

# Understanding Philippine Tourism Development Thru Supply Data

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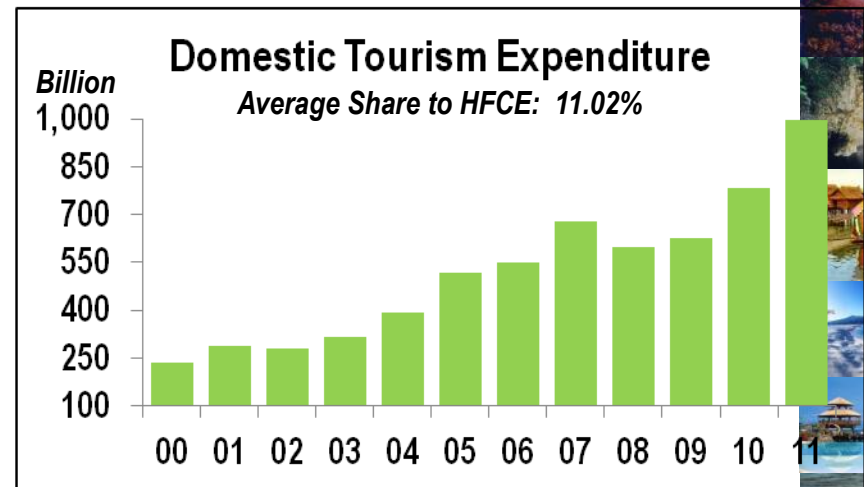
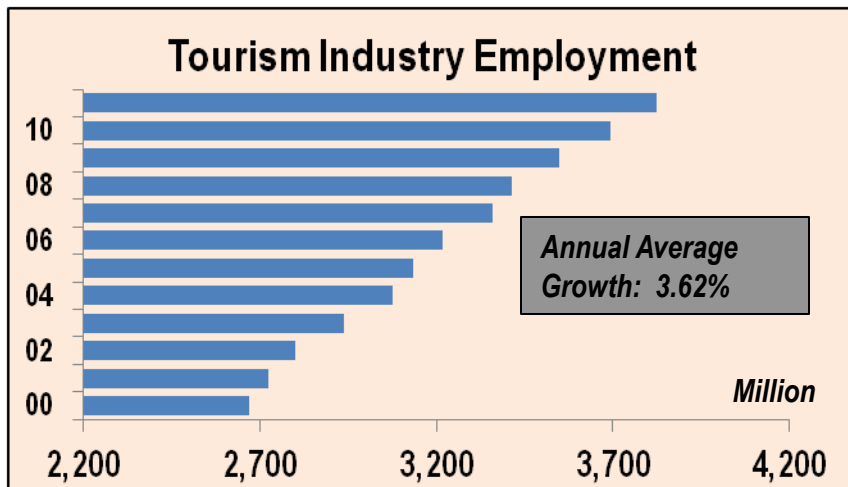
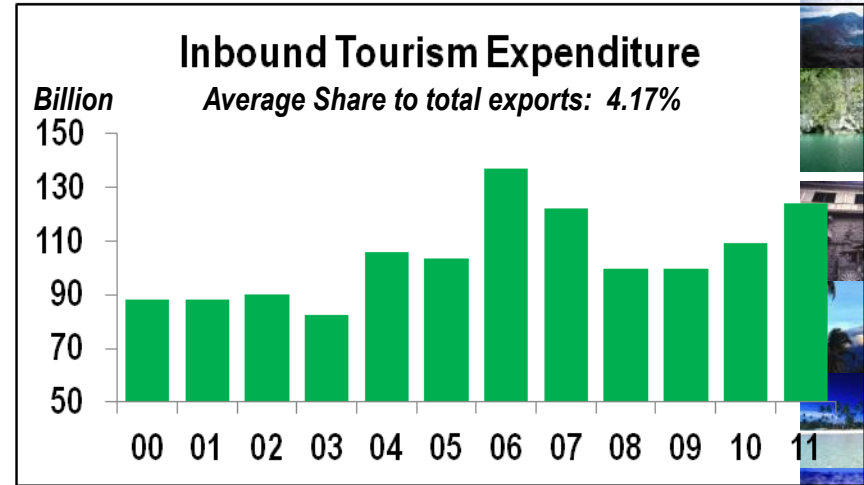
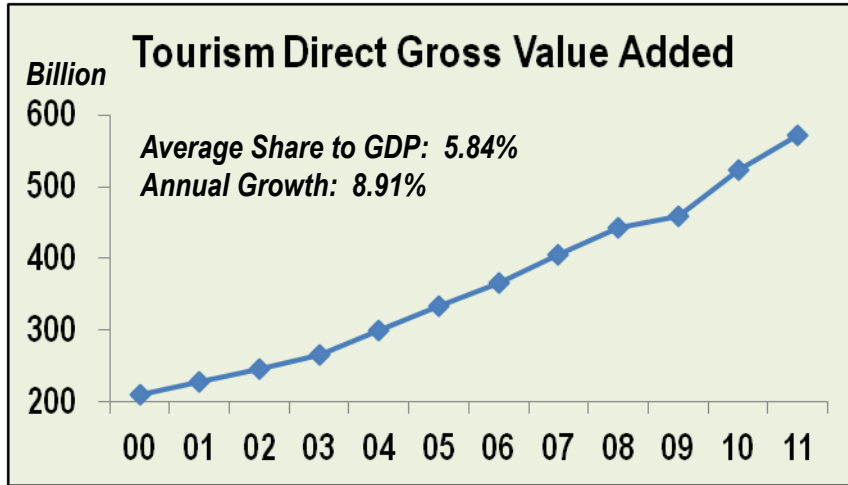


