



A Perspective of Sustainable Tourism Development In the Philippine

Tehran, Islamic Republic of Iran
14-16 October 2014

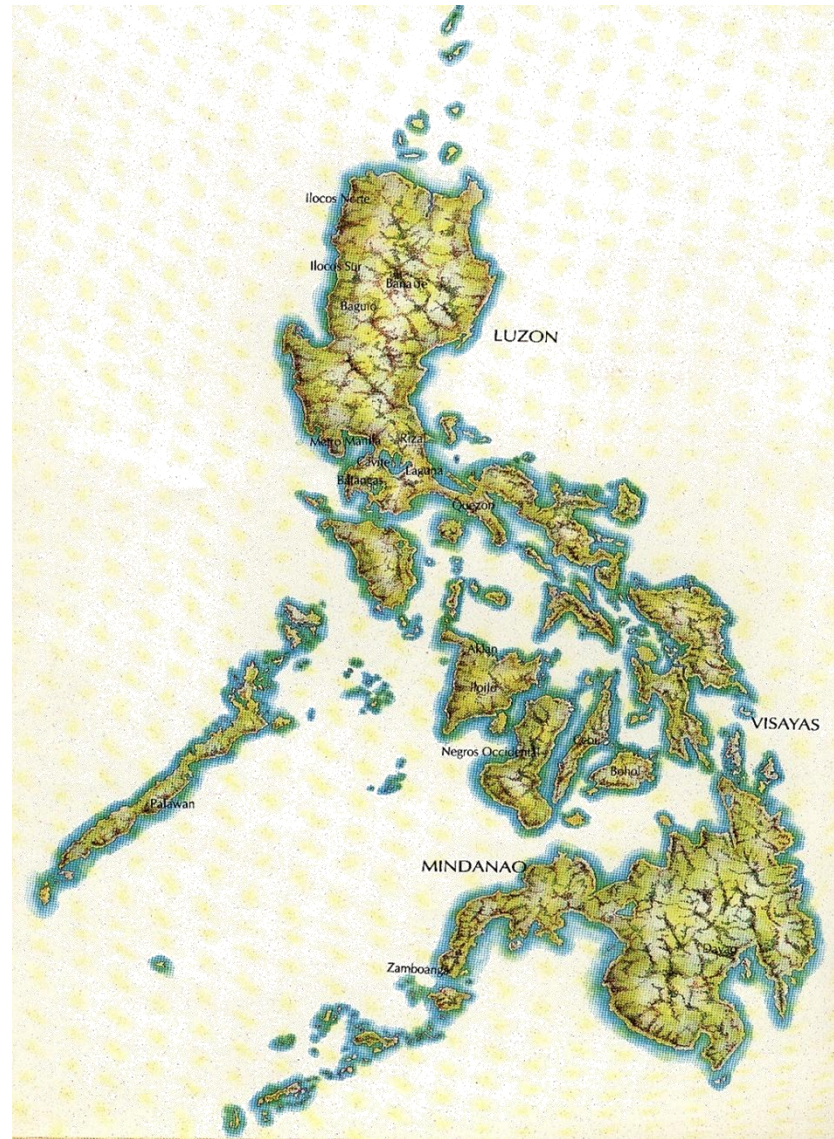


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The Philippines

- It lies in the heart of Southeast Asia and is readily accessible to the different capitals of the world
- Comprised of 7,107 islands
- It is divided into three main geographical divisions namely: Luzon, Visayas, and Mindanao
- Manila is its Capital City
- It is the third largest English speaking country in the world
- It has a rich history combining Asian, European, and American influences.



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Tourism Assets

- The Philippines is endowed with diverse tangible and intangible cultural and natural heritage assets
- The natural and cultural heritage tourism assets of the country support an extensive range of tourism activities including:
 - beach and island resort experiences;
 - cultural sightseeing, participation in cultural festivals and events; and
 - nature-based sightseeing, adventure activities such as trekking and climbing, and marine activities such as scuba diving.

