

THE NATIONAL TOURISM DEVELOPMENT PLAN 2023-2028

Annexes



TABLE OF CONTENTS

Glossary	4
Table Of Acronyms	8
Essentials	12
Key Concepts	12
The 10a Framework	14
Tracking the Recovery	23
Asean Drivers of Performance	28
Tourism and the UN Sustainable Development Goals	38
Sustainable Tourism Resources	40
Detailed Program Budgets	42
Product Development	70
Key International Events	70
Market Development	73
International Market Development	73
International Market Projections	86
Destination Development	88
Metropolitan, Key, Emerging, And Potential Destinations	88
Accommodation Demand	92
Guidelines for Tourism Rest Area Development	105
Policy Development	115
Proposed Amendments to the Tourism Act of 2009	115
Comparative Matrix Of Tourism Indicators Between Targets And Actual	120



GLOSSARY

Word	Definition
Accessibility	Transportation infrastructure and services available to support tourists traveling to and within a destination
Accommodations	Places where a tourist can stay for one or more nights while visiting the destination
Activities	Entertainment facilities and services that complement the Attractions
Administration	Measures adopted by stakeholders to manage the destination effectively including plans, policies, programs, regulations, zoning, and having an administrative framework that includes consultations
Advantages	Benefits that tourism should bring to the community, such as investment and jobs, improved infrastructure and better-managed environmental impacts, a revitalized local culture, and a sense of identity
Advertising	Promotion and marketing of a destination, building on the authentic representation of the place and its people, to ensure increasing knowledge and understanding of the site or destination for possible tourist markets
Amenities	Variety of facilities and services available in the destination to help improve the overall visitor experience
Area	Spatial context in which tourism assets can be clustered in terms of spatial and thematic connection

Word	Definition
Attractions	Tourism assets that attract tourists from a wide geographical area, often at national or international scales
Authenticity	An understanding of the place that builds on the locality's identity, and its sense of place, especially in relation to its natural and cultural assets
Autonomy	Ability to govern oneself
Biodiversity	Species and organisms in ecosystems
Blanket Travel Restrictions	A ban that applies to specific groups of people or certain conditions
Connectivity	Effective integration of destinations and their attractions through well-connected tourism circuits, utilizing various transportation modes and digital services, to enhance the overall tourism experience, reach more communities, and promote the country's unique Filipino branding and identity.
Convenience	Focusing on visitor-centric programs, streamlined entry processes, simplified travel, uniform health protocols, comprehensive destination information, improved transportation and facilities, and enhanced healthcare for reliable emergency care.
Culture	The way of life of people that encompasses values, traditions, practices, attitudes, beliefs, and properties whether in tangible or intangible forms



Word	Definition
Cultural Tourism	Experiencing the local history, architecture, religion(s), performing arts, visual arts, festivals, heritage sites, fashion, and other elements that shape their way of life
Digitalization	Integration and utilization of digital technologies and platforms to enhance the industry's operations, communication, marketing, and overall visitor experience
Digital Infrastructure	Physical resources and other related technologies that enable people to use devices, methods, systems, and processes
Digital Nomads	Individuals leverage digital technology to work remotely while traveling
Diversification	Expanding the range of products, services, and experiences offered to visitors, and tapping into various niche markets
Docent	A person who acts as a guide for tours
Ecotourism	Seeking new experiences and interaction with the local communities and its natural environment as differentiated from mere sightseeing
Enterprise	A profit-oriented business, company, or organization
Equality	Fair opportunities to develop tourism destinations, create and enhance tourism products, improve opportunities for livelihood and employment for tourism frontliners and Micro, Small and Medium Enterprises (MSMEs), and create better visitor experiences

Ethnolinguistic Group	A group of people who share a common ethnicity and language
Word	Definition
Expenditure	An amount of time, energy, effort, and funds that is used to acquire goods and services
Export	A good or service of a country that is sold into another country
Farm Tourism	A type of tourism development through its agricultural economy as a destination for outdoor recreation and rural life experiences spurred by the quest for natural and simple living with nature's bounty
Fauna	Animal kingdom
Fiesta	An event marked by festivities that are commonly fused with religious, historical, and cultural undertones to celebrate the rich heritage
Filipino Identity	Centered on genuine and diverse cultural experiences, while fostering holistic development of individuals, communities, and the nation
Flora	Plant kingdom
Gastronomy	The study of the relationship between food and culture
Geopolitics	Politics is influenced by geographical factors, especially in the context of international relations and economy
Global Competitiveness	Country's standing in the global tourism landscape
Global Tourism	The movement of goods, services, and people across the globe
Halal	Products, services, and conditions that adhere to Islamic law
Halal Tourism	Tourism offerings that abide by the rules of Islam for Muslims

(also known as Halal Travel, Halal-friendly Tourism, or Muslim-friendly Tourism)

Word	Definition
Heritage	Tangible and intangible properties that are transmitted by or acquired from a legacy or inheritance
Inbound Travel	Activities of a visitor from outside the country of residence
Indigenous	Originated from a particular environment or region
Indigenous Community	A distinct social and cultural group that shares collective ties to their natural and cultural resources
Imports	A good or service of a country that is brought into another country
Insurgency	A violent and armed rebellion or uprising against the government and/or civil authorities
Intra-ASEAN	Occurring within the Southeast Asian region
Landscape	Visible features of the country that are often characterized by land and water resources
Mass Tourism	A condition in which a large number of people travel to a specific location
Member state	A country that belongs to a political, economic, or trade organization
Metropolitan	A quality relating to a large city
Niche	A specialized market or segment of the population
Outbound Travel	Activities of residents traveling outside their country of residence and their usual environment

Overtourism A condition in which a particular place is congested and overcrowded due to excessive numbers of tourists

Word	Definition
Resilience	Capacity for communities and the nation to withstand and rebound from crises, utilizing the industry's potential as an engine of economic growth and equipping stakeholders with the necessary resources and knowledge
Revenge Travel	A surge in travel and tourism activities following a period of restrictions or limitations, driven by a desire to make up for lost time and experience a sense of liberation, especially after the COVID-19 pandemic
Revenue	The total amount of income generated by the sale of goods or services
Strategic Tourism Product	Tourism products that require investments in both physical and human resources, as well as improved linkages between different private and public stakeholders, before being considered competitive within the region
Sustainability	To achieve balanced development that considers the environment, economy, and society, fostering inclusivity and harmony
Topography	The arrangement of the natural and artificial physical features
Tourism	The movement of people to countries or places outside their usual environment for varying reasons, including recreation and business activities
Tourism Circuit	A route on which there are at least three major tourist attractions, such that none of these are in the same town or city, and these sites



are not separated by long distances

Word	Definition
Tourism Cluster	A destination development strategy pursues the linking of infrastructure projects, tourism entertainment and service centers, accommodation facilities, recreational and leisure areas as well as nature parks and heritage sites through a logical grouping of transportation networks that is centered on at least a primary gateway
Tourism Market	An arena where the flow of supply and demand of tourism products and services exists through different stakeholders

Word	Definition
Tourism Product	A defined experience of a specific place for a tourist that is shaped by component and incidental experiences that capture and deliver value for stakeholders
Tourism Receipt	Expenditures of all visitors in exchange for the goods and services they have acquired
Travel Bubble	An agreement between two or more countries to open up the borders for travel without strict health and safety protocols amidst the pandemic

TABLE OF ACRONYMS

Acronym	Definition
AE	Accommodation Establishments
ADB	Asian Development Bank
ADR	Average Daily Rate
AMS	ASEAN Member States
APEC	Asia Pacific Economic Cooperation
APIS	Advance Passenger Information System
ARMM	Autonomous Region in Muslim Mindanao
ASEAN	Association of Southeast Asian Nations
ACCSTP	ASEAN Common Competency Standards for Tourism Professionals
ASEAN-MRA	ASEAN Mutual Recognition Agreement
ATM	ASEAN Tourism Ministers
ATPMC	ASEAN Tourism Professional Monitoring Committee
AVR	Augmented and Virtual Reality
BARMM	Bangsamoro Autonomous Region of Muslim Mindanao
BBB Program	Build Build Build Program
BCPs	Business Continuity Plans
BIMP	Brunei Darussalam–Indonesia–Malaysia–Philippines
BMB	Biodiversity Management Bureau
BMS	Biodiversity Monitoring System
BOC	Bureau of Customs
BOQ	Bureau of Quarantine
BPO	Business process outsourcing
BSL	Biosafety Level

Acronym	Definition
BSHM	Bachelor of Science in Hospitality Management
BSTM	Bachelor of Science in Tourism Management
CALABARZON	Cavite, Laguna, Batangas, Rizal, and Quezon
CP	Visayas or Central Philippines
CAR	Cordillera Administrative Region
CAGR	Compounded Annual Growth Rate
CATC	Common ASEAN Tourism Curriculum
CATO	Certificates of Authority to Operate
CBD	Convention on Biological Diversity
CHED	Commission on Higher Education
CREATE	Corporate Recovery and Tax Incentives for Enterprises
DA	Department of Agriculture
DAO	DENR Administrative Order
DASTA	Designated Areas for Sustainable Tourism Administration (Thailand)
DCDs	Domestic Cluster Destinations
DENR	Department of Environment and Natural Resource
DFA	Department of Foreign Affairs
DICT	Department of Information and Communications Technology
DIY	Do It Yourself
DND	Department of National Defense
DOH	Department of Health
DOJ	Department of Justice



Acronym	Definition
DOST	Department of Science and Technology
DOT	Department of Tourism
DOTr	Department of Transportation
DPWH	Department of Public Works and Highways
DTI	Department of Trade and Industry Philippines
DTI-BOI	Department of Trade and Industry-Board of Investments
EIA	Environmental Impact Assessment
EPI	Environment Performance Index
EPIRA	Electric Power Market Structure and Electric Power Industry Reform Act
ESL	English as a Second Language
FDCP	Film Development Council of the Philippines
FDI	Foreign Direct Investment
FIES	Family Income and Expenditure Survey
GCDs	Gateway Cluster Destinations
GDP	Gross Domestic Product
GPI	Global Peace Index
GVA	Gross Value-Added
HEIs	Higher Education Institutions
HIA	Health Impact Assessments
HMOs	Health Maintenance Organizations
HSDV	Household Survey of Domestic Visitors
IA	Intramuros Administration
IATA	International Air Transport Association
IATF	Inter-Agency Task Force
IATF-EID	Inter-Agency Task Force for the Management of Emerging Infectious Diseases
ICAO	International Civil Aviation Organization

Acronym	Definition
ICT	Information and Communications Technology
IKSP	Indigenous Peoples and Communities and their Knowledge, Skills, and Practices
IMO	International Marine Organization
ITPB	Indonesia Tourism Promotions Board
IWRM Plans	Integrated Water Resource Management Plans
JAO	Joint Administrative Order
JCI-Accredited Facilities	Joint Commission International-Accredited Facilities
KBAs	Key Biodiversity Areas
KTOE	Kilotons of Oil Equivalent
LGU	Local Government Unit
LGSP-LED	Local Government Support Program for Local Economic Development
LTFRB	Land Transportation Franchising and Regulatory Board
MBCFI	Mindoro Biodiversity Conservation Foundation, Inc.
MCIA	Mactan-Cebu International Airport
MICE	Meetings, Incentives, Conferences and Exhibitions
MIDA	Malaysia Investment and Development Authority
MIDP	Maritime Industry Development Plan
MIMARO	Mindoro Occidental, Mindoro Oriental, Marinduque, and Romblon
MIMAROPA	Mindoro Occidental, Mindoro Oriental, Marinduque, Romblon, and Palawan
MOTS	Ministry of Tourism and Sports (Thailand)
MOTAC	Ministry of Tourism, Arts and Culture (Malaysia)
MOU	Memorandum of Understanding

Acronym	Definition
MSME	Micro, Small and Medium-Sized Enterprise
MST	Measuring Sustainability of Tourism
MTCE	Ministry of Tourism and Creative Economy (Indonesia)
MyCEB	Malaysia Convention & Exhibition Bureau
NAIA	Ninoy Aquino International Airport
NCR	National Capital Region
NCCA	National Commission for Culture and the Arts
NCIP	National Commission on Indigenous Peoples
NCMF	National Commission on Muslim Filipinos
NDHS	National Demographic and Health Survey
NEDA	National Economic and Development Authority
NES	National Ecotourism Strategy
NESAP	National Ecotourism Strategy and Action Plan
NGAs	National Government Agencies
NHCP	National Historical Commission of the Philippines
NICTHS	National ICT Household Survey
NIPAS	National Integrated Protected Areas System
NM	National Museum
NP	Luzon or Northern Philippines
NPDC	National Parks Development Committee
NPF	Nayong Pilipino Foundation
NTO	National Tourism Organization
NTPB	National Tourism Professional Board

Acronym	Definition
NTDP	National Tourism Development Plan
NWRB	National Water Resources Board
ODA	Official Development Assistance
OFW	Overseas Filipino Workers
OPMD	Office of the Product and Market Development
OWWA	Overseas Workers Welfare Administration
OWWA-NCRO	Overseas Workers Welfare Administration – National Reintegration Center for OFWs
PACEOS	Philippine Association of Convention/Exhibition Organizers and Suppliers
PADI	Professional Association of Dive Instructors
PATA	Pacific Asia Travel Association
PCSD	Palawan Council for Sustainable Development
PCSSD	Philippine Commission on Sports SCUBA Diving
PBSAP	Philippine Biodiversity Strategy and Action Plan
PDP	Philippine Development Plan
PGN Bridge	Panay-Guimaras-Negros Bridge
PhilHealth	Philippine Health Insurance Corporation
PHQuaR	Philippine Qualifications Register
PICC	Philippine International Convention Center
PNP	Philippine National Police
PPP	Public-Private Partnership
PQF	Philippine Qualifications Framework
PRA	Philippine Retirement Authority
PRC	Professional Regulation Commission
PSA	Philippine Statistics Authority



PSALM Power Sector Assets and Liabilities Management Corporation

Acronym	Definition
PSRTI	Philippine Statistical Research and Training Institute
PSSA	Particularly Sensitive Sea Area
PTB	Philippine Tourism Promotions Board
PTSA	Philippine Tourism Satellite Accounts
PWSSMP	Philippine Water Supply and Sanitation Master Plan
RA	Republic Act
RNTDP	Reformulated National Tourism Development Plan
RO-RO	Roll-On/Roll-Off Ships
RTE	Registered Tourism Enterprise
RTPBs	Regional Tourism Promotions Boards
SP	Mindanao or Southern Philippines
SDG	Sustainable Development Goals
SEA	Southeast Asia
SIPP	Strategic Investment Priority Plan
SOCCSKSARG EN	South Cotabato, Cotabato, Sultan Kudarat, Sarangani and General Santos City
STB	Singapore Tourism Board
STEP	Special Training for Employment Program
STI	Science, Technology, and Innovation
SWOT	Strengths, Weaknesses, Opportunities, and Threats

Acronym	Definition
TAT	Tourism Authority of Thailand
TCP	Tourism Congress of the Philippines
TDA	Tourism Development Area
TDGVA	Tourism Direct Gross Value Added
TESDA	Technical Education And Skills Development Authority
TEZs	Tourism Enterprise Zones
TIEZA	Tourism Infrastructure and Enterprise Zone Authority
TOPS	Tourism-Oriented Policing Services
TPB	Tourism Promotion Board
TPC	Tourism Promotion Council
TRA	Tourism Research Australia
TRO	Temporary Restraining Order
TTF	Tourism Task Force
UST	University of Santo Tomas
UWRP	Unified Vehicular Volume Reduction Program
WED	World Environment Day
WHO	World Health Organization
WTO	World Tourism Organization
WUTBS	World University and Tourism Business Schools
WWF	World Wildlife Fund
ZOD	Zero Open Defecation

ESSENTIALS : KEY CONCEPTS

We define here various essential concepts. These definitions have been adopted and paraphrased from authoritative sources – such as the United Nations World Tourism Organization, among others – but have also been adapted to the Philippine context of tourism planning and development, duly referring to and adapting from previous National Tourism Development Plans or the Tourism Act of 2009.

Tourism comprises the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business, and other purposes not related to the exercise of an activity remunerated from within the place visited. A **tourist** is one who generally stays at least overnight at the destination, while one who does not stay overnight is an **excursionist**. Collectively, these travelers are called **visitors**. Within this Plan, these terms may be used interchangeably.

A **Tourism Destination** involves a large geographic area that has a distinct identity in the minds of tourists. As such it may comprise of one or more cities or towns, but more often is a province, region, or country. However, the essential element is not so much whether it falls within the political boundaries of a local government unit, but whether it has a sense of place of its own. **Tourism Sites** are specific places within a destination that are of interest to a tourist. They may be of interest for their natural, cultural, leisure, entertainment, or other values. A **Tourism Circuit**, on the other hand, is a coherently organized series of major and minor tourism sites, with one or more service hubs or nodes, that are geographically and/or thematically linked to each other by a transportation route. A circuit can be thought of as a route that a potential tourist (and their tour guide) may follow to get a sense of the destination and how it should be experienced. It might provide a taste of the diversity of experiences in a locality, or go into greater depth into a specific theme, such as its natural attractions, historic sites, or food establishments, for example.

A **Tourism Development Cluster (TDC)** involves a large geographic area, often spanning one or more administrative regions or significant parts thereof, with a sufficient number and range of existing and potential tourism sites and experiences with the institutional, social, economic, infrastructural, and environmental capacity to meet long term development possibilities. It would have a contiguity of land and sea areas, a “gateway” and service centers, networks for transportation, utilities, and public services, and particular characteristics to develop an identity for the area as a destination. A **service center** is a component of the tourism cluster that provides accommodations, amenities, and other needs of the tourist, often an urban area, provincial or regional center where many of the goods and services needed by travelers can be readily purchased. In the Philippine context, a TDC provides the strategic and coordinative framework for tourism development, specifically through Tourism Development Areas.



A **Tourism Development Area (TDA)** consists of a geographical area, generally consisting of a town, city, or province, with one or more existing or potential tourism sites, that yet have the potential for further tourism development. TDAs form the component units to focus and coordinate in specific areas the development strategy of a tourism cluster. In the Philippine context, this is usually defined as a local government unit, since it would have the appropriate powers, responsibilities, and resources to coordinate, manage, and direct development.

A **Tourism Enterprise** refers to facilities, services, and attractions involved in tourism, including but not limited to travel and tour services; land, sea or air tourist transport services; tour guides; adventure sports services and other sports activities of significant tourism potential; meetings, incentives, conventions, events, and exhibitions organizers; accommodation establishments; tourism estate management services; and others, such as restaurants, retail establishments, sports and recreational centers, spas and wellness establishments, museums and galleries, theme parks, convention centers, cultural centers, zoos, among others. In the Philippine context, the Department of Tourism has the power to add other enterprises to this list.

ESSENTIALS : THE 10A FRAMEWORK

INTRODUCTION

The **10A Framework** was developed by TwoEco in the course of its tourism planning practice to provide a structure for evaluating the readiness of a destination, or the completeness of its tourism clusters, circuits, or products. It ensures that different dimensions are included in the analysis and allows planning recommendations to cover these dimensions, approaching the tourism experience in a holistic manner.

The 10A Framework is included as part of the National Tourism Development Plan to assist stakeholders in developing better tourism experiences, and to guide the Department of Tourism and its attached agencies in evaluating the readiness of destinations, identifying dimensions for improvement, or assessing the viability or appropriateness of government interventions in a locality.

The **10A Framework can be used with other analytical tools** (such as SWOT or PESTLE) to provide broader and deeper insights into the destination's physical assets, the effectiveness of the management practices in place, the impact on the local community and the environment, and the sustainability of the tourism industry over the long term.

The **10A Framework is built off and expands from the classic 5A's of Tourism** (Dickman, 1996), which are:

1. **Attractions**
2. **Accommodations**
3. **Accessibility**
4. **Activities**
5. **Amenities**

These 5A's tend to focus on the core, often physical developmental side, of tourism – i.e., the improvement of sites, and the building of facilities – in creating a tourism experience.

This approach, unfortunately, fails to fully capture the human and contextual dimensions of tourism, especially within the context of responsible and sustainable tourism – the roles of government and the community, the respect for the environment and local culture, and the need for marketing and promotions, among others. As such, we have expanded on the classic formula to properly capture critical aspects of tourism development that have not been covered in the first 5A's but which we believe are increasingly relevant in the current drive for identity, sustainability, resilience, and competitiveness. The additional A's we employed in our analytical framework are:

6. **Area**



- 7. **Authenticity**
- 8. **Administration**
- 9. **Advantages**
- 10. **Awareness**

Each of these is defined and explained in the context of tourism destination planning below.

THE 10A FRAMEWORK

1. Attractions refer to tourism assets that draw tourists from a wide geographical area, often at national or international scales. Tourist attractions are often places of culture, nature, or particular experiences, that draw people to visit a destination. These can come in various forms such as:

- a) **Natural attractions**, such as mountains, islands or beaches, coral reefs, forests, or other ecosystems, landscapes, and seascapes of natural beauty, biodiversity, or other values.
- b) **Places of culture or heritage**, such as communities and their festivals, farms, food and culinary traditions, traditional and non-traditional performing arts (theater, dance, and music), traditional and non-traditional arts and crafts, as well as museums and cultural centers, historic and heritage sites, and interpretive centers.
- c) **Built-up areas and facilities**, such as those for recreation and leisure, amusement parks, sports centers, convention centers, or commercial areas for shopping and entertainment, as well as those for more focused or tailored experiences, such as for education, health, and wellness, among others.

Some attractions exist at the intersection of these different types of attractions. For instance, an agritourism site has the outdoors-oriented characteristics of nature tourism but also often embodies communities' cultural practices. Nature-oriented sites may also include expressions of local cultural communities or may be untouched by humans, yet be deeply culturally even spiritually, significant to a community. Amusement parks may be nature-oriented, involving outdoor adventures, or a beach area may include a leisure and recreation complex.

Attractions may be further classified into how powerful they are in drawing tourists. Some attract an international audience, often recognized with various awards or designations, such as UNESCO World Heritage Sites, while others are of national or local significance. Crucial to the viability of a destination is having compelling attractions that, over time, generate sufficient interest for the growth of markets.

Guide Questions for Assessing Attractions:

- What brings tourists to the area?
- What are the existing and potential tourism attractions in the area?
- Which are the major and minor attractions in the area?
- Are the attractions natural, cultural, or built?

Metrics / Considerations for Assessment

- Quality of attractions
- Number of attractions

- Existing and potential visitor volume and source markets
- Visitor/Local/DMO satisfaction survey
- Carrying capacity of attractions

2. **Accessibility** refers to the transportation infrastructure and services available to support tourists traveling to and within a destination. Accessibility thus looks at the ease of traveling from a source market to the destination. Factors that affect accessibility include the location and condition of key gateways – whether by land, air, or sea – the condition and connectivity of transportation networks, and the ease of travel to, from, and within a destination. It includes understanding the number of connections, the ease of getting and changing modes of transportation, and even the documentary requirements (visas, security, or health permits) to enter and move around.

Crucial to the ramping up of tourism in a destination is increasing its accessibility to more people, by improving transportation infrastructure such as roads and railways, as well as airports and seaports, and the public and private vehicles that use the infrastructure, but within the limits of what the local community, culture, and environment can support. Improving accessibility would require dedicated effort by the public and/or private sector in investing in the necessary and appropriate infrastructure and transportation services.

Guide Questions for Assessing Accessibility

- How conveniently does one get to the destination?
- Are there travel connections between the source and destination?
- What modes of transportation serve the area? Are they convenient and safe?
- What documents are needed to enter the destination? Are they easy to obtain?

Metrics / Considerations for Assessment

- Transport modes available from source to destination
- Gateways available (Airport? Seaport? Highway? Train or bus terminal?)
- Travel time, cost, and connections from source markets to gateway
- Quality of transport facilities
- Transport modes available within the destination
- Quality of transport facilities within the destination
- Travel time, cost, and connections from a gateway to accommodations and attractions
- PWD readiness of transportation facilities
- Presence and ease of obtaining documentary requirements for entering a destination
- The presence of visible and understandable signs for visitors to find their way around a destination

3. **Accommodations** refer to places where tourists can stay for one or more nights while visiting the destination. Since a tourist, by definition, stays at least overnight in a destination, accommodations are a crucial part of tourism.

Accommodations include staying at hotels and resorts, hostels and inns, short-term rentals, homestays, and even at friends' and relatives' places. For tourism to properly develop, the volume and kind of accommodations need to grow and evolve alongside (or even ahead of) the growth and evolution of tourism markets. New destinations often start with same-day visitors, then the



introduction of homestays or small inns, and the introduction and development over time of more formal accommodations.

Accommodations are also crucial links in the value chain. Tourists spend a lot on their accommodations, and the accommodation facility in turn employs many people and purchases a lot of other goods and services, ensuring that tourism spending circulates in the economy.

Guide Questions for Assessing Accommodations

- Where will visitors stay?
- Are there enough facilities?
- What variety of facilities is available?
- Do the available facilities match the needs and expectations of existing and potential visitors?

Metrics / Considerations for Assessment

- Number of accommodations in an area
- Number of beds and rooms
- Occupancy rates
- Pricing rates
- Facilities and services offered by each establishment
- Accreditation and rating of accommodations
- PWD readiness of facilities
- Visitor/Local/DMO satisfaction survey

- 4. Activities** refer to the other facilities and services that complement the Attractions. Many activities happen at key attractions – these might be understood as the programming that allows a visitor to better experience one or more attractions (such as sightseeing or going on hikes at a nature park or going on guided tours to several attractions). Activities would also include more general behavior by tourists that nevertheless have an impact on the locality, such as shopping at districts and malls, visiting bars, restaurants, and cafés, interactions with residents, or entering culturally or environmentally sensitive locations that may not be tourist attractions. For example, at a beach attraction, activities might consist of hanging out at the beach, swimming, and engaging in water sports. That same beach attraction might also be supported by areas for shopping, as well as restaurants and cafes for eating, among others.

Identifying these activities is essential for properly measuring and regulating the economic, environmental, or socio-cultural impact of visitors on the local community. Being aware that tourists go shopping in certain areas, for example, could prompt greater training for shop owners and salespersons to address tourists' inquiries better, as well as the provision of bank services and money changers, increased monitoring for public safety and taxation, and infrastructure investments in urban design, walkability, and waste management are also things to be considered.

Guide Questions for Assessing Activities

- What will tourists do at each attraction?

- What are the other different experiences tourists can enjoy in other places at the destination?
- Are there appropriate measures for safety, hygiene, and cleanliness?
- Do the activities respect the local community and their environment?

Metrics / Considerations for Assessment

- The financial cost of doing the activity
- The required equipment, personnel, infrastructure
- Environmental or community impact of the activity
- The frequency at which the activity can be enjoyed and by how many people
- Safety measures for conducting the activity
- PWD readiness of facilities
- Visitor/Local/DMO Satisfaction Survey

5. Amenities refer to all the other public and private sector services and facilities that contribute to the visitor experience. In many cases, these often pertain to services and facilities that may already (or should) exist at destinations but are often oriented to the resident population.

These may range from the provision of public toilets and other hygiene facilities, the availability of bank services and money changers, the accessibility of emergency health facilities or public safety services, or the provision of power, telecommunications, and internet services. It also includes general commercial and retail services, from malls and restaurants to mobile phone repair services and internet shops, as well as local sports and entertainment facilities, such as gymnasiums or theaters.

Planning effectively for tourism requires that the impact or demand from tourists on these services be added to that of residents.

Guide questions for assessing Amenities

- Is the infrastructure for power and telecommunications adequate?
- Are the services for water, sewage, and waste adequate?
- Are there health care and social welfare facilities available?
- Are there facilities for commercial services such as groceries, convenience stores, and malls, available?
- Are there banks, ATMs, and money changers?
- What other amenities are needed to improve the tourism experience?

Metrics / Considerations for Assessment

- Quality and maintenance of tourism facilities
- Number of public toilets available
- Number of ATMs, and banking services available
- Number of commercial establishments (convenience stores, groceries, pharmacies, formal and informal stores)
- Distance of commercial establishments from attractions and accommodations
- Mobile signal availability and strength



- Internet signal availability and speed
- Water supply and quality; frequency of water interruption
- Power supply; frequency of power interruptions
- Adoption and use of Renewable energy
- Visitor/Local/DMO Satisfaction Survey
- Elderly and PWD facilities
- Number of police stations/security outposts

6. Area refers to the pattern in which the first 5A's are distributed in a destination. Planning for tourism requires understanding and seeing how existing and potential sites, facilities, and services are arranged and located in the area, and analyzing how people might move from site to site. This analysis will in turn aid in coming up with recommendations on how to make movement easier and in developing tourism circuits or networks.

The area allows us to see whether different tourism sites, facilities, or services are grouped or clustered in particular areas. It also allows us to explore if different sites, facilities, and services have common themes that allow them to be developed as a tourism product. Area also allows us to see how sites, facilities, and services are connected, and identify if certain elements are missing in a particular area.

For example, several attractions and facilities that are clustered in a forested mountainous region can form the core of a nature-based tourism experience, and the common theme of a forest/mountain experience can anchor a tourism circuit to link them together. This clustering of tourism assets helps define the identity of a destination and attracts target markets more efficiently. But since Area also asks us to see how these assets are connected, we can also see whether services and facilities – like accommodations, amenities, and accessibility – are available or connected to the cluster. Seeing these connections reduces wasted time and resources in traveling in a disorganized manner and improves the tourist's experience of a place.

Guide Questions for Assessing Area

- Where are the attractions located?
- Do they form clusters or have common themes?
- Are there minor attractions, activities, accommodations, and amenities that are connected to or clustered with a major attraction?
- Can circuits be developed from the attractions and various facilities and services available at the destination?

Metrics / Considerations for Assessment

- Geography/environment of the area
- Location of Protected Areas and Ancestral Domains
- Proximity of tourism assets to each other
- Proximity of tourism destinations to urban centers and gateways
- Travel time between tourism assets
- Identifying clusters, themes, and existing and potential circuits

- 7. Authenticity** refers to an understanding of the place that builds on the locality’s identity, and its sense of place, especially in relation to its natural and cultural assets. Authenticity in tourism respects and conserves natural and cultural sites and practices.

Facilities, even as they strive to meet and exceed standards of performance and service, should be built and designed in a way that is appropriate to the landscape, while incorporating elements of the local culture. Beachfront and mountain resorts and other facilities, for example, do not exceed the height of the surrounding trees, maintain large areas for the natural growth of plants and the movement of animals, and follow the natural contours of the landscape. Restaurants strive to incorporate local ingredients and cuisine into their menus. Facilities use the products and cultural design elements from and with the involvement of local communities, such as handicrafts and fabrics.

More importantly, experiences are developed authentically – tour guides and tourism materials should use the best available and most authoritative research in telling stories about a place, or festivals, costumes, and events. They are truthful about their origins or development. Similarly, experiences of the natural environment should require minimal intervention, except for the reasonable needs of safety and enjoyment, and should enhance local biodiversity whenever possible.

Authenticity recognizes the need to accept change and modernity, but it does so in a manner that respects the natural and cultural attributes of a place while managing impacts when possible.

Guide Questions for Assessing Authenticity

- What are the ethnic or indigenous groups present in the destination?
- What is the environmental or cultural context of the area?
- Does the environmental or cultural context have relevance to tourism?
- How do the environment and culture in the area shape the identity of the place?
- What is the history of the community?
- What do the local festivals commemorate?
- Does the tourism program reflect that identity?
- Has cultural mapping been conducted?
- Is the natural landscape respected?
- Are there (existing or potential) attractions under the ancestral domain?
- How is the cultural landscape respected?

Metrics / Considerations for Assessment

- Physical design regulations and guidelines in local ordinances
- Existing (historically significant) structures
- Number, area, and kind of protected areas
- Conservation measures implemented
- Cultural mapping completed
- Conservation management plans completed
- Protected area management plans completed
- Local awareness survey



- 8. Affinity** involves connecting and communicating the identity of a place to tourists. Building off of an authentic sense of place, affinity thus transforms authenticity into a message that is communicated on all platforms – from street signs to apps, brochures, and tourist guide training, among others, to the promotion and marketing of a destination. It also involves using that message to connect the destination and its products to its markets, while building on the authentic representation of the place and its people. Communicating with the visitor through various means also deepens the visitor experience.

Guide Questions for Assessing Affinity

- Does the destination have a clear brand?
- How does that brand relate to an authentic sense of place of the destination?
- Are the products of the destination consistent with an authentic brand?
- What materials and platforms are used to promote the destination?
- Do the destination's products and promotions strategies properly reach their target markets?
- Does the destination communicate an authentic brand through various materials, including signs and markers, maps, and leaflets, among others?
- Have any of the attractions received recognition awards internationally?
- What is the destination's OTOP? (One Town, One Product)
- How is the destination's OTOP featured in its tourism products?

Metrics / Considerations for Assessment

- The existence of a promotions plan and destination brand
- Branding usage guidelines
- Guidelines for wayfinding devices
- Social media engagement and reach
- Website reach
- Google Trends insights
- Visitor awareness survey
- Visitor arrivals

- 9. Administration** involves all the measures adopted by stakeholders to manage the destination effectively. It includes plans and policies, programs and regulations, having skilled administrators and staff, and engagements with identified stakeholders, among others.

It often involves one or more government offices, but also should include other entities, such as the private sector, civil society groups, residents, and marginalized stakeholders, among others. It is operationalized, not merely in regulations, plans, or programs, but also through implementational, monitoring, and evaluation mechanisms. Goals, such as managing environmental and socio-cultural impact, while maximizing economic gains, are identified, defined, and attained.

