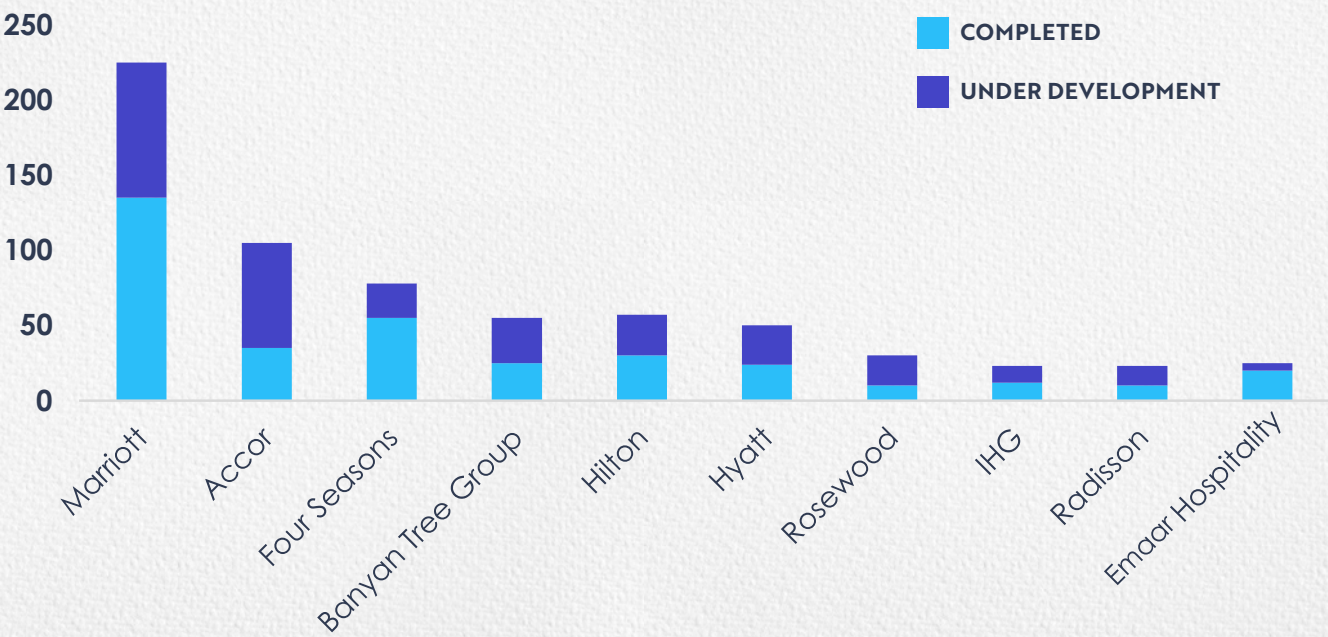
yoopune, Philippe Starck's flagship project in India, is a mix of 4 & 5 BHK apartments & penthouses. The 228 designer residences in 6 sprawling towers is an ode to international living.



Current Global Project Schemes in Branded Residences



Top 10 Hotel Parent Companies



Branded Residence Market Analysis– Global

- 105,000 Branded Residence Units across 750 projects worldwide.
- Over 1,200 schemes forecast by 2027.
- Hotel Brands Dominate with a share of 80% of the projects.
- Marriott is the largest operator, followed by Accor. YOO is the leading non-hospitality brand.
- Non-Hospitality Brands Account for 20% of the projects worldwide.
- **Dubai** is the world's **leading** hotspot for **branded residences** followed by South Florida, New York, Phuket, and London.

Branded Residence Surge – India

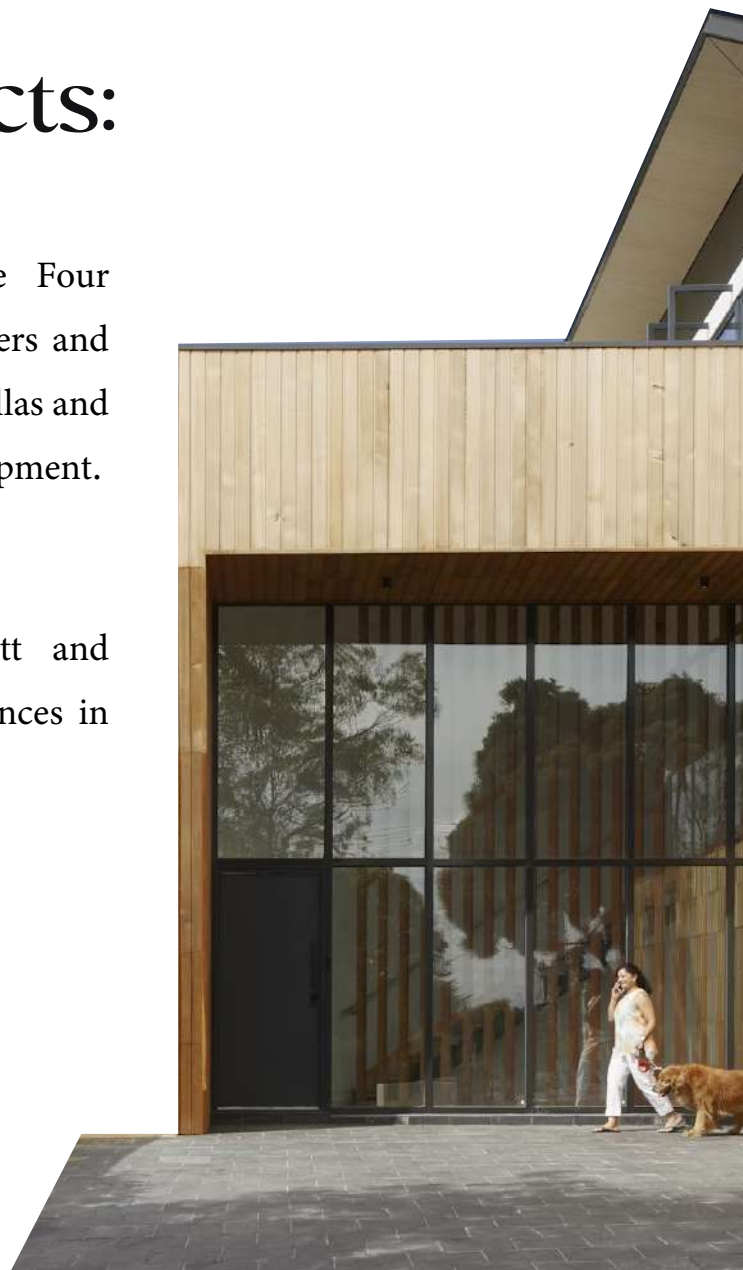
Surge in Indian Residence Projects:

ESTABLISHED PLAYERS:

Several completed projects exist, like Four Seasons Private Residences, Trump Towers and yoopune. Other projects like Leela Sky Villas and Unity Amaryllis Versace are under development.

EXPANDING MARKET:

Major hospitality chains like Marriott and Wyndham are exploring branded residences in metros and tourist destinations.



