



## DDPKaRoMa Ecotourism Value Chain Analysis

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### Abstract

*Ecotourism sustainability has become an important part of government plans and policies. Its contribution to the socio-economic growth and development is recognized to have brought prosperity and higher standards of living to people. This study analyzed the ecotourism value chain in DDPKaRoMa Growth Corridor utilizing the tourism value chain model of Gollub (2004). Percentage and weighted mean were used to determine the rate of tourist inflow. SWOT analysis, FGDs and mapping workshops were conducted to obtain needed information from government offices and private entities. As a result, constraints and opportunities of the chains were identified, critical entry points for equitable intervention design and actions were recognized and understanding of the chain linkages and functions were generated. Analysis of tourism circuits showcase ecotourism products and services of the Corridor around a specific interest known as the eight themes identified for the purpose of developing DDPKaRoMa ecotourism packages. It is recommended that promotion and marketing of ecotourism products and services, capacity building and improvement of the skills of tourism service providers and frontline workers all throughout the chain be given utmost priority so as to attain ecotourism sustainability in this part of Mindanao.*

**Keywords and Phrases:** *Ecotourism value chain analysis, tourism package, tourism circuit, value chain, ecotourism products and services*

### Introduction

Tourism industry has emerged as the largest business sector in the world economy generating more than US\$ 3.6 trillion in economic activity employing over 200 million people which accounts for one in every 12 jobs worldwide (Intel, 2003). In 2009, it spawns 8.2 per cent of all employment or 235 million people across the globe generating 9.4 per cent of world's GDP. This contribution of tourism to economic growth and development is recognized to have brought prosperity and higher standards of living to many people throughout the world. Thus, its sustainability has become an important part of government plan and policies worldwide, including the Philippine government whose tourist arrivals grew at an average of 4.9 per cent per annum, registering over 8.9 million international tourists in 2009 (Torres, 2010).

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In the western part of the Philippines lies the DDPKaRoMa (Dapitan City, Dipolog City, Polanco, Katipunan, Roxas and Manukan), a promising ecotourism spot in the Province of Zamboanga del Norte, created by virtue of Republic Act 7916 or The Special Economic Zone Act of 1995. DDPKaRoMa accounts for roughly 6.75% biodiversity, acquiring a competitive advantage in the natural resources needed for the development of ecotourism. Being identified as the Growth Corridor for agri-industry development and eco-cultural tourism, DDPKaRoMa is considered as the economic drivers to create opportunities for local employment and decent jobs in the Province.

The increasing number of tourist arrivals in the province delivers implicit effects to the commercial activities in the Corridor. New business establishments provided employment to local workers. Thousands who are not directly connected with tourism benefitted from it -- like the tour operators and tour guides, the drivers and porters, the carpenters who build hotels and resorts as well as the farmers and fishermen who supply food to bars and restaurants.

The totality of tourist experiences in the DDPKaRoMa Growth Corridor encompasses a range of quality services rendered and tourism products afforded by various value chain components from marketing and advertising, boundary services such as baggage handling and transportation, to accommodation, to food and beverages and restaurant, and to activities and attractions. The profitability of the Corridor depends to a larger extent on how the various activities in the value chain are managed. Failure to provide an excellent and worth remembering experiences at any point may destabilize the whole experience; which may result in the obliteration of the competitiveness of the destination. The synchronization of the different components is imperative for the ecotourism industry in DDPKaRoMa to be competitive and sustainable.

Understanding capabilities of ecotourism value chain components in DDPKaRoMa Growth Corridor and the needs of prospective tourists are crucial. The research team deems it indispensably to analyze the ecotourism value chain of the Corridor. The identification of the nature of constraints confronting the Corridor requires a meticulous appraisal of the role of each value chain component in the entire experience, its linkages to other sectors, as well as the efficiency and effectiveness of tourism service and product providers.

Particularly, with the important role of ecotourism in the global, national and local economy and the community, along with DDPKaRoMa's niche position in ecotourism, By knowing the position of DDPKaRoMa service and product providers within this value chain, activities that are more or less critical to achieve a competitive advantage can be identified paving the way towards a sustainable ecotourism in this part of Zamboanga del Norte. Moreover, eco-cultural tourism potentials of DDPKaRoMa such as showcasing indigenous culture and tradition in the Subanen Villages and promoting ecotourism destinations such as the Libuton Cave could be maximized. Hence, this study is conducted.



