

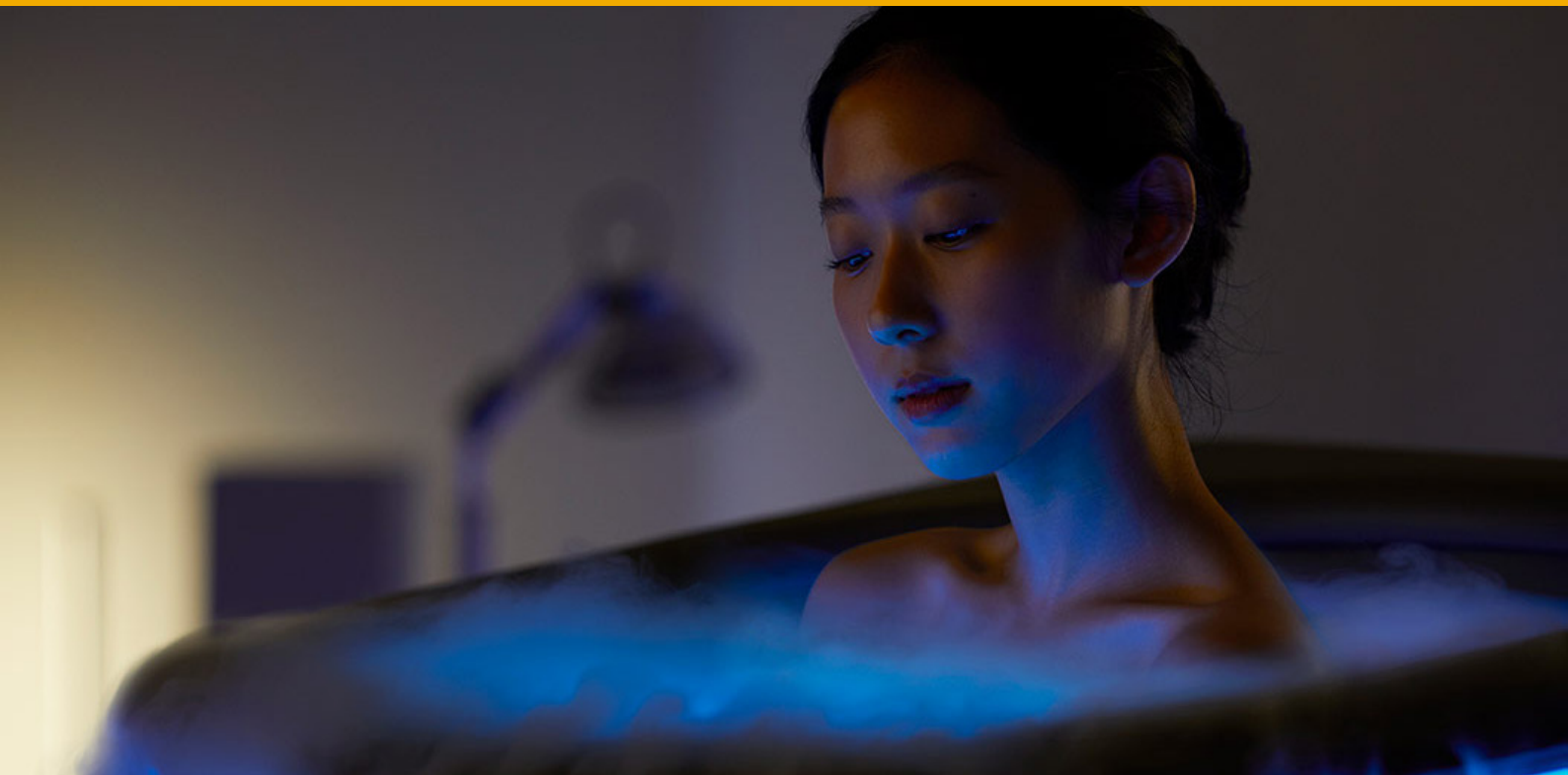


Horwath HTL
Health & Wellness

INDUSTRY REPORT

**Leveraging Wellness
to sustain & advance
Hospitality in the
Covid-era**

MAY 2021



Introduction

In 2017, the global wellness economy was identified as a USD 4.5 trillion industry by the Global Wellness Institute, with hopeful predictions of strong growth and greater expenditures in the years to come. As tourism continued to grow worldwide, the years that followed saw a boom in wellness, with the industry, which includes wellness tourism, traditional and complementary medicine, nutrition, physical activity, mental wellness, wellness real estate, personal care and beauty, workplace wellness, spa economy, and thermal mineral bathing, growing at almost twice the rate of global economic growth between 2017 and 2019.