What to Expect:

DIVERSIFICATION:

Look beyond just hotels – luxury car brands, fashion houses and even renowned designers might join the branded residences space in India with some already having done so.

TIER-2 GROWTH:

While metros lead the way, expect branded residences to surge in tier-2 cities like Surat and Indore, catering to a broader audience.



Pipeline Trends - Global

The branded residences sector has historically been led by schemes from luxury hotel developers, but as the sector continues to grow and diversify other brands and chain scales are capturing increasing market share. In the year 2023, there were nearly 250 projects in North America, around 150 in Asia-Pacific, approximately 90 in Latin America, 110 in Europe, 70 in the Middle East and North Africa, and around 10 in Africa. Globally there are around 750 Branded Residences projects. A pipeline of Branded residences will take this figure to nearly 1,200 by 2030. Brands are now moving towards emerging markets to capitalize on rapid economic growth and rising demand by the affluent population.





Since branded residences have been an asset class reserved primarily for the global high net-worth population, there have been a few things which have been absolutely critical for buyers. Services and amenities such as the concierge, fitness centers, restaurants & bars, and housekeeping remain key, but there are new elements which have become integral for today's buyers. Wellness and experiential amenities have risen in importance, especially postpandemic.

These amenities and focus on the lifestyle of branded residence owners are a key part of the new generation of lifestyle and leisure hospitality brands in the pipeline. Buyers are also increasingly interested in sustainable schemes and schemes with both indoor and outdoor space. These changes represent more of a shift towards the desire for living spaces and amenities that suit the lifestyles of an increasingly discerning set of buyers.

Trends in Branded Residences – Global

In terms of the brands operating the sector, the global space is largely captured by hotel brands, which accounted for nearly 80% of completed schemes. Four Seasons tops the list with over 80 total projects. The Ritz-Carlton comes in as a close second, with nearly 80 schemes of their own, followed by St. Regis and Fairmont.

Speaking in terms of hotel **parent companies**, Marriott emerges as the world leader, single-handedly commanding over 200 projects under their belt. Despite the French trailblazer Accor placing second, their total projects sum up to just over 125.

Branded residences come at a premium compared to traditional luxury apartments. Studies suggest an average ticket size between ₹9 crore (US\$1.08 million) and ₹10 crore (US\$1.2 million) for a branded residence. Existing projects in prime locations like Mumbai can range from ₹70,000 (US\$840) to ₹1,45,000 (US\$1,198) per square foot.

Trends in Branded Residences – Global Non-Hotel Players

<i>Architect /Interior</i>	<i>Automobile</i>	<i>Fashion</i>	<i>Developer</i>	<i>Restaurants</i>
Yoo	Lamborghini	Ellie Saab	Trump	Mr C
Pinafarina	Aston Martini	Armani	Candy & Candy	HardRock
LightArt	Buggatti	Versace	Related	Casa Tua
Greg Norman	Porsche	Fashion TV	Berkeley Group	Major Food Group
Philippe Starck		Roberto Cavalli	Emaar and Aldar	Nobu
Kelly Hoppen		Fendi		
1508		Baccarat		
Yabu		Bulgari		
HBA		Fendi		
Tristan Aeur		Missoni		
Yves Rochon		Ferre		
Goddard Littlefair		Diesel		
Cesar Pelli		Dolce and Gabbana		
Frank Gehry				
Daniel Libeskind				
Renzo Piano				
Norman Foster				
Moshe Safdie				
Jen Michel				
Zaha Hadid				

Trends in Branded Residences – India

- As the sector continues to grow, the locations where branded residential schemes can be found are growing too.
- Delhi is home to the largest number of Branded Residence Units with a supply of around 915 which also includes two projects that are in pipeline. Followed by Mumbai and Pune which is home to 666 and 684 units respectively.
- Major International Hotel Brands like Four Seasons and Marriott have already marked their footprint into the Branded residences landscape of India. With domestic brands like Taj and Leela also taking a step forward in this direction with projects in Chennai, Bengaluru and Delhi NCR region.
- Trident Residences by the Oberoi Group has ventured into this space with their recent collaboration with BI Group.
- Fashion Brand Versace has entered into the Indian Branded Residences market in collaboration with the Unity Group
- The Market Value of Branded Residences Across India is estimated to be around Rs. 69,561 Crores with an average carpet area of 4,988 sq. Ft.

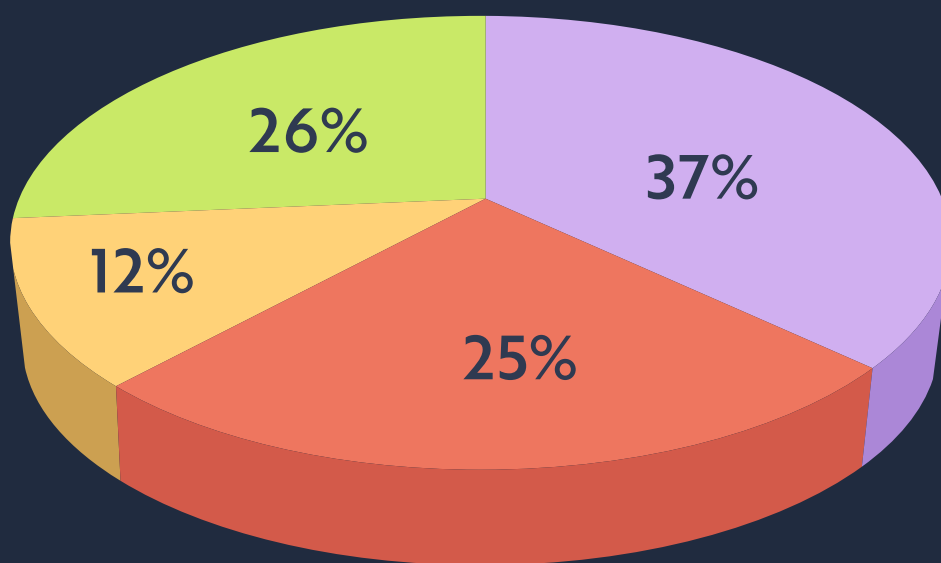




Non-Hotel Branded Residences - Global

The prospect of the branded residence sector has attracted many players even outside the hotel industry. Many luxury consumer brands have taken up the challenge to contest with established hospitality players in this segment. The Top 15 Non-Hotel brands that have made a mark in the branded residences segment at the global level include the following. There are 4 basic categories of Non-Hotel Brands these are Developers, Architect/Interior Designers, Automobile and Fashion. The largest share of schemes are under the developers category.

