
CHALLENGING GROWTH OF TOURISM

Airport Policy Brief
Joint Foreign Chamber of Commerce



Presented by Aileen Clemente
February 21, 2017

Proprietary and confidential

Challenges

**Tourism
Milestones**

**Tourism
Equation**

**Tourism
Definition**

**Tourism
Framework**



Tourism Definition

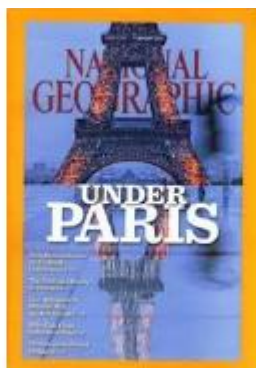
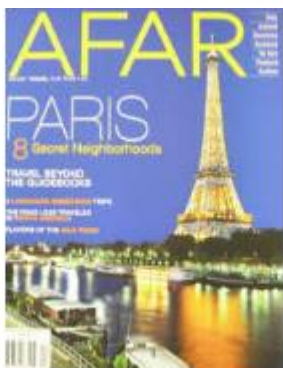
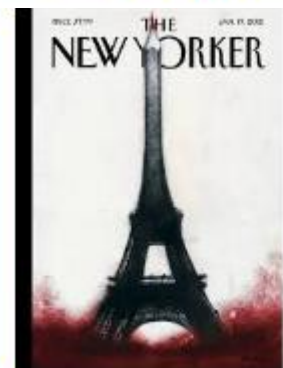
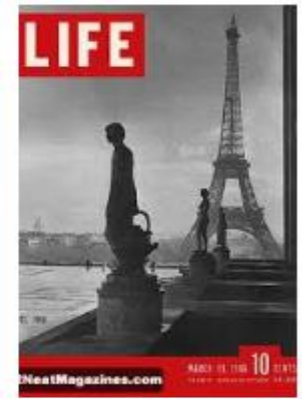
IMPLICATION OF INTENDED IMPACT

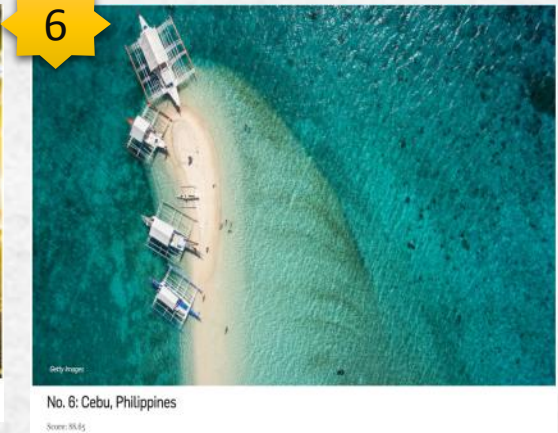
**6.91 million
people
ascended in
2015**

**25,000 people
ascend the tower
every day**

**USD6.4M or PHP319.8B
in ticket sales alone**

ONE Landmark Extensive Media Coverage





Palawan

Boracay

Cebu



Travel + Leisure

WEBSITE STATISTICS

Monthly Page Views: 56 Million

Unique Visitors: 4.2 Million (ComScore)

