



NATIONAL ECOTOURISM STRATEGY AND ACTION PLAN 2024-2028



Final Draft

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Executive Summary

The National Ecotourism Strategy and Action Plan (NESAP) 2024 – 2028 builds on the successes of its predecessor plans and in line with the administration's strategic agenda, which is anchored on Ambisyon Natin 2040, supported by NEDA's Philippine Development Plan (PDP) 2023 - 2028, the Department of Tourism's (DOT) National Tourism Development Plan (NTDP) 2023 - 2028, and the Department of Environment and Natural Resources (DENR) 7-point Agenda.

Ecotourism in the Philippines is a rapidly evolving subsector that continues to shape discourse and practice. Rooted in the conservation of nature and culture, ecotourism in the country is defined by five distinguishing features: conservation, reinvestment in resources, sustainability, ethical practices, and education about biodiversity and cultures. These principles are reflected in the National Ecotourism Strategy and Action Plan (NESAP) 2024 – 2028, which aims to profile and assess the current state of ecotourism in select areas.

Summary of Issues and Concerns:

- **Lack of Infrastructure:** Many ecotourism sites suffer from inadequate infrastructure and limiting accessibility.
- **Limited Funding:** Both government funding and private investment in the ecotourism sector are insufficient, hindering development and maintenance efforts.
- **Unsustainable Tourism Practices:** Some tourism operators and visitors engage in unsustainable practices, such as overfishing, littering, and damaging natural habitats, which can harm the environment and threaten the long-term viability of ecotourism.
- **Limited Awareness and Education:** Many Filipinos are unaware of the importance of ecotourism or how to engage in sustainable tourism practices. This limits the potential for ecotourism to generate positive economic, social, and environmental impacts.
- **Conflicting Interests:** Conflicting interests between tourism stakeholders, local communities, and conservation groups can lead to disputes over land use, resource management, and tourism development

- **Climate Change Impacts:** Climate change poses a significant threat to the Philippines' biodiversity and natural resources, which are critical to the success of the ecotourism sector.

Development Framework

Considering the aforementioned issues and concerns, the NESAP 2024-2028 emphasizes the improvement of stakeholder engagements at all levels and the involvement of more sectors in the development of ecotourism. In line with the NTDP 2023–2028, the NESAP 2024–2028 provides equal opportunities for marketing and product development. Circuit development and activities like the DOT's flagship Philippine Experience Program should stress the inclusion of ecotourism and cultural destinations to create buzz and interest in more stakeholders.

NESAP 2024-2028 also highlights the adoption of international innovations that foster sustainable development such as the monitoring and evaluation framework espoused by the United Nations World Tourism Organization (UN Tourism) International Network of Sustainable Tourism Observatories (INSTO)¹. Given that ecotourism is heavily affected by climate change and the natural hazards that come with it, resilience should be an important element of the development framework. This includes the development of disaster-resilient infrastructure, the implementation of emergency response plans, and the promotion of visitor safety protocols. Visitor management strategies are also underscored, focusing on minimizing the environmental impact of tourism activities through controlled access, capacity limits, and the promotion of responsible tourism practices. These measures are crucial for preserving the natural and cultural integrity of ecotourism sites while ensuring the safety and satisfaction of visitors.

VISION AND PROGRAMS

The Philippine ecotourism development framework aims to harmonize economic growth with environmental conservation and community well-being. By adopting sustainable practices and actively involving local communities, the country aspires to build a responsible tourism industry that protects its natural and cultural heritage for the future while providing income and employment opportunities. This framework is structured using the logical framework approach, encompassing goals, objectives, outputs, and activities while aligning with global commitments to sustainable development and biodiversity conservation, to which the Philippines is dedicated.

VISION

The vision of ecotourism development in the Philippines is to transform the country into a globally competitive ecotourism destination, leveraging its abundant natural beauty and cultural richness. This involves a commitment to conserve, enhance, sustain, and develop these assets while ensuring the equitable sharing of benefits among its people.

¹ "The UN Tourism International Network of Sustainable Tourism Observatories (INSTO) is a network of tourism observatories monitoring the economic, environmental and social impact of tourism at the destination level. The initiative is based on UN Tourism's long-standing commitment to the sustainable and resilient growth of the sector through measurement and monitoring, supporting the evidence-based management of tourism" – UN Tourism. (<https://www.unwto.org/sustainable-development/unwto-international-network-of-sustainable-tourism-observatories>)

STRATEGIC OBJECTIVES

Taking into consideration the national policies for development to achieve the country's collective long-term aspiration under the NEDA's Ambisyon Natin 2040, as adopted under the PDP 2023-2028, the NTDP 2023-2028 and the DENR's 7-point agenda, the Philippine framework for ecotourism development under the NESAP 2024-2028 outlines seven (7) strategic objectives, namely:

- Strategy 1. Develop and market multidimensional and competitive ecotourism products anchored on Filipino culture and values.
- Strategy 2. Develop and manage resilient and climate change-responsive infrastructures and mechanisms for ecotourism sites.
- Strategy 3. Promote ecotourism investment, sustainable financing, and digital transformation.
- Strategy 4. Maximize environmental, economic, and socio-cultural benefits to the host communities.
- Strategy 5. Promote a culture of ecotourism and establish partnerships.
- Strategy 6. Strengthen institutional capacity and ecotourism governance.
- Strategy 7. Monitor outcomes and impacts.

The actions under each strategic objective are clustered into thematic programs that will deliver outputs that contribute to achieving the vision.

Strategy 1 is about the development of better products that the market will buy. The programs on “ecotourism standards and accreditation” and “product and market development” will ensure that the Philippines will offer globally competitive and market-sensitive products. Actions under the “Market and Promotions” Program will ensure that these products are communicated to a wider target market.

Strategy 2 pertains to actions toward resiliency. It includes programs on “visitor and site management,” the mainstreaming of the “culture of safety” in ecotourism sites, as well as the adaptation of disaster risk management and climate change mitigation” principles and practices. Supporting these programs, is the continuation of the “development of infrastructure that improves connectivity and accessibility”.

Strategy 3 refers to programs that will encourage investments in ecotourism by providing “incentives” and sources for possible “sustainable financing”. Investments should also include projects that value digital transformation.

Strategy 4 assures that host communities benefit from ecotourism investments by providing “capacity-building” and “enterprise development” programs.

Continuing the element of mainstreaming the culture of ecotourism through education and partnership is Strategy 5. These are actions under the programs of “education and advocacy”, “stakeholder engagement through partnership and linkages”, and “domestic and international network building”.

Sustaining ecotourism development requires an improvement of the institutions that govern ecotourism (Strategy 6), and its monitoring and evaluation systems (Strategy 7). The 6th Strategy includes actions that enhance “ecotourism policies,” including its institutions and other “support

programs". As good as a plan may be, there is a need to boost "impact assessment" and "monitoring tools", as included under Strategy 7, to ensure that ecotourism is hitting the right targets.



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List of Acronyms

ASEAN	Association of Southeast Asian Nations
AVP	Audio-Visual Presentation
BDFE/s	Biodiversity-friendly Enterprises
BIMP-EAGA	Brunei Darussalam–Indonesia–Malaysia–Philippines East ASEAN Growth Area
BMB	Biodiversity Management Bureau
BPKMD	Biodiversity Policy and Knowledge Management Division
CAGR	Compound Average Growth Rate
CBD	(UN) Convention on Biological Diversity
CEPA	Communication, Education, and Public Awareness
CNH Tours	Cultural and Natural Heritage Tours
COVID-19	Corona Virus Disease 2019
CSOs	Civil Society Organizations
DENR	Department of Environment and Natural Resources
DepEd	Department of Education
DICT	Department of Information and Communications Technology
DILG	Department of Interior and Local Government
DND	Department of National Defense
DOF	Department of Finance
DOLE	Department of Labor and Employment
DOST	Department of Science and Technology

DOT	Department of Tourism
DPWH	Department of Public Works and Highways
DRRM	Disaster Risk Reduction and Management
DTI	Department of Trade and Industry
EIA	Ecotourism Impact Assessment
EMP	Ecotourism Management Plan
EO	Executive Order
ER	Energy Regulation
ESF	Ecotourism Statistics Framework
ETWG	Ecotourism Technical Working Group
F&B	Food and Beverage
FCCC	(UN) Framework Convention on Climate Change
FGDs	Focus Group Discussions
GDP	Gross Domestic Product
GSTC	Global Sustainable Tourism Council
IMARC Group	International Market Analysis Research and Consulting Group
INSTO	International Network of Sustainable Tourism Observatories
IPAF	Integrated Protected Area Fund
IPRA	Indigenous Peoples' Rights Act
JSPS	Japan Society for the Promotion of Science
KBAs	Key Biodiversity Areas
KII/s	Key Informant Interview/s
KM/GBF	Kunming-Montreal / Global Biodiversity Framework
LGC	Local Government Code
LGU/s	Local Government Unit/s
LTDP	Local Tourism Development Planning
MEA	Multilateral Environmental Agreements
MSME/s	Micro, Small, and Medium Enterprise/s
NAS	National Accreditation System
NBSAP	National Biodiversity Strategy and Action Plan
NCCA	National Commission for Culture and the Arts
NCCP	National Climate Change Action Plan
NCIP	National Commission on Indigenous Peoples
NCP	Nature's Contributions to People

NEDA	National Economic and Development Authority
NEDC	National Ecotourism Development Council
NEP	National Ecotourism Program
NEPAP	National Ecotourism Program and Action Plan
NES	National Ecotourism Strategy
NESAP	National Ecotourism Strategy and Action Plan
NESC	National Ecotourism Steering Committee
NGO/s	Non-Government Organization/s
NHCP	National Historical Commission of the Philippines
NIPAS	National Integrated Protected Areas System
NM	National Museum
NTDP	National Tourism Development Plan
OTDPRIM	Office of Tourism Development Planning, Research, and Information Management
P/TPB	Philippine/Tourism Promotions Board
PA/s	Protected Areas
PAS	Progressive Accreditation System
PBSAP	Philippine Biodiversity Strategy and Action Plan
PDP	Philippine Development Plan
PES	Payments for Ecosystem Services
PHP	Philippine Peso
PO/s	People's Organization/s
PPAs	Programs, Projects, and Activities
PPP/s	Public-Private Partnership/s
PSA	Philippine Statistics Authority
RA	Republic Act
REC/s	Regional Ecotourism Committees
RO/s	Regional Offices
SDG	Sustainable Development Goals
SLTSS	Standard Local Tourism Statistics System
SWOT	Strengths, Weaknesses, Opportunities, and Threats
TDPD	Tourism Development Planning Division
TEZ/s	Tourism Enterprise Zone/s
TIEZA	Tourism Infrastructure and Enterprise Zone Authority
TO	Tourism Office
TPB	Tourism Promotion Boards

TWG	Technical Working Group
UN	United Nations
UNWTO / UN TOURISM	United Nations World Tourism Organization
UP	University of the Philippines
WITS	Wi-Fi Internet Access in Tourist Spot



Introduction

1. RATIONALE

On 17 June 1999, Executive Order (EO) No. 111 was issued for ecotourism development in the Philippines. EO 111 called for the formulation of the National Ecotourism Strategy (NES) to provide the national framework for the development of ecotourism in the country contributing to the competitiveness of Philippine tourism in the global market. The main purpose of the NES is to develop and manage ecotourism sites and products that are distinctly Filipino and at par with world-class standards. In keeping with the intent of EO 111 and the subsequent national strategies, the National Ecotourism Strategy and Action Plan (NESAP) 2024–2028 has been formulated to provide holistic development and inclusive growth for the greater benefit of the country.

The NESAP, jointly formulated by the Department of Environment and Natural Resources (DENR) and the Department of Tourism (DOT) with inputs from the Ecotourism Technical Working Group (ETWG), is a plan to develop and mainstream ecotourism destinations, products, and services that are distinctive, genuine, and environmentally responsible. Similarly, the NESAP supports a systematic gathering of ecotourism statistics for policymaking and planning and determining the market and value of ecotourism to the nation.

Concluding the NESAP 2013-2022 coinciding with the new administration, policy and institutional changes have necessitated an update on the national ecotourism strategy. The new NESAP likewise requires realignment with the Philippine Development Plan (PDP) 2023-2028 and the National Tourism Development Plan (NTDP) 2023-2028. The current PDP highlights the government's priority thrusts to (a) make tourism globally competitive; (b) promote sustainable, inclusive, and resilient multidimensional tourism; and (c) intensify ecosystem protection, rehabilitation, and management using integrated and ecosystem-based approaches and nature-based solutions.² On the other hand, the new NTDP's strategy is anchored on the Filipino identity, sustainability, resilience, and competitiveness. Its strategic goals center on the development and improvement of tourism products that are diverse, and culturally enriched, and prioritize equal opportunities for destination development and promotion.³

² Philippine Development Plan, Sub-chapter 2.3. Establish Livable Communities, Chapter 7 Reinventorize Services, and Chapter 15 Accelerate Climate Action and Strengthen Disaster Resilience.

³ NTDP 2024 – 2028, Strategic Values, and Goals 3, 4, and 5.

In the formulation of the NESAP 2024-2028, ETWG members concurred to follow the duration of the PDP 2023 - 2028, the NTDP 2023-2028, and other national policies. Implementation-wise, it is also practical as the NESAP's period will coincide with the President's term.

The NESAP 2024-2028 addresses ecotourism as a viable tourism product. Hence, it delves into industry concerns such as investment promotion and financing, market research, trends, innovations, information, product development, market development, network building, marketing and promotion, research and development, institutional and human resource development, and infrastructure support. It will also specify the duties and responsibilities of national government agencies, local government units, the tourism sector, academia, and other industry players in the plan's execution.

The NESAP 2024-2028 aligns with the new administration's tourism objectives: (1) accessibility, (2) digitization, (3) better visitor experiences, (4) "equalization" of product creation and marketing, (5) multi-dimensional tourism, (6) domestic and international tourism maximization, and (7) tourism governance strengthening. It also aligns with the DENR's priority thrusts in environmental protection and biodiversity conservation.

With the intent of making ecotourism widely promoted down to the grassroots level, NESAP 2024-2028 seeks to actively engage the ecotourism stakeholders from local hosts and communities, and the private sector, effectively expanding the programs and strategies of ecotourism development to include privately managed sites and ecotourism destinations outside the protected areas.

1.1. PURPOSE AND OBJECTIVES OF THE PLAN

The National Ecotourism Strategy and Action Plan (NESAP) 2024-2028 outlines the collaborative priority programs, initiatives, and activities of ecotourism development. The plan specifies the institutional arrangements among ecotourism stakeholders and their roles and responsibilities in executing the strategy.

The idea is to establish a framework that will provide a holistic approach to ecotourism development with the following objectives:

- 1) Identify industry issues, bottlenecks, and gaps (e.g., access connectivity, products services, sustainability), including program delivery and implementation, as well as identification of legislative measures to promote ecotourism development;
- 2) Align strategic directions and initiatives with the new national tourism policy, national economic agenda, and environmental protection, conservation, and rehabilitation policies, as well as international and global ecotourism standards and trends;
- 3) Identify priority ecotourism destinations and products;
- 4) Develop ecotourism products that are at par with international quality standards;
- 5) Formulate appropriate strategies, programs, projects, and activities to address the gaps;
- 6) Establish domestic and international ecotourism networks and linkages;
- 7) Outline action programs to guide the development of the identified ecotourism sites and products;
- 8) Recommend measures aimed at strengthening tourism human resources;
- 9) Develop measures enabling institutional growth of ecotourism in the country;
- 10) Design the plan's monitoring and evaluation framework.