Guide Questions for Assessing Administration

- Are there institutional arrangements to adopt and implement programs?
- Do key stakeholders have the relevant authority and training to implement programs?

- Government, private, NGO, collaboration?
- Legal or policy framework?
- Regulation of safety, environment, culture?

Metrics / Considerations for Assessment

- Tourism code
- Tourism development plan
- Conservation management plan (if applicable)
- Tourism office and staffing
- Ordinances and local policies related to tourism
- Number of active stakeholders
- Frequency of stakeholder meetings
- Percentage of accredited tourism enterprises
- Health and safety protocols implemented
- Disaster and risk reduction management measures in place

10. Advantages refer to the benefits that tourism brings to the community, such as investment and jobs, improved infrastructure and better management of environmental impacts, a revitalized local culture, and a sense of identity. Linked to administration, advantages identify the specific strategies by which the host community benefits from tourism. It may include programs that promote local employment, including educational initiatives to strengthen the human resource base for the industry. It can include policies that mandate tourism enterprises to support local producers, or strategies by which the local environment is enhanced, through tree planting activities, and cleanups, among others.

Guide Questions for Assessing Advantages

- How does the community benefit from tourism?
- Income and jobs?
- MSMEs supported by tourism?
- Cultural exchanges and expressions?
- Improved infrastructure and services?

Metrics / Considerations for Assessment

- Number of locals employed by tourism businesses
- Number of MSMEs related to tourism
- Employment rate
- New facilities constructed per year
- Additional income provided by tourism
- Gender and Development programs
- Local perception of tourism survey
- Training and capacity-building activities conducted



ESSENTIALS : TRACKING THE RECOVERY

TOP TOURISM TRAVEL DESTINATIONS

From 2018 to 2021, even during the midst of the pandemic, France was the world's most visited destination, peaking in 2019 with 90.9 million visitors, as shown in Table 1. However, the trend shifted in 2022 as Spain surged ahead with 71.7 million arrivals, overtaking France. The preeminence of European countries as the top global tourism destinations is evident, with a majority in the top 10 of tourist arrivals coming from this region even during the pandemic.

The year 2022 witnessed a huge surge in tourists across all the top travel destinations as countries began reopening. Notably, half of the top 10 destinations exhibited a triple-digit growth rate percentage. Yet, it is important to note that these figures, while promising, have not yet returned to the levels seen before the pandemic.

Contrastingly, in the Asian context, only China and Thailand managed to carve their positions among the world's top tourism hubs before the pandemic. China clinched the 4th spot globally in 2018 and 2019, while Thailand secured the 10th position in 2018 and the 8th in 2019. However, both these countries have struggled to regain their spots in the top 10 since the onset of the pandemic, largely due to the closure of China and other East Asian countries to both outbound and inbound international travel during much of this period. Notably, the United Arab Emirates stands out as the lone Asian nation that is present among the top tourism destinations during the pandemic, earning a spot in the top 10 for the year 2021.

Table 1. Top Travel and Tourism Destination

2018			2019			2020			2021			2022		
Country	Arrivals	Growth Rate	Country	Arrivals	Growth Rate	Country	Arrivals	Growth Rate	Country	Arrivals	Growth Rate	Country	Arrivals	Growth Rate
France	89.4	2.9	France	90.9	1.7	France	41.7	-54.1	France	48.4	16.1	Spain	71.7	130
Spain	82.8	1.1	Spain	83.5	0.8	Italy	25.2	-61.0	Mexico	31.9	31.2	France	66.6	38
USA	79.7	3.3	USA	79.4	0.6	Mexico	24.3	-46.1	Spain	31.2	64.7	USA	50.9	130
China	62.9	3.6	China	65.7	4.5	USA	19.2	-75.8	Turkey	29.9	88.3	Turkey	50.5	69
Italy	61.6	5.7	Italy	64.5	4.8	Spain	18.9	-77.3	Italy	26.9	6.7	Italy	49.8	85
Turkey	45.8	21.7	Turkey	51.2	11.9	Turkey	15.9	-69.0	USA	22.1	15.0	Mexico	38.3	20
Mexico	41.3	5.1	Mexico	45.0	9.0	Austria	15.1	-52.7	Greece	14.7	99.4	UK	30.5	414
Germany	38.9	3.8	Thailand	39.9	4.3	Germany	12.4	-68.5	Austria	12.7	15.7	Germany	28.5	144
UK	38.7	-2.2	Germany	39.6	1.8	UK	10.7	-83.2	Germany	11.7	-6.1	Greece	27.8	89
Thailand	38.2	7.3	UK	39.4	1.9	Poland	8.4	-72.8	UAE	11.5	60.2	Austria	26.2	106

Note: Arrivals are in millions and growth rates are in percentage

Source: UNWTO Tourism Data Dashboard and Annual WTTC Travel and Tourism Economic Impact Report

GLOBAL AND REGIONAL TOURISM RECOVERY

Across all regions in the world, inbound travel has been on a gradual upward trajectory of recovery from the initial impact of the start of the pandemic. This movement, however, has yet to fully return to the levels observed before the crisis, as evident from the data presented in Table 2. On a global scale, the arrivals figures of 2022 are still 34.3% below that of 2019, but a significant improvement from the level of 2020, which was 72.2% below that of 2019.

For 2022, the Asia-Pacific region was still 72.1% below 2019 levels, and in the ASEAN region, it was down by 66.2%. In the Middle East and Europe, these regions inching closer to their pre-pandemic visitor numbers, being just 10.3% and 20.1% below 2019 levels, respectively.

In terms of global economic impact, tourism receipts for 2022 were 31% below 2019 levels, a consistent reflection of the percentage difference in tourist arrivals. This correlation holds in the Asia-Pacific as well, where the region was 70.2% below its pre-pandemic tourism receipts. Meanwhile, Africa had managed to not only rebound but also surpass its pre-pandemic tourism receipts figures by 4.5%.

However, for the Middle East, even as its arrivals were approaching pre-pandemic levels, it lagged significantly in terms of reclaiming its pre-pandemic tourism receipts, facing a difference of over 90%.

Country/Region	2019	2020	2021	2022	2019-2020	2020-2021	2021-2022
	Inbound Arrivals (in millions)				vs. 2019 figures (in percent)		
Global	1465.46	406.89	455.77	962.8	-72.2%	-68.9%	-34.3%
The Americas	219.32	69.61	81.49	155.61	-68.3%	-62.8%	-29.0%
USA	79.44	19.21	22.1	50.87	-75.8%	-72.2%	-36.0%
Canada	22.15	2.96	3.06	12.82	-86.6%	-86.2%	-42.1%
Europe	743.91	239.63	304.88	594.53	-67.8%	-59.0%	-20.1%
Middle East	73.02	19.82	29.91	65.51	-72.9%	-59.0%	-10.3%
Africa	69.06	18.7	19.65	46.53	-72.9%	-71.5%	-32.6%
Asia Pacific	360.15	59.12	24.85	100.52	-83.6%	-93.1%	-72.1%
Southeast Asia	138.51	25.43	3.25	46.85	-81.6%	-97.7%	-66.2%
Brunei	0.33	0.06	0	-	-81.8%	-100.0%	-
Cambodia	6.61	1.31	0.2	2.28	-80.2%	-97.0%	-65.5%
Indonesia	16.1	4.05	1.56	5.47	-74.8%	-90.3%	-66.0%
Malaysia	26.1	4.33	0.13	10.07	-83.4%	-99.5%	-61.4%
Philippines	8.26	1.48	0.16	2.65	-82.1%	-98.1%	-67.9%
Singapore	19.12	2.74	0.33	6.31	-85.7%	-98.3%	-67.0%
Thailand	39.87	6.7	0.43	11.15	-83.2%	-98.9%	-72.0%
Vietnam	18.01	3.84	0.16	3.66	-78.7%	-99.1%	-79.7%
	Inbound Tourism Receipts (in billions of USD)				vs. 2019 figures (in percent)		
Global	1466.5	549.8	626.8	1011.5	-62.5%	-57.3%	-31.0%
The Americas	330.6	125.4	140.3	243.9	-62.1%	-57.6%	-26.2%
USA	199	72.5	70.2	135.2	-63.6%	-64.7%	-32.1%
Canada	29.8	13.6	14.5	24	-54.4%	-51.3%	-19.5%
Europe	584.3	249.3	327.4	548.6	-57.3%	-44.0%	-6.1%
Middle East	992	43.5	62.5	75.9	-95.6%	-93.7%	-92.3%
Africa	11.2	5.4	6	11.7	-51.8%	-46.4%	4.5%
Asia Pacific	441.2	126.2	90.6	131.4	-71.4%	-79.5%	-70.2%
Southeast Asia							
Brunei	0.2	0	0	-	-100.0%	-100.0%	-



Table 2. Global and Regional Tourism Recovery Figures

Country/Region	2019	2020	2021	2022	2019-2020	2020-2021	2021-2022
Cambodia	4.8	1	0.2	-	-79.2%	-95.8%	-
Indonesia	16.9	3.4	0.5	6.7	-79.9%	-97.0%	-60.4%
Malaysia	19.8	3	0.1	6.3	-84.8%	-99.5%	-68.2%
Philippines	9.8	1.8	0.6	4.2	-81.6%	-93.9%	-57.1%
Singapore	20.3	5.4	4.1	11.8	-73.4%	-79.8%	-41.9%
Thailand	59.8	13.4	5.1	-	-77.6%	-91.5%	-
Vietnam	11.8	2.5	0.1	3.8	-78.8%	-99.2%	-67.8%

Source: UNWTO Tourism Data Dashboard and Annual WTTC Travel and Tourism Economic Impact Report

TOURISM ARRIVALS IN ASIA

In the year 2022, a significant surge in tourism arrivals has been experienced across Asia, as seen in Table 3. All countries within the ASEAN in particular have recorded a four-digit increase in growth rates from 2021 to 2022, except for Indonesia, which displayed a relatively robust yet comparatively modest increase of 251%. Malaysia, in particular, has experienced the highest growth, boasting a growth rate of 7,646%.

This increase can be attributed to a convergence of factors, including the implementation of rigorous regulations in the preceding year, coupled with the relaxation of travel restrictions throughout 2022. However, even amidst this pronounced upsurge in ASEAN, the Middle East was the most visited Asian region in 2022. The United Arab Emirates and Saudi Arabia were the main reasons for heightened tourist activity in that year, with arrivals of 22.65 million and 16.51 million visitors, respectively.

Table 3. Tourism Arrivals in Asia

Country	International Tourist Arrivals (in millions)					Tourist Arrivals Growth Rate (in percentage)			
	2018	2019	2020	2021	2022	2018-2019	2019-2020	2020-2021	2021-2022
Western Asia/Middle East									
Armenia	1.65	1.89	0.36	0.88	1.67	15%	-81%	144%	90%
Azerbaijan	2.61	2.86	0.52	0.46	-	10%	-82%	-12%	n/a
Bahrain	12.05	11.06	1.91	2.17	3.71	-8%	-83%	14%	71%
Cyprus	3.94	3.98	0.63	1.94	3.20	1%	-84%	208%	65%
Georgia	4.76	5.08	1.09	1.58	3.65	7%	-79%	45%	131%
Iran	7.29	9.11	1.55	0.99	4.11	25%	-83%	-36%	315%
Iraq	-	-	-	-	-	n/a	n/a	n/a	n/a
Israel	4.12	4.55	0.83	0.40	2.67	10%	-82%	-52%	568%
Jordan	4.15	4.49	1.07	2.01	4.28	8%	-76%	88%	113%
Kuwait	8.51	0.15	0.09	1.61	-	-98%	-40%	1689%	n/a
Lebanon	1.96	1.94	0.41	-	-	-1%	-79%	n/a	n/a
Oman	2.30	2.50	0.62	0.46	2.88	9%	-75%	-26%	526%
Qatar	1.82	2.14	0.58	0.61	2.56	18%	-73%	5%	320%
Saudi Arabia	15.33	17.53	4.14	3.48	16.51	14%	-76%	-16%	374%
Palestine	-	-	-	-	-	n/a	n/a	n/a	n/a
Syria	1.80	2.42	0.48	0.66	1.79	34%	-80%	38%	171%
Turkey	45.77	51.19	15.89	29.93	50.45	12%	-69%	88%	69%
United Arab Emirates	20.21	21.56	7.17	11.48	22.65	7%	-67%	60%	97%
Yemen	-	-	-	-	-	n/a	n/a	n/a	n/a
Central Asia									
Kazakhstan	8.31	8.52	2.03	1.33	4.73	3%	-76%	-34%	256%
Kyrgyzstan	6.95	8.51	2.08	3.17	-	22%	-76%	52%	n/a
Tajikistan	1.04	1.26	0.35	0.30	-	21%	-72%	-14%	n/a
Turkmenistan	-	-	-	-	-	n/a	n/a	n/a	n/a
Uzbekistan	5.35	6.75	1.55	1.88	5.23	26%	-77%	21%	178%

Table 3. Tourism Arrivals in Asia

International Tourist Arrivals (in millions)						Tourist Arrivals Growth Rate (in percentage)			
Country	2018	2019	2020	2021	2022	2018-2019	2019-2020	2020-2021	2021-2022
East Asia									
China	62.90	65.70	7.97	5.66	-	4%	-88%	-29%	n/a
Hong Kong, China	29.26	23.75	1.36	0.09	0.57	-19%	-94%	-93%	533%
Macao, China	18.49	18.63	2.82	3.70	2.48	1%	-85%	31%	-33%
Japan	31.19	31.88	4.12	0.25	3.83	2%	-87%	-94%	1432%
North Korea	-	-	-	-	-	n/a	n/a	n/a	n/a
South Korea	15.35	17.50	2.52	0.97	3.20	14%	-86%	-62%	230%
Mongolia	0.53	0.58	0.06	0.03	0.29	9%	-90%	-50%	867%
Taiwan	11.07	11.86	1.38	0.14	0.90	7%	-88%	-90%	543%
South Asia									
Afghanistan	-	-	-	-	-	n/a	n/a	n/a	n/a
Bangladesh	0.27	0.32	-	-	-	19%	n/a	n/a	n/a
Bhutan	0.27	0.32	0.03	-	-	19%	-91%	n/a	n/a
India	17.42	17.91	6.34	7.01	-	3%	-65%	11%	n/a
Maldives	1.48	1.70	0.56	1.32	1.68	15%	-67%	136%	27%
Nepal	1.17	1.20	0.23	0.15	0.61	3%	-81%	-35%	307%
Pakistan	-	-	-	-	-	n/a	n/a	n/a	n/a
Sri Lanka	2.33	1.91	0.51	0.19	0.72	-18%	-73%	-63%	279%
Southeast Asia									
Brunei	0.28	0.33	0.06	-	-	18%	-82%	n/a	n/a
Cambodia	6.20	6.61	1.31	0.20	2.28	7%	-80%	-85%	1040%
Indonesia	15.81	16.11	4.05	1.56	5.47	2%	-75%	-61%	251%
Lao PDR	4.19	4.79	-	-	-	14%	n/a	n/a	n/a
Malaysia	25.83	26.10	4.33	0.13	10.07	1%	-83%	-97%	7646%
Myanmar	-	-	-	-	-	n/a	n/a	n/a	n/a
Philippines	7.17	8.26	1.48	0.16	2.65	15%	-82%	-89%	1556%
Singapore	18.51	19.12	2.74	0.33	6.31	3%	-86%	-88%	1812%
Thailand	38.18	39.87	6.70	0.43	11.15	4%	-83%	-94%	2493%
Vietnam	15.50	18.01	3.84	0.16	3.66	16%	-79%	-96%	2188%

Source: UNWTO Tourism Data Dashboard and Annual WITC Travel and Tourism Economic Impact Report

TOP SOURCE MARKETS

Intra-ASEAN travel is common within the ASEAN member states, where neighboring countries frequently host visitors from adjacent nations, as shown in Table 4. In the years before the pandemic, China was the dominant source market for all ASEAN countries. Even as it closed its borders to most inbound and outbound travel, China in 2022 continued to be the top source markets for most ASEAN countries, except the Philippines, Singapore, and Thailand.

Also, South Korea has solidified its position as one of the dominant source markets within the ASEAN region, with the exceptions of Indonesia, Malaysia, and Singapore, where South Korea's influence as a source market appears less pronounced.

Furthermore, upon comparing the top source markets of ASEAN countries between 2019 and 2022, a theme of stability emerges. Minimal shifts have been observed, signifying a continuity in the patterns of source markets.

Table 4. Top Source Markets

	2019	2022		2019	2022
Brunei	Malaysia	Malaysia	Myanmar	Thailand	Thailand
	China	China		China	China
	Indonesia	United Kingdom		Japan	South Korea
	Philippines	Australia		India	India
	South Korea	Singapore		South Korea	United States
Cambodia	China	China	Philippines	South Korea	South Korea
	Vietnam	Vietnam		China	United States
	Thailand	South Korea		United States	Australia
	Laos	Thailand		Japan	Japan
	South Korea	Laos		Taiwan	Canada
Indonesia	Malaysia	Malaysia	Singapore	China	Indonesia
	China	Singapore		Indonesia	India
	Singapore	Australia		India	Australia
	Australia	China		Australia	Malaysia
	India	India		Japan	Philippines
Laos	Thailand	Thailand	Thailand	China	Malaysia
	China	Vietnam		Malaysia	India
	Vietnam	China		India	Singapore
	South Korea	South Korea		South Korea	South Korea
	United States	United States		Laos	Laos
Malaysia	Singapore	Singapore	Vietnam	China	South Korea
	Indonesia	Indonesia		South Korea	China
	China	China		Japan	Laos
	Thailand	Thailand		Taiwan	Russia
	Brunei	Brunei		United States	United States

Source: UNWTO Tourism Data Dashboard and Annual WITC Travel and Tourism Economic Impact Report

ESSENTIALS :

ASEAN DRIVERS OF PERFORMANCE

INTRODUCTION

The Philippines, seen from the standpoint of its key economic and statistical indicators, has largely succeeded in growing its tourism industry over the period between 2009 to 2019. However, it is also in a region with many competitors that have similar and comparable tourism products and offer these to many of the same international markets. Crucially, while the Philippines has the fifth largest economy in Southeast Asia, it underperforms in competitive metrics against other Southeast Asian countries, ranking sixth in the 2019 World Economic Forum Travel and Tourism Competitiveness Index and the 2021 World Economic Forum Travel and Tourism Development Index. In this regard, the Philippines needs to evaluate and learn from its neighbors to strengthen its position and navigate a path toward a trajectory for growth anchored on Philippine identity, competitiveness, resilience, and sustainability, while enhancing connectivity, convenience, and equality for tourists and tourism communities.

MEASURING TOURISM PERFORMANCE

International Tourism Performance

TABLE 1. 2019 TOURISM PERFORMANCE FOR THE SOUTHEAST ASIAN REGION

	International Visitor Arrivals (M)	Growth Rate	International Tourism Receipts (USD M)	Growth Rate	Receipts per Arrival (USD)	Domestic Tourist Trips (M)	Growth Rate
PHILIPPINES	8.26	15.2%	11,455	17.9%	1,386.80	122.12	11.3%
BRUNEI	4.45	-1.6%	217	14.2%	48.76	-	-
CAMBODIA	6.61	6.6%	5,312	9.9%	803.63	11.32	2.3%
INDONESIA	16.11	1.9%	18,405	2.7%	1,142.46	722.16	138%
LAOS	4.79	14.4%	974	16.9%	203.34	2.35	-16.6%
MALAYSIA	35.05	10.4%*	22,200	2%	633.38	332.38	9.9%
MYANMAR	4.36	22.9%	2,501	49.8%	573.62	-	-
SINGAPORE	19.12	3.3%	20,313	0%	1,062.40	-	-
THAILAND	39.92	4.6%	64,371	4.9%	1,612.50	229.75	8.7%
VIETNAM	18.01	16.2%	11,830	17.4%	656.86	85	6.25%

Source: UNWTO Statistical Database

*Malaysia's growth rate only refers to the growth of overnight visitors and excludes same-day visitors. Malaysia did not report total international visitor arrivals for 2018.

Tourism performance is conventionally compared between countries in terms of international visitor arrivals and international tourism receipts. While we discuss these metrics below, these have significant limitations. They do not, for example, reflect the value of domestic tourism, the impact of visitors on the environment, cultural sites, and community infrastructure and services, or whether tourism genuinely



provides social and economic benefits and opportunities to residents and businesses. They also do not reflect inherent challenges created by geography or opportunities from historical and cultural ties. We nevertheless discuss the traditional and other metrics to provide a greater understanding of the Southeast Asian competitive environment.

International Visitor Arrivals. In 2019, Thailand led in the region's international visitor arrivals with 39.92 million, followed by Malaysia with 35.05 million. The Philippines ranked fifth in the region with its 8.26 million visitors. Five out of the ten ASEAN Member States posted double-digit growth rates in 2019, with Myanmar posting a 22.9% growth rate, a recovery close to its 2015 high of 4.68 million arrivals, with the arrivals being depressed in the intervening period by political instability. In terms of growth rates, the Philippines ranked third with 15.2%.

As a general pattern driving these increases over several decades, international arrivals have been facilitated by enhanced connectivity (both intra-regional and with the rest of the world) particularly by air travel, the easing of border crossings within ASEAN, visa facilitation initiatives (i.e., e-visa applications, visas upon arrival, charter flights, liberalized regional air agreements), increases in discretionary incomes, greater awareness through promotions campaigns and facilitated by the internet and social media, and a geopolitical and economic climate that encouraged increased openness and mobility.

Many Southeast Asian countries, particularly those on the western side of the region, benefited particularly from the stabilization and opening of their neighbors, and the facilitation of land and ferry border crossings for ASEAN residents.

International tourism arrivals could rapidly increase, depending on the strength of promotions campaigns in source markets, and the ease of travel from source markets to the destination – the cost and comfort of transportation, including having as few transfers as possible, and whether visas are required or not.

International Tourism Receipts. In terms of tourism earnings, Thailand ranks first in Southeast Asia (USD 64.37 billion), followed by Malaysia (USD 22.2 billion). The Philippines ranked fifth in the region with USD 11.455 billion. It ranked second, however, with a growth rate of 17.9%, following only Myanmar which, as noted earlier, was recovering from depressed arrivals from political instability in a prior period.

The value of international receipts is influenced by the three metrics: volume of travelers, average length of stay, and average daily spending. In the past, high volumes of arrivals were key in generating tourism receipts in both Thailand and Malaysia. However, in recent years, Thailand has shown increases in the average length of stay of its visitors. In Singapore, its high levels of tourist spending are due in part to the high cost of goods and services in the city-state. In the Philippines, on the other hand, receipts are driven largely by a relatively higher average length of stay when compared to its neighbors. A comparison of receipts per traveler ranks the Philippines in second place with USD 1,386.80 after Thailand's USD 1,612.50. A deeper examination of other ASEAN countries would show much lower yields per visitor because of a significant proportion of same-day/cross-border visitors (discussed further below).

An analysis of receipts per visitor is thus more indicative of the economic impact of international tourism than total arrivals or total receipts. Improving tourism receipts while managing the numbers of tourists (and their impact on the local environment, sites, communities, services, and infrastructure) and the cost competitiveness of our offerings may be attained by encouraging longer stays and greater spending by deepening and diversifying product offerings.

Domestic Tourism

Of the seven regional members that reported to the UNWTO their domestic tourism trips in 2019, Indonesia leads with 722 million trips, followed by Malaysia with 332 million trips. The Philippines ranks fourth with 122 million trips. Indonesia's massive numbers reflect not only its large population (270.6 million in 2019) but also a sudden increase of 138% from 2018 (and a 168% increase from an average of 269 million trips in the previous five-year period) perhaps indicative of changes in its data gathering and analysis methodologies for domestic tourism.

Looking however at Philippine Statistical Authority data provides greater nuance to the significance of domestic tourism. In 2019, while international tourism generated a significant PHP 600 billion (and ranked as our third largest source of foreign revenue), this is dwarfed by the value of domestic tourism at PHP 3.14 trillion. Domestic tourism accounts for 84% of the country's tourism economy.

Domestic trips are driven not only by the size of the domestic population, but also the relative affluence, a cultural predisposition to travel, and the ease of travel across the country. In this regard, population and income growth rates, and the cost of travel, are key factors that set the limits to the growth of domestic tourism. Domestic tourists can also often stay within a geographical region for quick weekend trips, saving longer travels for key holidays and vacation leave. Increasing domestic tourism can be supported by promoting destinations and attractions within the local region, institutionalizing long weekends, and facilitating more and cheaper connections by sea and air between distant regions within the country.

Going Deeper with the World Travel and Tourism Council

The World Travel and Tourism Council (WTTC) goes further beyond these direct impact metrics by examining the indirect and induced impacts of tourism of both domestic and international tourism. In its methodology report,¹ it discusses the "direct contribution" of travel and tourism as consisting of spending by residents and non-residents, government spending directly linked to visitors, the output of tourism sectors, and the net value of imported and domestic purchases by tourism enterprises. "Indirect contribution" includes investment spending, government spending that supports tourism, and domestic supply chains. "Induced contribution" includes spending by those directly or indirectly employed by the tourism sector.

The most significant difference between the WTTC's approach and that of our statistical authorities is the inclusion of the induced contribution of tourism. Table 2 below captures the total contribution of travel and tourism to each Southeast Asian economy.

¹ WTTC/Oxford Economics 2021. Travel and Tourism Economic Impact Research (Methodology) May 2021.



TABLE 2. WTTC ECONOMIC IMPACT OF TOURISM IN ASEAN: 2019

Member State	GDP Contribution		Employment		Visitor Impact		Spending by Purpose			
	Value (USD B)	Share to GDP (%)	Persons (M)	Share (%) to Employment	International (USD B)	Share to Exports (%)	International (USD B)	Domestic (USD B)	Leisure (USD B)	Business (USD B)
Brunei	0.7	5.6	0.01	7.3	0.23	3.1	0.22	0.28	0.457	0.052
Cambodia	6.97	25.9	2.23	24.7	5.4	32.1	5.3	1.58	4.273	2.677
Indonesia	64.7	5.9	13.18	10.1	17.9	8.9	18.4	21.6	30.1	9.4
Lao PDR	1.9	10.0	0.35	10.2	0.98	13.6	0.97	0.51	1.223	0.264
Malaysia	41.8	11.7	2.28	15.1	21.4	9.2	22.2	21.8	37.5	5.7
Myanmar	5.50	5.9	1.41	6.3	2.8	16.9	2.5	1.50	2.450	1.892
Philippines	90.0 2nd	22.5 2nd	9.57 2nd	22.8 2nd	12.1 5th	10.8 5th	11.5 6th	64.4 1st	50.6 2nd	26.0 1st
Singapore	39.2	11.1	0.54	14.3	26.0	4.2	27.7	10.4	19.4	16.9
Thailand	106.5	20.1	8.05	21.4	63.2	20	65.1	27.3	80.9	9.6
Vietnam	23.2	7.0	4.91	9.0	11.1	4.0	11.8	10.40	19.536	2.012
ASEAN	380.7	11.8	42.60	13.4	161.1	8.9	165.7	159.8	246.4	74.5

Note: Nominal values; CAGR = Compounded Annual Growth Rate

Source: WTTC Report 2021 Estimates. The top performer for each indicator is in black text, Philippine performance and rank are highlighted.

The WTTC Report provides much greater nuance in describing the Philippine tourism industry’s performance and contribution to national development. While the country may rank sixth in the region under the traditional metric of international arrivals, it ranks second in the region on many other metrics – such as the industry’s value to the economy and employment, and to spending for leisure – and first in the value of its domestic tourism and on business spending.

The WTTC report echoes the Philippine Statistical Authority’s data on the massive size of Philippine domestic tourism but also indicates that tourism spending travels farther and deeper within the country, likely through deeper domestic supply chains and the spending of employees.

An inordinate focus on the metric of international arrivals, by itself, undervalues the significance of economic impact of travelers, and of the role of domestic tourism. This is not to devalue international tourism – as a major source of foreign revenue, international tourism helps in stabilizing the economy and strengthens our position for foreign trade. It also offers an opportunity for growth and investment that is not otherwise constrained by domestic economic conditions.

However, together with increasing international arrivals, strategies must also support product diversification, the deepening of value chains, and encouraging domestic travel, especially within the context of promoting industry resilience and spreading economic opportunities throughout the country. What is necessary, therefore, is a balanced and flexible approach toward nurturing both domestic and international travel within and into our country.

THE REGIONAL LEADERS

This part of the briefing compares the Philippines with regional leaders, namely, Thailand, Malaysia, Singapore, Vietnam, and Indonesia to provide a greater understanding of different drivers affecting the performance of each.

Profile of International Arrivals

The table below provides greater context to the kind of international arrivals received by each of the selected Southeast Asian states.

	THAILAND	MALAYSIA	SINGAPORE	VIETNAM	INDONESIA	PHILIPPINES
Total International Tourist Arrivals	39.92	35.05	19.11	18	16.11	8.26
Overnight Tourist Arrivals (in millions)	39.92	26.1	15.11		15.46	8.26
Same-day arrivals (in millions)		8.94	4		0.65	
ASEAN as % of total arrivals	26.94	68.5	34.65	11.31	38.23	6.38
Top Markets as % of total arrivals	China (27.5)	Singapore (38.9)	China (18.9)	China (32.2)	Malaysia (18.5)	Korea (24.1)
	Malaysia (10.4)	Indonesia (13.9)	Indonesia (16.3)	Korea (23.9)	China (12.86)	China (21.1)
	India (4.99)	China (11.9)	India (7.3)	Japan (5.3)	Singapore (12)	USA (12.9)
	Korea (4.72)	Thailand (7.2)	Malaysia (6.3)	Taiwan (5.2)	Australia (8.6)	Japan (8.3)
	Laos (4.7)	Brunei (4.7)	Australia (6)	USA (4.1)	East Timor (7.3)	Taiwan (4.0)

From the UNWTO Tourism Statistics Database, World Bank Open Data, or NTO reports.

Bold text in "Top Markets" indicates an immediate/proximate neighbor of each state.

For many of our neighbors, the ASEAN market is a sizable one. Fellow Southeast Asian countries comprise more than 2/3 of total arrivals in the case of Malaysia, over 1/3 for both Singapore and Indonesia, and over 1/4 for Thailand. Vietnam and the Philippines, however, respectively only received 11.31% and 6.38% of their arrivals in 2019 from Southeast Asia.

Whether within ASEAN or just immediately outside the region, the proximity is key – in each of the countries' top five markets, a sizable number of arrivals are facilitated by shared land borders, bridges, and short ferry crossings and, in many cases, with direct connections between key urban areas. Four of Malaysia's top source markets are its immediate and proximate neighbors, while Indonesia has three, and Singapore and Thailand have two each. For the Philippines and Vietnam, however, each has only one.



For markets from further afield, the economic and demographic weight of China can be felt across the region, placing it within the top three markets of all countries. Korea, India, Japan, Taiwan, Australia, and the United States are among the top five markets of two or three countries in the ASEAN region, while Vietnam and the Philippines have identical markets – just in different proportions.

Also, Malaysia and Singapore both have a significant fraction of their visitors as being “same-day arrivals.” These reflect transiting passengers spending their layovers outside the airport, as well as the quick cross-border travelers, especially across land borders or sea borders traversed by bridges or short ferry crossings. Both countries have positioned themselves as global transportation hubs and have encouraged visitors to take advantage of layovers. Singapore’s position as the region’s financial capital has spurred development in neighboring areas in Malaysia and Indonesia, with a significant number of visitors regularly crossing the border.

This discussion thus highlights the significance of geography in generating arrivals numbers. The Philippines, located on the western and archipelagic side of Southeast Asia, is at a disadvantage. This prompts the development of strategies that deemphasize numbers by themselves, and focus on (1) longer-staying and higher-value travelers, (2) facilitating greater and improved air connections with regional hubs, and with existing and new markets, (3) linking cruising and sea travel connections throughout East and Southeast Asia.

Also, the countries in the region are generally competing for the same markets, with the economic weight of China (and to a much lesser extent, that of India, Japan, and Korea) being keenly felt. The Philippines also has yet to build or capitalize on its deep cultural ties with Central and South America, with Europe and the Anglosphere, or other countries with which we have developed or are developing strong political relationships. Similarly, the value of the 10 million-strong Filipino diaspora has yet to be fully leveraged for tourism, and previous programs in this regard need to be evaluated and redesigned.

Key Destinations and Top Attractions

Throughout Southeast Asia, metropolitan areas naturally function as destinations in themselves, often having the main airport gateways, as well as cultural, natural, and historical landmarks, conventions and business facilities, hotels and restaurants, shopping and leisure districts, cultural centers, and amusement parks, among others. Also, each country tends to have one or two key leisure tourism destinations, often primarily a beach island, occasionally with a rich mix of its own cultural, natural, and built attractions. The table below summarizes each country’s key destinations and attractions.