MAGAZINE STATISTICS

Reach: 6Million readers

Subscriptions: 933,891





NATURAL RESOURCES



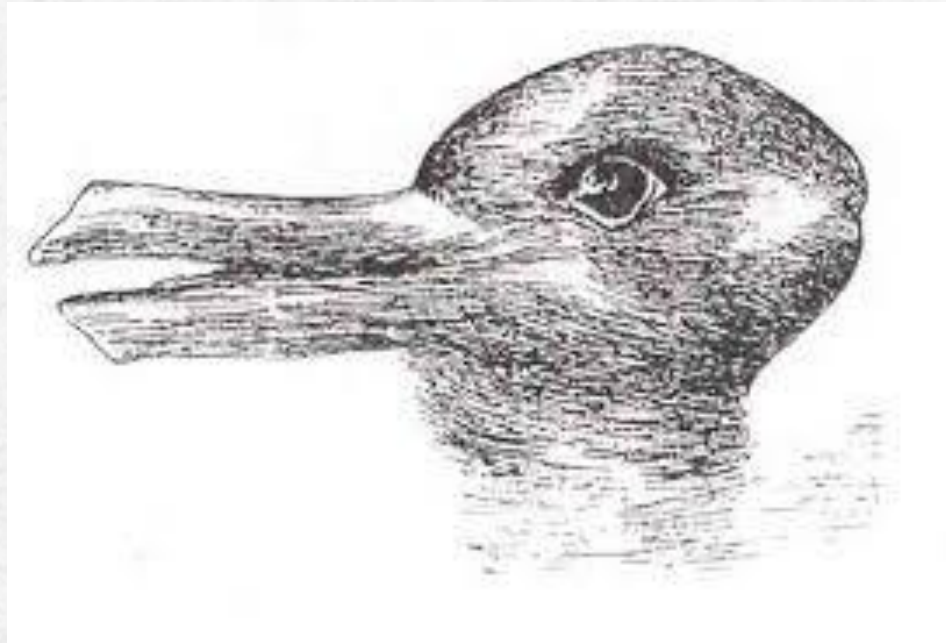
HISTORICAL HERITAGE



OTHER RESOURCES



CULTURAL RESOURCES



Tourism Equation

TRAVEL TECHNOLOGY



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BOOK A TRIP

Flight

Origin

Destination

Round Trip One Way

▶ [Multi-City?](#)

Departure

29 Oct 2016 Anytime

Return

29 Oct 2016 Anytime

Adult (12 above) Children (2-11 y/o) Infant (0-23 mos)

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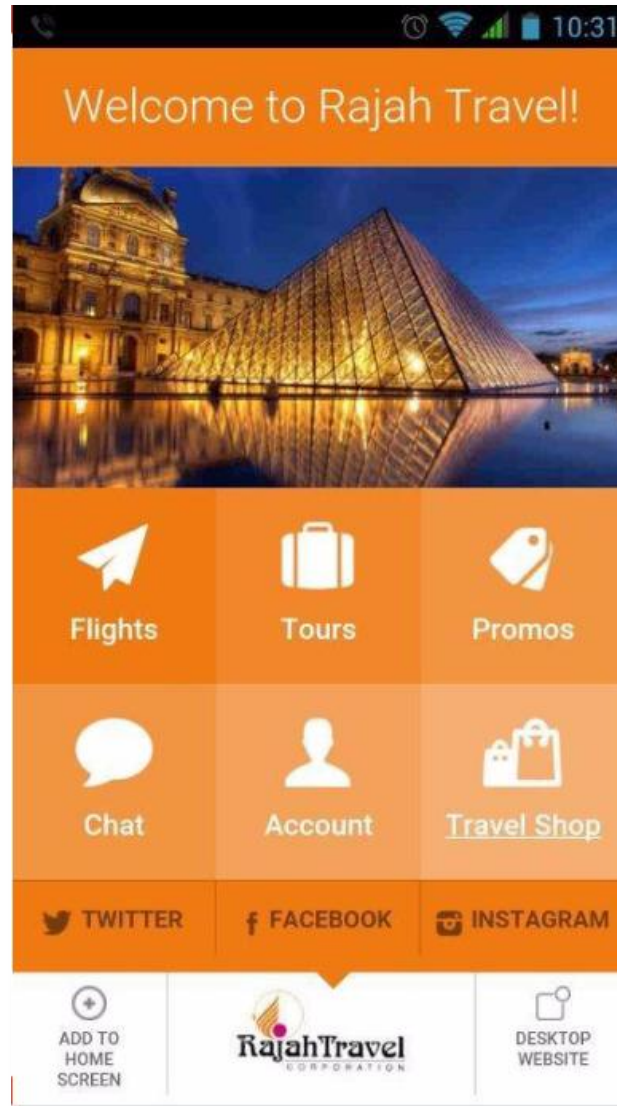
Life as you Imagine

