



# PwC Indonesia Tourism Capability Statement



November 2021

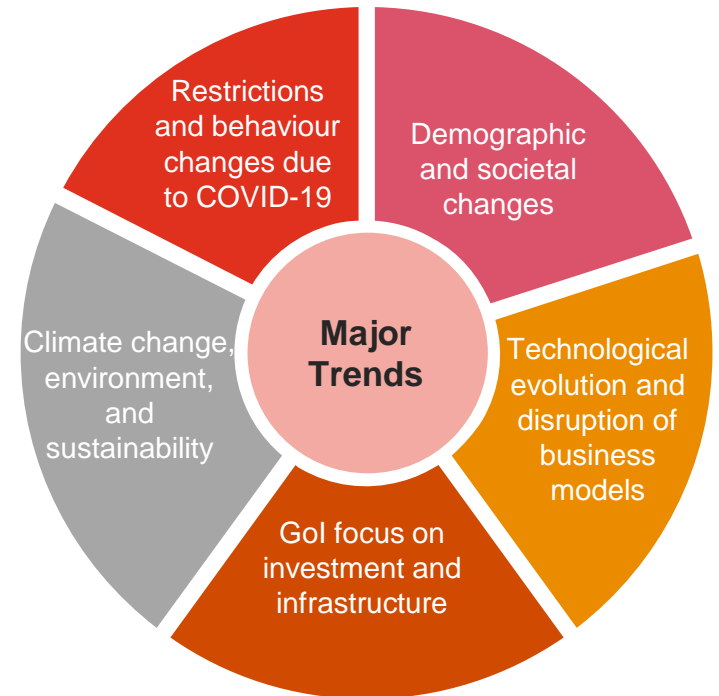


With the largest multilingual population in the world, 260 million inhabitants and a rich cultural and natural diversity, **Indonesia has great potential for businesses in the tourism industry**. In this context, the government of Indonesia has been prioritising the tourism sector, including an international promotion under the tagline Wonderful Indonesia.

**At the same time, the tourism sector is facing various challenges and must adapt to changing trends and consumer behaviour.** The sector is dependent on consumer confidence and business sentiment and is facing increasing pressure to deliver innovation, quality and value. Tourism authorities and industry players can only meet the challenges and opportunities of today's global market by adopting strategies to address environmental and social factors (ESG), consumer trends, economic conditions, technology, competition and concerns for public safety.

**PwC helps identify global trends and advise on innovative ways to respond to challenges and leverage opportunities.** The expertise of PwC tourism specialists drives our analyses and conclusions, and helps us deliver industry services that are visionary, but achievable, to help our clients manage myriad challenges their organisations face.

Our expertise is dedicated to supporting the Indonesian government, ministries, regional governments, state owned enterprises, international development agencies, and private sector in their tourism transformation journey and to keeping Indonesia wonderful.



Our Services

Our Credentials

Our Publications

Our Team

Why PwC



# Our Services

## Our Services

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Why PwC

### *Tourism & Destination Services*

- Integrated tourism destination master planning
- Strategic planning for top destinations
- Sustainable destination management
- Governmental tourism funding strategy
- Destination investment strategy and implementation
- Market research and forecasting
- Digital transformation & distribution alignment

### *Operations Services*

- Strategy and operations consulting
- Brand assurance including SOP design, standardisation, and control
- Operational audits
- Financial and forensic audits
- Internal audits
- Human capital development
- Business, experience, technology (BXT) digital transformation
- Revenue optimisation

### *Asset Services*

- Integrated touristic infrastructure planning
- Feasibility studies, market studies, and/or valuations
- Project finance planning and development modelling
- Owner's representation including operational and financial review and monitoring services
- Operator selection and management contract advisory
- Commercial and financial buy-side due diligence

### *Structuring Services*

- Licensing and tax structuring
- Legal services
- Destination Management Organisation (DMO) advisory
- Pre-opening project management
- Data analytics
- Transaction support
- Fixed asset tagging and FAR development

## Our Credentials

### *Tourism Infrastructure Master Planning and Roadmap for Manado, Indonesia*

We worked jointly with the Indonesia Investment Coordinating Board (Badan Koordinasi Penanaman Modal, BKPM) to deliver a concept master plan and roadmap for tourism infrastructure development in Manado. We created an investment business plan and roadmap to market sustainable investment; developed a comprehensive development plan for the Manado waterfront, and created bankable investment cases for drinking water and waste water treatment to protect the natural water resources in Manado.