## Objectives

This study aimed at analyzing the ecotourism value chain in DDPKaRoMa, Province of Zamboanga del Norte during the Calendar Year 2009 – 2010. Specifically, it sought to:

1. Identify the potentials and constraints in the value chain components of the Corridor; and
2. Determine critical entrée points for equitable action design and actions.

## Framework

Value chain analysis (VCA) is a powerful tool in identifying the key activities which form the value chain. Based on the concept of Gollub, et. al. (2004) value chain model, ecotourism activities are broke down according to the activities as shown in the framework (see Fig. 1). The tourism value chain model of Gollub, et al. has three (3) stages.

**Stage 1 - Prior to Destination.** The main services provided are marketing, which deals on the promotion and selling the destination; information about the destination and bookings, which involve the buying of the ecotourism product. The tour operators and travel agents aggressively function at this stage.

**Stage 2 - At Destination.** Ecotourism products and services are offered in this stage. The key services provided are accommodation, food and attractions and inbound activities. The products can be destinations like natural or cultural sites, a theme park, a historical attraction, an event, etc. This is where the lodging and catering sectors participate, as well as travel agents in case of prearranged experiences.

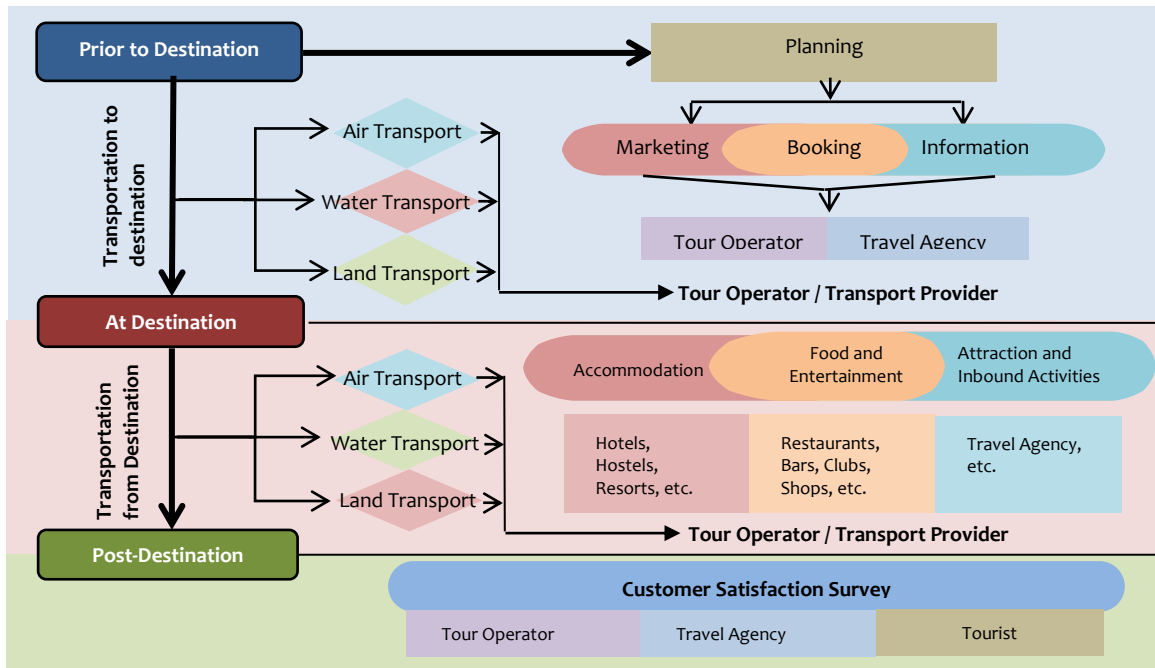


Figure 1 Value Chain Framework (based on the concept of Gollub, et. al 2004)

**Stage 3 - The Post-Destination.** The final stage of the chain where tourist satisfaction is evaluated with the intervention of the ecotourism products providers. A common feedback strategy from the tourists is administering a tourist satisfaction survey about the quality of service and their experience while at the seat. This stage basically measure tourist contentment so as to take required corrective action to ensure that the tourism value chain is managed in a smooth manner.