# Outline of Presentation

- Introduction
- The Tourism Statistical Framework and Tourism's Involvement in Statistical Coordination Mechanism
- Efforts in Tourism Supply Compilation
- Learnings, Challenges and Future Direction



# Tourism and the Economy



# The Need to Compile Tourism Statistics

## Philippine tourism statistics – “More Fun in the Philippines”

The Medium Term Philippine Development Plan considers tourism as a key sector for development in 2011 – 2016

### National Tourism Development Plan 2011-2016

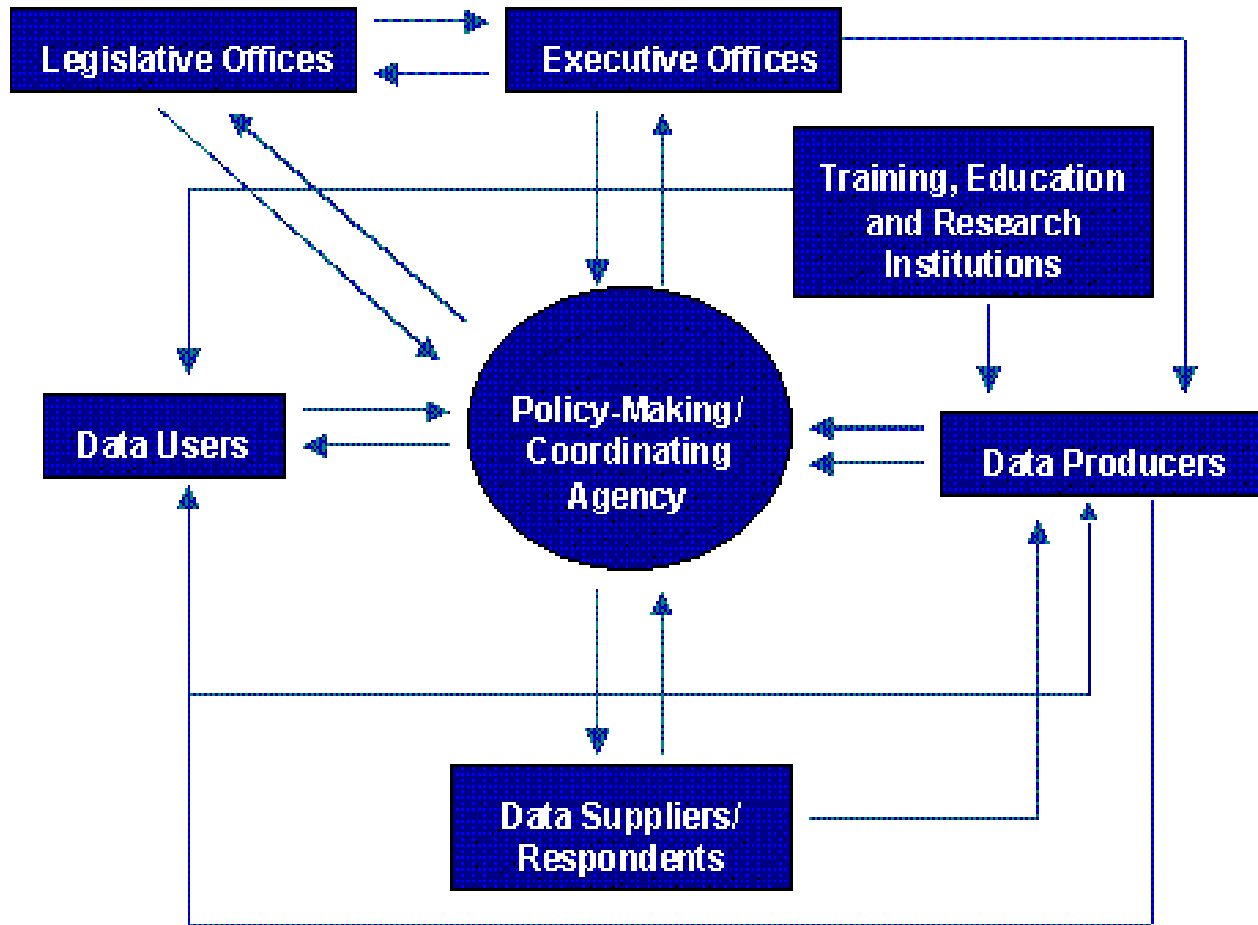
- 20 Tourism Clusters (TCs) and 78 Tourism Development Areas (TDAs)

### Economic and Social Impacts

- National: Tourism Satellite Accounts by NSCB-DOT
- Local: Growing interest in local tourism impacts – TDA, regional, LGU, project levels



# Philippine Statistical System



# Tourism's Involvement in Statistical Coordination Mechanism

- The Philippine Statistical Development Plan– 8<sup>th</sup> version for 2011-2017
- System of Designated Statistics
- Inter-agency Committees
- Statistical Budget Review Process
- Statistical Survey Review & Clearance System
- Statistical Standards and Classification Systems
- System of National Accounts
- Statistical Advocacy Mechanisms (NSM, NCS)





# Efforts in the Compilation of Tourism Supply Data in the Philippines



It's more fun in the Philippines 

# 1. DOT Database of Accredited Establishments and Endorsed Investments

- The accreditation program has kept a database of DOT accredited tourism establishments. The database is composed of accommodation establishments, restaurants, front liners and other establishments.
- The nationwide accreditation is a limited database due to its voluntary nature.
- DOT also evaluates for endorsement tourism investments. This is also voluntary, hence not all private sector projects and planned tourism ventures are captured.
- However, the data on endorsed investments provided baseline data that can indicate the amount of investments in tourism.





