

Air Transport Infrastructure

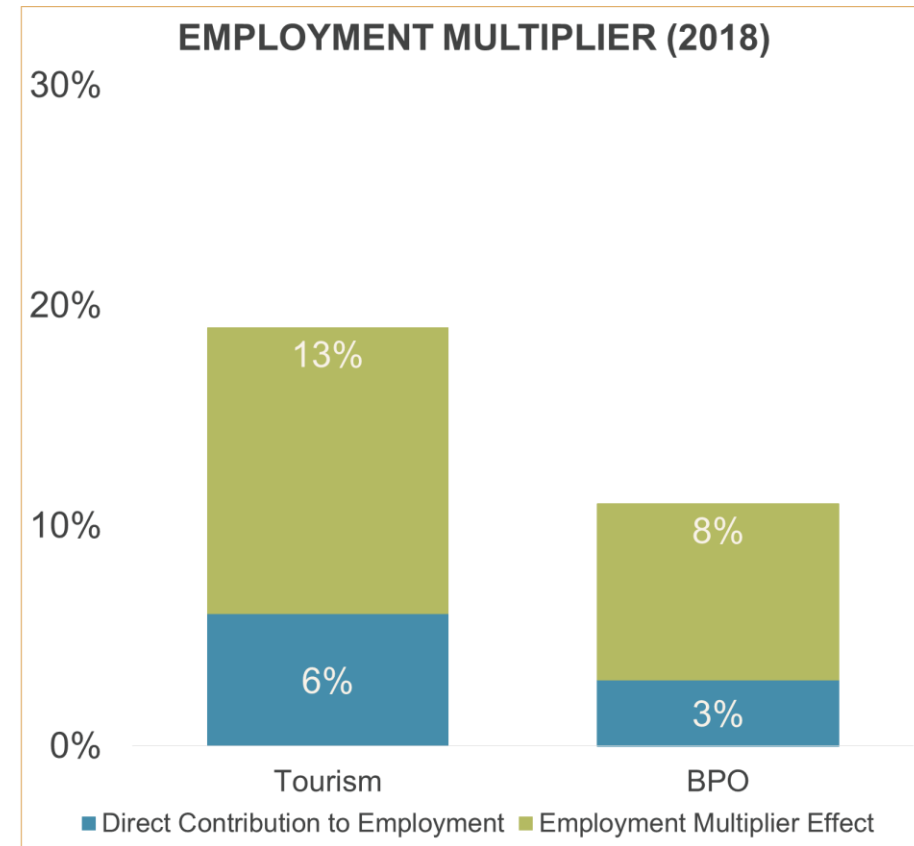
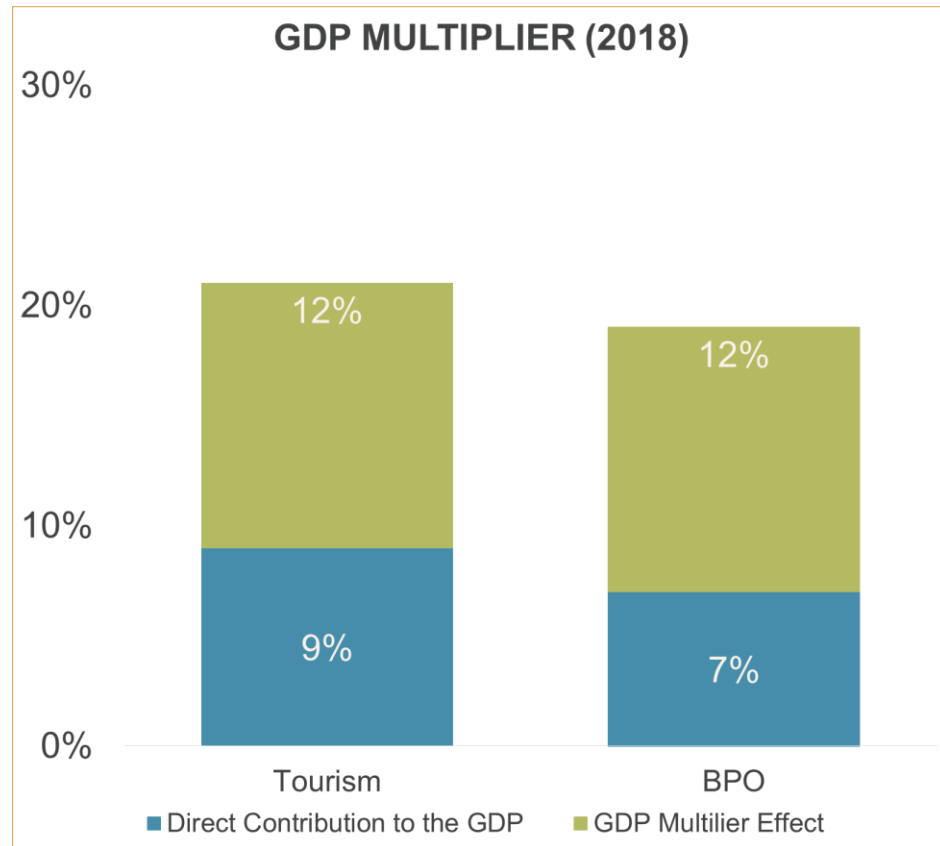
13 April 2023