## **Methodology**

The Qualitative-descriptive method of research was used in this study. Percentage and weighted mean were used to determine the rate of tourist inflow. Utilizing the concepts of VCA, the project team undertook the following activities.

**Secondary Data Collection.** Field data were obtained through enumerators specifically identified for this study to ensure reliability on the results of the value chain assessment. The supplementary information were obtained from the concerned government offices and private entities which include domestic and international tourist arrivals and profile from the year 2005 to 2010; access-related information that covers about roads, terminals, and infrastructure; hotels, pension houses, lodging houses, restaurants, souvenir shops, attractions, and information on ancillary services.

**Primary Data Collection Utilizing Focus Group Discussion (FGD).** A participatory approach was also employed in this endeavor which various stakeholders from the local government and private industries converged and participated in the alliance-wide workshops and focused group discussions (FGDs). These activities were intentionally designed and conducted to generate data and other pertinent information direct from the stakeholders and to supplement the secondary data obtained from the available documents from the local government units and private industries like the master and developments plans, local development plans and socio-economic profile which are consequently collated to come up with a tourism profile.

**SWOT Analysis.** This was conducted to determine the Corridor's Strengths and Weaknesses, and for identifying both the Opportunities open and the Threats it faces. SWOT Analysis helps uncover the Corridor's opportunities that are well placed to exploit and by understanding the weaknesses, threats will be managed or eliminated.

**Identification of LED Priority Investment Programs for Ecotourism.** This was intended to identify priority Local Economic Development (LED) projects and investment programs related to the different aspects of the supply-demand chain, support infrastructure and the required institutional support. The same service providers and stakeholders of the ecotourism industry including national government agencies and financial institutions were invited in this activity. The output of this is a compendium of project profile to support the ecotourism industry.

**Validation of Findings and Consensus with Stakeholders.** It is designed for validation and consensus building on the findings and recommendation of the study with the value chain participants.



## Results and Discussion

**Trends Tourist Arrivals in DDPKaRoMa.** Table 1 shows the tourist arrivals in Dapitan and Dipolog for the previous years and their share of the regional total. While the regional total declined by around 3,500 visitors from 2007 to 2008, visitors in Dapitan increased by around 2,900 in the same period. Similarly, regional tourist expenditures decreased as a result of decreased tourist arrivals, tourist expenditures in Dapitan increased by 6 percent for the same period.

The table also reveals very encouraging tourist arrival situation in the twin cities of Dapitan and Dipolog. The first quarter 2010 data on tourist arrival in Dipolog reveal that it is already 71 percent of the total annual tourist arrival of 2009. If the trend will continue for the rest of 2010, then it is expected that Dipolog City will have an estimated increase of around 184 percent compared to 2009.

Similarly, Dapitan City is performing relatively well. The first quarter tourist arrival data of the city indicate that it is already 51 percent against the total tourist arrival in 2009. If the trend will continue up to the end of the year, then Dapitan City is expected to have around 103 percent increase in tourist arrival in 2010 against the 2009 figure. Interestingly, the most number of foreign tourists in Dapitan came from the USA, followed by Germans and Australians.

In Dipolog City, the most number of foreign tourists came from the USA too, followed by Indians and Australians followed closely by Canadians. While the Indians are closely associated with business trips, the other foreign tourists are more on leisure trips. Thus the tourism industry in DDPKaRoMa offers a tremendous potential for further development.

**Table 1 Domestic and International Tourist Arrivals in Dapitan and Dipolog 2005-2008**

Region/ City	2005	2006	2007	2008	2009	2010a
Dipolog	NA	NA	52,670	47,108	21,876	15,521
Dapitan	NA	NA	47,700	50,567	33,867	17,155
TOTAL (Dipolog & Dapitan)	NA	NA	100,370	97,675	55,743	32,676
Region IX	439,258	507,349	537,775	534,303	238,384b/	62,940c/
% Share to Region	NA	NA	18.66%	18.28%	23.38%	

**Source:** DOT IX

a/ Jan-March only.

b/ Only includes the cities of Dapitan, Dipolog and Pagadian.

c/ Only includes the cities of Dapitan, Dipolog and Pagadian. Pagadian data are for January and February only.

### ***DDPKaRoMa Value Chain Potentials and Constraints***

***Marketing Agencies.*** There are lots of marketing agencies available in DDPKaRoMa ranging from radio, newspapers and other print media, travel and tour agencies, websites and television networks.

