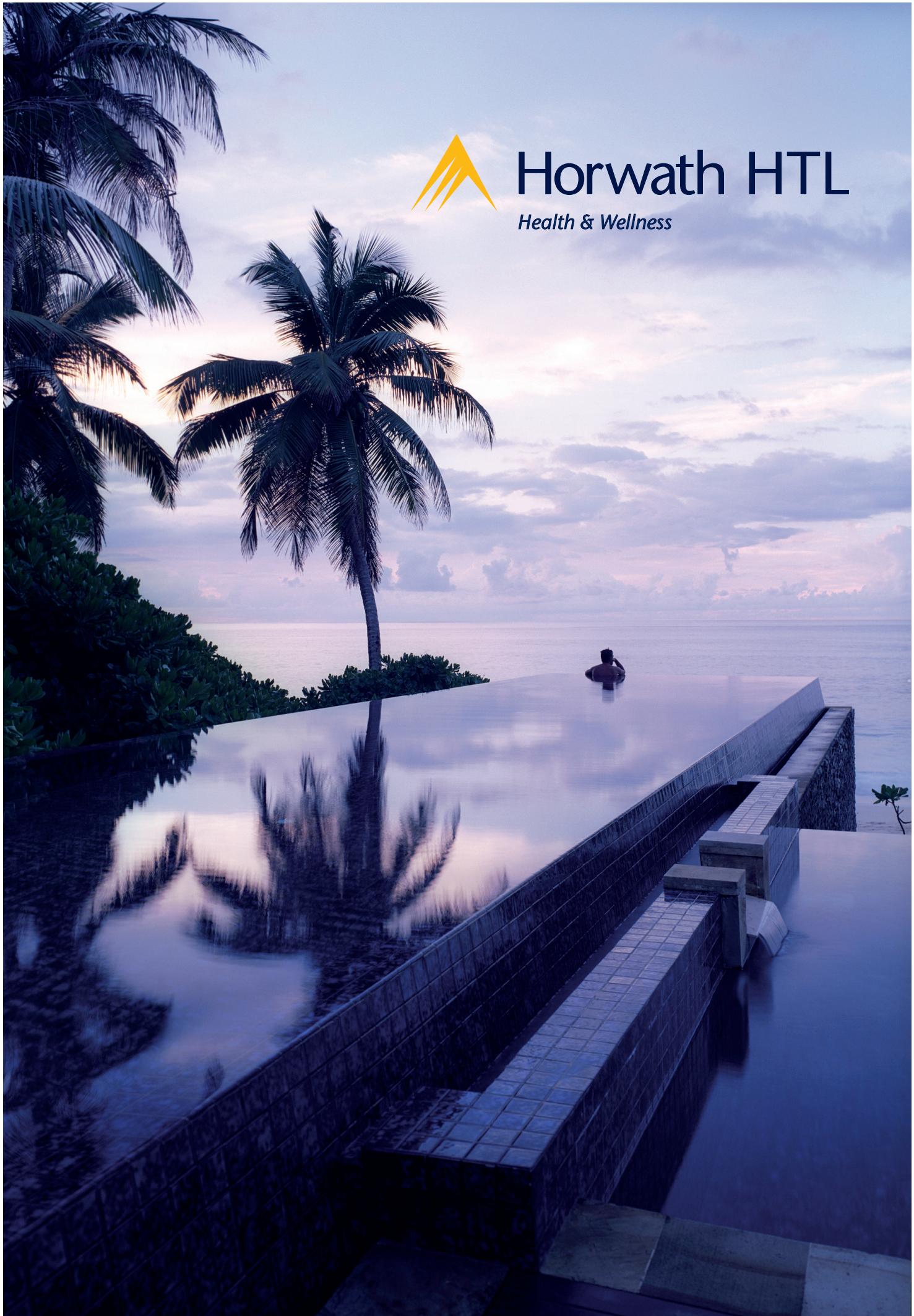




Horwath HTL

Health & Wellness



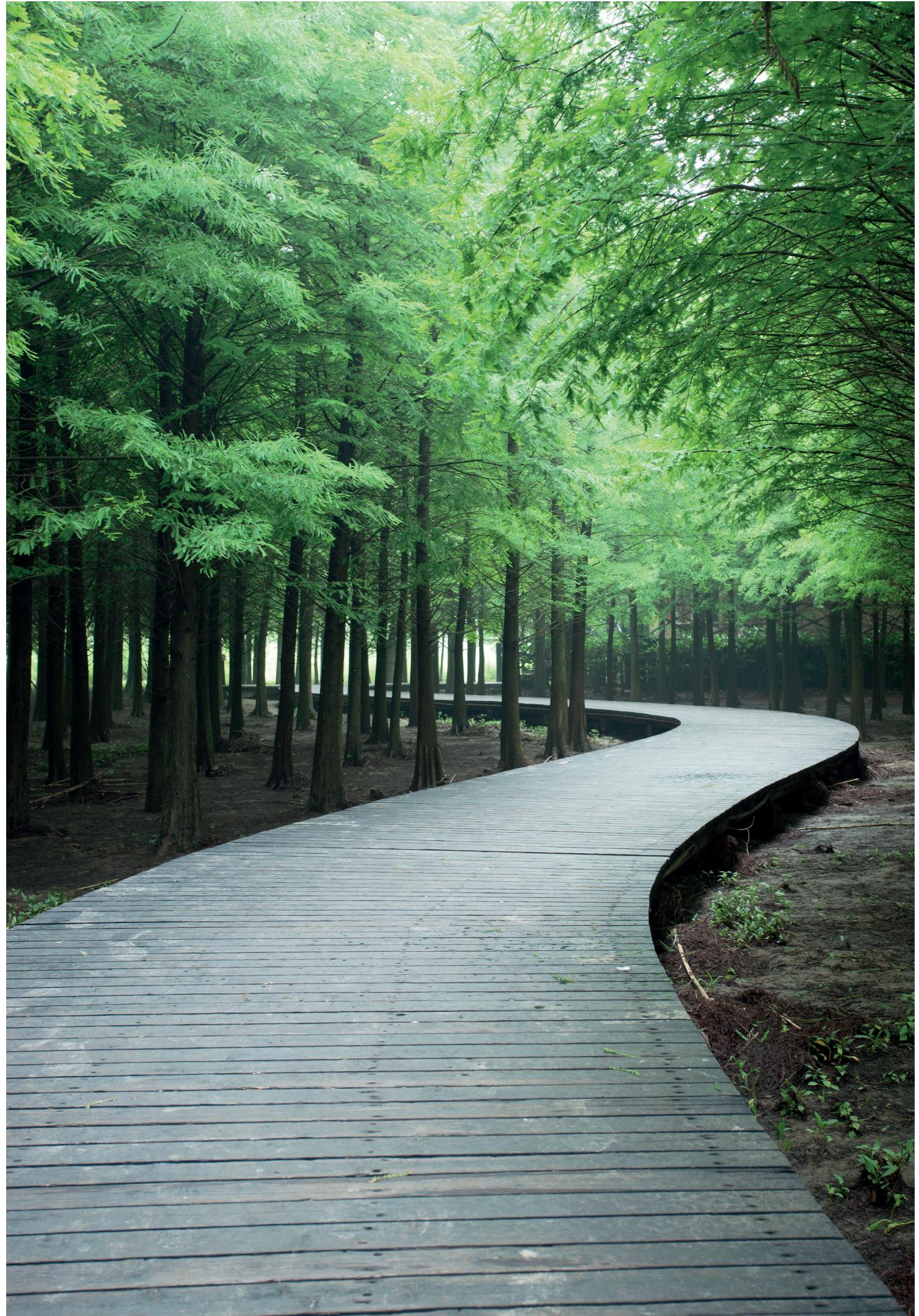


The process of developing wellness destination facilities, taking a project from a blank site to its future operation, is a complex challenge.

It requires a strong vision and the integration of financial, conceptual, design and operational aspects.

Horwath HTL Health & Wellness offers expertise in these respective fields and a sound understanding of how to merge ideas effectively and efficiently.

