

**INTERIM REPORT FOR THE  
TOURISM MASTER PLAN AND PRE-FEASIBILITY STUDY ON THE  
TOURISM CLUSTERS OF BOHOL PROVINCE**

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## 1. INTRODUCTION

The Interim Report contains as highlight the summary matrix of projects in support of the tourism development framework plan. (Annex A) Details of the outlined projects (project profiles) are included as Annex B. Note that some of these projects were selected from the priority tourism projects of the LGU. (Annex C) These proposed projects are an offshoot of the Bohol Tourism Master Plan; a summary of which is provided in the succeeding sections for context.

## 2. PURPOSE AND SCOPE OF THE TOURISM MASTER PLAN

Tourism is a critical issue in Bohol, affecting quality of life and the economy. Its rich heritage consisting of beautiful landscapes, coastlines, diversified flora and fauna, religious/historic landmarks and archaeological artifacts and its human resources are the very foundations of tourism. In fact, the province which is envisioned as a prime eco-cultural destination in the Provincial Physical Framework Plan 2003-2022, is replete with tourism sites and products and manpower that are still relatively untapped.

Since 2004, Bohol has experienced a boom in tourism, outstripping all areas in the Philippines to become the fastest growing tourist destination in the country. The provincial government has been bullish in implementing transport infrastructure to match the demand, such as the 100% completion of the coastal Circumferential (Ring) Road, and the construction of the Panglao International Airport which is targeted to open by 2010. These programs and projects are reflected in the Medium Term Philippine Development Plan (MTPDP) 2004-2010 wherein which Bohol is one of the identified major destination focus. It also dovetails into the Department of Tourism (DoT)'s Central Philippines Project, a comprehensive tourism plan to make Bohol, Cebu, Boracay and the rest of the Central Philippines as the premiere tourist destinations in the country and the Pacific.

Notwithstanding all the infrastructure developments and tourism products/programs, the importance of sustaining its natural and cultural heritage will always be a key priority in the planning and development of tourism in Bohol. Thus, it is in this context that the Provincial Government of Bohol (PGB) has initiated the preparation of tourism master plan (TMP), a plan that would be a unified direction for the Province to further harness and sustain its vast tourism potential – under the adage “Bohol has it All”.

## 3. PROCESS

This preliminary plan has emerged from a collaborative process and has been shaped by a broad range of informed perspectives. Various agencies were consulted on various topics. Project team meetings, topical working group sessions, conversations with experts, professional research, community advisory group meeting, and a data survey of all LGUs in the province have all contributed to the plan's recommendations.

A database has been developed specific to the project based on the five (5) “A”s of Tourism in Bohol which includes: Assets, Activities, Accommodations, Access, and Ancillary Facilities.

The agreed framework employed to initiate and underpin the fast-tracking of tourism economic development in Bohol is the “clustering approach” or cluster-based strategy to deepen and broaden a set of agreed upon clusters characteristic of the region. A cluster in the context of this project is composed of three (3) tiers: 1) the tourism attractions/products which are comprised of local tourism activities and natural/man-made assets; 2) the support supplier industries which consist of

accommodations/attendant tourism-related facilities; and 3) support tourism cluster foundations which include human resources, physical infrastructure, promotional image, the policy/regulatory framework and a sustainable environment. The value of this approach is that it can demonstrate how “action” can be planned and implemented in discrete, geographically-defined areas. It allows for the stakeholders, particularly the business people in the same segment of the market, to collaborate where needed in order to achieve better results for the sector overall.

The SWOT (Strength-Weaknesses-Opportunities-Threats) was the analytical technique used to evaluate the planning area in an integrated manner. From this evaluation, the proposed thrust/strategies and anticipated impact were defined and translated into a set of plans dealing with the physical, environmental and socio-cultural aspects of the TMP. These plans are complemented by an implementation plan which espouses the key elements of the tourism system enabling environment whereby role players at the government, labor and business levels can optimize the value of its tourism resource.

**4. KEY FINDINGS**

From the analysis of the 5 “A”s of Bohol - its development potentials and challenges are summarized below:

Table 1: **BOHOL PROVINCE TOURISM SWOT MATRIX (2006)**

<b>Strengths (S)</b>	<b>Weaknesses (W)</b>	<b>Opportunities(O)</b>	<b>Threats (T)</b>
1. The unique & diverse natural terrestrial/ marine environmental resources and ecological heritage; winner of clean and green program competitions;  2. Rich and unique historical heritage;  3. Diverse tourism products and availability of tourism services;  4. Friendly and hospitable people and good levels of community involvement;  5. Vast agricultural lands and good marine resources to support tourism establishments/	1. For some towns, less than satisfactory levels of power, water, transportation, communications and tourism services in some towns; for some inland areas generally poor road conditions for some inland areas;  2. Comparatively small number of resorts/ hotels that can compare favorably with quality resorts/ hotels in other provinces; limited accommodations/ restrooms in the Chocolate Hills/ Carmen/ Bilar/ Loboc areas;  3. Many town-based tourism establishments are in need of physical upgrading; some architectural designs do not blend well with the	1. Province is expected to benefit from its own tourism development initiatives and from the spillover of tourism growth from neighboring provinces which have more developed tourism markets;  2. The National Government, via the DoT and other agencies are placing high priority on tourism development, particularly for Bohol Island;  3. Highly possible to combine tourism with livelihood and other economic activities due to economic potentials;  4. Many opportunities to develop niche market ecotourism products;  5. Opportunities to	1. The state of overland linkages (soft and hard infrastructure) between Tagbilaran City and the central and northern island towns/ areas may negatively affect the province’s appeal if not addressed or incorporated into a short term development plan for immediate implementation;  2. Some potentially destructive livelihood practices/ economic activities e.g. quarrying or settlement patterns which may affect portions of the natural environment that are considered assets for sustainable tourism;  3. Undefined delineation of declared areas;