***The Stigma on Unstable Peace and Order Situation in Mindanao and Zamboanga Peninsula Areas.*** Because DDPKaRoMa is located in Mindanao specifically in Zamboanga Peninsula, the Corridor's image is stained by bombings and armed clashes between lefties and the government which diminishes international and domestic tourist interests. Foreign tourists as well as those domestic tourists not residing in the Corridor discern the place as dangerous to visit because of the unsteady peace and order situation in this part of the Philippines. Currently, majority of the tour operators and private sectors in the Corridor are unable to engage in marketing to address these issues.

***Poor Endorsement of DDPKaRoMa Ecotourism.*** Government offices like DOT, MTC and CTC and promotional services such internet, television, radio and print media are present in DDPKaRoMa; however no assiduous and constant promotion of the Corridor are made. Lots of the marketing activities of tour operators in DDPKaRoMa are still based on personal contact. Dapitan City and Dipolog City supply brochures and other print ads and utilized websites for online marketing.

Apart from travel agencies and tour operators do not offer online booking, no DDPKaRoMA Travel Guide Books, maps and other IECs are featured in any marketing platforms. Tourism products in DDPKaRoMa are also not packaged at all. Promotion and marketing of individual hotels, lodges and resorts is also disjointed, and not in coordination with travel agents and service providers. This supplemented boundaries for product development and marketing of the Corridors subsequently limiting the Corridor's capacity to penetrate the global tourism markets.

#### ***Transportation***

***Air.*** There are two airline companies operating at Dipolog Domestic Airport: one is Philippine Airline and the other Cebu Pacific at competitive rate. Those who are traveling for Cebu City and back, Cebu Pacific Air is operating three (3) times a week while Philippine Airlines' PAL shall operate back in the future after some arrangements with concerned offices.

The quality of airport infrastructure and services need to be improved. Aside from there is no regular air traffic, the length and quality of runways in Dipolog Airport are significant turn-offs for tourists. The airport also lacks advance navigational equipment for night landing restricting the time window for flight arrivals that Cebu Pacific and Philippines Airlines can only afford service during daytime.

***Water.*** In the City of Dapitan where the wharf is situated, there are a number of trips bound for Dumaguete City, Negros Oriental, Bohol, and Cebu City. Everyday, 2 fast



ferries, 2 slow boats and 2 RORO trips area available for tourists from Dumaguete and back. On the other hand, the fast craft which travel s from Cebu to Dapitan and back passes by the port of Tagbilaran, Bohol and the city of Dumaguete and takes the same route back everyday, so long as the weather warrants safety in sea travel. Access by sea is weather-dependent. There are no passenger vessel functions during typhoons. They have safety standards in place and monitoring mechanisms to ensure compliance; but occurrence of an accident due to negligence may further undermine DDPKaRoMa's image as a safe leisure destination.

*Land.* Land transportation system offers services that transport tourists and other visitors from the point of entry to their desired point of destination. In the Cities of Dapitan, Dipolog, Polanco, Katipunan, Roxas and Manukan a number of van, multicabs, motorcabs and motorcycles are operating of which 2863 are for hire. There is one Minibus Company operating from Dapitan to Dipolog and back and 2 bus companies operating in Dipolog City which caters long distance travels from the city to as far as Cagayan de Oro City and Zamboanga City as well as other desired points of destination.

Seven (7) passenger vessels and two (2) big bus companies from Dipolog Terminal to Zamboangaand and to Cagayan, vice versa are operating daily. Some land transport systems are untidy, risky and uncomfortable. National highways and roads in DDPKaRoMa are in good condition but concrete, asphalted roads in some tourist destinations especially in far-flunged areas like Miatan and Libuton are absent. The concretization of road to the famous Dakak Park and Beach Resort is on going.

***Landing and Passenger Handling.*** DDPKaRoMa is a junction area which connects transportation facilities from the southwestern part of Mindanao to the Northeastern portion. Dipolog City operates airport and an integrated bus and jeepney terminal which is located at the southern part of the Poblacion. Pulauan Wharf located in Dapitan City and the Katipunan Roro port recently begins operating. Various porters and drivers associations are present in Dipolog and Dapitan Cities. Ground handling and tourist transfer are handled by porters or directly by hotel dispatchers who assist the tourist during landing and luggage handling. One of the comparative advantages of DDPKaRoMa is the capability of porters and local communities to speak Cebuano, English and Tagalog languages.