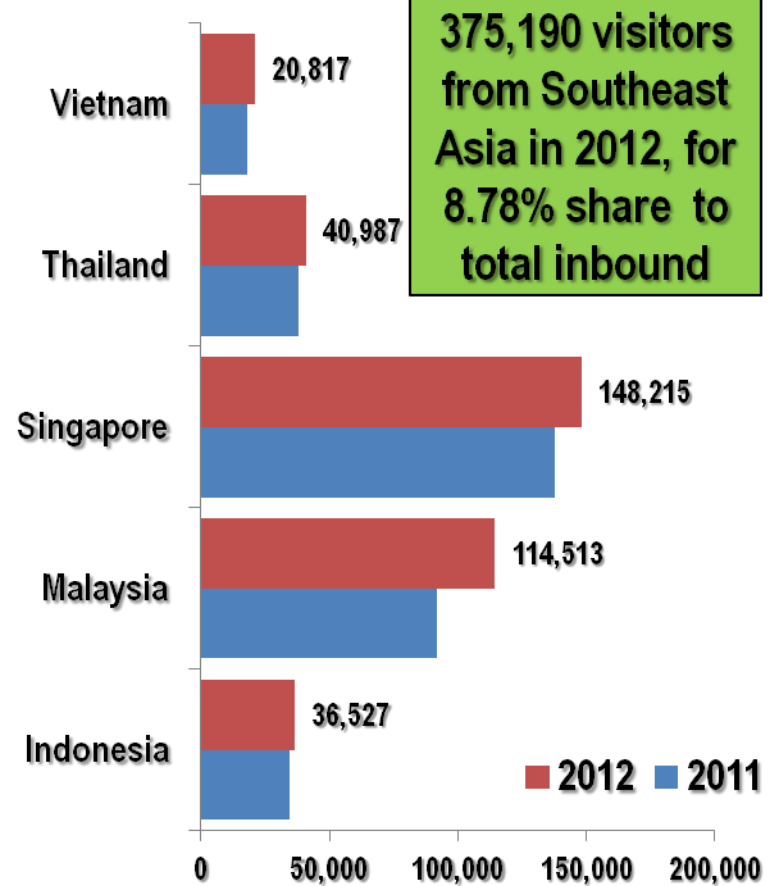


Visitor Arrivals from ...

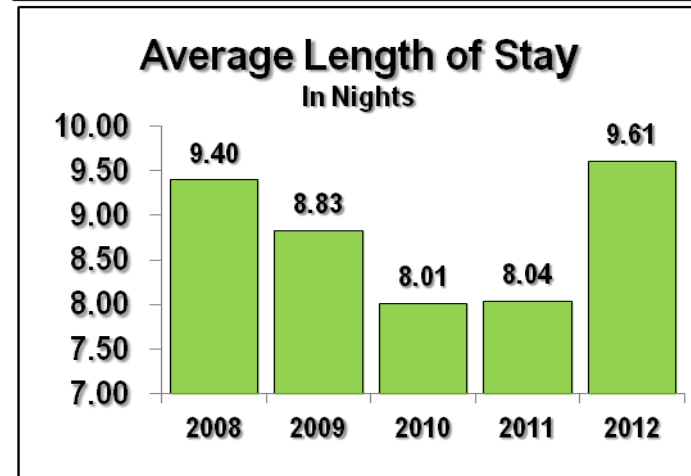