Strengths (S)	Weaknesses (W)	Opportunities(O)	Threats (T)
<p>activities;</p> <p>6. Presence of government-funded or supported tourism development programs (mainly infrastructure sector projects);</p> <p>7. Existence of protected areas and strong LGU support in the Chocolate Hills areas;</p> <p>8. Good beaches and some excellent island settings;</p> <p>9. Fully functional land, air and water access systems; Operating ports/ airport at present to serve as primary gateways to the island province; Transport infrastructure is in generally satisfactory condition; The presence of large ships/ ROROs/ ferries from Manila and Cebu are boosts to further tourism growth;</p> <p>10. Internationally recognized brand/ image for the province;</p> <p>11. Excellent marine and freshwater resources; and</p> <p>12. Family-oriented and wholesome destination/s</p>	<p>environment;</p> <p>4. Limited marketing capability; inadequate promotional materials; no sustaining come-ons;</p> <p>5. No international brand name hotels/ resorts are in operation;</p> <p>6. Need to upgrade provincial, city and municipal LGU capabilities to fully plan and manage tourism assets and potentials;</p> <p>7. Human resources engaged in tourism services still have rather limited knowledge and skills;</p> <p>8. Limited community involvement for some areas;</p> <p>9. Land availability and land ownership structures and status may be a concern for future tourism investment;</p> <p>10. Full exposure to the elements e.g. strong <i>amihan</i> (northeast) monsoon winds for some parts of the province, etc.</p>	<p>encourage/ develop community-based tourism enterprises;</p> <p>6. Establishment of new tourism- oriented/ related business ventures that can help generate local employment;</p> <p>7. Increasing attention given by NGAs (like the DoT and PTA) to the Chocolate Hills areas, identified as a World Heritage Site; adopt a hill project can help generate more interest and participation in conservation and eco-tourism efforts;</p> <p>8. Other “brands” can be developed without the burden of market image history;</p> <p>9. Formulation of eco-cultural tourism plan; incorporation of agri-tourism/farm tours; use of untapped cultural resources; development of cultural-based groups;</p> <p>10. Strong LGU leadership, drive and support to effect tourism and infra-structure sector improvements;</p> <p>11. Development/ operation of the Panglao Island airport by 2010 as the main provincial gateway for international tourists;</p> <p>12. Development/ operation of the 3-in-1 viaduct-causeway (road, power, water alignment) between Cebu and Jetafe, Bohol, to help complete the planned Central</p>	<p>4. Negative publicity; possible over-exploitation of the Province as a tourist destination without the requisite protective mechanisms;</p> <p>5. Peace and order concerns i.e. particularly NPA presence in some inland/ upland areas;</p> <p>6. Possibility of improper development that may engender prostitution and drugs;</p> <p>7. Unnecessary artificial intervention; and</p> <p>8. Laws that compromise the socio-economic and cultural dimensions of affected lands/ resources.</p>

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<b>Strengths (S)</b>	<b>Weaknesses (W)</b>	<b>Opportunities(O)</b>	<b>Threats (T)</b>
		Philippines Super Region  13. 100% completion of the coastal circumferential road system which shall effectively connect all coastal towns and serve as jump-off points to the interior of the island; and  14. Existence of travel operators and tour guides.	

*Note: Partially sourced from the Integrated Provincial Tourism Plan for Bohol - Inception Report*

## **5. TOURISM DIRECTION**

### **Image to be Promoted and Target Market**

Bohol must progress further with its evolved and carefully cultivated image of being a family-oriented and wholesome eco-cultural tourist destination. The usual tarsier and Chocolate Hills combination could now be readily complemented by other sets of images/ experiences such as adventure/exploration rides and treks including on-road and coastal tours and food tours, souvenir collecting and crafts experiences.

Among the potential visitors in a repackaged Bohol tourism sector are:

- Nationals from Russia and other Central Asian and East European countries;
- Korean, Japanese, Tawan and mainland Chinese nationals;
- Retirees; and
- Special interest groups: kayaking, birdwatching, nature photography, native coastal life.

### **Development Strategies**

Various development strategies are hereby proposed to address the key issues pervading the three (3) tiers (Tourism Asset/Product, Supplier Industries and Tourism Cluster Foundations) of the Tourism Cluster Framework.

#### Develop and Expand Tourism Attractions/Products

- Encourage developments in Tourism Sites that have good linkages to Tagbilaran City
- Develop Further Tourism Sites that are unique to the southern Bohol seaboard
- Develop Tourism Sites that are close to tourism developments in Cebu Island
- Develop Tourism Sites that have the attributes for new tourism products/ packages
- Develop/Enhance the Emerging Agri-Tourism Industry of Bohol

#### Rationalize, Improve and Expand Supplier Industries

- Provide/Rationalize Additional Accommodations
- Institutionalize Homestay Program and other Services
- Improve Internal Linkages

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### **Strengthen Tourism Cluster Foundations**

- Develop Entrepreneurs or Business-Oriented Persons who will Generate Job Opportunities
- General Improvement of Physical Infrastructure
- Improve Linkages to other Visayan Islands and Mindanao
- Promotion of Tourism Image
- Establish Development Authorities
- Consolidate Private Sector Investment Programs
- Foster Sustainable Development

### **Development Phasing**

Based on the scope, levels and typology of programs and plans in this Tourism Master Plan, the phasing of developments shall take place over the following horizons:

Short term (2007-2010) during which the Panglao Airport is expected to be completed;

Medium term (2011-2015) occurring immediately after the opening of the Panglao Airport; and

Long term (2016-2025).

### **Carrying Capacity and Development Limitation**

In order to improve Bohol's carrying capacity given the expected increase in tourism influx, there is a need to provide and/or enhance hard infrastructure (e.g. roads and ports), soft infrastructure (e.g. transportation, telecommunications, human resource development, etc.), and accommodations as well as other tourism support facilities. However, the legal and fiscal framework should be put in place to ensure that such improvements be undertaken in the context of a sustainable development.

## **6. TOURISM DEVELOPMENT FRAMEWORK PLAN**

The framework plan is comprised of seven (7) key plan components as follows:

### **The Structure Plan**

#### **Tourism Clusters**

There are five (5) suggested Tourism Clusters for Bohol which have been delineated based on land and water forms/ characteristics, geography and linkages, land use and settlement patterns, available infrastructure, type/quality/quantity of tourism assets (whether nature-based or man-built) and tourism development potentials. (see Figure 1: Proposed Tourism Clusters) Each cluster has a designated tourism service center or hub which hosts the concentration of visitor services. Subsequent detailed tourism development master planning studies and future market validations may result in the identification of tourism sub-clusters for Bohol.