Ingo Schweder, Managing Director, Horwath HTL Health & Wellness



Key Services

We focus on delivering business solutions to investors, developers and operators who are considering or proceeding with Spa & Wellness projects.

Demand is rising, offering investors and developers the opportunity to earn above-market returns.

Horwath HTL Health & Wellness offers a full range of consulting services exclusively for health and wellness developments.

From preliminary market research and feasibility work to asset management and operator search, our team has the expertise to maximise a successful product.

Our experienced team provides the creativity to develop unique themes, design, service and menu touch points that turn an ordinary wellness experience into one that is distinctive and captivating.

Our Expertise

- Market Research & Feasibility
- Spa Asset Management
- Concept Development
- Strategic Advice
- Executive Recruitment

Our Experience

- Wellness Communities
- Destination Retreats
- Lifestyle & Wellness Centres
- Resort Spas
- Urban Hotel Spas
- Bathhouses
- Medical Spas
- Health & Fitness Clubs
- Day Spas



Market Research & Feasibility

There has been rapid growth in wellness tourism over the past few years, and this is expected to continue. Wellness is mainstream, with demand rising and this has meant lots of specialisation within the sector, with guest expectations becoming more sophisticated and nuanced. This requires specialists that are fully aware of how the market is developing.

Given the unique trends and consumer profile of the health and wellness market, our team offers expertise that reflects a demonstrated knowledge of global travel and tourism and the barriers to entering the highly competitive and specialised health and wellness market.

A nuanced understanding is applied to each individual project, its competitive marketplace, and an optimal positioning strategy for maximising its operational potential.

Our team of skilled researchers, analysts, and business professionals will initiate an in-depth site and competitive analysis along with a concentrated investigation of significant statistics and international development benchmarks in order to create a tailored business plan with detailed demand analysis and financial forecast for our clients.

Our Expertise

- Significant Market Statistics & International Benchmarks
- Competitive Analysis
- Positioning Strategy & Target Market
- Service Platform Recommendations & Unique Facility Features
- Marketing Strategy
- Architecture Programme Planning & Adjacency Diagram
- Demand Analysis & Financial Forecast
- Investment Analysis



Spa Asset Management

In the current marketplace, a hotel or resort spa can no longer be treated as an amenity or ‘nice-to-have’ facility. A spa needs to be treated as a core element of the guest experience that not only drives demand, but brands the property and matures to an untapped source of revenue from an ever-growing wellness economy.

Our team of spa experts will assess, explore and make detailed recommendations on how to improve spa business performance while evaluating the internal processes against the regional benchmarks.

Diagnostic Review

- Review of the Spa Facility
 - Physical Plant
 - Service Platform & Revenue Generation
 - Service Standards & Consumer Feedback
- Review of the Spa Facility’s Performance
- Conclusions & Opportunities
- Short, Medium & Long Term Recommendations
- Other Relevant Points

Ongoing Support

- Monthly Calls to:
 - Review Strategic Plan
 - Review Monthly Financial Performance
- Provide Assistance with:
 - Budget Development
 - Marketing Plan Development
 - Cap-Ex Improvement Plan
 - Menu Optimisation & Service Improvement
- 2 Visits per Year with Operational Audits
- Provide Annual Support to Spa Director



Concept Development

To succeed in the wellness sector today, it's vital to be able to stand out from the crowd and offer something that connects deeply with a specific target guest.

The wellness customer profile varies in its needs and desires, and it's important to decide which market you are going to target.

The concept is the underlying vision for a facility, which drives its unique layout, menu of services, professional product selection and service philosophy.

It is the perfect balance of creativity combined with strategic thinking and operational sensibility that determines a detailed, well-thought out concept and ensures consistency across not only each facet of the health and wellness facility development, but synergy throughout the overall property.

Horwath HTL Health & Wellness provides the creativity to develop those distinctive theme, design, service and menu touch points that turn an ordinary wellness experience into one that is distinctive and captivating.

