Overview of the Tourism Industry in the Philippines and Updates on Tourism Investments

Presented by:

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VISITOR ARRIVALS January to May 2019 / 2018

May 2019	May 2018	Growth Rate
621,719	537,743	15.62%

Jan - May 2019	Jan - May 2018	Growth Rate
3,489,270	3,178,984	9.76%

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INTERNATIONAL TOURIST ARRIVALS 2018

Top 5 Markets



Korea 1,587,959 arrivals



China 1,255,258 arrivals



U.S.A. 1,034,396 arrivals



Japan 631,801 arrivals



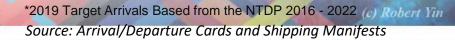
Australia 279,821 arrivals



VISITOR ARRIVALS 2014 - 2018 & TARGET 2019



REAL TOP



TOURISM RECEIPTS

In Million PHP



REMENT OF ,

AVERAGE DAILY EXPENDITURE & LENGTH OF STAY



Average Daily Expenditure (All Markets) (2018): \$ 109.42



Average Length of Stay (2018) 9.07 nights

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TOURISM EMPLOYMENT 2014 - 2018



REMENT OF

Year	# of Persons
	Employed
2014	4.819 M
2015	4.971 M
2016	5.224 M
2017	5.268 M
2018	5.365 M

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NATIONAL TOURISM DEVELOPMENT PLAN TARGETS (2022)



International

Number of Visitors

Receipts

12 Million

Php 921 Billion

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ENDORSED TOURISM DEVELOPMENT PROJECT (ETDP) 2018

	No. of	Capacity	Employment	Investment (in Million Php)		
	Projects			Local	Foreign	Total
HOTEL	10	1,454	969	6,427.40	67.00	6,494.40
RESORTS	9	1,977	4,718	43,242.00	0.00	43,242.00
RECREATIONAL FACILITY	4	NA	7,455	8,207.36	2,003.00	10,210.36
TOTAL	23	3,431	13,142	57,876.76	2,070.00	59,946.76

BREAKDOWN OF ETDPs: 3 - YEAR PERIOD 2016 TO 2018

Establishment Type	2018	2017	2016
Hotels	10	14	6
Resorts	9	5	2
Ecozone Developer	0	0	4
Ecozone Locator	0	0	2
Recreational Facility	4	0	0
Other Accommodation (Tourist Inn,	0	0	2
Apartelle,.Condotel, Service			
Residences)			
Ambulatory/Tertiary Hospital/Wellness	0	0	1
Center			
Sports & Recreation		0	1
Transportation: Air	0	0	11 / 1
Land	0	0	少多个人。
TOTAL	23	19	20
Investment Cost (Billions in ₱)	59, 946.76	12,684.65	184,886.91
Capacity/No. of Rooms	3,431	2512	3,624
Additional Seats: Air	0	0	68
Land	0	0	9,000
Manpower Requirement	13,142	2,053	23,241

Tourism Development Projects

Balar Hotel and Spa



Location: Brgy.
Balaring, Boac,
Marinduque

Date of commercial
operation:
June 2018

Huni Sicogon Bed and Breakfast



Location: Sicogon
Island, Carles, Iloilo
Date of commercial
operation:
June 2018

Summit Tacloban Hotel



Location: Marasbaras
Road, Tacloban
Date of commercial
operation:
June 2018

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Seda Ayala Center Cebu



Location: Cebu Business
Park, Cebu City
Date of commercial
operation:
July 2018

J7 Hotel and Resort



Location: Brgy. Bolilao, Mandurriao, Iloilo City Date of commercial operation: August 2018

Central Park Reef Hotel



Location: Barrio
Baretto, Olongapo
City
Date of commercial
operation:
December 2018

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Go Hotel Iligan



Location: Iligan City
Date of commercial
operation:
4th quarter 2018

Avior Hotel



Location: Santiago
Blvd. General Santos
City
Date of commercial
operation:
4th quarter 2018

Hilton Manila



Location: Newport City
Pasay City
Date of commercial
operation:
November 2018

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Aruga Hotel Makati



Location: Waterfront
Drive, Rockwell Center
Date of commercial
operation:
4th Quarter 2018

Dusit Thani Mactan Cebu Resort



Location: Punta Engano
Road, Lapu-Lapu City, Cebu
Date of commercial
operation:
May 2019

Sheraton Cebu Mactan Resort



Location: Punta
Engaño, Lapu-Lapu
City
Date of commercial
operation:
2019

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Yello! Hotel



Location: Lahug,
Cebu City
Date of commercial
operation:
January 2019

Dusit Thani Residence Davao



Location: Lanang
Business Park,
Davao City
Date of
commercial
operation:
January 2019