Share of Non-Hotel Brands By Category



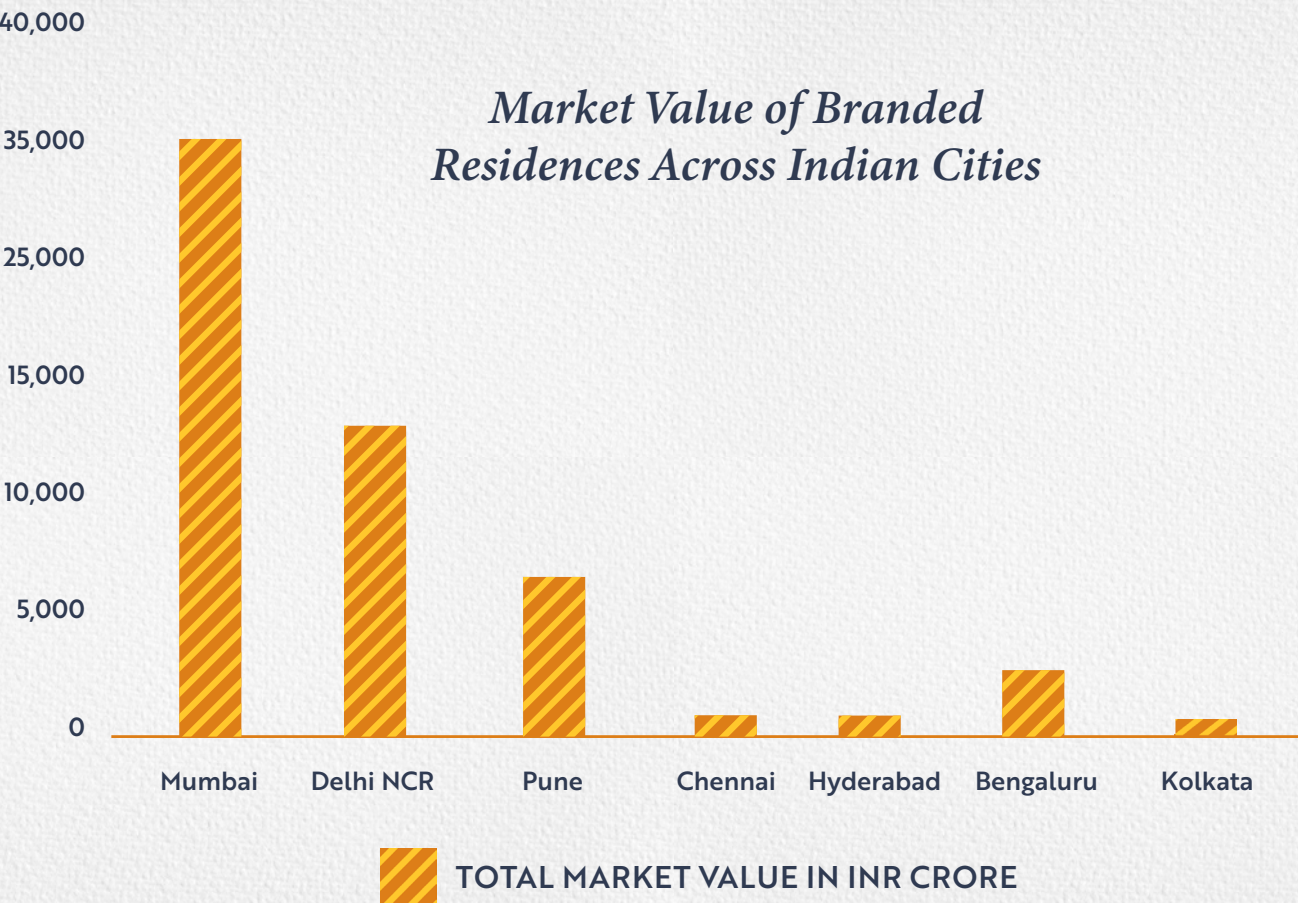
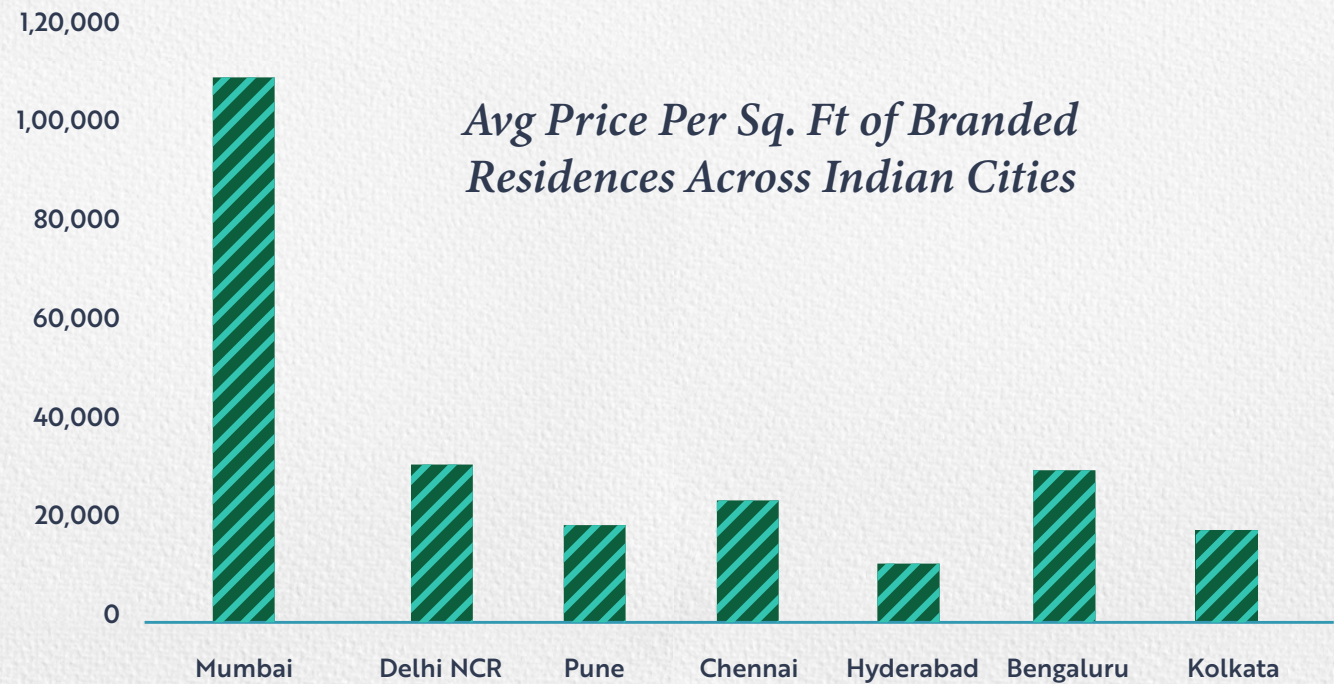
DEVELOPER

ARCHITECT/INTERIOR

FASHION

AUTOMOBILE

Branded Residence Price and Market Value – Indian Cities



Case Study:

Price Premiums in Mumbai

To determine the price premiums that the branded residences command in their respective city/location, we have used the below approach to make the detailed analysis:

- We first established the weighted average price per sq ft of various properties in the area.
- We then established the weighted average price per sq ft of three branded residence projects:
 - *Four Seasons Private Residences*
 - *Versace ABIL Mansion*
 - *Three Sixty West*

Mumbai Price Premiums	
PARTICULARS	PRICE PREMIUM
Branded Residence Projects vs Top Luxury Residence Projects in South Mumbai	21%

We determined that branded projects command a higher premium over high-end residential projects. The average price premium for these branded residential projects is above 21%

Why Branded Residences for Developers?