Wellness Hotels

- Development Concept
- Positioning Strategy
- Cultural & Design Influence
- Initial Look & Feel Recommendations
- Accommodation Concept
- Food & Beverage Concept
- Human Resource Philosophy
- Wellness Concept

Spas & Wellness Centres

- Concept Statement
- Positioning Strategy
- Cultural & Design Influence
- Unique Facility Features
- Initial Look & Feel Recommendations
- Treatments & Service Menu
- Initial Professional Product Line Recommendations



Strategic Advice

In today's rapidly changing hospitality market, hoteliers and owners must adapt quickly to maximise the potential of their assets and gain competitive advantage. At Horwath HTL Health & Wellness, we possess all the knowledge of current hospitality and wellness trends and various aspects of wellness-centric developments.

Wellness is going beyond traditional hotel and resort spas and is becoming the overriding theme of large-scale community and resort destination developments at the original master planning stage.

Our team of experts can help identify a clear strategy, correctly and timely allocate resources, and work with the client's master planners and architects to provide on-going guidance and provide feedback and recommendations as it relates to wellness components of the development.

Previous experience in the planning and development of numerous projects around the world, from smaller mixed-use assignments to large-scale wellness community developments, allows us to provide a comprehensive range of advisory services.

Our Experience

- Market Entry Strategy
- Brand Strategy & Implementation
- Market Position Analysis
- Master Plan Recommendations



Executive Recruitment

Development and operation of a dedicated wellness retreat is different from a traditional hotel or resort.

Therefore, engaging a specialised wellness expert and an executive team ensures efficient and appropriate operating standards and helps with cost management, and in the long-term avoids poor asset performance.

A wellness retreat is very distinctive from a regular resort in some ways. The wellness programming is unique and varies considerably from one to another retreat, depending on the wellness retreat concept and customer profile. They, therefore, need a specialist and often hard to find skills and abilities.

The team and its leadership is one of the most important factors to the success of any spa, bathhouse, wellness centre, and wellness-centric hotel and resort. It is vital to ensure that the leadership positions have the correct skillsets and expertise to guide the team and drive profits.

Horwath HTL Health & Wellness, led by a team of hospitality professionals with multiple years of experience in developing, setting up, opening and managing hospitality establishments, offers executive recruitment to support you in identifying the best fitting candidates for your senior management wellness positions.

Our Expertise

- Senior Wellness Team Recruitment
- Selection Process
- Detailed Interviews
- Candidate Presentation

Horwath HTL Health & Wellness Projects



Active Retirement Community
Chonburi, Thailand

Overview

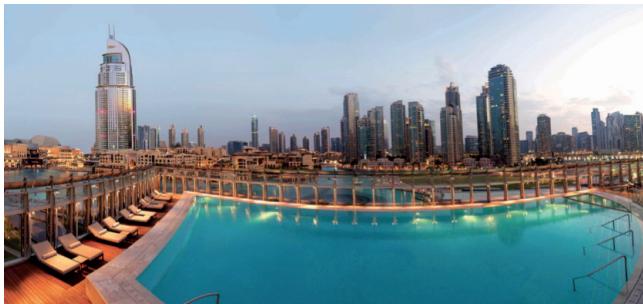
The goal of the assignment was to survey Thailand's local landscape to determine if there is demand for this type of residential real estate development and whether this type of residential area estate development is financially viable.



Wellness Retreat
Kerala, India

Overview

Horwath HTL Health & Wellness proposed a luxury wellness retreat that offers a selection of indigenous healing traditions as well as a high-tech Western wellness centre overlooking the valley, merging together Eastern and Western wellness protocols.



Women-Only Wellness Club
Dubai, United Arab Emirates

Overview

Horwath HTL Health & Wellness proposed a one-stop health, wellness and beauty solution with multiple profit centres including spa, boutique fitness, aesthetic facility, and a healthy food and beverage outlet.



Luxury Resort Spa
Maldives

Overview

Proposed a modern luxury spa facility that would include a versatile thermal area and an outdoor functional fitness park. To gain competitive advantage, we recommended developing an extensive heat and thermal circuit that includes a vitality pool, anticipating more guests from China.

Horwath HTL Health & Wellness Projects



Medical Wellness Retreat
Koh Samui, Thailand

Overview

Horwath HTL Health & Wellness proposed a targeted medical wellness retreat as part of a luxury villa development in Koh Samui. The wellness retreat is set to provide an all-encompassing health solution, using cutting-edge diagnostic technology in a luxury resort environment.