**Summary of Accredited Hotels By Region**

**October 31, 2012**

	No. of Hotels	Managerial		Rank		Expat	No. of Rooms	Classification			
		Male	Female	Male	Female			Economy	Standard	1st Class	De Duxe
Region I	12		-	-	-	-	421	5	4	2	1
Region II	11	-	-	-	-	-	460	7	4	-	-
Region III	17		-	-	-	-	1,314	6	9	1	1
Region IV	27	-	-	-	-	-	2,053	7	16	4	-
Region V	11	-	-	-	-	-	656	4	3	4	-
Region VI	10	-	-	-	-	-	523	1	5	1	3
Region VII	29	-	-	-	-	-	5,153	11	10	2	6
Region VIII	1	-	-	-	-	-	130	-	1	-	-
Region IX	4	-	-	-	-	-	230	2	1	1	-
Region X	2	-	-	-	-	-	372	-	-	1	-
Region XI	17	-	-	-	-	-	1,487	3	6	5	1
Region XII	3	-	-	-	-	-	152	3	-	-	-
Region XIII	3	-	-	-	-	-	231	-	3	-	-
CAR	23	-	-	-	-	-	1,227	9	14	-	-
Manila	30	-	-	-	-	-	4,843	6	16	2	6
Makati	11	-	-	-	-	-	4,278	-	4	-	7



# 1. DOT Database of Accredited Establishments and Endorsed Investments

Sectoral Profile of Endorsed Tourism Development Projects  
(Project Cost in Php Million, 2002-2009)

SECTOR	2002	2003	2004	2005	2006	2007	2008	2009	TOTAL
Hotel	272.591	3,746.299	1,124.118	8,593.369	13,171.024	11,472.885	12,069.797	3,792.861	54,242.944
Resort	10.000	236.840		2,506.637	4,615.624	12.348	1,306.447	1,147.318	9,835.214
Land Transport	471.075	507.597	163.779	13.695					1,156.146
Air Transpo									
Water Transport	75.000						187.180		262.180
Tourism Related Establishments				45.000		1,418.698	478.871	73.900	2,016.469
Tertiary Hospital							4,132.100	160.396	4,292.496
Ambulatory Clinic							340.000		340.000
Condotel							380.000		380.000
Ecotourism						250.000			250.000
Tourist Inns							4.000	474.192	478.192
Pension House									
Apartel				404.132		453.990	180.002		1,038.124
SPA								13.100	13.100
Sport and Recreational Center								1,672.584	1,672.584
Tourism Estates / Ecozone		981.997		375.500	75,979.198	8,643.930		29,012.955	114,993.580
TEZ Locator						92.350	1,353.700		1,446.050
<b>TOTAL</b>	<b>828.666</b>	<b>5,472.733</b>	<b>1,287.897</b>	<b>11,938.333</b>	<b>93,765.846</b>	<b>22,344.201</b>	<b>20,432.097</b>	<b>36,347.306</b>	<b>192,417.079</b>

