



Horwath HTL™

Health and Wellness

**HEALTH AND WELLNESS
INDUSTRY REPORT - ISSUE 1**

**DESTINATION SPAS:
UNDERSTANDING THE
WELLNESS BENEFITS**



Horwath HTL Health and Wellness has prepared the following report, which serves to provide an overview of the destination spa industry.

It includes a brief history of wellness and the place of destination spas within it, the factors differentiating destination spas from traditional resorts, a case for investment in dedicated wellness ventures, critical success factors for the construction and operations of destination spas that can compete in an increasingly competitive wellness marketplace, and future considerations for destination spa development.

NOT YOUR TRADITIONAL RESORT

The global spa and wellness industry has experienced momentous growth over the past few decades, so much so that today the wellness movement is a widely recognized, accepted and respected aspect of modern life. Growing health issues associated with obesity, chronic disease, diabetes, and related societal concerns have alerted individuals, businesses, and governments across the globe to the importance of promoting positive wellness awareness, maintenance, and resources.

Thus, in response to a mounting wave of need and demand, the global wellness tourism economy has grown into an estimated USD \$438.6 billion market, as of 2013, projected to demonstrate an annual growth rate of more than 9% (nearly twice that of overall global tourism) through 2017, at which point the industry's forecasted value will reach USD \$678.5 billion (SRI International and Global Spa & Wellness Summit, 2013).



The Oxford English Dictionary traces the roots of the word wellness, designed to dichotomize the term illness, back to the 1650s. While it wasn't until the 1970s that the Westernized term and movement is considered to have truly taken off, traditions surrounding health, healing, and broadly defined notions of wellness can be traced back to ancient civilizations spanning the globe, from Greek and Roman bathing and variations thereof to the Arabian use of medicinal plants and minerals to thousands of years of traditional Chinese medicine (commonly referred to as "TCM") and Indian Ayurvedic practices. It goes without saying that countless other societies and cultures have developed their own interpretations of medicine, massage, psychological well-being, and other approaches to healing over the years, several of which have played some role, be it large or small, in our current wellness environment. Thus, wellness principles and practices are by no means a recent invention, though the destination spa as we know it could be considered one of our most modern interpretations (Zimmer, 2010).

In the 1940s Rancho La Puerta, the facility commonly recognized as the first modern dedicated destination spa, a term which is often interchangeably used with wellness retreat and health resort, launched a niche wellness market that would evolve into an expansive network of first-class comprehensive wellness-focused facilities spanning the globe. Since then, destination spas have solidified an identity clearly differentiated from their traditional resort counterparts, which presents substantial opportunity for future investment and innovation.

THE EVOLUTION OF WELLNESS

In the late-19th/early-20th centuries, well-known health reformer Dr. John Harvey Kellogg made various contributions to developing mainstream understanding of the concept of wellness. Kellogg, co-inventor of corn flakes, oversaw a popular health clinic in the United States where patrons followed a strict regimen of healthy eating, regular enemas, hydrotherapy, physical exercise, and abstinence from coffee and alcohol (all referred to by Kellogg as "biologic living") while receiving an education on following the path to health. In the decades that followed, Dr. Halbert Louis Dunn began developing mainstream awareness of the actual term wellness. Offering a clear definition of "high level wellness" and identifying its various dimensions, Dunn promoted a holistic approach to wellness, which he promoted as a continuum influenced by self-knowledge and personal responsibility (Miller, 2005).





Around the time of Dunn’s research and publications, what is commonly considered to be the world’s first dedicated destination spa, generally distinguished from more traditional bathhouses and health resorts by set wellness programming with anticipated results, a communal environment, and strong educational element, was coming into existence. Rancho La Puerta unofficially began the summer of 1940 in Baja California, Mexico, when the founder, Edmond Szekely, and his wife, Deborah, invited family and friends to visit for a summer of physical activity, healthy eating, and experimental curative treatments. Humble beginnings necessitated that guests sleep in tents and work on the organic farm, a practice that continues to this day. Now, over 70 years later, Rancho La Puerta boasts luxurious amenities, a world-class cooking school, and extensive internationally benchmarked spa treatments and services (Rancho La Puerta, 2014).

The 1970s marked the beginning of the wellness movement and the years that followed ushered in volumes of wellness-related research and literature, an expanded appreciation for preventative medicine, greater cross-integration between Eastern and Western modalities, and a wave of consumer enlightenment pertaining to personal health and well-being.