Figure 5.1A

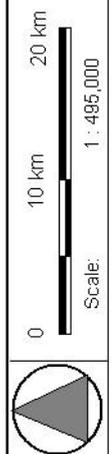
**Proposed Tourism Clusters Map**

**LEGEND:**

**Bohol Island by Clusters**

- Cluster 1
- Cluster 2
- Cluster 3
- Cluster 4
- Cluster 5

- Tourism Service Center
- Major Road
- Secondary Road
- Municipal Boundary
- Shoreline



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### Themed Tours

Other key strategies in furthering the tourism cluster framework plan is to widen and deepen the tourism experience in order to create as many diverse but competitive tourism products to help assure future visitor returns/referrals. This is undertaken through the development and/or enhancement of Tourism Attraction/Products such as the:

- Coastal Road Tour

The nearly 100% complete Circumferential (Ring) Road offers a golden opportunity to showcase Bohol's diverse tourist attractions, particularly those found in the coastal areas (landside and waterside). As such, key locations along the Ring Road could be initially developed into sites for marine-oriented tourism activities (that could be readily merged with landside tourism activities) or tourism accommodations and facilities. Government/private support is needed to make the Ring Road safe and accessible, as well as enhance it through the protection of picturesque locales and vistas alongside it.



Figure 2: COASTAL ROAD (AVAILABLE VISTAS)

- Agri-Tourism Circuit

A key thrust of the provincial government is to combine agriculture and tourism to give add-on value to its extensive irrigation facilities and in the process, to give additional benefits to the people in the countryside. Agri-tourism as a major or prevailing use or development goal necessitates a strong agricultural base (both land and water-based agriculture). In line with this, the strategy is to enhance the potentials of agri-tourism by identifying tourism

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development concepts that shall capitalize on existing/planned agricultural products and activities.

Both the artificial and natural bodies of water created by the Bayongan (San Miguel) and Malinaw (Pilar) Dams under Bohol Irrigation Phase 1 and 2 and the Capayas (Ubay) Irrigation Facility may function not only as a steady source of water but as the agri-tourism base for northeastern (NE) Bohol as well. The agri-tourism park at the Ubay Stock Farm, the existing/ proposed Bohol Experimental Station/s and the existing/ proposed Central Visayas Integrated Agriculture Resource Center/s shall fully complement the foregoing water-based agri-tourism attractions.

Tourism-oriented/ related attractions/ activities that are possible particularly for the dam areas have been identified but will still have to be further developed and packaged so that these may be included and allowed to play a key role in the planned tourism circuits. (See Figures 3 and 4)



**Figure 3: AGRI-TOURISM FACILITIES & ACTIVITIES**

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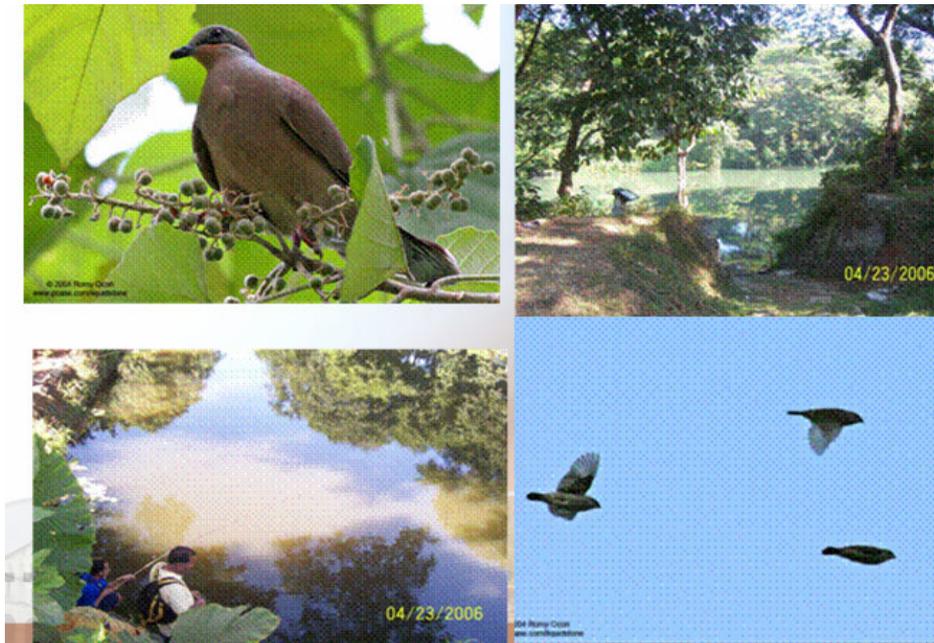


Figure 4: **ECOTOURISM ACTIVITIES EMBEDDED IN AGRI-TOURISM**

- Cross-themed Extra-Cluster Circuits

Additional all-year and seasonal tourism packages have been or could still be packaged as indicated from a cross-tabulation of existing and potential groups of tourism assets. (see Table 2: A Matrix of Tourism Circuits/Packages: Existing and Proposed) Some of the identified tourism circuits are intra-cluster while some are multi-cluster which allows for greater variety/choice/selection.

### **The Accommodations Plan**

The expected increase in Bohol tourist arrivals over the next few years shall require the year 2006 forecasts i.e. 1,691 (December room demand) to 2,629 (May room demand) to further increase in number. The expected visitor influx for the plan period is expected to increase from the 453,000 in 2006 to 2.4 million by 2025. This will result in a room shortage of 529 units in 2006 to 12,379 units in 2025. Provision of new rooms and the institutionalization of homestay facilities are proposed to address the increased demand for rooms. The proposed distribution of new investments (in terms of rooms and homestay facilities) is shown in Figure 5: Proposed Distribution of New Investments for Rooms (2007-2010) and Figure 6: Proposed Distribution of Homestay Facilities-Rooms (2007-2010). The candidate sites for coastal and inland accommodations in the province are indicated in the Final Tourism Master Plan.