Yet by 2020, the world was plunged into a pandemic unlike any seen in over a century, hitting health, education and income in such a way that human development declined for the first time since 1990¹. Affecting every aspect of life worldwide, countries have faced ongoing waves of viral transmissions that have remained both chaotic and predictable. Last year saw the highest excess death rates in some Western countries since World War Two², and never before in recent memory has the health and wellbeing of so many people declined so rapidly and simultaneously.

And although the world has yet to see the end of the coronavirus pandemic – with some predicting we never will fully eradicate it – this decline in physical and mental health has given rise to an acute awareness around the importance

of maintaining good health and wellbeing. Current market sentiment and surveys from across all markets suggest that the wellness industry will likely see another surge in the late- to post-pandemic eras as people become increasingly conscious and proactive in maintaining their overall health in more effective and long-lasting ways.

At the time of publication, vaccination programmes are rolling out across all continents, resulting in the lifting of various lockdown regulations, with governments hoping to return to some form of normalcy by the end of 2021. For many countries whose borders have been closed for the duration, the light at the end of the tunnel is finally coming into view, and in response, the hospitality industry is cautiously gearing up for an influx of international visitors eager to travel, driven by significant pent-up demand and a need to escape the tribulations of pandemic life, even if only momentarily.

This paper sets out to identify how the emergence of late- and post-coronavirus era travel, and the understanding around health and wellbeing are changing and becoming more significant than ever, as well as to explore how the hospitality industry can leverage this growing interest to sustain and advance service offerings in resilient and effective ways over the next decade.

¹ UNDP Human Development Report Office (2020)
<http://hdr.undp.org/en/hdp-covid>

² UK Office of National Statistics and Istituto Nazionale di Statistica



The Fallout of a Pandemic

The world saw a record-breaking 1.5 billion international tourists annually in pre-pandemic times, and 2019 was the tenth consecutive year of sustained tourism growth worldwide. Tourism accounted for USD 1.7 trillion in expenditures and sat firmly as the third-largest export category, and much like the wellness industry, was also growing faster than the world economy³.

In 2020, the coronavirus pandemic struck, creating a year marked by business closures – many of which have yet to reopen. On 30 January 2020, the World Health Organisation (WHO) declared the coronavirus outbreak a global health emergency, and on 11 March 2020, the outbreak was marked as a pandemic.

By 20 April 2020, every single country had introduced significant travel restrictions, and as of late 2020, 27% of all destinations had maintained these restrictions by keeping their borders completely closed to international tourism⁴.

As a comparison, the 2009 Global Economic Crisis saw a 4% decline in international tourism arrivals. In 2020, the coronavirus pandemic was singlehandedly responsible for a decline in international tourism to the tune of 74%, with an estimated number of international tourist arrivals plummeting from 1.5 billion in 2019 to just shy of 400 million.

To put this impact into perspective, the tourism industry is now at levels seen 30 years ago, causing a loss of over USD 2 trillion in global GDP and putting 100-120 million direct tourism jobs at risk⁵.

³ United Nations World Tourism Organization (UNWTO) – Covid-19 and Tourism 2020: A year in review (2021)

⁴ Ibid.

⁵ United Nations World Tourism Organization (UNWTO) – Covid-19 and Tourism 2020: A year in review (2021)

Pandemic Wellness Tourism Trends

Domestic vs. International

As international travel has significantly slowed and the global tourism industry is left reeling in the wake of the pandemic, a shift towards domestic and regional travel can be clearly seen. Partly due to various travel restrictions which have made whatever international travel is still available more expensive, less accessible and procedure-heavy. As a consequence, and partly due to a shift in travel preference and demand, travellers are increasingly seeking wellness tourism escapes that are close to home, within their own country or even within their own city.