Around the turn of this century, the concept of wellness had begun to more broadly encapsulate notions of cosmetic beauty and modern technologies, as destination spas with a strong medical focus earned positive reception from consumers increasingly looking to receive traditional and holistic as well as diagnostic and medical treatments, all within one facility. Among the most notable of these medically-focused facilities, Chiva-Som International Health Resort, located in Thailand, opened in 1995 as one of the first destination spas established in Asia and well known today for its comprehensive medical services, programming, and facilities. Italy’s Palace Merano Espace Henri Chenot was originally opened in 1906 as the Palace Hotel and later renovated and repositioned in the 1990s to become a leading luxury spa and wellness center providing guests with integrated wellness programming and advanced medical offerings. India’s legendary Ananda in the Himalayas opened soon thereafter, in 1999, located at the foothills of the Himalayas (birthplace of India’s yogic tradition) and solely dedicated to the age-old practices and techniques of Ayurvedic medicine, including its elaborate system of diagnosis and treatment. And in 2008, Spain’s SHA Wellness Clinic opened as one of the world’s most contemporary luxury medical resorts, inspired by Founder Don Alfredo’s firsthand battle with illness through natural therapies and macrobiotic diet and his strong desire to share his experience with others via “a unique place where ancient Eastern techniques would be fused with the latest Western medical advances – the aim being to benefit health, well-being and beauty” (SHA Wellness Clinic, 2014).

Today's destination spa landscape features a mix of modalities and specializations, modern facilities offering cutting-edge technology and results-driven programming alongside carefully mastered ancient techniques, expansive amenities, stunning architectural design, inventive nutrition concepts, world-class service, and recognized professionals. Moreover, a precedent has been set by the world's leading destination spas, which have firmly established the bridge between wellness and luxury and, as such, consumers now expect that industry leaders and aspirational entrants will deliver first-rate wellness offerings in five-star environs.

WHAT SETS DESTINATION SPAS APART

Destination spas as we know them today are facilities built upon the concept of total wellbeing, in which the main goal is to promote the achievement of both physical and mental health goals through targeted spa treatments and services as well as health and wellness education, which could include but is certainly not limited to tailored fitness training, cooking courses, and theoretical instruction.

Typically, destination spa goers will purchase wellness packages inclusive of accommodation as well as a set selection of spa treatments and services, meals, and activities. These packages are designed to target a specific health goal, such as weight loss, detox, tobacco cessation, relaxation, or yoga mastery. Upon arrival, the guest will sit down with a health professional in order to conduct an in-depth consultation, addressing exactly what is recommended over the course of the program in order for them to best achieve these goals. It is customary for programming to be tailored to a particular guest's needs or preferences, including the decision to forego particular offerings or to purchase supplementary offerings a la carte. Additionally, professional recommendations regarding spa treatments/services, fitness, and/or diet will often be taken into consideration as well. Thus, packages are often subject to change and serve as a starting point for destination spa goers to craft individualized programs tailored to their own unique needs and demands.

Given the results-driven nature of destination spas, establishments will often require that guests stay a minimum of three nights, strongly recommending a stay of seven nights or more in order to promote the full range of benefits. Additional guidelines are often administered as well, which may pertain to alcohol consumption, smoking, technology usage, and under-aged guests, all of which seek to ensure that each guest is given the best opportunity to achieve their optimal results. However, in addition to such guidelines and similarly geared towards promoting results, many destination spas also attempt to create a communal environment where guests can share their experience and offer moral support and encouragement to one another. Thus, communal dining areas, open spaces for socializing, and group activities are common features of destination spas for just this reason.

Nutritional meals are an integral part of the destination spa offering, not only because diet is central to health and wellness but because a destination spa's F&B concept, like any traditional hotel or resort, will encourage overall guest satisfaction, repeat visitation, and positive media attention. These outlets are largely healthy and able to accommodate the specific dietary needs of program guests while still maintaining a positive and often pleasantly surprising (versus wholly restrictive) experience for the guest. However, because destination spas vary in that some are program-only while others sell rooms without requiring program participation, F&B concepts and offerings will vary accordingly. Those outlets dedicated to healthy food may feature wellness concepts centered on raw, vegetarian, and/or macrobiotic cuisine.