SLS Residences
Dubai Business Bay
SOLD OUT



35%
Premium
pf

371
Residences

\$7,100
SLS Residences
Dubai Business
Bay pricing / sq
m

SLS Residences
Dubai Business Bay
SOLD OUT



35%
Premium
pf

371
Residences

\$7,100
SLS Residences
Dubai Business
Bay pricing / sq
m

SUPERLATIVE
AMENITIES/
SERVICE



BRAND
EXPRESSION



- Branded residences create a newer, deeper form of luxury expression, allowing residents to fully immerse with brands they align with.
- A Branded residence experience is a tailor made response to the evolving consumer trends, combining two strong social symbols together.
- Luxury brands (hotel and non-hotel) are excited to tap into the Indian market, giving developers (i) a wide range of choices which resonate with their parcel and target market and (ii) a strong bargaining power to command financial negotiations.

A STRONG PRICE PREMIUM

Built in their traditional form (conjoined with the hotel), developers can:

- Capitalize off the booming hospitality segment
- Improve sales velocity from brand assurance to generate strong development cash flows for both - transient and long-term units.

Price Premium



Our analysis shows an average premium for branded residences in India over non-branded products above 21%, which is lower than the global average premium of 30% for branded residences. It's important to note that this premium can vary significantly by location depending on various factors like location, accessibility, unique amenities and market trends.

When a luxury brand is given to a residential product, it benefits from the

same qualities of that brand by association and design. Purchasers of branded residences are assured of a limited supply of quality product that shares the brand's values. Pre-existing brand awareness means the residential product may enjoy a greater profile and attract a larger demand base. For this reason, purchasers are willing to pay more for branded than non-branded property.

Price Premium Advantages – Global

HIGH PREMIUM

Prime global city/location	5-Star Luxury Hotel Service	Specialized curated services
Ultra-prime locality with high accessibility	Luxury Spa and Welleness Facility	Concierge for well tailored services
Renowned Architect/Designer	Exclusive Club Memberships	Exclusive Resident use services
Excellent Views/Upper Floors	Unique Experiences and Leisure Facilities	Brand value association

MODEST TO MEDIUM PREMIUM

Highly desired location	High quality hotel service	Concierge security and management
Prime location with good accessibility	Spa facilities	Residents-only area
Quality building developer	Health and Leisure facilities	Recognition and priority for residents
Recognized Architect/Designers	Good quality restaurants and bars	Discounts for Residents
Good views	Desirable experience	Cachet and confidence from the brand



Benefits for Developers

There are several benefits for developers to collaborate with brands for branded residences:

INCREASED MARKET APPEAL AND RECOGNITION:

- **Brand prestige:** Partnering with a well-established luxury brand like Trump® instantly elevates the project's status and attracts potential buyers seeking that specific brand association.
 - **Targeted marketing:** The brand's existing customer base becomes a potential pool of buyers for the developer.
-

PREMIUM PRICING AND FASTER SALES:

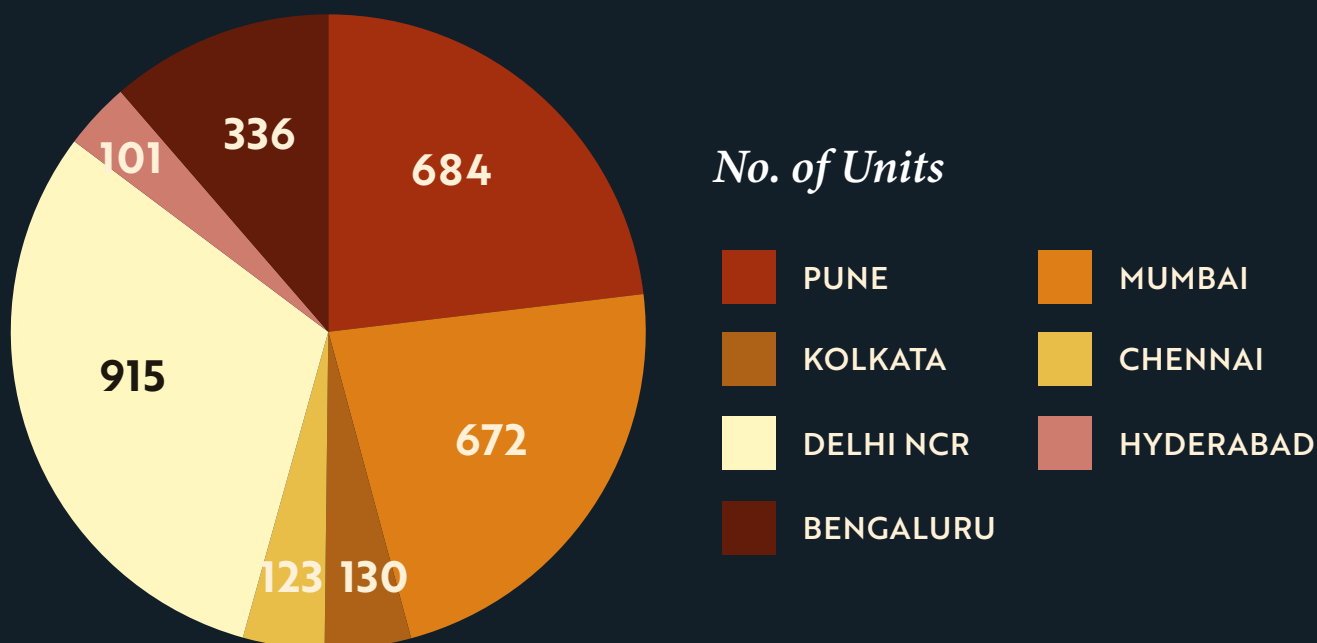
- **Higher price points:** Branded residences often command a price premium compared to unbranded luxury apartments.
 - **Faster sales cycle:** The brand association can attract more interest and lead to quicker sales.
-