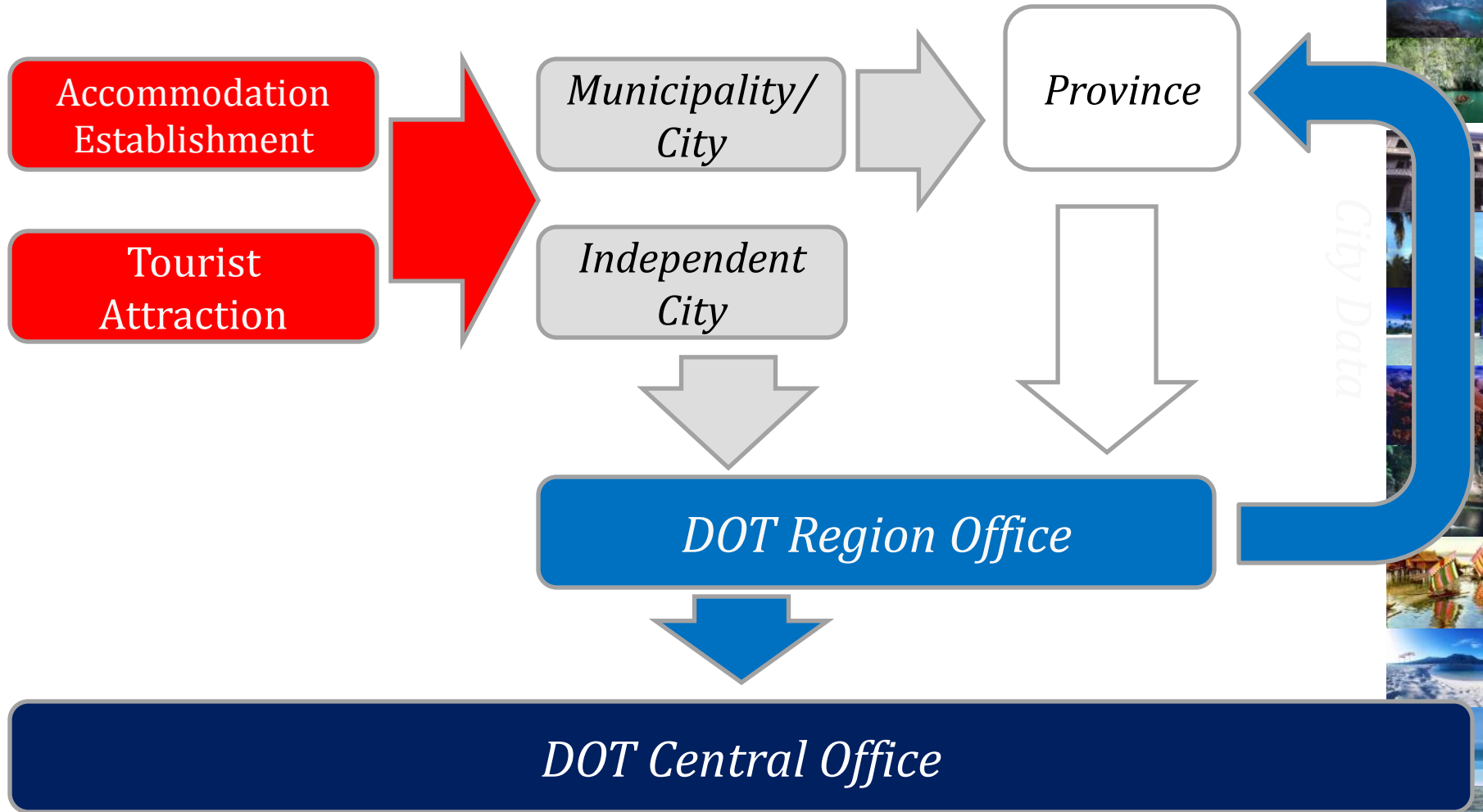


## 2. Basic Local Tourism Statistics Gathering: Standard Local Tourism Statistics System (SLTSS) Level 1

- Data gathering of regional and local government units of basic local tourism statistics using the standard methodologies developed with DOT.
- Data gathered are from standard sources to make sure of its comparability, reliability and relevance.
- The data gathering includes supply and demand database from local destinations.
- Supply data included are number of accommodation establishments, number of rooms and number of employees. It also include an inventory of tourist attractions



# Data Reporting Flow



# Compilation of AE-based Supply Data from Pilot Areas

Pilot Areas		Number of Rooms		%	Number of Employees		%	Ave. No. Employees / Rm	
		2010	2011	Difference	2010	2011	Difference	2010	2011