TABLE 4. TOURISM PERFORMANCE OF SELECT ASEAN COUNTRIES (2019)

	Thailand	Malaysia	Singapore	Vietnam	Indonesia	Philippines
Key Destinations:	Bangkok	Kuala Lumpur		Ho Chi Minh	Bali	Cebu
Share of Total International Arrivals (2019)	64%	54%		45.6%	53.2%	33.22%
(Totals may exceed 100% as travelers will often visit more than one destination)	Phuket	Johor Bahru		Ha Long	Jakarta	Manila
	27%	27%		34.7%	29.2%	20.7%
	Pattaya	Penang		Hanoi	Batam	Boracay
	25%	14%		28.5%	17.7%	12.6%
Key Destinations:	Wat Phra	Petronas (1),	Gardens by	Old Quarter	Waterbom	White Beach
Trip Advisor Attractions Travelers' Favorites	Chetupon (1),	Escape	the Bay,	(3), War	Park (1),	(3),
(updated Feb 2023)	Chiang Mai	Penang (3),	Botanic	Remnants	Sacred	Underground
name of country>things to do>top attractions>	Elephant	KLCC Park (1),	Gardens,	Museum (1),	Monkey	River,
(Numbers in parentheses correspond to the location of the attraction in the first, second, or third top destination of the country)	Rescue,	Legoland (2),	Orchid	Cu Chi Tunnels	Sanctuary (1),	Kayangan
	Sanctuary of	Langkawi	Garden, Zoo,	(1), Hoi An	Tegalang Rice	Lake,
	Truth (3),	Skycab,	Cloud Forest,	Ancient Town,	Terraces (1),	Intramuros (2),
	Chiang Mai	Batu Caves,	Marina Bay,	Halong Bay	Tanah Lot	Nacpan Beach,
	Wat Chedi, Soi	Peranakan	Sands	(2), Lake of the	Museum (1),	Yapak Beach
	Dog (2), Bang	Mansion (3),	Skypark, Mass	Restored	Uluwatu	(3), Banaue
	Tao Beach (2),	KL Bird Park	Rapid Transit,	Sword (3),	Temple (1),	Rice Terraces,
	Freedom	(1), Pavilion KL	Flyer,	Da Nang	Bali Zoo (1),	Basilica del
	Beach (2),	(1), Menara KL	Supertree	Marble	Prambanan	Santo Nino (1),
	Krabi Bamboo	(1), Jalan Alor	Grove	Mountains,	Temples,	Big Lagoon,
	Island, Koh	(KL)		Hue Imperial	Borobodur	Fort Santiago
	Samui Lamai			City, Temple of	Temple,	(2)
	Beach			Literature and	Campuhan	
				National	Ridge Walk	
				University (3),	(1), Ijen Crater	
				Central Post		
				Office (1)		

Comparing key destinations of each country, key destinations may be grouped as follows: first, the capital gateways, with Bangkok and Kuala Lumpur, reflected in terms of their shares of total international tourist arrivals. Bangkok receives 64% of the total international tourist arrivals of Thailand while Kuala Lumpur receives 54% of Malaysia’s. Second, the Philippines and Vietnam reflect dual metropolitan destinations, with Ho Chi Minh and Hanoi, and Manila and Cebu. Third, Indonesia and Malaysia, with Batam and Johor respectively, provide space for investment, manufacturing, housing, and leisure, supporting Singapore’s role as the region’s business and financial hub. Last, each country, except for Singapore, has one or two distinct leisure tourism islands – Thailand has Pattaya and Phuket, Malaysia has Penang, Vietnam has Ha Long, Indonesia has Bali, and the Philippines has Boracay. These tourism islands account for a range from Boracay’s 12.6% of international arrivals to Bali’s 53.2%.

Referring to Trip Advisor’s “Travelers’ Favorites”, we see how the variety of attractions might indicate how destinations are perceived. In many cases, capital cities benefit from historical and cultural landmarks, such as temples, historic city districts, leisure complexes, and amusement parks. On the



other hand, some tourist islands benefit not only from their beaches but also have cultural assets and developed other leisure attractions.

The mix of attractions is also indicative of each country's approach to tourism development – Indonesia is still heavily focused on Bali and many of Malaysia's are focused on Kuala Lumpur, and to a lesser extent, Penang. The lack of tourist attractions for Batam and Johor Bahru for these two countries, despite their sizable arrivals, is indicative of their nature as industrial and commercial zone developments that are adjoining to, and support, Singapore.

In the Philippine case, the majority of attractions refer to beaches in Boracay and Palawan, and while Boracay ranks third in terms of arrivals, Palawan is leaving a mark and a trajectory for growth. The inclusion of the Underground River and Banaue Rice Terraces is indicative of the potential of UNESCO listings for tourism. Manila benefits from Intramuros and Fort Santiago but underperforms as a capital city, perhaps plagued by its reputation for traffic, poor security, and a messy airport. This can indicate an opportunity for growth if these structural problems are resolved. On the other hand, while Cebu readily leads with one-third of the Philippines' international arrivals, its only identified attraction is Basilica del Santo Nino, indicating an opportunity for investing in and highlighting more of its natural and cultural assets, as well as developing more built attractions. The potential of other destinations in the country has yet to be reflected in this scheme.

Policy Growth Drivers

In this section, we summarize the policies that have driven the tourism growth of our neighbors over the last three to five decades. These policies may be summarized by three themes: Accessibility, Affinity, and Administration.

Accessibility. Improving accessibility must be holistic to improve the traveler experience. Leading ASEAN destinations have invested over decades in their gateway and key destination airports and seaports, and in supporting air and sea transport in the development of direct routes with key markets.

Successful accessibility strategies involve coordinated efforts in increasing the capacity of airport and seaport hubs, meeting international operations/safety standards, the aggressive role of airlines and cruise lines in promotions and route development, and improving the connections from these airports and seaports with public transport modes.

Reducing the barriers to and friction in travel – the need to change planes, airlines, or modes of transportation, securing visas, clearing customs, immigration and quarantine, and navigating airports/seaports, among many others – are crucial elements for accessibility.

Affinity. In generating affinities between markets and destinations, the top ASEAN destinations seized the opportunities created in the 1990s by the stabilization and opening of neighboring ASEAN countries that had been closed or locked in civil war, and the facilitation of intra-ASEAN travel in the 2000s. As mentioned earlier, ASEAN nations, especially those on the Southeast Asian mainland, benefit significantly from travel with their immediate neighbors, whether for business and trade or leisure and recreation.

Also within this period, there was the liberalization of global trade and travel, the rise of technological innovation in making transportation and accommodations cheaper and more efficient, and the rising prosperity of outbound near-abroad markets: first from Japan, then Korea, and now from China.

Successful affinity strategies involved capitalizing on historic opportunities through policies that linked and coordinated between the markets and destinations, and the public and private sectors, and turning these opportunities into long-term and sustainable markets.

Developing further the theme of Affinity and focusing particularly on branding and promotions, a successful strategy appears to have six key elements: (1) Continuity or evolution of the tourism brand, (2) stakeholder ownership, (3) communicating an experience, (4) inclusive of the whole country, (5) compatible with the national development brand, and (6) a commitment of resources.

While the long-running brands of Malaysia and Thailand are well known, Vietnam, even amid its rapid surge in arrivals in the last decade, has nevertheless refreshed its branding but within the general theme. It is thus not necessarily the case that a brand needs to be maintained in all cases, instead a proper assessment of what works and what doesn't is needed. What appears indispensable would be the role of stakeholders in developing, assessing, and implementing the promotions strategy. In other countries, the tourism promotions board involves the private sector, allowing for their input in the development process, and consistency and the leveraging of resources in implementation throughout the visitor journey. Even in the Philippine experience, the more successful brands have been those that allowed stakeholders to buy into the brand. That ownership of the brand has been reflected in how widely was adapted to various destinations, attractions, and products. In that regard, focusing on a feeling, concept, or experience rather than specific products, attractions, or destinations ensures that the brand can be used for all the tourism assets across the entirety of the country, thus allowing different localities to use the brand in their own promotions efforts as well. The tourism promotions strategy can benefit significantly when it also ties into the broader vision for national growth and investment, maximizing exposure and the mileage from limited resources by conveying a consistent message. Finally, the regional leaders have, in various funds, allocated over USD 100 million annually over the last two decades just for tourism promotions, in recognition of the high returns on investment when comparing promotions spending against the overall economic impact of tourism.

Administration. The beginning and continuing success of leading destinations can also be attributed to the inclusion and prioritization of tourism in the national agenda. National prioritization of tourism includes long-term targeted and coordinated investment and development of new and existing tourism destinations, gradual diversification of products, upgrading of services and facilities, and destination placemaking among others.

Many of the ASEAN leaders have invested heavily in the planning and development of their tourism islands or resort districts as special economic zones and tourism estates in the 1980s and 1990s, and are now investing in the planning, investment, and development of new destinations. Malaysia in particular has been promoting increased investment, through incentives, in tourism projects in its other states. Singapore continues to provide incentives for investments in new attractions.

Others have made dedicated efforts to secure international recognition for their natural and cultural attractions – Vietnam in particular since 2008 has secured 14 UNESCO designations for natural, cultural,



and intangible heritage. The long-term, national-level prioritization and coordination, therefore, of destination planning and research, investment promotions, infrastructure development, attractions and facilities development, country and destination-level promotions, and local capacity skills development, among many others, are crucial in the successes of many of the ASEAN leaders.

ESSENTIALS : TOURISM AND THE UN SUSTAINABLE DEVELOPMENT GOALS

The current framework for sustainability is that of the United Nations (UN) 17 Sustainable Development Goals (SDGs). As observed in the joint 2018 publication of the UN World Tourism Organization (UNWTO) and the UN Development Program (UNDP) *Tourism and the Sustainable Development Goals – Journey to 2030*:

As one of the fastest-growing economic sectors in the world, tourism is increasingly recognized as a vital contributor to job and wealth creation, economic growth, environmental protection, and poverty alleviation. Indeed, well-designed and managed tourism can help preserve the natural and cultural heritage assets upon which it depends, empower host communities, generate trade opportunities, and foster peace and cultural understanding.

Tourism can be an effective tool for promoting and enhancing sustainable development. It can reach remote communities that would otherwise have little by way of economic opportunity, and if managed properly can provide an incentive for the conservation of natural and cultural assets.

Distilling from many various sources and our own experiences, some of the strategies that tourism should adopt to facilitate attaining the SDGs would include the following:

Sustainable Development Goals		Tourism Strategies
1	End poverty in all its forms everywhere	Generate employment and economic opportunities in tourism communities
2	End hunger, achieve food security and nutrition, promote sustainable agriculture	Promote and support local agricultural production and integrate agricultural practices into the tourism experience
3	Ensure healthy lives and promote well-being for all at all ages	Promote active lifestyles by experiencing the natural, rural, and urban outdoors, as well as traditional, conventional, and adventure sports
4	Ensure inclusive and equitable quality education and promote lifelong learning for all	Create venues for the continuous training of personnel, and for the education of the broader public on environment, culture, and sustainability, as well as incorporate educational experiences in tourism
5	Achieve gender equality and empower all women and girls	Ensure equal work for equal pay regardless of sex or orientation, eliminate the exploitation of women and girls in tourism enterprises and activities, and provide education and training
6	Ensure the availability and sustainable management of water and sanitation for all	Ensure that the consumption of tourists is considered in planning water and sanitation infrastructure and adopt conservation strategies, especially in sensitive environments
7	Ensure access to affordable, reliable, sustainable, and modern energy for all	Ensure that the consumption of tourists is considered in planning energy infrastructure and supporting the transition to renewables, especially in sensitive environments



8	Promote sustained, inclusive, and sustainable economic growth, employment, and decent work for all	Involve the local community in decision-making for sustainable employment, investment, and development, and provide incentives for development in remote or underdeveloped communities
9	Build resilient infrastructure, promote inclusive and sustainable industrialization, and foster innovation	Support the use of both grid and off-grid utilities to promote resilience, as well as multi-use or integrated tourism infrastructure, and prepare for crises and disasters
10	Reduce inequality within and among countries	Generate awareness of the developmental gaps between communities and countries, and utilize the economic, cultural, and social benefits of tourism to reduce such gaps
11	Make cities and human settlements inclusive, safe, resilient, and sustainable	Involve communities in the management of tourism, ensuring their stakeholderhood and participation in a successful tourism program
12	Ensure sustainable consumption and production patterns	Encourage the use of local goods and products, support local producers and traditional practices of sustainability
13	Take urgent action to combat climate change and its impacts	Adopt programs that reduce and offset emissions, such as the use of renewable energy, a shift to electric transportation platforms, and adopting sustainable agricultural and industrial practices, as well as promote environmental management programs at the local level
14	Conserve and sustainably use the oceans, seas, and marine resources for sustainable development	Manage the interactions of tourists in marine environments, eliminate the discharge of waste into the ocean, and utilize tourism to finance the conservation of the marine environment
15	Protect, restore, and promote sustainable use of terrestrial ecosystems and halt biodiversity loss	Manage the interactions of tourists in terrestrial environments, eliminate the discharge of waste into the biodiverse environments, and utilize tourism to finance the conservation of forests, other terrestrial ecosystems, and biodiversity
16	Promote peaceful and inclusive societies, provide access to justice for all, and build inclusive institutions	Ensure that local and national governments develop inclusive programs to benefit from tourism development, particularly in areas and communities often neglected by mainstream development
17	Strengthen the means of implementation and revitalize the global partnership for sustainable development	Work with international institutions, and non-governmental organizations to promote sustainable tourism development at a global level

ESSENTIALS :

SUSTAINABLE TOURISM RESOURCES

Resource Name	Resource Type	Description of Resource	Link Source
Pacific Asia Travel Association (PATA) Tourism Destination Resilience (TDR) Programme	Online Module, Risk Exposure Tool, Resilience Assessment Tool, Resource Library, and Capacity Building	The PATA TDR Programme was developed as a guide for tourism destinations to build resilience and increase their adaptive capacity. The five tools of the programme cover three main topics namely: risk assessment, risk management, and adaptive capacity.	https://crc.pata.org/tourism-destination-resilience/
United Nations (UN) Sustainable Development Goals (SDG)	Framework and Targets	The current framework for sustainability is that of the UN 17 SDGs. These goals outline the targets for achieving the balance of social, economic, and environmental sustainability.	https://sdgs.un.org/goals
World Economic Forum (WEF) Travel & Tourism Development Index (TTDI)	Framework, Index, and Report	The WEF TTDI is comprised of five subindices, 17 pillars, and 112 individual indicators that serve as a strategic benchmarking tool for the development of the Travel and tourism sector.	https://www3.weforum.org/docs/WEF_Travel_Tourism_Development_2021.pdf
Department of Environment and Natural Resources (DENR) Guidebook to Protected Areas of the Philippines	Report	This report highlights the ecotourism sector in the Philippines and aims to bring attention to these sites that are endowed with extreme beauty, and rich natural and cultural history. The report started with 16 sites (and will eventually cover all PAs in the Philippines) discussing the ecotourism potential of these sites.	https://www.denr.gov.ph/images/DENR_Publications/PA_Guidebook_Complete.pdf
DENR Manual on Computing Carrying Capacity of Ecotourism Sites in Protected Areas	Guidebook, Tools, and Report	This report provides a guideline for ecotourism destinations in solving the carrying capacity (i.e., the allowable number of visitors and tourists) of the tourism sites. The report also provides sample carrying capacity computations for various ecotourism sites in the Philippines.	https://erdb.denr.gov.ph/wp-content/uploads/2015/06/CARCAP_Manual_LAC.pdf
Department of Tourism (DOT) Tourism Guidebook	Guidebook, Tools, and Report	The Tourism Guidebook has been developed to guide the local government units in administering and monitoring their tourism activities and enforcing tourism laws, rules, and regulations in their respective jurisdiction. The guidebook contains two major parts: the guide in the formulation of local tourism development plan (LTDP) and supplemental readings.	http://www.tourism.gov.ph/Guidebook_Manual/TourismGuidebook.pdf
United Nations World Tourism Organization (UNWTO) Sustainable Tourism for Development Guidebook	Guidebook and Report	This report highlights the importance of sustainable tourism towards achieving social, economic, and environmental sustainability. It also discusses the role of government, the private sector, civil society, and other stakeholders in promoting sustainable tourism. The report also highlights the importance of monitoring and evaluation initiatives to ensure that the benefits of sustainable tourism are being carried out.	https://www.e-unwto.org/doi/pdf/10.18111/9789284415496
United Nations Environment Programme (UNEP) Climate Change Adaptation and	Framework, Tools, and Report	This report discusses the potential impacts of climate change on the tourism industry and recommends strategies for adaptation and mitigation. The report also highlights that tourism is both a contributor to and a victim of climate change. It also discusses case studies showing the issues and	https://wedocs.unep.org/bitstream/handle/20.500.11822/9681/Climate_Change_adaptation_mitigation.pdf?sequence=3&isAllowed=y



Resource Name	Resource Type	Description of Resource	Link Source
Mitigation in the Tourism Sector		best practices of tourism destinations regarding climate change adaptation and mitigation.	
World Bank (WB) Resilient Tourism: Competitiveness in the Face of Disasters	Framework and Report	This report emphasizes the importance of resilience in maintaining the competitiveness of the tourism industry. It highlights the severe and long-lasting impacts of disasters, both natural and man-made, on tourism. The report proposes a framework for improving resiliency in the tourism industry and is summarized into four components: risk identification and assessment, risk reduction and management, preparedness and response, and recovery and rebuilding. Lastly, the report also discusses some examples of best practices and highlights the importance of collaboration among tourism stakeholders in building resilience.	https://documents1.worldbank.org/curated/en/328421604042124972/pdf/Resilient-Tourism-Competitiveness-in-the-Face-of-Disasters.pdf
UNEP and UNWTO Making Tourism More Sustainable: A Guide for Policy Makers	Guidebook and Report	This report aims to provide policymakers with a comprehensive guide to developing and implementing sustainable tourism practices that can contribute to economic growth while minimizing negative environmental and social impacts.	https://wedocs.unep.org/bitstream/handle/20.500.11822/8741/-Making%20Tourism%20More%20Sustainable_%20A%20Guide%20for%20Policy%20Makers-2005445.pdf?sequence=3&isAllowed=y
Green Destination Standard	Framework and Tool	The Green Destination Standard is a globally recognized standard for sustainable tourism that can help local government units (LGUs) evaluate the sustainability of their destination. This standard covers various aspects of sustainable tourism, including destination management, nature conservation, cultural heritage preservation, and social well-being. The standard is based on a set of criteria and indicators covering five themes: destination management, nature and scenery, environment and climate, culture and tradition, and social well-being.	https://www.greendestinations.org/wp-content/uploads/2022/11/GD-Standard-V2-2021-GSTC-Recognised.pdf
World Travel and Tourism Council (WTTC) Nature Positive Travel & Tourism	Tool and Report	The report emphasizes the need for the tourism industry to take a more sustainable approach to travel and tourism through the integration of nature-positive principles and practices. The report provides a framework that lists the tourism industry's key impacts, dependencies, challenges, actions, and opportunities, integration with nature-positive tourism, and effective reporting. It also provides tools that allow the local government units to prioritize impacts, integrate nature-positive tourism concepts, and effectively report and monitor the indicators of their tourism destinations.	https://wtcc.org/Portals/0/Documents/Reports/2022/Nature-Positive-Travel-And-Tourism.pdf
WTTC Net Zero Roadmap for Travel & Tourism	Report	This report outlines a plan for the tourism industry to reach net zero emissions by 2050. The report emphasizes the immediate need to reduce carbon emissions and mitigate the effects of climate change. The roadmap includes several key recommendations, including transitioning to renewable energy, improving energy efficiency, reducing emissions from transportation, and investing in sustainable infrastructure.	https://wtcc.org/Portals/0/Documents/Reports/2021/WTTC_Net_Zero_Roadmap.pdf

ESSENTIALS : DETAILED PROGRAM BUDGETS

SUMMARY OF PROGRAM BUDGET REQUIREMENTS								
PROGRAMS AND PROJECTS	Remarks	TOTAL 2023-2028	Indicative Budget in PHP Million					
			2023	2024	2025	2026	2027	2028
PROGRAM 1. INSTITUTIONAL DEVELOPMENT								
Project 1.1 Institutionalizing mechanisms for convergence		156.73	16.80	25.32	26.59	27.92	29	31
Project 1.2 Establishing the mechanisms to advocate for the prioritization of tourism in the national agenda and to facilitate the operationalization of working groups in the Tourism Coordination Council.		49.74	3.50	7.00	7.70	8.47	12.82	10.25
Project 1.3. Improving and Institutionalizing Systems for Data Gathering, Reporting, Monitoring, and Evaluation to more effectively support data-driven decision-making for policy and management, particularly in the accomplishment of NTDP goals, including the development of the necessary integrated data infrastructure.		418	68	112	82	52	52	52
Project 1.4. Rationalizing and Streamlining Functions. Clarifying the mandates and functions of the DOT and attached agencies to eliminate redundancies, improve efficiencies, and provide the necessary resources to carry them out.		47.50	12.50	35.00	-	-	-	-
Project 1.5. Integrating Regulation and Stakeholdership. By expanding the scope of the accreditation system, more tourism enterprises can both be monitored and supported to meet accreditation standards such as a) Environmental/health/safety management standards; b) Training and compliance with social development goals; c) Reporting on visitor data and compliance with various programs; d) Certification programs on sustainability and resilience		161.87	2.00	19.20	31.00	33.60	36.46	39.61
Project 1.6. Local Tourism Offices. Institutionalizing the tourism offices of local government units to ensure continuity in capacities, programs, and development.		591.43	46.70	178.00	171.04	58.61	41.22	95.86
Project 1.7. Mainstreaming Resources for Sustainability and Resilience. Providing new and aligning existing funding sources to develop and support sustainability and resilience programs for tourism destinations.		167.00	10.00	30.50	20.00	25.00	39.50	42.00
Project 1.8. Optimize public and private partnerships as strategies for sustainable management and operation of tourism in tourism enterprise zones, protected areas, and heritage sites.		30.00	5.00	5.00	5.00	5.00	5.00	5.00



Project 1.9 Adopt inclusion of other non-governmental organizations, and academe in consultative processes	Integrated with Project 1.3	-	-	-	-	-	-	-
Project 1.10 Reform the travel tax and provide national and local funding sources for promotions, resilience, sustainability, and development	Integrated in Project 1.4.2	-	-	-	-	-	-	-
Project 1.11 Enhance the role of foreign offices and travel attaches toward market research and developing new markets within an integrated and coordinated framework with the central office		100.25	0.25	20.00	20.00	20.00	20.00	20.00
Project 1.12 Strengthen evidence-based decision-making, internal governance, and public accountability	Integrated with other Projects	-	-	-	-	-	-	-
Project 1.13. Continuing and Implementing the TourIST Destination Framework.		0.20	0.20	-	-	-	-	-
Project 1.14. Enhancing the Ecotourism Framework. Explore and develop tools for development and conservation, providing a framework for enhancing the tourism value of protected areas between DOT, DENR, and TIEZA.		8.73	-	4.24	-	4.49	-	-
Project 1.15. Developing a Cultural Heritage Tourism Framework. Providing and implementing a framework to properly coordinate the conservation and use of tourism's tangible and intangible heritage, enhancing and communicating significance, between DOT, NCCA, and other cultural agencies.		12.85	0.35	2.50	2.50	2.50	2.50	2.50
Project 1.16. An Enhanced, Harmonized, and Standardized Process for Tourism Planning that identifies components implementing the Strategic Values and Approaches, also to the 10A Framework, as well as mechanisms to enhance collaboration across clustered LGUs.		453.50	3.50	90.00	90.00	90.00	90.00	90.00
Project 1.17 Promote science/evidence/ stakeholder-based decision-making for the management and conservation of natural and cultural assets		62.50	2.00	12.50	15.00	15.00	15.00	3.00
PROGRAM 2. PRODUCT DEVELOPMENT: ENRICHING EXPERIENCES, AND INVESTING IN STRATEGIC AND LONG-TERM PRODUCTS		-	-	-	-	-	-	-
Project 2.1. Enriching Experiences for Core Tourism Products: Ridge to Reef: Sun/Sand/Sea; Marine and Diving; Forests and Protected Areas		66.54	9.54	10.11	10.72	11.36	12.04	12.77
Project 2.2. Refining and Defining the Philippine Cultural Experience.		565.39	45.00	62.36	78.75	99.82	122.30	157.16
Project 2.3. Developing and Implementing Frameworks for culturally sensitive interactions and cultural exchanges with residents, especially indigenous peoples and cultural communities		125.97	2.00	17.80	16.42	21.11	33.46	35.17
Project 2.4. Integrating and Coordinating the Development of High-Value Tourism Infrastructure with Product Development		392.33	35.50	50.35	55.36	67.60	82.59	100.93
Project 2.5. Enhancing Well-being.		219.26	19.00	28.06	29.03	36.87	46.83	59.47
Project 2.6. More time, more experiences.		198.60	20.00	24.00	28.80	34.56	41.47	49.77
Project 2.7. Strengthen destinations and stakeholdership		163.24	10.00	14.00	19.60	27.44	38.42	53.78

Project 2.8 Philippine Highlands. Establishing a world-class walking trail that connects landscapes, communities, and nature lovers with the national parks and protected areas of highland areas across the country.	316.80	0.62	114.14	114.71	63.92	11.36	12.04
Project 2.9. Philippine Islands. Envisioning the Philippines as a center for island holidays and marine sports in Asia where opportunities for diving, sailing, yachting, game fishing, and island hopping abound amidst a wide range of beach resorts, linking existing destinations with new ones throughout the archipelagic core of the country.	127.28	-	83.04	10.11	10.72	11.36	12.04
Project 2.10. Heritage Villages. Identifying and developing selected areas/sites that showcase cultural practices, architecture, customs, and way of life of indigenous cultural communities.	109.08	0.30	64.54	10.11	10.72	11.36	12.04
Project 2.11. Town Plazas and Building Pride of Place. Formalize a country-wide program that will motivate local governments and their respective communities to embark on the restoration and enhancement of their municipal, city, and provincial plazas and surrounding areas (if applicable) in a harmonious manner that its cultural value is enhanced while economic and recreational needs are met.	106.08	0.30	61.54	10.11	10.72	11.36	12.04
Project 2.12. The UNESCO Initiative. Establishing a team within DOT to leverage convergences for a national effort to secure the designation of more UNESCO World Heritage Sites, and other UNESCO designations.	142.66	-	22.50	25.05	28.02	31.50	35.59
Project 2.13. Communicating Culture. Through an integrated program that brings together NCCA, FDCP, cultural workers, and associations, developing a multi-platform strategy that communicates the Philippine identity globally.	488.86	0.50	72.20	75.00	84.50	113.85	142.81
PROGRAM 3. MARKET DEVELOPMENT AND PROMOTIONS PROGRAM							
Project 3.1. Sustainable Destination Growth and Recovery Marketing. Restore travel confidence by building on current initiatives, such as the "Wake Up in the Philippines campaign", to maintain a top-of-mind presence in the key foreign markets while moving towards longer-term branding, campaign marketing positions, and messages.	1,566.53	1,285.51	22.80	50.16	59.19	69.03	79.84
Project 3.2. Sustainable, Responsible, and Regenerative Tourism. Targeted at visitors, tourism-related enterprises, and host communities	694.24	20.00	100.00	115.00	132.25	152.09	174.90
Project 3.3. Market Research and Development - carry out specific activities to grow existing, and explore and diversify into, potential international markets	141.41	4.20	16.56	20.78	26.07	32.72	41.08
Project 3.4. Developing existing and new channels for promotions working closely with key stakeholders	2,021.67	152.30	293.50	283.80	291.31	623.25	377.51
PROGRAM 4. CAPACITY BUILDING		Training/capacity development is also integrated into other projects.					



Project 4.1. Institutionalize and empower local tourism offices as destination management organizations - Building the Local Tourism Officer Corps. Developing with HEIs a curriculum of modules for tourism officers to standardize the knowledge and skills of tourism officers and their staff.	510.62	35.20	75.25	68.06	85.19	113.20	133.72
Project 4.2. Enhancing Current Training Programs for Stakeholders. Developing programs that meet the current and future needs of tourism stakeholders given the strategic direction for tourism.	354.70	0.20	95.00	95.00	43.75	52.50	68.25
Project 4.3. Implementing the Philippine Tourism Human Capital Development Plan. Implementing the PTHCD to meet integrated education, and training needs for the industry's development.	1,291.05	60.00	150.00	187.50	234.38	292.97	366.21
PROGRAM 5. INFRASTRUCTURE AND SEAMLESS TRAVEL							
Project 5.1. Improve travel facilitation processes and reduce other barriers and costs to travel	3,379.64	0.65	711.78	664.77	665.96	667.38	669.09
Project 5.2. Tourism Infrastructure Standards. Standards for context-based development of key tourism infrastructure (paths and walkways, view decks, visitor centers, tourism transport terminals, public toilets, campsites) requirements. Investment projects in infrastructure such as accommodation are included here.	1,106,130.84	37,650.25	205,355.32	211,215.28	216,963.12	215,206.01	219,740.86
Project 5.3. Further, enhance and expand airports and seaports for tourism	cost of PPP reflected in 2024 1,358,604.46	123,767.51	1,013,973.86	50,932.64	80,029.80	62,180.20	27,720.45
Project 5.4 Last-Mile Travel Reforms. Providing reliable, safe, convenient last-mile travel for tourists.	15.00	-	15.00	-	-	-	-
Project 5.5 Sustainable Tourism Transportation. Facilitating seamless mobility through the use of sustainable transport modes like e-vehicles, e-trikes, and e-bikes in tourism enclaves and islands.	183.20	0.50	32.70	60.00	90.00	-	-
Project 5.6. Upgrading Tourist Travel Assistance. Facilitating convenience through the provision of reliable and user-friendly online tourism travel information and platforms.	31.53	-	6.00	5.50	6.05	6.66	7.32
Project 5.7. Enhancing the connectivity of transportation infrastructure with tourism destinations, facilities, and sites	730,576.51	180,540.82	54,344.90	92,476.01	132,363.53	144,593.91	126,257.35
Project 5.8. The Provision of Social Support for Tourism Communities. Enhancing the provision of basic services to support tourists and tourism communities, enhancing local development and resilience.	181.16	0.30	20.00	26.00	33.80	43.94	57.12
Project 5.9. Providing Key Infrastructure for Remote Tourism Communities and Sites. Deploying off-grid, renewable, modular solutions in remote areas to provide ICT, water, energy, and waste management services.	2,727.00	235.00	476.00	504.00	504.00	504.00	504.00

SUMMARY	Indicative Budget in PHP Million						
	TOTAL 2023-2028	2023	2024	2025	2026	2027	2028
PROGRAM 1. INSTITUTIONAL DEVELOPMENT	2,260.30	170.80	541.25	470.83	342.59	343.82	391.01
PROGRAM 2. PRODUCT DEVELOPMENT: ENRICHING EXPERIENCES, AND INVESTING IN STRATEGIC AND LONG-TERM PRODUCTS	3,022.08	142.76	624.64	483.77	507.36	567.91	695.63
PROGRAM 3. MARKET DEVELOPMENT AND PROMOTIONS PROGRAM	4,423.85	1,462.01	432.86	469.74	508.82	877.10	673.32
PROGRAM 4. CAPACITY BUILDING	2,156.37	95.40	320.25	350.56	363.31	458.66	568.18
PROGRAM 5. INFRASTRUCTURE AND SEAMLESS TRAVEL	3,201,829.34	342,195.03	1,274,935.55	355,884.20	430,656.26	423,202.10	374,956.20
TOTAL	3,213,691.94	344,066.00	1,276,854.56	357,659.11	432,378.35	425,449.59	377,284.34



PROGRAM BUDGETARY REQUIREMENTS								
PROGRAMS AND PROJECTS	Remarks	Indicative Budget in PHP Million						
		TOTAL 2023-2028	2023	2024	2025	2026	2027	2028
PROGRAM 1. INSTITUTIONAL DEVELOPMENT								
Project 1.1 Institutionalizing mechanisms for convergence		156.73	16.80	25.32	26.59	27.92	29.32	30.79
1.1.1. Reform the membership and processes of the Tourism Coordinating Council for effective interagency collaboration		-						
<i>Conduct a review of RA 9593.</i>	This covers other provisions of RA 9593 other than the membership of the TCC.	1.50	1.50					
<i>Pursue inter-agency development of appropriate standards, processes, and regulations to support the NTDP implementation.</i>								
1.1.2. Align the tourism-related programs and budgets of national agencies with the priorities of the NTDP (institutionalize the annual preparation and calendar of the TDP for submission to the DBM)		-						
<i>Conduct regular annual TDP convergence budgeting (1st quarter) for the next fiscal year and mid-year (2nd qtr) for progress reports of the ongoing projects</i>		2.09	0.30	0.32	0.34	0.36	0.38	0.40
1.1.3. Create a coordination unit in DOT to handle the convergence programs and secretariat of the TCC								
<i>Create a monitoring and evaluation unit and propose institutionalization of the unit as part of the RA 9593 amendment.</i>	Consolidation of 1.1.3 and 1.12.3	120.51	10.00	20.00	21.00	22.05	23.15	24.31
<i>Conduct tourism infrastructure project budget preparation and monitoring of infrastructure and non-infrastructure programs and projects.</i>		32.63	5.00	5.00	5.25	5.51	5.79	6.08
Project 1.2 Establishing the mechanisms to advocate for the prioritization of tourism in the national agenda and to facilitate the operationalization of working groups in the Tourism Coordination Council.		49.74	3.50	7.00	7.70	8.47	12.82	10.25
1.2.1: Strengthen ties and stakeholdership with key government agencies, houses of Congress, local leagues, international organizations, key business groups, and non-governmental organizations.		-						
<i>Develop advocacy program and action plan for the various stakeholders - national and local</i>		6.00	2.50				3.50	
<i>Implement the advocacy program, and action plan including dissemination activities (procure external services)</i>		30.53		5.00	5.50	6.05	6.66	7.32

