

IMPORTANCE OF AIRPORTS TO TOURISM

A large commercial airplane is shown from a low-angle perspective, flying directly towards the viewer over a long, straight runway. The runway is flanked by green fields and leads towards a bright sunset or sunrise on the horizon. The sky is filled with soft, golden clouds, and the overall atmosphere is warm and inviting.

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Department of Tourism

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It is no coincidence that...



there is “cross-country empirical evidence of the mutually reinforcing relationship between a **high level of economic development** and a **well-established air transport industry**, resulting in **improvements in living standards.**”



Julie Perovic

*The Economic Benefits of Aviation and Performance
in the Travel & Tourism Competitiveness Index
International Air Transport Association (IATA)*

2013

Trends in Asia Pacific Aviation

INTERNATIONAL AIR PASSENGER TRAFFIC IN ASIA, 2011-2015



- Asia is considered the busiest air traffic in the world accounting for 34% of the total global air passenger traffic (APT).
- In 2015, APT in Asia reached 1.06 billion, an 10.39% increase from 2014, the highest among the regional groupings.
- APT grew by an average of 8.71% per year for the last 5 years, a rebound after the recession in major economies.
- Asian airports are also fast rising due to the rapid growth of low cost carriers.



ASEAN Comparison

TOTAL TOURIST ARRIVALS vs ARRIVALS BY AIR 2016

COUNTRY	TOTAL ARRIVALS (000's)	ARRIVALS BY AIR (000's)	% SHARE TO TOTAL
Philippines	5,967	5,895	98.79%
Thailand	32,589	---	---
Viet Nam	10,013	7,909**	78.99%
Singapore	16,403	12,651	77.13%
Indonesia	11,284*	8,346**	73.96%
Malaysia	26,520*	7,529**	28.39%

The Philippines does not have border crossings that other countries enjoy.

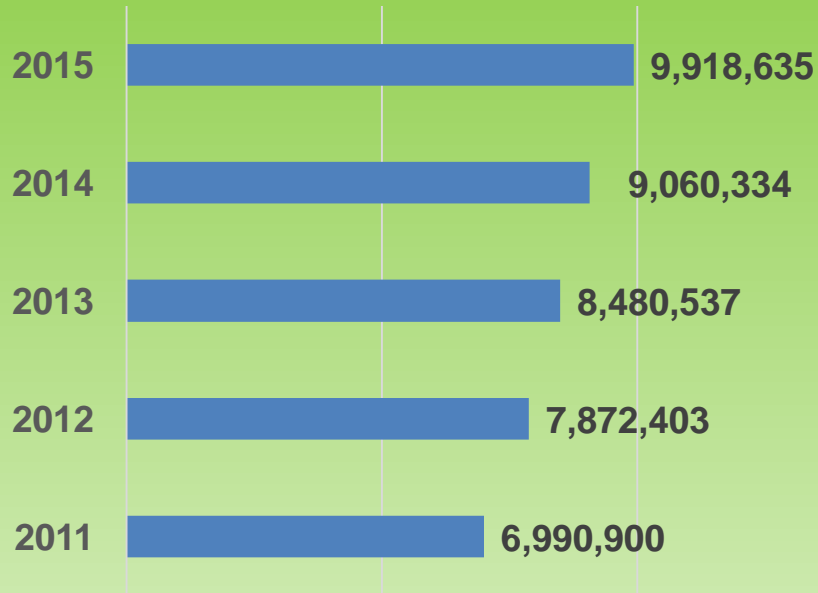
*Forecasted based on average performance for available months

**Estimated based on % share from 2014 UNWTO Compendium



Trends In Philippine Aviation

INTERNATIONAL AIR PASSENGER TRAFFIC TO THE PHILIPPINES, 2011-2015



- Average growth of 7.29% per year from 2011-2015
- Growth can be attributed to the opening of new routes to major and secondary gateways and additional frequencies by foreign and local carriers.
- 2015, air passenger traffic to the Philippines reached 9.92 million, a growth of 5.82% over the previous year.



PH Statistics

VISITOR ARRIVALS PER PORT OF ENTRY 2015

Passengers Handled		% from Total	Visitor Arrivals to PH	% from Pax Handled
International 2015			by Port of Entry 2015	
Manila	16,347,650	82.29%	3,726,295	22.79%
Cebu	1,892,235	9.53%	848,948	44.86%
Kalibo	822,252	4.14%	509,469	61.96%
Clark	675,091	3.40%	178,312	26.41%
Iloilo	59,646	0.30%	3,394	5.69%
Davao	51,885	0.26%	10,947	21.10%
Palawan	15,846	0.08%	8,374	52.85%
Total	19,864,977	100.00%	5,290,880	26.63%





- **NAIA** will remain the country's largest gateway, followed by **MCIA**
- **Kalibo & Clark** will remain the 3rd and 4th largest gateways but will have an increasingly large share percentage wise; Kalibo will still have the biggest share of chartered flights
- Full optimization of **Caticlan** will be a game-changer
- The growth of **Davao, Iloilo** and **Puerto Princesa** will depend on airport infrastructure and intensified markets to spur demand



National Tourism Development Plan

2011-2016



VISION

To become the “must experience” destination in Asia.

GOAL

To develop a highly competitive and environmentally and socially responsible tourism that delivers more widely distributed income and employment opportunities.



What we must do



- **Continue to pursue a more liberalized civil aviation policy**
- **Speed up the development and improvement of our airports**
- **Drastically improve the airport departure and arrival experience**
 - Customs, Immigration & Quarantine
 - Duty Free
 - Retail Mix
 - Toilets
- **Continue route development initiatives**
 - Attend international aviation events
 - Provide market support to local and international carriers and charter operations
 - Conduct familiarization tours for network planners





Thank you.