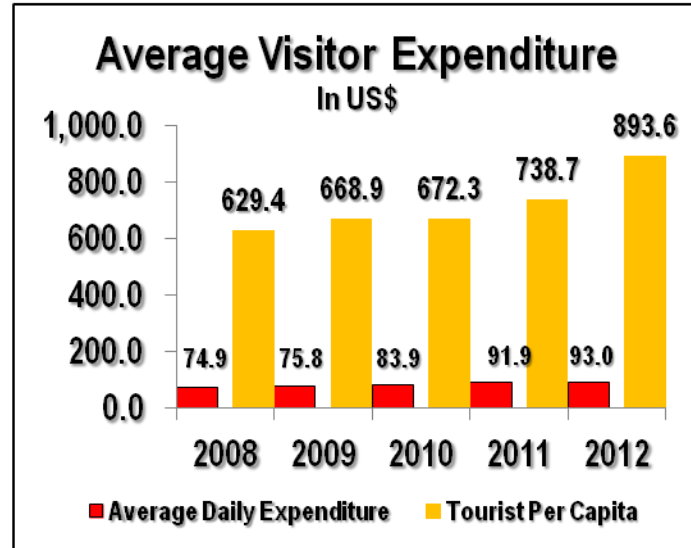
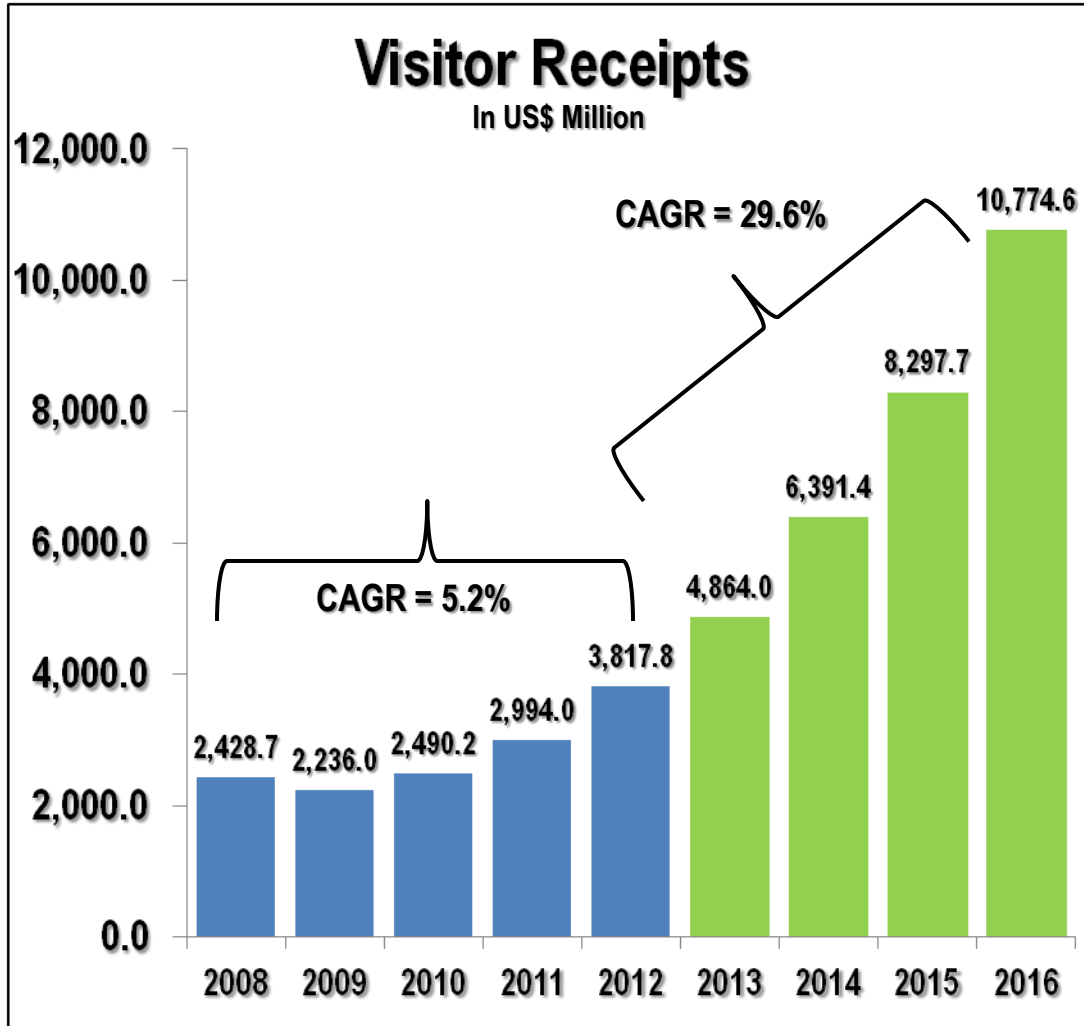
East Asia and the Pacific