[View / Print Itinerary](#)

[Travel Shop](#)

Rajah Travel's Online Booking System

TRAVEL TECHNOLOGY



Rajah Mobile Booking

SHARING ECONOMY AND TOURISM

GETTING AROUND



UBER

Sidecar
a whole new way to get around

zimride



WHERE TO STAY



onefinestay



WHAT TO EAT

KITCHENSURFING



EatWith



Cookisto

Cookening

WHAT TO DO



Vayable

sidetour
incrediblue

Get
Your
Guide



BOATBOUND



GetMyBoat

dopios

DEMAND: TRANSFORMING HOW WE CAN TRAVEL



RACHEL BOTSMAN 2014

Sharing Economy

Wearable Translator

The world's first wearable translator—breaking the language barrier and making communication happen.



Simple and Easy.
Push and Talk!

Wearable translator



Generation Z (15-20)

- Travel is an essential
- Experience over product
- Savvy consumers who know how to research
- Always looking for better deals



Millennials (21-34)

- Most populous generation
- Love customized and unique experiences
- With limited time
- Price-sensitive
- Get travel ideas from social media
- Like to stay connected always
- DIY travelers



Generation X (35-49)

- Family life shapes travel preferences
- Destinations are closer to home
- Want time to relax and unwind
- Spends the most each day while traveling
- Often travel with parents or kids



Boomers (50-64)

- Transitioning to retirement
- More time and money to travel
- Diverse travel plans



Silent Generation (65+)

- Prefer cruise vacations
- Enjoy reading about travel
- Most loyal to their travel advisors



Personalization



On-Demand Access



The Crowd vs. The Experts



4.98 Million Jobs in 2015

VS.

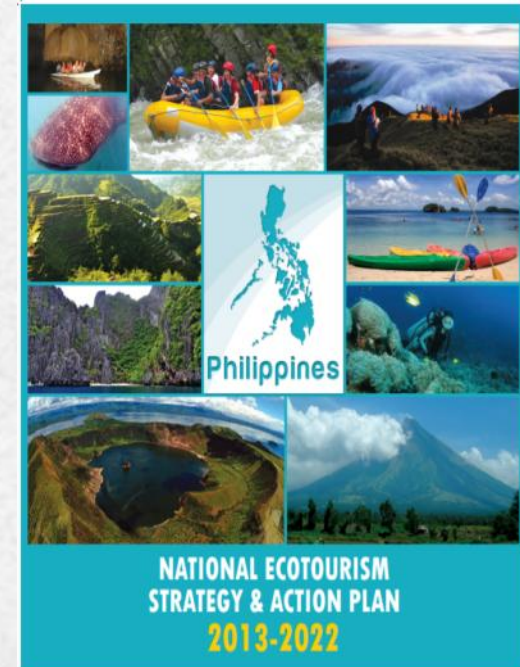
5.3M International Visitors

Ratio of Tour Guide and Visitors, 2013

Number	Language	Visitors	Ratio
105	Japanese	433,705	1: 4,131
37	Mandarin & Fukien	565,451	1: 22,618
30	Korean	1,165,789	1: 38,860
11	Cantonese	133,652	1: 12,150
11	Spanish	17,126	1: 1,557
6	French	39,042	1: 6,507
5	German	70,959	1: 14,192
2	Arabic	68,916	1: 34,458
2	Russian	41,254	1: 20,627
2	Italian	17,668	1: 8,834
1	Thai	47,874	1: 47,874

Travel & Tourism's Total Contribution to Employment

	2015 '000 jobs
1 China	65096.8
4 Indonesia	10284.0
7 Vietnam	6035.5
8 Thailand	5869.7
Asia Pacific Average	4768.3
12 Philippines	4003.8
21 Cambodia	2303.7
World Average	2123.0
26 Malaysia	1575.8
29 Australia	1482.7
44 Sri Lanka	798.1
85 Singapore	310.3



"Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities"

"The Philippines as a globally competitive ecotourism destination with its wealth of natural beauty and cultural richness, conscious of the need to conserve, enhance, sustain and develop these assets and ensure equitable sharing of benefits among its people."