The range of quality of existing rooms is also a concern as many appear to fall below Department of Tourism (DoT) standards. To get all the room supply under a provincial accreditation program that can successfully monitor the quality, quantity and level of service, the evolution of separate sets of facility physical standards for accreditation may need to be considered i.e. a provincial/city level and a municipal level of standards. A system of promotions can then be set to allow the operators to improve from a lower to higher physical standard with the corresponding incentives.

Table 2: A Matrix of Tourism Circuits/Packages: Existing and Proposed





**Bohol Tourism Master Plan and  
Pre-Feasibility Study on the  
Tourism Clusters of Bohol Province**

Figure 6

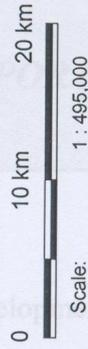
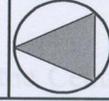
**Proposed Distribution of Homestay  
Facilities for 860 Rooms for Bohol  
(Over Planning Period of 2007-2010)**

**LEGEND:**

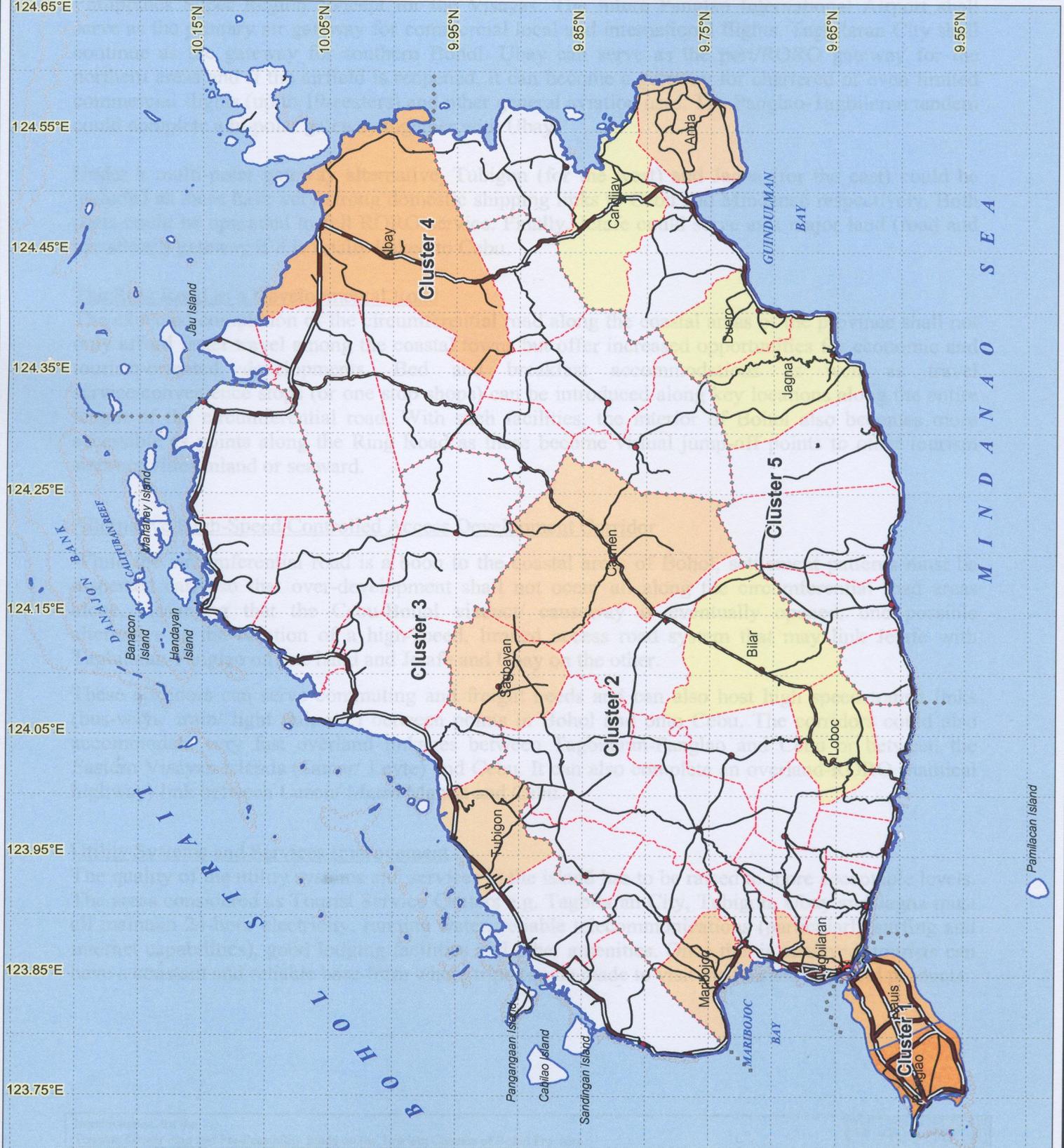
- No new rooms
- 5 - 15
- 30 - 70
- 130 - 150
- 250 - 300

- Cluster Boundary
- Major Road
- Secondary Road
- Municipal Boundary
- Shoreline

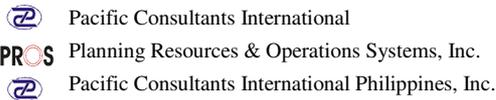
Note: Refer to Annex K for actual numbers of proposed Homestay facilities for each Municipality/City



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### **The Transport Infrastructure Plan**

The plan calls for a four (4)-pronged strategy in support of the structure plan for tourism development. (See Figure 7: Transport Infrastructure Plan)

#### The Multi-Pole/Role Gateways

The creation of bi-polar or multi-polar gateways for the province ties in very well with the Central Philippines Super Region concept for the Visayas. The future Panglao International Airport shall serve as the primary air gateway for commercial local and international flights. Tagbilaran City shall continue as the gateway for southern Bohol. Ubay can serve as the port/RORO gateway for the northern areas and if the airfield is reopened, it can become a gateway for chartered or even limited commercial flights (up to 19-seaters) and other general aviation uses. The Panglao-Tagbilaran tandem could complete a bi-polar gateway together with Ubay.

Under a multi-polar gateway alternative, Tubigon (for the west) and Jagna (for the east) could be included as these have very strong domestic shipping links to Cebu and Mindanao respectively. Both ports could be upgraded to full RORO service. Finally, Jetafe could serve as a major land (road and transit/rail) gateway if it is finally linked to Cebu.