1.2. PLANNING PRINCIPLE, APPROACH, AND METHODOLOGY

Planning Principles. The NESAP 2024 – 2028 is guided by the strategic objectives of the NTDP 2023–2028 and is aligned with the DENR Comprehensive 7-Point Agenda. NESAP 2024–2028 highlights the strategic orientations, associated programs, and initiatives that must be undertaken to accomplish the vision and objectives of the ecotourism sector throughout its planning horizon. Following this, the following principles have been adopted to guide the planning process:

- Must be as inclusive as possible — all major stakeholders at the national government, local government units (LGUs), and private sector level, as well as local communities, must be mobilized and engaged to ensure their active involvement and buy-in;
- Must be responsive not only to international market demands but also to the much larger domestic market demands;
- Must identify and align priorities for public and private sector planning, product development, infrastructure investment, market development, marketing and promotions, as well as the institutional organization and human resources development;

Approach. The general approach to the planning process ensures aggressive stakeholder engagement that will be able to consider the various sectoral concerns of ecotourism. The approach consists of these elements:

- **Consult:** Consultative planning strategy provides an avenue for stakeholder engagement throughout the planning process. Inputs from key stakeholders such as LGUs, people's organizations (POs), and sectoral groups are considered to produce a comprehensive and inclusive development strategy.
- **Transfer:** Knowledge transfer in the planning process ensures that learned and gained techniques will be applied and employed effectively throughout implementation and adjusted to meet future challenges.
- **Harmonize:** Harmonization with current local and national strategies creates greater opportunities for collaboration among diverse stakeholders of the ecotourism value chain.

Methodology. The planning process is divided into six (6) parts. The first three (3) are the steps for the preparation of the actual plan. These steps include the: (a) review of related plans; (b) situational analysis, including stakeholders' consultation and planning workshops; and (c) plan preparation and ETWG consultation. The last three (3) parts pertain to the plan's approval and implementation. These steps include (a) approval of NESC and the Co-chair of the NEDC; (b) roll-out of NESAP and Action Planning Convergence; and (c) implementation, monitoring, and evaluation. It should be noted that similar to the NTDP, the NESAP requires a development convergence budgeting with partner agencies (see Figure 1).

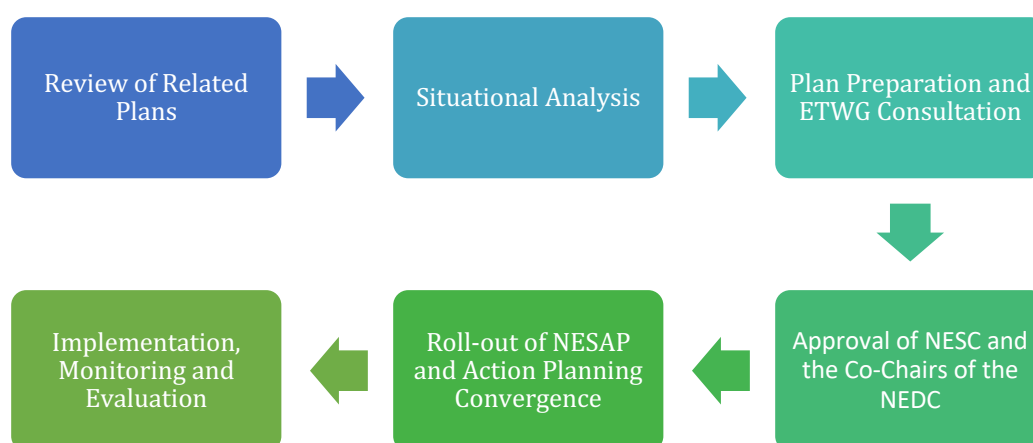


Figure 1: Step-by-step planning process for the National Ecotourism Strategic Action Plan 2024-2028.

To provide a comprehensive analysis, the following activities were undertaken for steps 1 and 2:

1) Review of Related Plans. A review of plans provided the planning team with a firm foundation for understanding the complexities of ecotourism development in the country.

- **Review and Updates from NESAP 2013-2022.** The NESAP 2013-2022 review of previous plans has been critical to the development of the NESAP 2024-2028 in the following aspects:
 - **Refined Goals and Strategies.** Setting more specific and measurable goals, and outlining targeted strategies based on the review insights.
 - **Improved Implementation.** Identifying and addressing challenges encountered in the implementation of NESAP 2013-2022 to ensure smoother execution and implementation of the new strategies.
 - **Enhanced Collaboration.** Developing a stronger and wider range of partnerships among stakeholders for more effective and inclusive ecotourism development.
 - **Prioritization.** Focusing resources on areas identified as most critical for success, based on the review's recommendations.

2) Situational Analysis. The situational analysis identified concerns and opportunities from which preliminary recommendations have been derived.

- **Stakeholder Consultation and Planning Workshop.** Consultations with

stakeholders exemplify community engagement throughout the planning process. A Technical Working Group (TWG) composed of key personnel from DOT and DENR and the industry, as well as other institutions interested in ecotourism development, was established. Consultation workshops were held throughout the initial drafting, revision, and adaptation before the publication of the plan.

These consultations provided the basis for the situational analysis that led to the formulation of the strategic programs for NESAP 2024-2028.

- **Key Informant Interviews (KIIs) and Focus Group Discussions (FGDs).** KIIs and FGDs provided updated and more precise information on ecotourism assets and potentials, especially among priority areas where critical problems and conflicts have considerable influence. Results and key findings of these interviews and discussions are provided in the Situational Analysis as part of the perspectives of the stakeholders on ecotourism development.
- **Ecotourism Site Profiling.** Prior to situational analysis, a comprehensive profiling of the country's ecotourism landscape is needed. This is to grasp the industry trends, issues, and bottlenecks, as well as existing and potential ecotourism products.
- **Using the SWOT⁴ Analysis matrix,** the collected research data (including an inventory of ecotourism resources) from various ecotourism areas will be presented. These have been rebuilt into a comprehensive study of the area to provide a general overview as well as a preliminary assessment and set of recommendations

1.3. GLOBAL ECOTOURISM MARKET AND TRENDS

The Global Ecotourism Market was worth US\$ 185.87 billion in 2021 and is anticipated to rise by 15.2% from 2022 to 2030.⁵ In the same year, the global ecotourism market was estimated at US\$172.4 billion. The same analysis forecasts a 13.9% Compound Average Growth Rate (CAGR) for 2023–2028, bringing the market to US\$ 374.2 billion.⁶

The upswing is mostly attributed to the rising appeal of solo travel, outdoor recreation, and immersive travel, as well as to the quick urbanization and accessibility of low-cost flights. According to Airport Technology, "Tourism is experiencing a spur due to low-cost carriers and their competitive prices, combined with new developments in the accommodation sector."⁷ Sustainable travelers and government authorities have been encouraged to promote ecotourism and help the ecotourism sector flourish as a result of the increased awareness of the negative effects of tourism on the environment. As more and more carbon footprints are created by visitors' activities at tourist destinations, unrestricted tourism has long been linked to environmental issues such as water pollution, soil erosion, and habitat loss.⁸

⁴ Strengths, Weaknesses, Opportunities, and Threats Analysis.

⁵ Ecotourism Global Market Report 2022.

⁶ Ecotourism Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028.

⁷ Global data Travel and Tourism, "Tourism Is Seeing a Boost Thanks to Low-Cost Travel," Airport Technology, February 3, 2022, <https://www.airport-technology.com/comment/tourism-boost-low-cost-travel/>.

⁸ Ugur Sunlu, "Environmental Impacts of Tourism Environmental Impacts of Tourism," 2003, <https://om.ciheam.org/om/pdf/a57/04001977.pdf>.

In the last ten years⁹, tourists and the younger generations have shown a growing interest in sustainable tourism. The demand for sustainable travel has grown as tourists have become more aware of the adverse impacts of over-tourism. Tour operators in various locations have realized the detrimental impacts of unmanaged mass tourism and have begun advocating regenerative tourism by modifying their trip itineraries.

Booking.com reveals from its 2019 sustainable travel report that over half (55%) of global travelers are concerned with the impacts of mass tourism on the environment, thereby making sustainable travel choices in 2019.¹⁰ Tourists and travelers are now more aware of the detrimental consequences of unsustainable tourism activities and are more inclined to choose arrangements that have minimal impacts.¹¹

The global ecotourism market research by IMARC Group analyzes the major trends in each sub-segment. The research describes the market segmentation for ecotourism, describing each category according to the activity type (land and marine ecotourism), visitor type (solo or group tourists), age group, and sales channel.¹²

Activity Type insights. Land ecotourism contributed around 70% of 2021 revenue. Safaris, animal watching, and national parks drive growth on land-based sustainable tourism. Land-based activities are low-cost and easy as compared to other activities. Thus, consumer interest in these activities has skyrocketed in recent years, showing consumer resilience. Land-based tourism increased by 16.7% from 2009 to 2018.

Coastal and marine tourism has been considered an important tourism sector preferred by domestic and foreign tourists because of its beauty, diversity, and cultural wealth. Growing tourist sentiments for adventurous activities, leisure, and vacation activities on coastal waters are major factors driving segment growth. In Europe, where most eco-tourists originate, 3.2 million people work in coastal and marine tourism, and 51% of hotel beds are coastal. Future growth is projected for the segment.

Group Insights. In 2021, group travel revenue was above 80%. Group travel, social media travel groups, and young eco-tourists fuel the expansion. In recent years, young traveler groups have demonstrated remarkable resilience in group travel. Tour companies worldwide are offering vacation packages with group activities to attract group tourists. This has increased worldwide industrial growth.

Marine activities are expected to expand by 14.6% CAGR from 2022 to 2030. The category is expanding due to changing consumer preferences, rising consumer attitudes toward daring activities, and leisure and holiday activities on coastal waterways.

Solo travel will increase by 16.9% from 2020 to 2030. During the previous decade, solo travel has increased to enjoy immersive travel and freedom. Booking.com found that 72% of American women travel alone, and they ranked first in constant solo travelers. Tour operators and holiday companies now specialize in solitary travel due to its increasing popularity.

Booking Mode Insights. In 2021, over 60% of revenue came from direct booking. A sizable elderly customer base still prefers to purchase travel, airline, and hotel

⁹ Global Data Travel and Tourism, 2022.

¹⁰ Booking global, "Booking.com Reveals Key Findings from Its 2019 Sustainable Travel Report," Booking.com (Booking global, April 17, 2019), <https://globalnews.booking.com/bookingcom-reveals-key-findings-from-its-2019-sustainable-travel-report/>.

¹¹ GVR Report cover Ecotourism Market Size, Share & Trends Analysis Report By Activity Type (Land, Marine), By Group (Solo, Group), By Booking Mode, By Age Group, By Region, And Segment Forecasts, 2022 – 2030, <https://www.grandviewresearch.com/industry-analysis/ecotourism-market-report>.

¹² "Ecotourism Market: Global Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028". IMARC Group, 2022.

accommodations directly, driving direct tour package booking growth. To get customized excursions, more eco-tourists are booking directly. Major corporations and tour operators are giving customized services and incentives when booked directly to broaden their customer reach. This has boosted market growth. Marketplace booking will grow 16.4% throughout 2022 – 2030. Most tour businesses now list their services online and on marketplaces, so buyers may compare at the one-step store before buying. Marketplace booking channels' fast travel and hotel reservations, and rich consumer experiences boost growth. Smartphones, the internet, and social media have changed how tourists book excursions and accommodations.

Age Group Insights. Young travelers are more inclined to explore new locations, use technology, and contribute to local cultures, according to the European Tourism Commission. More social media travel blogs and videos are expected to influence Generation Z (Gen Z)¹³ travelers' purchases. Almost 60.0% of 2021 revenue came from Millennials. Social media and technology have shaped millennials' travel and living ideals. Condor Ferries Ltd. reported that US Millennials spent \$200 billion on travel in 2021 and 55% wished to travel more. This finding indicates that millennials' interest in sustainable tourism has expanded, benefiting the business. Considering the industry's effect, millennial visitors are prioritizing unique experiences and sustainable tourism. This category is likely to grow profitably in the next years. Throughout the projection period, Gen Z is expected to expand by 15.0%. Technology and social media are influencing Gen Z tourists' booking habits, and real experiences are their top priority. A hyper-connected age group, Generation Z is well cognizant of the interplay of technology, health, behavior, and the environment.

Regional Market. In 2021, Europe had the highest revenue share in the ecotourism market due to environmental concerns, dissatisfaction with mass tourism, and demand for nature-based experiences. To tap into this demand, destinations around the world have begun offering eco-friendly vacation packages to attract Eco-tourists while safeguarding the environment.

Throughout the forecast period, Asia Pacific is expected to grow by 16.0%. To minimize their negative economic and social impacts on residents and the environment, more Asian visitors are rethinking their travel habits. In response to the need for sustainable tourism, airlines, hotels, and transportation services are reducing their carbon footprint in the travel ecosystem.

In a Global Sustainable Tourism Council (GSTC) study, 57.6% of respondents said their vacation must not contribute to over-tourism.¹⁴ Sustainable tourism is driven by environmental concerns and COVID-19 policies. Consequently, the regional industry is projected to see considerable demand for sustainable tourism in the next years.

Global Trends

People are typically aware of greener and more responsible travel options because of the effects of the recent pandemic and the reopening of borders to facilitate travel. Tourist behavior has changed as a result, leading to more thoughtful travel choices. According to a survey by Booking.com in 2021, 61% of travelers indicate that the pandemic has motivated them to travel more sustainably in the future, whereas 49% of travelers indicate that the pandemic has changed

¹³ Those born in the late 1990s to early 2010s, or usually earmarked at 1997 – 2012. Accessed 17 September 2024 at <https://www.ama.org/marketing-news/generational-insights-and-the-speed-of-change/>

¹⁴ Rebuilding tourism in Asia-Pacific: A more conscious traveller?" Economist Impact. Accessed at https://impact.economist.com/perspectives/sites/default/files/rebuilding_tourism_apac_economist_impact_airbnb.pdf

their outlook on making positive changes in their daily lives.¹⁵ Based on these projections, Sustainable Travel Trends 2022¹⁶ has compiled the typical sustainable tourism trends that should be anticipated during the following five years:

- **Slow and secluded travel.** *Exclusive, less-crowded places are gaining popularity. The pandemic has led to a shift towards slower, more intentional travel, with travelers seeking to spend more time in a single destination and immerse themselves in the local culture, rather than rushing from one place to another.*
- **Health & Wellness have become trendy.** *More tourist organizations are expected to provide health-related services, such as immunization programs in destinations, physical activity vacations, and mindful retreats. This also gives rise to destinations offering health and wellness experiences.*
- **Climate-conscious Travel.** *Climate change is the top issue for 87% of individuals polled, ahead of Covid-19 (85%), friends' and family's health (79%), and the expense of living (76%).¹⁷ Travelers have become increasingly aware of the impacts of their travels on the environment and are seeking ways to reduce their carbon footprint. This includes (a) choosing destinations and accommodations with sustainable practices, (b) offsetting carbon emissions, and (c) avoiding single-use plastics. Also, as travelers become more aware of the impacts of transportation on the environment, there is a growing trend towards sustainable transportation options such as electric vehicles, bicycles, and public transportation.*
- **Digital detox.** *As digital connectivity becomes more pervasive, many travelers are increasingly looking to escape technology during their vacations. Travelers are seeking out destinations and accommodations that offer opportunities to unplug and reconnect with nature and themselves.*
- **Community-based tourism.** *Travelers are showing a growing interest in authentic, local experiences that support the local community. This includes homestays, local food tours, and other experiences that allow travelers to connect with the people and culture of the destination.*
- **Circular Tourism.** *Also known as circular economy tourism, is a sustainable tourism approach that aims to reduce waste and promote the efficient use of resources. It is based on the principles of the circular economy, which seeks to eliminate waste by designing products and systems that can be reused, repaired, and recycled. Circular tourism involves rethinking the traditional linear model of tourism, where resources are extracted, consumed, and then discarded. Instead, it focuses on creating a closed-loop system where resources are reused, recycled, and regenerated.*
- **Green accommodations.** *More travelers are seeking eco-friendly accommodations, such as hotels and lodges that prioritize sustainability in their operations, from energy-efficient lighting and water conservation to recycling and composting programs.*
- **Regenerative Travel.** *Regenerative travel is a new trend that seeks to go beyond sustainability to actively contribute to the regeneration of the environment and local communities. This includes activities such as reforestation, sustainable farming, and conservation efforts.*
- **Greenwash in Tourism.** *Greenwashing is a marketing tactic used by companies to make false or exaggerated claims about the environmental benefits of their products or services.*

¹⁵ Booking.com, "Booking.com's 2021 Sustainable Travel Report Affirms Potential Watershed Moment for Industry and Consumers," Booking.com's 2021 Sustainable Travel Report Affirms Potential Watershed Moment for Industry and Consumers, June 3, 2021, <https://news.booking.com/bookingcoms-2021-sustainable-travel-report-affirms-potential-watershed-moment-for-industry-and-consumers/>.