cebu pacific
Let's fly every Juan

Air transport enables tourism, an industry where PH has a competitive advantage

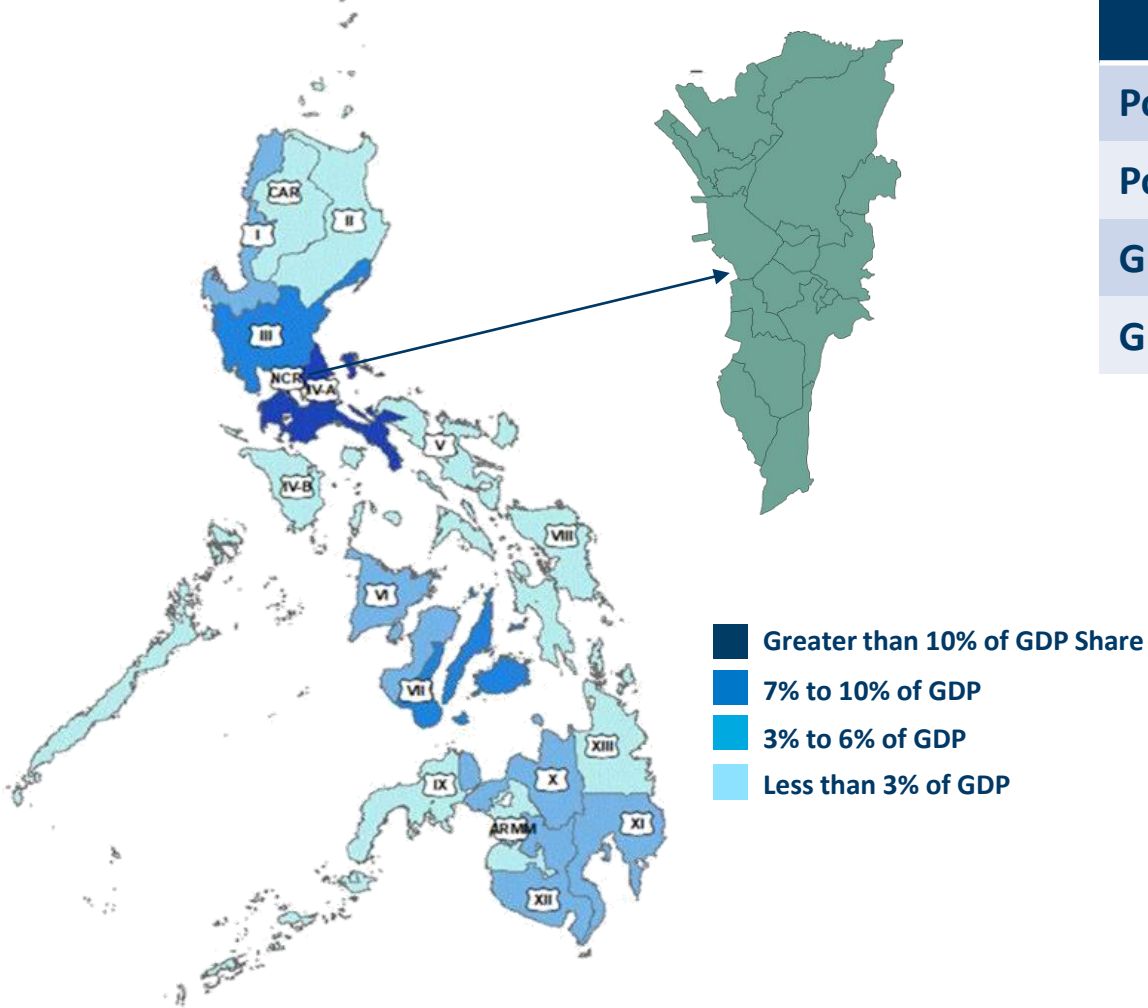
Tourism multiplier effect on GDP and employment is higher or at par with BPO