#### The Ring Road as a Developmental Road

The expected completion of the circumferential road along the coastal areas of the province shall not only afford faster travel among the coastal towns but offer increased opportunities for economic and tourism-oriented developments. Bed and breakfast accommodations as well as travel service/convenience stops (or one stop shops) can be introduced along key locations along the entire length of the circumferential road. With such facilities, the interior of Bohol also becomes more accessible as points along the Ring Road as these become virtual jump-off points to other tourism sites/activities inland or seaward.

#### Alternative High-Speed Controlled Access Development Corridor

While the circumferential road is a boon to the coastal areas of Bohol, settlement patterns must be dispersed early so that over-development shall not occur all along the circumferential road areas alone. Assuming that the Cebu-Bohol viaduct/ causeway is eventually opened, one possible alternative is the creation of a high-speed, limited access road system that may link Jetafe with Tagbilaran-Panglao on one hand and Jetafe and Ubay on the other.

These corridors can serve commuting and freight needs and can also host high speed transit links (bus-ways/ train/ light rail, etc.) between points in Bohol and onto Cebu. The corridors could also accommodate very fast overland linkages between Tagbilaran-Panglao and Cebu or between the Eastern Visayan islands (Samar/ Leyte) and Cebu. It can also complete an overland-RORO (nautical highway) link between Luzon/ Metro Manila and Cebu.

#### Utility Systems and Services Improvement

The quality of the utility systems and services in the island has to be raised to more acceptable levels. The areas considered as Tourist Service Centers e.g. Tagbilaran City, Tubigon, Ubay and Jagna must all maintain 24-hour electricity, running water, reliable telecommunications (particularly surfing and internet capabilities), good lodging facilities and other amenities. Once this is achieved, tourists can have a constant and reliable base from where trips can be made to visit the tourism sites and products.



**Bohol Tourism Master Plan and  
Pre-Feasibility Study on the  
Tourism Clusters of Bohol Province**

Figure 7

**Transport Infrastructure Plan  
(Hard Infrastructure)**

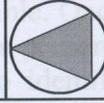
**LEGEND:**

**Road Improvement for Bohol  
Tourism Development Project**

- Improvement of East-West Corridor (Clarín-Sagbayan-Carmen-Sierra Bullones-Jagna section)
- Getafe-Buenavista-Danao-Carmen section
- Alicia-Pilar-Sierra Bullones section
- Anda Peninsula (Guindulman-Anda-Candijay section)
- Tubigon-San Isidro-Balilihan Sikatuna-Baclaran section
- Sagbayan-San Isidro-Cortes section

**Existing Roads**

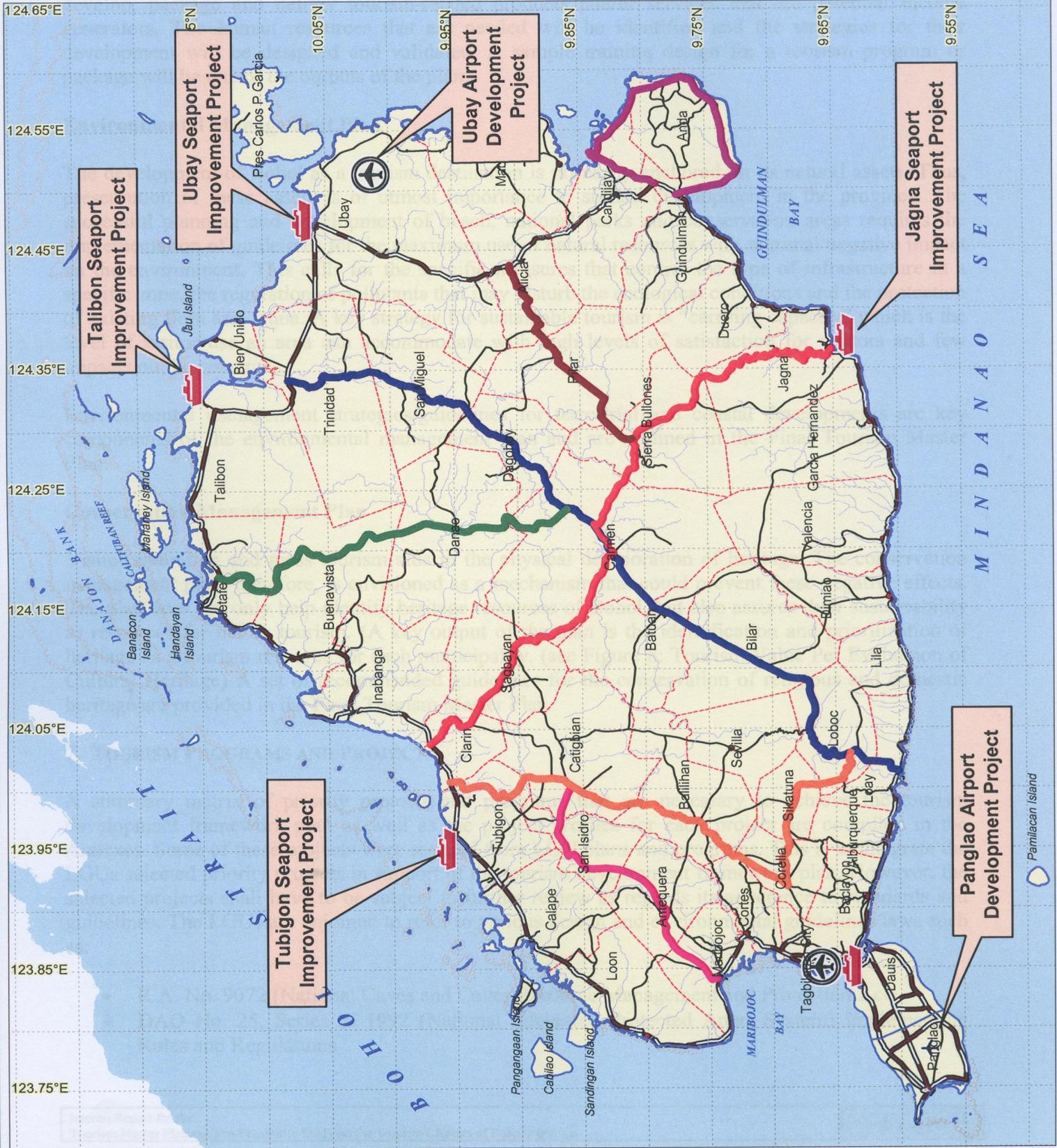
- Major Road
- Secondary Road
- Municipal Boundary