Southeast Asia



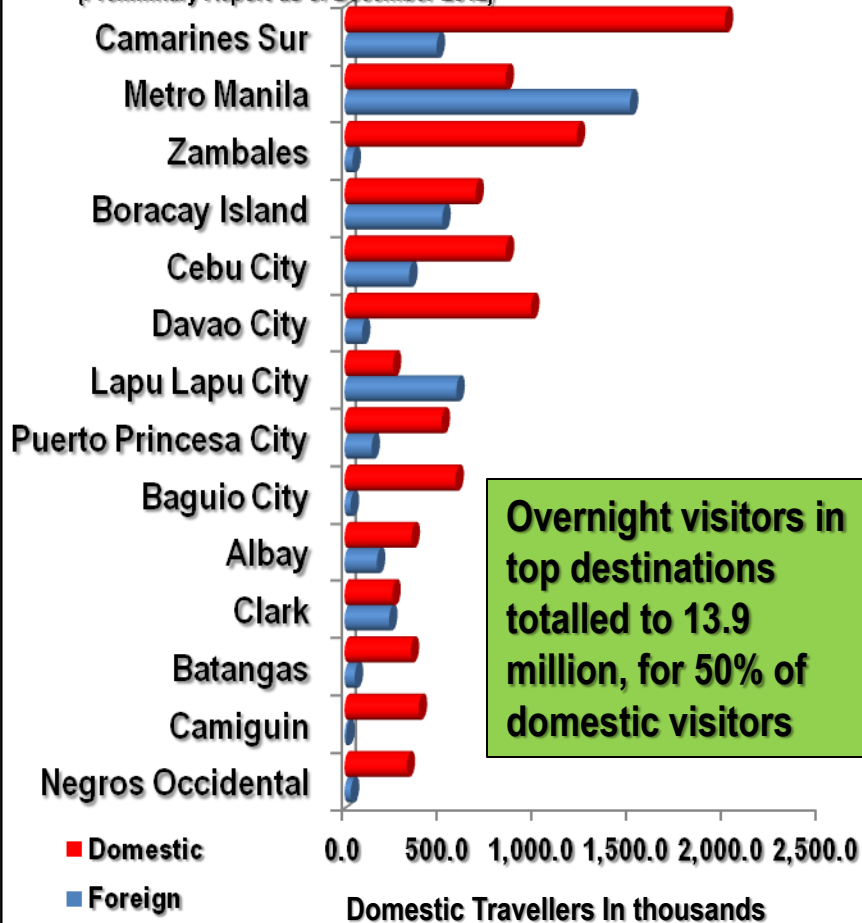
International Visitor Receipts



Domestic Travellers, 2012

Top Overnight Destinations

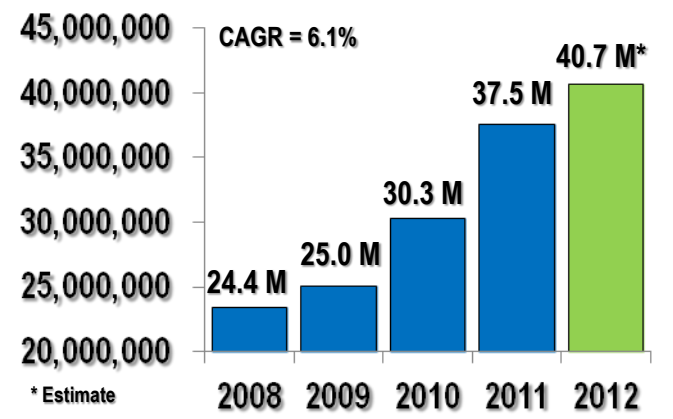
(Preliminary Report as of December 2012)



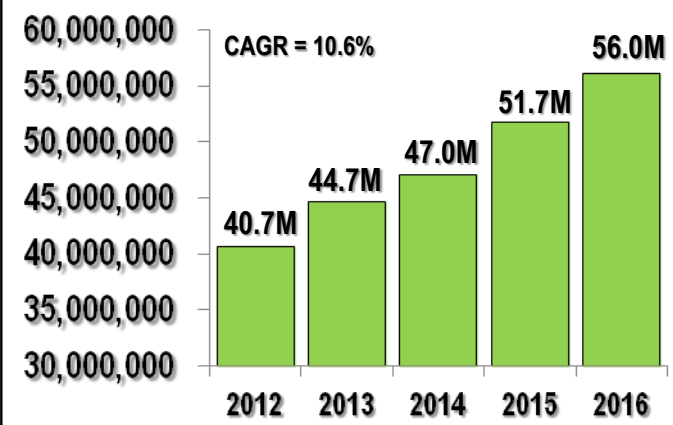
Overnight visitors in top destinations totalled to 13.9 million, for 50% of domestic visitors

Total	
2,491.159	18.0%
2,354.644	17.0%
1,266.889	9.1%
1,206.252	8.7%
1,191.753	8.6%
1,075.000	7.7%
844.570	6.1%
654.033	4.7%
617.079	4.4%
523.832	3.8%
486.595	3.5%
402.815	2.9%
400.219	2.9%
360.890	2.6%

Domestic Travelers by Year



Projected Domestic Travelers



Room Capacity, 2012

Destinations	Available Room	Number of Establishments
Northern PH	71,804	2,248
Metro Manila	31,790	320
Central Luzon	15,024	489
Other Regions	24,990	1,439
Central PH	61,978	3,220
Western Visayas	15,200	635
Central Visayas	27,447	1,306
Other Regions	19,331	1,279
Southern PH	28,922	1,405
Northern Mindanao	8,113	380
Southern Mindanao	9,613	404
Other Regions	11,196	621
Total PH	162,704	6,873

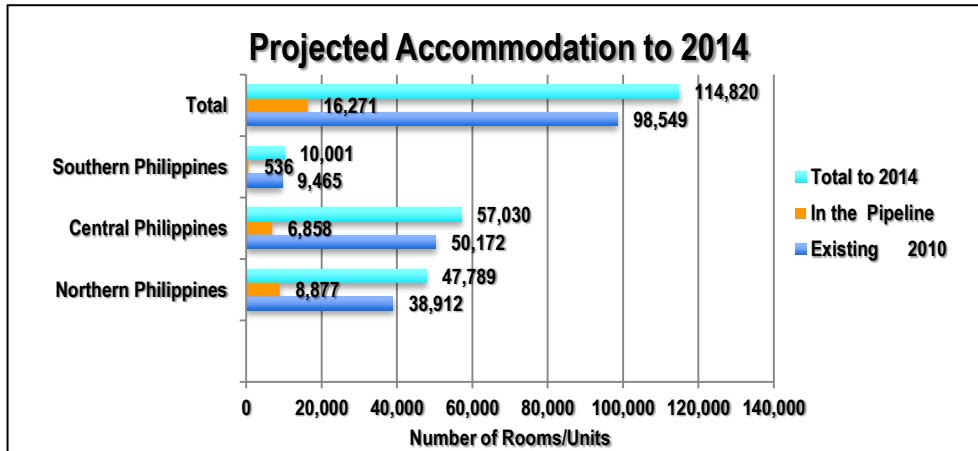


Hotel Expansion Program in Select Destinations

Name	Additional Rooms
Aklan (Boracay Island)	1,599
Bohol (Panglao Island)	1,250
Metro Manila	1,123
Cebu/ Lapu Lapu/ Mandaue	646



Existing rooms will soon be filled up ... but ongoing constructions are expected to increase accommodation capacities

