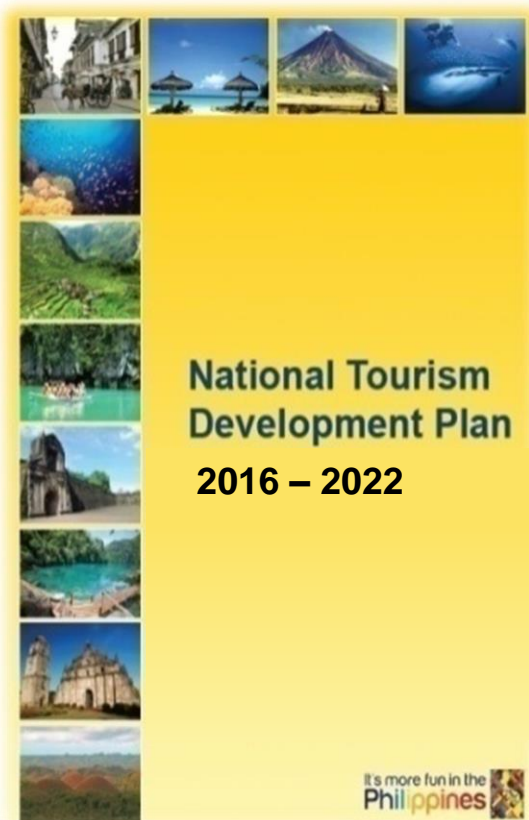

National Tourism Development Plan 2016-2022



Linking **Planning** and **Budgeting** Towards an Effective Public Financial Management

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2016 Tourism Performance



8.6% of GDP
Php 1.24 T GVA
12.3% annual growth



Tourism Revenue
Php 2.42 Trillion
20% annum growth



Inbound Tourism
Php 313 Billion
8% of Exports

Domestic Tourism
Php 2.1 Trillion
19.8% of Household consumption



Inbound Visitors
5.97 Million
9% annual growth

Domestic Travellers
79.3 Million
16% annual growth



5.22 Million Employed
12.8% of Total Employment
4% annual growth

HOTEL WORKERS
RISING!
Lifting our workers above the noise of life

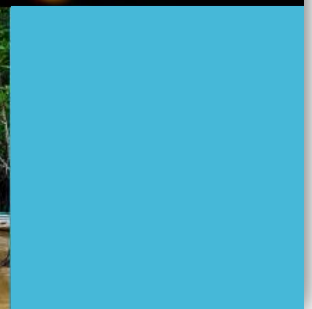
1.8 Million
33.6% of Tourism workforce

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REPUBLIC ACT No. 9593
otherwise known as
Tourism Act of 2009
and

**Its Implementing
Rules and Regulations**



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National Tourism Development Plan Formulation Process