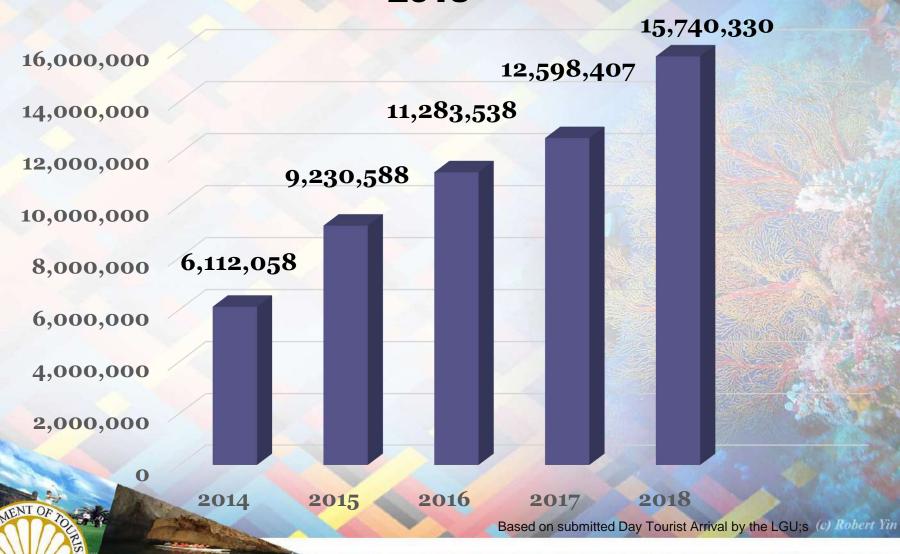
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REGION 1 OVERNIGHT TOURIST ARRIVALS 2014 - 2018



REGION 1 DAY VISITOR ARRIVALS 2014 - 2018



Location

Brief Description of the Project /

Name of

Investment	Background / Proposal	
CAUNAYAN-	Beachfront real-state area potential for a	Balaoai,
BALAOI-SUBEC	Resort/Hotel	Pagudpud
	Land Area: 340 hectares.	
	Ownership: Public: DENR	
SAUD MUNICIPAL	Beachfront real-state area potential for a	Saud,
BEACH	Resort/Hotel	Pagudpud
	Land Area: 18,361 sqm	
	Ownership: Public: Provincial and Municipal	
	Government	
CAPARISPISAN	Beachfront real-state area potential for a	Caparispisan,
	Resort/Hotel	Pagudpud
	Ownership: Private: Fayloga / Caluya	
	Land Area: 60 hectares	
	Ownership: Private: Benemerito Family	
	Land Area: 95 hectares	

Name of Brief Description of the Project / Location Investment Background / Proposal	
Investment Rackground / Proposal	
Investinent Dackground / Troposar	
BANGUI Beachfront real-state area potential for a Bangui	
MUNICIPAL BEACH Resort/Hotel	
PARK Ownership: Provincial/Municipal Government	
Land Area: 3,041 sqms.	
DUNGON-DUNGON Hillside land area potential for Resort/Hotel or Bangui	
HILLS Leisure Park	
Ownership: Public: Provincial Government	
Land Area: 300 hectares	
CAPE BOJEADOR And Heritage hillside land area with potential for Burgos	
HERITAGE SITE Resort; Hotel; Bed and Breakfast; Leisure Park	
Ownership: Public: Provincial Government	
Land Area: 32 hectares	

Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
WHITE ROCK	seafront; rockface; special geological site area for	Burgos
/KAPURPURAWAN	potential Resort; Hotel; Leisure Park	
PARK	Ownership: Public: Provincial Government	
	Land Area: 3 hectares	
MANGROVE PARK	Mangrove Forest with potential as Nature Park	Pasuquin
	Ownership: Public: DENR and Provincial	
	Government	
	Land Area: 60 hectares	
GOVERNOR'S	riverfront; hillside area with potential for Resort;	Vintar
GUEST HOUSE	Hotel; Bed and Breakfast; Leisure Park	
	Ownership: Public: Provincial Government	
	Land Area: 108 hectares	
CNT OF		