A Focus on the Mind

There is no question that the pandemic has undoubtedly increased overall levels of stress and fear, leaving people with greater anxiety and compromised psychological wellbeing. As a result, the demand for mental wellness services is expected to surge in the post-pandemic era, as well as a general desire for people to get out and seek escape from confined spaces and discover new ways to proactively maintain health and wellbeing, instead of simply treating disease and problems when they arise.

Health is Wealth

A world driven by capitalist ideals and unrealistic profit-seeking demands is falling out of favour, and the people who were once accepting of almost machine-level demands are now shifting the paradigm and forcing the narrative on building a better work-life balance. With a heightened awareness surrounding the importance of living a healthier life to reduce the risk of illness in people worldwide, wellness is anticipated to enter the zeitgeist in an even more significant way than any pre-pandemic pundit could have predicted.

A defining characteristic of COVID as a disease, is that it can divide, by health and not by wealth, meaning that those 'richer' in existing good health are better positioned, in most cases, to be able to overcome the effects of this disease. A drive to improve personal health will be a higher priority for many than perhaps it was before the onset of the crisis.



The Democratisation of Wellness

Before the coronavirus pandemic, the wellness economy was predicted to grow at a healthy pace for the foreseeable future, with wellness tourism seeing a projected annual growth rate between 2017-2022 of 7.5%. Yet despite the positive outlook, some concerns were already being raised that the wellness industry was still focused primarily on wealthy customers while global wealth inequality increased and the world's poorest – who are most likely to suffer from sickness, depression and premature death – were unable to access the benefits.

For many, the importance of balancing health with financial subsistence will become an increasingly mainstream topic of discussion, leading to new expectations and lifestyle changes that will likely have a dramatic effect on daily life in the near future. The wellness tourism industry, as well as other key areas of the wider wellness industry must acknowledge this new narrative and address a growing number of guests with more moderate budgets.

This may lead to a diversification within the wellness industry and a natural shift towards greater democratisation, manifesting itself in more provision of, and increased accessibility to, mid-range wellness offerings. No longer is wellness a luxury experience only for those who can afford to be pampered – wellness is now increasingly diverse, opening the doors to a range of guests who are specifically looking to travel to improve health, focusing strongly on personal wellbeing and stress-free living.



A Rise in Primary Wellness Travellers

The growth of global wellness tourism in 2021 will still be largely driven by secondary wellness travellers who seek to maintain their health and wellbeing while enjoying the experiences and offerings of any type of regular trip or destination getaway. In 2018, secondary wellness travellers accounted for 89% of all wellness trips worldwide, growing by 10% annually between 2015 and 2017⁶.

However, a rise in primary wellness travellers is also expected to emerge as more people look to travel with the sole purpose of seeking and experiencing genuine wellness at a destination that is designed and positioned to provide this.

Travelling for Wellness

International wellness tourism trips grew 12% annually between 2015 and 2017, significantly faster than domestic tourism trips. And despite domestic wellness travel dwarfing international wellness travel over the same period, international wellness trips represented a proportionally larger share of expenditures because the average level of spending for an international trip is much higher⁷. Growth rates will undoubtedly be reduced over the next few years, but a similar or larger growth rate is expected to return, notably at a faster rate than the wider hospitality industry as a whole.

This data helps support the claim that wellness has never been more important than in current times. A truly multi-faceted concept, it focuses on the pursuit of activities, choices and lifestyles that can lead to a state of good health and a sense of positive holistic wellbeing. Encompassing physical, mental, emotional, social, environmental and spiritual dimensions, wellness tourism aims to provide solutions to improving all of these foundations collectively.