¹⁶ "Sustainable Travel Trends 2022 - Regenerative Travel," Earth Changers, January 12, 2022, <https://www.earth-changers.com/blog/2022/1/10/sustainable-travel-trends-for-2022>.

¹⁷ The Rise of Sustainable Media, Dentsu and Microsoft Advertising, 2021.

Unfortunately, this practice is also prevalent in the tourism industry, wherein businesses may make claims about their environmental or social sustainability without actually taking meaningful actions to reduce their impact. Greenwashing in tourism often takes these forms.¹⁸

- *Misleading marketing claims. Businesses may use vague or ambiguous terms, such as "eco-friendly" or "sustainable," without providing specific details about how they are reducing their impact.*
- *Token sustainability efforts. Businesses may implement small, superficial changes, such as replacing plastic straws with paper ones, without addressing larger sustainability issues.*
- *Failure to disclose negative impacts. Tourism enterprises may promote their positive sustainability initiatives while failing to disclose other negative impacts, such as habitat destruction, pollution, or exploitation of local communities.*
- *Third-party certification misuse. Some businesses may use third-party certifications or labels without actually meeting the standards required for those certifications*

These global trends highlight ecotourism as the most suitable tourism product for green, resilient, and sustainable development. As one of the mega-diverse ecosystems of the world and with a rich cultural heritage, the Philippines will have a strategic advantage over other countries. The key therefore is to develop multidimensional ecotourism destinations featuring unique natural and cultural heritage, and values that can cater to the needs of the most discerning international and local travelers.

1.4. PHILIPPINE ECOTOURISM

The Philippines is one of the 18 mega-biodiverse countries of the world, encompassing two-thirds of the earth's biodiversity and around 70% and 80% of the world's plant and animal species.¹⁹ It has great potential for ecotourism due to its abundant natural resources, diverse wildlife, and unique ecosystems, and the ecotourism sector is continuously developing. To improve visitor accessibility, some locations will have to develop infrastructure. Transportation, lodging, and tourist facilities need further investment. Sustainable tourism development will have to be part of the capacity and skills development to ensure that ecotourism follows its essential tenets of environmental conservation and cultural heritage protection.

An interview²⁰ with Dr. Fernando Y. Roxas back in 2014 still resonates with the ecotourism sector today. When asked about the prospects of ecotourism for the country, Dr. Roxas, a prominent consultant on sustainable tourism and energy systems, offers a glimpse into the viability of ecotourism being a sector that needs the least infrastructure investment but possesses immense potential in terms of the services and tourism value chain. Owing to its rich biodiversity and unique cultural sites, the country has a lot of areas that are well-positioned for ecotourism. On top of that, Roxas noted that the Philippines has a service culture, on account of the innate hospitality among Filipinos. These potentials however are offset by the poor performance of the country's entire tourism industry as compared to our ASEAN neighbors. In terms of ecotourism, the DOT has still to come up with a good marketing campaign that could level our ecotourism portfolio with that of Malaysia or the Mekong

¹⁸ Alan Young, "Greenwashing, Ecotourism and Sustainability Are Now a Major Concern for Travelers | by Alan Young," Hospitality Net, September 6, 2022, <https://www.hospitalitynet.org/opinion/4112282.html>.

¹⁹ Convention on Biological Diversity, "Status and trends of biodiversity, including benefits from biodiversity and ecosystem services," <https://www.cbd.int/countries/profile>.

²⁰ Fernando Roxas, Can Ecotourism Boost the Economy in the Philippines? Yale Insights, October 10, 2014, <https://insights.som.yale.edu/insights/can-ecotourism-boost-the-economy-in-the-philippines>.

Region.

In terms of benefits to the economy, ecotourism highlights potential investments in areas of the country that have otherwise been left unattended and untouched, thereby providing economic opportunities to local communities alongside conservation efforts. Based on PSA's partial estimate in 2022, tourism accounts for 6.2% of the GDP, while 2019 recorded its banner year at 12.7%.²¹ Of these figures, ecotourism is still an indeterminate statistic, albeit a growing segment within the industry. Consequently, there are no specific figures available on the exact contribution of ecotourism to the economy. This seeming lack of data is partly due to the unavailability of a statistical tools to collate and process ecotourism data. Fortunately, the ecotourism statistical framework has been approved by the National Ecotourism Steering Committee (NESC) in 2023 and will be implemented by all ecotourism sites. With conceptualization started in 2019, the ecotourism statistical framework aims to track, and monitor ecotourism development in the country, and determine the sector's contribution to the tourism industry.²²

Nonetheless, the economic value of ecotourism represents just a fraction of its entire value. Ecotourism plays a crucial role in rural and isolated areas, not only in producing economic but also social benefits and fostering resiliency through sustainable development alternatives and local pride. These value criteria may be categorized into two groups: social and ecological.

- Enhancing environmental awareness. Individuals who participate in ecotourism become more conscious and sensitive to a variety of environmental challenges, such as global warming, deforestation, and depletion of natural resources, and this transformation will have good long-term consequences for both the people involved and the environment.
- Raising the degree of cross-cultural understanding. This fact is a significant contributor to the value of ecotourism as it will boost visitors' awareness of many elements of local culture.
- Preservation of unique tourist locations for future generations. Ecotourism seeks to reduce the harmful effects of tourism and, on the other hand, to produce good effects for a location as a consequence of tourism activities. This feature of ecotourism provides a considerable value proposition in terms of the preservation of distinctive characteristics of tourist locations for the benefit of current and future customers.
- Sustainable income generation for tourism destinations. Ecotourism can effectively contribute to the alleviation of poverty in local communities by increasing the level of local workforce participation in the provision of ecotourism services and by allocating all or a portion of the revenues generated by ecotourism to various charitable causes aiming to improve the living conditions of local people. DENR, through Administrative Order No. 2013-19 issued on July 1, 2013, recognizes the contribution of ecotourism in promoting conservation and sustainable use of natural resources in protected areas to capitalize on the potential of ecotourism in promoting conservation in protected area management. This calls for the implementation of an ecotourism management strategy in protected areas.

²¹"Share of Tourism to GDP Is 12.7 Percent in 2019 | Philippine Statistics Authority," psa.gov.ph, June 19, 2020, <https://psa.gov.ph/content/share-tourism-gdp-127-percent-2019>

²² The ongoing development of the ecotourism statistical framework is an initiative of the NES convergence program with the DOT

1.5. THE PHILIPPINE ECOTOURISM POLICY FRAMEWORK

Philippine ecotourism is primarily governed by Executive Order (EO) 111. The Order creates a framework for regulated ecotourism by promoting sustainable ecotourism in the Philippines through explicit organizational policy standards. The Order articulates that the State shall develop and promote sustainable tourism while encouraging Filipinos to participate in boosting the Philippine economy's growth and competitiveness and that the State shall sustainably use, develop, manage, protect, and conserve the country's environment, natural resources, and cultural heritage for future generations. Philippine ecotourism governance began with these two policies.²³

EO 111 created the National Ecotourism Development Council (NEDC), consisting of the Secretaries of Tourism, Environment and Natural Resources, Interior and Local Government, Trade and Industry, Finance, Education, the Secretary-General of NEDA, private sector, and NGO representatives. NEDC-endorsed programs and activities were implemented by the National Ecotourism Steering Committee (NESC) and Regional Ecotourism Committees (RECs). EO111 further required the formation of an Ecotourism Technical Working Group (ETWG) to assist the NEDC and NESC with technical and administrative matters.²⁴

The same policy tasked the EO 111 Bodies to formulate a national strategy for ecotourism development and promotion — the National Ecotourism Strategy (NES), which is founded on the vision to advocate, foster, coordinate, monitor, and mobilize support for ecotourism. Its goals are (a) to promote and mobilize support for ecotourism from all sectors—government, businesses, and the general public—to develop a tourism culture among local people; (b) institutionalize community participation in planning, development, implementation, and monitoring of ecotourism projects; (c) promote environmental education and ethics; and (d) develop LGUs and local entrepreneurs' capabilities.

The first NES was approved in 2001 and was implemented from 2002 to 2012 through the development of a National Ecotourism Program (NEP). The NES subsequently strengthened the partnership between the Departments of Tourism (DOT) and the Environment and Natural Resources (DENR) to protect and preserve the country's natural and cultural resources while providing livelihood for local people. The NES was complemented by the National Ecotourism Program, which was supported by an Action Plan in the short-term (2002-2004), medium-term (2002-2007), and long-term (2002-2012), essentially outlining the National Ecotourism Program and Action Plan (NEPAP). Soon after, the NEPAP was modified into a National Ecotourism Strategy and Action Plan (NESAP) 2013-2022 with updated ecotourism programs and action plan comprising three implementation periods: short-term (2013-2016), medium-term (2013-2018), and long-term (2013-2022). With the conclusion of NESAP 2013-2022, the ecotourism development framework is currently articulated in the NESAP 2024-2028.

Apart from EO 111, the following laws and directives provide the basis for the institutional framework, strategies, and action plans for ecotourism development in the country:

- **Tourism Act of 2009 (Republic Act No. 9593).** The basis of national tourism policy, restructuring the tourism-related agencies to provide a holistic national approach for sustainable tourism development. Notably, sustainable and responsible tourism, and ecotourism were key objectives of the law. It also classifies ecotourism facilities as a primary tourism enterprise, requiring DOT accreditation. Under the restructured Tourism Infrastructure and Enterprise Zone Authority (TIEZA), a percentage of the

²³ "Executive Order No. 111, 'Establishing the Guidelines for Ecotourism Development in the Philippines'" (1999).

²⁴ The institutional framework is collectively known as the EO111 Bodies, or ecotourism bodies.

proceeds of the travel tax collection should be allocated for ecotourism development in depressed areas with strong tourism potential. The same law emphasized the convergence of the DOT and DENR in terms of the formulation of the National Ecotourism policy.²⁵

- **Philippine Development Plan 2023–2028.** Under the plan's key transformation strategies for the economic and production sector, tourism is identified as a priority sector to reinvigorate services through market expansion by promoting sustainable, inclusive, and resilient multidimensional tourism. Moreover, the development of biodiversity-friendly enterprises and ecotourism sites within and outside protected areas is identified as one of the priority thrusts in promoting and expanding natural resource-based industries and enterprises. Also, the conduct of carrying capacity assessment in protected areas and ecotourism sites will further intensify ecosystem protection, rehabilitation, and management.
- **National Tourism Development Plan 2023–2028.** With its vision of transforming the country as a tourism powerhouse in Asia, the NTDP outlines its strategic goals: (a) improvement of tourism infrastructure and accessibility; (b) cohesive and comprehensive digitalization and connectivity; (c) enhancement of the overall tourist experience; (d) equalization of tourism product development and promotion; (e) diversification of the tourism portfolio through multidimensional tourism; (f) maximization of domestic and international tourism; and (g) strengthening tourism governance through close collaborations with national and local stakeholders.

Recognizing ecotourism within its nature-based tourism products, the NTDP pushes for a more collaborative undertaking with the DENR in managing environmental issues and concerns, particularly the protection and conservation of biodiversity in the identified ecotourism areas. In the Philippines, ecotourism is intertwined with cultural heritages and visitor's education. The same principle is adhered to by the current NTDP, by encouraging the aggrupation of cultural heritage in all tourism products towards a better tourism experience. Guided by the strategic value of instilling what is truly Filipino, the NTDP has become a stronger guiding policy for ecotourism development.

- **DENR Administrative Order 2013-19:** Guidelines on Ecotourism Planning and Management in Protected Areas. Specific to protected areas under the National Integrated Protected Areas System (NIPAS), the guidelines set out the systematic process for ecotourism planning and management in these areas within the purview of DENR.
- **Philippine Biodiversity Strategy and Action Plan (PBSAP) 2015-2028.** The PBSAP serves as the country's roadmap to conserve and sustainably manage biological resources, and the pursuit of inclusive economic growth. It is currently being updated to align with the Kunming-Montreal Global Biodiversity Framework.
- Since ecotourism has biodiversity conservation as its primary pillar, its development is also framed on several **international conventions and multilateral environmental agreements (MEA)** of which the Philippines is a signatory, such as the Convention on Biological Diversity (CBD), Framework Convention on Climate

²⁵ DOT (2009) Implementing Rules and Regulations of the Republic Act No. 9593 or the Tourism Act of 2009.

Change (FCCC) and the Convention on Wetlands, known as the Ramsar Convention, among others. In addition, the Philippines adopts the ASEAN Ecotourism Standards, which provide criteria for the effective conservation of ecotourism sites. The Philippines must adopt its national strategies and programs to align with these international commitments.

Highlights of National Ecotourism Strategy and Action Plan (NESAP) 2013-2022 Assessment

Before the updating of NESAP 2013 – 2022, review and assessment were conducted taking into consideration the milestones of the plan vis-a-vis the challenges and innovations needed in the ecotourism sector. The review of the NESAP 2013–2022 (1) assessed plans, targets and strategies with regard to the achievement of its goals; and (2) recommended programs and strategies for ecotourism development and enhancement.

As a backgrounder, the NESAP 2013-2022 aimed to create an environmentally and socially responsible ecotourism development that protects the integrity and diversity of the country's natural resources, educates and entertains visitors, and provides larger and more widespread income and employment opportunities to local communities and their constituents, especially women, youth, indigenous peoples, and other vulnerable groups.

This has been reflected in its logical framework where eight (8) strategies have been laid out. The eight strategies defined their action programs with corresponding target outputs spread into these programs:

- Strategy 1. Developing and marketing diversified and competitive ecotourism products
- Strategy 2. Creating a conducive environment for ecotourism investments
- Strategy 3. Maximizing economic benefits to the host communities
- Strategy 4. Promoting and developing a culture of ecotourism
- Strategy 5. Strengthening institutional capacity
- Strategy 6. Developing and strengthening partnership
- Strategy 7. Establishing mechanisms for sustainable financing
- Strategy 8. Monitoring outcomes and impacts

According to the report, the implementation of the NESAP 2013–2022 has been relatively successful in achieving its objectives for each of its strategies (see Figure 2).