1.2.2: Establish and operationalize working groups for convergence programs	-							
<i>Conduct annual meetings of the TCC and mid-term meetings of the TCC working groups.</i>	13.21	1.00	2.00	2.20	2.42	2.66	2.93	
Project 1.3. Improving and Institutionalizing Systems for Data Gathering, Reporting, Monitoring, and Evaluation to more effectively support data-driven and evidence-based decision-making for policy and management (particularly in the accomplishment of NTDP goals), internal governance, and public accountability.	418.00	68.00	112.00	82.00	52.00	52.00	52.00	
Consolidation of Project 1.3 and Project 1.12 from the NTDP								
1.3.1 Strengthen and systematize infrastructure for gathering and sharing information including sex-disaggregated data across stakeholders	-							
<i>Implement data visualization utilizing the existing database of DOT (including regional offices) and attached agencies.</i>	90.00	30.00	30.00	30.00	-	-	-	
<i>Strengthen local tourism data collection and management by institutionalizing DOT's Local Tourism Statistics System in the LGU tourism information infrastructure</i>	72.00	12.00	12.00	12.00	12.00	12.00	12.00	
Transferred from 1.17.1								
<i>Conduct scoping of the tourism data collection (specifically domestic, employment in both formal and informal sectors) at the regional and local levels.</i>	16.00	16.00						
<i>Provide technical assistance to the LGUs for the harmonization and synchronization of local tourism data collected across various departments/offices (e.g. BPLO, PESO) of LGUs and related institutions (e.g. PAMB)</i>	10.00	5.00	5.00					
<i>Design and implement smart (digitalized) local tourism data collection in 3 pilot areas.</i>	20.00		20.00					
<i>Upscale and replicate the project in the rest of the regions.</i>	80.00			20.00	20.00	20.00	20.00	
<i>Provide capacity development on data processing, analysis, utilization for decision-making for policy and management, and monitoring and evaluation of the NTDP at the national and local levels.</i>	100.00		20.00	20.00	20.00	20.00	20.00	
1.3.2 Identify and prioritize the digitalization of documentation, processes, and services of DOT and attached agencies to support the tourism industry	-							
Transferred from 1.12.5								
<i>Collaborate with the DICT to assess and formulate ICT-related policies and standards, and improve the delivery of services (intra-department and for external stakeholders).</i>	30.00	5.00	25.00					
Project 1.4. Rationalizing and Streamlining Functions. Clarifying the mandates and functions of the DOT and attached agencies to eliminate redundancies, improve efficiencies, and provide the necessary resources to carry them out.	16.50	12.50	35.00					
1.4.1 Define the mandate and provide the resources for the TPB	-							



Conduct a study to establish funding sources and new business development opportunities for TPB.	1.00	1.00						
Conduct a feasibility study of the new convention/meeting center as part of TPB's business development program.	5.00	5.00						
Identify, and build at least 1 new convention/meeting center to host various rotating conventions, conferences, banquets, meetings, trade shows, and other events. See Program 2 for the budget.								
1.4.2 Redefine the TEZ framework, infrastructure mandates, and investment promotion functions of the TIEZA in light of the implementation of the CREATE Law, then prepare a strategic action plan with an investment program for TIEZA based on the results of the review and redefinition of TIEZA's roles.	-							
Prepare tourism investment strategy and action plan, and marketing and promotions plan.	5.50	5.50						
Consolidate investment data of DOT and TIEZA and develop smart registry/inventory (GIS-based) of tourism investment areas and design the tourism investment inter-active platform.					30.00			
Conduct a review of the travel tax in aid of legislation and alternative funding source – the Tourism Development Fund, a legislative proposal and provide an advocacy program			Transferred from 1.10			1.00		
1.4.3 Merge Tourism Park Agencies								
Conduct study and consultations on the merger of park agencies and design transition program including legislative proposal towards the creation of a National Parks System and its scope (i.e. natural parks only or all parks of natural and cultural heritage)	5.00					5.00		
When approved, set up the National Parks System.			Transferred from Project 1.14.4					
Project 1.5. Integrating Regulation and Stakeholdership. By expanding the scope of the accreditation system, more tourism enterprises can both be monitored and supported to meet accreditation standards such as: a) Environmental/health/safety management standards; b) Training and compliance with social development goals; c) Reporting on visitor data and compliance with various programs; d) Certification programs on sustainability and resilience.	161.87	2.00		19.20	31.00	33.60	36.46	39.61
1.5.1. Conduct a study and action plan for the inclusion of "unclassified" services to embrace the entire industry and conduct consultations with stakeholders at the national and local levels.	-							
Conduct study and action plan, and design innovations in the regulatory and institutional framework.	3.00	1.00		2.00				

1.5.2. Pursue the inclusion of the sharing economy platforms and online booking platforms	-						
<i>Promote the value of DOT accreditation among vendors of sharing economy platforms (and accredited, non-accredited tourism enterprises and the general public) across regions and engage the TCP and the LGUs in advocacy and promotional programs.</i>	61.05		10.00	11.00	12.10	13.31	14.64
<i>Set up a unit in DOT to ensure compliance with the implementation of the Internet Transactions Act (upon approval).</i>	69.62			15.00	16.50	18.15	19.97
<i>Conduct a study on the inclusion of other metrics in the accreditation standards and design incentive schemes to increase the value of accreditation.</i>	1.20		1.20				
1.5.3. Implement automatic and mandatory membership and dues for the Tourism Congress and the bundling of industry associations	-						
<i>Conduct consultations with enterprises on the design of the proposed policy of automatic and mandatory membership of accredited enterprises with TCP.</i>	2.00	1.00	1.00				
1.5.4. Update the online accreditation system to reflect the proposed metrics	-						
<i>Implement continuous quality improvements, and innovation in the online accreditation system.</i>	25.00		5.00	5.00	5.00	5.00	5.00
Project 1.6. Local Tourism Offices. Institutionalizing the tourism offices of local government units to ensure continuity in capacities, programs, and development.	591.43	46.70	178.00	171.04	58.61	41.22	95.86
1.6.1 Strengthen the role of local tourism councils as a mechanism for consultation, coordination, and implementation – Develop local convergences for transportation and infrastructure, health and social services, environmental and cultural conservation, public safety and security for the promotion of barrier-free tourism among others	-						
<i>Design and implement an advocacy campaign to establish the value of tourism and generate the support of local chief executives and councils.</i>	31.20	2.00	5.20	6.00	6.00	6.00	6.00
<i>Conduct consultations with local tourism councils and LGUs.</i>	30.19	2.00	5.00	5.30	5.62	5.96	6.31
<i>Create a DOT-DILG working group to update the MC 95-162 on the formation of local tourism councils. The new MC should provide specific roles and functions for local tourism councils.</i>	0.10	0.10	-	-	-	-	-
<i>Conduct a dissemination forum for the implementation of the new MC in partnership with DILG.</i>	10.00	-	3.00		3.50		3.50
<i>Provide technical assistance to the LGUs for the creation of local tourism councils and crafting of programs in support of the NTDP localization</i>	22.55	-	4.00	4.24	4.49	4.76	5.05



<i>Design and implement a capacity-building program for local chief executives, local tourism councils, and tourism officers (and staff).</i>	110.00	10.00	20.00	20.00	20.00	20.00	20.00
<i>Create local tourism convergence programs with a technical secretariat and ensure the provision of the budget.</i>	82.00	30.00	30.00	22.00	-	-	-
1.6.2 Inclusion of local HEIs in the management of tourism destinations	-	-	-	-	-	-	-
<i>Capacity development program for local HEIs to design research agenda to support NTDP and local tourism development plan implementation including community-based programs and local cultural villages</i>	22.50	2.50	3.00	3.50	4.00	4.50	5.00
<i>Creation of MOA/partnership between LGUs and the local HEIs in research, education, and immersion programs to support local tourism development.</i>	-	-	-	-	-	-	-
<i>Host bi-annual research conferences/conventions to promote sustainable, resilient, inclusive, and competitive tourism specifically on culture and heritage.</i>	47.00	-	12.00	-	15.00	-	20.00
<i>Pursue partnerships of local HEIs with international networks of tourism education and research institutions and organize the hosting of research conferences in the Philippines.</i>	51.00	-	1.00	20.00	-	-	30.00
1.6.3 Build a culture of tourism in local tourism communities	-	-	-	-	-	-	-
<i>Conduct residents' perception surveys/consultations with host communities in partnership with local HEIs.</i>	4.80		4.80				
<i>Develop and implement an awareness campaign program to demonstrate the benefits of cultural conservation/preservation and tourism and how culture and heritage increase the value of tourism.</i>	80.00		40.00	40.00			
<i>Engage the host communities in tourism development planning and processes and develop a pool of tourism champions/ambassadors in the area.</i>	-						
<i>Conduct training programs to include households and all sectors - formal and informal - on their roles in enhancing the tourist experience and the benefits for them.</i>	100.00		50.00	50.00			
<i>Introduce tourism in the local school curriculum and highlight the role of communities in the stewardship of culture and heritage (natural and cultural).</i>	0.10	0.10					
<i>Pursue and leverage partnerships of LGUs, Local Tourism Councils, and Local Arts, Culture, and Creative Councils with schools, government offices, and private enterprises to organize activities to celebrate local culture.</i>	-						
<i>Produce and disseminate (online and offline) a calendar of festivals and leverage as part of the tourism experience</i>	-						
							<i>Link with Programs 2 and 3</i>

Project 1.7. Mainstreaming Resources for Sustainability and Resilience. Providing new and aligning existing funding sources to develop and support sustainability and resilience programs for tourism destinations.	167.00	10.00	30.50	20.00	25.00	39.50	42.00
1.7.1. Communicate the state of the industry, its impact on development, and its role in sustainability, resilience, and competitiveness for people and communities.	-	-	-	-	-	-	-
<i>Prepare case studies to document the impacts of tourism and the importance of stewardship of culture and heritage. Case studies should be relevant for application and integration into the curricula of basic, secondary, and tertiary education.</i>	5.50	-	2.00	-	-	3.50	-
<i>Publish video documentaries of best practices of destinations and submit them for nomination in global tourism awards.</i>	11.00	-	5.00	-	-	6.00	-
<i>Publish Tourism Stories of LGUs, destinations, and people to highlight culture and heritage stewardship and preservation and the critical role of culture and heritage in enhancing the value of tourism and its impacts on destinations.</i>	6.00	-	2.50	-	-	-	3.50
<i>Publish Tourism Stories of LGUs and destinations and their contributions to environmental preservation and nominate for global/international tourism awards (e.g. Tourism for Tomorrow)</i>	6.00	-	2.50	-	-	-	3.50
1.7.2 Implementation/roll-out of technical assistance to LGUs/Destinations	-	-	-	-	-	-	-
<i>Provide technical assistance through toolkits, training, and mentoring to the LGUs, local tourism councils, and tourism enterprises in preparing crisis management and business continuity plans.</i>	135.00	10.00	15.00	20.00	25.00	30.00	35.00
<i>Mainstream disaster risk management and resilience in the tourism plans and practices of LGUs and enterprises'</i>	-	-	-	-	-	-	-
1.7.3 Providing incentives for renewable energy and resources, and for upgrading equipment by tourism enterprises (Review the CREATE Law provision on incentives and identify those that will support (1) investments in alternative and sustainable energy and its support infrastructure (especially in tourism enclaves/resorts/islands) and transport like e-vehicle, e-trike, among others serving these sites, and (2) upgrading by tourism enterprises)	-	-	-	-	-	-	-
<i>Conduct a study on the investment incentives for tourism.</i>	3.50	-	3.50	-	-	-	-
Project 1.8. Optimize public and private partnerships as strategies for sustainable management and operation of tourism in tourism enterprise zones, protected areas, and heritage sites.	30.00	5.00	5.00	5.00	5.00	5.00	5.00
1.8.1 Conduct capacity development on project identification, prioritization, evaluation for potential PPP, and modalities for PPP	30.00	5.00	5.00	5.00	5.00	5.00	5.00
link with Project 1.4 on the investment program							



applicable for operations and management of tourism projects especially local attractions and sites.								
1.8.2 Leverage TIEZA's rules and procedures for Joint Ventures and management contracts for the disposition/privatization of its assets, and future projects under an investment promotions program	link with Project 1.4 on the investment program							
Project 1.9 Adopt inclusion of other non-governmental organizations, and academe in consultative processes	Integrated into Project 1.3							
1.9.1 Identify and update the registry of stakeholders (including other NGOs and academe) and disseminate it on the DOT website	Integrated into Project 1.3							
1.9.2 Create a platform on the DOT website for a consultative process (e.g. submission of comments on issues)	Integrated into Project 1.3							
Project 1.10 Reform the travel tax and provide national and local funding sources for promotions, resilience, sustainability, and development	Integrated into Project 1.4.2							
1.10.1. Conduct a review of the travel tax in aid of legislation and alternative funding source – the Tourism Development Fund, a legislative proposal	Integrated into Project 1.4.2							
1.10.2. Pursue advocacy for the reform and implementation of EIC among tourism stakeholders								
1.10.3. Provide technical support to the DOT, Congress, and other stakeholder groups during public hearings								
Project 1.11 Enhance the role of foreign offices and travel attaches toward market research and developing new markets within an integrated and coordinated framework with the central office		100.25	0.25	20.00	20.00	20.00	20.00	20.00
1.11.1 Create a unit in the DOT central office that coordinates work program preparation and implementation of foreign offices with DOT offices and TPB		100.25	0.25	20.00	20.00	20.00	20.00	20.00
Draft proposal for the creation of the support unit in the central office for the foreign offices and the structure of the foreign offices.								
Secure approval for the proposal and set up the office.								
Update the study on the rationalization of foreign offices and prepare the blueprint for the foreign offices - functions and jurisdictions.								
1.11.2 Review the market research and market development functions of the foreign offices in light of innovations as a result of the COVID-19 pandemic	integrated into the study on rationalization							
Project 1.12 Strengthen evidence-based decision-making, internal governance, and public accountability	Integrated with other Projects							
1.12.1 Create a monitoring and evaluation unit in the DOT for the NTDP to institutionalize the implementation, monitoring, and evaluation of the goals of the NTDP	Integrated with Project 1.3							

1.12.2 Update and institutionalize data (including sex-disaggregated) gathering, monitoring, and reporting of key indicators of tourism impact through the Centralized Tourism Data Center	Integrated with Project 1.3	-		
1.12.3 Institutionalize the monitoring, reporting and evaluation of policies, plans, and projects	Integrated with Project 1.3	-		
1.12.4 Incorporate the values of sustainability, resilience, and competitiveness into all policies, plans, and programs by mainstreaming the components of the TouRIST program: livelihood, disaster risk management, infrastructure, and standards	Integrated with Project 1.13	-		
1.12.5 Identify and prioritize the digitalization of documentation, processes, and services of DOT and attached agencies	Integrated with Project 1.3	-		
Project 1.13. Continuing and Implementing the TouRIST Destination Framework.		0.20	0.20	
1.13.1 Work to secure approval with NEDA-ICC of TouRIST Destination Plans for Coron, El Nido, Bohol, Siargao, Siquijor, and Baguio and implement the projects.		0.20	0.20	
1.13.2 Implement the projects to be approved by the NEDA-ICC.	Project Cost in Program 5	-		
1.13.3 Conduct a needs assessment in the areas of resilience of tourism communities and training programs	transferred from 1.17.5	-		
1.13.2 Expand the Coverage of the TouRIST Framework to New Destinations. Establish a process to identify destinations and priority projects to build resilience.	transferred from 1.17.5	-		
1.13.4 Incorporate the values of sustainability, resilience, and competitiveness into all policies, plans, and programs by mainstreaming the components of the TouRIST program: livelihood, disaster risk management, infrastructure, and standards		-		
1.17.6 Identify priority projects to build the resilience of tourism communities and secure funding support		-		
Project 1.14. Enhancing the Ecotourism Framework. Explore and develop tools for development and conservation, providing a framework for enhancing the tourism value of protected areas between DOT, DENR, and TIEZA.		8.73	4.24	4.49
1.14.1 Enhance the policy framework for and the coverage of more protected areas for nature tourism		-	-	-
<i>Integrate new areas in the National Ecotourism Strategy and Action Plan 2023-2028 (four cluster consultations) and conduct a mid-term assessment</i>		8.73	4.24	4.49
1.14.2 Invest in the provision of appropriate facilities and programs in priority protected areas	Interface with Project 2.8	-		



1.14.3 Mainstream sustainability and regeneration in nature tourism experience	Integrated with Project 1.14.1	-						
1.14.4 Transformation of Network of National Parks.	Integrated with Project 1.4.3	-						
Project 1.15. Developing a Cultural Heritage Tourism Framework. Providing and implementing a framework to properly coordinate the conservation and use of tourism's tangible and intangible heritage, enhancing and communicating significance, between DOT, NCCA, and other cultural agencies.		12.85	0.35	2.50	2.50	2.50	2.50	2.50
1.15.1 Invest in updating and creating new narratives based on the mapping and product assessments		-						
1.15.2 Conduct training for tourism stakeholders as regards the use of the narratives in tour scripts, promotional materials, and product development and packaging		12.85	0.35	2.50	2.50	2.50	2.50	2.50
1.15.3 Prepare an action plan at the local level to mainstream the initiatives in the educational system, curriculum, and projects to sustain pride of place initiatives in the long term		-						
Project 1.16. An Enhanced, Harmonized, and Standardized Process for Tourism Planning that identifies components implementing the Strategic Values and Approaches, also to the 10A Framework, as well as mechanisms to enhance collaboration across clustered LGUs.		453.50	3.50	90.00	90.00	90.00	90.00	90.00
1.16.1. Provide an enhanced framework for national, cluster, and local level coordination of tourism plans. Emphasize the role of the local government in the planning and management of tourism sites.		-	-	-	-	-	-	-
1.16.2 Harnessing the role of PPP in sustainable operations and maintenance of tourism destinations/attractions/sites		453.50	3.50	90.00	90.00	90.00	90.00	90.00
1.16.3 Provide mechanisms for the Department to monitor, regulate, and compel the compliance of tourism destinations with standards, plans, and programs more effectively.		-						
1.16.4 Strengthen the role of the regional offices in supervising and supporting local governments in tourism development within an integrated and coordinated framework with the central office		-						
Project 1.17 Promote science/evidence/ stakeholder-based decision-making for the management and conservation of natural and cultural assets		62.50	2.00	12.50	15.00	15.00	15.00	3.00
1.17.1 Strengthen local tourism data collection and management by institutionalizing DOT's Local Tourism Statistics System in the LGU tourism information infrastructure	Integrated into Project 1.3	-						
1.17.2 Expend cultural mapping (inventory, validation, continuous research) activities and create an online database and registry of cultural assets (national and local levels)		62.50	2.00	12.50	15.00	15.00	15.00	3.00

1.17.3 Review and update the local cultural and tourism development plans and programs and institutionalize heritage conservation and management	Integrated in Project 1.6	-						
1.17.4 Development and promotion of ecotourism and cultural sites within ecological limits, and sanitary and safety standards		-						
1.17.5 Conduct a needs assessment in the areas of resilience of tourism communities and training programs	Integrated into Project 1.13	-						
1.17.6 Identify priority projects to build the resilience of tourism communities and secure funding support	Integrated into Project 1.14	-						
PROGRAM 2. PRODUCT DEVELOPMENT: ENRICHING EXPERIENCES, AND INVESTING IN STRATEGIC AND LONG-TERM PRODUCTS		-						
Project 2.1. Enriching Experiences for Core Tourism Products: Ridge to Reef: Sun/Sand/Sea; Marine and Diving; Forests and Protected Areas		66.54	9.54	10.11	10.72	11.36	12.04	12.77
<i>Conduct product and site assessments</i>		66.54	9.54	10.11	10.72	11.36	12.04	12.77
<i>Accelerate the rollout of the product development manual and training modules for local government units (LGU) to increase the readiness of products and destinations for safe, smart, and sustainable tourism.</i>		-						
Project 2.2. Refining and Defining the Philippine Cultural Experience.		565.39	45.00	62.36	78.75	99.82	122.30	157.16
2.2.1. Integrating Experiences for Built, Tangible, and Intangible Heritage.	Budget for 2.2.1 and 2.2.2	382.68	30.00	39.00	50.70	65.91	85.68	111.39
<i>Develop products and packages based on the results of the cultural mapping and architectural documentation.</i>		-						
<i>Facilitate programs for the management and promotion of cultural and heritage tourism assets through corporate support or community-driven initiatives.</i>		-						
<i>Promote the exchange of good practices showcasing inclusive management systems and innovative cultural tourism experiences such as but not limited to demonstration techniques.</i>		-						
<i>Design and implement new cultural and heritage tourism products based on the adaptive reuse of historic structures and intangible cultural heritage: handicrafts and visual arts, gastronomy, social practices, rituals, festive events, music and performing arts, oral traditions and expressions, and knowledge and practices.</i>		-						
<i>Prepare a creative city strategy and action plan and identify areas for nomination to UNESCO. Leverage the Creative Industries Development Council and Local Arts, Creative, and Cultural Councils for creative tourism.</i>	Link to Project 2.12	-						
2.2.2 Highlighting the Identity of Cultural Aggregations.		-						



<i>Assess the readiness of cultural aggrupations (based on the identification of the DOT, cultural agencies, and NCIP) for the interface of culture and tourism and provide safeguards for participation.</i>	-						
<i>Support the planning processes of cultural aggrupations with support from community-based organizations.</i>	-						
<i>Prepare feasibility of establishing cultural tourism corridors in areas identified by the DOT, cultural agencies, and NCIP (for ancestral domains). The DOT-NCIP MOA covers CAR, Region 2, and CARAGA.</i>	13.83	-	4.61	4.61	4.61		
<i>Conduct training on sustainable tourism management, the use of social networks and social media, and provide support for quality tourism services (including but not limited to waste processing, recycling, water and sanitation hygiene practices).</i>	-						
<i>Develop professional certification schemes for indigenous tourism.</i>	-						
<i>Provide infrastructure such as connectivity, roads, sanitation, and sewerage adapting to the cultural identity of the aggrupations.</i>	-						
2.2.3. Framing Farm/Agri Tourism as Cultural Experiences for education and resilience.	168.88	15.00	18.75	23.44	29.30	36.62	45.78
<i>Design programs with the Department of Education and LGUs to promote educational and knowledge tours to agri-tourism projects.</i>	-						
<i>Provide capacity development (e.g. business planning) for farm/agri-tourism stakeholders to enhance/innovate products as means of expanding revenue streams (e.g. direct markets, education, events, recreation, regenerative tourism product packages) and reducing risks from volatility in agricultural production and depletion of natural resources.</i>	-						
Project 2.3. Developing and Implementing Frameworks for culturally sensitive interactions and cultural exchanges with residents, especially indigenous peoples and cultural communities	125.97	2.00	17.80	16.42	21.11	33.46	35.17
2.3.1. Halal/Muslim-friendly Tourism							
2.3.2. Residents, Indigenous Peoples, Cultural Communities							
2.3.3. Pilgrimage Tourism							
<i>Conduct consultations and develop a code of conduct based on UNWTO guidance and the inputs of the residents, cultural communities, and IPs for responsible and culturally sensitive interactions.</i>	32.65	2.00	2.80	3.92	5.49	7.68	10.76
<i>Organize a dissemination forum for the code of conduct across regions/destinations.</i>	11.25	-	5.00	-	-	6.25	-

<i>Conduct training and capacity development among tour operators, tour guides, national and local governments, indigenous communities, and tourists.</i>	82.07	-	10.00	12.50	15.63	19.53	24.41
Project 2.4. Integrating and Coordinating the Development of High-Value Tourism Infrastructure with Product Development	392.33	35.50	50.35	55.36	67.60	82.59	100.93
2.4.1. MICE and Special Events							
<i>Assist MICE stakeholders in product innovations e.g. sustainable MICE etc.</i>	168.88	15.00	18.75	23.44	29.30	36.62	45.78
2.4.2. Lifestyle and Entertainment	-						
<i>Conduct a study to position the Philippines as the hub for colorful entertainment (e.g. live performances, concerts, cultural and art festivals, creative urban spaces, and other events not hosted in other competitor destinations), by establishing demand and market opportunities.</i>	3.00	-	3.00	-	-	-	-
<i>Enhance strategic partnerships with the private sector in the Philippines and Asia.</i>	-	-	-	-	-	-	-
<i>Position the Philippines as a shopping destination through improvements in products and packaging, and leverage the VAT refund scheme as part of incentive schemes.</i>	2.50	0.50	2.00	-	-	-	-
2.4.3. Domestic and International Cruise Tourism	178.74	18.00	21.60	25.92	31.10	37.32	44.79
<i>Update the national cruise tourism strategy by expanding the geographical coverage of development and integrating the Visayan Seas.</i>	-	-	-	-	-	-	-
<i>Implement the domestic cruise tourism (action plan under preparation).</i>	-	-	-	-	-	-	-
<i>Assess the readiness of LGUs and host communities for the cruise tourism program and their roles/participation in the cruise tourism business.</i>	-	-	-	-	-	-	-
<i>With support from the LGUs, improve the product offerings to increase purchases of local products by cruise passengers.</i>	-	-	-	-	-	-	-
2.4.4. Golf Tourism	-	-	-	-	-	-	-
<i>Develop product packages that promote sustainable golf tourism and linked to Bleisure; conduct training among stakeholders</i>	39.21	2.00	5.00	6.00	7.20	8.64	10.37
Project 2.5. Enhancing Well-being.	219.26	19.00	28.06	29.03	36.87	46.83	59.47
2.5.1. Health and Medical Tourism	213.06	18.00	22.86	29.03	36.87	46.83	59.47



2.5.2. Wellness Tourism		-	-	-	-	-	-	-
<i>Development and Approval of the Joint Administrative Order for the Philippine Medical Tourism Industry Strategy (PMTIS) for 2023-2028</i>		1.00	1.00	-	-	-	-	-
<i>Development of Medical Tourism Accreditation Standards/Guidelines</i>		0.80	-	0.80	-	-	-	-
<i>Establishment of Health Tourism Networks</i>		1.40	-	1.40	-	-	-	-
<i>Development and Implementation of a Health Tourism Communication Plan and its materials</i>		3.00	-	3.00	-	-	-	-
Project 2.6. More time, more experiences.		198.60	20.00	24.00	28.80	34.56	41.47	49.77
2.6.1. Retirement Tourism								
2.6.2. Education Tourism	Link with 2.6.4, 2.6.5	198.60	20.00	24.00	28.80	34.56	41.47	49.77
2.6.3. Digital Nomads		-						
2.6.4. Voluntourism		-						
2.6.5. Gap Year Travel		-						
Project 2.7. Strengthen destinations and stakeholder ship		163.24	10.00	14.00	19.60	27.44	38.42	53.78
2.7.1 Improve the planning of tourism circuits and networks anchored on tourism products.	Link with other projects	163.24	10.00	14.00	19.60	27.44	38.42	53.78
2.7.2 Increase the involvement and importance of the local government units		-	-	-	-	-	-	-
Project 2.8 Philippine Highlands. Establishing a world-class walking trail that connects landscapes, communities, and nature lovers with the national parks and protected areas of highland areas across the country.		316.80	0.62	114.14	114.71	63.92	11.36	12.04
<i>Prepare scoping and master plans for three areas in Luzon, Visayas, and Mindanao.</i>		263.02	0.62	104.60	104.60	53.20	-	-
<i>Identify and package products and sites with a high level of readiness in the short term.</i>		53.78	-	9.54	10.11	10.72	11.36	12.04
Project 2.9. Philippine Islands. Envisioning the Philippines as a center for island holidays and marine sports in Asia where opportunities for diving, sailing, yachting, game fishing, and island hopping abound amidst a wide range of beach resorts, linking existing destinations with new ones throughout the archipelagic core of the country.		127.28	-	83.04	10.11	10.72	11.36	12.04

<i>The Visayan Seas: A Mini-Caribbean Destination Project: Masterplan</i>	73.50	-	73.50	-	-	-	-
<i>Identify and package products and sites with a high level of readiness in the short term.</i>	53.78	-	9.54	10.11	10.72	11.36	12.04
Project 2.10. Heritage Villages. Identifying and developing selected areas/sites that showcase cultural practices, architecture, customs, and way of life of indigenous cultural communities.	109.08	0.30	64.54	10.11	10.72	11.36	12.04
<i>Showcasing Cultural Tourism Villages Project</i>	55.30	0.30	55.00	-	-	-	-
<i>Identify and package products and sites with a high level of readiness in the short term (by phases).</i>	53.78	-	9.54	10.11	10.72	11.36	12.04
Project 2.11. Town Plazas and Building Pride of Place. Formalize a country-wide program that will motivate local governments and their respective communities to embark on the restoration and enhancement of their municipal, city, and provincial plazas and surrounding areas (if applicable) in a harmonious manner that its cultural value is enhanced while economic and recreational needs are met.	106.08	0.30	61.54	10.11	10.72	11.36	12.04
<i>Town Plazas: Pride of Place</i>	52.30	0.30	52.00	-	-	-	-
<i>Identify and package products and sites with a high level of readiness in the short term (by phases).</i>	53.78	-	9.54	10.11	10.72	11.36	12.04
Project 2.12. The UNESCO Initiative. Establishing a team within DOT to leverage convergences for a national effort to secure the designation of more UNESCO World Heritage Sites, and other UNESCO designations.	142.66	-	22.50	25.05	28.02	31.50	35.59
<i>Create a team in DOT to lead the convergence for UNESCO World Heritage Site/creative city designations. Draft joint memorandum circular among relevant agencies.</i>	84.56	-	15.00	15.90	16.85	17.87	18.94
<i>Conduct training/capacity building in the preparation of world heritage nominations</i>	24.62	-	3.00	3.75	4.69	5.86	7.32
<i>Conduct extensive capacity development among identified sites based on levels of readiness.</i>	33.49	-	4.50	5.40	6.48	7.78	9.33
Project 2.13. Communicating Culture. Through an integrated program that brings together NCCA, FDCP, cultural workers, and associations, developing a multi-platform strategy that communicates the Philippine identity globally.	488.86	0.50	72.20	75.00	84.50	113.85	142.81
2.13.1. Tapping the Potential of Film Tourism							
<i>Conduct consultations with LGUs to assess the readiness of destinations and communities as locations for films and film-</i>	5.50	0.50	5.00				



<i>induced tourism/visitation; and to generate support including possible grant of incentives by LGUs.</i>							
<i>Prepare film tourism strategy and action plan (including incentives schemes) and implementation/operational guidelines and ethical code of conduct.</i>	5.20	5.20	-	-	-	-	-
<i>Identify and fund leads generated by foreign offices through familiarization trips.</i>	452.16	50.00	65.00	84.50	109.85	142.81	
<i>In light of digitalization, create an online single-window platform to facilitate approvals and clearances.</i>	20.00	10.00	10.00	-	-	-	-
<i>Document the impacts of film tourism activities and leverage positive impacts for continuous support from national and local partners.</i>	6.00	2.00			4.00		

PROGRAM 3. MARKET DEVELOPMENT AND PROMOTIONS PROGRAM

Project 3.1. Sustainable Destination Growth and Recovery Marketing. Restore travel confidence by building on current initiatives, such as the "Wake Up in the Philippines campaign", to maintain a top-of-mind presence in the key foreign markets while moving towards longer-term branding, campaign marketing positions, and messages.	1,566.53	1,285.51	22.80	50.16	59.19	69.03	79.84
3.1.1. Simplify and harmonize protocols for both domestic and international travel[2]	1,271.01	1,271.01					
<i>Implement digitalized protocols in all entry gateways.</i>	-						-
3.1.2. Adapt the national branding and promotions strategy for recovery[3]	-						-
<i>Procure services to develop the branding and promotions strategy and campaign program.</i>	-						-
3.1.3. Promote vaccination of tourism workers and host communities	-						-
<i>Collaborate with the private sector and LGUs in the roll-out of any national vaccination program to promote confidence.</i>	-						-
3.1.4. Facilitate the restoration of air and sea routes[4]	-						-
<i>Conduct of business missions/meetings with Philippine and foreign carriers including but not limited to familiarization trips.</i>	99.30	10.00	12.00	14.40	17.28	20.74	24.88
<i>Participate in international aviation (routes) and cruise B2B events.</i>	39.72	4.00	4.80	5.76	6.91	8.29	9.95

<i>Collaborate with the airport authorities and operators in designing incentive schemes.</i>	-							-
<i>Facilitate the creation of air service development committees in the gateways as key partners in route development and implementation of business missions and hosted familiarization trips.</i>	6.50	0.50	6.00					-
<i>Propose to host international aviation and cruise/maritime meetings and events in the Philippines.</i>	150.00			30.00	35.00	40.00		45.00
Project 3.2. Sustainable, Responsible, and Regenerative Tourism. Targeted at visitors, tourism-related enterprises, and host communities	694.24	20.00	100.00	115.00	132.25	152.09		174.90
3.2.1. Continue financial support for tourism enterprises to facilitate the reopening of business[5]	-							
<i>Develop schemes with government and private financial institutions to support enterprises in their recovery programs.</i>	-							
<i>Provide incentives such as but not limited to waiver of participation fees to tourism enterprises and LGUs in the travel trade and or consumer activation events/marketing assistance to destinations</i>	-							
3.2.2. Strengthen relations with local governments and destination management organizations.	694.24	20.00	100.00	115.00	132.25	152.09		174.90
<i>Collaborate with the LGUs and/or local tourism councils in documenting practices of enterprises and investments in destinations (e.g. culture and heritage, renewable energy, green and blue jobs) and curate the narratives for promotions by regional and foreign offices.</i>	-							
<i>Provide marketing assistance to promote the practices of destinations by foreign and regional offices in foreign and domestic markets, respectively.</i>	-							
<i>Develop and implement behavior change strategy and action plan targeted at visitors, tourism enterprises, and households and curate the Tourism Stories for marketing and promotions.</i>	-							
<i>Develop sustainability alliances among enterprises and highlight the partnerships in the campaign programs</i>	-							
<i>Provide awards and incentives to destinations and stakeholder groups promoting sustainable, responsible, and regenerative tourism.</i>	-							
3.2.3. Engage stakeholders to ensure the simultaneous and safe reopening along the value chain								
Project 3.3. Market Research and Development - carry out specific activities to grow existing, and explore and diversify into, potential international markets	141.41	4.20	16.56	20.78	26.07	32.72		41.08