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Source: PCI-PROS: Municipal Data Form of Bohol for the Bohol Tourism Master Plan





## **Entrepreneurship Development Plan**

The Bohol provincial government views ecotourism as also pro-poor tourism as it can be channeled to increase the standard of living in the rural areas through the development of micro-enterprises which has the potential to close the gap between the employable labor force and actual jobs available. Once, the tourism programs and projects are identified, an entrepreneurship development plan is prepared for selected program and projects to enable the individual or groups of individuals to identify, develop, package and deliver tourism-related products and/or services that are potential income generators. The human resources that are needed will be identified and the strategies for their development will be designed and validated. A sample training design for a tourism program or package will be one of the outputs of the plan.

## **Environmental Management Plan**

The development of Bohol as a tourism destination is primarily anchored on its natural assets. Thus, preservation of these assets is of utmost importance to sustain development in the province. The successful planning and development of beach, national parks and conservation areas requires the implementation of guidelines for the maximum use of natural resources with minimal negative impact on the environment. This calls for the specific measures that control the type of infrastructure in a specific zone, the regulation of pollutants that may disturb the ecological conditions and the protection of existing flora and fauna. A key strategy for sustainable tourism is “carrying capacity” which is the level of visitor use an area can accommodate with high levels of satisfaction for visitors and few impacts on the resources.

Environmental management strategies/guidelines for terrestrial and coastal developments are key components of the environmental management plan and are outlined in the Final Tourism Master Plan.

## **Conservation Management Plan**

Visitor saturation and mass tourism aids in the physical deterioration of heritage. The conservation management plan, therefore, is envisioned as a mechanism that could prevent these negative effects. The plan does not only help identify heritage resources of Bohol, but also assures their sustainability as resources for use in tourism. (A key output of the plan is the identification and prioritization of heritage as a tourism resource for each municipality. (see Figure 8: Tourism Value Per Evaluation of Cultural Heritage) A set of recommended guidelines for the conservation of religious and domestic heritage are provided in the Final Tourism Master Plan.

## **7. TOURISM PROGRAMS AND PROJECTS**

A summary matrix of priority projects and programs that are necessary to achieve the tourism development framework plan as well as the project profiles for each project are compiled in the Annexes. Some of these projects were sourced from LGU plans and programs. This is to integrate the LGUs selected priority projects in support of the tourism development framework plan. However, the selected projects shall have to be subject to further review as regards its adherence to standards and guidelines. The LGUs are enjoined to refer to various design and environmental guidelines/laws such as:

- R.A. No. 9072 (National Caves and Caves Resource Management and Protection Act)
- DAO No. 25, Series of 1992 (National Integrated Protected Areas System) Implementing Rules and Regulations

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- Tourism Code
- Bohol's Tourism Development Guidelines
- Bohol's Ecotourism and General Environmental Guidelines
- Suggested Guidelines for Conservation of Bohol's Domestic and Religious Heritage

in developing/reviewing their project proposals.

## **8. IMPLEMENTATION PLAN**

### **Development Authorities**

To ensure optimum utilization of resources, economical and effective utilization of land. The proposed Metro-Tagbilaran Region Authority (MTRA) and the Panglao Island Authority (PIA) are both proposed executive agencies which may or may not be vested with quasi-legislative or quasi-judicial powers. Both Authorities may perform physical planning, monitoring and coordinative functions, and in the process exercise regulatory and supervisory authority over the delivery of area-wide services within their respective jurisdictions without diminution of the autonomy of the local government units (LGUs) and the provincial government, particularly its Bohol Provincial Tourism Office (PTO).

### **Land Use Control and Development Guidelines**

Cognizant of the fragile environmental condition of much of Bohol, a coordinated tourism development program must be in place to avert over-development. While the physical plans can readily address some aspects of tourism development, it is doubly important, to complement these with administrative and legal tools such as the Tourism Code and the attendant Tourism Standards, Guidelines and Regulations (TSGR) that shall all address concerns under distinct Environmental Guidelines.

### **Role of the Government Sector**

It is the Government's role to ensure that improved facilities and infrastructure to address the continued growth of the tourism sector in Bohol are in place. For the short term, upgrading of port-related facilities at the various gateways to the province and the completion of the Panglao International Airport are required, while in the long term the Central Philippines Super Region Bridge System should be seriously considered.

### **Private Sector Investment Climate**

While the national and local governments have to focus on developing the basic infrastructure to weave and bind the island together on one hand, and the planned Central Philippines Super Region on the other, there should also be great focus on how to best harness private sector goodwill and investments. An integrated tourism-oriented program to help invest private sector funds for future facilities/accommodations/ soft infrastructure (such as vehicles, telecommunications, etc.) human resource development, land/property registration, participation of dual citizens, general investor incentives and the like must also be in place to guide the private sector in positioning themselves.

The continued growth of the tourism sector in Bohol augurs well for the flow of investments in accommodation and tourism related facilities. The industry is experiencing room shortages which must be addressed decisively in order to sustain the momentum. The combined investment

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-  Pacific Consultants International
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requirement for moderate to low quality rooms for the entire industry is almost P1 billion for 2006 increasing to just under P23 billion in 2025. Clearly, the investment climate in tourism accommodation for the plan period shows strong potential.

Industry income in 2006 using the moderate projections, from visitor spending in accommodations, are expected to top P900 million for both international and domestic travelers. The food sector is expected to generate P570 million, internal travel services to gross P260 million, tour packages to earn over P400 million and sale of souvenir items to earn another P260 million.

Given the number of tourist arrivals and the demand for rooms, direct and indirect employment opportunities can be projected. In the moderate projections, by the year 2010 another 9,300 jobs would be created bringing the industry total to over 17,200 persons by tourism and affiliated concerns.