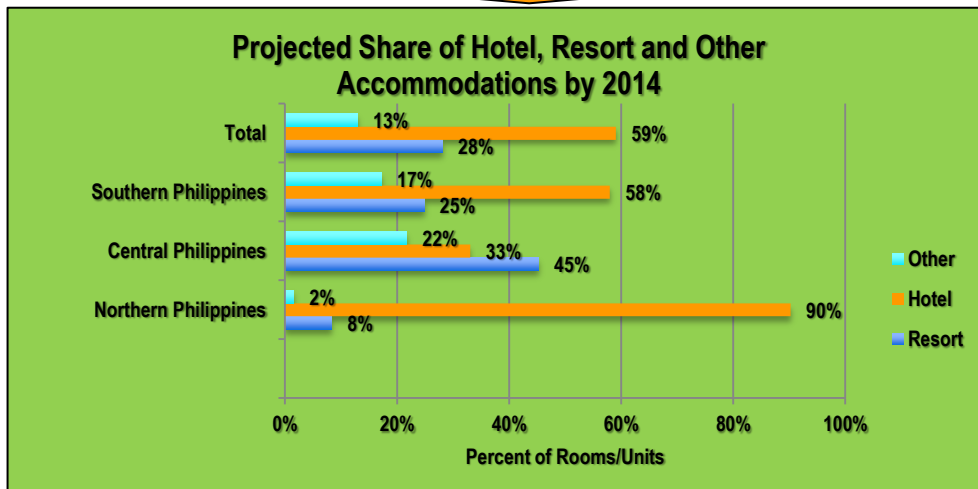


- Existing: 98,052 rooms
- In Pipeline to 2016: 16, 654 rooms
- Total Units by 2016: 169,624 rooms:

- ❖ Hotel = 59% of capacity
- ❖ Resorts = 28% of capacity
- ❖ Other = 13% of capacity

➤ **Central Philippines has highest volume of resort units**

➤ Northern Philippines has highest number of hotel units



Summary of issues and constraints

➤ Infrastructure

- Aged and heavy congested international airport infrastructure
- Inadequate air, sea and road infrastructure connectivity
- Absence of last mile access to tourism sites

➤ Transportation

- Inability to develop and expand air access from key growth markets
- Limited transport connectivity from gateways to tourism development areas

➤ Product Development

- Limited number of integrated destinations offering variety of things to see and things to do
- Inadequate concern for environment, support infrastructure, and safety and security
- Non-compliance to standards for facilities and services



Summary of issues and constraints

➤ Travel and Investment Facilitation

- Outdated visa entry policy and procedures
- Unfriendly business environment (e.g. CCT and CIQ)
- Conflicting national and local laws

➤ Institutional

- Low budget for marketing and promotion
- Mismatch in education curriculum and required industry skills
- Uncoordinated institutional support for environmental and cultural conservation
- Limited access for vulnerable groups (e.g. Women, IPs)



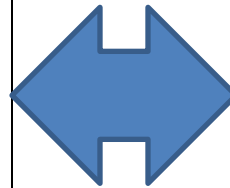
National Tourism Development Plan

Goal:

Develop a highly competitive and **environmentally and socially responsible tourism** that delivers more widely distributed income and employment opportunities

Vision:

Become the **must experience and more FUN** destination in Asia



Strategic Direction 1:

Develop and market competitive tourist products and destinations

Strategic Direction 2:

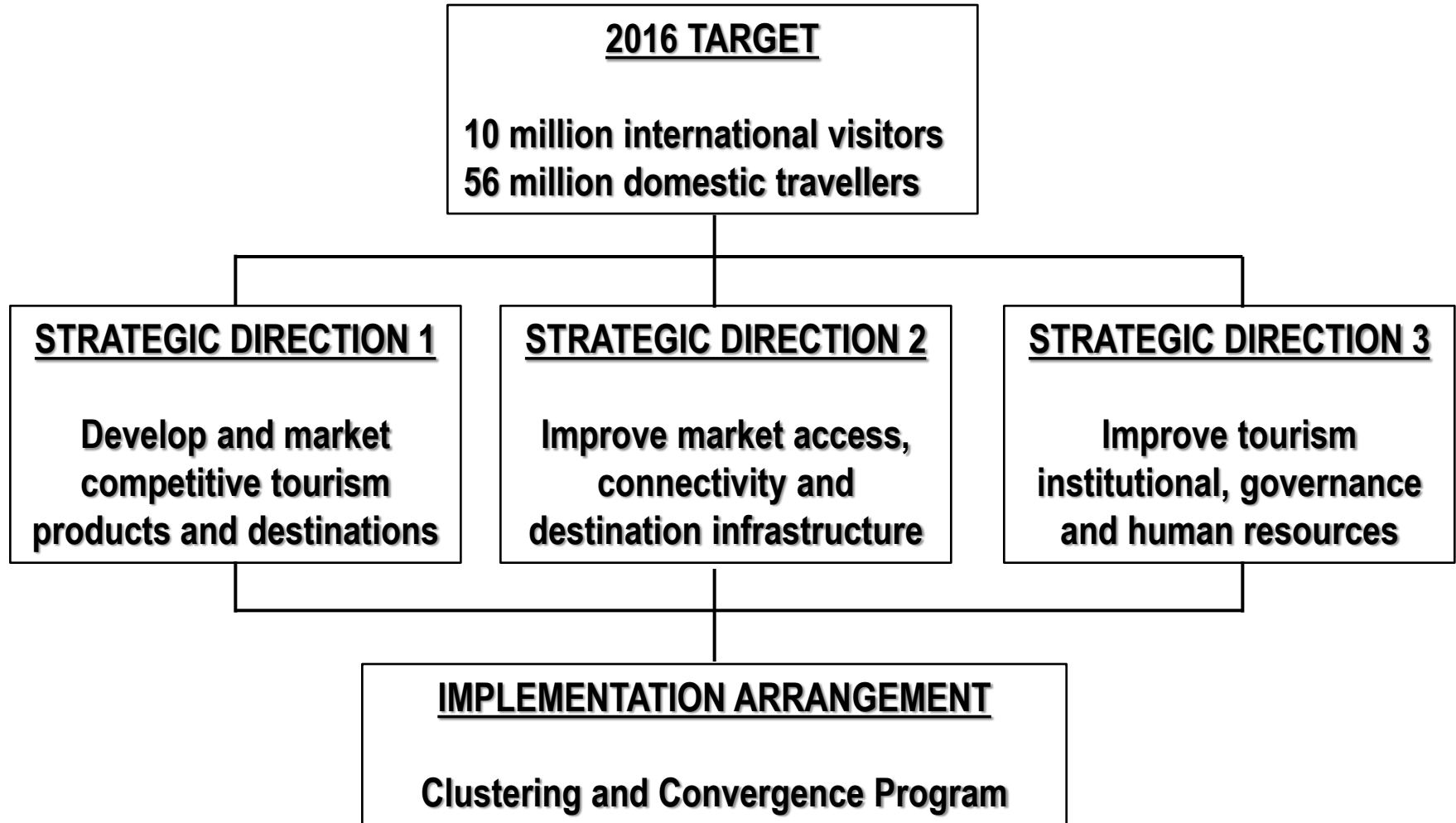
Improve market access, connectivity and destination infrastructure