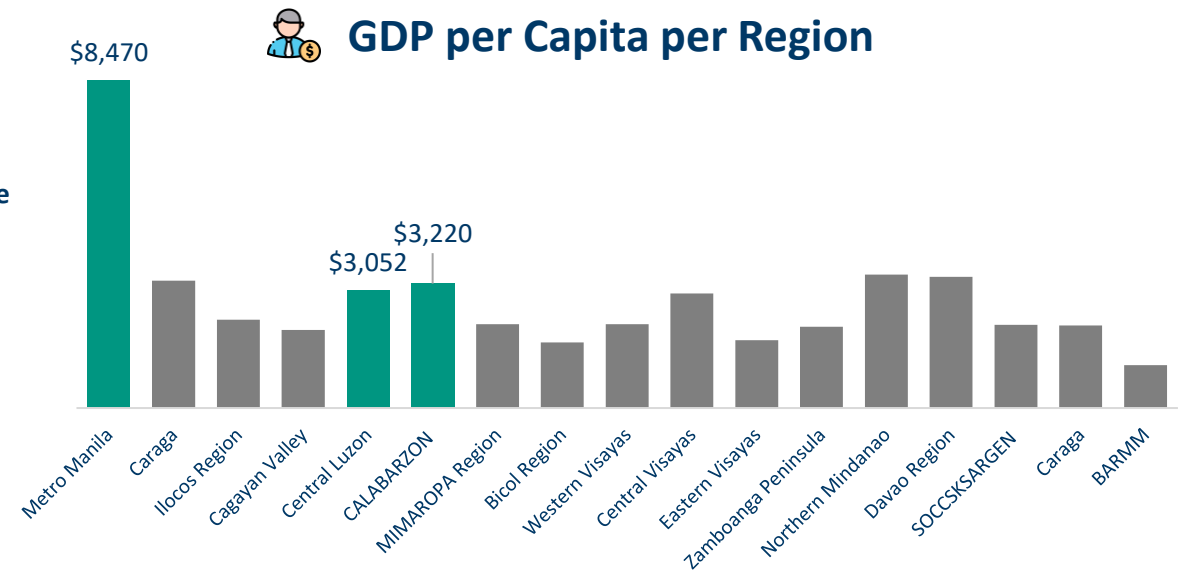
Sources: World Travel and Tourism Council (WTTC)

Structure will not change: economic activity concentrated in Metro Manila

Philippine GDP Distribution Map



	Philippines	Metro Manila
Population	113 million	13 million
Population Density	385 people/km ²	21,765 people/km ²
GDP	USD 377Bn	USD 121Bn
GDP per Capita	USD 3,331	USD 8,470