*Landing.* Baggage handling delays are issues because receiving areas in Dipolog Airport is narrow. No information and communication services like internet are available in air and seaport and bus terminals. Some tourists expressed dissatisfaction with the schedule, availability, punctuality, and reliability of services offered by domestic transports.

*Handling.* With regards to other aspects like “meet” and “greet, portorage and tourist transit services, ground handler is commendable; however, for many, quality of service remains poor and untrustworthy. Reports of loss of baggage and pilferage, especially for connections points via DDPKaRoMa are not unusual and naturally detract from the tourist experience.

There is also no specific cab rate from the airport, wharf, and terminals to highway and other destinations. Some porters/drivers overprice. International and domestic tourists going to DDPKaRoMa could take a tricycle, motorbike, cab, van or transports prepared by hotels. From Dipolog Airport to hotels in Dipolog, the fare rate for tricycle is P 7 to P 10. However, tricycle drivers opportunely impose fare more than the rate fixed. This creates confusion, and inconvenience on the tourists. Reports of loss of baggage and pilferage, especially for connections points via DDPKaRoMa are not unusual and naturally detract from the tourist experience. Poor portorage service in airport/seaport/terminal is also prevalent. This harassment causes significant inconveniences to the tourists and projects a first bad impression of the Corridor. Overpricing and resulting harassment by porters often destabilize tourist's travel experience.

### ***Accommodation***

*Hotel/Resorts and Services.* The total supply in the Corridor is estimated at 2000 beds in 900 rooms in some 50 hotels and lodges. Hotel accommodation along DDPKaRoMa is cheaper but good quality service is limited. Only few are able to meet the demands of an elegant international tourist. Of these, only a few like Dakak Park and Beach Resort and Camilla, among others meet international quality standards. Upscale international accommodation is predominantly offered in these establishments while the limited number of mid-range accommodation available is mainly in business centers. The standards and types of services and amenities offered differ significantly.

Most accommodations in DDPKaRoMa have fewer than 10 rooms, with over 50 establishments. This inadequate supply is characterized by majorly small lodging houses of which quality of services levels vary widely. These constraints restricted tour operator's ability to organize travel packages for larger tourist groups.

In Dapitan, Dakak Park and Beach Resort can accommodate groups and to some extent packaged tours that can accommodate about 200 guests per night. But in Dipolog City and the four (4) municipalities composing the Corridor can only accommodate a mean of 20 – 40 tourist maximum tourists, in the same establishment for the same price. To accommodate groups greater than 40, tour operators need to split groups into respective number of hotels, of which quality of service would vary. Poor customer service, power interruption and water shortage problems also undermine tourist experiences.

*Ancillary Services/Amenities.* Tourist expenses on ancillary services and amenities play vital part in DDPKaRoMa economy. In Dapitan and Dipolog Cities, local communities provide rental boats for diving, sailing and adventure. Some also began escorting tourists to attractions. In Dakak, Subanen dances are performed during or after dinner. As tourists move westwards of the Corridor, especially in Polnaco, Katipunan, Roxas and Manukan, the quality of tourism products diminishes.

Day touring to places of interest is a popular activity for tourists that stop over in destination. However, this also possesses constraints. Availability or accessibility of





support services like banking and communications can sometimes be problematic. Lack of marketing gimmick is also perceived as constraint in this chain.

***Attractions and Inbound Activities.*** DDPKaRoMa is the cradle of rich history and distinct culture that share important segment in Philippines chronicle. Apart from Dapitan City is a haven of Rizal's place of exile, It recognize the early settler of the place, the Subanen, by establishing village of the latter's affluent ethnicity. Aside from favorable climate, increasing tour operators, potential diving and sports/fishing areas, and rich aquamarine products, available high-valued and exotic tropical fruits, the proximity of the Corridor to BIMP-EAGA, Visayas is also a comparative advantage.