Strategic Direction 3:

Improve tourism institutional governance and human resources



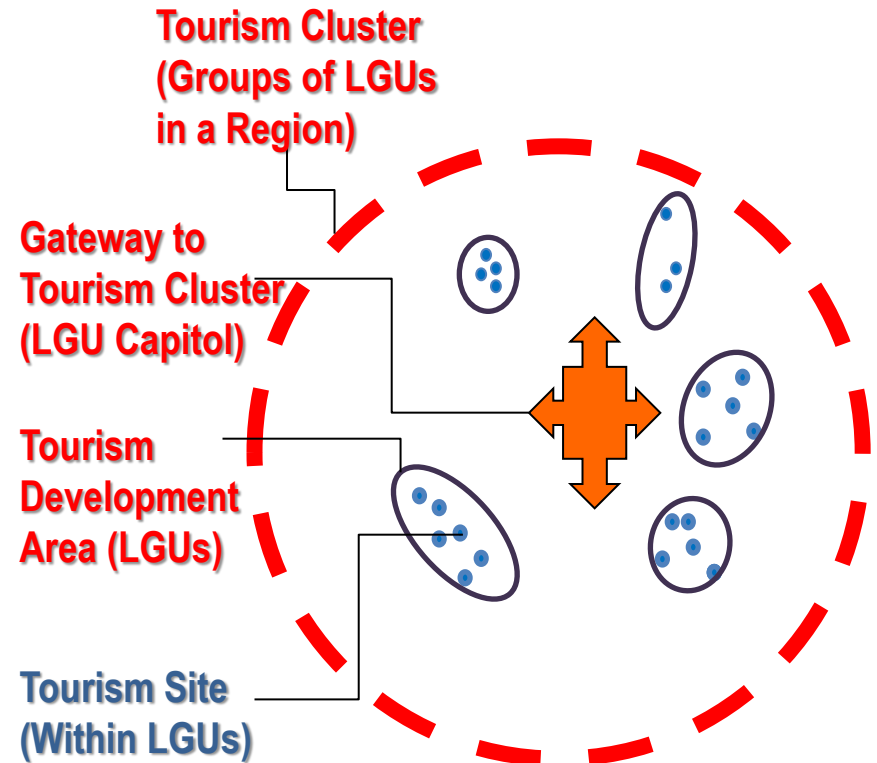
National Tourism Development Plan



Competitive Products and Destinations

Tourism Destination Framework and Selection Criteria

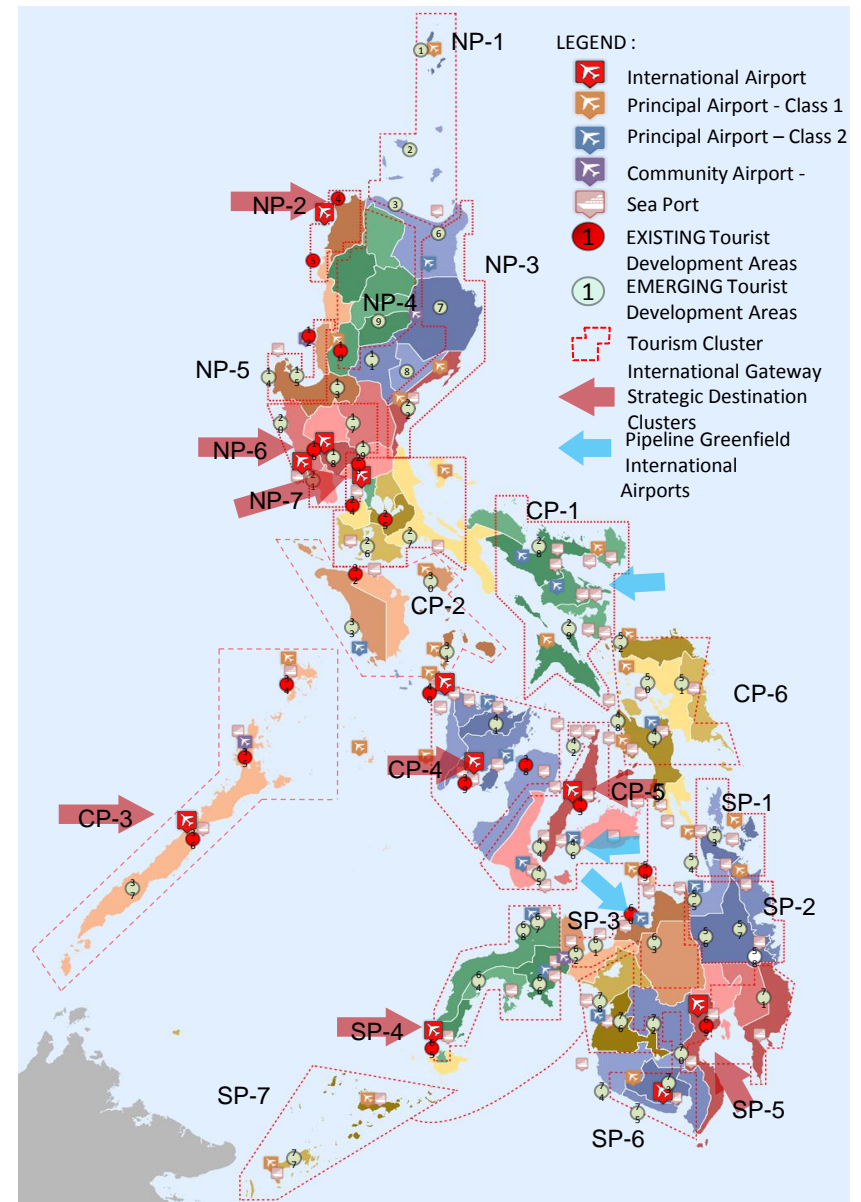
- ✓ market responsive
- ✓ inclusive
- ✓ consistent with existing Regional/LGU boundaries
- ✓ investment responsive
- ✓ measurable
- ✓ prioritizable



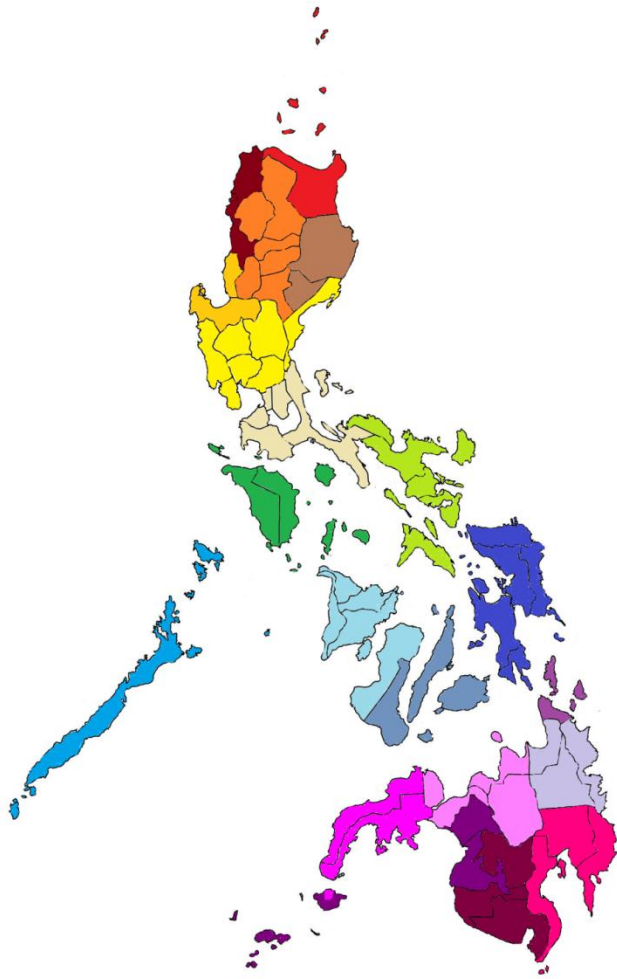
INCLUSIVE DESTINATION CONCEPT

20 strategic thematic tourism destination clusters covering 78 Tourism Development Areas

- ❑ 7 strategic clusters in Northern Philippines (North Luzon, CAR, CALABARZON, NCR) covering 27 tourism development areas
- ❑ 6 strategic clusters in Central Philippines (MIMAROPA, Bicol, The Visayas) covering 25 tourism development areas
- ❑ 7 strategic clusters in the Southern Philippines (Mindanao) covering 26 tourism development areas.