Wellness as a Business Driver

As people begin to seek more experiential travel opportunities and wellness-centric experiences, the hospitality industry has a unique and much-needed opportunity to leverage wellness as a key service proposition. This can lead to the creation of better brand positioning, increased revenue generation and a more sustainable model that has the ability to better react to future crises. This change will engage and more effectively service the needs of both health-enlightened and uninitiated guests alike. The Global Wellness Institute estimates that international wellness travellers spend at a 53% premium over the average international tourist, while domestic wellness travellers spend at a 178% premium over their standard domestic counterparts⁸.

In addition, overall rising consumer interest in extending wellness experience beyond the hotel and vacation setting into the home and everyday life will continue to create opportunities for the industry, manifesting itself in a surge in wellness real estate investments and workplace wellness initiatives.

The Benefits of a Healthy Workforce

The economic burden of an unwell workforce is estimated to be at 10-15% of global economic output, factoring in medical costs, productivity losses caused by chronic disease, work-related stress, injuries, illness and disengagement. However, worldwide, less than 10% of workplace benefits include workplace wellness initiatives, with the majority of workers more concerned about their employers meeting the most basic needs⁹. Now, primary concern has understandably shifted towards job stability and workplace safety. Soon, concern will shift again to address the post-pandemic need for a maintained state of health and wellbeing, with greater demand for more comprehensive healthcare benefits and dedicated workplace wellness solutions. Needless to say, as people's expectations rise, the term "health and wellness" and the practices surrounding it will become more and more commonplace across all facets of life, and therefore, so must the offering and evolution of wellness in the hospitality sector.

⁶ & ⁸ Global Wellness Institute – Global Wellness Economy Monitor (2018)
⁷ & ⁹ Ibid



Leveraging Wellness in Hospitality

Promoting the End of Unhealthy Lifestyles

Even before the pandemic, a growing interest in healthy lifestyles, nutrition and exercise were apparent. And although human lifespans have increased over the last century, many more people live in a state of poor health, brought about by a rise in noncommunicable and chronic diseases. These diseases are overwhelming health systems and leading to a propensity for over-medication as opposed to effective lifestyle change. As a consequence, non-communicable and chronic diseases are the world's leading cause of death, and it can be said that while we have the ability to live longer and better overall, we are not taking full advantage of the wellness knowledge available to us.

Chronic disease is, and will continue to be, the number one health challenge for years to come, and some research papers have even dubbed unhealthy lifestyles that lead to chronic diseases an emerging pandemic, or at the very least endemic within modern society.

Sadly, and fortunately, many chronic diseases are preventable through a pre-diagnostic approach to maintaining good health. According to the Global Wellness Institute, at least 80% of heart disease, stroke and type 2 diabetes, as well as 40% of cancers, are directly linked to unhealthy lifestyle choices, such as sedentary behaviour, poor eating habits, smoking, poor sleep, stress and environmental pollutants¹⁰.

The coronavirus pandemic has given the world a unique opportunity to re-evaluate modern lifestyle value systems, many of which lead to unnecessarily high levels of stress, anxiety, and burnout, which weakens the body's immune system's ability to cope with health issues if and when they arise.

For the hospitality industry, this opportunity manifests itself in creating more significant wellness experiences for guests that extend well beyond the traditional spa and fitness offering. From in-room wellness amenities such as air purification filters, circadian lighting, healthy mini-bar alternatives and a more comprehensive selection of teas, waters and amenities to healthy restaurant menus, free-to-use meditation pavilions, larger green spaces, visual healing projections, and binaural music in shared spaces, the opportunities for creating a genuine wellness guest experience are almost limitless. Many of these opportunities should become standard in new and existing developments, even those that do not specialise in wellness as a specific brand pillar or service offering.

10 Global Wellness Institute – Global Wellness Economy Monitor (2018)

Tackling Loneliness Head On

Loneliness and social isolation reduce our ability to find comfort and help each other. Pre-pandemic research pointed towards a growing worldwide decline in social capital, exacerbated by varied and complex modern, individualistic, and technologically-driven lifestyles¹¹. For many, being surrounded by millions but interacting with few, can be damaging beyond expectation.

The experience and effects of social distancing, physical quarantine and lockdown requirements during the pandemic has only sped up this growing social health issue, leading to greater disconnection than ever before, with a growing emergence of major mental health consequences as a result. It can be assumed that many of these consequences are still to be fully manifested in many people who may remain unknowingly affected for years to come.