<i>Conduct market segmentation studies in both domestic and foreign markets (and utilize them in product development and packaging)</i>	126.11	3.00	15.00	18.75	23.44	29.30	36.62
<i>Design and implement institutionalized travel trade surveys.</i>	15.31	1.20	1.56	2.03	2.64	3.43	4.46
<i>Establish willingness to pay visitors for sustainable, responsible, and regenerative tourism products specifically culture and heritage, and use in product curation and innovation.</i>	-						
Project 3.4. Developing existing and new channels for promotions working closely with key stakeholders	2,021.67	152.30	293.50	283.80	291.31	623.25	377.51
3.4.1. Deepen relationships with traditional channels for tourism promotions, through traditional media, industry trade fairs, conventions	-						
<i>Host private sector-led/initiated meetings and conventions in the Philippines</i>	754.24	80.00	100.00	115.00	132.25	152.09	174.90
<i>Participate in international travel trade fairs, and big-ticket events (e.g. ITB, WTM)</i>	-						
<i>Upscale local travel exchanges, fund MICE Congress, and support LGUs in their MICE promotions</i>	377.12	40.00	50.00	57.50	66.13	76.04	87.45
3.4.2. Develop and implement a comprehensive digital promotions strategy	231.47	30.00	33.00	36.30	39.93	43.92	48.32
3.4.3. Leverage existing and develop new intergovernmental arrangements to maximize tourism exchanges between countries	-						
<i>Participate in international/regional cooperation and free trade arrangements (e.g. ASEAN (including BIMPEAGA), APEC, UNWTO, and PATA)</i>	70.50		15.50	15.00	17.00	8.00	15.00
<i>Host government international/regional meetings/fora such as but not limited to the Philippine Hosting of ASEAN 2027.</i>	400.00		70.00	30.00		300.00	
3.4.3. Bisita Be My Guest: Tap existing or develop new networks in the Filipino diaspora for tourism	-						
<i>Develop packages and promote medical tourism, business tourism, and most importantly heritage tourism as key products to attract diaspora visitors.</i>	-						
<i>Partner with OFW organizations in the Philippines and overseas, LGUs, and educational institutions to promote diaspora tourism products.</i>	113.62	2.00	15.00	18.00	21.60	25.92	31.10
PROGRAM 4. CAPACITY BUILDING							
Project 4.1. Institutionalize and empower local tourism offices as destination management organizations - Building the Local Tourism Officer Corps. Developing with HEIs a curriculum of modules for	510.62	35.20	75.25	68.06	85.19	113.20	133.72

tourism officers to standardize the knowledge and skills of tourism officers and their staff.								
4.1.1 Institutionalize the position of local tourism officer and local tourism offices for major and upcoming destinations	-	-	-	-	-	-	-	-
<i>Provide technical assistance to the LGUs for the formulation and completion of local tourism development plans and incorporate the values of sustainability, resilience, and competitiveness into all policies, plans, and programs by mainstreaming the components of livelihood, disaster risk management, infrastructure, and standards</i>	281.47	25.00	31.25	39.06	48.83	61.04	76.29	
<i>Provide technical assistance to the LGUs for the designation of tourism officers, creation of institutionalized tourism offices, and formulation of local tourism codes.</i>	57.09	5.00	7.00	8.40	10.08	12.10	14.52	
4.1.2 Professionalize the corps of local tourism officers through programmatic and interdisciplinary capacity building, training, and evaluation	-	-	-	-	-	-	-	-
<i>Prepare a needs assessment among the local tourism officers.</i>	11.70	5.20	-	-	-	6.50	-	
<i>Design and implement a continuing learning program for local tourism officers according to the levels of competencies required to carry out their responsibilities.</i>	108.52	-	12.00	15.60	20.28	26.36	34.27	<i>linked with Project 4.3</i>
4.1.3 Integrate the system of data gathering, monitoring, enforcement, and reporting with the national government	-	-	-	-	-	-	-	-
<i>Collaborate with the Philippine Statistical Authority for the regular collection, integration, monitoring, and reporting of LGU tourism-related administrative data and use of six pilot tourism destinations.</i>	51.84	-	25.00	5.00	6.00	7.20	8.64	<i>cross-ref to 1.3</i>
Project 4.2. Enhancing Current Training Programs for Stakeholders.	354.70	0.20	95.00	95.00	43.75	52.50	68.25	
Developing programs that meet the current and future needs of tourism stakeholders given the strategic direction for tourism.								
4.2.1 Under the Tourism Development Program, coordinate and collaborate with the partner agencies in identifying priority projects for women and marginalized groups and in increasing their access to information and opportunities for training programs	-	-	-	-	-	-	-	-
<i>link with Project 4.3</i>								
4.2.2. Collaborate with the DOLE's Public Employment Services Office Network to enhance the registry of skills of marginalized groups and facilitate matching opportunities.	-	-	-	-	-	-	-	-
<i>Provide training programs for LGU PESO and tourism offices to facilitate harmonized data collection, monitoring, and reporting.</i>	234.70	0.20	35.00	35.00	43.75	52.50	68.25	
<i>Develop and implement a system to link PESO networks and facilitate the aggregation of tourism labor data.</i>	120.00	-	60.00	60.00	-	-	-	



Project 4.3. Implementing the Philippine Tourism Human Capital Development Plan. Implementing the PTHCD to meet integrated education, and training needs for the industry's development.	1,291.05	60.00	150.00	187.50	234.38	292.97	366.21
4.3.1 Review and update the plan - and implement the projects 2024-2025 - working group meetings, job fairs, tracer studies, labor market information system across regions, training, monitoring, and evaluation by the end of the plan.	1,291.05	60.00	150.00	187.50	234.38	292.97	366.21
PROGRAM 5. INFRASTRUCTURE AND SEAMLESS TRAVEL							
Project 5.1. Improve travel facilitation processes and reduce other barriers and costs to travel	3,379.64	0.65	711.78	664.77	665.96	667.38	669.09
5.1.1. Advocate for visa upon arrival, e-visa, and visa-free policies for target markets	-						
Collaborate with the DFA, DOJ, BI, and embassies in reducing/removing entry restrictions for target markets (e.g. India, China) and market segments (e.g. educational tourists) through regular alignment meetings among others	-						
Design implementation framework for advanced visa arrangements such as but not limited to visa upon arrival (e.g. Grab and Go) for target markets in specific gateways.	0.50		0.50				
<i>Modernize immigration laws and policies.</i>							
<i>Monitoring of legislative measures</i>		1.00		1.00			
5.1.2. Prepare the roadmap for integrating information infrastructure of tourism, and border control agencies	-						
5.1.3. Support the implementation of the Advance Passenger Information System and Passenger Name Record	1.50		1.50				
<i>Conduct a dissemination forum with stakeholders on the benefits and impacts of the API-PNR for seamless travel and market development.</i>	3,294.15	-	658.83	658.83	658.83	658.83	658.83
<i>Expand the number of e-gates in the arrival area, install e-gates in the departure halls, and enable the use of e-gates by foreign visitors.</i>							
5.1.4 Expand charter flight program for secondary airport development programs	10.00		10.00				
<i>Design and implement digitalized platforms for applications and approval of charter operations.</i>	10.00		10.00				
<i>Host a convention and B2B of air charter operators and business aviation associations in Asia and Philippine tour operators to develop routes including those in island economies, and conduct</i>	0.65	0.65					

<i>technical inspections/familiarization trips for infrastructure development/improvements.</i>								
<i>Design a system of incentives for charter operators and extend them to regular operators based on criteria.</i>								
5.1.5 Update the air service agreements to increase access for future growth	36.84		4.95	5.94	7.13	8.55	10.26	
<i>Organize air talks to update the agreements in light of the amendment of the Public Services Act and promote tourism in the secondary gateways.</i>								
5.1.6. Provide for a system of value-added tax refunds for tourists	-							
<i>Collaborate with retail shops in developing awareness, information, and education campaigns about the VAT refund to tourists.</i>	Assumption: VAT refund bill approved in 2023	25.00		25.00				
<i>Develop an information dissemination program to promote the incentive of VAT refund in foreign source markets by foreign offices and market representatives.</i>		3,379.64	0.65	711.78	664.77	665.96	667.38	669.09
Project 5.2. Tourism Infrastructure Standards. Standards for context-based development of key tourism infrastructure (rooms, paths, walkways, view decks, visitor centers, tourism transport terminals, public toilets, campsites) requirements.	This project is expanded to reflect private sector investments in accommodation (capacity at least 2x the 2019 - pre-COVID level).	1,106,130.84	37,650.25	205,355.32	211,215.28	216,963.12	215,206.01	219,740.86
5.2.1 Conduct a comprehensive assessment of existing and proposed tourism support infrastructure projects vis-à-vis national and local rules and regulations and guided by minimum performance standards and specifications (MPSS)		-	-					
<i>Identify at least two infrastructure projects for each category in select tourism development areas and subject to benchmarks/standards and recommend measures and budget requirements to achieve compliance.</i>		3.50	-	3.50				
5.2.2 Develop a sustainable standard for the design and management of tourism-support infrastructure projects and implement projects		-	-					
<i>Secure approval and implement the TourIST infrastructure and other support projects (currently under NEDA-ICC pipeline)</i>	This includes the WB and ADB-financed pipeline projects.	16,000.50	0.25	4,000.06	5,600.09	4,000.06	1,600.03	800.01
<i>Update the pre-FS, secure approval and implement infrastructure and other support projects (currently with pre-feasibility studies completed by NEDA, DOT, and TIEZA)</i>		2,084.23	-	20.64	619.08	825.44	412.72	206.36
<i>Develop additional tourist rest areas.</i>		600.00		120.00	120.00	120.00	120.00	120.00
<i>Implement destination infrastructure projects.</i>		267,507.02	37,650.00	37,650.00	41,415.00	45,556.50	50,112.15	55,123.37



<i>Invest in new accommodation units to be at par with ASEAN counterparts.</i>	805,305.60		161,061.12	161,061.12	161,061.12	161,061.12	161,061.12
<i>Identify and build a new convention/meeting center to host various rotating conventions, conferences, banquets, meetings, trade shows, and other events. Excludes cost of land acquisition</i>	7,200.00	-	1,800.00	1,800.00	3,600.00	-	-
<i>Develop tourism infrastructure in zones.</i>	7,430.00		700.00	600.00	1,800.00	1,900.00	2,430.00
Project 5.3. Further, enhance and expand airports and seaports for tourism	1,358,604.46	123,767.51	1,013,973.86	50,932.64	80,029.80	62,180.20	27,720.45
5.3.1 Update the DOT-DOTr-CAAP Convergence Program update the MOA for 2022-2028 and activate the Technical Working Group on convergence	-						
<i>Conduct regular meetings of the convergence program</i>							
<i>Implement route development activities</i>							
5.3.2. Prepare the annual and medium-term tourism airport program that reflects the priority airport projects							
<i>Upgrade, expand, and develop airport projects to enhance connectivity.</i>	263,181.64	8,371.76	48,509.41	47,945.36	70,637.46	60,282.20	27,435.45
<i>Implement PPP projects</i>		cost of PPP reflected in 2024	968,395.82	3,395.76	963,566.44	1,089.29	344.34
<i>Invest in refueling of aircraft equipment.</i>	127,027.00	112,000.00	1,898.00	1,898.00	9,048.00	1,898.00	285.00
5.3.3 Cruise Tourism Gateway Enhancement. Improving port infrastructure for cruise tourism -Prepare the annual and medium-term tourism cruise port program that reflects the priority cruise port projects to be identified in the updated cruise tourism strategies	-						
<i>Under preparation</i>							
5.3.4 Secure funding for the priority projects	-						
5.3.5 Implement the route development program for airports and cruise ports							
5.3.6 Monitor the project implementation (under the unit on convergence program - see project 1)							
Project 5.4 Last-Mile Travel Reforms. Providing reliable, safe, convenient last-mile travel for tourists.	15.00	-	15.00	-	-	-	-
5.4.1. Conduct an assessment and inventory of last-mile access from airports, seaports, and major transport terminals	15.00		15.00				
5.4.2. Secure funding for the priority actions	-						

Project 5.5 Sustainable Tourism Transportation. Facilitating seamless mobility through the use of sustainable transport modes like e-vehicles, e-trikes, and e-bikes in tourism enclaves and islands.	183.20	0.50	32.70	60.00	90.00	-	-
5.5.1. Review the CREATE Law provisions on incentives and identify those that will support (1) investments in alternative and sustainable energy and its support infrastructure (especially in tourism enclaves/resorts/islands) and transport like e-vehicle, e-trike, among others serving these sites, and (2) facilitate compliance with standard requirements.	0.50	0.50					
5.5.2. Based on the review, prepare a strategy paper for the inclusion of tourism-related facilities and services not yet covered in the strategic investment priority program (SIPP) that is subject to review every 3 years under the law	1.20		1.20				
5.5.3. Develop a package of incentives and disincentives that will facilitate compliance with standard requirements	1.50		1.50				
5.5.4. Improve the design of tourism, and air. And sea terminals based on international standards and practices that promote barrier-free tourism among others	180.00		30.00	60.00	90.00		
Project 5.6. Upgrading Tourist Travel Assistance. Facilitating convenience through the provision of reliable and user-friendly online tourism travel information and platforms.	31.53	-	6.00	5.50	6.05	6.66	7.32
5.6.1. Prepare a business case for the development of an integrated online platform and application	1.00		1.00				
5.6.2. Upgrade transport infrastructure for smart and contactless travel, and sustainability and resilience based on the results of the business case.	-						
Integrated into other projects							
5.6.3. Establish a 24/7 tourist assistance call center	30.53		5.00	5.50	6.05	6.66	7.32
Project 5.7. Enhancing the connectivity of transportation infrastructure with tourism destinations, facilities, and sites	730,576.51	180,540.82	54,344.90	92,476.01	132,363.53	144,593.91	126,257.35
5.7.1 Expand the scope of work for the enhancement of transportation infrastructure – including roads, bridges, drainage systems, road signages (including those leading to attractions) - and barrier-free amenities based on international standards, including tourism rest areas	-	-	-	-	-	-	-
<i>Increase road access to tourism destinations</i>	303,749.00	17,689.00	22,060.00	40,000.00	58,000.00	76,000.00	90,000.00
<i>Increase road access to communities (IPs) to enable the development of cultural tourism corridors in ancestral domains</i>	3,124.82	405.00	445.50	490.05	539.06	592.96	652.26
link to Program 2							



<i>Survey tourism road infrastructure network and identify bottlenecks and constraints for future improvements as part of the Tourism Infrastructure Network Plan</i>	48.40		48.40					
5.7.2 Develop the strategic roadmap to assess the bottlenecks and constraints	2.50		2.50					
5.7.3 Integrate PUV Modernization and Tourism. Advocating LGUs to adopt route plans that integrate servicing tourism sites and facilities.	-							
<i>Prepare route transport plans and implementation guidelines including ordinances.</i>	3.00		3.00					
5.7.4 Secure funding for the priority actions	-							
<i>Implement road and railway projects to improve mobility in destinations such as Cebu, Davao, and Clark.</i>	423,648.79	162,446.82	31,785.50	51,985.96	73,824.47	68,000.95	35,605.10	
Project 5.8. The Provision of Social Support for Tourism Communities.								
Enhancing the provision of basic services to support tourists and tourism communities, enhancing local development and resilience.	181.16	0.30	20.00	26.00	33.80	43.94	57.12	
5.8.1 Conduct inventory of existing infrastructure for health and social development in tourism communities	181.16	0.30	20.00	26.00	33.80	43.94	57.12	
5.8.2 Prepare the list of priorities for funding by national agencies under the Tourism Development Program	-							
5.8.3 Collaborate with the DOH and DSWD in working with the LGUs for the priority local health and social projects in the tourism communities	-							
5.8.4. Establish funding programs to provide support for tourism communities in times of emergencies and crises								
Project 5.9. Providing Key Infrastructure for Remote Tourism Communities and Sites. Deploying off-grid, renewable, modular solutions in remote areas to provide ICT, water, energy, and waste management services.	2,727.00	235.00	476.00	504.00	504.00	504.00	504.00	504.00
5.9.1 Prepare business case for grant of subsidy program for ICT access and improvement in remote tourism communities	2.00		2.00					
5.9.2. Leverage Executive Order No. 127 and the Digital Philippines program of the DICT for improving internet connectivity in prioritized remote tourism communities	20.00		4.00	4.00	4.00	4.00	4.00	4.00
5.9.3. Provide Free Wi-Fi Access to Tourist Sites		DOT-DICT Convergence 2023-024; budget assumed for an extension to cover more areas.	2,705.00	235.00	470.00	500.00	500.00	500.00

PRODUCT DEVELOPMENT : KEY INTERNATIONAL EVENTS

INTRODUCTION

In this Annex, we have identified the essential and strategic events in which the Philippines must make its presence felt, whether as the host of the event or as a key participant.

Some of these events include intergovernmental summits, others are focused on the tourism industry in general, or for specific sectors or products, while others are events for which hosting will be crucial in establishing that, not only is the country open for global business, investment, and tourism, but that it is ready to realize its potential and take its place among the ranks of the leading middle-income economies.

To this end, a few points must be considered:

1. In many of these events, whether as a host or a participant, the Philippine role can and should be supported not only by public funds and other resources but also by private sector involvement and sponsorships. As such, either or both DOT and TPB will need to develop teams to work with stakeholders and maximize the Philippine participation in these events.
2. A rationalization will be necessary to allocate the responsibilities for events between DOT, TPB, or some other governmental agency. In many cases, another government agency (such as the DFA or the PSC) will likely take the lead in some events, but as regards responsibilities between DOT and TPB, it is proposed those that generally pertain to tourism policy, product, or market research and development should fall under the purview of the DOT, while those that relate more broadly to tourism marketing and promotions, or to MICE activities, should be the responsibility of TPB.
3. Some of these events (such as those of international organizations) may have rotational hostings so it will be necessary to identify when it will be the Philippines' turn. Others will involve proposing or bidding for hosting considerably in advance of the event, and this will also need to be programmed ahead of time. In this regard, either or both DOT and TPB will need to develop teams to prepare these proposals and bids. Also, even as some of these events may be identified and prioritized today, these may yet occur some years in the future.



EVENTS

Tradeshows – Focus primarily on hosting these events, or secondarily, ensuring that Philippine participation is significant

Travel Tradeshows

- A. International
 - 1. ASEAN Tourism Forum (2027) and other ASEAN Meetings
 - 2. World Expo
- B. National
 - 1. Philippine Travel Mart (PTM)
 - 2. PTAA Travel Tour Expo (TTE)

Political Conventions

- A. APEC
- B. ASEAN
- C. United Nations (Different entities within the UN System - UNWTO, UNESCO, UNEP, WHO, etc.)
- D. Routes Meetings

Socio-Civic Organizations

- A. Chambers
 - 1. Philippine Chamber of Commerce
 - 2. Chamber of Commerce of The Philippine Islands
 - 3. Foreign Chambers
- B. Rotary and similar organizations' global and regional summits
- C. Sister City Initiatives

Global Company/Government Agency International/Regional Meetings

- A. Travel Companies
 - 1. Hotel Chains (Hilton, Marriott, IHG, etc.)
 - 2. Airlines
 - 3. Reservation Systems (Amadeus, Sabre, Travelport, etc.)
 - 4. Travel Management Companies (American Express, CWT, etc.)
 - 5. IATA
- B. Consulting Firms (Accenture, Ernst & Young, McKinsey, etc.)
- C. Tech Companies (Microsoft, Dell, Intel, Apple, Google, etc.)
- D. Pharmaceuticals (Abbott, Pfizer, Etc.)
- E. Financial Institutions (Credit Cards [AMEX, Visa, Mastercard], Banks)
- F. Food
- G. BPOs

Sports Events

- A. Asian Games

- B. SEA Games
- C. FIBA
- D. FIVB (Volleyball)
- E. Futbol/Soccer Leagues
- F. Badminton Leagues
- G. Pool Table/Billiards
- H. Bowling
- I. Track & Field
- J. Ironman
- K. Surfing
- L. Dragonboat
- M. Adventure Racing
- N. ESports
- O. Others

Conventions of Associations/Societies and other entities

- A. Government Agencies/International Financial Institutions/NGOs/similar
 - 1. ADB Regional Meetings
- B. Medical
 - 1. International AIDS
 - 2. Philippine Dental Association (PDA)
 - 3. World Congress of Cardiology and other heart associations
 - 4. Obstetrics and Gynecology Conferences
 - 5. International Council of Nurses and similar
 - 6. Others
- C. World Travel and Tourism Council (WTTC)
- D. Pacific Asia Travel Association (PATA)
- E. Madrid Fusion
- F. International Production & Processing Expo and similar
- G. Building & Construction Expo

Travel Tradeshows – focusing on ensuring substantial participation and involvement

- A. ITB Germany
- B. WTM London
- C. ATF
- D. IMEX Tradeshows- Worldwide Exhibition for Incentive Travel, Meetings, and Events
- E. DEMA (Dive show)
- F. Arabian Travel Mart (ATM)
- G. Others



MARKET DEVELOPMENT : INTERNATIONAL MARKET DEVELOPMENT

STRATEGIC OVERVIEW

The focus for this National Tourism Development Plan, in developing an industry that is sustainable, resilient, competitive, and anchored on Filipino identity, must be a gradual transition away from an inordinate focus on the number of arrivals and toward a more substantive and sustainable impact of tourism, initially looking at the economic impact per visitor then transitioning in the medium- to long-term toward a more holistic view that considers the impact on the environment, culture, and communities as well.

The strategy begins in the near- to medium term with the recovery of the Philippines' traditional markets in East Asia (South Korea, China, Japan, Taiwan, and Hong Kong) and the Anglosphere (United States, Australia, Canada, and the United Kingdom) and, in the medium-to-long-term, the diversification and growth of large, high-value markets in Europe and Latin America, the Middle East, and South and Southeast Asia. This diversification and growth, however, requires that the necessary actions are undertaken in the immediate to near-term.

The country should lead with a focused promotions effort that expands and develops a theme of the Philippines as a place of rich and varied experiences, then shifting gradually over time, increasingly defining each of those experiences:

- (1) As a Ridge to Reef destination with its strengths in beaches, islands, and biodiversity, to diving and other marine sports, and to forests and nature adventure;
- (2) For its rich and diverse Cultural Heritage, the blending of its Indigenous, Christian, Muslim, Hispanic, American, Chinese, Indian, and Malay traditions, our legacy as an agricultural nation, as a creative people, a history intertwined with that of East and West, and respecting the diversity of faiths and peoples;
- (3) As a place for High-Value Tourism, including meetings and conventions, health, medical, and wellness tourism, lifestyle and entertainment, domestic and international cruising, golf tourism, and film tourism; and
- (4) For deeper experiences for Long-staying Visitors, for retirement, education, digital nomads, gap year travelers, and voluntourism.²

² In this discussion of our tourism products, we had grouped them according to their thematic/ developmental/ management approaches: (1) For Ridge to Reef Tourism, the central concerns are on carrying capacities, managing environmental impact, and utilizing tourism to protect sensitive environments and biodiversity. (2) For Cultural Tourism, it is on developing deeper, more authentic experiences of peoples, communities, and places, requiring research and narrative building, responsible and respectful interactions with people of different backgrounds, and in conserving tangible and intangible heritage. (3) For High-Value Tourism, it is on facilitating and coordinating the investments of public and private stakeholders in essential infrastructure, and in providing the necessary support in nurturing and accessing markets for these products. (4) For Long-staying Visitors, it is not only in developing programs to encourage tourists to stay in the Philippines for longer periods of time, but also in encouraging and supporting those visitors in exploring the country and encountering its people.

Defining these experiences – not only in terms of promotions but in the actual visitor experience – will be crucial in generating greater economic value for every tourist that visits the Philippines, and in contributing to the conservation of the natural and cultural assets of the country and the development of tourism communities.

Developing these markets will require, not only (1) promotions programs that connect the Philippines effectively with these markets and their interests (especially an online strategy that utilizes specific websites for specific markets), but also (2) diplomacy in building awareness and communication between the countries, (3) establishing and empowering tourism foreign offices to carry out the necessary research, marketing, and interventions, (4) negotiating and developing air and sea access, routes, and connectivity, and (5) providing liberalized visa programs for visitors. Among the barriers to growth confronting Philippine tourism, (6) perceptions regarding safety and security, and (7) the difficulties in travel to and across the country, must be prioritized.

This briefing presents a potential international market development strategy in broad strokes. It will be subject to amendment or refinement with increased data and analysis of these markets, as well as the evolving political, economic, and public emergencies at country, regional, and international levels.

Developing international markets has been approached in the Philippines along two dimensions: the visitors' place of origin (or geographic markets), and in terms of visitor's main activity interests (or products).

GEOGRAPHIC MARKETS

In 2019, the top fifteen international markets – in terms of numbers - for the Philippines were dominated by East Asia and the English-speaking countries (the “Anglosphere”), with the combined total of South Korea, China, Japan, Taiwan, and Hong Kong at 4.8 million, and with the United States, Australia, Canada, and the United Kingdom at 1.8 million arrivals. Visitors from Southeast Asia totaled 369,296, Europe at 192,333, and India at 135,963. Crucially, however, it is important to examine as well the economic impact of tourists from these markets. We have also included the GNI per capita of each country as an indicator of the potential value of an individual tourist from that market.

This table provides some guidance, not only on the markets that provide the greatest yields per tourist, but also on which markets could perform better with campaigns that encourage visitors to (1) stay longer, (2) switch to higher value activities, or (3) integrate higher value activities in their travels. In this regard, the diversification and deepening of tourism products will be crucial in increasing both ADE and LOS.

The top fifteen markets are summarized below:



Rank	Country	Arrivals	ADE	LOS	Receipts/Person	GNI/Capita
1	South Korea	1,989,322	304.25	4.32	1,314.36	35,110
2	China	1,743,309	140.57	9.51	1,336.82	11,880
3	USA	1,064,440	92.19	12.32	1,135.78	70,930
4	Japan	682,788	132.59	5.16	684.16	42,650
5	Taiwan	323,273	100.30	7.68	770.30	32,149
6	Australia	286,170	85.45	11.1	948.50	57,170
7	Canada	238,850	85.70	13.34	1,143.24	48,310
8	United Kingdom	209,206	97.95	11.52	1,128.38	44,480
9	Singapore	158,595	105.98	5.98	633.76	64,010
10	Malaysia	139,882	120.39	6.88	828.28	10,710
11	India	134,963	100.84	8.2	826.89	2,150
12	Germany	103,756	87.48	14.5	1,268.46	51,660
13	Hong Kong	91,653				54,460
14	France	88,577				44,160
15	Indonesia	70,819				4,180

ADE = Average Daily Expenditure
LOS = Average Length of Stay
GNI/Capita = Gross National Income per Capita (2021 World Bank (Taiwan data from 2021 ADB))

Core Markets

In the short-to-medium term, the Philippines’ marketing priorities will be focused on a recovery of its traditional markets in East Asia (South Korea, China, Japan, Taiwan, and Hong Kong collectively generating almost USD 6 billion in receipts) and in the Anglosphere (USA, Australia, Canada, and the UK – collectively generating almost USD 2 billion in receipts). These markets are well-established, with the necessary institutional connections and accessibility to facilitate recovery and growth.

On the other hand, while these markets have historically been a source of the great bulk of arrival numbers for the Philippines, these are also largely the same markets targeted by (and for which the Philippines receives a smaller share) other Southeast Asian states. As such, rather than competing in “beggar-thy-neighbor” strategies for market shares, we should focus on developing multi-dimensional, higher-value experiences that more effectively compete with the offerings of our ASEAN neighbors on more sustainable metrics for tourism growth.

East Asia in particular was a source region for the Philippines that produced large volumes of inbound arrivals and revenue, which also increased rapidly year-to-year before the pandemic. East Asia is anchored by travelers seeking a diversity of experiences built around a sun/beach/islands product but the market has many niches evolving toward greater diversification in tourism product preferences. MICE and cruising are large, growing, and highly competitive products for the region, while weddings and honeymoons, diving and golf, health and wellness, gaming, and leisure, among others, are experiences sought by high-value tourists. Retirement and education (ESL) continue to be opportunities for long-staying visitors.

While this region will remain the foundation of future tourism growth for the foreseeable future, the pandemic has emphasized the need for diversification beyond these handful of markets. The threat of a pandemic within the region remains a possibility, noting historical breakouts of Avian Flu, SARS, and of course, SARS-COVID. China, in particular, also presents a significant risk. It has previously not hesitated to use tourism for leverage in its foreign policy. Given our unresolved territorial disputes and a narrative that frames this within the context of superpower competition, it may do so yet again.

Marketing efforts in East Asia should not only target the residents of these countries but also develop add-on packages with inbound visitors. Marketing efforts can thus package several key destinations within the Western Pacific including the Philippines.

The **Anglosphere** market is characterized both by the sizable Filipino diaspora in these countries and also by the non-Filipino residents of those countries. Strategies will need to be built for, and evolve with, these two sub-markets.

The first is traditionally oriented toward visiting family and relatives. It evolves as succeeding generations of the diaspora change and grow distant from their Philippine roots. Family reunions for example might not be centered around the ancestral house but may instead take place in a hotel or resort, or even be on a domestic cruise or a destination wedding. Returning home for retirement is an option for the migrant generation of the diaspora, while the succeeding generations might be oriented towards reconnecting with the Philippines through gap year travel, volunteer work, or summer study abroad programs.

On the other hand, catering both to the later generations of the diaspora as well as the non-Filipino residents of these countries, strategies would focus on experiences still largely built around a sun/beach/islands product, but it will be crucial to make the Philippine experience more distinct and compelling for these markets to travel long-haul. Developing deeper experiences for cultural (heritage sites and cultural interactions) and ridge-to-reef (nature adventure/hiking/camping and protected areas, diving, surfing, marine, and adventure sports) products will be crucial for these markets. Digital nomads and retirees are markets that can be developed, especially because the lack of a language barrier greatly facilitates the experiences of both. Generating interest with the diaspora's later generations will require utilizing social media, special events, and Fil-Anglo influencers, especially young artists, performers, and chefs, among others.

Developmental Markets

These markets include Southeast Asia and Europe – essentially encompassing all the other countries in the top fifteen (excluding India) as well as their regional neighbors. Philippine arrivals from these regions are but a tiny fraction of the population and economic heft of these regions. As such, the strategy for these markets involves essentially introducing the Philippines as an international tourism destination. While the institutional connections exist between the Philippines and the countries of these regions, the actual and perceived accessibility of these regions to the Philippines should be addressed.

The Philippines has not capitalized on its historical ties to **Europe** although Europeans are not fazed by long distances; many do find their way to Southeast Asia and spend long trips abroad, consuming roughly two weeks to a month's worth of vacation leave days every year. Given the relative affluence of



the European market (and a consciousness of their environmental impact), they potentially can generate substantial and sustainable outcomes for tourism.

The challenge of unlocking European markets had traditionally been framed in two ways: first, as one of cost and access – that there are more and cheaper flights from European capitals to the Southeast Asian hubs compared to those for Manila. However, with more international airlines having access to the key Philippine gateways and destinations, options are increasing, and prices are going down. The second is that the Philippines is too “Western” and not seen as “exotic”. The Philippines does need to truly develop its potential as a cultural destination to stand out among its neighbors. However, this “westernization” also means that our communities are more welcoming of foreigners and that in many destinations throughout the country, locals and foreigners readily mix for more authentic local interactions (rather than by creating enclaves for foreign tourists). Also, leaning into Philippine familiarity with the West can be an asset - Filipino fluency in English, for example, can make a trip both more convenient and more meaningful. However, we need to invest in being properly trained in the nuances of European cultures and to respond to our guests’ needs more effectively, and in trained as well in sharing and discussing matters of culture and history, or environments and biodiversity, to provide deeper and more meaningful experiences as well.

Thus, while Europeans seek out, not only pristine beaches, but also great dive sites and hiking trails (bird watching is of particular note), terrestrial and marine adventure sports, historical and cultural sites and interactions, food, and festivals, deep, authentic, and sustainable experiences must be developed. For more niche markets, health and wellness can be pursued, as well as for digital nomads and retirees. The Philippines can also offer a more accessible (even more immersive, because of a lower language barrier) gap year or voluntourist experience.

Our focus for Europe should still be on the Northern and Western Europeans, communicating diverse experiences while being warm over winter. On the other hand, the Mediterranean region still represents an opportunity market. The historical relationship with Spain should be a source of tours of exploration to find the commonalities and differences in a shared culture. Despite visa-free arrangements, Turkey and Israel could be developed further (although the considerations for halal and kosher must be addressed). Even as connectivity improves, developing the European market will require focused effort in the establishment of direct air routes between European capitals and Philippine gateways.

Pan-ASEAN packages can also be developed for the European market, allowing visitors to go to several ASEAN destinations, thus more concretely integrating the Philippines into the ASEAN experience.