Competitive Products and Destinations

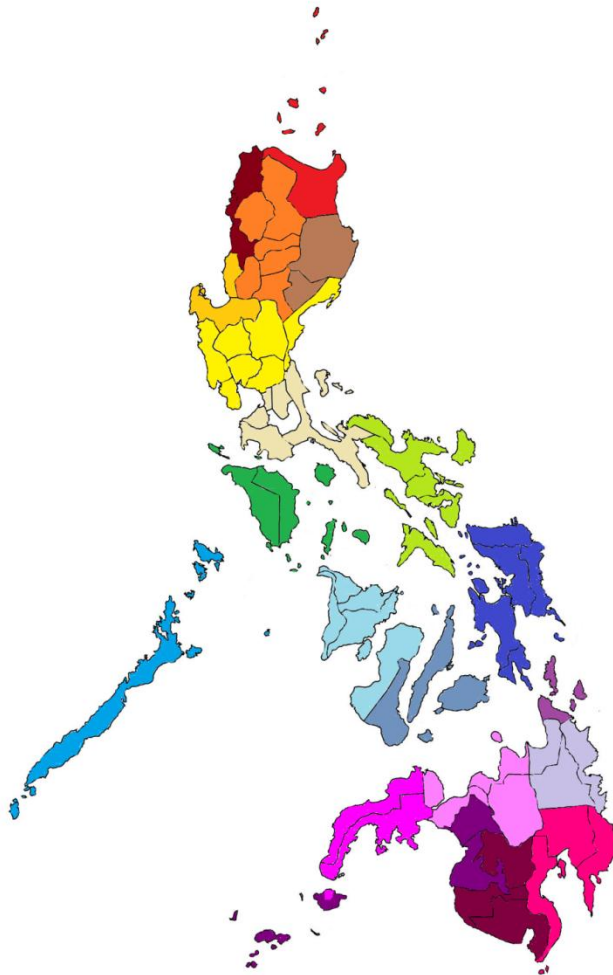


Tourism Cluster Strategy

- Diversify the tourism products
- Improve access
- Improve visitor facilities, maintenance and operation, and safety and security
- Restoration
- Raise product standards
- **Adopt more environmentally and socially approaches**
- Strengthen community participation



Competitive Products and Destinations



Product Portfolio

Nature Tourism

Cultural Tourism

Sun and Beach Tourism

Leisure & Entertainment
Tourism

MICE & Events Tourism

Health, Wellness, and
Retirement Tourism

Cruise & Nautical

Diving & Marine Sports
Tourism

Education Tourism



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LGU and Cluster Development

Develop and market competitive tourist products and destinations

- Prepare and integrate the Bohol Cluster Development Plan in the CDC and CLUP
- Conduct assessment and prepare inventory of product offering
- Adopt national standards for tourism facilities and services
- Facilitate private sector investment (e.g. BPLS)
- Adopt green practices in the development of tourism sites

**LGU as
ENABLER
for
destination
development**

- Promote environmentally and socially responsible tourism development
- Develop programs to link local communities to the supply chain
- Encourage private sector to adopt communities as part of CSR
- Work with private sector to sell packages in international and domestic travel fairs and investment forum



Formulation of a Local Planning Guide Book

- is aimed at assisting the LGUs develop their capabilities to formulate local tourism development plans
- envisioned to be a relevant tool that will enhance the capacity of the various planning agencies, organizations and individuals in assisting local government units in formulating their local sustainable tourism development plans
- ensures that LGU tourism personnel, development planners, policy makers, and other stakeholders have access to a user-friendly tool to aid the formulation of their respective local sustainable tourism development plans



Amarela Resort a model of sustainable resort development

The resort is located in Bohol province, one of the ecotourism destination in the country

- A recipient of ASEAN Green Hotel Award, our eco boutique resort
- An eco-friendly boutique resort offers a distinct hospitality that complements the beauty of Island
- It offers Filipino dishes made with vegetables and herbs organically grown in the resort



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Amarela Resort a model of sustainable development

- The resorts efforts towards sustainable development:
 - * Environment
 - Energy, Water Conservation
 - Waste Management
 - * Community
 - Community Projects
 - * Culture
 - Local Style, Encourage Local Artists and Art Forms, Heritage



Solar Panels



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Green Shade



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Dispensers



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Recycling of Old Wood



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Reed Bed



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Local Artists



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In conclusion:

- **Good policy framework on sustainable tourism development from national down to the local level**
- **Sustainable tourism development framework should be embedded in all planning process**
- **Sustainable tourism resort development covers 3 major areas:**
 - **Environment;**
 - **community and culture; and**
 - **good business model**





Thank you for your attention!



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