Figure 2: Accomplishment of NESAP 2013–2022.

The review found that Strategies 2, 5, 6, and 8 have achieved 100% of their goals.²⁶ The DOT and the DENR have developed ecotourism sites within protected areas and under the LGUs' site plans and carrying capacity for stakeholders. The DENR has also regularly funded protected areas (see Figure 3). In addition, the DOT's handling of the capacity building and the formulation of monitoring and evaluation framework for the sites has contributed to the attainment of the goals.

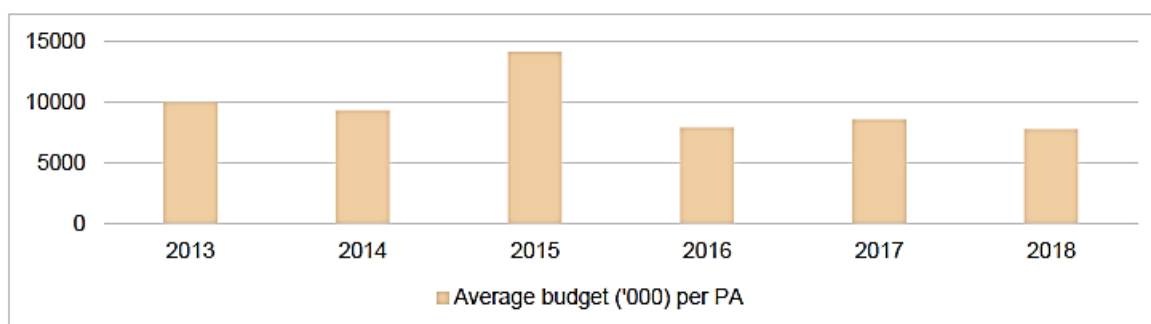


Figure 3: DENR Average Budget in every Protected Area

According to the review, ecotourism development is more immediate when it is inside the protected areas and those that are under the management of LGUs. The site development was also supported by public infrastructure development like roads or bridges. Since it is part of the protected areas, naturally, the sites are more diverse ecologically. However, activities are limited and carefully designed in consideration of the conservation and protection of the biodiversity in the area. It was also observed that most infrastructure development is connected to PAs and LGU-managed.

For privately managed ecotourism sites, innovations in activities are more pronounced since there are no restrictions. However, these sites usually have limited natural features or less native biodiversity. These findings were also in consonance with the results of the site

²⁶ The review matrix focuses only on the results as defined by each strategy's success indicator. NESAP 2013 – 2022 Review Report (DOT).

validations and the focus group discussions.

The results leave more room to develop programs to maximize economic advantage to host communities and entice more private sectors to invest in ecotourism.

The Review offered several suggestions after taking into account the previous NESAP's achieved milestones and identified areas for development. These recommendations are also being taken into consideration for the most recent update for this plan. These recommendations focus on key areas as follows:

1. Rationalize and integrate the ecotourism programs with DOT domestic and international tourism and product development thrust, as well as, with the DENR programs;
2. Recalibrate and enhance programs to address the impacts of the COVID-19 pandemic; and
3. Revisit the current eight (8) strategies of NESAP to include action programs on ecotourism site and visitor management, disaster risk reduction, safety protocols, and climate-proofing strategies

1.6. PROFILING ECOTOURISM SITES AND PROJECTS

The country's ecotourism is a continuously evolving subsector, both as a discourse and as a practice. Common among these definitions are five distinguishing features to characterize ecotourism:

- Conservation of nature and culture
- Reinvestment of income to maintain the quality of resources and conservation
- Ecologically, economically, and socio-culturally sustainable
- Ethical, showing corporate social responsibility
- Education about biodiversity, habitats, and cultures

Ecotourism, according to the definition of The International Ecotourism Society means "responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education."²⁷ On the other hand, the Bohol Ecotourism Congress of 1999 defines ecotourism as "a form of sustainable tourism within a natural and cultural heritage area where community participation, protection and management of natural resources, culture, and Indigenous knowledge and practices, environmental education and ethics, as well as economic benefits are fostered and pursued for the enrichment of host communities and the satisfaction of visitors." This has been the official definition adopted in the NES.²⁸

Building on this characterization, the NESAP 2024-2028 embarks on profiling and assessing existing and potential ecotourism programs in select areas of the country to draw out the country's current ecotourism profile.

The same ecotourism profile would lead to an updated strategic direction and action plans that would help propel Philippine ecotourism to new heights, one that is more beneficial to all – the host communities, the environment, the investors, and, of course, visitors.

²⁷ "TIES Overview," The International Ecotourism Society, accessed March 2, 2023, <https://ecotourism.org/ties-overview/>.

²⁸ National Ecotourism Steering Committee and Ecotourism Technical Working Group, "National Ecotourism Strategy" (Quezon City: National Ecotourism Development Council, July 2002).



Situational Analysis

2. SITUATIONAL ANALYSIS

2.1. PHILIPPINE ECOTOURISM RESOURCES

During the cluster consultations, the Regional Ecotourism Committee (REC) members and protected area (PA) managers identified a total of 455 ecotourism sites/projects all over the country. These include natural areas/resources, cultural and heritage resources, nature-based activities or products from protected areas (both NIPAS and non-NIPAS sites), ecotourism projects managed by LGUs, and privately managed ecotourism sites (see Table 1).

Table 1: Number of Ecotourism Sites

NUMBER OF ECOTOURISM SITES IN THE COUNTRY				
TYPE	LUZON	VISAYAS	MINDANAO	TOTAL
Protected Areas ^a	139	45	64	248
LGU-managed ^{b,c}	110	25	19	154
Privately managed ^{b,c}	17	4	32	53
Grand Total	266	74	115	455

Sources: ^a DENR-BMB, 2022; ^{b,c} DOT-ROs and Stakeholders Consultation

It is noticeable that most ecotourism sites are within the protected areas (PAs) at 54.5%. Most of the PAs are found in Luzon (52.3%). The LGUs also manage 33.8% of ecotourism sites, most of which are also in Luzon (58.5%). The private sector has also invested in ecotourism sites (11.6%). Surprisingly, 60.4% of these privately managed ecotourism sites are in Mindanao. It should be noted that this listing includes all ecotourism sites and projects within a single ecotourism area. For instance, Bataan Natural Park may have a mountain, falls, and a river where different ecotourism projects may exist.

The map on the Philippine Protected Areas network shows the distribution of protected areas and potential ecotourism sites all over the country (see Figure 4). Protected areas have been established in all regions, with some local government units declaring their localized protected areas. However, not all of the protected areas have established economic or ecotourism activities. Hence, there is a great opportunity to develop more ecotourism sites in the future.

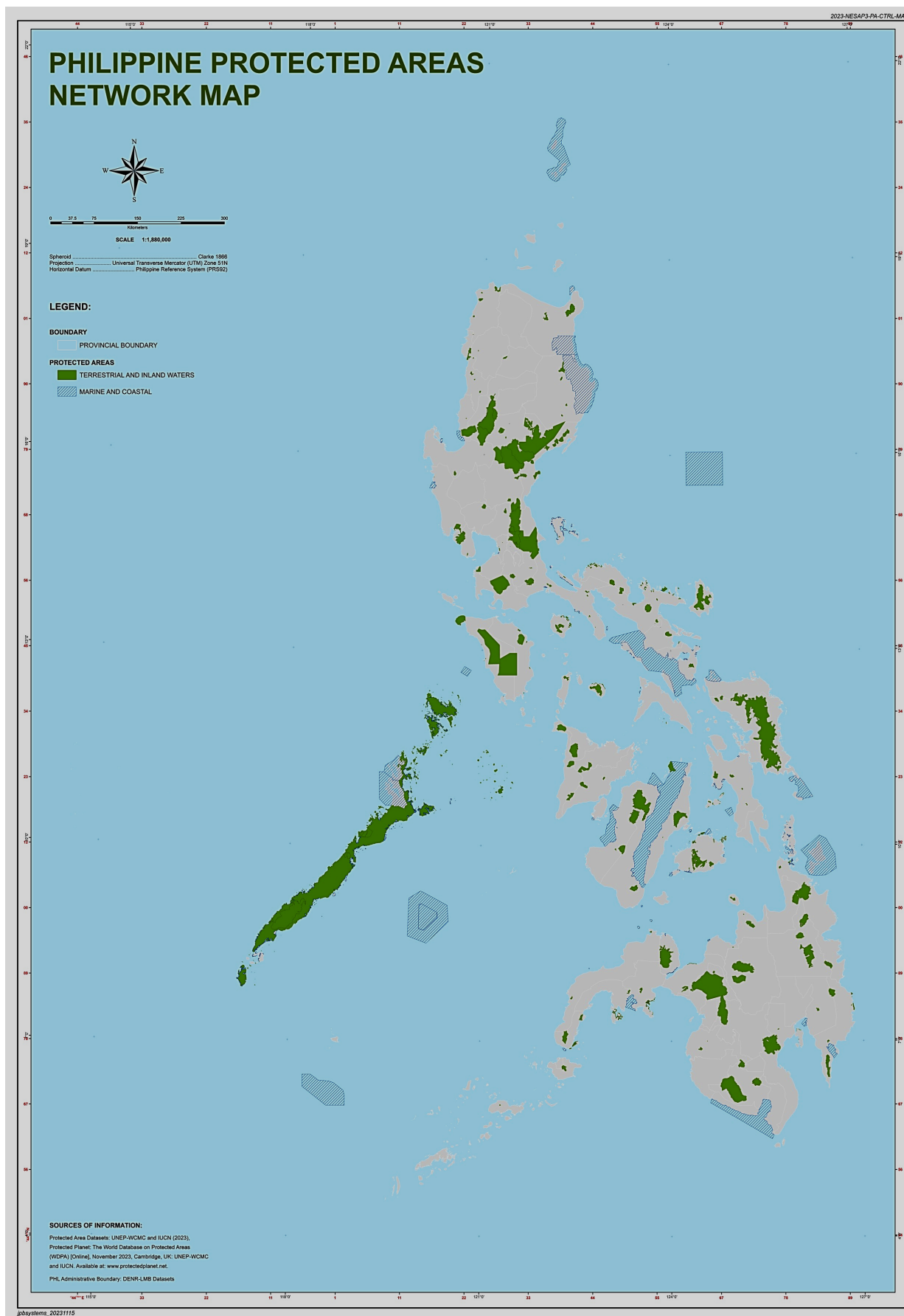


Figure 4: Philippine Protected Areas Network Map.

A study of selected ecotourism sites during the REC cluster consultations revealed similar issues and concerns but at varied levels. Ecotourism sites co-managed by the DENR, the LGU, and the host communities are located inside protected areas and have rich biodiversity and natural features. However, their facilities require more improvement and have limited ecotourism activities.

On the other hand, ecotourism sites privately managed have diminished natural features and characteristically lean more toward farm tourism but have varying activities. Since privately managed ecotourism sites are not part of the protected areas, road infrastructure is lacking.

Moreover, the assessment showed how important the level of stakeholder engagement is in ecotourism projects. Sites that involve local communities in activities both in destination preparedness and in management are usually the ones that are resilient and sustainable.

Figure 5 shows a summary of the Assessment of Selected Ecotourism Sites. Using a point system, the selected sites can be compared concerning certain attributes important in ecotourism development.

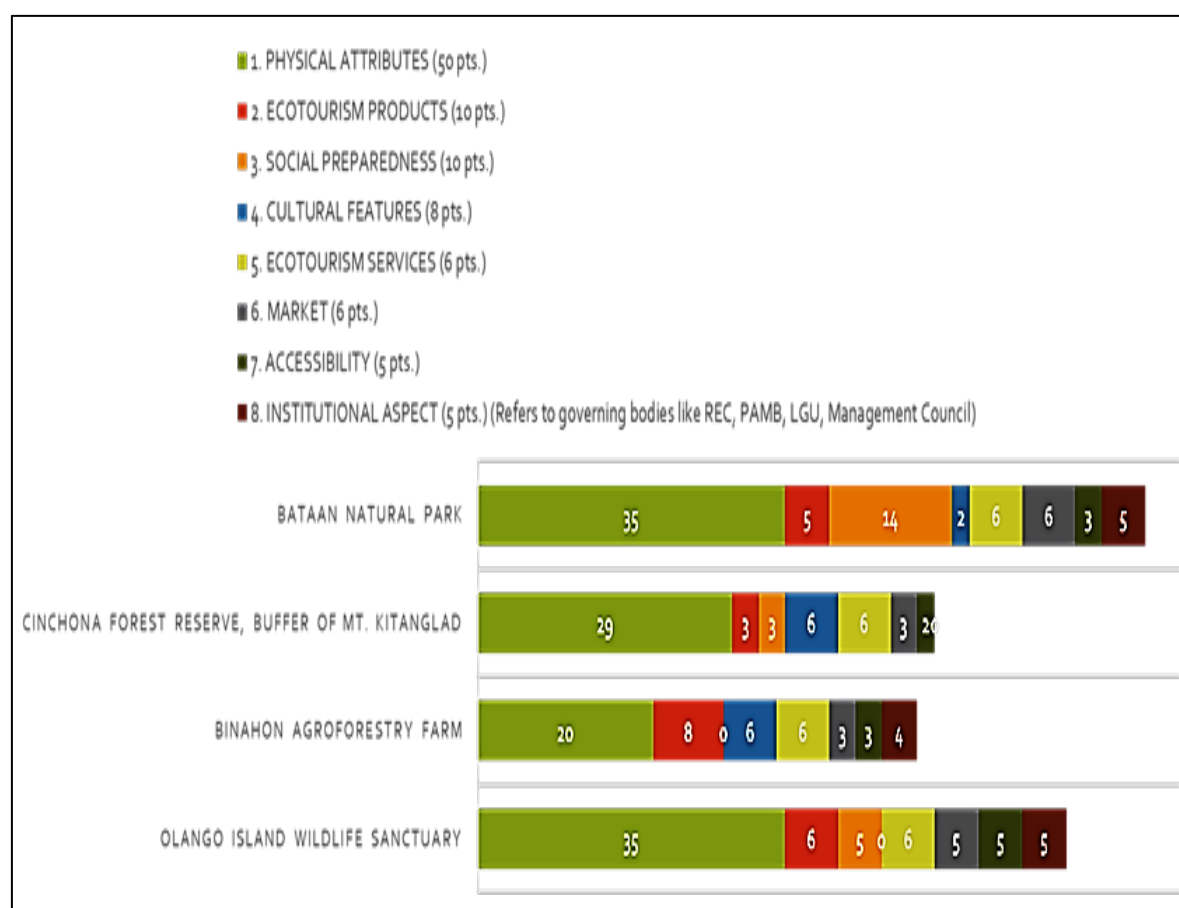


Figure 5: Summary of Assessment on Select Ecotourism Sites in the country.

2.2. VISITOR ARRIVALS

Determining the total number of visitors to ecotourism sites and projects is quite challenging

since it was only recently that the NEDC approved the Ecotourism Statistical Framework²⁹ that will standardize the compilation systems. At best, the submissions of ecotourism data from some regions can be used as indicative figures for the growth of ecotourism.