<b>Region 4</b>									
	Palawan	3182	3574	12.3%	1472	2053	39.5%	0.46	0.57
<b>Region 6</b>									
	Aklan	631	7256	1049.9%	300	4133	1277.7%	0.48	0.57
	Antique	297	364	22.6%	116	130	12.1%	0.39	0.36
	Capiz	734	No Rep.	N/A	283	No Rep.	N/A	0.39	N/A
	Guimaras	421	372	-11.6%	No Rep.	188	N/A	N/A	0.51
	Iloilo	2233	365	-83.7%	1368	322	-76.5%	0.61	0.88
	Negros Occidental	1405	1739	23.8%	988	1246	26.1%	0.70	0.72
	<b>Total / Ave:</b>	<b>5721</b>	<b>10096</b>	<b>76.5%</b>	<b>3055</b>	<b>6019</b>	<b>97.0%</b>	<b>0.53</b>	<b>0.60</b>
<b>Region 7</b>									
	Bohol	664	1819	173.9%	522	1751	235.4%	0.79	0.96
	Cebu	9221	13403	45.4%	5104	9047	77.3%	0.55	0.67
	Negros Oriental	1311	1488	13.5%	425	479	12.7%	0.32	0.32
	Siquijor	370	405	9.5%	200	341	70.5%	0.54	0.84
	<b>Total / Ave:</b>	<b>11566</b>	<b>17115</b>	<b>48.0%</b>	<b>6251</b>	<b>11618</b>	<b>85.9%</b>	<b>0.54</b>	<b>0.68</b>