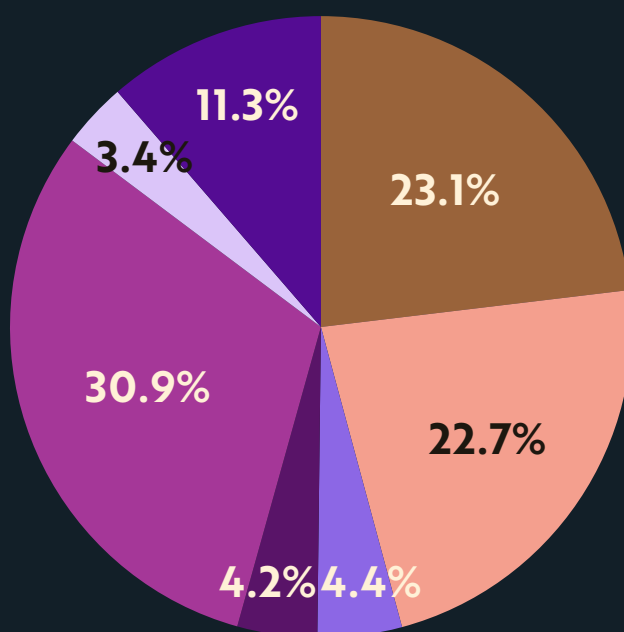
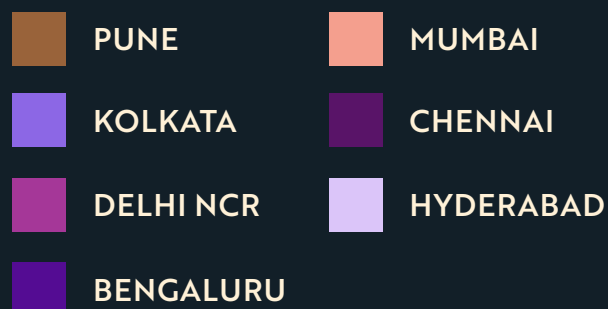
ENHANCED DESIGN AND AMENITIES:

- **Branded design elements:** The brand's design expertise and signature style can be incorporated into the architecture, interiors, and overall aesthetic.
 - **Exclusive amenities:** Collaboration may lead to unique amenities aligned with the brand's image, like a signature spa experience or a private members' club.
-

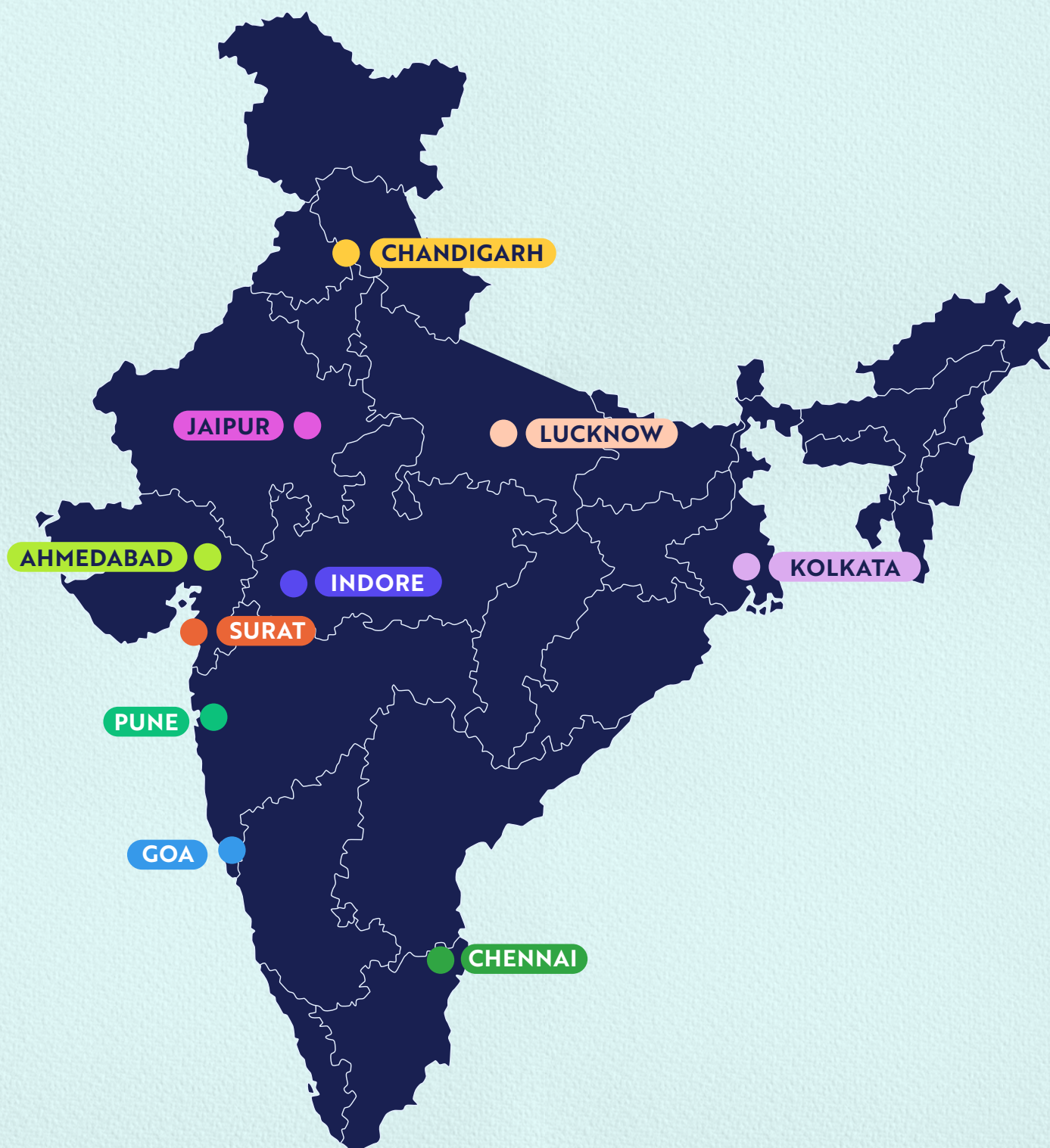
City-wise distribution of Units in India



Percentage Share



Map of Emerging Cities



Emerging City Chandigarh

Chandigarh, the planned city known for its modern architecture and green spaces, has the potential to become an emerging city for branded residences. Here's a breakdown of the reasons why:

Chandigarh Highlights:

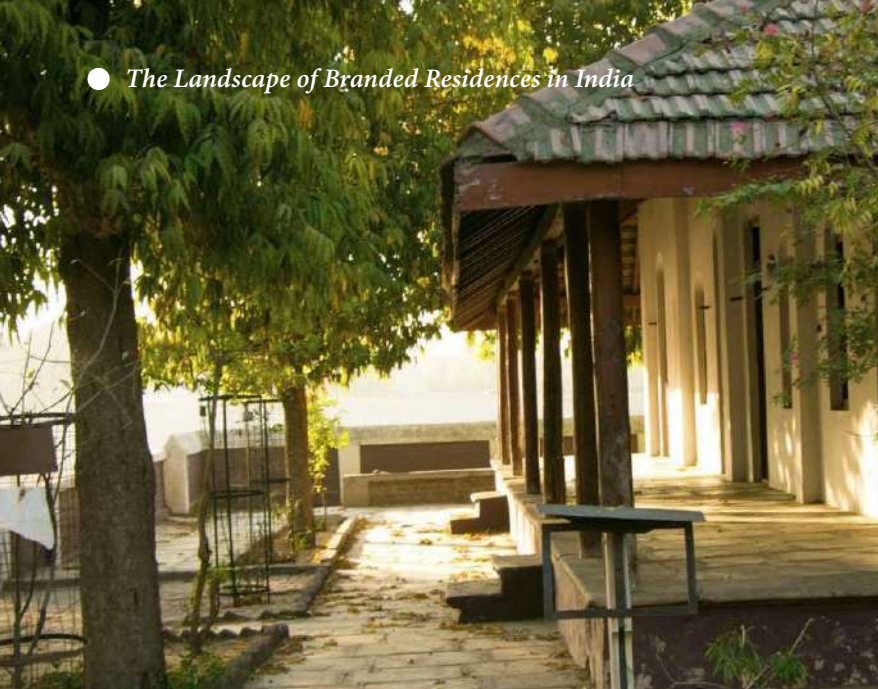
AFFLUENT POPULATION:

Chandigarh boasts a high standard of living with a wealthy population. This demographic is a prime target market for luxury branded residences.