In sum, in order to meet the expectations and needs of guests, destination spas must be operated differently than typical resorts. The differentiating factors of leading destination spas often include the following:

- They seek to deliver experiences and targeted health results rather than simply a room or product.
- They focus the guest's attention on improving his/her physical, emotional, and mental health.
- They provide the company of like-minded people, encouraging guests to interact and fostering an environment that promotes dialogue, while, at the same time, encouraging guests to focus on themselves and enjoy the space and time they need to privately reflect.
- They offer education via workshops, lectures, seminars, trainings, and other experiences.
- They promote long-term lifestyle habits, skills, and knowledge.
- They strive to provide continuity of service in order to maximize the guest's long-term experience through increased attention to employee retention.

As a result, destination spas often achieve higher guest repeat visitation rates as compared to traditional hotels and resorts. It is not uncommon for global destination spas to realize a guest repeat visitation rate ranging between 40% and 50%, as guests will regularly reserve their next year's stay upon checkout. Furthermore, SRI International and the Global Spa & Wellness Summit (2013) have reported that wellness tourists tend to be high yield travelers, spending 65% more than the average tourist on international trips and 150% more than the average tourist on domestic trips. Destination spas observe an average daily spend per guest ranging from USD \$400 to \$1,000, depending on the geographic location; variances in target market, specifically their views towards wellness and beauty; staff engagement levels; facility size and availability of treatment spaces; on-property marketing; and so on. With prices ranging from USD \$300 to \$600 per night, stays averaging from 3 to 14 nights, a daily average of 60 to 100 guests, and the primary spend of guests taking place on property, it is clear that the profitability and revenue streams of destination spas will differ from that of traditional hotels and resorts.



A CASE FOR ACTION

Over the past decade, rising health and related societal concerns have alerted individuals, businesses, and governments to the importance of wellness. Chronic diseases, such as heart disease, stroke, and some cancers, many of which have been linked to a more prosperous Westernized lifestyle of convenience eating and sedentary employment, are the world's leading cause of mortality, killing 17 million people in 2011 (World Health Organization, The Top 10 Causes of Death, 2013).

Today nearly 10% of the world's adult population suffers from diabetes (SRI International and Global Spa & Wellness Summit, 2013) and obesity worldwide has nearly doubled since 1980. By 2015, approximately 2.3 billion adults are predicted to be overweight (World Health Organization, Obesity and Overweight, 2013), and over the next 20 years the impact of the obesity epidemic and the spread of non-communicable diseases is forecast to cost more than USD \$30 trillion (World Economic Forum and Harvard School of Public Health, 2011).

Furthermore, the psychological effects attributed to today's modernized lifestyle, such as increases in workplace stress, depression, and other major mental health issues, have introduced a new category to the list commonly referred to as "diseases of affluence."

Given the general trend towards an aging of the global population, in which people are living longer due to increased access to health care among various other explanations, the proportion of the world's population over 60 years of age is forecast to double between 2000 and 2050 (SRI International and Global Spa & Wellness Summit, 2013). Thus, increased incidences of the aforementioned health concerns are forecast to rise with the population.

These concerns have stimulated a global conversation about the need to shift from a solely reactive to a more balanced proactive approach to health care. As such, increasingly health-conscious consumers with greater access to an assortment of health-related resources, ranging from the alternative and holistic to diagnostic and medical, are becoming more and more empowered to pursue preventative lifestyles via assorted approaches. Growth across the wellness tourism industry, as noted above, demonstrates that consumers are making significant investments into perceived health and wellness solutions, of which destination spas are among the most considerable one-time investment.



CRITICAL SUCCESS FACTORS FOR DEVELOPMENT

Given the unique offerings of a destination spa, which clearly differentiate it from traditional hotels and resorts, it stands to reason that the critical success factors necessary for the development of a destination spa would be similarly differentiated. Horwath HTL Health and Wellness consulted experts specializing in the design, operations, and management of health and wellness-based projects to determine key critical success factors requiring consideration with regards to master planning and design, operations, training and staffing, and sales and marketing:

MASTER PLANNING AND DESIGN

- Unlike traditional resorts that rely on location as a primary draw for guests, destination spas possess greater internal appeal (such as programming, facilities, services, specialists, F&B, activities, etc.) and, thus, have greater flexibility to be located on sites, which may not be ideal for other types of resort developments that cannot promise the inclusion of additional attractive features, such as golf courses. What is of greater concern is that the site of a destination spa be conducive to relaxation and health improvement; therefore, factors such as air quality, water quality, and future developments in the surrounding area must all be taken into consideration.