# 3. Local Governance Performance Monitoring System (LGPMS): SLTSS

- This is an exploratory convergence with the Department (Ministry) of Interior and Local Government riding on their successful online LGU performance self-monitoring program.
- The supply part of the basic data gathering of SLTSS is encoded to a data capture form under the LGPMS.
- The captured data becomes part of the criteria for good performance of local government units
- Includes number of select tourism establishments catering to tourists, number of rooms, seat capacity and employees
- It also includes an inventory and self-evaluation of existing tourist attraction and local government expenditure and income from tourism



*DCF:*  
*1. Tourism Inventory*

**A. Inventory of licensed tourism establishments.**

1. Listing of **DOT accredited accommodation establishments** per type and number of rooms and employees are indicated

2. Listing of **non-DOT accredited accommodation establishments**

Type	Classification	Total No. of Establishments per Type	Total No. of Rooms	Total No. of Employees
1.1 Hotel	De Luxe			
	First Class			
	Standard			
	Economy			
1.2 Resorts	Special Interest Resort			
	Class AAA			
	Class AA			
	Class A			
1.3 Others	Apartels			
	Inns			
	Motels			
	Pension Houses			
	Condotel			
	Serviced Residence			
	Homestay			

Total No. of Accommodation Establishment without classification	Total No. of Rooms	Total No. of Employees



# 4. Compilation of Air Transport Data

- DOT also monitors the air transport sector and compile secondary data from CAAP, CAB and the private air transport service providers.
- Compiled are international and domestic flight frequency, seat capacity and load factor

No. of Airlines and Seats Per Week

2009 - 2011

Port	2011				2010				2009	
	Volume		Growth Rate		Volume		Growth Rate			
	No. of	No. of	No. of	No. of	No. of	No. of	No. of	No. of	No. of	No. of
	airlines	seats/week	airlines	seats/week	airlines	seats/week	airlines	seats/week	airlines	seats/week
<b>A. International Flights</b>										
Manila	33	188,788	6.45%	2.51%	31	184,162	19.23%	15.39%	26	159,599
Cebu	10	19,776	-	5.31%	10	18,779	-	17.17%	10	16,027





# 5. Accommodation Capacity Survey (ACS)

- Census of accommodation establishments in the whole country to determine major tourism supply indicators like number of AEs, rooms and employees in AEs per destination.
- Useful in determining the current capacity status of accommodation in local destinations – important indicator in planning and marketing these destinations.
- It is also a source for administrative policy indicators for accreditation and in determining what kind of market is served in specific destinations.