Close to 40,000 new aircraft are expected for delivery over the next 20 years

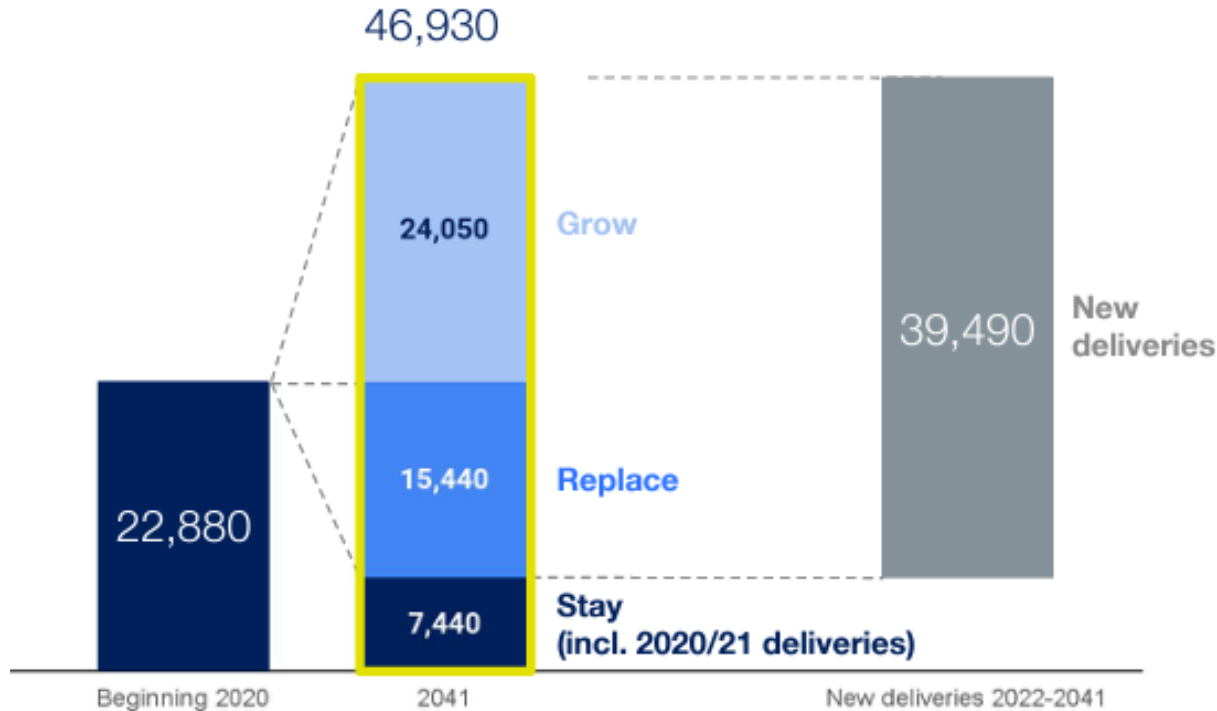
2022 - 2041

Almost 47,000 in service aircraft in 2041

Source: Airbus GMF

Notes: Passenger aircraft above 100 seats & freighters with a payload above 10t

Number of aircraft



22,880 aircraft in-service beginning of 2020:

