

STRATEGY & DEVELOPMENT ADVISORY SERVICES

OUR TOURISM AND HOSPITALITY CAPABILITY

"WE ARE A FIRM OF PASSIONATE TOURISM EXPERTS PROVIDING PRACTICAL AND REALISTIC TOURISM SOLUTIONS FOR OUR CLIENTS. OVER 35 YEARS WE HAVE DEVELOPED AN IN-DEPTH UNDERSTANDING OF THE TOURISM INDUSTRY, ITS ROLE PLAYERS, STATISTICS AND TRENDS. WE UNDERSTAND THE IMPLICATIONS OF THESE TRENDS AND FACTOR THEM INTO OUR UNIQUE MODELS AND SOLUTIONS INCLUDED IN THE HUNDREDS OF TOURISM PROJECTS WE'VE CONDUCTED INTERNATIONALLY AND IN SOUTH AFRICA."

OUR TOURISM CAPABILITY

Our capability is rooted in our experience and depth of knowledge accumulated over

35 years of dedicated tourism and hospitality advisory.

Since 1985, our team of tourism experts have provided unrivalled services and insights to our clients in all sectors of the tourism industry across the African continent.

We have been fortunate to play a significant role in the growth and development of an industry we are passionate about. We are proud of the relationships we have cultivated with our

public and private sector clients, strategic partners and industry associations and will continue to journey with the industry as it aspires towards greater success.

We have a wealth of experience that delves into the essence of Africa's local and regional markets which further enhances our ability to assist our clients in navigating their way through the challenges faced in the wake of changing economic climates.

Together with our BDO colleagues, you can be confident that every project you undertake will be supported by both global reach and local expertise.



1

What you can expect from us

- Client-centric solutions tailored for your needs
- An insights-driven decision-making process
- In-depth understanding of the segments in which you operate

2

Our customised solutions

Some of our key services

- Feasibility studies, market analysis, financial evaluations and business plans
- Project conceptualisation, planning, implementation and appraisal
- Valuations & due diligence
- Market research
- Strategy formulation & reviews
- Economic impact studies
- Quality assessment and grading

3

The clients we work with

- Public & private sector organisations
- Promoters/developers
- Owners
- Financiers, including Development Finance Institutions
- Small & large businesses
- New as well as established operators
- National, provincial & local government, tourism authorities

4

The value chain: the sectors we cover

- Tourism planning and development
- Tourist accommodation
- Tourism transport – air (airports & airlines), road transport, rail transport, water transport (cruising & boating)
- Tourist attractions
- Casinos & gaming
- Meetings, incentives, conferences & exhibitions
- Sports & events Food services and catering
- Travel & tourism services
- Culture, heritage and leisure
- Entertainment
- Tourist retail/shopping

SOME KEY PROJECTS

Tourism

- Kenyan National Tourism Strategy 2030
- Provincial Tourism Events Strategy for North West Province
- Marine Tourism Strategy on behalf of South African Maritime Safety Authority



Hospitality

- Numerous market & financial feasibility studies for hotels, lodges and resorts across Africa including Angola, Benin, Botswana, Cape Verde, Cameroon, DRC, Eswatini (formerly Swaziland), Ethiopia, Ghana, Kenya, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Nigeria, South Africa, Tanzania, Zambia and Zimbabwe
- Feasibility and due diligence support to various hotel groups including Accor, African Sun, Peermont, Kingdom, Hilton, Hyatt, Radisson, Taj, Legacy, Marriott, Protea, City Lodge, Onomo, Sheraton, Sun International and Oberoi



Meetings, Conferences, Sport & Events

- 3-year appointment by Ethekwini Municipality to conduct event socio-economic impact assessments (2016-2019)
- Economic Impact Assessment report for the British & Irish Lions Rugby Tour to South Africa in 2021
- Numerous feasibility studies for conference centres

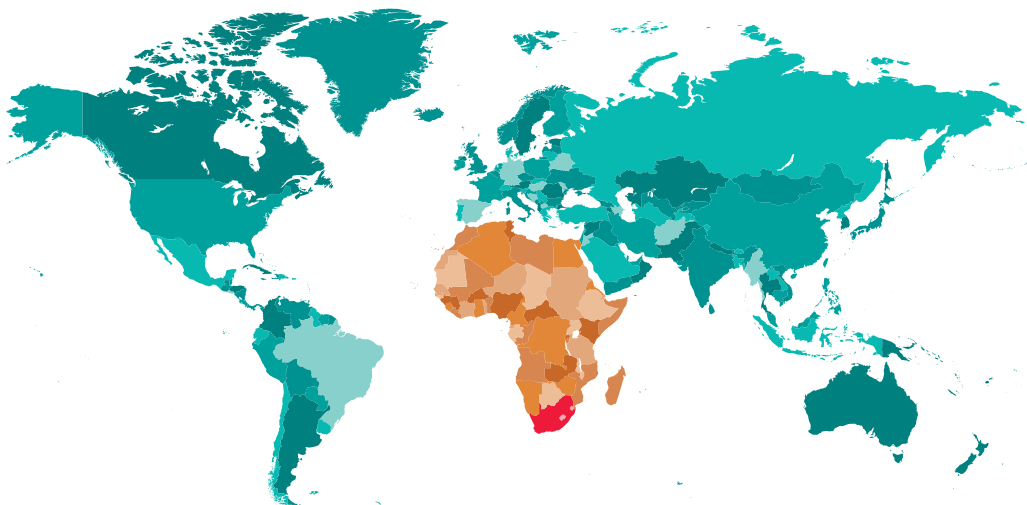


Transport

- Feasibility study for cruise liner business
- Analysis of the cruise industry value chain in South Africa
- Airlift strategies for the provinces of Mpumalanga, Limpopo, KwaZulu-Natal and Northern Cape
- Feasibility studies for airports in South Africa (Cape Town, Polokwane, Mthatha, Durban, Mpumalanga), Zambia and Botswana



OUR PRESENCE



In South Africa

- You will find us in Cape Town, Durban, Johannesburg, Port Elizabeth, Pretoria, Roodepoort and Stellenbosch. We also have satellite offices in Nelspruit, Polokwane and Rustenburg.

On the African continent

- Our footprint on the African continent gives you access to 29 territories through our member firms, and an additional 27 through our independent referral firms

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BDO INTERNATIONAL

US\$9 billion
2018 REVENUE
10.7% increase over 2017

162
Countries &
Territories

1,591 Offices
80,087 Staff

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