Wellness Resort
Perez Zeledon, Costa Rica

Overview

Nestled into the landscape of a 300-hectare land plot in Central Costa Rica, the development is set to become a true wellness community, featuring a boutique wellness resort, wellness real estate, retail and cultural village, multiple meeting and educational spaces, and an organic farm.



Sovereign Wealth Fund Integrated Wellness Development, GCC

Overview

Worked with the Client's team to provide initial strategy and concept recommendations for two wellness and sustainability-themed ultra-luxury developments. Proposed a contemporary, yet authentic concept with a range of different Eastern and Western treatment modalities, allowing the development to become a health and wellness destination in itself.



Luxury Spa
Venice, Italy

Overview

A luxury resort on an island in the Venetian Lagoon with 1,750 square metres of space, spread across three different buildings allocated for a spa development. Proposed a luxury spa facility that works within the historic building structures that were already onsite and supports the overall positioning strategy of the hotel.

Horwath HTL Health & Wellness Projects



Luxury Resort Spa
Miami, United States

Overview

An award-winning resort in Miami Beach with 1,300 square metres of space allocated for spa and fitness development. Proposed an array of advanced beauty services using an exclusive result-driven product line, aimed to create a loyal customer base of local female consumers.



Thermal Spring Resort
California, United States

Overview

Horwath HTL Health & Wellness proposed a concept for the expansion of a 150-year old hot spring resort in North America. The adjacent 62-acre land plot will be developed into a world-class wellness community including a boutique lifestyle resort, a wellness resort and branded wellness real estate for sale.



Luxury Hotel Spa
Tokyo, Japan

Overview

To capitalise on the strong spa and fitness membership market, Horwath HTL Health & Wellness suggested converting parts of the meeting facilities into a 'members only' lounge, allowing the hotel spa facility to offer a competitive spa and fitness membership programme.



Luxury Hotel Health Club
Shanghai, China

Overview

Proposed a concept that blends modernity with elegant Italian style of the brand. To capitalise on the growth of male grooming in China, Horwath HTL recommended a dedicated male grooming atelier, offering barber services and treatments that are formulated specifically for male skin.

Horwath HTL Health & Wellness Projects



Organic Restaurant
Benslimane, Morocco

Overview

Horwath HTL Health & Wellness proposed a village-type concept that includes a farm-to-table restaurant, an organic café, a farmers' market, a spa facility, an activity centre, and a boutique meeting and event facility to attract guests during weekdays and to extend the average length of stay during weekends.



Mixed-Use Clubhouse
HCMC, Vietnam

Overview

As part of mixed-use real estate development, Horwath HTL Health & Wellness proposed a clubhouse with multiple dining and meeting facilities. To attract an elite customer segment, the clubhouse also features a highly exclusive spa, fitness centre, and rooftop city beach that are open to members only.



Premium Day Spa
Pattaya, Thailand

Overview

The Client, a large tour-business operator, wanted to explore the opportunity of incorporating spa and beauty into its standard tour package. Horwath HTL Health & Wellness proposed a twofold day spa concept with separate areas for groups and FITs, as well as an outdoor bathing area that can be transformed into an entertainment venue at night.



Thermal Spring Resort
Weißenstadt, Germany

Overview

To countervail a pending insolvency, Horwath HTL team was assigned as strategic advisors to the lending partners of the project, analysing the status quo, re-structuring the business case and financial budget, and, eventually, turning a loss-making asset into a profit-making asset in three to six months.

**AFRICA**

Ivory Coast
Rwanda
South Africa

ASIA PACIFIC

Australia
China
Hong Kong
India
Indonesia
Japan
Malaysia
New Zealand
Singapore
Thailand

EUROPE

Andorra
Austria
Croatia
Cyprus
France
Greece
Germany
Hungary
Ireland
Italy
Netherlands
Norway
Poland
Portugal
Serbia
Spain
Switzerland
Turkey
United Kingdom

LATIN AMERICA

Argentina
Dominican Republic

MIDDLE EAST

UAE & Oman

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