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Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
LAOAG	Potential for upgrade of the facilities	Laoag City
INTERNATIONAL	Ownership: CAAP	
AIRPORT	Land Area: 85 hectares	
	13 Hectares near the airport for	
	possible commercial use.	
DAP-AYAN	city; commercial district potential for commercial	Laoag City
	use or Hotel.	
	Ownership: Public: Provincial Government	
	Land Area: 2,200 sqm	
SIRIB MILE	city; education and business district potential for	Laoag City
	mixed-use commercial; mixed income housing	
	Ownership: Public: Provincial Government	
	Land Area: 7 Hectare	
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Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
PAOAY SAND	Seafront; sand dunes; National Geological	
DUNES	Monument for potential Resort; Hotel; Leisure Park;	
	Golf Course	
	Ownership: Public: Provincial Government	
	Land Area: 750 Hectare	
PLAZA DEL NORTE	A hotel situated within Paoay San Dunes, adjacent	Laoag City
	to Paoay Lake and Malacanang of the North with	
	potential for Expansion and upgrading of hotel and	
	convention center	
	Ownership: Public: Provincial Government	
	Land Area: 10 Hectare	

Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
PAOAY LAKE	Lakefront land with potential for quay development;	Paoay
	water sports; leisure park; hotel	
	Ownership: Public: DENR; TIEZA; Provincial Government	
	Land Area: 470 Hectare	
PAOAY GOLF	Lakefront land with potential for quay development;	Paoay
COURSE	water sports; leisure park; hotel	
	Ownership: TIEZA	
	Land Area:	
PASEO DE	A mixed-use building in the Spanishrenaissance style	Paoay
PAOAY	with commercial spaces for traditional crafts,	
	restaurants, and exhibition spaces (Phase 1, completed)	
	and an events venue (Phase 2). Potential for Bed and	
	Breakfast; restaurant;	
	Ownership: Public: Provincial Government	
A B B B		

	delitiai investiment in cas in nocos norte	
Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
ARTE LUNA	A gallery for changing exhibitions, this brick building	Paoay
GALLERY	used to be a Primera Escuela during the Spanish Era.	
	With potential investment for Bed and Breakfast,	
	restaurant;	
	Ownership: Public: Provincial Government	
CONVENTO	The famed Spanish-period Augustinian Convent of St.	Paoay
RUINS	Augustine Church, it's ruins are presently being	
	conserved by the Provincial Government for various	
	purposes. Potential investment for Mixed-use	
	commercial, restaurant, event venue, bed and breakfast	
	Ownership: Public/Private: Provincial Government	
	under special ownership and management agreement	
	with Diocese of Laoag	
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Name of	Brief Description of the Project /
Investment	Background / Proposal

Locatio n

BATAC-BANNA ECO mountainous views with potential investment for **PARK** Leisure Park; Mountain Resort

Ownership: Public and Private Land Area: 400 Hectare

CITY Lakefront land with potential investment for Fresh Batac

seafood restaurant; leisure park Ownership: Public: Provincial Government

Land Area: 30 Hectare Seaport with potential investment Port development **CURRIMAO PORT** and expansion; commercial buildings; leisure facilities; reclamation Ownership: Public and Private Land Area: 24 has.; potential reclamation

BILLOCA FISHFARM

City Currimao

BATAC

Name of	Brief Description of the Project /	Locatio
Investment	Background / Proposal	$ \mathbf{n} $
MMSU Beachfront	Beachfront real-state area with potential investment	Currimao
	for hotel; leisure park	
	Ownership: Public	
	Land Area: 5.7 Hectare	
TABACALERA/	Seafront with exposed black corals; Heritage site with	Currimao
SPANISH PORT OF	the Spanish-period port warehouse with walls still	
CURRIMAO	intact, and two watch towers of coral stone of the	
	same period with potential investment for Hotel; bead	
	and breakfast; restaurant; leisure park;	
	Ownership: Private	
	Land Area: 1 Hectare	

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Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
CURRIMAO	Beachfront real-state area with potential	Currimao
HILLSIDE	investment for hotel or Resort	
PROPERTY	Ownership: Private: Eastern Telecom	
	Land Area: 20 Hectare	
BADOC ISLAND	An uninhabited island located 1km. off the shore of	Badoc
	Badoc, with a long stretch of white sand and rock	
	formations. Excellent for surfing and diving.	
	Potential investment for Resort and hotel	
	Ownership: Private: Crisologo	
	Land Area: 40 Hectare	



Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
GABUT ISLAND	A small island with interesting coral formations and	Badoc
	lagoon, located around 300 hundred meters off the	
	shore of Badoc. Potential investment for Resort and	
	hotel or leisure park.	
	Ownership: Private: Rubio	
	Land Area: 2 Hectare	

For Information on Ilocos Norte Investments please contact:

