



Horwath HTL™

*Hotel, Tourism and Leisure*

Tourism and  
Leisure Services



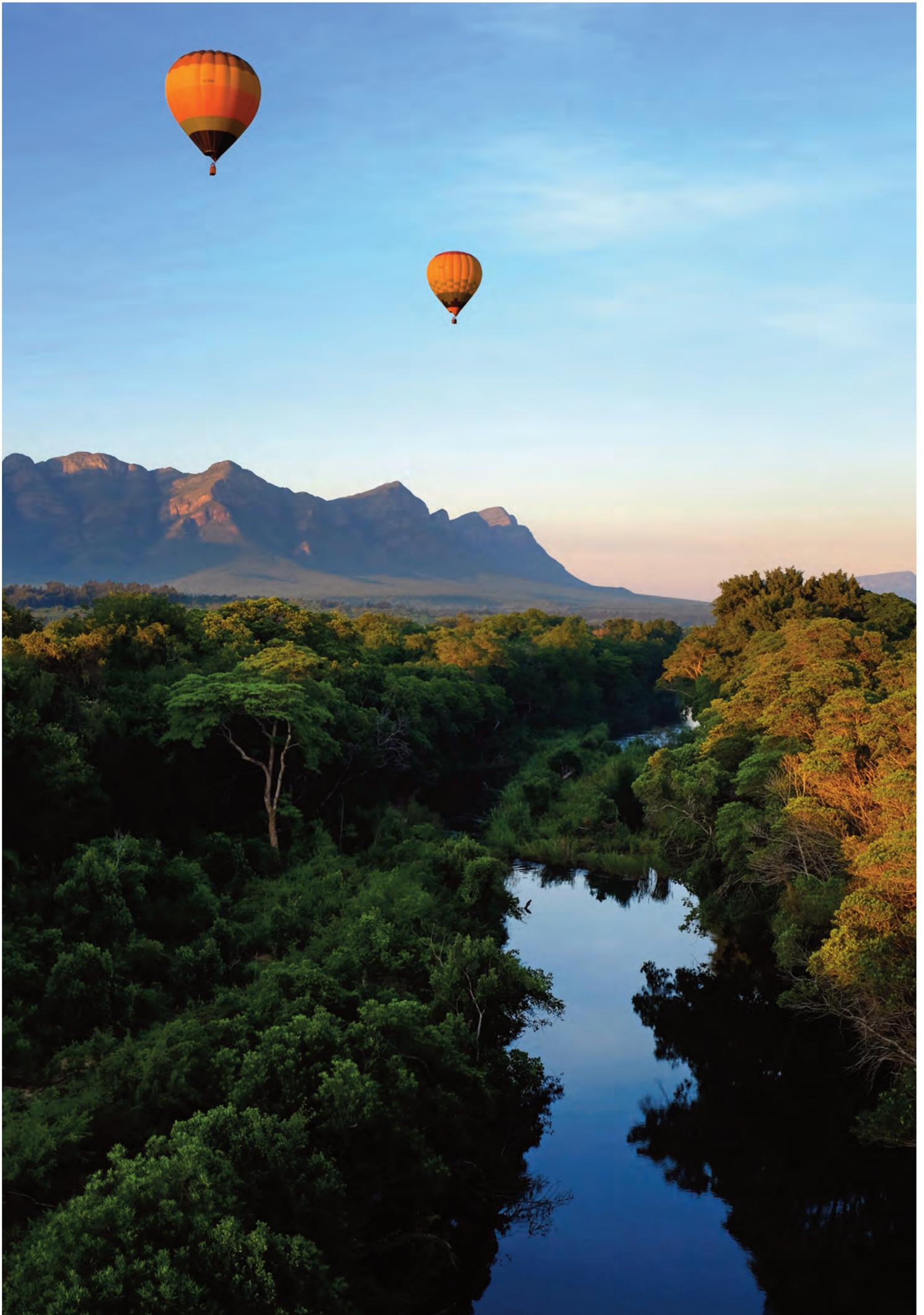


“Today, more than one billion tourists travel to an international destination every year.

These billion tourists have made tourism a leading economic sector, contributing 10% of global GDP and 6% of the world’s total exports.

These big numbers represent more than just economic strength - they reflect tourism’s vast potential and increasing capacity to address some of the world’s most pressing challenges, including socio-economic growth, inclusive development and environmental preservation.”

Taleb Rifai, UNWTO Secretary-General, 2016



## Tourism & Leisure Services

Tourism and Leisure projects make up a large part of our business at Horwath HTL and we take pride on having worked on some very significant projects all over the world.