- All key facilities and components must be included in order for programming to be successful. Shortcuts cannot be made if the true intent is to develop a competitive, internationally benchmarked, revenue-generating destination spa.
- Today's busy travelers have less time to spend en route to their destination and are, therefore, looking to stay closer to home for shorter, yet more frequent, vacations. Thus, connectivity becomes a critical factor for destination spa goers, as evidenced in the 2014 Trends Report released by Spafinder Wellness 365, which highlights the trend towards "the new urban-close wellness retreat" located just outside major urban centers and within close proximity to key airports.
- The entire property must be designed with human scale in mind. Guests must be able to intuitively and comfortably flow from one area to the next with ample space (both indoor and outdoor, if possible) for relaxation and private reflection.
- More and more, hospitality projects are employing triple bottom line strategies and environmentally conscious building practices wherever possible. Energy conservation, locally sourced materials and talent, and attention to carbon footprint are some of the more commonly recognized and employed considerations, though new sustainability efforts, designs, and technologies are constantly entering the marketplace.

OPERATIONS

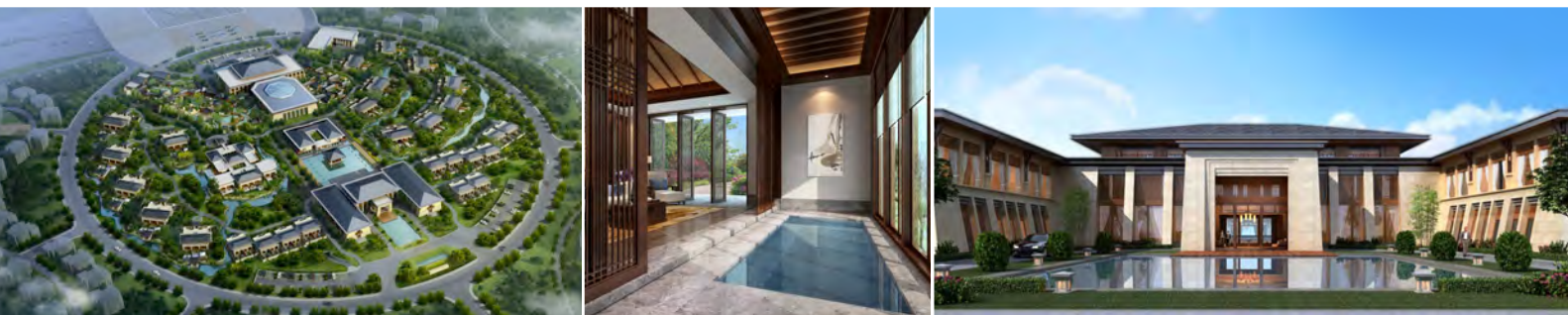
- Wellness retreat packages commonly include accommodation, three meals per day, spa services, and access to wellness facilities, such as thermal and bathing experiences.
- Operation of a destination spa is about selling programs and not guest room nights; the profit potential lies in the wellness programs. In fact, many destination spa operators will assert that shortcuts in this area are virtually impossible, as dedicated package and casual a la carte guests will not comeingle well for obvious reasons. Therefore, a successful destination spa would do well to focus on the sale of packages so as not to dilute the efficacy and, ultimately, the reputation of the programming.
- Total synergy is required between the wellness, rooms, and F&B divisions, wherein the rooms and F&B divisions play a largely supportive role in the delivery of a comprehensive, fine-tuned wellness experience, which should be at the forefront of all operations activities.
- Destination spas have the largest opportunity to increase average spend per guest by offering innovative, unique, and targeted wellness facilities and services, as this is where competitive advantage is created (versus F&B and rooms, which are limited by how much a guest can eat and sleep). Thus, retail and education are important for communicating how a guest can benefit from a particular treatment, service, and/or product.
- Wellness retreats often have a focus on healthy cuisine and, in many cases, follow specific dietary principles. This requires seamless integration and preparation by the F&B department and strong contributions of knowledge and support from the chef and team.

TRAINING AND STAFFING

- All team members and employees, from spa to F&B to housekeeping, need to understand the full wellness offering in order for the property to be successful.
- Building a successful team requires a significant amount of cross training.
- Employees need to be able to assist guests with bookings, coordinate their meals appropriately, and, most of all, respect the guests' individual healing periods with authenticity and respect.
- Team members should live and breathe wellness, though this will look different for everyone. Health and wellness activities should be encouraged and supported by the wellness retreat among its employees wherever possible in order to aid in the buy-in and knowledge-building process.
- Limited employee turnover leads to increased continuity of service and improved guest service overall, which plays a major role in increasing repeat visitation rates, as spa goers are known to be dedicated repeat visitors to properties they enjoy and trust.