Visitor arrivals to the Philippines in 2023 have started to recover. In 2023, the Philippines received a total of 5,450,557 visitors, presenting a 66% recovery from the pre-COVID-19 2019 visitor arrivals. The growth of the arrivals was as steep as expected as the underlying trend after 2021 was revenge travel to places that provide authentic experiences. The 5.45 million visitors added an estimated US\$ 8.7 billion tourism receipts to the Philippines.³⁰

Regional distribution of overnight visitors from accommodation establishments data from 2023 summed up to 55,329,274. The figure is at 103.7% recovery from the pre-COVID-19 (2019) and 38.5% more than the regional visitors in 2022. Based on the same report, 87.7% of the reported overnight visitors are Philippine residents or domestic visitors. This implies that several top destinations outside Metro Manila are associated with nature-based and cultural tourism (see Table 2).³¹ The regional travelers visited ecotourism sites. In the 2022 report of tourist attraction visitors,³² 21 of the top 100 tourist attractions are under the nature type, and 30 were under the cultural and historical heritage type. Of the same report, 40 attractions are of sports and recreation type which includes parks, trails, beaches, and other nature-based activities that may be considered as connected to ecotourism.

²⁹ NEDC Resolution 2023-01 Adoption of the Ecotourism Statistical Framework

³⁰ DOT International Visitor Arrivals Report 2023.

³¹ DOT Regional Distribution of Overnight Travelers Report 2023, as of 10 May 2024.

³² DOT Regional Distribution of Tourist Attraction Visitors 2022, as of 2023.

Table 2: 2023 Top Overnight Destinations from the Regional Distribution of Travelers

Top 20	Foreign Travelers	Overseas Filipinos	Domestic Travelers	Total
1 NCR (National Capital Region)	2,355,069	5,827	4,666,549	7,027,445
2 Cebu (inc. Cebu City, Lapu-lapu City, and Mandaue City)	1,447,027	3,328	2,584,283	4,034,638
3 Batangas	39,644	-	3,296,088	3,335,732
4 Rizal	213	-	3,042,614	3,042,827
5 Aklan (inc. Boracay Island)	428,704	39,236	1,732,198	2,200,138
6 Zambales (inc. Subic Bay Freeport Zone and Olongapo City)	21,637	420	1,943,762	1,965,819
7 Pampanga (inc. Clark Freeport Zone, City of San Fernando, and Angeles City)	591,516	110	1,221,927	1,813,553
8 Palawan (inc. Puerto Princesa City)	707,537	11,025	934,773	1,653,335
9 Davao del Sur (inc. Davao City)	86,118	10,459	1,417,027	1,513,604
10 Camarines Sur	62,528	131	1,423,803	1,486,462
11 Negros Occidental (inc. Bacolod City)	67,003	624	1,407,304	1,474,931
12 Benguet (inc. Baguio City)	8,973	56	1,367,734	1,376,763
13 Cavite	18,972	-	1,322,323	1,341,295
14 Camarines Norte	889	1,183	1,276,561	1,278,633
15 Quezon	520	6	1,263,655	1,264,181
16 Iloilo Province (inc. Iloilo City)	47,941	8,594	1,148,283	1,204,818
17 Misamis Oriental (inc. Cagayan de Oro City)	21,961	8	1,124,105	1,146,074
18 Albay	10,825	-	1,064,416	1,075,241
19 Bohol	325,499	480	686,875	1,012,854
20 South Cotabato (inc. General Santos City)	5,675	-	989,576	995,251
Sub-Total (Top 20)	6,248,251	81,487	33,913,856	40,243,594
Other Provinces	466,042	11,599	14,608,739	15,086,380
GRAND TOTAL	6,714,293	93,086	48,522,595	55,329,974

To provide context on the ecotourism visitors, the RECs through the DOT provided their visitor arrival data from ecotourism sites. Table 3 below sums up the visitor arrivals on nature-based and ecotourism sites from 2017 – 2021 as submitted by RECS from some regions. Unfortunately, only five RECs (Regions 6, 7, 9, 10, and 13) submitted data regarding their visitor arrivals. For regions that have both data on domestic and international (Regions 7, 10, and 13)³³, the figures followed the pattern presented by the Regional Distribution of Overnight Visitors³⁴. Most of the visitors in the identified ecotourism sites for these regions are domestic or Philippine residents (an annual average of 92.6%).

³³ Since it is highly improbable that tourist attractions will not have domestic visitors, it is safer to compare submissions of regions with the same data disaggregation to make comparison more reliable.

³⁴ Data from tourist sites like ecotourism is a separate compilation, and is never summed up together with those from AE, following the DOT SLTSS.

Table 3: Visitor Arrival Profiles in Ecotourism Sites from Some Regions

Region	Market	2017	2018	2019	2020	2021
Region 6	Domestic	-	-	-	-	396,547
	International	835,788	560,100	1,011,675	124,403	11,877
	Total	835,788	560,100	1,011,675	124,403	408,424
Region 7	Domestic	82,738	89,088	72,296	16,034	16,954
	International	18,028	17,684	16,826	5,093	2,922
	Total	100,766	106,772	89,122	21,127	19,876
Region 9	International	7,473	9,475	6,069	604	2,391
Region 10 (Mt. Kitanglad Range Natural Park)	Domestic	7473	9475	6069	604	2391
	International	90	82	53	0	0
	Total	7563	9557	6122	604	2391
Region 13	Domestic	407,652	405,607	477,183	80,473	28,644
	International	10,568	12,396	27,598	8,533	227
	Total	418,220	418,003	504,781	89,006	28,871
Total	Domestic	497,863	504,170	555,548	97,111	444,536
	International	871,947	599,737	1,062,221	138,633	17,417
	Grand Total	1,369,810	1,103,907	1,617,769	235,744	461,953
<i>For Regions with Input for both markets on the same periods (7, 10, 13)</i>						
Filtered Total	Domestic	497,863	504,170	555,548	97,111	47,989
	International	28,686	30,162	44,477	13,626	3,149
	Grand Total	526,549	534,332	600,025	110,737	51,138

To give another perspective, the data from protected areas presented a clearer picture of how valuable ecotourism is when it comes to providing economic benefits – enough to sustain the maintenance of the same sites and the continuation of the conservation of the whole protected area and not only of the area where tourism activities were allowed (see Table 4).

From 2014-2019, visitor arrivals in ecotourism sites within the protected areas have recorded an annual average of 2.5 million and an average income of PHP 51.6 million from entrance and facilities fees. The compounded growth for the same period is 6.7% and 43.6 % for visitor arrivals and income, respectively. The year 2022 marked a 91.2% recovery from the 2019 figure, with 2.2 million visitors while income has recovered around 67% of the 2019 figure. While it is a bit early to tell how high the growth trend post-pandemic, it is safe to say that it is growing and recovering fast.

Table 4: Visitor and Income Statistics in Protected Areas

Year	Visitors	Income From Ecotourism		Total
		Entrance Fee	Facilities User Fee	
2014	1,723,609	₱14,398,235.80	₱1,524,949.45	₱15,923,185.25
2015	2,081,923	₱21,614,356.23	₱3,075,337.67	₱24,689,693.90
2016	1,839,691	₱44,361,109.50	₱2,829,678.14	₱47,190,787.64
2017	3,110,748	₱44,983,618.79	₱5,718,335.00	₱50,701,953.79
2018	3,969,900	₱66,047,347.58	₱7,808,656.00	₱73,856,003.58
2019	2,387,500	₱94,803,990.25	₱2,505,879.23	₱97,309,869.48
2020	731,518	₱11,221,502.69	₱3,717,723.29	₱14,939,225.98
2021	1,158,664	₱12,298,858.84	₱5,776,745.00	₱18,075,603.84
2022	2,176,659	₱53,158,663.30	₱12,267,158.36	₱65,425,821.66
Average ('14-'19)	2,518,895	₱47,701,443.03	₱3,910,472.58	₱51,611,915.61
CAGR ('14-'19)	6.7%	45.8%	10.4%	43.6%
% Difference ('21-'22)	87.9%	332.2%	112.4%	262.0%
Post-Pandemic Recovery (2022)	91.2%	56.1%	489.5%	67.2%

The figures are based on the statistical reports submitted to BMB through the BPKMD.

2.3. EMPLOYMENT AND JOB OPPORTUNITIES IN ECOTOURISM

Assessing the contribution of ecotourism in terms of employment and job opportunities is far more challenging than arrivals and income from established protected areas. In protected areas, what is accounted for is the number of directly employed by the site. It must also be considered that many of the communities that live in ecotourism sites in protected areas participate in ecotourism activities, and hence, opportunity assessment might be at the household level or with the informal economic sector players.

For now, the assessment is limited to the priority people's organization being monitored by the DENR-BMB. Out of the 205 POs (see Figure 6) identified as biodiversity-friendly enterprises (BDFEs) monitored, only 51 are directly involved in ecotourism projects. The rest of the BDFEs are businesses that utilize resources in a way that promotes sustainability and enhances biodiversity, to increase community appreciation for biodiversity and its associated ecosystem services. According to DENR-BMB, the BDFE-POs tend to diversify their activities every year. Hence, potentially, all can develop ecotourism projects. It indicates a vast potential for expansion by supporting the creation of BDFE-POs in all regions and encouraging them to engage in ecotourism projects. Using the data on members of POs, the BDFE-POs have an average of 62.7 members. Using that, it can be estimated that 3,198 individuals are involved in ecotourism projects of the BDFE-POs, and a possible 12,854 individuals that can be all be involved in ecotourism should all BDFE-POs diversify with ecotourism projects in the future. It can be surmised that BDFE-POs contribute positively to providing employment and job opportunities at the local level.

However, to assess it fully in the future, it would be necessary to gather broader data and consider the wider economic and environmental context. The initial data only highlights the potential of this sector for sustainable job creation and economic development.

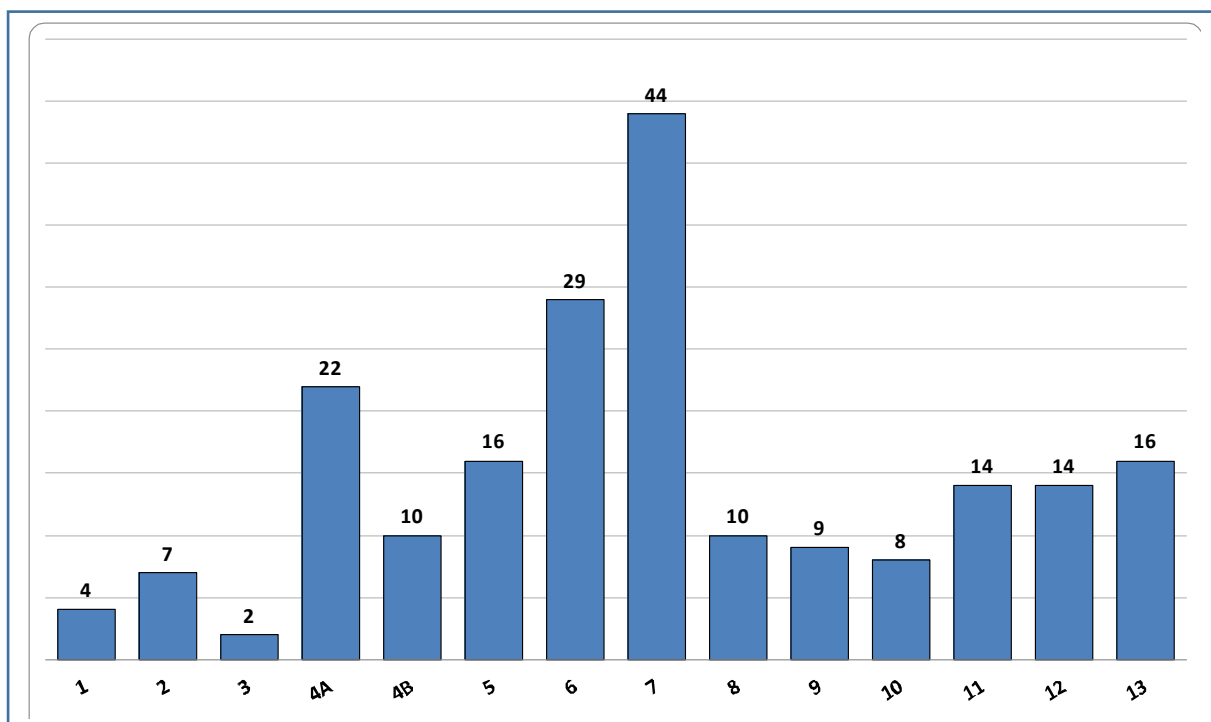


Figure 6: Number of BDFE POs per Region as of 2023.
The figures are based on the statistical reports submitted to BMB through the BPKMD.

In general, the profiling of ecotourism sites and their visitors based on administrative data highlighted the lack of uniform and updated data. The situation warrants that the NEDC ensure in the future that the DOT Standard Local Tourism Statistics System (SLTSS) and the Ecotourism Statistics Framework (ESF) will be implemented nationwide to come up with a better data collection system.

2.4. PROFILE OF ECOTOURISM MARKET IN THE PHILIPPINES

Based on the collected data from the RECs and protected area managers, the stakeholders have identified their key markets and their proposed strategies to expand these markets (see Table 5).

Table 5: Ecotourism Market and Strategies Identified by Regional Stakeholders

Market	Strategy
Nature, adventure, and culture enthusiast among millennials and young professionals	Add visitor information and assistance centers and continuous promotion through AVP and brochures.
Outdoor enthusiasts	Strengthen promotion through photography and blog contest
Students and researchers	Undertake aggressive information dissemination and promotion through social media
Foreign Ecotourists	Ease travel restrictions, support and prioritize tourism infrastructure projects
Local tourist groups such as family	Balik-Probinsya, Strengthen partnerships with tourism stakeholders, institutionalized LGU tourism office.

Ecotourism could target a wide sector of the market that is now characterized as travelers who seek destinations that are outside their usual environment offer authentic experiences, and activities that follow responsible travel practices. The following includes some of the target markets for ecotourism.

1. **Nature lovers:** Ecotourism is all about appreciating the natural world, so targeting people who love nature and outdoor activities is a good start. This could include hikers, bird watchers, scuba divers, and wildlife enthusiasts.
2. **Sustainable travelers:** Ecotourism also emphasizes sustainability and responsible travel practices. Marketing efforts could target environmentally conscious travelers who prioritize reducing their impact on the environment and supporting local communities.
3. **Adventure seekers:** Ecotourism activities can include adventurous experiences like zip-lining, caving, and kayaking. Targeting thrill-seekers who are also interested in nature could be a good approach.
4. **Cultural enthusiasts:** The Philippines is known for its rich cultural heritage, and ecotourism can provide opportunities for visitors to learn about traditional practices and ways of life. Targeting travelers who are interested in cultural experiences could be a good fit.
5. **Wellness travelers:** Ecotourism can also appeal to those looking for wellness experiences. For example, yoga retreats, spa treatments, and meditation sessions in a natural setting could be marketed to those seeking relaxation and rejuvenation.
6. **Educational groups:** Schools, universities, and other educational institutions could be targeted as potential customers for ecotourism experiences. Offering educational tours and experiences that focus on environmental conservation, sustainability, and local culture could appeal to educators and students.
7. **Family travelers:** Families could be a good target market for ecotourism experiences. Activities that cater to both children and adults, such as nature walks and wildlife safaris, could be marketed to families looking for educational and fun experiences.