ASEAN, despite its proximity to the country, has been a relatively untapped source market for tourism. For many of the regional leaders in tourism, significant shares of their arrivals are from their neighbors making land borders or short ferry crossings, with the ASEAN visa-free privilege facilitating the growth in intra-regional travel. Such intra-ASEAN travel, however, also tends to yield lower revenue. The Philippines’ location makes it remote from the others, attracting much fewer visitors, but those stay longer and provide greater value. Also, with other ASEAN countries offering similar and competing products – such as beaches and diving, hiking and forests, and other natural attractions – for many ASEAN tourists, traveling across the region might not seem like a viable proposition.

Nevertheless, with its large population, existing and potential air and sea connections, and visa-free travel, ASEAN has significant potential as an important source region. Promoting existing and developing direct air and cruise connections between high-value markets at, and passing through, the regional hubs of Bangkok, Singapore, and Kuala Lumpur with our destinations may facilitate the growth in intra-regional travel. This will need to be coupled with preferential fares for travel within the ASEAN region on ASEAN carriers (such as through special passes to visit various ASEAN destinations for a low price), developing twinning products and regional circuits, and a campaign that encourages ASEAN citizens to think of the entire region as one entity, that traveling across the region should be nothing more than a domestic trip.

Making our tourism offerings Muslim-friendly will be crucial in increasing visitors, as well as building on shared Malay identities. On the other hand, communicating the distinct cultural identity of the Philippines – with its Spanish and American colonial past, and the uniqueness of Philippine Christianity – can be developed into an experience that can be respectful and interesting for cultures that are predominantly Muslim and Buddhist. Furthermore, with its more liberal culture, the Philippines can stand out in the region as a hub for creativity in the visual and performing arts, as well as for hosting events and conventions in this regard.

Within ASEAN, our focus for promotions should be on the airline hub capitals of Bangkok, Singapore, and Kuala Lumpur, targeting not only the residents of these countries but also developing add-on packages with inbound visitors. Marketing efforts can thus package several key destinations within ASEAN to include the Philippines.

The development of ASEAN should also emphasize the southern linkages between Visayas, Palawan, and Mindanao with the provinces of Malaysia and Indonesia, with the underutilized capacity and proximity to key destinations of the central and southern Philippine gateway airports.

Opportunity Markets

These opportunity markets consist of the countries and regions for which arrivals are such small fractions of the source population that a dedicated and long-term effort will be required to develop and grow these markets. Such efforts in some cases will involve diplomacy in establishing or redeveloping awareness through cultural and trade ties; in others, it will require addressing the lack of connectivity between the countries. Even further, a focused and long-running campaign to introduce the country and provide the necessary travel trade networks will be needed.

Indian travelers do visit Southeast Asia, often building on the historical and cultural ties with our ASEAN neighbors and their old and well-established Indian diaspora communities. The Philippines, however, again because of its location at the edge of the region, has a much smaller Indian community, and travel back and forth is also considerably more expensive. While India does have a massive population, it is still in the process of growing its middle class. It is crucial, however, to build relationships today to ensure that we become a key, top-of-mind destination as India rises.

India's potential as a market will be anchored on its millions of citizens looking for new and diverse experiences. The deepening political and economic ties between the two countries should include strategies for increasing mutual access and awareness for travel in both directions. Crucially, as India



grows, the Philippines will need to build its brand within the Indian market as a place for these new and diverse experiences, leveraging our cultural differences as a point of interest while leaning into our facility with English to bridge those differences. Even if a more liberal visa arrangement is established for India, crucial cultural barriers do need to be transcended – on one hand, the large Muslim population of India would benefit from initiatives for Muslim-friendly travel, on the other hand, a similar strategy will be needed to respect the specific needs and requirements of Hindus. The involvement of the local Indian community will be essential in guiding the development of this market.

For the **Middle East and North Africa**, the large number of overseas Filipino workers can provide a way to promote the country with their co-workers and supervisors. However, not only does the Philippines need to shape the tourism industry into one that is more Muslim-friendly, but it must also meet the expectations of ultra-luxury for the wealthy of the region, and also train and assist our overseas Filipino workers in effectively navigating cultural differences in promoting the country. The development of integrated resorts that are capable of catering to the needs of this market will be essential. Developing marketing strategies out of the Middle Eastern transit hubs will be needed to grow these markets.

For **Central and South America**, the distance and cost to cross the South Pacific appears to be the greatest barrier; the second appears to be that of language. However, the opportunity market exists in experiences that explore a shared heritage. The knowledge and awareness of that shared culture remain poor, and it is necessary to build on that foundation. Mexico in particular, being less remote than the others and having a direct historical connection through Acapulco and the Galleon Trade, should be prioritized, and potentially coordinated out of Los Angeles and New York. Product and destination development should necessarily focus on shared yet diverse identities – cultural products in and of Intramuros, Vigan, Taal, Iloilo, Cebu, and Zamboanga, among others – will be essential.

Oceania and the Pacific Islands collectively have a population of a little over 10 million persons, but the opportunity exists in positioning the Philippines as an affordable place (against Australia or New Zealand) for some of the urban services that are lacking in their economies. Many already travel to the Philippines for shopping and leisure, as well as for medical treatment.

Sub-Saharan Africa, with Nigeria, South Africa, Kenya, and Ethiopia leading the way, is a massive and rapidly developing region. Despite the distance, air travel connections already exist. It is, however, the home of many different cultures and countries that must be studied if a coherent strategy is to be developed. Focusing on Nigeria and South Africa – as the largest economies – should be prioritized. Developing marketing strategies out of the Middle Eastern transit hubs will be needed to grow the Sub-Saharan market.

PRODUCTS

In the preceding discussion of geographic markets, we identified many of the tourism products that will be essential in developing those markets.

In terms of activity interests, the 2022 Frost and Sullivan “Consumer Insight Survey of Target Markets” contracted by the Department of Tourism identified the Philippines’ strengths in nature-oriented products (such as Sub/Beaches/Islands, Nature/National Parks/Forests, Mountains/Hiking/Trekking, Diving/Water Sports) ranking competitively against other leading ASEAN destinations. The country however ranks poorly in culture-oriented activities (Historical Landmarks, Cultural/Art Museums or Activities, Religious/Places of Worship, Food Explorations/Cooking Classes), and while it performs well in other experiences, these are often not the primary motivators for travel. Table 2 below summarizes the findings of the Study.

Product	Motivation	Comparative Performance
Sun/Beaches/Islands	76%	Thailand is No1 while the Philippines and Indonesia follow closely behind
Nature/National Parks/Forests	50%	Stiff rivalry between the Philippines, Malaysia, and Indonesia
Mountains/Hiking/Trekking	38%	The Philippines scores highest for adventurous activities
Diving/Water sports	34%	The Philippines is up there with the rest of the world in diving
Historical landmarks	51%	Philippines ranked lowest
Cultural/Art museums or activities	29%	The Philippines ranked very poorly
Religious/places of worship	11%	Philippines ranked poorly
City trips	34%	The Philippines ranked average; Singapore is tops
Shopping	27%	The Philippines ranked below average
Food explorations/Cooking class	27%	Philippines ranked poorly
Romantic getaway	21%	The Philippines scored the highest
Visiting friends/relatives	18%	The Philippines scored very high among the top 3
Nightlife/Entertainment	15%	The Philippines ranked high slightly below Thailand and Singapore
Spa/Wellness/Health/Medical	4%	Philippines ranked high
Farm/Plantation/Vineyard visits		Philippines ranked high
Casino/Gaming		The Philippines ranked high; below Singapore

Source: Frost & Sullivan 2022 Study on The Consumer Insight Survey of Travel Markets

This table thus highlights which products will need greater promotion, and those which need a commitment of resources to improve the quality of the experience.

From the standpoint of marketing these products, however, there are the **Core Products**, which are the primary activity interests for which tourists travel to the Philippines, and the **Value-Adding Products**, which should be connected to the Core Products in promotions and circuit development to enhance the experience of the visitor.

Core Products may be divided into (1) Leisure Products and (2) Business and Lifestyle-Based Products.

- For **Leisure Products**, as indicated in the Frost and Sullivan Study, this includes our sun-beach-islands, diving, and watersports, and increasingly, our forests, mountains, and protected areas. The Philippines has established itself as a leader in these experiences and is competitive within the



ASEAN region, and it is undisputed that many of our visitors travel here primarily for these products. To a lesser extent, some of these leisure products that function as core products also include romantic getaways, visiting friends and relatives, city tours, casino and gaming, and nightlife and entertainment.

- For **Business and Lifestyle-Based Products**, this would include spa/wellness/health/medical travel and a few that are not reflected in the table above, such as meetings/incentives/conventions/events, retirement, education, and other long-staying travel products. While the Philippines has yet to establish its leadership in these tourism products, these products nevertheless are among the primary reasons a person will likely travel to a country.

Value-adding products are those that can and should be tacked onto the promotions and marketing of core products and integrated into the circuit offerings at a particular destination. They provide value in two ways: first, in helping a traveler decide which destination will provide greater value to them – after all, a traveler will want to do other things upon reaching the destination, and the mix of these value-adding products will respond to their specific needs, wants, and interests. These additional experiences such as food and gastronomy, festivals, cultural exploration, and other value-adding activities – when combined with the core products –help to differentiate the various local destinations from each other. Second, they provide value to the destination by encouraging the visitor to stay longer and experience more. Good value-adding products also provide a pitch for the tourist to come back and experience more of what the destination has to offer.

Compatible products can provide added value. For example, a traveler may come for the beach but stay to learn how to dive or to surf. Also, since the Philippines is not yet well known as a cultural destination or its other urban amenities, these can function as value-adding products – the same beach-going traveler may enjoy the food and a city tour, or be intrigued by the cultural practices of an indigenous community, for example.

Table 3 below summarizes the priority product-based segments of Philippine tourism. The mainstream market segments are the core product-based targets which are expected to make up the bulk of foreign and domestic tourists. This implies that the majority of foreign and domestic tourists will be traveling to the Philippines because of their interest or desire to visit local destinations that offer these particular experiences. The business and lifestyle-based segments are those travelers whose interests are related to non-leisure activities that they want to conduct in the Philippines such as business meetings, medical procedures, education, or work over prolonged periods.

Finally, the third group shown in the table reflects smaller – even niche – segments who travel to the Philippines specifically to engage in these particular activities or experiences. It is the activity itself, more than their specific locales, that is the key pull factor that draws these segments to the Philippines. However, mainstream visitors as well as business and lifestyle visitors may also want to try these specialized activities as value-adding compliments to their main leisure or non-leisure programs.

Table 3. Product-Based Segmentation of Philippine Tourist Markets

<p><u>CORE ACTIVITY-BASED MARKETS (Mainstream)</u></p> <ul style="list-style-type: none"> • Sun/Sand/Sea • Marine and Diving • Nature-based, including ecotourism (in forests and protected areas) • City Tourism • Rural and Agritourism 	<p><u>HIGH-VALUE EXPERIENCE SEGMENTS (Special Interest/Niche)</u></p> <ul style="list-style-type: none"> • Food Tourism • Creative Tourism • Voluntourism • Wellness Tourism • Cultural tourism (built, tangible, and intangible heritage, including festivals) • Pilgrimage Tourism • Lifestyle and entertainment (including shopping) • Cruise Tourism (for port cities)
<p><u>BUSINESS AND LIFESTYLE-BASED MARKETS (Typically Non-Leisure)</u></p> <ul style="list-style-type: none"> • Meetings, Incentives, Conventions & Exhibitions (MICE) • Health and Medical Tourism • Education (English as a Second Language Tourism [ESL]) • Digital Nomads and Retirement Tourism 	

MARKETING STRATEGY

The thrust for marketing the country as a destination will be to:

- Strengthen the country’s identity as a leading destination for ridge-to-reef experiences.
- Developing the image of the country as one rich in cultural diversity, embodied in its food, festivals, arts and crafts, cultural practices, communities, and heritage sites, among others.
- Sustaining and elaborating the Philippine market position and brand identity by embedding themes of authentic, sustainable, and responsible tourism into the country’s product experiences and promotional messages.

Given the priority source- and activity-based markets, the tourism marketing and promotions strategy will focus on the following approaches.

1. Enhancement of the tourism brand and identity of the Philippines.

The “It’s More Fun in the Philippines” theme and branding strategy has been well-received by the tourism markets and the Philippine tourism stakeholders. While the consensus in the industry is to sustain the branding strategy and maintain continuity for the Philippine tourism identity, “It’s more fun” also has its limitations. In the past three years, in the context of the pandemic, the “fun” message needed to be toned down in favor of more context-appropriate themes, while still maintaining desired levels of market awareness through variants such as “Wake Up in the Philippines”. Also, it limits the ability to develop and promote products that offer something “more THAN fun”. Deeper discussions of history, culture, and society, for example, to provoke reflection on complicated or even troubling issues do not fit well within the theme of “fun” but are nevertheless legitimate topics to be explored through tourism.



As such, as the Philippines moves in the direction of tourism that is more sustainable, resilient, competitive, and Filipino, the brand may be continued or enhanced to reflect these core values even more strongly, especially in emphasizing a deeper experience that is more than or beyond the fun. Initiatives can be expanded beyond natural settings and include cultural heritage to more deeply reflect authentic Filipino culture and values. Promotional material, in addition to providing snapshots of the diversity of what the Philippines has to offer, must go deeper in exploring the Philippine identity. Focused videos and materials can explore very specific topics – the biodiversity of a specific protected area, specific cultural traditions of a community, or human stories behind key sites and destinations, for example.

In the short term, marketing campaigns can prioritize the promotion of core activity-based segments in the priority country markets. In addition to highlighting the sun-and-beach, marine, nature-based, urban tourism, and rural tourism experiences of the Philippines, customized marketing materials and activities may also be developed for special interest segments in various regional markets.

Business and lifestyle-based market segments (MICE, retirement and working vacations, health, medical, and education) will require separate and targeted marketing and promotions programs. However, these initiatives should still be consistent, as much as possible with the overall tourism brand. Acknowledging that the primary motivations of these segments are very different, the core tourism products can be promoted as unique value-added propositions to their main business and lifestyle activities.

Information and education campaigns designed to internally promote more responsible, inclusive, and sustainable behaviors by visitors, tourism enterprises, and residents of tourism communities should also be implemented.

2. Strengthened use of digital tourism marketing for international and domestic tourism promotions

The standard tools and tactics for promotions such as advertising, trade missions, trade fairs, market-linkage activities of foreign offices, etc. will continue to be important and necessary elements of the Philippine marketing mix. However, the marketing and promotions activities, moving forward, should continue to increase their digital content.

Advertising must move predominantly to digital platforms even as the traditional media (e.g. travel magazines, newspapers, television) have also moved online. Similarly, an increasing proportion of pre- and post-activities for sales missions, trade fairs, and other selling activities are also being conducted digitally and remotely.

Social media platforms such as YouTube, Instagram, TikTok, and future evolutions have continued to gain market influence, especially in tourism. Not only must DOT and TPB invest even more in these platforms, but they must also continue to harness the power of stakeholder engagement and user-generated content on these same channels.

In this regard, building up the digital facility and social media savvy of national marketing officers, local destination marketers, and private tourism is an important human capital investment for the

Philippines. Working with travel platforms to create content for the Philippines, as well as developing tailored and targeted strategies for target geographic and activity-based markets, will be necessary. The integrated management of website and social media promotions, and search engine optimization, will be crucial.

3. Strengthening local brand identities and marketing activities for regional destinations

The destination brands for the various regions of the country should be developed and strengthened while ensuring that they remain consistent and complementary with the national brand. Improving brand recognition and market awareness of more local destinations will also help to re-distribute visitor flows for more manageable destinations. More importantly, stronger local brands will encourage more intra-regional travel and develop the habit and regular patronage of local sites and businesses.

Equally important, regional/provincial tourism councils and their partners in destination marketing should be supported and capacitated for effective destination marketing, especially on digital tools and social media strategies.

4. Market development to diversify the Philippine tourism markets and grow new source markets

As noted earlier, the initial focus of the Philippine marketing activities in the near term will be on the core (East Asian and Anglosphere) markets, and based on the core products ridge-to-reef experiences of sun-sand-sea, marine, nature-based, city, and rural tourism. However, market development initiatives should be undertaken to diversify the pool of source markets for the Philippines toward the developmental and opportunity markets. This would improve the country's resiliency to external shocks that may disrupt the flow of visitors from specific countries – as we experienced on a global scale with COVID-19. Some specific steps that can be immediately undertaken include:

- a) Develop (or re-develop) medium- and long-haul markets by linking access to ASEAN gateways and promoting the compatibility of tourism products. TPB and private tourism partners may explore co-marketing or other cooperative strategies with NTOs or travel industry associations in Bangkok, Singapore, Kuala Lumpur, or Hong Kong to market Philippine products such as sun-and-beach (Singapore), marine and cultural (Thailand), ecotourism and cultural (BIMP-EAGA) to long-haul visitors and residents/expats in these countries. Market linkages to these regional gateways may also be significantly improved if direct access can be opened up to local destinations like Puerto Princesa, Bohol, Legazpi, and Davao. When these airports are ready for regional ASEAN flights, the Philippines should also invest in route development and airport marketing for these local gateways.
- b) Development and promotion of “mainstream” specialty tourism products. Special interest activities are, by definition, attractive to relatively smaller segments of the tourist markets. However, some of these special interest activities also have the potential to generate significant demand as supplementary or optional experiences from the mainstream tourism markets. By raising the profile and expanding the demand for these specialty products, these activities can move beyond niche interest into more valuable mainstream products. Highly immersive experiences that uniquely relate to the destination can be developed and promoted in this way



to mainstream visitors, such as food tourism (which can also be linked to agritourism as a farm-to-fork experience), creative tourism (where visitors are the creators), voluntourism (can be linked to ecotourism and regenerative tourism activities).

MARKET DEVELOPMENT : INTERNATIONAL MARKET PROJECTIONS

The table below provides projections for the number of arrivals from the top 15 international markets of the Philippines following the Baseline, Medium, and High Scenario projections discussed in the main text of the National Tourism Development Plan.

It must be emphasized that these are projections, not targets, but may be useful in defining relevant policies and performance metrics for each of these markets. It must also be emphasized that raw arrival numbers should gradually be deemphasized in favor of a more holistic understanding of the positive and negative tourism impacts on the environment, economies, and communities. As such, other performance metrics should be defined, and relevant projections and targets developed, that are oriented toward sustainability, resilience, and competitiveness.

ARRIVALS PROJECTIONS FROM TOP 15 INTERNATIONAL MARKETS							
	2019	2023	2024	2025	2026	2027	2028
Korea							
High	1,989,322	1,790,390	2,093,761	2,298,662	2,573,198	2,861,640	3,185,402
Medium	1,989,322	1,591,458	2,029,108	2,213,129	2,434,930	2,697,918	3,004,911
Baseline	1,989,322	1,392,525	1,959,482	2,102,419	2,297,667	2,525,444	2,795,395
China							
High	1,743,309	1,045,985	1,817,400	2,009,425	2,240,239	2,588,901	3,002,850
Medium	1,743,309	801,922	1,764,724	1,952,506	2,179,136	2,434,531	2,723,920
Baseline	1,743,309	435,827	1,481,813	1,744,277	1,926,356	2,142,440	2,410,125
USA							
High	1,064,440	1,016,540	1,109,679	1,240,073	1,384,362	1,548,601	1,746,256
Medium	1,064,440	957,996	1,069,762	1,179,400	1,303,939	1,443,934	1,599,449
Baseline	1,064,440	851,552	1,011,431	1,088,369	1,187,330	1,303,087	1,441,922
Japan							
High	682,788	443,812	704,992	780,085	847,476	932,019	1,025,534
Medium	682,788	409,673	682,788	735,704	791,913	852,519	919,375
Baseline	682,788	273,115	614,509	672,546	717,064	765,801	821,053
Taiwan							
High	327,273	229,091	341,837	372,018	407,619	448,871	495,099
Medium	327,273	212,727	325,637	346,339	370,637	396,819	429,382
Baseline	327,273	180,000	310,909	328,026	346,991	369,246	396,491
Australia							
High	286,170	273,292	301,909	331,957	368,730	417,379	466,034
Medium	286,170	257,553	289,604	315,216	345,922	380,277	424,977
Baseline	286,170	243,245	272,577	290,463	313,368	340,113	370,418
Canada							
High	238,850	231,685	250,793	275,872	305,370	339,645	378,577
Medium	238,850	214,965	243,627	263,213	284,709	311,699	342,845
Baseline	238,850	191,080	226,908	238,969	256,656	277,902	298,204



United Kingdom								
High	209,206	199,792	220,754	241,005	263,600	291,006	321,759	
Medium	209,206	177,825	214,604	231,978	250,828	273,039	298,317	
Baseline	209,206	148,269	198,746	213,610	229,917	248,014	270,608	
Singapore								
High	158,595	142,736	166,525	183,177	198,799	218,623	241,064	
Medium	158,595	134,806	162,560	175,803	189,711	206,681	225,522	
Baseline	158,595	126,876	150,665	161,937	174,455	187,935	203,002	
Malaysia								
High	139,882	112,605	146,177	157,577	171,355	188,141	207,725	
Medium	139,882	98,197	140,162	146,876	157,437	170,992	186,393	
Baseline	139,882	90,225	128,691	139,917	147,995	159,256	171,467	
India								
High	134,963	87,726	137,460	159,256	188,948	238,210	303,667	
Medium	134,963	74,230	128,215	142,636	169,514	197,775	243,716	
Baseline	134,963	53,985	114,719	136,313	148,459	161,956	178,826	
Germany								
High	103,756	83,005	114,132	126,665	140,071	155,634	173,791	
Medium	103,756	72,629	106,350	113,976	123,677	135,402	149,201	
Baseline	103,756	68,974	98,568	103,860	112,523	122,313	134,053	
Hong Kong								
High	91,653	92,570	100,818	107,220	115,483	126,710	139,313	
Medium	91,653	82,488	96,236	101,966	108,288	115,346	124,831	
Baseline	91,653	77,905	87,070	91,768	97,381	102,949	111,015	
France								
High	88,577	70,862	96,420	106,292	116,922	129,322	143,495	
Medium	88,577	62,004	89,463	95,486	102,572	110,898	120,908	
Baseline	88,577	53,284	84,148	89,064	95,001	101,823	110,278	
Indonesia								
High	70,819	60,196	74,771	83,566	90,648	99,147	109,769	
Medium	70,819	50,990	72,235	76,839	82,504	89,430	97,872	
Baseline	70,819	47,272	67,278	70,854	75,436	80,380	86,541	

DESTINATION DEVELOPMENT : METROPOLITAN, KEY, EMERGING, AND POTENTIAL DESTINATIONS

INTRODUCTION

This Annex provides a profile of the level of tourism growth and development of the various cities and provinces of the Philippines as tourism destinations. This proceeds from the assumption that while all cities and provinces of the Philippines have something to offer for tourism, it is clear that some localities are further along in the process of tourism growth and development. Also, all localities – regardless of where they are along that process – will have different developmental contexts for tourism. Each locality therefore should take an assessment of their own tourism development needs within the broader context of their development priorities.

Various factors were considered in the development of this profile. We note the variances in the regularity and quality of data reporting of some destinations and regret that it is likely that some destinations should have otherwise been evaluated and classified in one way but may have unfortunately been classified in another.

Consistent with an approach that moves toward a more holistic appreciation of tourism, it includes but does not rely solely on the number or growth rate of tourism arrivals. Rather, in addition to (1) total arrivals and growth, it also includes such variables as (2) the presence of internationally recognized and/or awarded sites, (3) the presence of accommodations, (4) the presence of international or domestic airports or seaports within the proximity of the destination, (5) the number of international or domestic flights, (6) the function of the destination as a primary or secondary urban center and/or for leisure and recreation, among others. In this regard, these criteria loosely correspond to the six of the ten A's of tourism, with “accessibility” being reflected in (4) and (5), with “amenities” and “activities” implied under (2) and (6), while “affinity” may be loosely proxied by (1).

A few considerations:

- [1] It is recommended that, over time, this profile should, with better data, be developed further to reflect the challenges of sustainable tourism development more accurately, especially concerning the other A's.
- [2] The discussion is separated between domestic and international tourism to capture the differences in the current market and to guide future planning activities.
- [3] Lastly and crucially, this profile – especially given the limitations of data collection at the local level – should not be interpreted as a ranking, nor to imply a prioritization of assistance from the national government. Instead, it should underscore the importance (and current insufficiency) of accurate and consistent data collection to develop a data-driven basis for policy-making, and for program development and implementation.



METROPOLITAN DESTINATIONS

A significant share of domestic travel is driven by the services that metropolitan areas and urban centers provide – government and transportation, business and trade, education, and health, among others – are often overlooked in the domestic sphere but are nevertheless crucial components in the vitality and diversity of local tourism. Further, the metropolitan destinations (for both domestic and international travelers) have many of the essential facilities – hotels and resorts, conventions and events centers, airports and seaports, shopping, recreation, and leisure complexes – and some even have key tourism assets, such as beaches and islands, or major national or international level heritage sites. Naturally, the metropolitan destinations include:

Greater Cebu City

Metro Manila

Davao City

KEY DESTINATIONS

These provinces and cities provide a variety of tourist attractions and facilities and already are considerably well-established or becoming such as domestic or international tourism destinations.

Domestic Tourism. One will note that several key destinations function as regional centers for trade and government, while others are distinctly leisure destinations, primarily for sun-beach-island attractions. Others function as leisure areas or secondary urban hubs at the peripheries of the metropolitan centers. Some are even a blend of all these. These key destinations include:

**Cebu Province
Palawan
Camarines Sur
Batangas
Bohol**

**Subic Bay
Boracay
Laguna
Albay
Negros Oriental**

**Rizal Province
Quezon
Cavite
Negros Occidental
Pangasinan**

**Baguio City
Davao del Norte
Bacolod City
Iloilo Province
Ilocos Norte**

International Tourism. Many of the key destinations for international tourism are anchored by their strength as sun-beach-island destinations and supplemented by other attractions – often of a cultural or natural character. Others are also regional urban centers that might have key facilities such as integrated resorts or convention facilities. These destinations include:

**Palawan
Cebu Province
Boracay
Bohol
Cagayan**

**Albay
Ilocos Sur
Iloilo Province
Puerto Princesa City
Occidental Mindoro**

**Clark
Pampanga
Benguet
Davao Oriental
Ilocos Norte**

**Iloilo City
Davao del Sur
El Nido
Siquijor
Camarines Sur**

EMERGING DESTINATIONS

These provinces and cities may have some significant tourism arrivals and attractions but often have significant limitations that need to be addressed.

Domestic Tourism. Some of these destinations are commercial or government centers of less-developed regions, while others might have significant tourism attractions but are considerably remote from major urban centers or have limited accessibility from major airports or seaports; these include the small island provinces that, while increasingly being recognized for their tourism attractions, are nevertheless difficult to travel to and/or lack sufficient economies of scale to support investment in appropriate accommodations and other facilities. For domestic tourism, these emerging destinations include:

Iloilo City	Davao de Oro	Davao Occidental	Davao del Sur
Puerto Princesa City	Cagayan de Oro City	Samar	Pampanga
Leyte	Occidental Mindoro	Ilocos Sur	Siquijor
La Union	Camarines Norte	Zamboanga del Norte	Oriental Mindoro
Zamboanga del Sur	Misamis Occidental	Tacloban City	Misamis Oriental

International Tourism. For international tourism, the emerging destinations include secondary urban centers or provinces at the peripheries of metropolitan or key destinations:

Bacolod City	Negros Occidental	Batangas	General Santos City
Isabela	Aklan	Aurora	North Cotabato
Angeles City	Coron	Cavite	Sarangani
Rizal Province	Misamis Oriental	Zamboanga City	Davao del Norte
Negros Oriental	Batanes	Misamis Occidental	Subic Bay

POTENTIAL DESTINATIONS

For these potential destinations, they might lack several of the six criteria used in evaluating their performance. They might not have compelling attractions (or at the very least, their attractions might not yet be well-known), lack key facilities, are far from an airport or seaport, or do not have significant numbers of visitors. For these, development planning and focused investment will be essential, either in becoming destinations in their own right or coordinating as part of the broader tourism value chain by supplying goods and services to nearby metropolitan, key, or emerging destinations.



Domestic Tourism.

Benguet	Quirino	Sorsogon City	North Cotabato
Cagayan	Aurora	Antique	Sarangani
Clark	Bataan	Capiz	South Cotabato
Angeles City	Bulacan	Guimaras	Sultan Kudarat
Davao Oriental	Nueva Ecija	Biliran	Cotabato Province
Isabela	Tarlac City	Eastern Samar	Cotabato City
El Nido	Zambales	Northern Samar	General Santos City
Aklan	Olongapo City	Southern Leyte	Agusan del Norte
Abra	Marinduque	Zamboanga Sibugay	Agusan del Sur
Apayao	Romblon	Isabela City	Dinagat Islands
Ifugao	Coron	Zamboanga City	Surigao del Norte
Kalinga	Catanduanes	Bukidnon	Surigao del Sur
Mountain Province	Masbate Province	Camiguin	Butuan City
Batanes	Masbate City	Lanao del Norte	
Nueva Vizcaya	Sorsogon Province	Iligan City	

International Tourism.

Cagayan de Oro City	Ifugao	Quezon	Zamboanga Sibugay
Marinduque	Kalinga	Romblon	Isabela City
Oriental Mindoro	Mountain Province	Masbate Province	Bukidnon
Camarines Norte	Baguio City	Masbate City	Lanao del Norte
Catanduanes	La Union	Sorsogon Province	Sultan Kudarat
Samar	Pangasinan	Sorsogon City	Cotabato Province
Tacloban City	Nueva Vizcaya	Antique	Cotabato City
Zamboanga del Norte	Quirino	Capiz	Agusan del Norte
Camiguin	Bataan	Guimaras	Agusan del Sur
Iligan City	Bulacan	Biliran	Dinagat Islands
Davao de Oro	Nueva Ecija	Eastern Samar	Surigao del Norte
Davao Occidental	Tarlac City	Leyte	Surigao del Sur
South Cotabato	Zambales	Northern Samar	Butuan City
Abra	Olongapo City	Southern Leyte	
Apayao	Laguna	Zamboanga del Sur	

DESTINATION DEVELOPMENT : ACCOMMODATION DEMAND

INTRODUCTION

The tables in this Annex provide some indication of the demand for accommodations at various destinations throughout the country, and they are summarized and organized by region.

A few considerations regarding the use of this Annex:

1. There are **significant limitations and challenges in the gathering and use of data** thus affecting the analysis regarding the supply and demand for accommodation facilities. These include:
 - a. Not all regions provided data, or data that was provided was not of the same level of detail as that of others, or did not use the same data gathering methodologies. Some key challenges, in certain cases, include:
 - i. Only total room counts are available, and no data regarding occupancy rates.
 - ii. For some, data on the level of cities and municipalities was provided, in others, only aggregate regional or provincial data was available.
 - iii. Tourist arrivals vary massively from year to year, suggesting significant differences in data reporting or gathering.
 - iv. Data for particular destinations or cities were aggregated with that of the province.
 - b. When available, the data for both arrivals and room supply are often obtained only from accredited establishments. As such, the demand (tourist arrivals) and supply (rooms) reflect only a share of the total market. Data from accredited establishments cannot be generalized across the entire sector given the significant socio-economic differences in the markets of the accredited and non-accredited establishments, as well as the significant shares of people staying with friends and relatives, or at short-term rental establishments.
 - c. We cannot conclude room demand from the 2019 Accommodation Capacity Survey (ACS). While the ACS was available and covered both accredited and unaccredited establishments, estimates of demand could not be extracted since the ACS merely provided room counts and not occupancy. Reiterating an earlier point, data on occupancy for accredited establishments could not be extrapolated to non-accredited establishments because they operate in different markets.
 - d. Available data is limited to the pre-pandemic period. Even if data is available for 2020 onwards, the impact of the pandemic would not give a clear picture of any trends in the demand and supply of rooms.
2. The **tables below summarize available data culled from various sources yet presented to allow the reader to draw their conclusions.** We utilized Freedom of Information requests, the Regional Distribution of traveler reports, and submissions from DOT regional offices.