GROWING DEMAND FOR LUXURY REAL ESTATE:

As disposable income rises, the demand for luxury apartments and residences with high-end amenities is increasing in India.



LIMITED SUPPLY:

Currently, the branded residence market in Chandigarh is relatively uncrowded, offering a potential firstmover advantage for developers.

**Some of the top localities for premium residences in Chandigarh include:*

LOCALITY	AVG. PRICE PSQFT (RS.)
ZIRAKPUR	7,800
NEW CHANDIGARH	9,500
MULLANPUR	7,000
SECT 49, CHANDIGARH	18,500



Emerging City Ahmedabad

THRIVING ECONOMY:

Ahmedabad boasts a robust economy with a strong presence in pharmaceuticals, textiles, and other sectors. This economic strength attracts professionals and business leaders who often seek convenient and prestigious living spaces.

A 2023 report by the Gujarat Industrial Development Corporation (GIDC) projects the Gross State Domestic Product (GSDP) of Gujarat to reach ₹ 30 lakh crore (US\$400 billion) by 2027, indicating continued economic growth that could fuel demand for branded residences.





Some of the top localities for premium residences in Ahmedabad include:

LOCALITY	AVG. PRICE PSQFT (RS.)
GIFT CITY	20,300
AMBLI	19,300
SATELLITE	12,450
SCIENCE CITY	15,430
BODAKDEV	18,650
AMBLI BOPAL	17,700

Emerging City

Jaipur

ECONOMIC DEVELOPMENT:

As per the official records released by the Directorate of Economics and Statistics (Rajasthan), the GDP (nominal) of Jaipur district is estimated at INR 1,22,140 crores (\$15.8 billion) in 2020–21, with a per-capita GDP of INR 141,305. In addition to its role as the provincial capital, educational, and administrative center, the economy of Jaipur is fueled by tourism, gemstone cutting, the manufacture of jewelry and luxury textiles, and information technology.



INDUSTRIES:

Jaipur has emerged as a hub of automotive industries with JCB, Hero MotoCorp and Robert Bosch GmBH having their manufacturing plants in Jaipur.



Fine Acres and Wyndham have recently announced a Branded Residence project in Amer, Jaipur. Fine Acres is a well known resort developer whereas Wyndham is one of the largest hotel franchisor in the world.

Some of the top localities for premium residences in Jaipur include:

LOCALITY	AVG. PRICE PSQFT (RS.)
C SCHEME	17,400
JLN MARG	14,250
SWAGE FARM	7,000
NIRMAN NAGAR	7,800

Emerging City Goa

GOA: A PARADISE POISED FOR BRANDED RESIDENCES

Goa, India's sunshine state, is known for its pristine beaches, vibrant nightlife, and a laid-back charm. While traditionally a tourist haven, Goa is now setting its sights on a new horizon – becoming a potential hub for branded residences. Here's why this beach paradise holds promise for this niche market:

Goa's image as a leisure and luxury destination aligns perfectly with the aspirations of many branded residence owners. The opportunity to own a residence managed by a world-renowned hospitality brand or fashion house, nestled amidst the idyllic Goan landscape, offers an unmatched allure.



POTENTIAL FOR FIRST MOVERS:

While Goa boasts luxury hotels, major branded residence developers haven't made a significant mark yet. This presents a golden opportunity for first movers to establish themselves and capture a significant share of this emerging market.



Some of the top localities for premium residences in Goa include:

LOCALITY	AVG. PRICE PSQFT (RS.)
CANDOLIM	15,600
ARPORA	17,900
PANAJI	24,000
PORVORIM	22,500
CUNCHELM	19,500

Other Emerging Cities – *Surat*

Surat, the "Diamond City of India," is synonymous with wealth and a burgeoning taste for luxury. The city's economic boom, fueled by the diamond industry and textiles, has fostered a growing affluent population seeking a sophisticated lifestyle. Here's why Surat shines:



AFFLUENT CLIENTELE:

The city boasts a high concentration of high-net-worth individuals, creating a ready market for branded residences.

UNDERSTATED OPULENCE:

Surat's culture leans towards understated elegance, potentially attracting brands offering a refined and personalized living experience.

STRATEGIC LOCATION:

Situated in Gujarat, Surat offers easy access to Mumbai, further enhancing its appeal.

Some of the top localities for premium residences in Surat include:

LOCALITY	AVG. PRICE PSQFT (RS.)
VESU	5,500
ADAJAN	4,050
PAL	4,700
ALTHAN	4,500
VIP ROAD VESU	5,900
BHIMRAD	4,500



Other Emerging Cities – Indore

Indore, the vibrant heart of Madhya Pradesh, is rapidly transforming into a major commercial and cultural hub in India. While not yet a dominant player in the branded residence market, the city exhibits intriguing possibilities for future growth. Here's a deeper look at why Indore could be an emerging destination for branded residences:

Indore's growth trajectory, rising affluence, and existing tourist base suggest potential for future development in the branded residence space. Monitoring local developer activity, pilot projects (like those seen in Jaipur), and trends in India's luxury real estate market can provide valuable insights into the potential of branded residences in Indore.





Some of the top localities for premium residences in Indore include:

LOCALITY	AVG. PRICE PSQFT (RS.)
BICHOLI MARDANA	8,500
SCHEME NO 54	7,500
VIJAY NAGAR	8,750
TALAWALI CHANDA	7,000
MR 10	7,700

Other Emerging Cities – Lucknow

Lucknow, the captivating "City of Nawabs," is undergoing a renaissance. While steeped in historical splendor, Lucknow is embracing modern development, making it a potential contender for the next wave of branded residences in India. Here's why Lucknow deserves a closer look:

RICH HERITAGE AND CULTURAL BLEND:

Lucknow boasts a unique blend of Mughal architecture and colonial influences, offering a captivating backdrop for branded residences. Imagine a world-renowned brand curating a living experience that seamlessly blends historical charm with contemporary luxury.