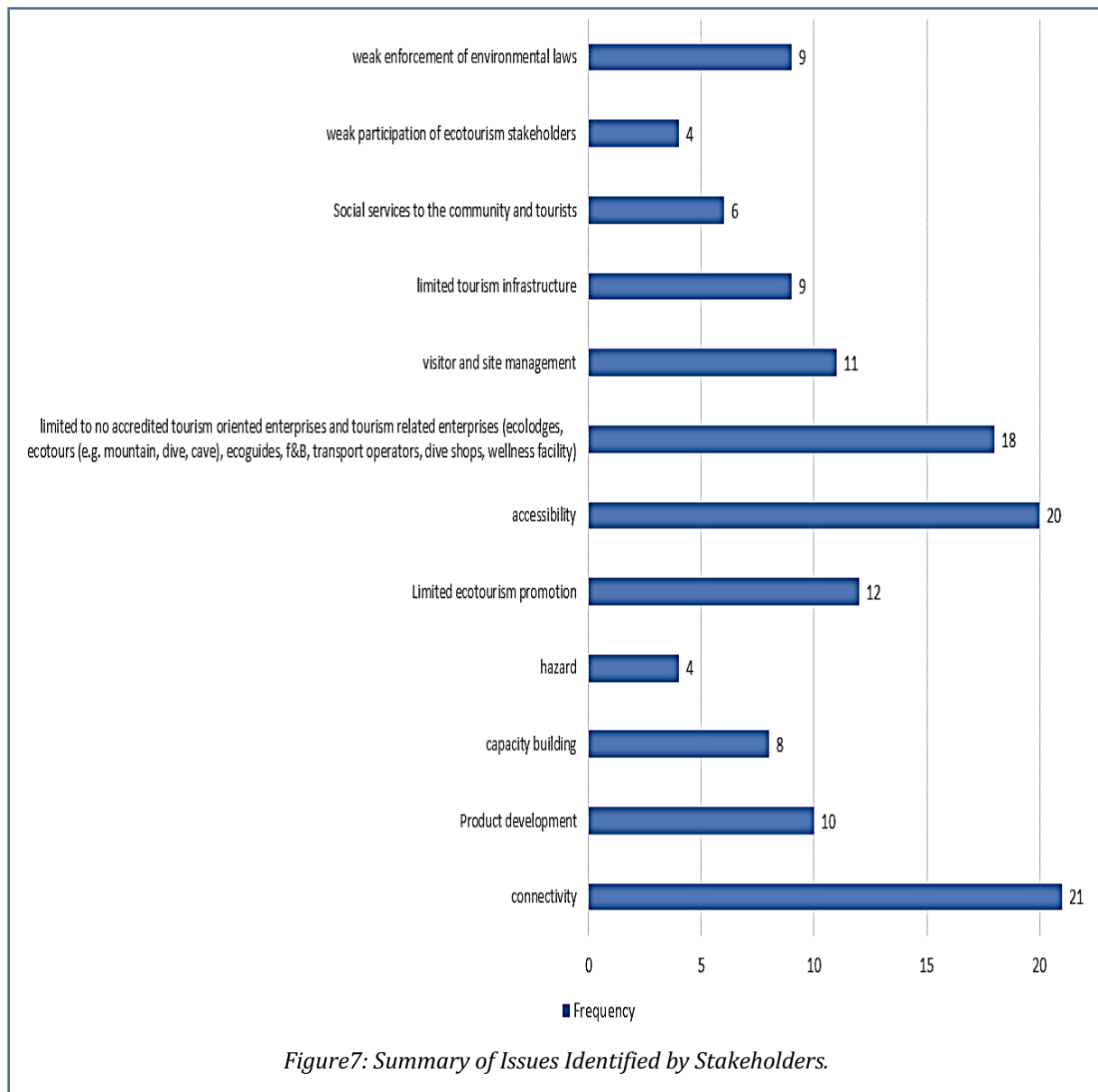
2.5. ISSUES AND CONCERNS ON ECOTOURISM DEVELOPMENT

The results of stakeholder consultations and Focus Group Discussions (FGDs) revealed that the common issues and concerns are as follows:

- 1) access (how accessible existing and proposed tourism areas are),
- 2) connectivity (by air, sea, land connectivity; telecom, Wi-Fi, and electricity),
- 3) ecotourism development concerning the tourism product portfolio of DOT, quality of services and facilities (accommodation facilities, F&B facilities, transport operator, tour operator, trade centers, etc.); and
- 4) sustainability (economic, socio-cultural, environmental).

Figure 7 shows the summary of issues and concerns identified by stakeholders, the most common development concern among stakeholders is connectivity and accessibility, where it is expected that ecotourism sites and services are easily accessible and available to ecotourists. In some cases, ecotourism development is left alone and isolated from the rest of tourism development, often relegated as an adjunct function of protected area management. This concern is also closely related to ecotourism standards and promotion. With limited accessibility and connectivity, it necessarily follows that promotion and implementing

standards would be daunting tasks at hand.



Community engagement in ecotourism is not as strong as it needs to be due to the fact that it is perceived as an activity that does not offer enough economic benefits compared to the community's traditional livelihood. For a community that benefits from the environment through extractive activities, conservation needs to be understood as a more sustainable livelihood in the long run, especially in protected areas.

To counter this unfavorable situation, the same group of stakeholders recommended the strengthening of convergence among national government agencies and LGUs to foster a more viable environment for ecotourism investment, which in this case, an expansion of national strategy for ecotourism to include non-NIPAS sites.

2.6. SUMMARY OF ISSUES AND CONCERNS

1. **Lack of Infrastructure.** Many ecotourism sites in the country lack proper infrastructure, such as access roads, electricity, and water supply. This makes it difficult for tourists to access and enjoy these sites.

While it is true that relatively less investment in infrastructure is needed for ecotourism, the impact of such investment cannot be underestimated as well. Low quality and limited provision of air, sea, and road connectivity infrastructure, particularly in the less developed destinations outside the main gateways of the country, as well as the basic destination infrastructure (including small-scale community-based infrastructure such as visitor information centers) required to support sustainable and inclusive tourism development, are among the major factors impeding the development of a more competitive ecotourism sector in the country. Fortunately, enough, the Philippine government has embarked on serious efforts to upgrade its infrastructures to boost tourism receipts. Some of the significant ongoing and planned infrastructure projects aimed at improving the country's tourism industry are as follows:

- **Build Build Build Program:** This is the flagship infrastructure program of the Philippine government, which includes the construction of new airports, seaports, highways, railways, and bridges.
- **North-South Commuter Railway:** This railway project aims to connect the cities of Manila and Clark in Pampanga province. The project is expected to reduce travel time and ease traffic congestion in the National Capital Region.
- **Metro Manila Subway:** This underground railway system aims to connect several key cities in Metro Manila and reduce the heavy traffic in the area.
- **New Clark City:** This new city is being developed as an alternative to Metro Manila and will serve as a hub for business, sports, and government.
- **Philippine National Railways South Long Haul:** This railway project aims to connect Manila to the Bicol and Sorsogon provinces in the southern part of the country.
- **Energy projects:** Several power generation projects are also underway, including the construction of new coal-fired power plants, natural gas plants, and renewable energy facilities such as wind and solar farms.

Investments in connectivity and infrastructure, along with expanded travel facilitation programs, will assist regional tourism stakeholders in scaling up and expanding the development of regional tourism products and experiences along local tourism clusters or corridors. Along tourism clusters or investment corridors, the installation of these infrastructural support facilities will also facilitate the engagement of local people in the tourism value chain.

2. **Limited Funding.** There is limited government funding and private sector investment in the ecotourism sector, which decreases the development and maintenance of ecotourism sites.
3. **Unsustainable Tourism Practices.** Some tourism operators and visitors engage in unsustainable practices, such as overfishing, littering, and damaging natural habitats, which can harm the environment and threaten the long-term viability of ecotourism.

4. **Limited Awareness and Education.** Many Filipinos are not aware of the importance of ecotourism or how to engage in sustainable tourism practices. This limits the potential for ecotourism to generate positive economic, social, and environmental impacts.
5. **Conflicting Interests.** Conflicting interests between tourism stakeholders, local communities, and conservation groups can lead to disputes over land use, resource management, and tourism development
6. **Climate Change Impacts.** Climate change poses a significant threat to the Philippines' biodiversity and natural resources, which are critical to the success of the ecotourism sector.

Climate change can influence ecotourism in several ways, including:

- **Impacts on the environment and natural resources.**³⁵ Climate change can affect the availability and quality of natural resources that are critical to the success of ecotourism. For example, changes in temperature and precipitation patterns can alter wildlife migration patterns or reduce the availability of water resources.
- **Impacts on Infrastructure.**³⁶ Climate change can also affect the infrastructure and facilities that support ecotourism activities, such as access roads, trails, and lodges. Extreme weather events, such as floods and landslides, can damage or destroy infrastructure, making it difficult for tourists to access ecotourism sites.
- **Safety Concerns.** Climate change can also create safety concerns for ecotourists, such as increased risk of natural disasters or exposure to extreme temperatures.
- **Economic Impacts.** Changes in natural resources and infrastructure can have economic impacts on the ecotourism industry, including reduced revenues, increased operating costs, and potential loss of jobs.

Being a primarily resource-based tourism product, ecotourism is highly susceptible to the impacts of climate change, presented above. Climate change impacts on ecotourism can be more pronounced in several ways:

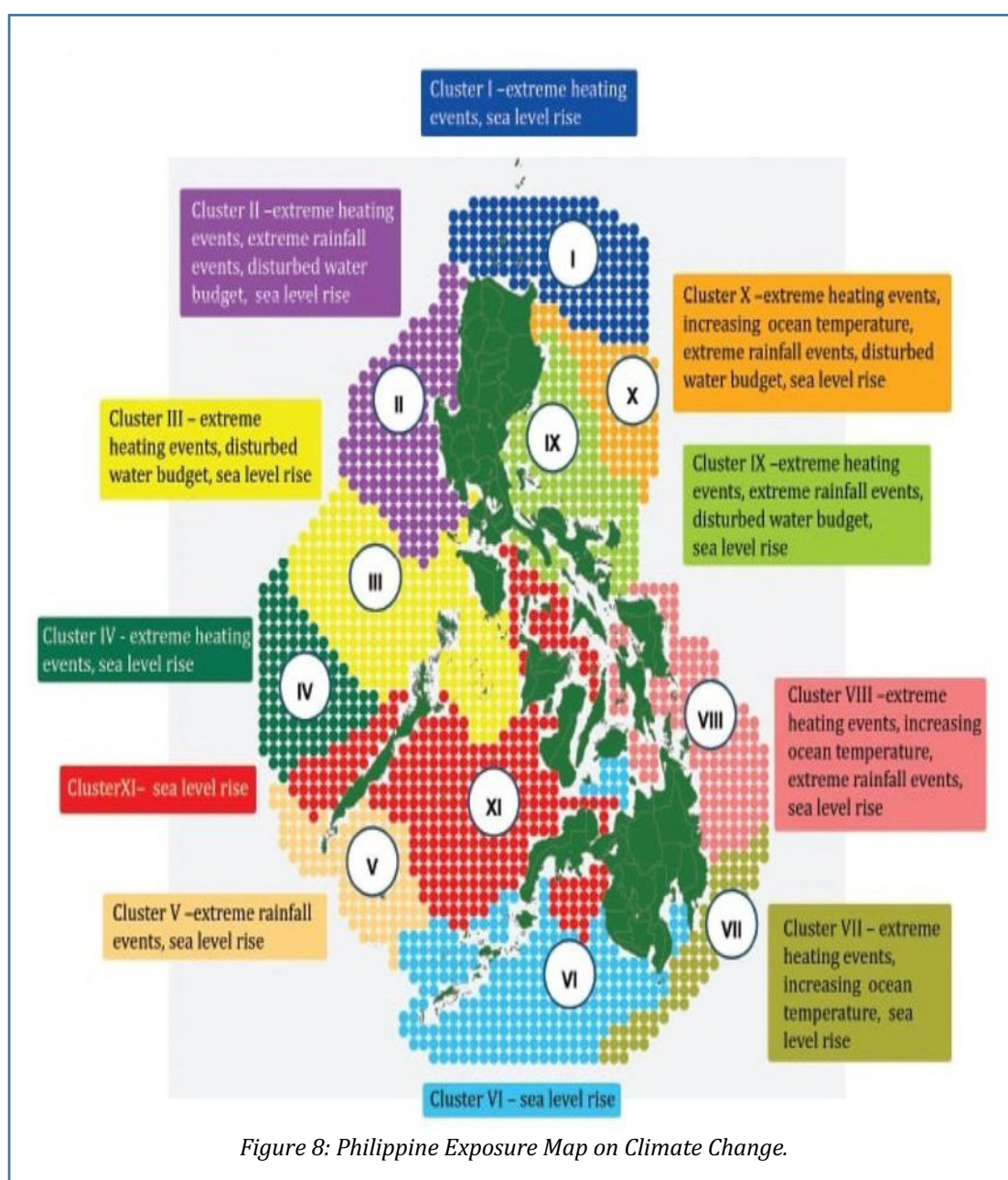
- **Changes in natural habitats:** The Philippines is considered the most diverse country on a per-hectare basis, with identified 228 key biodiversity areas (KBAs) — covering million has., including 128 terrestrial and 100 marine sites. With climate change, changes in natural habitats pose a serious threat to ecotourism resources.
- **Changes in weather patterns:** The map in Figure 8 clearly shows how changes in water patterns are an imminent threat to ecotourism resources. All

³⁵ Climatic Research Unit, University of East Anglia, "Climate Change and Its Impacts on Tourism," July 1999, https://assets.wwf.org.uk/downloads/tourism_and_cc_full.pdf.

³⁶ Purwanti Sri Pudyastuti and Nurmuntaha Agung Nugraha, "Climate Change Risks to Infrastructures: A General Perspective," AIP Conference Proceedings, June 26, 2018, 1–8, <https://doi.org/10.1063/1.5043000>.

of the country's terrestrial and marine life forms are susceptible to extreme heating events, disturbed water budgets, and increasing ocean temperatures. These patterns also exacerbate the amount of rainfall and the frequency of typhoons that the country experiences.

- **Changes in local communities:** With all these vulnerabilities unchecked, the livelihoods of local communities who depend on ecotourism for their economic well-being are severely threatened. Extreme weather events or changes in natural habitats could disrupt their ability to provide services or products that tourists rely on.



The map³⁷ (Figure 8) shows how various unique geographical variables contribute to the country's susceptibility. The map separates the country's marine regions into 11

³⁷ Max Fisher, "This Map Shows Why the Philippines Is so Vulnerable to Climate Change," Washington Post, November 12, 2013, <https://www.washingtonpost.com/news/worldviews/wp/2013/11/12/this-map-shows-why-the-philippines-is-so-vulnerable-to-climate-change/>.

zones and indicates particular dangers from climate change consequences for each of them. It highlights five major risk factors: rising sea levels, severe rainfall events, extreme heating events, rising ocean temperatures, and a disturbed water budget. With the Philippines' enormous coastlines and geographical vulnerability, any of these might be devastating. Owing to these vulnerabilities, the country's ecotourism sector is also highly vulnerable to the impacts of climate change.

The issues previously discussed above are further exacerbated by pressing concerns, such as:

- a) Inability to categorize ecotourism sites using the NES's evaluation criteria and lack of a classification framework to accredit ecotourism projects, resulting in a limited number of programs to champion ecotourism among the intended market. Currently, the DOT is implementing its Updated Progressive Accreditation System (PAS) among primary tourism enterprises, but the three-level recognition does not distinguish whether a tourism enterprise is part of an ecotourism project.
- b) Limited public sector engagement on ecotourism standards and policy formulation³⁸ and limited human resources development; and
- c) Overlapping institutional functions between the national government and LGUs results in uncoordinated and fragmented outcomes.