SALES AND MARKETING

- The local heritage and culture must be embraced as a central part of the branding. This message must be carried across all marketing efforts and materials.
- Drive PR through established yet niche wellness travel agencies and luxury wellness travel journals, as it is important for the destination spa to receive media attention as an exclusive, distinct experience.
- Hire a dedicated marketing and communications team with satellite offices in hub cities.
- Hire a dedicated marketing team member who can oversee social media marketing and promote a strong online presence. It is especially critical to maintain a user-friendly, up-to-date website featuring detailed information, as destination spa goers will, on average, conduct extensive online research on programs, packages, and offerings. While approximately 26% of bookings at traditional hotels and resorts occur via official websites (TravelClick, 2012), this number is believed to be closer to 40% at wellness retreats.



LOOKING AHEAD

FUTURE CONSIDERATIONS

Relative to the ancient thousand-year-old practices of TCM, Ayurveda, and thermal bathing, destination spas, much like the term wellness, are considerably new to the health and healing landscape. However, growth of the wellness tourism industry over the last decade and increasing numbers of destination spas across Europe, North America, Asia and beyond since Rancho La Puerta's humble beginnings demonstrate that destination spas have been ardently embraced by an increasingly health-compromised, health-conscious population. The challenge will be for destination spas to continue adapting to and growing with the ever-evolving health environment and a more discerning wellness consumer. Given recent wellness, travel, and hospitality trends as well as general industry observations, Horwath HTL Health and Wellness believes that destination spas would do well to consider the following for the future:

- Wellness travellers, like most travellers, will be looking to do more with less. This means greater outcomes despite shorter stays, which may be delivered through supplemental and add-on programs that maximize results within a limited timeframe. This also means that travellers will be looking to access destination spas closer to home, so as to maximize limited travel time.
- Families will seek wellness together. Thus, multigenerational groups made up of families with small children as well as aging elders will be looking to have their full range of needs met in a genuine wellness-focused cum family-friendly environment.
- Increased authenticity will be valued as a premium offering, including but not limited to the employment of locally-sourced talent, products, and wellness traditions; the wellness qualifications and credibility of team members; and sincere attention to the spa's greater environmental impact.
- The wellness industry has begun to recognize the issue of talent scarcity, namely as it relates to hiring and retaining skilled team members capable of delivering internationally benchmarked service at a luxury standard. Given the intensely intimate nature of health and wellness services, particularly as evidenced at destination spas, securing the right talent will be of paramount importance in determining long-term success. Thus, training and long-term retention must be a high-priority future consideration.

UPCOMING DEVELOPMENTS

Given the considerable investment that goes into developing a dedicated world-class destination spa, openings are not a routine occurrence. Thus, upcoming destination spa developments scheduled for opening in 2014/2015 are limited and certainly newsworthy:

- The GOCO Retreat | Niutuo, a comprehensive wellness retreat located less than an hour from Beijing, is scheduled to open in mid-2015. Spanning 100,000 square meters in total, the retreat is slated to feature 55 villas offering private mineral hot spring bathing, an integrated wellness facility with diagnostic and medi-spa services alongside more traditional TCM and Western spa offerings, expansive ballroom and meeting facilities, and varied F&B outlets. Adjacent to the retreat and under the same management will stand a comprehensive 11,000 square meter indoor/outdoor mineral hot spring bathhouse with elaborate aquatonic bathing experiences, all of which will be fully accessible to guests of the GOCO Retreat. The development is an envisioned re-creation of the historic tradition whereby Chinese emperors of the Ming and Qing dynasties would travel to this very mineral hot spring site, found along what was then referred to as “The Emperor’s Road,” in order to ‘take the waters’ and enjoy their healing and regenerative benefits (Gu'An Urban Planning Exhibition Hall, 2012).

WRITTEN BY:



JENNIFER WILSON

Horwath HTL Health and Wellness,
Thailand
email: jwilson@horwathhtl.com

As a Manager for Horwath HTL Health and Wellness, Jennifer is responsible for the development and delivery of wellness-based market research and feasibility studies for projects ranging from wellness communities and destination and resort spas to bathhouses, urban hotel and medical spas, and health clubs. Additionally, she oversees all marketing and communications-related activities, including the production of wellness-based industry reports. Jennifer holds a Masters in Business Administration from the University of Denver, USA, with a concentration in International Business.