By 2010 income for the sector is expected to grow to P4.4 billion with gross earnings in accommodations jumping to over P1.6 billion, food services P1 billion, transport and souvenirs both at P465 million and tours earning P740 million.

**Annex A: SUMMARY MATRIX OF PRIORITY PROJECT AND PROGRAMS**

<b>A. TOURISM ATTRACTION/ PRODUCT</b>			
<b>ASSETS / ACTIVITIES</b>	<b>A.1 NEW TOURISM PRODUCT</b>	<b>PHASE</b>	<b>COST in (PhP)</b>
	A.1.1 <i>Promotion of the (Rajah Sikatuna Protected Landscape) RSPL</i> as Eco-Tour Destination to promote it as an eco-tour destination and to fine-tune its products/activities	2007-2008	4,000,000
	A.1.2 <i>Development of Marine-Based Ecotour Circuit(s) in the Northern coast of Bohol</i> (Calape, Tubigon, Getafe, Inabanga) to synergize the individual destinations/activities	2007-2008	500,000
	A.1.3 <i>An Integrated Community-Based Eco-tourism Development Project in Antequera</i> (The Waterfalls, Cave and River Hopping adventure) to protect and increase community awareness of these assets, enhance community tourism and generate livelihood opportunities	2007-2008	2,900,000
	A.1.4 <i>Coastal Road Tour</i> offers a golden opportunity to showcase Bohol's diverse attraction especially those found in the coastal areas ( <b>under study</b> )		
	A.1.5 <i>Ubay Agri-Tourism Project</i> ( <b>under study</b> )		
	A.1.6 <i>Loboc Town Center Project</i> ( <b>under study</b> )		
	A.1.7 <i>Circumferential Road Convenience Stop cum Bed and Breakfast Project</i> ( <b>under study</b> )		
	<b>SUB-TOTAL</b>		<b>7,400,000</b>
	<b>A.2 NEW TOURISM DESTINATION</b>	<b>PHASE</b>	<b>COST in (PhP)</b>
	A.2.1 <i>Ecotourism promotion through Biodiversity Conservation and Management of Basdio Marine Sanctuary</i> in Guindulman to protect and increase community awareness of these assets, enhance community tourism and generate livelihood opportunities	2007-2008	10,000,000
	A.2.2 <i>Development of Badiang Spring Falls in Valencia</i> as an Eco-Resort to promote eco-tourism livelihood projects	2007-2008	30,000,000
	A.2.3 <i>Binaliw Falls Development Project in Clarin</i> to protect and increase community awareness of these assets, enhance community tourism and generate livelihood opportunities	2007	7,500,000
	A.2.4 <i>Development of a New Tourism Base in Bilibili Spring (Cortes)</i> (consisting of a village center, capsites and lodges) which flows to the Abatan River to provide alternative livelihood to the community	2007-2008	45,000,000
	A.2.5 <i>Development of a beachfront in Lila</i> as a new tourism site to provide an alternative tourism site	2007-2009	21,000,000
	<b>SUB-TOTAL</b>		<b>113,500,000</b>

**Annex A: SUMMARY MATRIX OF PRIORITY PROJECT AND PROGRAMS**

<b>B. SUPPLIER INDUSTRIES</b>			
<b>ACCOMMODATIONS</b>	<b>B.1 ACCOMMODATIONS &amp; SUPPORT FACILITIES DEVELOPMENT</b>	<b>PHASE</b>	<b>COST in (PhP)</b>
	B.1.1 <i>Generic Budget Hotel (Local Standard) – Resort Facility</i> in Anda to provide an alternative but budget tourist facility mainly through private sector participation/initiatives.	2008-2010	25,000,000
	B.1.2 <i>Generic Budget Hotel (International Standard) Resort Facility</i> in Panglao to provide an alternative but budget tourist facility mainly through private sector participation/initiatives.	2008-2010	55,000,000
	B.1.3 <i>Generic Businessman’s Budget Hotel (Local Standard) in Ubay</i> to provide an alternative but businessman’s budget facility mainly through private	2008-2010	18,000,000
	B.1.4 <i>Generic Mountain Hotel and Resort Complex (Local Standard) in Tubigon</i> to provide an alternative but budget tourist facility mainly through private sector participation/initiatives	2008-2010	30,000,000
	B.1.5 <i>Generic Budget Hotel – Resort Facility (Local Standard) in Dimiao</i> to provide an alternative but budget tourist facility mainly through private sector participation/initiatives.	2008-2010	40,000,000
	<b>SUB-TOTAL</b>		<b>168,000,000</b>
<b>ACCESS (SOFT INFRASTRUCTURE)</b>	<b>B.2 ACCESS: SOFT INFRASTRUCTURE</b>	<b>PHASE</b>	<b>COST in (PhP)</b>
	B.2.1 <i>Multi-Faceted Tourist Shuttle Services</i> to provide air-conditioned shuttle vans providing high quality and innovative transport services to both day tourists and sightseers.	2007-2008	42,000,000
	B.2.2 <i>Route-Based Tourism Oriented Public Transport Modes</i> to provide convenient, and easily accessible and affordable tourist transport services consisting of high quality public utility jeepneys and mini-buses.	2007-2008	22,000,000
	B.2.3 <i>Training and Accreditation System for drivers of Tourist Transportation systems</i> to train drivers to become tourist friendly, and promote tourist spots, cultural places, local products to tourists and visitors.	2007-2008	2,150,000
	B.2.4 <i>Bohol Tourist Stop Shop and Information Center</i> where tourists and guests can take a rest, dine and shop for local specialty products as well as obtain directions/information	2007-2008	3,200,000
	B.2.5 <i>Bohol Tourist Cruise</i> to showcase the beautiful sceneries of Bohol to tourists and at the same time provides relaxation, entertainment and pleasure on their journey.	2008-2009	65,000,000
	<b>SUB-TOTAL</b>		<b>134,350,000</b>