2.7. SWOT ANALYSIS

Considering the perception and prevailing issues and concerns among ecotourism stakeholders, the SWOT of ecotourism development can be summarized as follows:

Strengths

- o *Rich natural and cultural resources.* The Philippines is home to a diverse range of natural and cultural resources that are ideal for ecotourism, including beaches, rainforests, mountains, waterfalls, volcanoes, and historical sites.
- o *Favorable climate.* The country enjoys a tropical climate that is attractive to tourists year-round.
- o *Supportive government policies.* The national strategy for ecotourism development since the NES and subsequent NESAP, despite its recurring challenges, is an enduring commitment of the government to champion ecotourism as one of its programs.

Weaknesses

- o *Limited infrastructure.* Many of the Philippines' ecotourism destinations lack adequate infrastructure, such as roads, trails, and accommodation.
- o *Limited/Weak community participation.* Local communities are often not fully involved in the planning and implementation of ecotourism initiatives.
- o *Lack of awareness of ecotourism principles.* Many tourism operators and stakeholders are not fully aware of ecotourism principles and practices.
- o *Over Tourism.* It can pose a threat to ecotourism destinations, as it can lead to overcrowding, environmental degradation, and social and cultural conflicts.
- o *Political instability.* Political instability in some areas of the country could potentially

³⁸None among the documented and assessed pilot ecotourism projects that are managed by private sector have signified that they have been in one way or another actively involved in any forum or discussion about policy or program formulation on ecotourism. While the original NES have stressed enough on the pivotal role of private sector participation in ecotourism development, opportunities have not yet been fully utilized to this end.

deter tourists and discourage investment in ecotourism development.

Opportunities

- *Growing awareness of ecotourism.* There is a growing awareness of ecotourism among both domestic and international tourists.
- *Growing demand for ecotourism.* The global demand for ecotourism is growing, and the Philippines is well-positioned to capitalize on this trend.
- *Emerging markets.* There is growing interest in ecotourism from emerging markets, such as China, Japan, South Korea, and India.
- *Public-private partnerships.* Public-private partnerships can help to finance and implement ecotourism development projects.
- *New technologies.* New technologies, such as social media and online booking platforms, can help to promote and market ecotourism destinations and products.

Threats

- *Climate change.* Climate change is a major threat to ecotourism development in the country, as it could lead to more extreme weather events and damage to natural ecosystems.
- *Environmental challenges.* The country faces several environmental challenges, such as pollution, deforestation, and climate change, which can threaten ecotourism development.
- *Economic downturn.* An economic downturn due to a global crisis such as the previous pandemic could lead to a decrease in tourist arrivals, which would hurt the ecotourism sector.

2.8. ISSUES AND CONCERNS ON ECOTOURISM GOVERNANCE FRAMEWORK OF PHILIPPINE ECOTOURISM

The Executive Order 111, s. 1999 established the National Ecotourism Strategy (NES) to provide a comprehensive plan for the development of ecotourism in the Philippines. The NES is implemented by the National Ecotourism Development Council (NEDC), the National Ecotourism Steering Committee (NESC), and the Regional Ecotourism Committees (RECs).

The NEDC is the policy-making body for ecotourism, co-chaired by the Secretaries of the DOT and the DENR. They are joined by the Secretaries of the Department of Interior and Local Government (DILG), the Department of Trade and Industry (DTI), the Department of Finance (DOF), the National Economic Development Authority (NEDA), the Department of Education (DepEd), and representatives from the private sector and the non-government organization (NGO).

The NESC is responsible for formulating and developing the NES, as well as monitoring and evaluating its implementation. Meanwhile, the RECs are responsible for implementing the NES at the regional level. EO 111 also established the Ecotourism Technical Working Group (ETWG) to provide technical and administrative support to the NEDC and the NESC. The NEDC, the NESC, the RECs, and the ETWG are collectively known as the EO 111 Bodies.

The NESC serves as the working committee of the NEDC. It shoulders a range of responsibilities, including:

- Reviewing progress reports from RECs and other implementing agencies to ensure

consistent progress towards ecotourism goals.

- Advocating for the key site's concept and promoting banner sites as images for international and domestic tourism promotion.
- Approving action plans for ecotourism development in the key sites to ensure strategic and aligned development efforts.
- Encouraging RECs to undertake product development and marketing within and along the networks of key sites to enhance the ecotourism experience.
- Undertaking assessment of projects for accreditation to maintain quality standards and adherence to ecotourism principles.
- Approving major ecotourism projects to ensure alignment with national ecotourism strategies and guidelines.
- Lobbying for the enactment of legislation in support of ecotourism to strengthen the legal framework for ecotourism development.
- Coordinating with concerned agencies, institutions, and organizations in the implementation of the NES to foster collaboration and synergy among stakeholders.

The RECs, on the other hand, are responsible for:

- Preparing action plans for ecotourism development at key sites for approval by the NESC.
- Promoting and advocating for the key sites in coordination with concerned agencies, institutions, and organizations.
- Providing advice and assistance in the development of key sites.
- Approving minor ecotourism projects.
- Recommending legislation, agenda, and proposals to the NESC in support of ecotourism development.
- Lobbying for the enactment of ordinances and resolutions in support of ecotourism at the local level.

The ETWG is tasked with helping the NESC and the RECs carry out their responsibilities and implement the NES. At the national level, the ETWG provides technical and administrative support to the NEDC and NESC in implementing EO 111. The ETWG and the NESC have added members to the bodies as needed. In relation to the NES, the ETWG provides technical assistance to different projects in coordination with a pool of experts, as needed.

The NES uses a combination of top-down and bottom-up approaches to achieve its goals and objectives.

The top-down approach involves the central government assisting local communities to develop ecotourism. The EO 111 Bodies, and the RECs, play a key role in the top-down process. The EO 111 Bodies focus on developing, managing, and marketing a network of key ecotourism sites. They also set standards to regulate and monitor ecotourism operations. The bottom-up approach involves supporting community-led ecotourism initiatives. The NES aims to create mechanisms for nurturing ecotourism development through community initiatives, local entrepreneurship, and private-sector participation.

The NES is also anchored on the key site approach. This means that the NES focuses on developing ecotourism in some specific locations that have been selected based on established criteria. The NESC and RECs work with various institutions, donors, and other agents of development to formulate and implement action plans for the key sites.

The DOT and DENR partnership advocates for ecotourism in key sites and provides technical assistance to local communities. The DOT is responsible for international and domestic promotion, planning and product development, training, and awareness. Meanwhile, the DENR handles resource management, livelihood programs, extension services, training, monitoring, and managing impacts. Figure 9 illustrates this institutional arrangement.

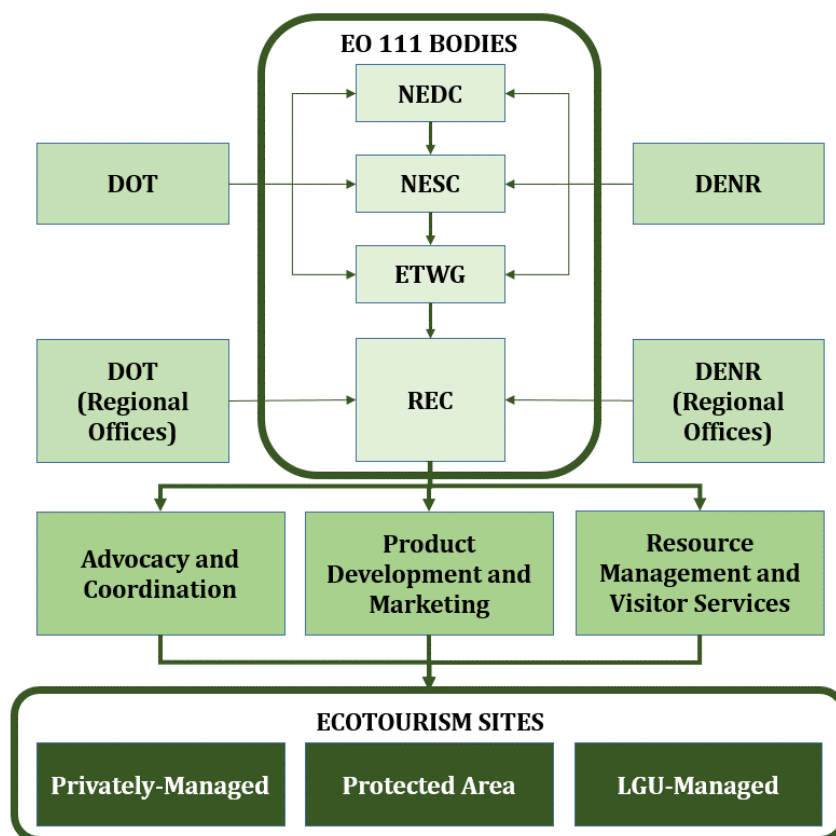


Figure 9: Ecotourism Institutional Framework (EO 111).

Figure 9 emphasizes that the EO111 Bodies are not entirely focused on ecotourism sites in protected areas but are also involved in the development of LGU-managed and privately managed sites. As co-chairs, DOT and DENR have an informal arrangement concerning ecotourism sites prioritized for development support. DENR, understandably, is focused on ecotourism in protected areas. DOT tends to focus on supporting the development of LGU-managed and the promotion of private investments in ecotourism sites. The arrangement does not mean that the dichotomy is reflected in ecotourism policies. It is only an observation due perhaps to ease of administration. For all sites, the other members of EO bodies are requested to support technically.

Table 6 summarizes the institutional roles in ecotourism governance as defined in the NES. However, what is glaring is that there are no clear roles for the non-government organizations and the private sector.

Table 6: Institutional Roles on Ecotourism

Agencies	Roles
Department of Tourism	Product development and marketing of ecotourism sites
Tourism Infrastructure and Enterprise Zone Authority (TIEZA)	Replacing the Philippine Tourism Authority (PTA). TIEZA is mandated to continue the functions previously exercised by PTA under Presidential Declaration 564, unless otherwise inconsistent with the provisions of RA 9593. acts as the Department of Tourism's implementing arm in providing support infrastructures and facilitating investments in tourism enterprise zones (TEZ) nationwide
Philippine Tourism Promotions Board (PTPB)	A reorganized Philippine Convention and Visitors Corporation (PCVC) under Republic Act No. 9593 otherwise known as the Tourism Act of 2009; PTPB exists to market and promote the country domestically and internationally as a world-class tourism and MICE destination, in strategic partnership with private and public stakeholders to deliver a unique high-value experience for visitors, significantly contributing to increased arrivals, receipts, and investments to the country.
Department of Environment and Natural Resources (DENR)	Mandated by EO 192 to conserve, manage, and develop the Philippines' environment and natural resources including its territorial waters and lands of public domain. The DENR oversees bureaus that ensure the sustainable management of natural areas.
Department of Education	To raise awareness of the need for environmental protection and cultural heritage protection, and to foster social cohesion and national unity among Filipinos.
Department of Finance	To develop an incentive program for ecotourism to stimulate local communities and the private sector.
Department of Trade and Industry	To foster the development of indigenous products that can be promoted and marketed internationally.
National Commission on Indigenous People (NCIP)	To help ensure the needs of local people are incorporated into ecotourism planning
National Commission for Culture and the Arts (NCCA)	To support conservation of the cultural heritage resource base of ecotourism
National Economic and Development Authority (NEDA)	To provide the policy and enabling climate for ecotourism to develop in consonance with Ambisyon Natin 2040
Department of the Interior and Local Government (DILG)	To ensure that LGUs play a key role in developing ecotourism programs
LGUs	Tourism facilities and other tourist attractions, including the acquisition of equipment, regulation and supervision of business concessions, and security services for such facilities including tourism development and promotion programs delegated to the local governments (LGC 1991 Ch 2 Sec 17)
NGOs	No clear roles
Private Sector	No clear roles

INSTITUTIONAL CHALLENGES

Javier in his paper presented at the JSPS AA Science Platform Program Conference, noted that one aspect of ecotourism governance that has been debated is the question of how to best involve national, local, private, and community actors. The NES reflects a state-led approach, with the DOT and the DENR playing a central role. However, the NES is a non-statutory process, which means that it is not legally binding. To make the NES effective, agreements must be forged with local governments.³⁹

The Local Government Code (LGC) of 1991 provides a framework for decentralization and local autonomy. The LGC states that the national government shall facilitate the realization of local autonomy through improved coordination of national government policies and programs and extension of adequate technical and material assistance to less developed and deserving local government units. Further, the national government shall ensure that decentralization contributes to the continuing improvement of the performance of local government units and the quality of community life.

In the context of ecotourism governance, the LGC provides a basis for a collaborative approach that engages all stakeholders at the national, local, private sector, and community levels. However, it is important to note that the LGC is a complex piece of legislation, and there is still some debate about how to best implement its provisions in a way that promotes sustainable ecotourism development.

The EO 111, s.1999 provided a supporting institutional mechanism for ecotourism development in the Philippines. It guided the two lead agencies, the DOT and DENR, about how to allow and manage tourism activities while protecting, conserving, and rehabilitating the natural resources on which the ecotourism product is anchored.

There is, however, confusion on who and how to develop ecotourism sites in local destinations. Primarily, it is the LGUs' role to develop and manage these products. However, issues arise when ecotourism activities are located in protected areas that are managed by DENR. Privately owned properties will also present issues, especially concerning the classification of sites and activities that are contrary to the concept of ecotourism.

The provisions in EO111, s.1999 with regards to regulation and development do not exist or are not clear. The NEDC remains to be seen as an advisory and policy development council. It is up to the administrative powers of the DENR and LGUs, and in some ways, of the DOT, on how to manage the ecotourism sites.

Another concern in ecotourism governance is the classification framework from which ecotourism programs and sites could be categorized and subsequently accredited.

There is a need to revisit the accreditation system for ecotourism. There has been an instrument to govern the accreditation of eco guides, ecotours, ecolodges, and ecotour facilities supposedly issued by DOT back in 2008. The instrument was integrated with the National Accreditation System (NAS), and subsequently on the Progressive Accreditation System⁴⁰ (PAS). However, specific ecotourism-related entities are subsumed by a much larger accredited category group or has been renamed without the ecotourism or “eco” prefix. In the online accreditation portal, there is no explicit ecotourism category, so potential

³⁹ Dr Aser B. Javier is Associate Professor at the Institute of Development Management and Governance of the College of Public Affairs (IDMG-CPAf), University of the Philippines Los Banos (UPLB)

⁴⁰ DOT Memorandum Circular No. 2023 – 0003 Updated Guidelines on the Progressive Accreditation System, dated 31 May 2023

entities must apply for the following:

- Ecoguide – Tour Guide (primary accreditation); mostly community guides
- Ecotour – No list
- Ecolodge – Possible for Mabuhay Accommodation or resort (primary accreditation)
- Ecotour Facilities – Possible for Resort (primary accreditation), or Farm Tourism

Notably, ecotourism facilities and services have the potential to be included as primary enterprises and therefore required to secure accreditation from the Department of Tourism (DOT) for issuance or renewal of a license or permit to operate following the Tourism Act of 2009 (RA 9593) and the DILG Memo Circular No 2019-17 (Reiteration of Republic Act No. 9593 or the ‘Tourism Act of 2009’, Chapter 1 Section 122 Accreditation).