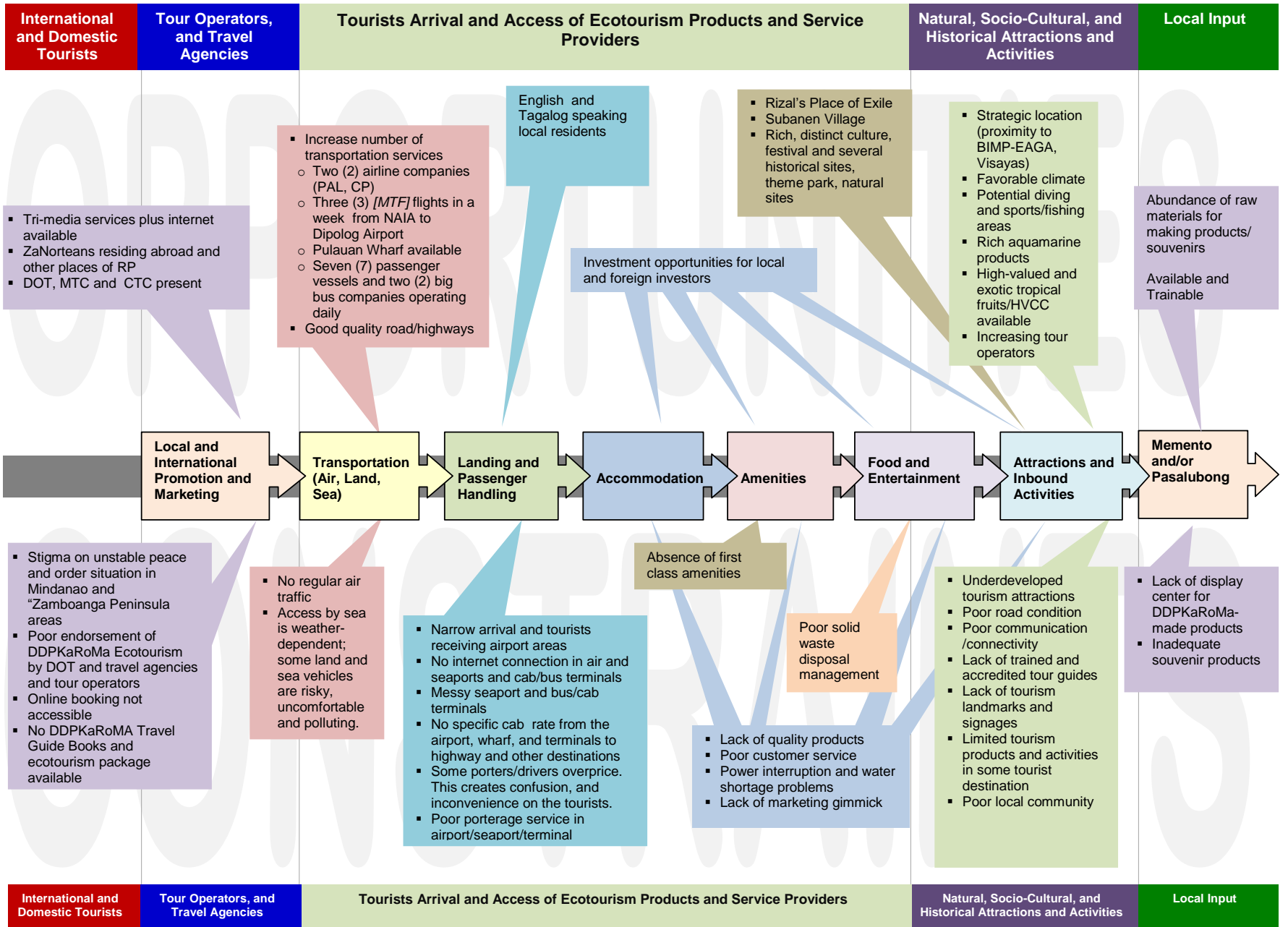
After the mapping of supplies, it was found out that a great number of attractions, events, and important heritage sites in DDPKaRoMa appear to have been neglected. Tourism landmarks and signages also lacks, with a limited tourism products and activities in some tourist destination

The Libuton Cave and Miatan falls are not given considerable priority. Concise, rigorous systems that guarantee the development and restoration of historic monuments and sites like Rizal house in Talisay and Ilihan Hill is deficient thereby deteriorating tourist experience. With all these, the need for integrated plan for developing and managing the destination is suggested.