According to the Organisation for Economic Co-operation and Development, one in every two people experience a mental illness in their lifetime. The economic burden of mental ill-health was expected to grow to more than 4% of the European GDP in 2018¹², a percentage likely to have exceeded this prediction due to the pandemic and its effects on mental health.

Loneliness is one of the biggest social issues the world is facing today, and is associated with a greater risk of heart disease, depression, anxiety, dementia and premature death. Healthy relationships and social connection are integral to nurturing personal and communal wellbeing and are now more important than ever.

Hotels and resorts have a unique opportunity to provide spaces, communities and offerings which can bring people together. While international travel is yet to bounce back, the lightening of travel restrictions will inevitably lead to a wave of travellers seeking to benefit from these experiences. With a focus on creating spaces that are both communal and free of stress and pressure, a new culture of social wellness can begin to heal the wounds of social isolation within the hospitality environment.

Whether they have a focus on wellness or not, hotels and resorts that provide access to basic health resources and community-focused programming have a chance to develop more memorable and effective social and mental wellbeing experiences. These resources may include fresh and nutritious food, on-site or on-call health and welfare services, green and biophilic recreational spaces and dedicated exercise and wellness programmes. One simply used example within wellness destinations is the idea of a community table, which allows for meaningful and organic connection between guests, as opposed to mindless engagement with hand-held devices.

Bolstering the Spa Menu

As people gain a greater understanding of the serious impacts of living unhealthy lives, wellness travellers are now seeking more specialised treatments to boost immunity and gain quantifiable and data-driven wellness experiences which include preventative medicine, effective holistic therapies and cutting-edge digital approaches to the spa journey.

Treatments that are centred on maintenance and improvement of health in real terms are on the rise. These treatments can include holistic experiences such as thermal bathing, Traditional Chinese Medicine and essential oil therapies, as well as treatments that focus more on the use of technology, enhanced fitness and instantly felt or visible results.

A year of social distancing and spa closures have been devastating for an industry of professionals who make a living through therapeutic touch. Worldwide, spas and centres focused on enhancing and improving wellbeing have been forcibly closed due to the inability to adhere to social distancing regulations. However, it could be argued that these closures were actually counter-productive in providing people opportunities for improved health.

¹¹ Global Wellness Institute – *Resetting the World with Wellness: A New Vision for a Post COVID-19 Future* (2020)

¹² Organisation for Economic Co-operation and Development – *Health at a Glance: Europe 2018* (2018)



The Curative Effects of Heat

According to Dr. Marc Cohen, a pioneer of wellness and integrative medicine, enveloped viruses such as the coronavirus are sensitive to heat and are destroyed by temperatures tolerable to humans – which is why the human body uses fever to deal with infections and why humans have utilised hot springs, saunas, hammams and sweat-lodges to enhance and maintain health for millennia.

In his paper, *Turning up the heat on COVID-19: heat as a therapeutic intervention*¹³, he reviews evidence for using heat to treat and prevent viral infections. In the initial phase of infection, heat applied to the upper airways can support the immune system's first line of defence by supporting muco-ciliary clearance and inhibiting or deactivating virions where they first lodge. This may be further enhanced by the inhalation of steam containing essential oils with anti-viral, mucolytic and anxiolytic properties, and although no clinical protocols exist for using heat to treat the coronavirus, traditional practices and infection control measures based around this theory are expected to be developed and implemented rapidly and inexpensively over the next decade.

¹³ Dr. Marc Cohen – *Turning up the heat on COVID-19: heat as a therapeutic intervention* (2020) <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7372531/>

Embracing Technology

As the effects of the pandemic reverberate across the world of wellness, the ubiquitous term 'biohacking' has also re-emerged as a buzzword across the industry and is now finding its way into hospitality. Described as the fastest-growing and most significant health and lifestyle trend this side of the millennium¹⁴, the term describes the practice of hacking the body to achieve positive results both physically and mentally.