- Ilocos Norte Trade and Investments Promotions Center (INVest)
 - Telephone Numbers: +6377-772-1212 loc. 140
 - Email address:invest@ilocosnorte.gov.ph

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Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
Sual Commercial	Phase I is completed in 2012	Sual
Seaport	Phase II & III under detailed engineering	
	design	
	 For PPP/Private Sector Investment 	
	 Project Cost in Php: 500 Million 	
Lingayen Airport	 Pre-investment study completed 	Lingayen
Upgrading	 With PDC, SB, SP & RDC Endorsement 	
	 Project Cost: Php 500 Million 	
Lingayen Gulf Cruise	 For Pre-FS/FS Preparation 	Tri City (San Fernando,
	For Private Sector Investment	Dagupan, Alaminos)
	 Project Cost: To be determined by feasibility 	
	study	
Commercial Marina	 For Pre-FS/FS Preparation 	Bolinao/Lingayen
Development	For Private Sector Investment	
	 Project Cost: To be determined by feasibility 	
	study	

Name of Investment	Brief Description of the Project / Background / Proposal	Location
Fish Processing Plant	 For Pre-Feasibility Study/Preparation Project Cost: To be determined by feasibility study 	Sual/Bolinao/Binmale y
Sual Industrial Estate Development	 With Pre-F/S Project Definition Study For Private Sector Investment Project Cost: To be determined by feasibility study 	Sual
Pangasinan Economic and Tourism Zone Development	 For PPP/Public Sector Investment Project Cost: Php 10 Billion (Initial estimate) 	Lingayen
Renewable Energy Development	 For PPP/Private Sector Investment Project Cost: To be determined by feasibility study 	Not yet specified

Name of Investment	Brief Description of the Project / Background / Proposal	Location
BPO's Call Centers/ICT Centers	 For Private Sector Investment Project Cost: To be determined by feasibility study 	Highly urbanized cities of the province
Fruits and vegetables Processing Plant	 With Pre-Feasibility Study for Mango Processing Plant Project Cost: Php 81 Million 	San Carlos City
Tourism Accommodations and Related Facilities and Services	 For PPP/Private Sector Investment Project Cost: To be determined by feasibility study 	Major Tourist Destinations

Name of Investment	Brief Description of the Project / Background / Proposal	Location
Deep Sea Fishing	 For Pre-FS/FS Preparation 	Sual
Boat Repair and	For Private sector Investment	
Ship Building	 Project Cost: To be determined by feasibility 	
	study	
Retirement Village	 For Private Sector Investment 	Bolinao/Majot
	 Project Cost: To be determined by feasibility 	tourist
	study	destinations in
		the province

For Information on Pangasinan Investments please contact:

- Office of the Governor: +63917-311-4144
- Email Address: pgoadmin2013@gmail.com
- Provincial Planning and Development Office
 - Telephone Number:+6375-632-0818
 - Email Address:
 - Website: www.pangasinan.gov.ph

Name of	Brief D
Investment	Backgr
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escription of the Project / ound / Proposal

Location

Proposed Agro The proposed Agro-Industrial Park has an Nagpanaoan, Industrial Park area of approximately 160 hectares. It is Santa within Alienable and Disposable lands. It will Dammay, be industrial platform where agri-industries Santa / and other companies will be engaged in agro- Tamurong, processing and related activities to be located Caoayan / and concentrated. This will serve as strategic Puro, tool for agricultural and agro-industrial Caoayan development aimed at increasing competitiveness (generating positive externalities in labor markets and in the respecting environment) while the individualism of each territory.

Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
Ilocos Sur	The area is selected will highly developed into agro-industrial	Mabilbila Sur,
Agro-	estate with the existing facilities enumerated below:	Santa
Industrial	The Multi-line food Processing Plant was established as a result	
Economic	of the clamor of farmers for competitive farm gate of products.	
Zone	With this project, farmers and fishermen shall be weaned from	
	the unscrupulous traders and middlemen and shall have a	
	choice where to sell their produce. They are also encouraged to	
	become more productive because market is now	
	The Tomato Paste Plant of Ilocos Sur is a modern industrial	
	facility which is equipped with puissant equipage and state-of-	
	the-art processing facility. It was establish to help and alleviate	
	the destitute economic condition of the tomato growers. It was	
	design to process 30 metric tons of fresh tomato per hour and	
	at full production produced 20,000 metric tons of tomato	
	pastes both in domestic and foreign markets. The major	
	consumer of tomato paste are sardine canners and tomato	
	sauce products.	
	An additional of a 10 MW Biomas Power Plant Generate up to	
	3MW and 7 MW	

Name of Investment

Brief Description of the Project / Background / Proposal

Location

Ilocos Sur Cultural Heritage Tourism Zone

The project needs a road rehabilitation toward the sea, National site development along the highway, construction of Highway, Pideg office building, pavilion, picnic sheds, public restroom, Pass, Santa cottages, swimming pool, outdoor scenography theater for cultural show, camping grounds and some other necessary project for tourist attraction.