OLIVIER BOPPE

Horwath HTL Health and Wellness,
Thailand
email: oboppe@horwathhtl.com

As a Consultant for Horwath HTL Health and Wellness, Olivier is responsible for conducting market research analysis and drafting feasibility studies for wellness-based hospitality projects. His specializations include financial forecasting, investment analysis, and development strategizing. Olivier holds a Bachelor of Science in International Hospitality Management from the Ecole Hôtelière de Lausanne, Switzerland, with a concentration in Finance.

Horwath HTL Health and Wellness

37/10 Soi Langsuan Phloen
Chit Road Lumpini
Pathumwan Bangkok
10330 Thailand

Tel: +66 2 252 6281

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ASIA PACIFIC

AUCKLAND, NEW ZEALAND
auckland@horwathhtl.com

BANGKOK, THAILAND

Matthew Brennan
mbrennan@horwathhtl.com

BEIJING, CHINA
beijing@horwathhtl.com

HONG KONG, SAR
hongkong@horwathhtl.com

JAKARTA, INDONESIA
jakarta@horwathhtl.com

KUALA LUMPUR, MALAYSIA
kl@horwathhtl.com

MUMBAI, INDIA
vthacker@horwathhtl.com

SHANGHAI, CHINA
shanghai@horwathhtl.com

SINGAPORE, SINGAPORE
singapore@horwathhtl.com

SYDNEY, AUSTRALIA
jsmith@horwathhtl.com.au

TOKYO, JAPAN
tokyo@horwathhtl.com

AFRICA

CAPE TOWN, SOUTH AFRICA
capetown@horwathhtl.com

EUROPE

AMSTERDAM, NETHERLANDS
info@horwathhtl.com

ANDORRA LA VELLA, ANDORRA
vmarti@horwathhtl.com

BARCELONA, SPAIN
vmarti@horwathhtl.com

BUDAPEST, HUNGARY
mgomola@horwathhtl.com

DUBLIN, IRELAND
ireland@horwathhtl.com

FRANKFURT, GERMANY
rknospe@horwathhtl.com

ISTANBUL, TURKEY
merdogdu@horwathhtl.com

LISBON, PORTUGAL
vmarti@horwathhtl.com

LONDON, UK
eheiberg@horwathhtl.com

MADRID, SPAIN
vmarti@horwathhtl.com

MOSCOW, RUSSIA
mohare@horwathhtl.com

OSLO, NORWAY
pewinther@horwathhtl.com

PARIS, FRANCE
pdoizelet@horwathhtl.com

ROME, ITALY
zbacic@horwathhtl.com

SALZBURG, AUSTRIA
gkroell@horwathhtl.com

WARSAW, POLAND
jmitulski@horwathhtl.com

ZAGREB, CROATIA
scizmar@horwathhtl.com

ZUG, SWITZERLAND
hwerhle@horwathhtl.com

NORTH/CENTRAL AMERICA

ATLANTA, USA
mbeadle@horwathhtl.com

ATLANTA, USA
pbreslin@horwathhtl.com

ATLANTA, USA
pgrayboff@horwathhtl.com

DALLAS, USA
jbinford@horwathhtl.com

CHICAGO, USA
tmandigo@horwathhtl.com

DENVER, USA
jmontgomery@horwathhtl.com

LOS ANGELES, USA
ynathraj@horwathhtl.com

LAS VEGAS, USA
lboll@horwathhtl.com

MONTREAL, CANADA
pgaudet@horwathhtl.com

MEXICO CITY, MEXICO
mjgutierrez@horwathhtl.com

NEW YORK, USA
sdavis@horwathhtl.com

PHOENIX, USA
jreigle@horwathhtl.com

SAN FRANCISCO, USA
jhiser@horwathhtl.com

DOMINICAN REPUBLIC
sotero@horwathhtl.com

TORONTO, CANADA
horwath@horwathhtl.com

SOUTH AMERICA

BUENOS AIRES, ARGENTINA
mcarrizo@horwathhtl.com

SÃO PAULO, BRAZIL
mcarrizo@horwathhtl.com

SANTIAGO, CHILE
cspinelli@horwathhtl.com

BOGOTA, COLUMBIA
mjgutierrez@horwathhtl.com