### **DESTINATION DEVELOPMENT STRATEGIES:**

- Tourism Development Strategies
- Tourism Masterplans
- Strategic and Operational Tourism Marketing Plans
- Tourism Impact Assessments

### **MARKETING STRATEGIES:**

- Market potential study
- Market entry strategy
- Market penetration study
- Strategic and operational marketing plan
- Branding brief

### **INSTITUTIONAL SUPPORT:**

- Destination management support
- Strengthening tourism sector value chain
- Improvement of legal and institutional frameworks
- Economic analysis
- Evaluation of public policies
- Digital tourism strategy

### **PROJECT DEVELOPMENT ASSISTANCE:**

- Opportunity study and best use analysis
- Financial and Market Feasibility study
- Concept development, programming and master planning
- Scenography and architectural design

### **PROJECT MANAGEMENT ASSISTANCE:**

- Operational deployment of projects
- Support during contractual procedures
- Operators and investor search



## Public Policy Frameworks

“Each client is a unique individual for us. In our history, Horwath HTL has worked with more than 80 governments in the field of tourism development.”

Siniša Topalović, Managing Director, Horwath HTL Croatia

Tourism 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 tourism administrations, government ministries and other tourism agencies to fully develop a development strategy. This is based on technical skill combined with international best practices to create viable and valuable long-term schemes.

We offer a range of services to scope out public policy:

- Evaluate destination's current status, identity and market position
- Develop a strategic goal together with key stakeholders
- Develop an overall strategy for growth and redevelopment
- Attract operators, investors and customers to the redefined location

We have worked with more than 80 governments globally, and helped many territories on their way to becoming successful tourist destinations.



## Private and Public Investors and Developers

“The strength of Horwath HTL, is that we operate virtually in all geographies - enabling us to provide highly specialised solutions for the business challenges our clients face.”

Stephane Durand, Managing Director, France, Horwath HTL

Thanks to our wide network of experts among our permanent staff and affiliated consultants, Horwath HTL is able to provide assistance and be innovative on a wide range of projects, including mixed-use and very specific, cutting-edge or hybrid concepts.

We support private and public investors and developers throughout the creation and life of their tourism and leisure projects, with the following services:

- Concept Development
- Programming and Master Planning
- Market Studies
- Feasibility and Business Plans
- Investors and Operators Search
- Setting-up public-private procedures
- Operational Advisory
- Brand Strategy

### **OUR PROJECTS:**

- Congress & Event Centres
- Culture & Heritage Sites
- Sport Facilities
- Retail & Entertainment
- Holiday Resorts & Clubs
- Theme Parks
- Interpretation Centres
- Natural & Animal Parks

## Tourism & Leisure Success Stories



### DEVELOPMENT STRATEGY OF THE EIFFEL TOWER 2017-2024

**Client:** Eiffel Tower Operation Company  
**Country:** France  
**Completion:** 2016

#### OVERVIEW:

As part of the renewal programme being implemented by the city of Paris, Horwath HTL was entrusted by the Eiffel Tower Operation Company to create a development strategy for the site to be deployed between 2017-2024.

Our scope of work included redesigning the management of the visitors' flows, establishing a new pricing strategy, establishing a strategy for the diversification of sources of revenue, notably through partnerships with luxury brands, and developing the Eiffel Tower investment plan for the next 8 years, including a visitor welcome centre which will be a 127 million euro investment.



### TOURISM MARKETING AND BRANDING STRATEGY FOR SOUTH DUBLIN COUNTY

**Client:** South Dublin County Council  
**Country:** Ireland  
**Completion:** 2017

#### OVERVIEW:

Horwath HTL was awarded the tender to work with South Dublin County Council on the 'Development and Implementation of a Tourism Marketing and Branding Strategy'.

Our scope of work involved presenting a clear vision for positioning South Dublin County as a tourism destination, identifying the visitor target markets, building a brand identity, creating an integrated marketing strategy to engage local tourism businesses and attract visitors and developing creative marketing campaigns to showcase tourism products and services.

This project resulted in the creation of the first tourism marketing strategy for the county, the development of a tactical plan and a range of marketing materials, including: logo, display material, printed material and videos.

## Tourism & Leisure Success Stories



### DEFINITION OF THE LEISURE, NATURE AND ANIMAL EXPERIENCE FOR CENTER PARCS

**Client:** Center Parcs ,  
Pierre & Vacances  
**Country:** Europe  
**Completion:** 2008 - ongoing

#### OVERVIEW:

With 20 resorts in Europe, Center Parcs (Pierre & Vacances group) is the European leader for short-term stays in natural forest environments. The key success factors are a forest setting, an exceptional Aquamundo (tropical pools) flagship facility, cottages that are part of the landscape and a variety of other services.

Since 2007, Horwath HTL has assisted in the development of several projects for Center Parcs, including strengthening the visitor experience with the wild animals in the various animal parks and enclosures.

The scope of work was to assist the group in the development of its animal/wildlife projects, either in the definition of the concepts, the design itself and the management of the regulatory requirements.



### STRATEGIC TOURISM MARKETING PLAN FOR CROATIA

**Client:** Croatian National  
Tourist Board  
**Country:** Croatia  
**Completion:** 2014-2020

#### OVERVIEW:

Croatia has experienced a level of growth in tourism much higher than other markets. Horwath HTL was engaged to define the goals and vision for 2020.

