

Development Horizons Hotels

Hotel Investments Group
SMIC

November 14, 2007





Domestic Tourism



The Market

Domestic Travel Size
12 million overnight
stays (DOT)

- Domestic business
- Domestic tourism
- OFW return visits

Philippine Market Overview

Opportunities

- Multi site brands primarily in metropolitan areas
- Growing demand for hotel accommodations from multiple users in 2nd, 3rd tier locations
- Predominantly Independent hotels offering wide range of inconsistent standards
- No hotel group synergies to network country demand

C A S A
SM



C A S A SM : Product

- 50 room minimum
- Average Rate Php2,000
- Room size – 24sqm
- Smart construction budget
- Tech smart
- International hotel operator
- Outsourced F&B to fastfood market leader
- Wedding Hall

SM Mall Synergies



Hotel Investments

Group

Sta. Rosa, Laguna

Lipa

Bacolod

Sucab

Molino

Davao

Manila

Batangas City

Iloilo

Marilao

Mall of Asia

Southmall

Baguio

Cagayan de Oro

Megamall

Lucena

Valenzuela

Sta. Mesa

Pampanga

Pasig

North Edsa

Bacoor

Clark

Marikina

Taytay

Cebu

San Lazaro

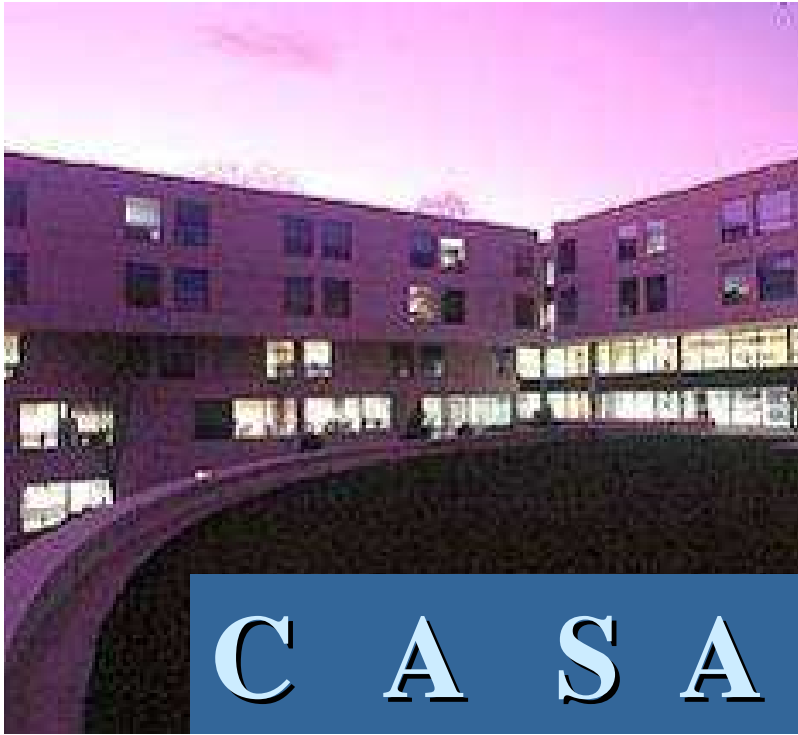
Bicutan

Muntinlupa

Dasmariñas

Select
14 sites for
C A S A

launch
Beta Sites



C A S A