Department Order No. 2015-23

- Focus Disc
- Site As
- Key In
- 2nd S
- Con

Tourism Coordinating Council (TCC) Meeting



- Terms of Reference
- 1st Steering Committee

Tourism Commit
Pres to
Assns

NWTO Advisory Mission

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Consulted Stakeholders

Focused Group Discussions

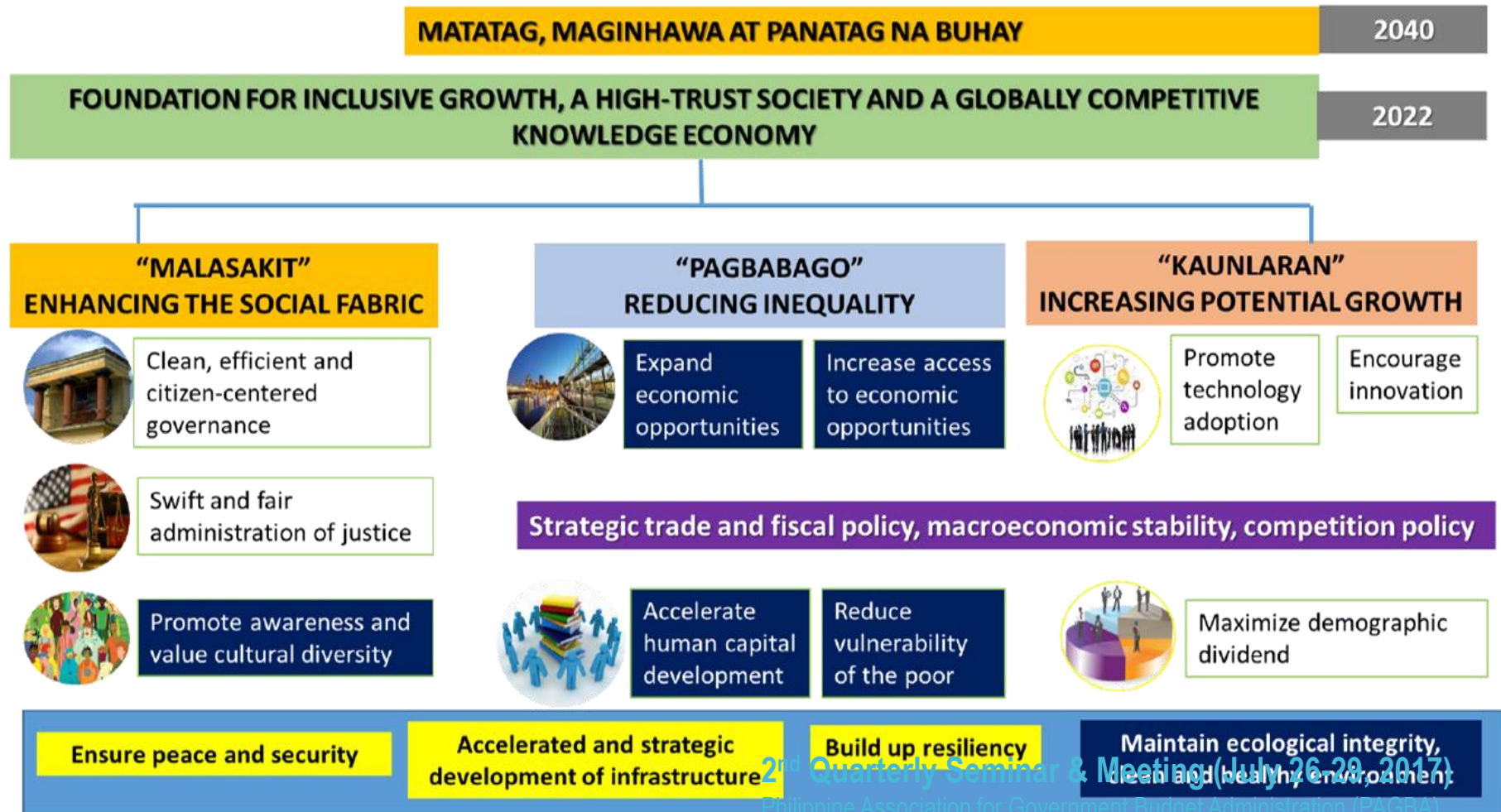
National Consultations



Tourism Summit

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AmBisyon Natin 2040 and National Tourism Development Plan



AmBisyon Natin 2040 and National Tourism Development Plan



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Competitiveness and Growth

Transport Infrastructure
Development

Travel
Facilitation



Product
Development

Tourism Investments and
Business Environment

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Competitiveness and Growth



Expanded Marketing Plan

Human Resource Capacity
and Service Standards



Quality Standards

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Sustainability and inclusive growth

**MSME Development in
Tourism**

**Gender and Women
Empowerment**

Cultural Offerings

**Environment and Climate
Change Adaptation**

**Risks and Crises
Management Programs**



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AmBisyon Natin 2040 and National Tourism Development Plan

AmBisyon Natin 2040

Expand and increase
economic opportunities

NTDP 2016-2022

- Transport Infrastructure Development
- Travel facilitation
- Tourism Investments and business environment
- Product development
- Expanded marketing plan

Reduce vulnerability of
the poor

- MSME Development in Tourism
- Gender and Women Empowerment
- Risks and Crises Management Programs

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AmBisyon Natin 2040 and National Tourism Development Plan

AmBisyon Natin 20240

NTDP 2016-2022

Accelerate human capital

- Human resource capacity and service standards
- Initiatives in embracing quality standards

Ensure ecological integrity

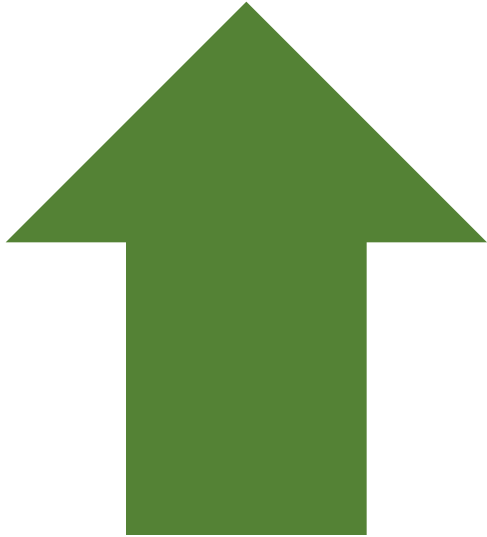
- Environment and Climate Change Adaptation

Promote cultural diversity

- Cultural Offerings

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OUTCOMES



Number of destinations developed
Number of tourism products and services
Number of accredited tourism enterprises
Investment in tourism
Competent, better supply / inventory of HR
Crisis-ready destination with
comprehensive
tourism support programs