PH Tourism Budget

P3.6 B / \$72M in 2016

P2.5 B / \$50M in 2017



China	\$292B
S.Korea	\$ 25B
Malaysia	\$901M
Indonesia	\$263M



KEY AREAS OF FOCUS



Ecotourism



Biodiversity
Conservation



Agri-Tourism



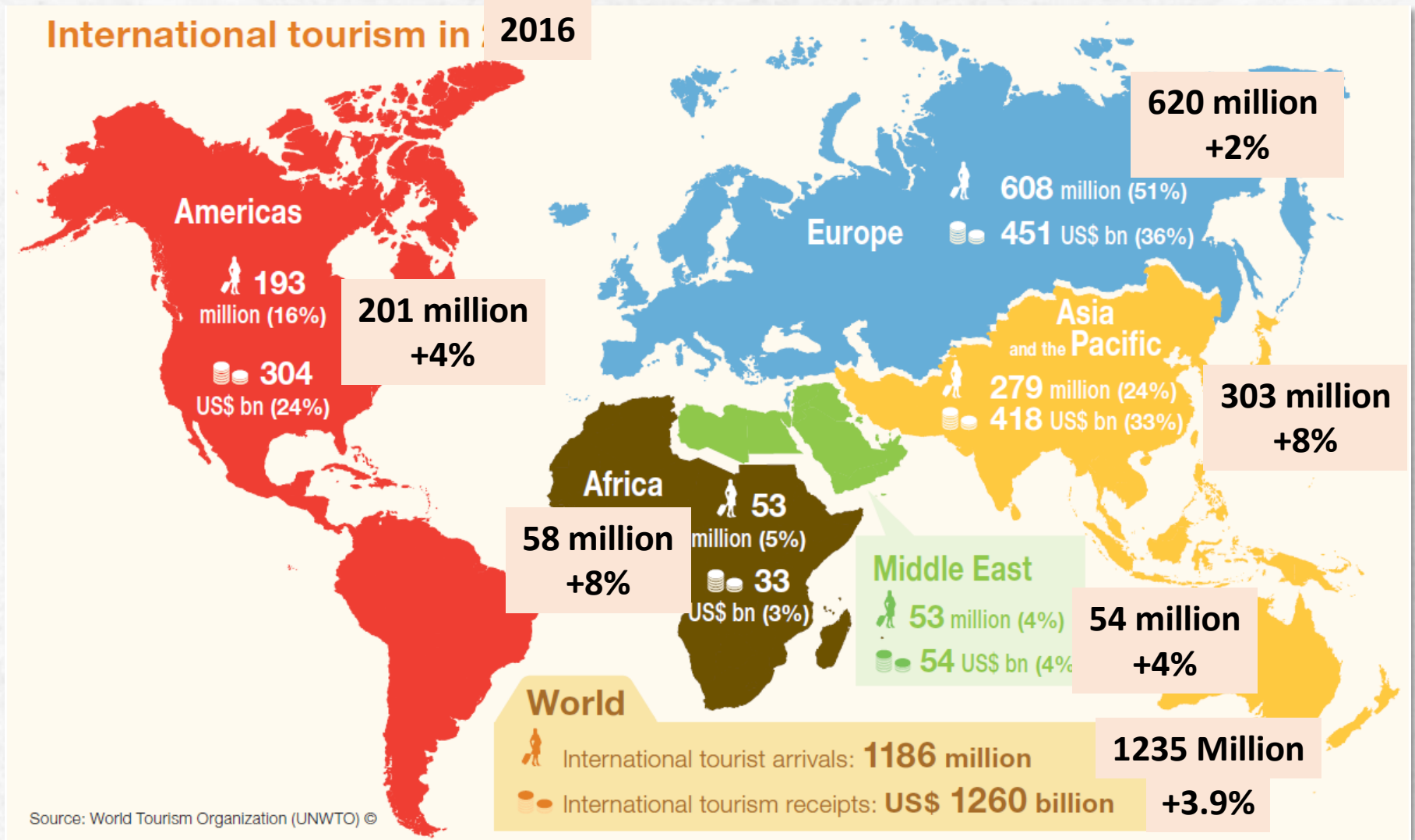
Heritage
Tourism



Arts & Crafts

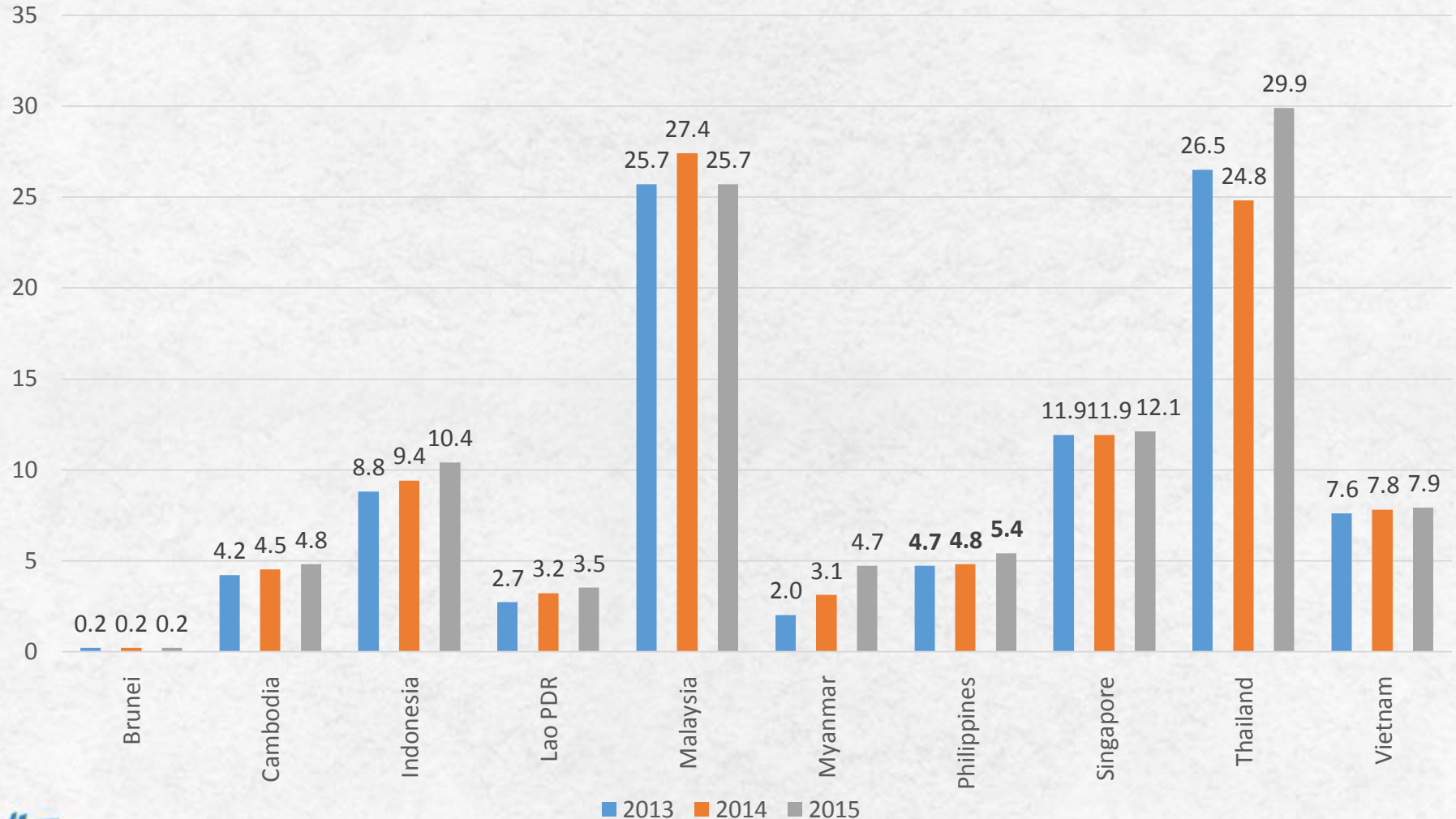


Tourism Milestones



2015 Key Tourism Figures

TOURIST ARRIVALS TO THE ASEAN