**Annex A: SUMMARY MATRIX OF PRIORITY PROJECT AND PROGRAMS**

<b>C. TOURISM CLUSTER FOUNDATIONS</b>			
<b>ASSETS: HUMAN RESOURCES</b>	<b>C.1 ENTREPRENEURSHIP DEVELOPMENT THROUGH ECOTOURISM</b>	<b>PHASE</b>	<b>COST in (PhP)</b>
	C.1.1 <i>Entrepreneurship Development for Agricultural Tourism in Ubay</i> in support of a tourism livelihood project through the development of “rural farm entrepreneurs” replicable in support of various types of tourism enterprise across Bohol	2007-2008	50,000
	<b>SUB-TOTAL</b>		<b>50,000</b>
<b>ACCESS &amp; ANCILLARY FACILITIES: PHYSICAL/HARD INFRASTRUCTURE</b>	<b>C.2 ACCESSIBILITY AND FACILITY DEVELOPMENT PROGRAM</b>	<b>PHASE</b>	<b>COST in (PhP)</b>
	C.2.1 <i>Panglao Airport Development Project</i> is a proposed new international airport that would cater to the increasing air passenger demand in Bohol, thereby boosting tourism industry not only in the province of Bohol but to the newly-established Central Philippines Super Region	2007-2009	2,430,000,000
	C.2.2 <i>Ubay Airport Development Project</i> is a domestic airport that could accommodate small aircrafts to create higher mobility.	2007-2009	218,000,000
	C.2.3 <i>Bohol Seaports Development Project</i> is an improved and efficient seaport as entry and exit points in Bohol. All seaports could accommodate sea vessels from medium-sized fastcrafts to large sea vessels.	2007-2010	125,000,000
	C.2.4 <i>Road Improvemest for Bohol Tourism Development Project</i> covers existing provincial roads that traverse the municipalities of Clarin, Sagbayan, Carment, Sierra Bullones, Jagna, Getafe, Buenavista, Danao, Alicia, Pilar, Guindulman, Anda, Candijay, Tubigon, San Isidro. Balilihan, Sikatuna, Baclayon, Sagbayan and Cortes.	2007-2010	47,700,000
	C.2.5 <i>Bohol Engineering Landfills</i> which aims to manage solid waste disposal of the entire Province of Bohol.	2008-2009	25,000,000
	C.2.6 Panglao Island Sewerage Masterplan which aims to establish a comprehensive sanitary and sewerage masterplan that address and complement the development of Panglao Island as it emerges as a major tourist and commercial destination.	2008	4,000,000
	C.2.5 <i>Infrastructure Support Facilities</i> provides for engineered landfills servicing the municipalities of Albur, Tubigon, Balilihan, Carmen, Sierra Bullones, Pilar, Talibon, Guindulman and San Miguel (under study)		
	<b>SUB-TOTAL</b>		<b>2,849,700,000</b>
<b>IMAGE</b>	<b>C.3 PROMOTION CAMPAIGN PROGRAM</b>	<b>PHASE</b>	<b>COST in (PhP)</b>
	C.3.1 Inputs to Promotion Campaign Projects ( <b>under study</b> )		
	<b>SUB-TOTAL</b>		

**Annex A: SUMMARY MATRIX OF PRIORITY PROJECT AND PROGRAMS**

<b>C. TOURISM CLUSTER FOUNDATIONS</b>			
<b>POLICY/ REGULATORY FRAMEWORK</b>	<b>C.4 POLICY/REGULATORY FRAMEWORK</b>	<b>PHASE</b>	<b>COST in (PhP)</b>
	C.4.1 <i>Provincial Accreditation Program</i> to monitor the quality, quantity and level of service of existing rooms through the evolution of separate sets of standards and a system of promotions/incentives ( <b>under study</b> )		
	<b>SUB-TOTAL</b>		

<b>SUSTAINABLE ENVIRONMENTS</b>	<b>C.5 SUSTAINABLE DEVELOPMENT PROGRAM</b>	<b>PHASE</b>	<b>COST</b>
	C.5.1 <i>Monitoring Program for Sustainable Tourism</i> to establish a monitoring system for Bohol tourism adopting the concept of Limits of Acceptable Change (LAC) as the strategy for defining carrying capacity.	2007-2008	450,000
	C.5.2 <i>Restoration of Selected Priority Heritage Structures</i> to restore ecclesiastical structures of high heritage value presently in varying stages of deterioration for use in religious ceremonies and as a tourism resource.	2007-2014	19,500,000 (per structure)
	<i>Diocese of Tagbilaran (Immaculada Conception Parish Church, Baclayan; Nuestra Señora de la Luz Parish, Loon, Assumption of our Lady Parish Church, Dauis; Santa Cruz Parish Church, Maribojoc; Santisima Trinidad Parish Church, Loay; San Isidro Labrador Parish, Tubigon; Other Churches needing immediate restoration and rehabilitation work OR Diocese of Talibon (Santisima Trinidad Parish, Talibon; other churches needing immediate restoration)</i>		
	C.5.3 <i>Restoration of Pipe Organ-Church Bells-Mural-Painting-Retablo Genres in Tagbilaran and Tubigon</i> to restore ecclesiastical artifacts of high heritage value presently in varying stages of deterioration for use in religious ceremonies and as a tourism resource.	2007-2014	3,600,000 (per building/ component grouping)
	C.5.4 <i>Rehabilitation of Church Museums and Museum Objects in Tagbilaran and Tubigon</i> to restore ecclesiastical structures of high heritage value presently in varying stages of deterioration for use in religious ceremonies and as a tourism resource.	2007-2014	6,000,000 (per museum and museum objects- component grouping)
	C.5.5 <i>Construction of Boardwalks, Museums and Viewing Facilities in Archeological Sites</i> located in Mabini, Guindulman or Anda Peninsula to protect the sites.	2007-2012	17,500,000 (per boardwalks, museum and viewing facilities grouping)
	C.5.6 <i>Rehabilitation of the Carlos P. Garcia Museum in Tagbilaran</i> to stem its growing deterioration and protect its collection of high value artifacts.	2007-2011	4,000,000 (per museum & museum objects- component grouping)
	C.5.7 <i>Fabrication and Installation of Markers and Signages for All Heritage Sites</i> to provide information about the historical and cultural significance of heritage sites in a systematic and integrated manner.	2007-2011	300,000 (per signage/ marker/board)
<b>SUB-TOTAL</b>		<b>51,350,000 per*</b>	