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NTDP Guiding Principles: CLUSTER APPROACH



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NTDP Guiding Principles: CONVERGENCE APPROACH



LGU

Tourism Clusters



LGU

Airports, Roads, Seaports, Travel Facilitation

Accommodation, Attractions, Standards, Promotions



NCCA



LGU

Safety and Security, Cleanliness, Training, Legislation, Culture of Tourism



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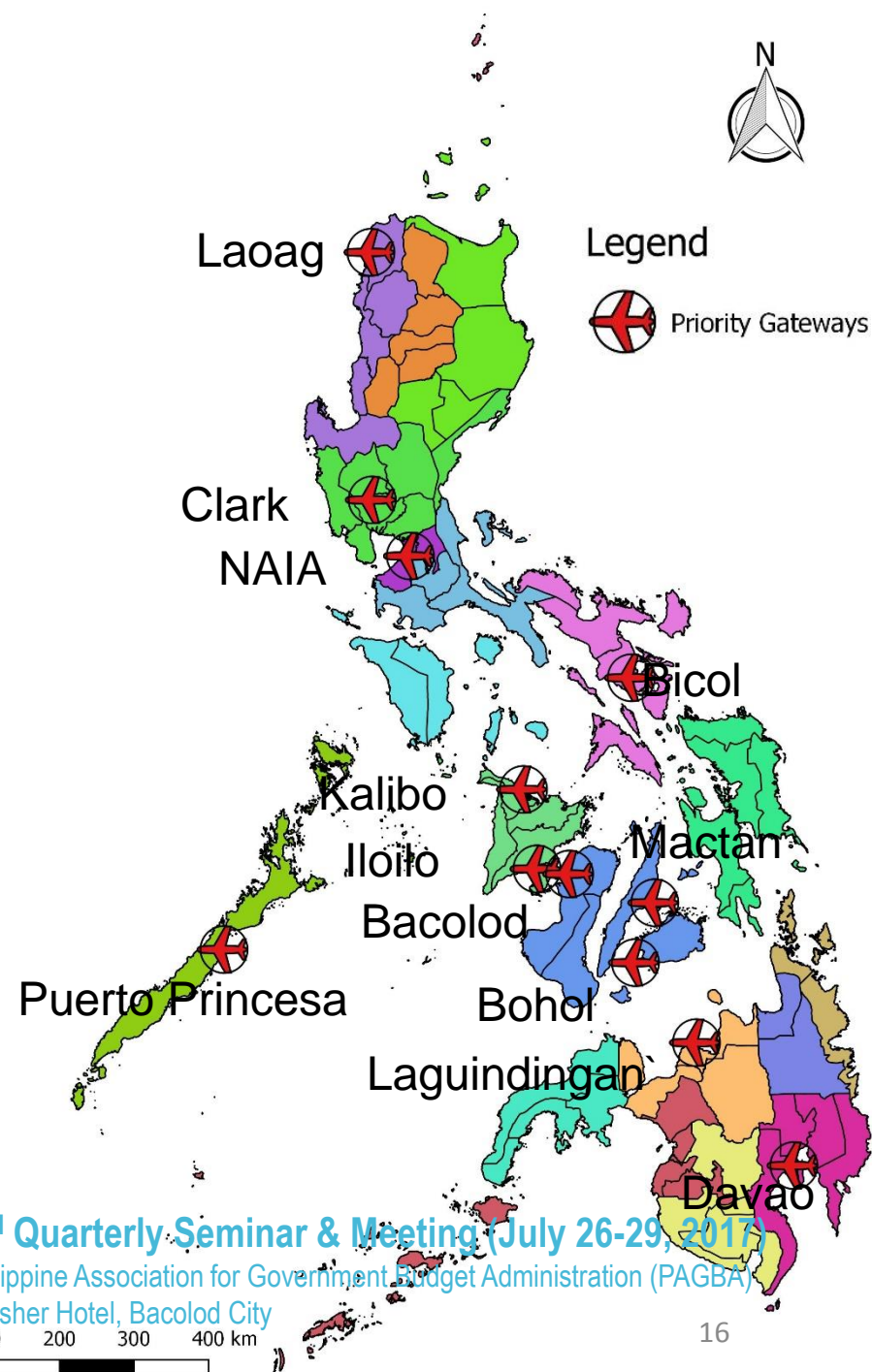
LGU

Tourism Clusters and Destination Areas

- 20 Tourism Clusters
 - 7 Northern Philippines
 - 6 Central Philippines
 - 7 Southern Philippines

of which 9 are Gateway Clusters (with international airports)

- 49 Tourism Development Areas



Medium Term Tourism Infrastructure Program (Million Php)