METRIC	TARGET	ACTUAL	
International Tourist Arrivals	10 Million	5.3 Million	
Domestic Tourists	35.5 Million	70.5 Million	★
Tourism Direct GVA	PHP 893 Billion	PHP 1,093, Billion (2015)	★
% Share to GDP	6.82	8.2 (2015)	★
Tourism Employment	6.5 Million	4,982,000 (2015)	
% of National Employment	16%	12.7% (2015)	

PH TOURISM INDUSTRY PERFORMANCE

FULL YEAR 2015



5,360,682

Visitor Arrivals



P 227.62 billion

International receipts

FULL YEAR 2016



5,967,005

Visitor Arrivals



P 230.13 billion

International receipts



PH TOURISM INDUSTRY PERFORMANCE

FULL YEAR 2015



P 5,513.67

Average daily expenditure



8.66 nights

Average length of stay

JAN to NOV 2016



P 4,402.81 ↓

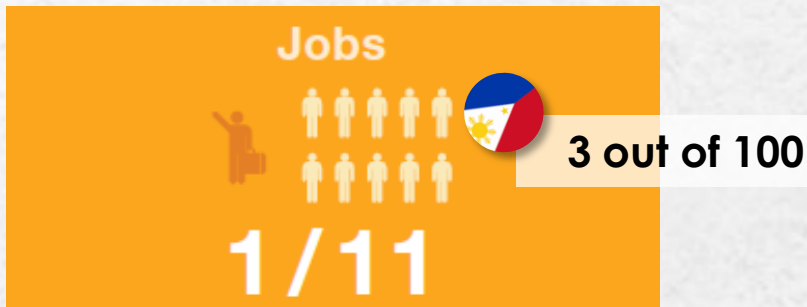
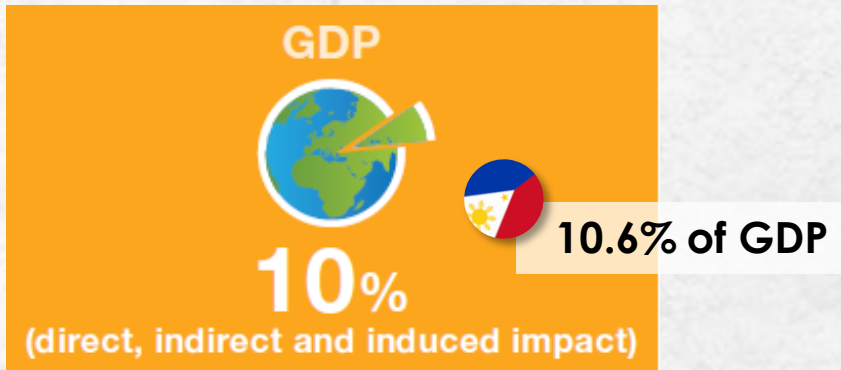
Average daily expenditure