Some of the top localities for premium residences in Lucknow include:

LOCALITY	AVG. PRICE PSQFT (RS.)
GOMTI NAGAR	14,500
VIBHUTI KHAND	12,350
CHINHAT	7,500
MAHANAGAR	17,000
ALIGANJ	7,450

Branded Residences: Worldwide



RAFFLES RESIDENCES, BOSTON



ATTRIBUTES	DESCRIPTION
Developer	<i>Noannet Group</i>
Brand	<i>Accor</i>
Location	<i>430 Stuart St, Boston, Massachusetts 02116, United States of America</i>
Core Amenities	<i>24/7 Concierge, 24/7 Security, 24/7 Valet, Wine Selection Services, F&B Tastings, Inroom Dining</i>
À La-Carte Amenities	<i>Personal Chef/Catering, Nutritionist and Wellness, Shopper Service, PA/Secretary, Childcare, Dry Cleaning, Private Limousine Service, 'While Away' Maintenance, Florist, Pet Walking, Magazine/Newspaper Doorstep Delivery, Housekeeping</i>
Reported Premium	<i>50%</i>
Inventory	<i>146 units</i>

FAIRMONT ROYAL PALMS, MARRAKECH



ATTRIBUTES	DESCRIPTION
Developer	<i>Semaris LTD</i>
Brand	<i>Accor</i>
Location	<i>Km 12 Route D'Amizmiz, Marrakech 40000, Morocco</i>
Core Amenities	<i>6 Restaurants, 3 Bars, 2 Gyms, 4 Tennis Courts, Signature Spa, Farm</i>
À La-Carte Amenities	<i>Childcare, Chauffeur, Fitness Instructor, Golf Instructor, In-Room Dining, 'While Away' Maintenance, Housekeeping, Pool Maintenance, Landscaping, Shopper, Dry Cleaning</i>
Reported Premium	<i>95%</i>
Inventory	<i>53 units</i>

RAFFLES RESIDENCES OWO, LONDON



ATTRIBUTES	DESCRIPTION
Developer	<i>Hinduja Group</i>
Brand	<i>Accor</i>
Location	<i>57 Whitehall, London SW1A 2BX, United Kingdom</i>
Core Amenities	<i>Lounges, Private Dining, Game Zone, 16 Seater Cinema, Fitness Studio, Treatment Suite</i>
Reported Premium	<i>40%</i>
Inventory	<i>85 units</i>

ASTON MARTIN RESIDENCES, MIAMI



ATTRIBUTES	DESCRIPTION
Developer	<i>G&G Business Development</i>
Brand	<i>Aston Martin</i>
Location	<i>300 Biscayne Blvd Way, Miami, Florida 33131, United States of America</i>
À La-Carte Amenities	<i>Art Gallery, Business Centre, Conference Room, Kids Room, Teen Centre, Game Room, Vending Area, Fitness Centre, Spa, Spinning Room, Boxing Room, Sauna, Meditation Room, Salon, Virtual Golf, Movie Theatres, Infinity Pool, Cabanas, Sky Bar, Chef's Kitchen, Private Dining Room, Yacht Parking, Butler Service</i>
Inventory	<i>391 units</i>

BENTLEY RESIDENCES, MIAMI



ATTRIBUTES	DESCRIPTION
Developer	<i>Dezer Development</i>
Brand	<i>Bentley</i>
Location	<i>18401 Collins Ave #2420, Sunny Isles Beach, Florida 33160, United States of America</i>
On-Demand Service	<i>Restaurant/Hotel/Limousine/Travel/Golf/Tennis/Sports & Entertainment Information and Reservation Service, Car Concierge, Laundry, Dry Cleaning, Yacht Reservation, Packing & Shipping Coordination</i>
À La-Carte Amenities	<i>Housekeeping Services, Handyman Services, Grocery Shopping, Plant Maintenance, Personal Chef, Dog Walking, Pet Grooming, Spa Treatments, Nanny & Childcare, Alterations, Car Washing & Detailing, Personal Chef, Personal Trainer</i>
Inventory	<i>216 units</i>

ST. REGIS COSTA MUJERES



ATTRIBUTES	DESCRIPTION
Developer	AB Living Group
Brand	Marriott
Location	Blvd. Kukulcán km 1.5 entrada a Puerto Cancún, 77500 Cancún, Q.R., Mexico
Core Amenities	Lounge & Library, The Drawing Room, Wine Vault, St Regis Bar, Tequila Room
À La-Carte Amenities	Beach Club, Infinity Pools, Drawing Room, Library, Water Park, Kids Club, Cooking Classes, Spa and Fitness Center, Rooftop Pool and Lounge, Ballrooms, Meeting Spaces and Boardrooms, Outdoor Cinema
Inventory	80 units

RITZ CARLTON HANOI



ATTRIBUTES	DESCRIPTION
Developer	Masterise Homes
Brand	Marriott
Location	25-27 P. Hai Bà Trưng, Hàng Bài, Hoàn Kiếm, Hà Nội 100000, Vietnam
Amenities	Lobby Lounge, Game Room, Theater, Indoor Pool, Gym, Kid's Club, Private Function Space with Show Kitchen, Boardroom & Lounge
Inventory	104 units

ST REGIS MIAMI



ATTRIBUTES	DESCRIPTION
Developer	<i>Related Group & Integra Investments</i>
Brand	<i>Marriott</i>
Location	<i>1809 Brickell Ave, Miami, FL 33129, United States</i>
Amenities	<i>Fine Dining, Exclusive Beach Club, Green Terrace, Media Room, Business Centre, Conference Rooms. Children’s Entertainment Room. Ten Room, Multi-Sport Simulator, Climate Controlled Storage, Private Marina, Infinity Pool, Chartered Yacht, MichelinQuality Food</i>
Inventory	<i>152 units</i>

W RESIDENCES KOH SAMUI



ATTRIBUTES

DESCRIPTION

Developer

City View Place Holdings

Brand

Marriott

Location

4, 1, Mae Nam, Amphoe Ko Samui, Surat Thani 84330, Thailand

Amenities

24-hour reception, Concierge service, Welcome Ambassador, Lounge, On-site all-day dining restaurants, Bar, Beach Club, Spa, Tennis court, Fitness centre, Swimming pool, Giant chessboard, 24-hour security system with CCTV. Additional services, In-house spa services, In-house dining table service, Personal chef, Food purchasing service (Grocery Pick-up and fridge stocking), Laundry service, Attorney / Notary Public Service, Interpretation service, Shuttle service, International parcel or document delivery service, Pet service, Conference service

Inventory

17 units

THE LAKES BY YOO



ATTRIBUTES	DESCRIPTION
Developer	<i>City View Place Holdings</i>
Brand	<i>YOO</i>
Location	<i>High Street, Lechlade GL7 3DT, United Kingdom</i>
Amenities	<i>Farm to Plate Ingredients, Lakeside Restaurant, Event Spaces, Open Kitchen, Waterside Terrace, Private Bar</i>
Details/Notable Facts	<i>The project is split across a massive land parcel and features unique typologies, such as cabins, farm barns, lakeside apartments and homes with their own private nature reserves</i>

MANDARIN ORIENTAL 5TH AVENUE, NEW YORK CITY



ATTRIBUTES	DESCRIPTION
Developer	SHVO
Brand	Mandarin Oriental
Location	685 5th Ave, New York, New York 10022, United States of America
Core Amenities	Michelin-Star Private Dining, Floral Services, Dog Walker, Dinner Reservations, Laundry, Spa Services, In-Room dining, Concierge, Digital Stylist, Private Shopping
Inventory	65 units