The goal is entry to the top 20 global tourism destinations, enhance the reputation of the 'Croatia' brand and solidify its position as a leading player in the Mediterranean. This includes improving the quality of tourism in line with international benchmark markets.

Specific activities were developed including: Strategic marketing analysis, umbrella marketing plan, brand strategy, umbrella operational marketing plan, product marketing plan, cluster marketing plan, emissive markets' marketing plan, implementation and controlling of marketing plan and a strategy for EU funding.

## Tourism & Leisure Success Stories



### TOURISM DEVELOPMENT STRATEGY OF THE REPUBLIC OF KAZAKHSTAN

**Client:** Kazakhstan Industry and Development Institute  
**Country:** Kazakhstan  
**Completion:** 2012

#### OVERVIEW:

Horwath HTL was mandated by the Kazakhstan Industry Development Institute to develop the first tourism policy and objective-setting document in the country's history.

Our comprehensive scope of work included building a strategic vision for tourism by 2020, planning and implementation of the Kazakh tourism development program, evaluation of tourism investment projects and state-supported measures.

We also instigated institutional capacity building activities and assisted in the creation of a national destination management organization. Finally, we created a marketing and promotion strategy as well as assisting in setting up the first national tourism statistical system.



### STRATEGIC MARKETING PLAN OF EGYPT ON THE CHINESE MARKET

**Client:** IFC- The World Bank Group  
**Country:** Egypt and China  
**Completion:** 2015

#### OVERVIEW:

Horwath HTL's Paris and Hong-Kong offices worked together on this study aimed at discovering the most effective marketing and promotion tools to promote Egypt in the Chinese market, increasing the number and value of Chinese tourists to the country.

The assignment involved qualitative interviews with Chinese and Egyptian tour operators and airlines, a media review of the perception of the destination, including Chinese social networks.

The report assessed air connectivity, provided a forecast of the number of Chinese to Egypt by 2020, created a benchmark of marketing strategies implemented by destinations successful at attracting Chinese tourists. Lastly, a workshop with Egyptian tourism authorities was established to define marketing actions and plan their implementation.

## Tourism & Leisure Success Stories



### TOURISM DEVELOPMENT STRATEGY AND HERITAGE PRESERVATION IN SELECTED TOWNS, RUSSIAN FEDERATION

**Client:** Saint-Petersburg Foundation for Investment Projects - The World Bank  
**Country:** Russia  
**Completion:** 2014

#### OVERVIEW:

The goal of the Project was to support the preservation of the cultural heritage and development of tourism in selected historic towns and cities.

The goal was to create additional tourism growth and improve the economic impact to the selected historic towns.

Horwath HTL experts produced sustainable tourism development strategies and the corresponding implementation plans for each of nine historic towns under this project.



### MASTER PLAN OF TOURISM DEVELOPMENT ON BADALING GREAT WALL

**Client:** Beijing Badaling Legend Tourism Development Company  
**Country:** China  
**Completion:** 2013

#### OVERVIEW:

Horwath HTL was hired to create the development strategies for the leisure and accommodation facilities being proposed at the Legend Badaling Great Wall.

This program of development included several hotels, the re-construction of a village, and retail and food & beverage facilities. Horwath HTL worked on the development of the scheme to ascertain what the demand for such facilities would be and what return on investment could be expected. This included a full market and financial feasibility with expected visitor numbers, required type and size of hotel rooms needed, expected financial performance of all F&B outlets as well as cash flow projections on each element.

“With more than one billion international tourists now traveling the world each year, tourism has become a powerful and transformative force that is making a genuine difference in the lives of millions of people.

The potential of tourism for sustainable development is considerable. As one of the world’s leading employment sectors, tourism provides important livelihood opportunities, helping to alleviate poverty and drive inclusive development.”

Ban Ki-moon, UN Secretary-General, 2016



### Further Information

For further information, please contact one of the team via the website: <http://horwathhtl.com/>

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### Global Leader in Hotel, Tourism and Leisure Consulting

Horwath HTL is the world's largest hospitality consulting brand with 45 offices across the world providing expert local knowledge. Since 1915 we have been providing impartial, specialist advice to our clients and are recognized as the founding contributor of the Uniform System of Accounts which subsequently has become the industry standard for hospitality accounting.

We focus one hundred percent on hotels, tourism and leisure consulting and have successfully completed over 16,000 projects. When our clients work with us, it is because they need answers to very specific questions. We know that every project is different and reaches a point where expert advice will mean the difference between success and failure.

With over two hundred professionals and membership of a top ten accounting network, we are the number one choice for companies and financial institutions looking to invest and develop in the industry.

Horwath HTL is a member of Crowe Horwath International, a professional association of accounting and management consulting firms founded in New York in 1915. Crowe Horwath International is currently ranked among the top ten international professional service groups with offices in 586 cities in 108 countries.