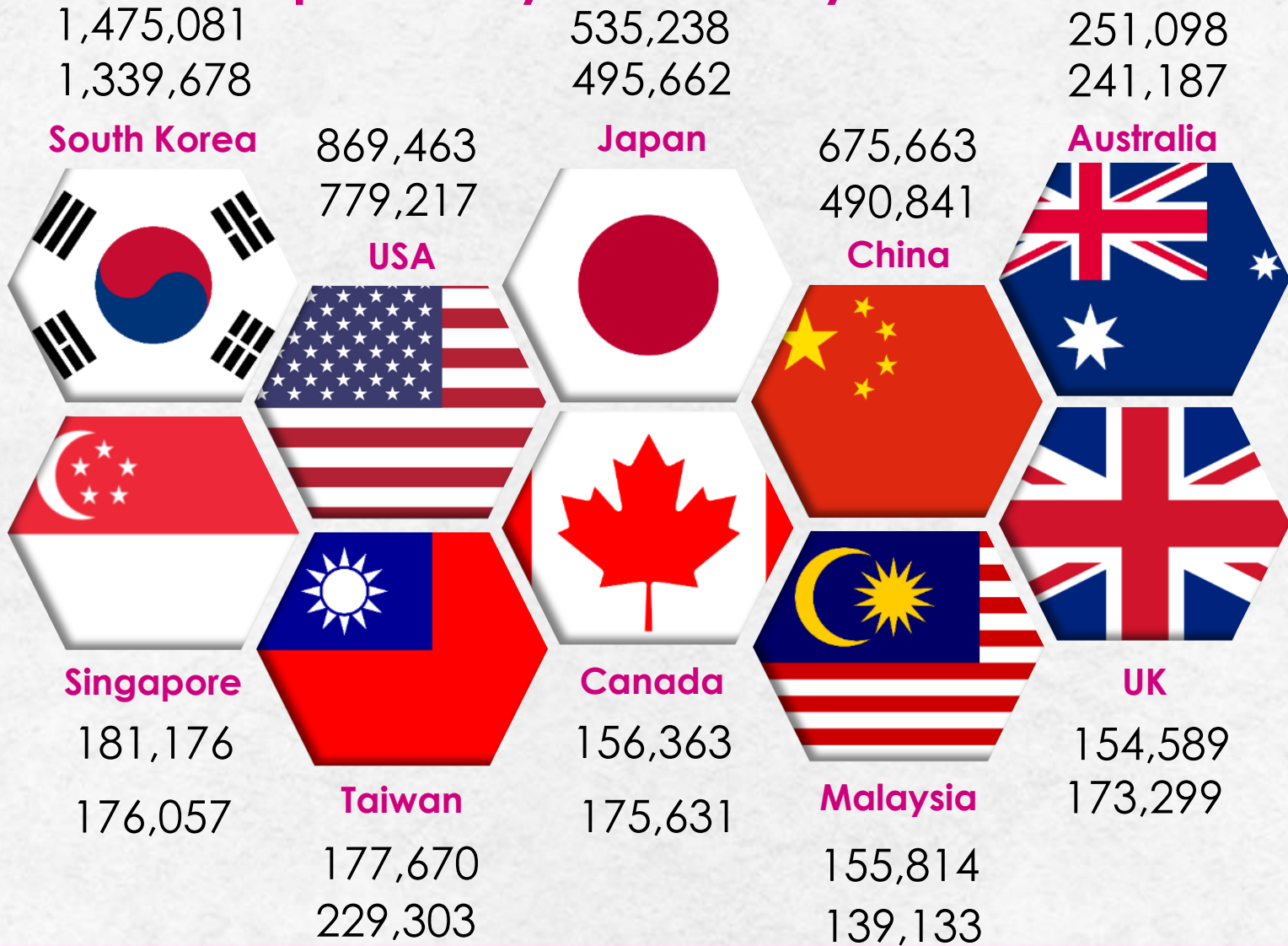
8.68 nights ↑

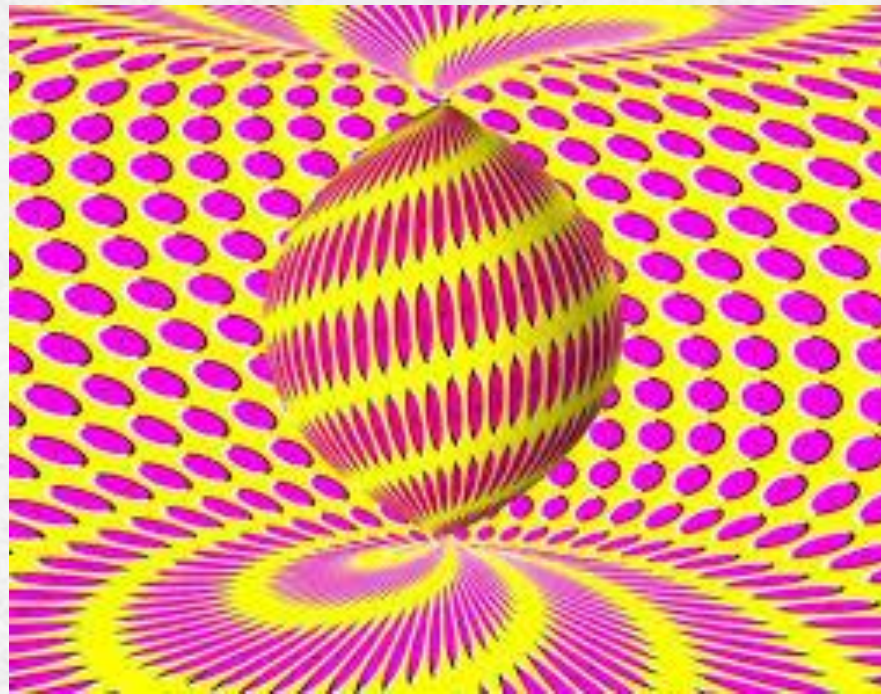
Average length of stay

2015 Key Tourism Figures



Top Country Markets by Volume





Tourism Framework

TOURISM INFRASTRUCTURE



DRAFT PHILIPPINE DEVELOPMENT PLAN

NDP 2011 – 2016	PDP 2017-2022
	Overview of Prospects & Other Developments that could affect Philippines Socioeconomic & Institutional Development
	Overlay of Economic Growth Demographic Trends & Physical Characteristics
	PDP 2017-2022 Framework
Inclusive Growth	Reducing Inequalities in Opportunities for Human Development (Pagbabago) Maximize the Demographic Dividend (Kaunlaran)
Macroeconomic Policy	Sound Macroeconomic Policy National Competition Policy
Competitive Industry & Services Sector	Expanding Economic Opportunities in Industry (Pagbabago) Expanding Economic Opportunities in Services (Pagbabago)
Competitive Agriculture & Fisheries Sector	Expanding Economic Opportunities in Agriculture, Forestry & Fisheries (Pagbabago)

NDP 2011 – 2016	PDP 2017-2022
Accelerating Infrastructure Development	Promote Technology & Innovation (Kaunlaran) Infrastructure Development
Towards a Resilient & Inclusive Financial Sector	
Good Governance & the Rule of Law	Swift & Fair Administration of Justice (Malasakit)
Social Development	Citizen Centered, Clean & Efficient Delivery of Public Goods & Services (Malasakit) Promoting Philippine Culture & Values (Malasakit) Building Resiliency of Individuals & Families (Pagbabago)
Peace & Security	Peace & Development Security & Public Order
Conservation, Protection & Rehabilitation of the Environment & Natural Resources	Ensure Ecological Integrity, Clean & Healthy Environment



471 Thousand Arrivals for Business Travel & MICE



90,000 sqm MICE Space



3 Million Arrivals for Business Travel & MICE



340,000 sqm MICE Space



US\$ 2.58 Billion Economic Impact

THANK YOU

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