MARRIOTT AND JW MARRIOTT RESIDENCES, GRAND MARINA SAIGON



ATTRIBUTES

DESCRIPTION

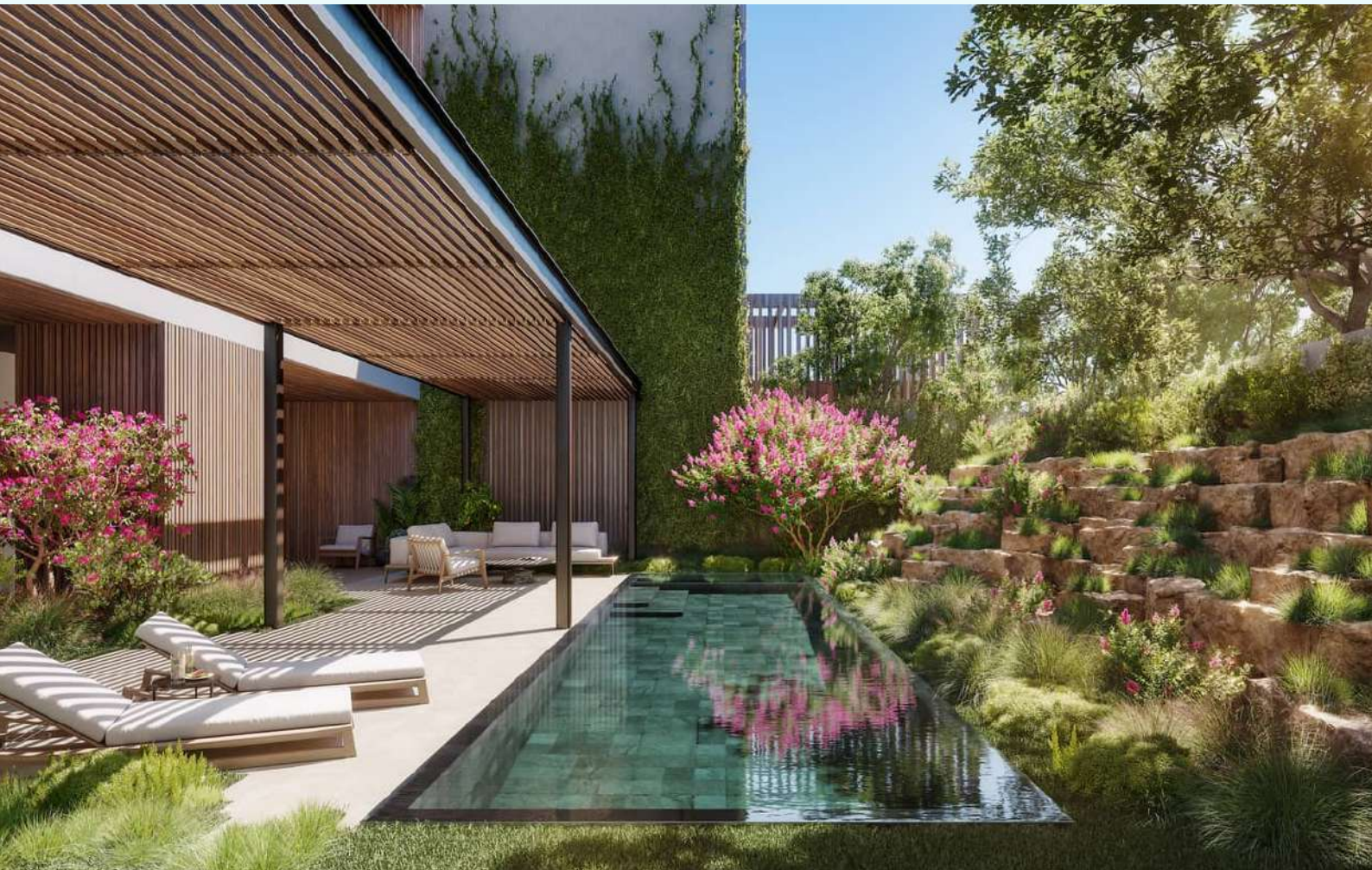
Developer	<i>Masterise Group</i>
Brand	<i>Marriott</i>
Location	<i>No. 2, Ton Duc Thang, Ben Nghe Ward, District 1, Ho Chi Minh City, Vietnam</i>
À La-Carte Amenities	<i>Grocery Shopping, Laundry, Alterations, Car Washing/Detailing, Vacation Planning, Equipment Rental, PA/Secretary, Function Planning, In-Residence Dining, Mail Shipping, Personal Chef, Plant Care, Personal Trainer, Transaltion Services, In-Hope Spa, Nanny & Childcare, Pet Grooming</i>
Inventory	<i>3800+ units</i>

NOBU RESIDENCES, LOS CABOS



ATTRIBUTES	DESCRIPTION
Developer	<i>Nobu</i>
Brand	<i>Nobu</i>
Location	<i>Diamante Blvd. Polígono 1. Fracción D, Fraccionamiento Diamante, 23473 Cabo San Lucas, B.C.S., Mexico</i>
Core Amenities	<i>Bathtubs/Soaking Tubs, Exclusive (Simmons) Nobu Beds, Double vanities with Italian Stone, Local Ambassador / Personal Concierge</i>
Inventory	<i>60 units</i>

FOUR SEASONS LAKE AUSTIN



ATTRIBUTES	DESCRIPTION
Developer	<i>Austin Capital Partners</i>
Brand	<i>Four Seasons</i>
Location	<i>98 San Jacinto Blvd, Austin, Texas 78701, United States of America</i>
Amenities	<i>Infinity Pool, Cabanas, Private Dining, 96 Seater Theater, Private Marina, Clubhouse, Indoor Sports Club</i>
Inventory	<i>188 units</i>

THE WHITELEY SIX SENSES



ATTRIBUTES	DESCRIPTION
Developer	<i>Meyer Bergman</i>
Brand	<i>Six Senses</i>
Location	<i>The Whiteley, Queensway, London, W2 4YN</i>
Core Amenities	<i>Lobby Bar and Lounge, All-Day Dining Restaurant, Six Senses Spa, Indoor Swimming Pool, Alchemy Bar, Gym, Relaxation Room, Six Senses Place Amenities, Central Bar and Lounge, Restaurant, Private Dining Rooms, Co-Working Spaces, Wellness Rooms, Meeting Spaces</i>
Inventory	<i>14 units</i>

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Empowering investors with deep insights and strategic expertise, Noesis transforms visionary ideas into successful hospitality ventures across India and beyond

NANDIVARDHAN JAIN

Chief Executive Officer

+91 9223368382

nandivardhan.jain@noesis.co.in

VIJAY BHANDARI

Chief Operating Officer

+91 9910048637

vijay.bhandari@noesis.co.in

PIYUSH VALENDRA

Associate Director

+91 97691 95420

piyush.valendra@noesis.co.in

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