Table 1-A1

# Accommodation Capacity Survey

## Number of Establishments and Rooms by Province

As of July 2013

DESTINATION (Region / Province)	EXISTING ESTABLISHMENTS							UNDER CONSTRUCTION ESTABLISHMENTS		GRAND TOTAL			
	Number of Establishment	% Share	NUMBER OF ROOMS					Number of Establishment	No. of Rooms	Number of Establishment	% Share	Number of Rooms	% Share
			Available	% Share	Expansion	Total	% Share						
<b>NATIONAL CAPITAL REGION (NCR)</b>													
Manila	59	26.89%	5,720	25.37%	27	6,747	24.07%	1	27	90	24.52%	5,774	16.45%
Mandaluyong City	6	2.42%	1,316	3.83%	165	1,461	4.06%	0	0	6	2.16%	1,461	3.11%
Marikina City	3	0.91%	115	0.33%	0	115	0.32%	0	0	3	0.82%	115	0.24%
Pasig City	15	4.53%	1,772	5.16%	0	1,772	4.86%	4	760	19	5.16%	2,532	5.32%
Quezon City	41	12.39%	3,194	9.29%	14	3,208	8.83%	5	904	46	12.53%	4,112	8.85%
San Juan City	4	1.21%	144	0.42%	0	144	0.40%	0	0	4	1.09%	144	0.30%
Caloocan City	7	2.11%	564	1.70%	0	564	1.61%	0	0	7	1.91%	564	1.23%
Malabon City	3	0.91%	66	0.25%	0	66	0.24%	0	0	3	0.82%	66	0.16%
Valenzuela City	2	0.60%	46	0.14%	0	46	0.13%	0	0	2	0.54%	46	0.10%
Las Pinas City	6	1.81%	202	0.59%	0	202	0.56%	0	0	6	1.63%	202	0.42%
Makati City	69	20.85%	5,562	24.97%	360	6,942	24.61%	7	1,931	76	20.71%	10,673	22.87%
Muntinlupa City	11	3.32%	2,005	5.83%	0	2,005	5.52%	0	0	11	3.00%	2,005	4.22%
Paranaque City	26	7.85%	1,229	3.56%	1,170	2,399	6.60%	3	1,400	29	7.90%	3,799	7.99%
Pasay City	36	11.46%	5,540	16.12%	226	5,766	15.86%	12	4,652	50	13.62%	10,420	21.91%
Taguig City	7	2.11%	799	2.32%	0	799	2.20%	4	1,546	11	3.00%	2,345	4.93%
Pateros	2	0.60%	33	0.10%	0	33	0.09%	0	0	2	0.54%	33	0.07%
<b>SUB-TOTAL</b>	<b>331</b>	<b>4.76%</b>	<b>34,369</b>	<b>20.64%</b>	<b>1,964</b>	<b>36,333</b>	<b>20.66%</b>	<b>36</b>	<b>11,220</b>	<b>367</b>	<b>5.12%</b>	<b>47,553</b>	<b>23.95%</b>
<b>CORDILLERA ADMINISTRATIVE REGION (CAR)</b>													
Abra	19	5.62%	241	3.51%	0	241	3.47%	0	0	19	5.51%	241	3.34%
Apayao	25	7.40%	155	2.25%	9	164	2.36%	1	40	26	7.54%	204	2.83%
Benguet	24	7.10%	295	4.29%	17	312	4.50%	1	6	25	7.25%	318	4.41%