- a. We have described demand intensity based on the reported 2019 occupancy rate (or depending on available data, the occupancy rate of an earlier), with very low (below 30%), low (30-40%), moderate (40-60%), high (60-70%), and very high (above 70%).
- b. The demand intensity likely reflects only that for accredited establishments. The gap between accredited and non-accredited establishments is substantial, underscoring the need to improve and expand the coverage of monitoring and supervision. However, for purposes of promoting investment in mid- to luxury accommodations, demand among accredited establishments may be the most relevant.
- c. In the event no occupancy rate was provided in the available data, we were constrained to make our estimates of occupancy. Items with asterisks reflect our estimations, subject to the assumptions and data indicated in the notes under each table. The notes also indicate if available data (whether part of the tables or from other sources) may point to particular opportunities, or if we encountered particular issues with the data and our thoughts regarding these issues.
 - i. As a general rule, in making estimates, we have used the accommodation supply data reported together with the arrivals data, on the assumption that these were gathered using complementary methods, using the relevant year for which arrivals and accommodation supply data are available.
 - ii. Also as a general rule, our derived or assumed occupancy rates are premised on all tourists staying for 3 days/2 nights, and that 95% of total room nights are available.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2019) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
NCR (National Capital Region)	848,152	245,138	321,040	286,858	1,709,157	568,755	249,545	392,061	338,521	1,327,066	44,329	65.40	High	44,882
		-71%	31%	-11%	496%		-56%	57%	-14%	292%				
Metro Manila	848,152	245,138	321,040	286,858	1,709,157	568,755	249,545	392,061	338,521	1,327,066	44,329	65.40	High	44,882
		-71%	31%	-11%	496%		-56%	57%	-14%	292%				

1. We note the very significant variation in arrivals throughout the surveyed period. Nevertheless, the 2019 data for both arrivals and occupancy appears consistent with observations.
2. We note the High Demand intensity based on the 65% occupancy rate for 2019, which is consistent with the continued investment in new hotels in the metropolis.
3. In separately procured confidential data, occupancy rates for Metro Manila have generally hovered between 66% and 69% from 2014 to 2019. As such, supply has largely kept pace with demand at a rate that maintained an ADR of PHP 5,000 to 5,500.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2017) from ACS	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
CAR (Cordillera Administrative Region)	88,808	117,241	100,660	89,351	85,066	1,402,582	1,670,484	1,866,927	2,095,299	1,930,049	7,956	71.3*	Very High*	10,239
		0.32	-0.14	-0.11	-1		0.19	0.12	0.12	-1				
Abra	689	344	106	-	54	20,713	7,913	263	-	2,894	206		Very Low*	188
		-0.5	-0.69	-1	1		-0.62	-0.97	-1	1				
Apayao	58	23	12	7	3	5,479	3,843	2,435	5,814	9,492	135		Very Low*	
		-0.6	-0.48	-0.42	-0.57		-0.3	-0.37	1.39	0.63				
Benguet	3,659	4,080	4,301	1,500	787	82,785	86,884	80,341	75,583	107,847	5,636 (incl. Baguio)	82.19*	Very High*	422
		0.12	0.05	-0.65	-0.48		0.05	-0.08	-0.06	0.43				
Baguio City	31,159	50,778	48,261	35,234	38,403	1,083,852	1,243,721	1,473,245	1,724,469	1,497,962				6,440
		0.63	-0.05	-0.27	0.09		0.15	0.18	0.17	-0.13				
Ifugao	29,516	28,312	27,016	35,664	31,594	39,302	36,043	44,165	35,603	39,862	684	30.01*	Low*	1,009
		-0.04	-0.05	0.32	-0.11		-0.08	0.23	-0.19	0.12				
Kalinga	15,006	20,652	8,566	8,378	6,418	104,788	147,290	111,211	119,909	101,233	294	117.49*	Very High*	334
		0.38	-0.59	-0.02	-0.23		0.41	-0.24	0.08	-0.16				
Mountain Province	8,721	13,052	12,398	8,568	7,807	65,663	144,790	155,267	133,921	170,759	1,001	48.30*	Moderate*	1,846
		0.5	-0.05	-0.31	-0.09		1.21	0.07	-0.14	0.28				

1. Occupancy rates were not included in the source data.
2. The asterisked assumed occupancy rate and demand intensity are based on double occupancy, 3D/2N stay, assuming 95% of inventory is available for use, using 2017 numbers.



3. Note further that Baguio and Benguet together comprise 71% of the region's total 2017 accommodation supply.
4. The high occupancy rate of Kalinga (and perhaps also the other provinces) may indicate that travelers may be staying at more than double occupancy, as is likely the case with family travel.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2017) from ACS	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
Region I (Ilocos Region)	68,261	99,147	104,908	82,517	80,133	1,553,531	1,991,321	2,276,097	2,363,259	2,182,102	12,446	55.17*	Moderate*	12,961
		0.45	0.06	-0.21	-1		0.28	0.14	0.04	-1				
Ilocos Norte	35,755	61,556	56,253	51,879	49,017	458,129	493,605	579,460	605,778	471,863	3,180	57.65*	Moderate*	3,989
		0.72	-0.09	-0.08	-0.06		0.08	0.17	0.05	-0.22				
Ilocos Sur	12,251	8,044	6,585	3,939	6,073	244,162	274,112	388,610	333,063	390,949	2,115	53.89*	Moderate*	2,603
		-0.34	-0.18	-0.4	0.54		0.12	0.42	-0.14	0.17				
La Union	12,705	11,597	27,915	18,698	17,501	382,311	459,603	563,154	638,536	642,556	1,991	85.62*	Very High*	2,525
		-0.09	1.41	-0.33	-0.06		0.2	0.23	0.13	0.01				
Pangasinan	7,550	17,950	14,155	8,001	7,542	468,929	764,001	744,873	785,882	676,734	5,160	42.42*	Moderate*	3,844
		1.38	-0.21	-0.43	-0.06		0.63	-0.03	0.06	-0.14				

1. Occupancy rates were not included in the source data.
2. The asterisked assumed occupancy rate and demand intensity are based on double occupancy, 3D/2N stay, assuming 95% of inventory is available for use, using 2017 numbers.
3. The occupancy rates may indicate that travelers may be staying at more than double occupancy, as is likely the case with family travel.
4. Note the significant decline in accommodation supply for Pangasinan from 2017 to 2019, while all other provinces in the region increased.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2019) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
Region II (Cagayan Valley)	202,180	263,048	293,018	270,431	158,074	588,250	563,450	710,698	904,198	1,079,050	7,734			8,003
		0.3	0.11	-0.08	-1		-0.04	0.26	0.27	-1				
Batanes	508	1,226	1,492	1,867	1,346	25,382	26,168	29,352	48,594	43,739	556	22.00	Very Low	638
		1.41	0.22	0.25	-0.28		0.03	0.12	0.66	-0.1				
Cagayan	195,857	256,279	285,773	259,915	148,826	241,891	199,445	224,669	333,815	383,114	2,887	50.33	Moderate	2,998
		0.31	0.12	-0.09	-0.43		-0.18	0.13	0.49	0.15				
Isabela	5,324	4,374	4,609	4,814	5,497	183,500	229,215	318,663	363,637	468,741	3,038	42.37	Moderate	3,043
		-0.18	0.05	0.04	0.14		0.25	0.39	0.14	0.29				
Nueva Vizcaya	491	1,169	1,081	3,304	2,405	131,682	100,995	129,102	147,533	172,444	1,036	46.00	Moderate	944
		1.38	-0.08	2.06	-0.27		-0.23	0.28	0.14	0.17				
Quirino	-	-	63	531	-	5,795	7,627	8,912	10,619	11,012				

1 1 7.43 -1 0.32 0.17 0.19 0.04 217 14.00 Very Low 380

- Occupancy rates were included in the available source data.
- Although the demand intensity throughout the region is generally moderate, very high demand intensity can be seen in Cagayan (excluding Tuguegarao) with a 74% occupancy rate, and Santiago City, with a 57% occupancy rate, is almost high demand intensity

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2019) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
Region III (Central Luzon)	782,481	821,425	367,307	510,777	1,063,829	2,782,571	3,311,350	3,513,824	4,441,772	3,740,745	19,328			20,021
		0.05	-0.55	-1	1		0.19	0.06	-1	1				
Aurora	255	274	95	64	162	154,271	147,087	166,223	265,410	273,744	1,466	13.31	Very Low	1,466
		0.07	-0.65	-0.33	1.53		-0.05	0.13	0.6	0.03				
Bataan	23,233	37,845	27,127	6,954	11,034	221,070	295,064	453,790	299,963	386,815	2,268	42.84	Moderate	2,268
		0.63	-0.28	-0.74	0.59		0.33	0.54	-0.34	0.29				
Bulacan	701	12,016	4,451	682	-	80,553	101,062	284,383	450,744	149,171	936	26.11	Very Low	1,629
		16.1	-0.63	-0.85	-1		0.25	1.81	0.58	-0.67				
Nueva Ecija	-	6,949	1,848	13,209	13,959	25,969	31,565	78,657	292,394	302,771	993	5.89	Very Low	993
		1	-0.73	6.15	0.06		0.22	1.49	2.72	0.04				
Pampanga	-	95,124	104,889	178,397	411,154	-	280,177	182,150	452,502	499,512	6,019 (incl. Clark)	30.00	Low	1,209
		1	0.1	0.7	1.3		1	-0.35	1.48	0.1				
Clark	489,321	615,521	171,463	170,867	391,457	512,659	622,042	325,074	302,295	330,110		65.00	High	
		0.26	-0.72	0	1.29		0.21	-0.48	-0.07	0.09				
Angeles City	224,481	-	-	57,956	45,762	188,348	-	-	50,440	24,031				4,810
		-1	1	1	-0.21		-1	1	1	-0.52				
Tarlac	952	7,876	2,830	4,690	14,796	46,744	21,688	8,906	8,686	93,264	788	25.00	Very Low	788
		7.27	-0.64	0.66	2.15		-0.54	-0.59	-0.02	9.74				
Zambales	-	16,031	21,891	35,708	76,644	-	189,453	361,796	638,651	773,596	4,849	35.00	Low	5,072
		1	0.37	0.63	1.15		1	0.91	0.77	0.21				
SBMA	37,153	29,789	32,713	42,250	98,861	1,395,300	1,623,212	1,652,845	1,680,687	907,731	2,009	59.79	High	
		-0.2	0.1	0.29	1.34		0.16	0.02	0.02	-0.46				
Olongapo City	6,385	-	-	-	-	157,657	-	-	-	-				1,786
		-1	1	1	1		-1	1	1	1				

- Occupancy rates were included in available source data and are for 2019.
- Clark has the highest demand intensity in the region with a 65% occupancy rate, followed by SBMA at 60%
- Data reported indicated that visitors spend the most days in SBMA with an average length of stay of 3D, 2N
- Aurora and Nueva Ecija, even with a significant number of rooms, both have very low occupancy rates



	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2018) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
Region IV-A (CALABARZON)	426,833	257,160	282,897	564,121	244,111	3,888,788	4,835,870	4,848,156	7,051,421	8,670,201	4,496	132.86*	Very High*	19,350
		-0.4	0.1	0.99	-1		0.24	0	0.45	-1				
Batangas	80,493	60,735	59,612	472,546	136,148	1,086,236	1,213,521	1,448,737	2,079,603	2,027,977	1,196	117.18*	Very High*	5,326
		-0.25	-0.02	6.93	-0.71		0.12	0.19	0.44	-0.02				
Cavite	238,074	90,160	134,528	59,998	67,259	465,259	684,940	788,316	1,045,888	1,385,828	744	80.00*	Very High*	5,238
		-0.62	0.49	-0.55	0.12		0.47	0.15	0.33	0.33				
Laguna	98,975	96,705	79,766	18,472	19,776	1,172,607	1,209,243	1,193,830	1,098,480	1,292,589	1,660	70.64*	Very High*	5,358
		-0.02	-0.18	-0.77	0.07		0.03	-0.01	-0.08	0.18				
Quezon	3,744	7,209	4,443	10,139	6,804	616,580	808,541	637,414	1,094,608	1,290,227	517	311.71*	Very High*	1,200
		0.93	-0.38	1.28	-0.33		0.31	-0.21	0.72	0.18				
Rizal	5,547	2,351	4,548	2,966	14,124	548,106	919,625	779,859	1,732,842	2,673,580	379	347.90*	Very High*	2,228
		-0.58	0.93	-0.35	3.76		0.68	-0.15	1.22	0.54				

1. Occupancy rates were not included in the available source data.
2. We note that 2017 ACS reflects only 23% of 2019 ACS, indicative of a large gap in data gathering before 2019 and far exceeds the requirements of the millions of visitors that the region receives. Given the massive number of visitors versus the 2017 ACS, we were constrained to change our approach and use the 2019 ACS in computing the available supply.
3. The asterisked assumed occupancy rate and demand intensity are based on double occupancy, 3D/2N stay, assuming 95% of inventory is available for use, using 2019 arrivals and 2019 ACS.
4. The excessively high numbers may be a result of (a) actual occupancies above 2 per room, as is likely with family travel, (2) the inclusion of campers in the total number of travelers without counting tents/vehicles as accommodations, (3) the inclusion of day trippers in the total number of arrivals, (4) gathering arrivals numbers from sites and not just accommodations facilities, among others.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2017) from ACS	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
MIMAROPA Region	457,911	486,653	725,555	798,247	981,152	1,124,602	1,186,228	1,502,586	1,893,469	1,809,897	18,024			18,937
		0.06	0.49	0.1	0.23		0.05	0.27	0.26	-0.04				
Marinduque	-	82	262	269	453	20,408	33,338	55,307	43,427	36,274	480	38	Moderate	641
		1	2.2	0.03	0.68		0.63	0.66	-0.21	-0.16				
Occidental Mindoro	6,233	4,347	6,460	6,061	5,398	169,677	185,499	139,449	155,889	136,934	1,160	57	Moderate	972
		-0.3	0.49	-0.06	-0.11		0.09	-0.25	0.12	-0.12				
Oriental Mindoro	29,787	22,425	55,078	47,012	31,616	128,835	119,005	229,586	329,671	302,325	3,638	43	Moderate	4,682
		-0.25	1.46	-0.15	-0.33		-0.08	0.93	0.44	-0.08				
Palawan	97,859	101,498	179,987	217,299	382,485	108,989	146,367	234,029	365,883	432,005	2,554	66	High	2,062

		0.04	0.77	0.21	0.76		0.34	0.6	0.56	0.18				
Puerto Princesa City	240,447	284,586	341,974	481,830	441,674	561,613	572,119	658,703	790,162	727,722	5,595	94	Very High	5,467
El Nido	57,130	38,679	62,868	-	17	49,366	27,809	30,756	1,112	445	2,762	38	Low	3,340
Coron	22,855	31,584	71,579	44,618	118,709	35,151	50,389	101,747	163,342	170,857	1,110	77	Very High	1,773
Romblon	3,600	3,452	7,347	1,158	800	50,563	51,702	53,009	43,983	3,335	725	26	Very Low	938

- Occupancy rates were provided in available source data and are for 2019.
- Throughout the region, there is a good demand intensity for accommodation establishments, except for El Nido and Romblon.
- Puerto Princesa City has the highest demand intensity with a 94% occupancy rate, followed by Coron with a 77% occupancy rate.
- Palawan, in general, has a high occupancy rate which shows a potential for additional accommodation establishments.
- Calapan City in Oriental Mindoro and Mamburao in Occidental Mindoro also have high demand intensity with occupancy rates of 93% and 91%, respectively.
- Puerto Galera, on the other hand, has the third most number of rooms in the region (after Puerto Princesa City and El Nido) but has a very low demand intensity with an occupancy rate of 20%.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2019) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
Region V (Bicol Region)	845,778	1,026,104	1,165,759	1,003,485	360,804	3,658,125	4,366,780	4,853,990	5,091,441	2,890,848	14,562			13,844
Albay	374,949	439,169	478,357	395,225	281,099	1,042,646	1,376,881	1,298,313	1,434,338	1,543,952	1,510	61.90	High	4,384
Camarines Norte	32,972	40,837	42,993	41,466	50,016	239,189	355,561	455,935	499,113	854,904	198	87.23	Very High	1,272
Camarines Sur	393,014	495,978	599,851	514,913	13,657	1,668,223	1,915,148	2,344,701	2,568,371	37,885	1,883	61.96	High	4,868
Catanduanes	9,887	6,672	7,407	7,759	7,088	164,825	193,325	215,216	221,463	235,326	3,009	70.30	Very High	496
Masbate Province	2,713	4,479	706	625	574	61,744	65,715	96,530	48,748	38,881	2,257	16.16	Very Low	731
Masbate City	3,925	8,288	7,072	7,800	3,255	194,033	204,219	240,010	102,324	98,357	2,224	31.51	Low	579
Sorsogon Province	11,870	10,212	4,352	7,211	-	169,962	129,516	58,872	70,883	-	1,228	30.01	Low	916



Sorsogon City	16,448	20,469	25,021	28,486	5,115	117,503	126,415	144,413	146,201	81,543	2,253	27.01	Very Low	598
		0.24	0.22	0.14	-0.82		0.08	0.14	0.01	-0.44				

- Occupancy rates were included in the available data and are for 2019.
- For the occupancy rate of Camarines Sur, 2018 data was used due to the unavailability of 2019 data.
- Higher occupancy rates are recorded in the summer months (April and May). Camarines Norte has a 96% occupancy rate during these months which is nearly 30% more than its average occupancy rate.
- Higher occupancy rates are recorded in Albay, Camarines Norte, Camarines Sur, and Catanduanes. Legazpi City, in particular, has a very high demand intensity with a 94.42% occupancy rate and a 100% occupancy rate from April to December.
- Lower occupancy rates are recorded in Masbate and Sorsogon. Masbate Province, in particular, has a very low occupancy rate of 16%.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2019) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
Region VI (Western Visayas)	937,021	1,032,133	1,162,343	783,731	1,245,960	3,644,960	4,113,835	4,643,685	4,129,072	4,558,864	30,802	23.74	Very Low	33,042
		0.1	0.13	-0.33	0.59		0.13	0.13	-0.11	0.1				
Aklan	9,585	10,036	14,591	7,237	24,693	180,497	205,171	204,251	154,149	192,674	15,108 (incl. Boracay)	34.61	Low	1,623
		0.05	0.45	-0.5	2.41		0.14	0	-0.25	0.25				
Boracay	769,560	868,765	986,920	565,351	1,037,619	748,017	813,302	972,994	354,558	932,433				14,169
		0.13	0.14	-0.43	0.84		0.09	0.2	-0.64	1.63				
Antique	4,134	6,722	4,757	6,668	4,439	46,032	56,891	158,168	101,552	64,602	672	18.64	Very Low	918
		0.63	-0.29	0.4	-0.33		0.24	1.78	-0.36	-0.36				
Capiz	5,878	3,374	3,491	4,437	5,748	152,551	184,084	222,296	257,050	304,601	1,386	25.88	Very Low	978
		-0.43	0.03	0.27	0.3		0.21	0.21	0.16	0.18				
Guimaras	3,449	3,471	3,907	7,494	6,011	90,866	103,743	124,349	126,031	97,356	846	15.25	Very Low	915
		0.01	0.13	0.92	-0.2		0.14	0.2	0.01	-0.23				
Iloilo Province	3,093	4,212	5,547	6,558	5,060	203,108	248,098	305,318	340,804	381,610	2,423	16.41	Very Low	2,341
		0.36	0.32	0.18	-0.23		0.22	0.23	0.12	0.12				
Iloilo City	42,677	29,654	28,504	70,787	64,331	912,263	965,000	1,047,406	1,154,550	1,098,722	4,411	50.94	Moderate	5,159
		-0.31	-0.04	1.48	-0.09		0.06	0.09	0.1	-0.05				
Negros Occidental	44,312	35,359	39,043	34,690	25,189	667,011	809,578	852,799	885,434	755,825	2,370	3.71	Very Low	3,282
		-0.2	0.1	-0.11	-0.27		0.21	0.05	0.04	-0.15				
Bacolod City	54,333	70,540	75,583	80,509	72,870	644,615	727,968	756,104	754,944	731,041	3,586	39.99	Moderate	3,657
		0.3	0.07	0.07	-0.09		0.13	0.04	0	-0.03				

1. Occupancy rates were included in available data and are for 2019.
2. For the occupancy rate and accommodation supply of Iloilo City, 2018 data was used due to the unavailability of 2019 data
3. Throughout the region, very low demand intensity is mostly observed. Only the HUCs, Bacolod City and Iloilo City, have moderate demand intensity.
4. No major seasonal variations have been observed.
5. Boracay data appears unusually low, but this may be attributed to the gradual reopening and recovery in 2018-2019 from its closure in 2018.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2017) from ACS	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
Region VII (Central Visayas)	1,935,906	2,323,131	2,881,801	3,602,646	4,267,590	2,658,623	3,619,941	4,068,648	4,465,051	5,116,084	41,465	48.34*	Moderate*	48,490
		0.2	0.24	0.25	-1		0.36	0.12	0.1	-1				
Bohol	215,269	266,313	443,477	641,527	720,364	384,838	731,915	686,858	850,047	854,853	6,789	48.01*	Moderate*	8,626
		0.24	0.67	0.45	0.12		0.9	-0.06	0.24	0.01				
Cebu	120,708	126,771	251,630	456,313	443,293	218,239	261,806	467,369	630,623	641,113	28,594 (incl. Greater Cebu City)	48.99*	Moderate*	9,276
		0.05	0.98	0.81	-0.03		0.2	0.79	0.35	0.02				
Greater Cebu City	1,467,931	1,748,745	1,993,579	2,322,094	2,930,699	1,504,385	2,026,765	2,145,636	2,140,158	2,600,113				24,922
		0.19	0.14	0.16	0.26		0.35	0.06	0	0.21				
Negros Oriental	104,926	140,329	148,719	115,924	87,521	517,016	554,550	716,393	766,985	937,352	3,417	73.01*	Very High*	4,407
		0.34	0.06	-0.22	-0.25		0.07	0.29	0.07	0.22				
Siquijor	27,072	40,973	44,396	66,788	85,713	34,145	44,905	52,392	77,238	82,653	2,665	10.47*	Very Low*	1,259
		0.51	0.08	0.5	0.28		0.32	0.17	0.47	0.07				

1. Occupancy rates were not included in the available data.
2. The asterisked assumed occupancy rate and demand intensity are based on double occupancy, 3D/2N stay, assuming 95% of inventory is available for use, using 2017 data.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2019) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
Region VIII (Eastern Visayas)	42,046	46,896	56,343	50,674	51,864	1,008,375	1,137,498	1,409,849	1,724,446	1,582,776	8,845			9,962
		0.12	0.2	-0.1	-1		0.13	0.24	0.22	-1				
Biliran	952	516	1,479	1,159	2,251	12,780	6,799	21,818	17,311	32,531	416	26.56	Very Low	472
		-0.46	1.87	-0.22	0.94		-0.47	2.21	-0.21	0.88				
Eastern Samar	210	1,877	2,173	1,016	912	4,511	44,385	76,301	78,064	76,064	1,001	56.93	Moderate	984
		7.94	0.16	-0.53	-0.1		8.84	0.72	0.02	-0.03				



Leyte	8,466	3,109	14,004	10,804	11,421	213,379	236,157	382,661	576,855	396,218	4,214	27.98	Very Low	2,993
		-0.63	3.5	-0.23	0.06		0.11	0.62	0.51	-0.31				
Tacloban City	25,636	16,001	24,308	23,081	25,802	444,430	497,818	506,792	534,196	563,686		68.06	High	2,523
		-0.38	0.52	-0.05	0.12		0.12	0.02	0.05	0.06				
Northern Samar	627	518	822	643	647	63,707	73,162	82,611	103,212	110,514	846	28.39	Very Low	853
		-0.17	0.59	-0.22	0.01		0.15	0.13	0.25	0.07				
Samar	3,583	21,862	6,967	8,723	6,498	148,614	155,995	205,222	250,253	239,608	1,303	11.25	Very Low	1,141
		5.1	-0.68	0.25	-0.26		0.05	0.32	0.22	-0.04				
Southern Leyte	2,572	3,013	6,590	5,248	4,333	120,954	123,182	134,444	164,555	164,155	1,065	37.91	Low	996
		0.17	1.19	-0.2	-0.17		0.02	0.09	0.22	0				

- Occupancy rates were included in available data and are for 2019.
- Eastern Samar has a moderate demand intensity with an occupancy rate of 57%. Tacloban City has an occupancy rate of 68% which corresponds to high demand intensity.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2019) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
Region IX (Zamboanga Peninsula)	9,080	12,028	10,851	16,830	12,114	608,812	653,812	684,746	1,096,952	1,147,770	7,316	45.72*	Moderate*	7,341
		0.32	-0.1	0.55	-1		0.07	0.05	0.6	-1				
Zamboanga del Norte	4,835	7,211	3,455	5,389	4,874	212,733	243,105	234,525	356,514	518,360	2,238	67.42*	High*	1,946
		0.49	-0.52	0.56	-0.1		0.14	-0.04	0.52	0.45				
Zamboanga del Sur	-	-	154	2,469	489	-	-	11,201	164,939	165,940	4,286	11.20*	Very Low*	1,655
		1	1	15	-0.8		1	1	13.7	0.01				
Zamboanga City	4,211	4,817	7,239	8,886	6,691	392,086	398,970	413,846	489,739	387,853				2,750
		0.14	0.5	0.23	-0.25		0.02	0.04	0.18	-0.21				
Zamboanga Sibugay	34	-	3	86	60	3,993	11,737	25,174	85,760	60,462	720	24.24*	Very Low*	826
		-1	1	27.7	-0.3		1.94	1.14	2.41	-0.29				
Isabela City	-	-	-	-	-	-	-	-	-	15,155	72			164
		1	1	1	1		1	1	1	1				

- Occupancy rates were not included in the available data.
- The asterisked assumed occupancy rate and demand intensity are based on double occupancy, 3D/2N stay, assuming 95% of inventory is available for use, using 2019 data.
- Data for Zamboanga City and Isabela City were lacking.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2019) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				

Region X (Northern Mindanao)	98,211	91,855	73,316	63,444	60,799	2,596,975	2,511,194	2,977,433	3,039,362	2,736,274	13,708	58.85*	Moderate*	12,227
		-0.06	-0.2	-0.13	-1		-0.03	0.19	0.02	-1				
Bukidnon	41,720	4,778	1,672	1,988	549	613,187	283,236	321,812	310,600	185,639	2,220	24.19*	Very Low*	1,284
		-0.89	-0.65	0.19	-0.72		-0.54	0.14	-0.03	-0.4				
Camiguin	12,060	12,882	8,809	16,231	13,749	589,013	620,643	559,840	750,874	790,996	777	298.69*	Very High*	4,018
		0.07	-0.32	0.84	-0.15		0.05	-0.1	0.34	0.05				
Lanao del Norte	351	426	207	615	94	30,310	30,854	35,610	39,311	29,520	1,473	5.8*	Very Low*	340
		0.21	-0.51	1.97	-0.85		0.02	0.15	0.1	-0.25				
Iligan City	1,404	941	1,532	3,200	2,876	169,450	74,989	242,873	353,496	205,562				1,211
		-0.33	0.63	1.09	-0.1		-0.56	2.24	0.46	-0.42				
Misamis Occidental	7,476	3,516	5,213	2,700	2,309	550,392	744,770	1,075,848	573,121	399,403	1,568	73.88*	Very High*	
		-0.53	0.48	-0.48	-0.14		0.35	0.44	-0.47	-0.3				
Misamis Oriental	279	3,657	2,599	1,233	610	43,343	51,570	116,597	173,092	162,442	7,670	6.13%	Very Low*	1,356
		12.1	-0.29	-0.53	-0.51		0.19	1.26	0.48	-0.06				
Cagayan de Oro City	34,921	65,655	53,284	37,477	40,612	601,280	705,132	624,853	838,868	962,712				4,018
		0.88	-0.19	-0.3	0.08		0.17	-0.11	0.34	0.15				

1. Occupancy rates were not included in the available data.
2. The asterisked assumed occupancy rate and demand intensity are based on double occupancy, 3D/2N stay, assuming 95% of inventory is available for use, using 2019 data.
3. Data for Iligan City and Cagayan de Oro City were lacking.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2015) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019				
Region XI (Davao Region)	174,165	167,705	148,108	198,005	216,219	2,649,625	3,112,225	3,042,801	3,716,546	4,911,419	22,887	35.58*	Low*	13,582
		-0.04	-0.12	0.34	-1		0.17	-0.02	0.22	-1				
Davao de Oro (Compostella Valley)	158	436	713	193	997	206,490	130,181	102,025	563,241	1,616,367	402	148.25*	Very High*	593
		1.76	0.64	-0.73	4.17		-0.37	-0.22	4.52	1.87				
Davao del Norte	40,878	40,542	13,896	6,779	25,663	651,267	976,614	853,765	808,895	687,387	2,219	89.95*	Very High*	3,079
		-0.01	-0.66	-0.51	2.79		0.5	-0.13	-0.05	-0.15				
Davao del Sur	433	580	596	4,004	530	9,401	35,344	63,473	34,321	79,932	8,699	0.33*	Very Low*	550
		0.34	0.03	5.72	-0.87		2.76	0.8	-0.46	1.33				
Davao City	128,622	124,350	126,298	184,495	183,730	1,586,688	1,716,224	1,838,311	2,150,185	2,345,468	10,737	50.05	Moderate	8,240
		-0.03	0.02	0.46	0		0.08	0.07	0.17	0.09				
Davao Occidental	-	2	-	-	-	-	5,000	1,303	13,100	188	134			



		1	-1	1	1		1	-0.74	9.05	-0.99					
Davao Oriental	4,074	1,795	6,605	2,534	5,299	195,779	248,862	183,924	146,804	182,077		696	82.81*	Very High*	1,120
		-0.56	2.68	-0.62	1.09		0.27	-0.26	-0.2	0.24					

1. Occupancy rates were not included in available data, except for Davao City, which for both accommodation supply and occupancy for 2019.
2. The asterisked assumed occupancy rate and demand intensity are based on double occupancy, 3D/2N stay, assuming 95% of inventory is available for use, using 2015 data.
3. Data for Davao Occidental was lacking.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2019) from eFOI	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS	
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019					
Region XII (SOCCSKSARGEN)	34,720	46,872	20,044	18,810	25,216	904,641	988,485	1,240,720	1,681,914	1,862,861		9,769			9,173
		0.35	-0.57	-0.06	-1		0.09	0.26	0.36	-1					
North Cotabato	36	1,140	34	79	34	101,114	81,108	153,412	254,027	196,527		1,638	29.48	Very Low	1,765
		30.7	-0.97	1.32	-0.57		-0.2	0.89	0.66	-0.23					
Sarangani	15,593	11,253	6,910	435	415	77,443	87,556	107,552	192,364	198,892		589	39.96	Low	647
		-0.28	-0.39	-0.94	-0.05		0.13	0.23	0.79	0.03					
General Santos City	12,200	8,567	10,822	11,417	17,074	472,306	514,168	595,040	635,740	542,413			46.00	Moderate	3,069
		-0.3	0.26	0.05	0.5		0.09	0.16	0.07	-0.15					
South Cotabato	1,771	856	1,090	4,989	3,042	125,297	107,492	180,492	321,590	672,746		5,451	21.48	Very Low	2,048
		-0.52	0.27	3.58	-0.39		-0.14	0.68	0.78	1.09					
Sultan Kudarat	132	139	136	77	71	18,757	28,939	34,670	29,342	49,469		1,438	44.43	Moderate	962
		0.05	-0.02	-0.43	-0.08		0.54	0.2	-0.15	0.69					
Cotabato City	4,975	24,908	1,052	1,813	4,580	72,330	122,135	103,076	172,195	202,814		653	59.69	Moderate	682
		4.01	-0.96	0.72	1.53		0.69	-0.16	0.67	0.18					

1. Occupancy rates were included in available data and are for 2019.
2. Accommodation supply data for General Santos City was not included but occupancy rate was nevertheless reported.

	International Tourist Arrivals and Growth Rate					Domestic Tourist Arrivals and Growth Rate					Accommodation Supply (2017) from ACS	Occupancy Rate (%)	Demand Intensity	Accommodation Supply (2019) from ACS	
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019					
Region XIII (CARAGA)	49,513	64,119	63,332	30,056	105,302	1,195,183	1,071,564	1,279,873	1,271,677	1,262,058		7,667	51.43*	Moderate*	5,555
		0.29	-0.01	-0.53	2.50		-0.10	0.19	-0.01	-0.01					
Agusan del Norte	516	507	395	366	75	57,883	48,226	45,620	62,564	72,935		2,556	8.24*	Very Low*	86
		-0.02	-0.22	-0.07	-0.80		-0.17	-0.05	0.37	0.17					
Butuan City	7,779	18,246	9,920	11,849	5,426	157,350	155,601	365,594	362,812	288,579					

		1.35	-0.46	0.19	-0.54		-0.01	1.35	-0.01	-0.20				
Agusan del Sur	362	126	524	592	-	155,420	156,169	162,027	188,240	187,703	1,019		819	
		-0.65	3.16	0.13	-		0.00	0.04	0.16	0.00				
Dinagat Islands	729	1,065	2,409	843	1,018	65,028	48,194	82,279	86,509	75,821	163	135.95*	Very High*	244
		0.46	1.26	-0.65	0.21		-0.26	0.71	0.05	-0.12				
Surigao del Norte	38,509	41,825	48,872	15,096	98,355	579,961	437,491	415,047	298,338	558,628	2,335	81.14*	Very High*	3,061
		0.09	0.17	-0.69	5.52		-0.25	-0.05	-0.28	0.87				
Siargao Islands	-	-	-	57,037	-	-	-	-	123,843	-				
		-	-	-	-	-	-	-	-	-				
Surigao del Sur	1,618	2,350	1,212	1,310	428	179,541	225,883	209,306	273,214	78,392	1,594	14.26*	Very Low*	1,345
		0.45	-0.48	0.08	-0.67		0.26	-0.07	0.31	-0.71				

1. Occupancy rates were not included in the available data.
2. The asterisked assumed occupancy rate and demand intensity are based on double occupancy, 3D/2N stay, assuming 95% of inventory is available for use, using 2019 data.
3. Data for Butuan, Agusan del Sur, and Siargao were lacking.



DESTINATION DEVELOPMENT : GUIDELINES FOR TOURISM REST AREA DEVELOPMENT

INTRODUCTION

The development of Tourist Rest Areas (TRAs) is one of the flagship projects of the Department of Tourism (DOT). The TRAs aim to improve the overall tourist experience by improving the convenience, cleanliness, and safety of travelers throughout the country while enhancing the experience and sense of place of a destination.

This Annex lays out standard design guidelines (the Guidelines) for the development of Tourist Rest Areas (TRAs) by or through the DOT, the Tourism Infrastructure and Enterprise Zone Authority, the Department of Public Works and Highways, and Local Government Units. These Guidelines have been developed to ensure that TRAs improve the overall tourist experience. The DOT shall issue the necessary administrative issuance to implement these Guidelines.