Yet despite its tech-focused name and Silicone Valley-notations, incorporating biohacking into hospitality is simpler than it looks. Nutritional provisions, such as specialised diet plans and alkaline drinking water, can help guests maintain their personal biohack regime, while more advanced offerings, such as complimentary wearable tech that provides daily biofeedback and in-room nootropic-spiked elixirs, can service the next generation of wellness travellers who are keen to push the boundaries on how far the body, the mind, and even DNA, can evolve.

¹⁴ Ingo Schweder – *Biohacking: An Inevitable Evolution of Wellness* (2020) <https://gocohospitality.com/biohacking-an-inevitable-evolution-of-wellness/>

For hotels and resorts unable or unwilling to offer such wide-reaching alternatives, an extended offering of dedicated fitness, mind & body practice and experiential wellbeing should still become a necessary cornerstone for any destination looking to take advantage of these trends. Integral to maintaining a healthy lifestyle and increasingly popular among guests of all demographics, the hospitality industry will need to continue exploring and engaging with the ever-evolving health and fitness sectors, and wellness managers will need to ensure constant innovation in these areas specifically to remain relevant and leverage opportunities when they arise.

Integrating Health & Wellness

In addition to a shift in the treatment menu, an arguably more dramatic shift is being seen from the operational side of spa offering and management. As the coronavirus pandemic first emerged, a large focus was put on ensuring touch points and surfaces were clean and sterilised – with some claims suggesting the virus could live on certain materials for days before perishing. However, earlier this year, further epidemiology research suggests that the virus's surface transmission is not a significant factor in the spread of the coronavirus and that hand washing, face masks, and eye protection should be prioritised¹⁵.

What is clear is that regardless of scientific evidence, spa guests will remain actively conscious about hygiene and sterilisation and will expect and demand it at all times. Hotels, resorts and spas will therefore be required to normalise the sterilisation process and maintain transparency around health screening protocols well after the perceived risks of the virus have diminished. This will ensure peace of mind for every visitor, something crucially important for anyone looking to seek refuge, attain relaxation, and benefit from spa and wellness treatments¹⁶.

As our recent industry report that explored the benefits of merging medical and wellness tourism through integrative wellness destinations explained, the concepts of wellness and medical tourism are becoming increasingly interwoven. Spaces traditionally known for holistic wellness programming are incorporating more diagnostics and advanced results-driven treatments into their standard offering, while medically-focused destinations are broadening their approach to health by including more holistic wellness services to complement their treatments.

As the line between health and wellness becomes increasingly blurred, and as people begin to seek pre-emptive treatments and holistic treatments and lifestyle practices that supplement their recovery, medical destinations are moving away from sterile hospital-style designs by creating relaxing stays more similar to those experienced in hotels or resorts. On the other side of the spectrum, hotels and resorts that have developed a medi-spa offering have shifted their designs to better reflect the cleanliness, results, and professionalism expected from medical establishments.

In order for hospitality destinations to effectively develop an integrated health and wellness strategy, certain key elements need to be considered. If medical therapies are offered in addition to traditional spa treatments, a team of experts or specialists will need to be hired, which in turn will affect the organisational structure due to a need for clearly defined roles for each team.

However, the benefits of offering a more comprehensive health and wellness offering have many positives if the destination is marketed correctly and can attract the right guests for their chosen service platform. With a heightened perception of risks associated with hygiene and physical contact, a balance must be established that both fulfils the need for relaxation and pampering while demonstrating a clear and trustworthy understanding of hygiene, cleanliness and medi-centric services.

Integrative wellness destinations are anticipated to become one of the most sought-after wellness hospitality establishments in the coming years, as they provide a comprehensive selection of services in an environment that is distinctly non-medical. For any hospitality company looking to expand its offering to meet the fast-growing demands born out of the coronavirus pandemic, it is recommended that a wellness consultant is hired to guide both owners and operators to create a successful venture at both design and operational levels. Without this guidance, and a detailed roadmap, then results may vary and for those who see wellness as an easy fix-all, there may be disappointment.