The proposed project offer vast potential eco-tourism benefits. With its fully grown forest tree in abundance, the presence of spring and presence of some wildlife, the place can be develop as picnic area, for mountain trekking/climbing educational trip for students and purely sightseeing. It is also ideal venue for seminar, conference and other social and recreation activities.



Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
Ilocos Sur	The project shall comprise the Master Planning of the	Brgy. Tamag,
Information	proposed facility into TIEZA complex consisting of a	Vigan City
Technology Park and	new Satellite Regional Government Center	
Government Center	interconnected to the Octagonal Governor's Turret:	
Economic Zome	Hotel of 100 rooms and a swimming pool, a Business	
	Processing Outsourcing, a Regional Training-Multi-	
	Purpose Spots Center, a landscape plaza and parking	
	areas. All the facilities have commercial/retail spaces	
	on their ground levels.	



Name of	Brief Description of the Project / Background	Location
Investment	/ Proposal	
Concert Centers ,	Potential Land area for construction of Concert Centers	City of San
Amusement	and Amusement Parks	Fernando
Parks and		
Convention		
Center in La		
Union		
Retirement	Potential to invest to create a retirement area in La Union	Major
Village with		
Complete		
Wellness Center		
Establishment of	Potential investment on All-Weather Track Oval with	La Union
Sports, Health	Physical Fitness Center, One-Stop Medical Tourism	
and Wellness	Center (coordination between hotels and hospitals)	
Facilities	Training Centers of 'Hilot" or Masseurs with World-	
	Class Skills	
	in City of San Fernando, La Union and neighboring	
	municipality	

Name of Investment	Brief Description of the Project / Background / Proposal	Location
Water Transport	Investment for the improvement of the seaport of City of	City of San
(La Union to	San Fernando and for watercraft for a possible sea route	Fernando
Lingayen	going to Dagupan and Alaminos city, Pangasinan	
Hundred		
Islands/ Love		
Boat/ Floating		
Restaurant) and		
Air Transport		
Religious	Potential investment for Pilgrim Mountain Resort,	
Tourism	Retreat Houses	
Establishment of	Potential for investing for Eco-Tourism Facilities	
Eco-Tourism		
Facilities		
Tourist Shuttle	Creation of Tourist shuttle bus system in La Union.	
Bus Transport		
80 11/05		

Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
Creation of more	Finding investor to construct 5 star Accommodation	
high end	establishment in La Union	
Accommodation		
Establishment		
Cable Car	Investment for a cable car transportation facilities in the	Mountain
Transport for	mountain municipality of La Union	Municipalitie
Inland Towns		s of La Union
Agriculture and	Potential investor for Exotic Fruits Production and	
Fishery	Processing, Organic Fertilizer Production and	
	Organic Crops, High Value Commercial Crops	
	Production and Processing Forestry, Livestock and	
	Poultry Production, Processing and Packaging,	
	Expansion of Mariculture Projects / Aquaculture,	
	Post Harvest Facilities, Fruit / Meat Processing,	
	Feed Mill	
EA I I		AND RESIDENCE OF THE PARTY OF T

Name of	Brief Description of the Project / Background	Location
Investment	/ Proposal	
Infrastructure	Development or upgrade of infrastructure services	
and Services /		
Alternative		
Energies		
Religious	Potential investment for Pilgrim Mountain Resort,	
Tourism	Retreat Houses	
Establishment of	Potential for investing for Eco-Tourism Facilities	
Eco-Tourism		
Facilities		
Tourist Shuttle	Creation of Tourist shuttle bus system in La Union.	
Bus Transport		

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Name of	Brief Description of the Project /	Location
Investment	Background / Proposal	
Agriculture and	Potential investor for Exotic Fruits Production and	
Fishery	Processing, Organic Fertilizer Production and	
	Organic Crops, High Value Commercial Crops	
	Production and Processing Forestry, Livestock and	
	Poultry Production, Processing and Packaging,	
	Expansion of Mariculture Projects / Aquaculture,	
	Post Harvest Facilities, Fruit / Meat Processing,	
	Feed Mill	
Infrastructure	Development or upgrade of infrastructure services	
and Services /		
Alternative		
Energies		