### *Establishment of a State-owned Holding for Indonesia Tourism Ecosystem*

PwC supported the Ministry of State-Owned Enterprises in establishing the Indonesia Ecosystem Holding (ITE Holding), a holding company consisting of state-owned enterprises operating in the tourism or related industries. PwC assessed the holding's strategic objectives, structure, operating models, strategic initiatives, and value creation, as well as conducted economic impact assessment, legal analysis, and risk analysis. PwC also developing and aligning the holding program across 7 task forces (business development, financial, human resources, communication, legal, operational, and IT).

### *Corporate Transformation Program for the Indonesia Tourism Development Corporation (ITDC)*

We assisted the ITDC in a corporate transformation program to improve its performance in managing ten world-class luxury destinations within Indonesia. We supported the review and enhancement of its vision, mission, company strategy and core values, optimise its organisational structure and business processes, develop its organisational culture strategy and transform its HR functions / talent frameworks to get ready for future scenarios.

### *Feasibility study for Agrotourism and Educational Park in Semarang*

PwC was engaged by a multilateral development bank to develop a feasibility study for an agrotourism and educational park in Semarang. PwC assisted the Coordinating Ministry of Economic Affairs and the provincial government of Central Java in assessing the readiness of the project. This included assessment of the project's financing plan as part of the government assessment when evaluating the project, which would be funded by the proceeds of the Central Java municipal bond.

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# Our Publications

**Our research and insights set us apart.** One of our unique strengths globally is industry research. The quality of our research reflects not only the depth of our experience in the tourism sector, but also rigour in the disciplines of economics, statistics and advanced research methods. This, combined with our geographic diversity, enables us to operate at a global, regional and local level when advising our clients.

Our Services

Our Credentials

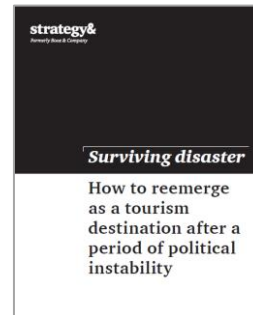
**Our Publications**

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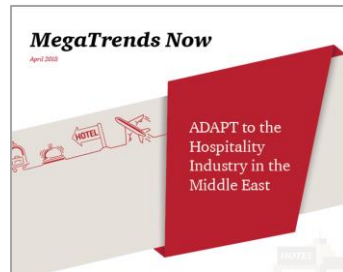
*Hotels response to COVID-19*



*How to re-emerge as a tourism destination after a period of political instability*



*Destination Middle East: Boosting the region's position in global tourism*



*MegaTrends Now: ADAPT to the Hospitality Industry in the Middle East*



*Hotels outlook: 2019-2023*

## Our Tourism Team in Indonesia



**Michael Goenawan**  
Deals Advisory  
Services



**Ay-Tjhing Phan**  
Tax Services



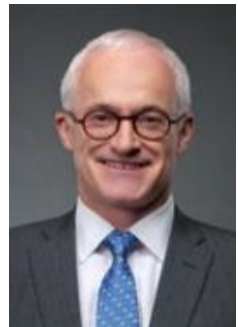
**Gopinath Menon**  
Assurance Services



**Marina Tusin**  
Consulting Services



**Melli Darsa**  
Legal Services



**Julian Smith**  
ESG, Capital  
Projects &  
Infrastructure



**Hendri Hendrawan**  
Capital Projects &  
Infrastructure



**Robert Herdiyanto**  
Economics & Policy



**Susetyo Priyojati**  
ESG

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Why PwC

## Why PwC?

With firms in 155 countries and more than 284,000 people, we help organisations look beyond traditional boundaries and embrace whole new possibilities in what their organisations can deliver. Clients of PwC firms all over the world select us because of the quality of the service that our people provide them every day.

Our Services

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**Why PwC**

Experience working with authorities, investors, and operators

A strong track record of international projects with the main players in the sector

Extensive experience of qualitative and quantitative research

A strong reputation for exactitude, rigour, independence and impartiality

In-depth knowledge of the tourism, hospitality and leisure industry, operations, and challenges

An integrated network with consistent service standards

## Contact us

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