In DDPKaRoMa, town trips are possible, but there is not much content to show to the tourists. In fact, some of the places in the Corridor are underdeveloped and connected with rough roads. The accommodation, guides and other services like communication/connectivity are poor in quality.

***Memento and/or Pasalubong .*** Raw materials for making local products/souvenirs are abundant but some creations characterizing DDPKaRoMa brand are not of so good in quality.

## DPPKaRoMa Ecotourism Value Chain: Opportunities and Constraints





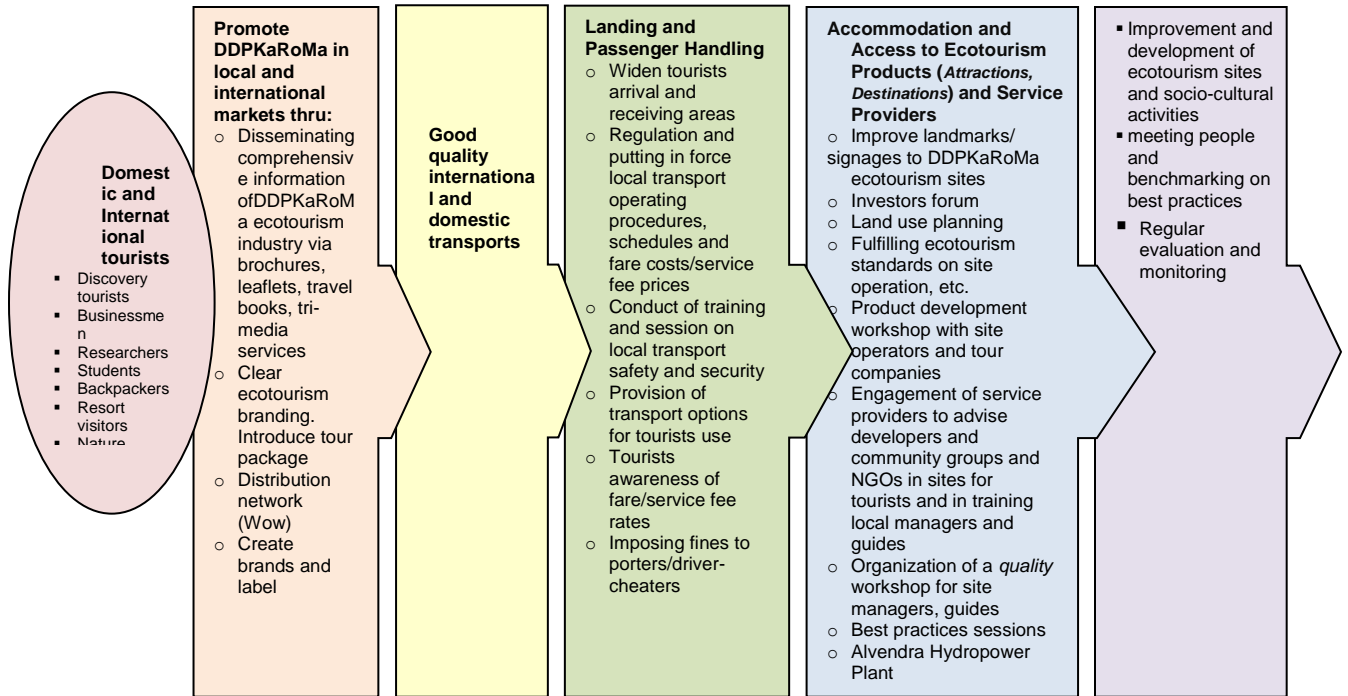
**Proposed Policies, Strategies and Interventions**

The role of ecotourism in alleviating poverty by attracting foreign investments towards creating employment opportunities and sustaining economic stability cannot be overemphasized. DDPKaRoMa can absorb and benefit from the positive effect it brings by protecting and conserving the natural resources while showcasing and enriching history and culture of the local community. The economic benefits from this sector can have potential turn-off by downbeat ecological and negative socio-cultural impacts, which should be addressed and reduced through planning, policy formulation and advocacy. Capability trainings, transfer of knowledge and technology, accessibility to financial and voluntary mechanisms as well as linking with local communities, are vital to lighten these setbacks.