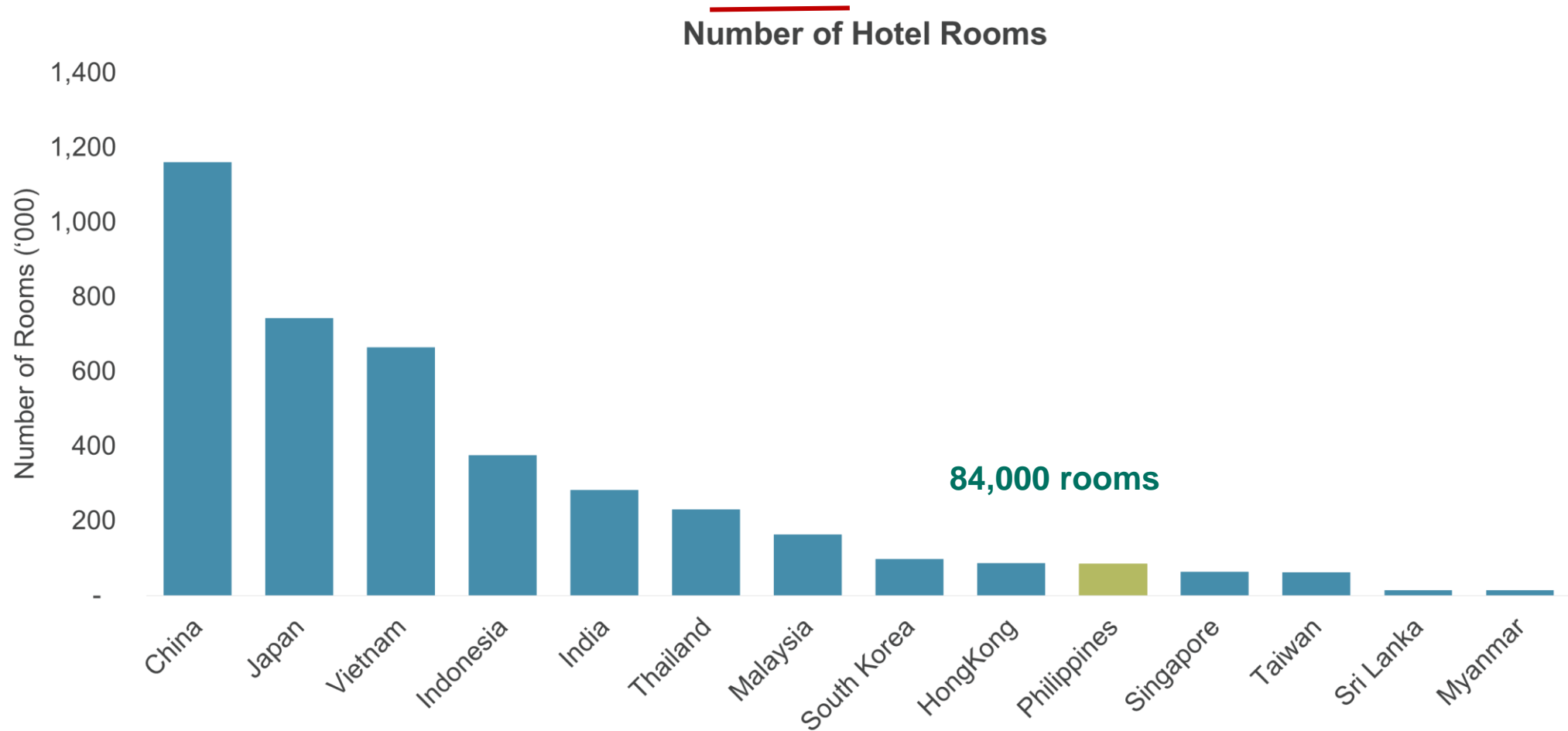
33% will stay in-service (including 2020 & 2021 deliveries)
67% will be replaced

39,490 new deliveries 2022-2041:

60% for growth
40% for replacement

If you build it, they *may* come. But if you don't, they won't


Number of hotel rooms in Philippines less than in neighboring Asian countries



Source: HVS 2021

PH's top tourist draw has 1/10th the room count of competing ASEAN destinations

Philippine major tourism destinations need critical mass to compete



Location	2022 Hotel rooms
Phuket	92,604
Bali	80,000
Boracay	8,367
Mactan	3,290
Palawan	3,352
Bohol	2,193

Note: For PH locations, hotel rooms are based on the List of DOT accredited hotels and resorts as of December 2022, excluding tourist inns, motels, pension houses, and bed and breakfast

Sources: DOT List of Accredited Tourism Enterprises, Bangkok Post, CBRE Research: Bali Hotel Market Outlook & Prospects 2022



Thank You!