	2017	2018	2019	2020	2021	2022	TOTAL
Airports^[1]	7,788	18,027	12,338	7,659	9,484	7,472	62,768
Cruise Ports^[2]	1,858	1,100	600	950	900	700	6,108
Roads^[3]	22,500	35,000	38,400	42,000	26,500	20,100	184,500
Railway^[4]	150	300	150	300	47,500	207,500	255,900
Site Infrastructure^[5]	23,066	23,631	24,416	25,442	26,731	28,343	151,629
TEZs^[6]	792	2,282	2,316	2,817	3,522	4,402	16,131
Sub-Total Public	56,154	80,340	78,220	79,168	114,637	268,517	677,036
Transport Units	176	184	257	269	351	367	1,604
Accommodation^[7]	232,287	263,964	306,462	356,253	412,859	480,265	2,052,089
Aircraft Acquisition^[8]	39,700	39,700	39,700	39,700	39,700	39,700	238,200
Sub-Total Private	272,162	303,848	346,420	396,222	452,909	520,332	2,291,893
Total	328,316	384,188	424,640	475,390	567,546	788,849	2,968,929

^[1] Budget of DOTr including estimates of improvement costs in NAIA; Excludes estimated value of the privatization of the regional airports (New Bohol, Davao, Iloilo, Bacolod and Laguindingan) equivalent to PhP202 B and of NAIA for PhP 72.5 B; CAAP Budget on annual improvements not yet included

^[2] National Cruise Tourism Strategy 2016-2022

^[3] Based on the estimated road network requirements of the clusters

^[4] Includes estimates for Manila-Clark, Clark-Cordillera, Cagayan de Oro-Davao railway program based on design-build model

^[5] Includes power, streetscapes, water, signages in the tourism development areas

^[6] Based on the budget of TIEZA for 2017-2022 and estimated requirements for 2021 and 2022

^[7] Based on the estimated room requirements across various tourism development areas

^[8] Based on refueling program of Philippine carriers (5 A350s, 3 A320s, 30 A321 neos, and 16 ATR72600)

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NTDP 2016-2022 Indicative Budget Breakdown



Strategic Direction 1: Improving Competitiveness and Enhancing Growth

1.1 Intensify transportation and infrastructure development	Php 677,036 M
1.2 Pursue travel facilitation initiatives	120 M
1.3 Attract tourism investments	2, 291,893 M
1.4 Expand product development initiatives	207 M
1.5 Design and implement an expanded marketing program	9,250 M
1.6 Build human resource capacity and improve service standards	477 M
1.7 Promote initiatives in embracing quality standards	866 M
Sub-Total	Php 2,979,849 M

Strategic Direction 2: Pursue Sustainability and Inclusive Growth

2.1 Support MSME development in tourism	Php 434 M
2.2 Support gender and women empowerment initiatives	48 M
2.3 Expand and promote cultural offerings in tourism sites	556 M
2.4 Adopt measures to enhance environment preservation and climate change adaptation	210 M
2.5 Formulate measures to address tourism risks and crises	87 M
Sub-Total	Php 1,335 M

Grand Total

Php 2,981,184 M

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Targets



Indicators	Baseline	Targets						
	2015	2016	2017	2018	2019	2020	2021	2022
Revenue (Php Billion)	2,077	2,156	2,361	2,603	2,888	3,186	3,519	3,905
Inbound	307	353	407	473	564	661	776	922
Domestic	1,771	1,803	1,954	2,130	2,324	2,525	2,741	2,953
Employment (Million)	5.0	5.2	5.3	5.6	5.8	6.0	6.3	6.5
Share to Total Employment (%)	12.7	13.0	13.2	13.4	13.6	13.8	14.1	14.4
Visitors (Million)								
Inbound	5.4	5.9	6.5	7.4	8.2	9.2	10.4	12.0
Domestic	67.8	70.5	73.3	76.3	79.3	82.5	85.8	89.2
Number of Poor Beneficiaries (000)		486	449	556	448	481	492	541

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Tourism Development Program

(in million pesos)

Agency	2013	2014	2015	2016	2017	2018
DPWH	12,000.00	14,451.14	16,253.52	24,000.00	11,763.95	31,994.42
DOTr	3,514.80	9,552.57	10,262.41	7,136.31	3,590.73	6,904.02
DOJ	110.10	602.46	577.49	632.14		859.83
DOLE	371.10	378.94	501.50	551.60		650.40
DOH		144.00				641.00
DTI	32.10	5.96	97.74	20.82		546.83
DepEd		828.20		294.60	400.00	222.35
DENR	16.00	212.50	311.85	218.30	14.00	121.10
DILG		160.00			4.17	40.00
DFA	26.00	42.00	86.55			15.00
DOF	181.82					14.00
DOE					83.66	
Total	16,251.92	26,377.77	28,091.06	32,853.77	15,856.31	42,008.95

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