For the ecotourism in DDPKaRoMa to become sustainable, an integrated open-ended process engaging LGUs, academe, public and private sectors; NGOs/NGAs and local communities, should be recognized. Optional guidelines and simple codes of conduct should be moved gradually into obligatory regulations. To improve the quality of ecotourism products and services, effective evaluation tools for controlling and monitoring ecotourism activities, along with other instruments, such as certification and accreditation should be pushed through and be strengthened.

**Value Chain Enhancement Program and Priority LED Projects**

Local Economic Development (LED) Projects for DDPKaRoMa should focus on strengthening capabilities along the entire value chains. Shown in Figure 3 is the recommended value chain enhancement program



**Figure 3 Value Chain Enhancement Programs**

***Development of Marketing and Promotional Activities and Materials.*** It cannot be overemphasize that tourists are the soul of tourism industry. Their choices and preferences would dictate the path for the sector. The tourist preferences will be greatly influenced by publicity and media. In DDPKaRoMa, there are many suppliers of ecotourism with infrastructure for visitors in communities, but the tourist still do not reach all of them because of the lack of promotion and representation of the destination.

To leverage increases in tourist arrivals, DDPKaRoMa Project Management Office (PMO) should push through aggressive joint marketing and collaboration between neighboring provinces like Bohol and Dumaguete or neighboring countries. Promotional and communication material on the country, including maps, schedules of events and country data, post cards, and online promotion marketing techniques.

***Creation and Operation of DDPKaRoMa Ecotourism Website and Database.*** Internet can be an excellent marketing channel to promote ecotourism in DDPKaRoMa in a clean and cheap way reaching out millions of computer users. Tourism circuits, link of travel agent and tour operator website, list of transportations by land, by sea or by air, records of accommodations, food and entertainment, attractions and inbound activities and souvenir shops and contacts should be included in the webpage. DDPKaRoMa Database should also be developed, to include a broader cross section of tourist, tour operators and media. Information in the website and database should be updated regularly.

***Development of DDPKaRoMa Ecotourism Travel Planner.*** Develop clear, concise information on DDPKaRoMa Ecotourism for use by the travel trade in their efforts to develop their wholesale programs in the Corridor. This information will also be used on the DDPKaRoMa website. Examples of information that will be included are DDPKaRoMa background and history; easy to re-produce text and photos; tourism circuits by air, water, land; and maps.

***Tourist Arrivals Inventory.*** Undertake further market research to monitor the exact number of tourist receipts in DDPKaRoMa. This shall also include tourist by country/place of origin, purpose of tourist visit, length of stay, as well as key market and product segments for the Alliance marketing.

***Transportation and Landing and Passenger Handling.*** Access troubles are limiting growth of tourism in DDPKaRoMa. The combination of poor baggage handling, quality of flights and trips, substandard road infrastructure and ground transportation services hinder the Corridor from further development. The following are the recommendation to enhance the value chain of the Corridor: widen tourists arrival and receiving areas, regulation and putting in force local transport operating procedures, schedules and fare costs/service fee prices, conduct of training on quality air, water and land transport services and local transport safety and security, and establish monitoring systems to measure performance and progress in service quality improvements.

***Accommodation, Amenities/Ancillary Services, and Attractions.*** In light with the constraints in accommodation and services section, the following recommendations are



hereby offered: improve landmarks/signages to DDPKaRoMa ecotourism sites, product development workshop with site operators and tour companies, service and product providers and tour guides trainings, benchmarking on best practices and attending conferences, conduct feasibility study for Alvendra Hydropower Plant operation, improvement and development of ecotourism sites and socio-cultural activities and regular evaluation and monitoring

Hotels and pension houses as well as infrastructure development and services that are developed should be controlled and carefully managed. The construction of lodges and infrastructure must be environmentally sound. In order to attract tourist, they must be supported with infrastructure such as roads and water supply to facilitate the access.

Hotel industry should be encouraged to work jointly with tour operators, airlines and transport operators, public agencies on short-term marketing programs to increase occupancy and lengthen the tourism season by diversifying tourism product and market. This could be achieved by setting up a joint action group like consortium for marketing and promotion.

Tour operators are reliant on the quality and safety of the destination. They can respond to changing market trends in DDPKaRoMa by placing increasing emphasis on locally sourced services, food and drinks, richer excursion and activity programs. While investors and developers, hotel and resort management companies and managers and can identify ways of working together to enhance the quality of the destination, they and the local community gain.

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