¹⁵ The Guardian – Clean Break: the risk of catching Covid from surfaces overblown, experts say (2021) <https://www.theguardian.com/australia-news/2021/feb/28/clean-break-the-risk-of-catching-covid-from-surfaces-overblown-experts-say>

¹⁶ Horwath HTL Health & Wellness – Merging Medical & Wellness Tourism in Integrative Wellness Destinations (2020)



Conclusion

In the wake of the coronavirus pandemic, global wellbeing is expected to remain sharply in focus both in terms of physical need and collective cultural narrative. The World Bank predicts as many as 150 million people will fall into extreme poverty by 2021 and suggests that a number of middle-income countries will see significant numbers of urban dwellers slipping below the poverty line for the first time, identifying a significant shift in the spending power of those who may have previously had the economic stability to enjoy travel and wellness tourism¹⁷.

The wellness economy's future, and specifically that of wellness hospitality, will therefore be strongly influenced by the significant global changes seen over the last year. Certainly, the predicted growth of the pre-pandemic era will take time to correct, but due to fast-growing trends surrounding health, immunity, and wellbeing, the hospitality industry is poised to see a fast recovery if the correct steps are taken.

Pairing a growing need for, and deeper understanding of, health and wellness in general with a shift in global spending patterns, the consequences of the coronavirus pandemic place hospitality in a unique position to adapt and incorporate health and wellness into the core traveller experience. Therefore, fulfilling demand for new and improved revenue generation opportunities and improving accessibility to impactful personal experiences for a wider guest demographic, must be regarded as a priority.

With more hotels and resorts adopting meaningful wellness as a key service offering, and as the industry as a whole becomes more democratised, wellness tourism growth is

very likely to exceed previous expectations despite the economic downturn, and particularly when compared to the wider hospitality landscape. It is predicted that wellness tourism will see an even greater growth rate than the pre-pandemic era by the time the global economy is truly stabilised.

Opportunity Rising from Crisis

The pandemic has shifted the goalposts for what is expected from the wellness industry and by association, the industries that interact with wellness the most, must adapt accordingly. This paradigm shift presents a unique opportunity for hospitality owners and operators to leverage the popularity and trends associated with wellness to create new profit streams, improve brand position and ensure long term stability of their product for guests, employees and stakeholders, even in the face of any future economic uncertainty.

The inevitable surge of late- and post-coronavirus era travel will emerge hand in hand with strong demand for wellness hospitality, likely exceeding all expectations. Our collective understanding of health and wellbeing has been forever changed by the pandemic, and it is this forced evolution in guest expectation that is driving a new interpretation of hospitality and more comprehensive service offerings. By thoughtfully leveraging wellness, the hospitality industry can utilise this key concept to create a new experiential and multi-layered product, helping it to become more resilient, relevant, and sustainable than in the years preceding the pandemic.

¹⁷ The World Bank – COVID-19 to add as many as 150 million extreme poor by 2021 (2020)

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Injecting fresh ideas and professional management into the rapidly expanding wellness hospitality sector, Ingo Schweder brings together more than 30 years of experience in the wellness and hospitality industries. He leads the multidisciplinary teams at GOCO Hospitality and Horwath HTL Health & Wellness to strategise, conceptualize, design and manage the latest wellness developments for the world's top hospitality and real estate brands. From individual hotel spas to dedicated wellness resorts and master planned mixed-use developments, Ingo's experience and insights have taken over 400 projects worth more than USD 3.5 billion across upwards of 42 countries from initial idea to profitable realization and on-going management.

Ingo maintains a creative lead in the management and development of all GOCO-branded spas and is the Managing Director of Horwath HTL Health and Wellness. Ingo also owns and manages Glen Ivy Hot Springs in Southern California, the United States' oldest and highest grossing hot spring resort. Ingo is a co-founder of Space Yoga & Space Cycle, together with Matthew Allison, former President of EMI Music, and Jack Ma, Founder of Alibaba. Ingo was formerly a board member of Mandarin Oriental and earlier Corporate Director of Operations for Oberoi Hotels & Resorts. Under his guidance, Ananda in the Himalayas, the globally recognised destination resort, was established.

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