



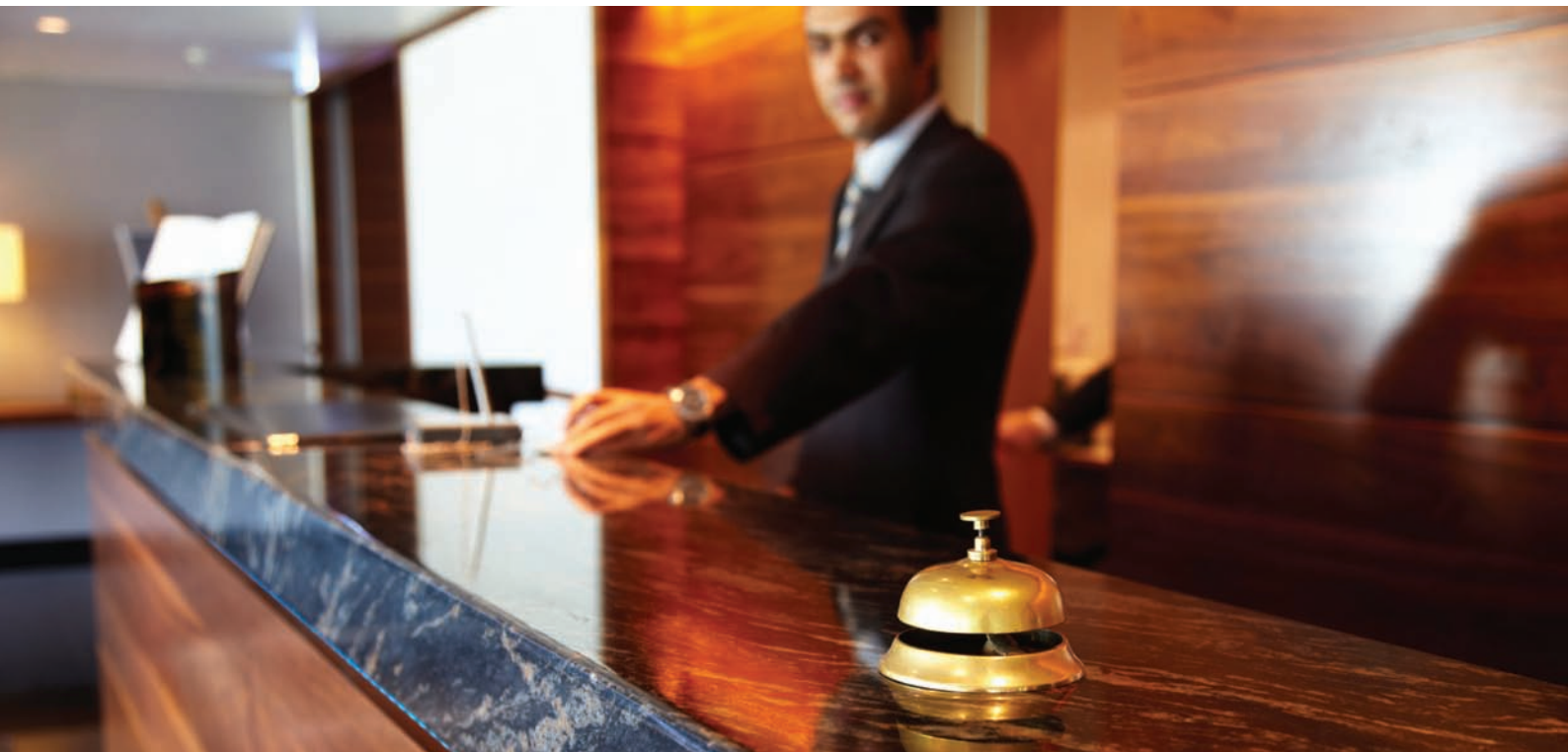
Horwath HTL™

Global Leader in Hotel, Tourism and Leisure Consulting
Celebrating 100 years in 2015

Hotel, Tourism and Leisure



Horwath HTL **Tourism & Leisure**



Horwath HTL, the worlds number one hospitality consultants. We are the industry choice; a global network offering complete solutions.

Horwath HTL has become synonymous with quality, service, impartial advice and expertise. Whatever your requirements, we can help you succeed.

Our experience

- Hotels & Restaurants
- Spas & Golf Courses
- Conference & Meeting Facilities
- Mixed-use Developments
- Tourism & Resorts
- Brand Expansion

Helping you get results at all stages of a project's life

Tourism & Leisure:

- Appraisal Reports
- Destination & Large Scale Project Master Planning
- Facilities Programming
- Highest & Best Use
- Hotel Management Company Selection & Contract Negotiation
- Macro Tourism Analysis
- Market & Financial Feasibility Studies
- Market Entry Strategy
- Product Conceptualisation & Financial Structuring
- Residual Land Valuation
- Strategic Planning
- Tourism Planning

Horwath HTL Tourism & Leisure Services

Global expertise and support

Tourism and Leisure projects make up a large part of our business at Horwath HTL and we pride ourselves on having worked on some very significant projects all over the world. Tourism now accounts for such a high proportion of GDP that extensive investment is being made in the sector, both publicly and privately, and many countries have identified Tourism as the driver for significant growth. Our experts take a systematic approach to every aspect of your project.

"Tourism and Leisure is a vast and highly technical component of global tourism that demands ability and experience to ensure success. There are no shortcuts in what we do, many of the projects we work on require the balancing of public and private financing, with all of the complexity that brings."

**Stephane Durand, Global Practice Leader,
Horwath HTL France**

Public policy and framework play a fundamental part in the development and success of tourism initiatives and form the backbone of our expertise. We work together with local offices and governmental bodies to fully develop a strategy based on technical skill and international best practices to create viable long-term schemes that will create value and sustainability.

At this stage of the development, we offer a range of services to scope out public policy, examine the long term development and the likely economic impact they will have, develop master plans, specific concepts, feasibility studies, strategic, operational and marketing plans.

We work with local or national tourist organisations, countries, regions or communities, providing a thorough diagnosis of the territory in question, and a proposal for developing a tourism and leisure strategy with a five to ten year action plan.

At Horwath HTL, we specialise in three key areas: Planning and Strategy, Project Management and Operational advisory.

In each of these areas we have many hundreds of references and a proven track record in providing valuable advice and assistance.

Planning & Strategy

- Tourism development strategy
- Institutional Support
- Observation, Impact Studies, New Technologies
- Public Policy Evaluation
- Tourism Statistics

Project Management

- Master Planning
- Feasibility/Programming Studies
- Market Research Studies
- Technical Assistance
- Business Plan
- Destination Strategy (brand)

Operational Advisory

- Audit/Operational Review
- Assistance in setting-up projects/Public Procedures
- Search for Investors & Public/Private Player
- Owner Representation

"Horwath HTL had the skill and ability to provide consulting services that combined global know-how with local expertise. The Horwath HTL team were a great resource - both meeting and exceeding our goals on several occasions"

Meri Matesic, Director, Croatian Tourism Board



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