DETAILED ARCHITECTURAL, ENGINEERING, AND ALLIED DESIGN GUIDELINES

- I. **General Considerations Including Governing Codes and Specifications.** This guideline shall be governed by and implemented in compliance with the following design manuals, codes, regulations, and specifications:
 - a. 1977 National Building Code of the Philippines (NBCP) and its latest implementing rules and regulations and amended rules and regulations
 - b. 2015 National Structural Code of the Philippines (NSCP)
 - c. Department of Public Works and Highways (DPWH) Highway Safety Design Standards Manuals: Part 1 – Road Safety Design Manual and Part 2 – Road Signs and Pavement Markings Manual
 - d. 2015 DPWH Design Guidelines, Criteria, and Standards (DGCS) and its Referral Codes (RC)
 - e. 2008 Fire Code of the Philippines
 - f. Sanitation Code of the Philippines
 - g. Revised National Plumbing Code of the Philippines
 - h. 2009 Philippine Electrical Code of the Philippines
 - i. 2000 Architectural Code of the Philippines
 - j. Batas Pambansa Bilang 344 “An Act to Enhance the Mobility of Disabled Persons by Requiring Certain Buildings, Institutions, Establishments and Public Utilities to install Facilities and Other Devices” and its IRR; as well as Republic Act No. 7277, “the Magna Carta for Disabled Persons”.

- k. Republic Act No. 1311 “An Act to Improve Land Transportation Terminals, Stations, Stops, Rest Areas and Roll-On/Roll-Off Terminals, Appropriating Funds Therefore and for Other Purposes” and its IRR.
- l. Republic Act No. 6716 “An Act Providing for the Construction of Water Wells, Rainwater Collectors, Development of Springs and Rehabilitation of Existing Water Wells in all Barangays in the Philippines.”
- m. Republic Act No. 10066, “The National Cultural Heritage Act”.

The formulation of these Guidelines also referred to the United States Highway Design Manual on Highway Rest Areas and Roadside Parking Areas. The Minimum Performance Standards and Specifications (MPSS) for Buildings report³ was also referred to for the architectural, engineering, and allied design standards and guidelines.

II. General Principles

- A. **Philippine and Local Identity.** Certain elements should be consistently used across all TRAs, to highlight the Philippine identity of the TRAs, such as, but not limited to, a standard design of a monument at the entrance of all TRAs indicating the name and location of the TRA.

However, individual TRAs should also be designed in harmony with the location’s natural and built environment. Traditional architectural styles of the region incorporate design elements that reflect the local vernacular. This will create a sense of authenticity and help the TRA seamlessly blend into the local landscape. Consider utilizing traditional building materials, roof styles, and design motifs representative of the area to enhance the TRA's connection to its surroundings.

Utilize native plants in the landscaping, choosing species that are particularly adapted to the local conditions. One may also use plants that are significant to the locality, such as the principal crop, or plant for which the place is named after.

- B. **Sustainability.** Elements of green design should be used, such as orienting the building and landscaping in a way that minimizes the building’s exposure to the afternoon sun, using cross or stack ventilation and ceiling fans, incorporating wide louvered or shaded windows to manage light and heat, and selecting insulative roofing materials will be essential, among others. Effective green design may eliminate the need for air conditioning.

Open areas, including the parking area, should have vegetation. Reducing the amount of concrete reduces the heat island effect, while shade trees reduce the buildup of heat and help keep a milder temperature around the TRA for the convenience and well-being of visitors. Utilizing stored rainwater and recycling greywater for landscape irrigation will be essential, not only to reduce overall water consumption but also to ensure that landscaping remains vibrant and the surroundings remain cool from plant transpiration even during summer months.

³ 2nd edition of the Minimum Performance Standards and Specification (MPSS) for Buildings by Arch. Armando N. Alli and was last updated on June 30, 2019



Choosing electrical appliances that minimize their consumption of electricity, and toilet fixtures that minimize water consumption, as well as utilizing renewable energy sources, are also key initiatives.

Use locally available materials in the design of facilities. Locally available materials may mean that less energy, fuel, and emissions are involved in making and transporting materials.

1. **Adaptive Reuse.** In certain cases, the adaptive reuse of existing structures into a TRA may both enhance local identity and sustainability. A heritage structure – whether a home, government office, train station, bridge, or water tank, among many others – may find a new relevance as a TRA. In choosing adaptive reuse rather than a new construction, the TRA not only benefits from the value the structure may have had as a local landmark but also minimizes the emissions and resources that would have been used with a new construction. However, consistent with RA 10066, appropriate design strategies should be adopted that not only conserve the heritage value of a structure but ensure its functionality as a TRA.

C. **Resilience.** The location and construction of a TRA should be done in a way that provides shelter both for travelers and the local community. Its open spaces can be used as an evacuation or staging area, and its facilities and amenities should be reliable even during times of crisis - its first aid provisions, storage tanks for water, and use of renewable energy may provide critical assistance.

III. TRA Classification. All TRAs shall have the basic amenities and facilities mentioned in these Guidelines. However, due to differences in traffic and geographical and road limitations, the TRAs are to be classified into three levels as follows:

A. **Level I** – Areas that have low traffic or narrow road width. The amenities are all located inside the main TRA building. The Level I TRA can only accommodate and have parking for small vehicles including bikes, motorcycles, tricycles, sedans, SUVs, vans, and the like. It may have a facility of around 50 to 100 square meters in floor area and a total lot area of 1,000 to 2,000 square meters.

B. **Level II** – Areas that have substantial traffic and space for such facilities. Most amenities are located inside the main TRA building but amenities such as café/restaurant, convenience stores, and pasalubong/souvenir shops may stand alone or separate from the main TRA building. Certain portions can also be leased by the LGUs to the private sector. The Level II TRA can accommodate vehicles included in the Level I TRA and coasters and small buses. It may have a facility of around 100 to 500 square meters in floor area and a total lot area of 2,000 to 5,000 square meters.

C. **Level III** – Areas that have high traffic and space for such facilities. Level III TRAs can have multiple café/restaurants, toilets, convenience stores, and pasalubong and souvenir shops and they can be standalone or separate from the main TRA building. The tourist information center, admin office, security office, and first aid are inside the main TRA building. Certain portions can also be leased by the LGUs to the private sector. The Level III TRA can accommodate vehicles

included in the Level II TRA buses and other big tourist vehicles. It may have a facility of at least 500 square meters in floor area and a total lot area of at least 5,000 square meters.

IV. Site Design. The siting of a TRA should involve the following considerations:

- A. **Location.** The TRA shall be located along a national road/expressway or provincial roads as defined in the DPWH Road Safety Design Manual. The TRA shall not be located near populated areas to prevent problems with nearby residents. The TRA shall also be located where there is an adequate phone signal from the major telecommunication providers, and have access to water and power connections.
- B. **Orientation.** The TRA shall be oriented to take advantage of the best site amenities such as views, slopes, and terrain. If the site is very close to transportation mainlines, the building should be located, when possible, far from the mainline to reduce noise. However, the designer should orient the building structure to allow maximum visibility from the highway, to create an inviting and more secure atmosphere for the traveling public.
- C. **Landscape.** The TRA must be designed to reflect the local area by utilizing landscaping materials and details that are native to the region. In addition, the inclusion of vegetation, particularly native trees and plants, or plants that are significant to the locality, will contribute to a welcoming atmosphere while promoting an environmentally friendly environment for TRA users.

The strategic placement of vegetation can also provide shade in the parking lot and around benches, enhancing the overall visitor experience. It is important to ensure that the TRAs offer ample open space and an adequate number of benches to prevent overcrowding and ensure the comfort of tourists.

Also, as part of the landscaping, the installation of markers and artifacts in the TRA site that display the cultural and historical resources of the area shall be considered. The use of artwork and outdoor art installations made by local artists can also be explored.

- D. **Pathways.** Pathways to and from the building and around the site should be well-lit, well-drained, and covered for protection from rain and the sun. Trellises may be used to soften the impact of the covered path, and concrete pavers should be preferred to facilitate natural drainage. Ramps and railings should be provided, following the requirements of BP 344/RA 7277.
- E. **Drainage.** The drainage shall be in accordance with the natural landforms and follow the existing slopes and drainage patterns. The use of concrete pavers (instead of poured concrete) should be preferred for parking areas and paths to allow the natural drainage of the site into the soil. Drainage canals shall also be connected to the existing road and/or urban drainage in its area.
- F. **Signages.** Signages, including entrance and advanced signings, shall be strategically placed to inform motorists about the location and distance of the TRAs. Refer to the DPWH Road Signs



and Pavement Markings Manual for the specific design and details of the signages. The TRA building must be equipped with adequate signages for rooms and facilities and have braille or tactile signages for individuals with visual impairments.

- G. Lighting.** Adequate lighting should be provided to enhance safety for pedestrians and motorists and deter undesirable activities. The lighting levels shall be designed to provide sufficient lighting, ensuring the visibility of the facility, while minimizing nighttime light pollution and glare. Lighting that uses solar and other energy-conserving mechanisms shall be used. The whole rest area, including parking lots, shall be adequately lit for nighttime use and security, with increased lighting in areas used by tourist buses. Refer to the DPWH Road Safety Design Manual for the recommended lighting levels.
- H. Parking.** Adequate parking spots should be provided for cars, motorcycles, bikes, and buses to accommodate tourists in varying modes of transport. The parking lot design must consider pedestrian movements, taking into account the access of pedestrians from the parking lot to the facility. Designated road markings and crossings can be provided as a guided pathway for the safety of pedestrians walking from the parking lot to the TRA.

Level I TRAs should have sufficient on-site parking for several cars, vans, and other small vehicles. Level II TRAs should have sufficient on-site parking for several small vehicles or a few small buses or coasters. Level III TRAs should have sufficient on-site parking for small vehicles and for several tourist buses, and provide sufficient space to allow buses and other large vehicles to maneuver without interfering with vehicular traffic and pedestrian movements.

- I. Site Furniture.** The TRA shall offer ample seating options, including benches, picnic tables, or outdoor seating arrangements, to ensure visitor comfort. These seating options should be designed to be both comfortable and durable, capable of withstanding outdoor conditions. Additionally, the TRA should provide shelters such as gazebos, pergolas, or roofed structures to shield visitors from rain or excessive sun exposure. Furthermore, considering the convenience of visitors, it may be beneficial to create a shaded pathway from the parking lot to the TRA building.

Where appropriate, the TRA building and site shall be enhanced with special design features such as decks and terraces that can serve as an extension of the building and take advantage of the site's natural features and vistas.

- J. Dumpsters.** Dumpsters shall be located away from public areas, placed in an enclosure to be resistant to animals, and accessible to garbage trucks. Separate containers must be provided for proper segregation of waste, following the Republic Act No. 9003, and the Ecological Solid Waste Management Act. Minimum design standards for the Dumpster Enclosure include:
- Using durable and weather-resistant materials that can withstand outdoor conditions and frequent use. Common materials include metal (such as steel or aluminum), concrete, or wood (treated for weather resistance).
 - Provide solid walls on all sides of the enclosure to prevent unauthorized access, conceal the dumpster(s), and minimize odors and visual impact.
 - Providing a lockable gate or door to restrict access to authorized personnel only

- Ensuring adequate ventilation to prevent the buildup of odors and gases
- Provision of proper drainage within the enclosure to prevent the accumulation of water and potential breeding grounds for pests.
- Installation of appropriate waste management features such as a concrete pad or liner, to facilitate cleaning and prevent leakage.

V. Building Design

A. Architectural Design Standards

1. Setback and Easement. The building shall have a minimum of two meters of setback⁴ to maximize natural lighting and ventilation. The building shall also have a minimum of two meters of easement⁵ to protect privacy among occupants of the building at adjacent lots.
2. Total Area. The total gross floor area (TGFA) of a typical TRA building should be adequate to accommodate the required amenities for its classification.
3. Required Amenities. The TRA shall have a spacious main lobby area, a charging station, a convenience store, a café/restaurant, pasalubong and souvenir stalls, a tourist information kiosk, and a map and tourism brochure rack. The TRA must have clean and well-maintained restrooms and a designated breastfeeding room. An administrative office, security office, and first aid station shall also be included and shall be accessible from the main lobby area. The TRAs shall also have a provision for a kitchen and/or food preparation area.

The LGU may also lease certain portions of the TRA to the private sector provided that it is in accordance with the overall theme of the area and promotes local products.

4. Windows. The windows shall be transparent, allowing ample sunlight to enter and illuminate the space naturally while offering an unobstructed view of the surroundings. The windows need to be strong and durable to withstand unpredictable weather conditions and potential vandalism. Additionally, in areas with high ceilings, incorporating operable clerestory windows can enhance air circulation through passive ventilation, further improving the overall comfort of the room and increasing the amount of natural light.
5. Doors. There shall be two separate doors for every room that is more than 65 sq. m. in total gross floor area (TGFA) to provide entry and emergency exit points. Glass Doors/Doors with fenestration shall be used for the TRA's entrance to provide a sense of openness and transparency, allowing visitors to see inside and provide a welcoming first impression.

For interior rooms, solid-core wooden doors shall be used, while fire-rated doors shall be used for emergency exits. Fiberglass-reinforced Plastic doors can be considered for

⁴ Under the National Building Code of the Philippines (NBCP), setbacks are measured from the property line to the outside face of a building, and such applies to all level spaces of the building.

⁵ Under the 1949 New Civil Code of the Philippines, easements are measured from the property line to the centerline of the exterior wall



restrooms as they are resistant to moisture, easy to clean and maintain, and can mimic the appearance of wood or other materials.

Doors with materials other than wood are subject to prior acceptance/approval by the DPWH Bureau of Research and Standards (BRS).

6. Floor. The floor shall be of a non-skid finish with a finished floor line (FFL) higher than the entrance porch by at least 25 mm. Durability, ease of maintenance, aesthetics, comfort, and safety must be considered when choosing flooring materials.

A properly labeled and conveniently located accessibility ramp shall also be provided with a maximum slope of 1:12 in compliance with BP 344/RA 7277. Wayfinding floor tiles shall also be provided for PWDs with visual impairment.

7. Ceiling. The clear height of the rooms from FFL to the finished ceiling line (FCL) shall be at least 3 m. to provide a spacious feel in the interior of the TRAs. Restroom ceilings can be lower than 3 m. provided that it still complies with the minimum requirements under the NBCP.

Acoustics, moisture resistance, and ease of maintenance must be considered when choosing ceiling materials.

8. Roofing. The roofing material shall be protected enough from rust and oxidation, salt air, acid rain, extreme weather events, and other sources of corrosion and leaks. The roof design shall not be gutter-less to prevent damage to the soil or foundation of the TRAs.
9. Partitions. All interior partitions shall be of drywall construction and must be erected from the top of the lower structural floor slab to the soffit of the upper structural floor slab.
10. Painting. Where applicable, metal, wood, and plastic components of the TRA shall be coated with off-white enamel paint. Wall components shall be coated with off-white latex paint. The ceiling shall be coated with flat white latex paint. All the paint/coloring materials shall maintain their quality for at least five years.

Paint and color schemes that are consistent with the branding of the locality may also be considered. However, it's generally advisable to avoid choosing overly bold or vibrant colors that may be visually overwhelming or will clash with the desired ambiance and local surroundings. To promote a relaxing and inviting atmosphere, consider the following color options:

- Soft Neutrals (e.g. Whites, creams, light grays, and beige tones)
- Pastel Shades
- Earth and Natural Tones
- Subtle Accent Colors – Incorporate through accessories or small elements in the TRA (Add visual interest without overwhelming the space)

11. **Restroom.** The restrooms shall be accessible from the main lobby area. The TRAs shall have separate restrooms for male, female, and senior citizens and persons with disabilities (PWDs). In accordance with the Republic Act 11311, the restroom facilities shall also have adequate lighting and ventilation, a safe, adequate, and running water supply, a flush system, a toilet seat with cover, toilet paper, mirror, soap, hand dryer and door lock, waste bin, and an exclusive space for diaper-changing.

B. Structural Design Standards

1. **General Structural Design.** The structural design shall be in accordance with the 2004 revised Implementing Rules and Regulations (IRR) of the NBCP and the latest edition of the National Structural Code of the Philippines (NSCP).
2. **Wind Load.** The roofing and walls shall withstand the varying extreme conditions in the Philippines and be designed against a minimum wind speed of 250 kph.
3. **Seismic Load.** A seismic importance factor of 1.00 shall be used. The TRA buildings shall be designed using a seismic zone factor of 0.40. For TRA buildings that will be built in Palawan, Sulu, and Tawi-Tawi, a building design using a seismic zone factor of 0.20 may be used.
4. **Live Load.** The building shall be designed with a minimum of 1.9 kPa of live load.
5. **Design Life.** The TRA building shall be designed with a minimum design life of 25 years.

- C. Fire Protection.** The TRA shall be in accordance with the 2008 Fire Code of the Philippines (FCP) and its latest Implementing Rules and Regulations⁶. The TRA shall also secure a fire safety permit from the LGU and the local Bureau of Fire Protection (BFP).

VI. Furniture and Movable Items

- A. **General.** All sets of furniture and movable items must follow the overall theme of the TRAs and must be consistent with the branding of the locality. They must also be in harmony with the institutional character of the TRA.
- B. **Benches.** Adequate and comfortable benches shall be provided inside the TRA to provide tourists with an area to rest.
- C. **Pasalubong and Souvenir Stall.** Pasalubong and souvenir stalls shall be provided showcasing local delicacies, crats, and products. MSMEs, especially those that have undergone training and accreditation with the DOT and the Department of Trade and Industry, should be supported and preferred.

⁶ As of May 24, 2023, the latest implementing rules and regulations were developed in 2019



- D. **Map and Tourism Brochure Rack.** All TRAs shall have a wall-mounted map of the area and the location of the tourist sites. A tourism brochure rack shall also be provided with information about tourism attractions, activities, and accommodations.
- E. **Others.** Live plants, local artworks, automatic teller machines (ATMs), and other movable items may be installed provided that it enhances the convenience of the tourist, and follows the overall theme of the TRAs.

VII. Utilities

- A. **Water Supply.** The TRA shall be connected to the local water district distribution infrastructure to supply potable and adequate water. Where wells are used, a filtration system and a durable hydro-pneumatic pressure tank shall be installed to ensure a potable and adequate supply of water. Water may be stored, not only to ensure continuous service even during momentary disruptions, but also for resilience during times of crisis.
- B. **Drainage System.** In full compliance with R.A. No. 6716 “An Act Providing for the Construction of Water Wells, Rainwater Collectors, Development of Springs and Rehabilitation of Existing Water Wells in all Barangays in the Philippines”, TRA building design shall integrate and provide for the future installation of the rainwater collection system. Rainwater collection is intended primarily for landscape irrigation use only.
- C. **Wastewater System.** Plans and specifications must satisfy the sanitary requirements of the LGU where the TRA is located and shall secure the LGU sanitary permit. The plans and specifications shall also follow the principles of the National Plumbing Code of the Philippines. Graywater may be collected and reused solely for landscape irrigation.

A septic vault shall also be installed and protected from corrosion by coating with a bituminous coat or by any other acceptable means as provided by the DPWH before effluent from this septic tank is safely discharged into the nearest waterway or drainage line.

- D. **Electrical System.** The electrical controls and breakers shall be hidden and not accessible to the public to minimize accidents. The design must incorporate an adequate number of circuits to facilitate individual room controls. An emergency generator capable of providing lighting should be provided to ensure continuous public use during power outages. The use of solar lamps for night lighting shall be used. The use of off-grid, solar energy, and other clean and efficient energy mechanisms shall also be explored to ensure a steady supply of electricity in the TRA.
- E. **Data and Telecommunication Systems.** Wi-Fi access, with an adequate speed level and bandwidth allocation, shall be present in the TRAs to provide tourists with their telecommunication needs. TRAs may be utilized by telecommunications providers for the installation of towers.

- VIII. **Operation and Maintenance.** The LGU shall be responsible for the upkeep and maintenance of the TRA. Periodic assessment and monitoring of the rest areas shall be done by the regional offices of

the DOT. The LGU shall also conduct regular inspections of the structural, exterior, and interior components including, but not limited to, the following:

- Beams
- Columns
- Slabs and Walls
- Roof
- Foundation
- Site Development Works
- Painting jobs
- Restroom cleanliness
- Organic termite control of the structure
- Plumbing fixtures

The LGU shall also be responsible for identifying any structural defects and other issues in the TRA and shall report their findings to the regional DOT.



POLICY DEVELOPMENT : PROPOSED AMENDMENTS TO THE TOURISM ACT OF 2009

INTRODUCTION

The institutional reforms outlined below relate to the Goals and Objectives of the NTDP that focus on the institutional arrangements of the DOT in relation to RA 9593 and its IRR, its attached agencies, and other government agencies.

These proposed reforms are intended to (a) reconcile or clarify points of conflict or vagueness in the Tourism Act or its IRR, (b) address problems that arose in the course of its implementation, and (c) reframe the policy direction of the Tourism Act with new laws that have been passed in the last 12 years. These reforms also proceed from a recognition of fundamental changes in circumstances – the massive growth of tourism over the last two decades, the impact of the pandemic and the crucial role tourism will play in economic recovery, the heightened importance of competitiveness, resilience, and sustainability, among others – from when the Tourism Act became law.

Where applicable, both executive and legislative actions are identified. While legislative action could potentially provide the greatest scope and extent of needed reforms, legislation often takes time and is subject to the priorities and preferences of Congress. On the other hand, executive action may provide faster solutions, involving negotiations with fewer parties, but may not provide the full extent of reform needed. Ideally, even when both executive and legislative options are oriented toward similar goals, they should both be pursued along parallel paths to ensure that some goals may be achieved.

Crucially, we note that DOT has not fully utilized its rule-making powers in defining and implementing its policies despite its broad authorization to do so under the Tourism Act. It is our view that many of the issues can be addressed by more assertive executive action.

Also, as the amendment of the Tourism Act may take too much time to result in gains in the short to medium term, proposing new measures through the General Appropriations Act can be a way of achieving targeted reforms, especially in terms of the use and allocation of government funds for specific initiatives.

1. Institutionalizing the Tourism Coordinating Council and convergence mechanisms

Executive Actions:

- **Executive Order for convergence for the Tourism Coordinating Council (TCC).** At the Presidential level, the preparation and issuance of an executive order providing for the implementing mechanisms of the TCC, primarily through the establishment of permanent working groups between key agencies, the assignment of personnel, the provision of funding, and the prioritization and coordination of programs, including the regular reporting of data and

PPA implementation [See also #3, “Providing mechanisms for advocacy, convergence, and monitoring”]

- **Joint administrative orders with relevant agencies with convergence programs.** Alternatively, at the inter-agency level, the preparation and issuance of joint administrative orders between the department and the relevant agency or agencies, organized according to specific areas of convergence (transportation infrastructure, nature, and tourism, culture, and tourism, etc.) providing for the establishment of permanent working groups, the assignment of personnel, provision of funding, and the prioritization and coordination of programs.

Legislative Actions:

- **Legislating the institutionalization of convergence through the Tourism Coordinating Council.** The preparation of a bill and securing its approval as an amendment to RA 9593, providing for the implementing mechanisms of the TCC, primarily through the establishment of permanent working groups between key agencies, the assignment of personnel, the provision of funding, and the prioritization and coordination of programs. Greater effectiveness and efficiency may be achieved by integrating the TCC framework into NEDA’s various councils and committees, with NEDA and DOT as co-chairs of the TCC.
- **Establishing certain programs to be implemented by the DOT or its attached agencies.** Specific tourism-oriented programs, when implemented by another agency, may not be implemented effectively, especially for other developmental goals that are critical for tourism but may not be adequately prioritized by other agencies. For instance, even as many tourism roads have been built in the last decade, some road projects have threatened heritage structures or encroached on necessary buffer zones for sensitive environmental areas.

2. Streamlining and rationalizing the functions of the Department and its attached agencies

Executive Actions:

- **Promotions functions and responsibilities.** Amendment of the IRR of RA 9593 to clarify and reconcile seemingly conflicting provisions with promotions, specifically that DOT retains the responsibility for strategic planning and research for promotions, while the TPB is responsible for the implementation of the strategic promotions plan, including MICE and other strategic programs.
- **Maximizing resources for performance.** A joint administrative order between DOT, TPB, and TIEZA providing for specific merit-based or competition-based criteria under which LGUs may access funds for promotions and infrastructure, such as the regularity and comprehensiveness of reporting of data, the extent to which the private sector has obtained accreditation, whether the tourism office has been institutionalized, whether there is an approved local tourism plan and whether the program for which funding is sought is part of the local tourism plan. The DOT can also develop a “Seal of Responsible Tourism Governance” on these metrics, which would facilitate the availment by LGUs of resources from the DOT and its attached agencies.
- **Providing incentives for tourism development.** Seeking and obtaining inclusion in the Investment Priorities Plan of clear and appropriate incentives for TEZ development, as well as for the development and upgrading of tourism facilities, and the importation of tourism equipment and supplies, underscoring the economic impact of tourism development, and the need to encourage investment within a sustainable framework.



- **The role of foreign offices.** By executive action, the Secretary may define and orient the responsibilities of foreign offices towards market research and development, aligning its functions toward OTDPRIM and OPD. A framework to guide the operations of foreign offices in these functions should be established.

Legislative Actions:

- **Amendments to charters.** The mandates and powers of the DOT, TPB, and TIEZA will be redefined to:
 - Provide direct regulatory power and authority of DOT over tourism destinations, local governments, and tourism enterprises, especially about competitiveness, resilience, and sustainability requirements. [see also #3 “Providing a framework for destination management”]
 - Establish TPB’s primacy for promotions, but following the strategic planning responsibility of the DOT, while clarifying and securing the necessary funding (concerning travel taxes, PAGCOR, airport authorities, among others), mandates, and benchmarks (with GCG and DBM). [see also #4 below, on “Agreeing on transparency and procedures”]
 - Provide new parameters for the operation of TIEZA within the CREATE framework that properly focuses on the need to provide incentives to subsidize sustainable tourism development.
- **Merger of tourism park agencies.** Provide a single charter for Nayong Pilipino and National Parks Development Committee (and possibly also the Intramuros Administration), focusing on their roles in the conservation of both intangible and tangible heritage, of green and public spaces for leisure, recreation, and for community benefit.
- **Expanding the PRA into an agency for long-staying tourists.** The PRA’s functions may be expanded to manage existing and new visa categories (retirement, education, and digital nomads), more effectively promote these products, and provide broader and wider support in facilitating tourism experiences for long-staying tourists.

3. Providing and enhancing mechanisms for the integration, coordination, and implementation of national and local programs

Executive Actions:

- **Providing mechanisms for advocacy, convergence, and monitoring.** Through an administrative order under the Secretary’s general powers to organize offices, a secretariat should be established to support the DOT’s MANCOM, particularly with the need for stronger data gathering and monitoring for programs, effective advocacy, and convergence, involving working teams from the DOT’s various offices (particularly OTDPRIM, OTC, OSC) to ensure the continuous and progressive implementation and real-time monitoring of key programs at national, cluster, and local levels.
- **Establishing a framework for the hierarchy of tourism planning, management, and reporting.** Through an administrative order, the DOT formalizes the requirements of a cluster, TDA, LGU, and site-level planning, management, and data gathering and reporting, consistent with the NTDP.

- **Strengthening regional offices.** Advocating with the DBM according to this and prior NTDPs to provide a larger and stronger complement of regional office manpower to correlate with the regional offices’ responsibilities over clusters and TDAs, to monitor, supervise, and assist LGUs in tourism development and planning more effectively. A framework to guide regional offices in these functions should be established.
- **Building institutions for local tourism.** Through an administrative order, about #2 “Maximizing resources for performance,” the DOT can outline criteria and programs to incentivize the progressive development of LGU tourism institutions. Furthermore:
 - By amending the IRR of 9593 in relation to the requirement of appointing tourism officers under RA 9593, section 42, the DOT should define when tourism is a “significant industry”, either by providing specific indicators (such as number or impact of arrivals, presence of tourism infrastructure, desire for DOT assistance) or, by administrative order or proclamation, simply identifying and declaring particular existing and upcoming destinations as meeting the requirement of “a significant tourism industry”.
 - Further to RA 9593, section 42, developing and establishing a formal curriculum for tourism officers, to ensure the existence of fundamental skills and knowledge and to provide a mechanism for continuous professional development.

Legislative Action:

- **Providing a framework for destination management.** Legislation should be adopted that provides a comprehensive framework for destination management involving mechanisms from the national to local levels, including the actions identified above, on “mechanisms for advocacy, convergence, and monitoring”, “hierarchy of tourism planning”, “regional offices”, and “building institutions for local tourism”, including:
 - Establishing an institute for the development of tourism officers under the DOT
 - The measures under #2 “Maximizing resources for performance”
 - The measures under #2 “Amendments to charters” for the DOT to tourism destinations, local governments, and tourism enterprises, include the provision of administrative or quasi-judicial mechanisms and penalties.

4. Rationalizing and providing funding sources for tourism

Executive Action:

- **Agreeing on transparency and procedures.** Executing appropriate agreements or memoranda with relevant agencies obliged under RA 9593 to remit funds to TPB (with relevant guidance from DBM and the Treasury) on the process and regularity of remittance and of computing the appropriate amounts.

Legislative Actions:

- **Rationalizing travel taxes.** Amending RA 9593 and other laws, travel taxes must embody proper tax policy by relating the object being taxed with the public benefit sought.
 - The travel tax, as a tax on outbound travel, should no longer support CHED’s operations. As a matter of more effective and rational tax policy, CHED can and should be more effectively supported by general appropriations. The travel tax should then be oriented toward tourism development, primarily toward promotions and product development activities



(including support for the NCCA, DOT, TPB, and TIEZA). These activities should be the primary focus of the fund, encouraging tourists to come to the country, to offset the revenue loss caused by an outbound traveler.

- The travel tax can be reduced to a single flat fee without exemptions. This would significantly cut down the administrative cost of the fund, facilitating the tax's integration into airport or ticketing fees, and allowing the fund to be used more efficiently for tourism promotions and product development.
- **Establishing an inbound tax.** As inbound travelers generate additional impacts on our environment, communities, and infrastructure, a flat fee must also be collected upon arrival to support activities for sustainability, and for building a fund for industry recovery and resilience. This tax should be managed by the DOT, clarifying, focusing, and defining the mandate of the OTRG.
- **Providing a framework for local fees.** To ensure that local fees collected by LGUs (such as environmental user fees, among others) are properly utilized for specific conservation activities, instead of being remitted to an LGU's general funds.

5. Increasing stakeholder of the private sector

Executive Actions:

- **Integrating accreditation with local regulation.** As part of the strategy to broaden coverage and regulation of the private sector, a framework must be established with the DILG and local government leagues in a joint administrative order that includes all tourism enterprises in the coverage of the accreditation system, with the agreement of local governments to honor the accreditation system as a condition for operations, on the premise that DOT's recognition and support is necessary to upgrade the quality of services through training, ensure compliance with health, sanitation, and safety standards in the wake of the pandemic, and ensure support for enterprises in the event of future crises, consistent with RA 9593, section 40.
- **Mandating membership in the Tourism Congress.** Amending the IRR of RA 9593 to require membership in the Tourism Congress as a condition for accreditation/renewal and defining the Tourism Congress' role as an effective private sector partner by assisting in programs for training, and accreditation, among others. Associate (non-voting) memberships may be established for NGOs/CSOs, HEIs, and local tourism councils. A Tourism Congress supported even by minimal levels of membership dues from all accredited tourism enterprises can assist or implement many of the programs that DOT currently carries out – industry research, coordinating events with stakeholders and promoting accreditation, to name a few initiatives – freeing up DOT's funds for other programs.

Legislative Action:

- As part of the strategy to broaden coverage and regulation of the private sector, legislation shall mandate all tourism enterprises in the coverage of the accreditation system, with the agreement of local governments to honor the accreditation system as a condition for operations, on the premise that DOT's recognition and support is necessary to upgrade the quality of services through training, ensure compliance with health, sanitation, and safety standards in the wake of the pandemic, and ensure support for enterprises in the event of future crises.

COMPARATIVE MATRIX OF TOURISM INDICATORS BETWEEN TARGETS AND ACTUAL (2019 – 2022), AS OF 29 AUGUST 2023

Indicators	2019			2020			2021			2022		
	Targets	Actual	% Change									
Revenue (Php Billion)	2,888	3,744	29.6%	3,186	697	-78.1%	667	810	21.4%	1,146	1,873	63.4%
Inbound	564	600	6.39%	661	133	-79.9%	12	28	133.3%	34	369	985.3%
Domestic	2,324	3,144	35.3%	2,525	564	-77.7%	655	783	19.5%	1,112	1,505	35.3%
Tourism Gross Value – Added (Php Billion)	1,588	2,509	58%	1,912	917	-52.0%	822	1,005	22.3%	1,044	1,376	31.8%
Share to Gross Domestic Product (GDP) 1%	8.6	12.9	50%	9.5	5.1	-46.3%	5.0	5.2	4.0%	5.2	6.2	18.5%
Employment												
Tourism Employment (Million)	5.8	5.7	-1.7%	6.0	4.7	-21.7%	4.5	4.9	8.9%	4.8	5.4	12.5%
Share to Total Employment (%)	13.6	13.6	0%	13.8	11.9	-13.8%	10.9	11.1	2.3%	11.1	11.4	3.2%
Visitors												
Inbound Tourism (Millions)	8.2	8.3	1.2%	9.2	1.5	-83.7%	0.25	0.16	-36.0%	1.72	2.65	54.1%
Domestic Trips (Millions)	79.3	122.1	54.4%	82.5	27.0	-67.3%	22.5	37.3	65.8%	38.2	103.0	169.6%