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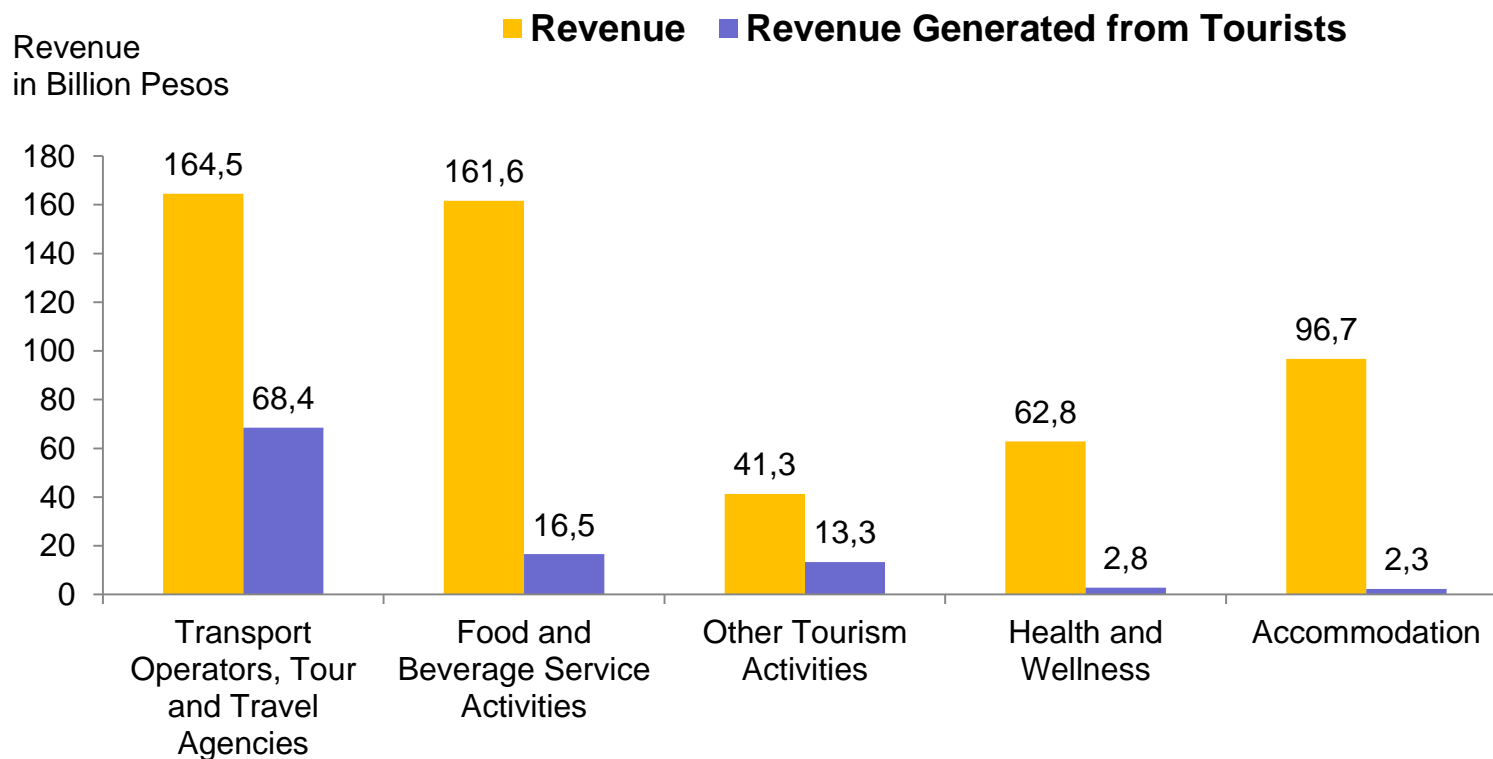


## 6. Survey of Tourism Establishments in the Philippines (STEP)

- A joint project with NSO, with supply data and revenues collected from tourism characteristic and connected establishments.
- The STEP results is aimed at providing inputs in the compilation of the PTSA
- Assess tourism resources and available infrastructure of the tourism sector
- Determine employment and revenue generated through tourism transactions
- Determine future expansion plans of tourism establishments



# *Transport, tour and travel agencies generate highest revenue from tourists in 2009.*



# Importance of Tourism Supply Data in the Philippine Context

- ❖ PDP, NTDP and Local Plans
- ❖ Design of appropriate intervention programs to build, strengthen community linkages and institutions
- ❖ Budget prioritization, allocation and implementation
- ❖ Monitoring and evaluation of programs/projects
- ❖ Inclusive Growth



# Learnings and Challenges

- ✓ Institutional Arrangement (roles, responsibilities, accountability, commitment, legal framework)
- ✓ Advocacy on its uses
- ✓ Capacity Building
- ✓ More demand for tourism statistics



# Future Development

- ✓ Review/Update of the Tourism Statistics Classification System
- ✓ Strengthen the advocacy for its institutionalization in the local government level.
- ✓ Develop better tools to enhance data gathering and report generation. (use of technology, development of more responsive report template, online submission, automated template).
- ✓ Strengthen advocacy of its use in policy making and development plans.
- ✓ Maximize sharing of data.





# Thank You!

(Email us at [mysay@tourism.gov.ph](mailto:mysay@tourism.gov.ph))