At present, eco-guides get accreditation as community guides. There is no explicit notation that the latter is an eco-guide. Ecotourism-related accommodations can be DOT-accredited as Mabuhay accommodation or resort. Ecotourism sites can also be accredited as farm tourism sites if they have components that will pass this accreditation category. Without explicit accreditation, ecotourism enterprises and service providers are not recognized as separate and specialized products.

While there is already a global consensus on what an ecotourism project entails, a national classification system would have been useful in ensuring that the quality and commitment to ecotourism principles are consistent across all ecotourism sites in the country. An ecotourism statistical framework was adopted by the NEDC in 2023 following a series of consultations and pilot testing. It is expected that data and statistics on ecotourism will be easily collated and managed now that a statistical framework is in place, upon which the ecotourism enterprises could pattern their data collection. But yet another hurdle in ecotourism governance presented itself, born out of a lack of institutionalized tourism offices in most LGUs. These governance flaws further impede the growth of the ecotourism sector, contrary to what the NES envisioned.

Ideally, the entire tourism industry is private-led and government supported, this should also be true in the ecotourism sector. In the country, while much has been done to involve the private sector in ecotourism projects, there is much to be desired from private sector investment in ecotourism development. Although the NEDC adopted a more inclusive definition of ecotourism to include heritage, agricultural, and cultural ecotourism; the implementation of development programs has been focused mainly on protected areas under NIPAS. For instance, there have been no interventions to ecotourism sites managed by LGUs and that of the private sector, as far as NESAP is concerned. This inadvertently did not capture non-NIPAS ecotourism sites' milestones and challenges, thus making statistical data needed for ecotourism planning limited. Ecotourism has been focused mainly on sites within the protected areas. While the NES 2002-2012 and subsequent NESAP 2013 - 2022 identified even those non-NIPAS sites as ecotourism resources, the majority of documented success stories relating to ecotourism are under NIPAS, with little to no documentation on LGU-managed or privately managed ecotourism programs at all.

This seemingly limited engagement of the private sector in ecotourism is because much of the ecotourism projects in the country are mainly within the protected areas, with stringent and limited development options for the private sector. In some cases, investors are hampered by the uncertainty of the status of lands available for productive investments, and inconsistency in regulations on access to natural resources, particularly in the absence of updated management zones or overlapping management control between protected area management and ancestral domains. This inadvertently makes investors unsure about who makes the final decision on access rights and under which legal framework — NIPAS, IPRA,

Forestry Code, or Public Land Act.⁴¹

Site and visitor management in ecotourism sites are another enduring challenge of ecotourism in the country. For one, many of the identified ecotourism sites across the country have no carrying capacity study in place. Imposing limits among ecotourism sites across the country is very challenging. For ecotourism site managers, limiting numbers in a country with a large domestic population seems absurd and problematic. Often, imposing fees to restrict numbers is viewed as elitism and prejudicial against general equality. Limits of acceptable change and carrying capacity are crucial management tools, but they are difficult to use due to the absence of ecological system information and widely acknowledged indicators of carrying capacity. Lack of knowledge on carrying capacity in ecotourism sites compounds the issues of building them⁴². Aspects of carrying capacity involve the physical, biological, psychological, and social capacities. All of these are directly related to site visitors at a given time, thus:

- Physical is the actual number of visitors a site can accommodate at a given time;
- At the biological threshold, environmental deterioration becomes either irreversible or intolerable;
- Psychological is the moment at which travelers perceive that the amount of other tourists and/or their actions diminish the quality of their experience, and
- Social refers to the degree to which the residents of the location (perhaps the tourist attraction itself) feel disturbed or invaded.

Hence, carrying capacities include both qualitative and quantitative factors, and there is no "right" number for a site. There is also a cultural aspect that must be emphasized; various cultures may have a distinct understanding of psychological and social carrying capacity, as well as physical and biological carrying capacity. One culture may have a different tolerance for crowding from that of another. The study must be conducted on the carrying capacity of specific locations to inform management choices and the intended market must be carefully evaluated.

Still part of the challenges in site and visitor management, the ecotourism sector faces several obstacles, when contrasted with the demand-focused management orientation of the tourism industry. Libosada in his exploration of the dichotomy of sustainable tourism, recognizes that tourism is a market-driven industry that has responded to market demand, focused on fostering, sustaining, and expanding the market rather than preserving the product or experience⁴³. To keep visitors coming, amenities, infrastructure, and other 'attractions' are often added, resulting in a disconnect between the tourist experience and the original destination. Ecotourism's challenge is to prevent this process and concentrate on preserving the experience. Given the primacy of environmental and ecological issues, ecotourism can only go so far, and not nearly as far as other types of tourism. A supply-oriented management viewpoint prioritizes the nature and resilience of the resource, cultural or local community preferences, and educational and conservation programs.

While ecotourism can be still considered in its nascent stage in the country, stringent

⁴¹ Mark van Steenwyk, "Integrated Natural Resources and Environmental Management Project (RRP PHI 41220) Institutional Analysis PHI: Integrated Natural Resources and Environmental Management Project," October 2012, <https://www.adb.org/sites/default/files/linked-documents/41220-013-phi-oth.pdf>.

⁴²For ecotourist and ecotourism managers, the readily available reference to determine the carrying capacity of an ecotourism site is the ecotourism management plan (EMP) specifically prepared for such site. Among the existing ecotourism projects in the country, it is only the protected areas which can be expected to have an EMP, and of the 248 listed PAs, a mere 34% have an existing EMP. This situation often left ecoguides and site managers improvising on site and visitor management

⁴³Carlos M. Libosada Jr., "Business or Leisure? Economic Development and Resource Protection-Concepts and Practices in Sustainable Ecotourism," *Ocean & Coastal Management* 52 (April 7, 2009): 390–94, <https://doi.org/10.1016/j.ocecoaman.2009.04.004>.

standards, based on ethical considerations are best to be put in place early on. This is to guide operators and those still planning to venture into ecotourism to comply with standards or to continue in the separate industry category, and be obliged not to misappropriate ecotourism, by opting for nature tourism or other more generalized classifications. Ecotourism is not necessarily sustainable tourism. Sustainable ecotourism balances economic, environmental, and social aims within a moral framework. Ecotourism is growing fastest. Unfortunately, the fast growth undermines ecotourism's sustainability and contribution to sustainable development. Ecotourism cannot maintain big populations without causing succession and change, which kills its purpose. Controls, boundaries, ethics, and behavior are essential to a healthy ecotourism economy.



Strategic Goals and Programs

3. ECOTOURISM DEVELOPMENT FRAMEWORK

The Philippine ecotourism development framework aims to harmonize tourism development and economic growth with environmental conservation and community well-being. By adopting sustainable practices and actively involving local communities, the country aspires to build a responsible tourism industry that protects its natural and cultural heritage for the future. This framework is structured using the logical framework approach,

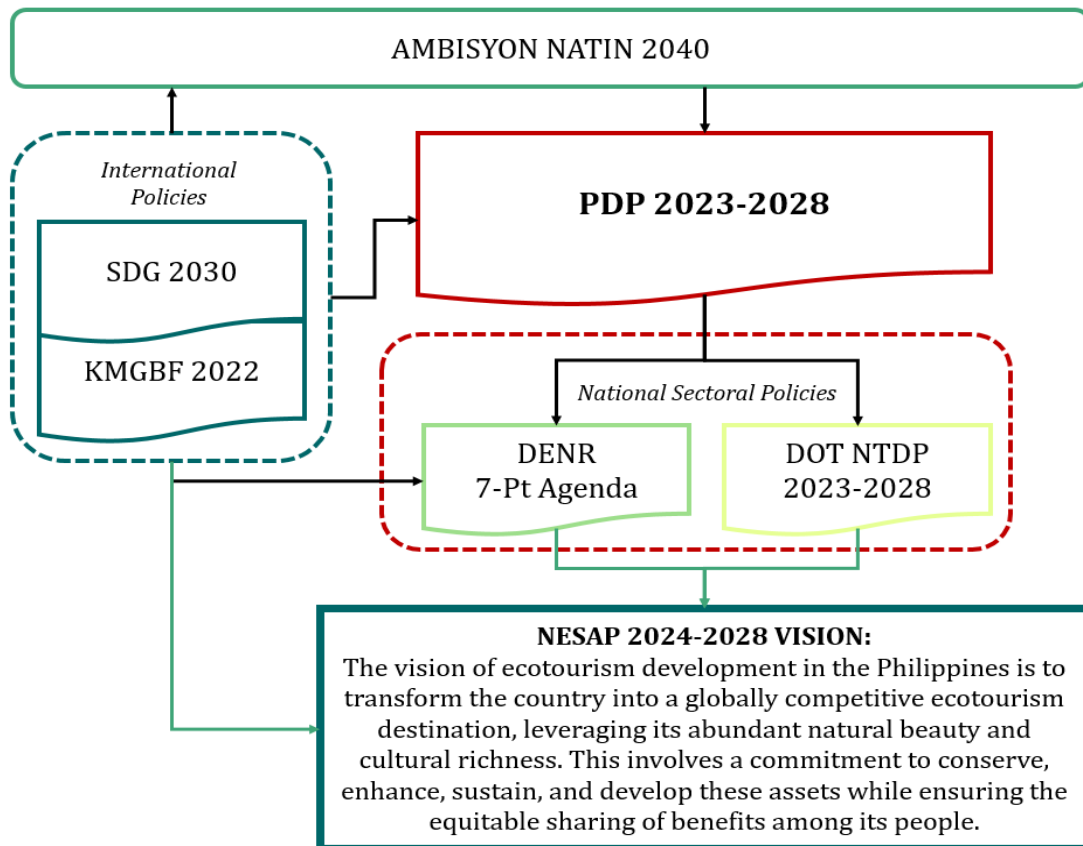


Figure 10: NESAP 2024 - 2028 Alignment Framework.

encompassing goals, objectives, outputs, and activities while aligning with global commitments to sustainable development and biodiversity conservation, to which the Philippines is dedicated.

Aligning national strategies on ecotourism development with international commitments to biodiversity conservation and sustainable development is crucial for ensuring a sustainable ecotourism sector that protects the environment and preserves biodiversity. Several international agreements and frameworks emphasize the importance of sustainable tourism and biodiversity conservation, in particular, the Sustainable Development Goals 2030 and the Kunming-Montreal Global Biodiversity Framework 2022 (see Figure 10). The same international policies guided the national vision and the current national and sectoral plans.

Table 7 specifies the alignment per strategic objectives of the NESAP 2024 – 2028.

NESAP 2024-2028 STRATEGIES	KM-GBF	SDG	PDP 2023-2028	NTDP 2023-2028	DENR 7 point Agenda
S1. Develop and market multidimensional and competitive ecotourism products anchored on Filipino culture and values.	Goal A	SDG 8 SDG 9	Chapter 7 — Reinvigorate Services	Goal 1; Goal 2; Goal 3; Goal 4; Goal 5; Goal 6	Agenda 2 Agenda 3
S2. Develop and manage resilient, and climate change-responsive infrastructures and mechanisms for ecotourism sites.	Goal A	SDG 13	Chapter 15 — Accelerate Climate Action And Strengthen Disaster Resilience	Goal 1; Goal 5; Goal 7	Agenda 1, Agenda 2, Agenda 3, Agenda 4, Agenda 5
S3. Promote ecotourism investment, sustainable financing, and digital transformation.	Goal B	SDG 8 SDG 9	Chapter 9 — Promote Trade And Investments	Goal 1; Goal 4; Goal 6	Agenda 1,
S4. Maximize environmental, economic, and socio-cultural benefits to the host communities.	Goal C	SDG 1 SDG 8	Chapter 2 — Promote Human and Social Development, Subchapter 2.3 Establish Livable Communities; Chapter 4 — Increase Income-earning Ability	Goal 3; Goal 4; Goal 6	Agenda 7
S5. Promote a culture of ecotourism, and establish partnerships.	Goal D	SDG 12 SDG 17	Chapter 15 — Accelerate Climate Action And Strengthen Disaster Resilience	Goal 2; Goal 3; Goal 5; Goal 6; Goal 7	Agenda 3, Agenda 4, Agenda 6
S6. Strengthen institutional capacity and ecotourism governance.	Goal D	SDG 16 SDG 17	Chapter 14 — Practice Good Governance And Improve Bureaucratic Efficiency	Goal 7	Agenda 2
S7. Monitor outcomes and impacts.	Goal F	SDG 17	Chapter 14 — Practice Good Governance And Improve Bureaucratic Efficiency	Goal 7	Agenda 7

THE PDP 2023 – 2028 AND NESAP 2024 – 2028

The National Ecotourism Strategy and Action Plan (NESAP) 2024-2028 and the Philippine Development Plan (PDP) 2023-2028 are closely aligned in their goals and strategies. Both plans recognize ecotourism as a key sector for achieving economic growth, poverty reduction, and sustainable development.

The NESAP's strategies directly support the PDP's objectives in several areas:

Chapter 2: Promote Human and Social Development

Subchapter 2.3: Establish Livable Communities

The NESAP's strategies of **developing and marketing diversified competitive ecotourism products anchored on Filipino culture and values** (Strategy 1) and **maximizing environmental, economic and socio-cultural benefits to host communities** (Strategy 4) align with the PDP's goal of establishing livable communities. Ecotourism has the potential to create jobs and opportunities for local communities, leading to improved living standards and overall well-being.

Chapter 4: Increase Income-earning Ability

The NESAP's strategies of **Promoting ecotourism investment, establishing sustainable financing, and digital transformation** (Strategy 3), and **maximizing environmental, economic and socio-cultural benefits to host communities** (Strategy 4) align with the PDP's goal of increasing income-earning ability. Ecotourism can generate income for local communities through various means, such as employment in tourism-related businesses and the sale of locally produced goods and services.

Chapter 7: Reinvigorate Services

The NESAP's strategy of **promoting a culture of ecotourism and establishing partnerships** (Strategy 5) aligns with the PDP's goal of reinvigorating services. By promoting ecotourism awareness and fostering collaboration among stakeholders, the NESAP contributes to the development of a thriving ecotourism sector.

Chapter 14: Practice Good Governance and Improve Bureaucratic Efficiency

The NESAP's strategy of **strengthening institutional capacity and ecotourism governance** (Strategy 6) and **Monitoring Outcomes and Impacts** (Strategy 7) aligns with the PDP's goal of practicing good governance and improving bureaucratic efficiency. By strengthening ecotourism governance, through multi-sectoral and inter-agency collaboration and partnerships, the NESAP helps to promote effective and efficient governance.

Chapter 15: Accelerate Climate Action and Strengthen Disaster Resilience

The NESAP's strategy on **developing and managing resilient and climate-responsive infrastructures and mechanisms for ecotourism sites** (Strategy 2) complements the strategies on accelerating climate action and strengthening disaster resilience. By promoting sustainable practices in ecotourism development, the activities espoused under strategy 2 of the NESAP 3 play a vital role in the effective management, conservation, and protection of natural ecosystems and in reducing the sector's vulnerability to climate change impacts.

In addition to these specific alignments, the NESAP also aligns with the country's overarching long-term vision of Ambisyon Natin 2040, which envisions a "Matatag, Maginhawa, at Panatag na buhay" (a strongly rooted, comfortable, and secure life) for every Filipino. The NESAP contributes to this vision by a) creating jobs and opportunities for local communities particularly the marginalized and underprivileged; b) protecting the environment and its resources; and c) ensuring responsible and sustainable ecotourism development.

The adoption of the whole-of-society approach in the implementation of NESAP will be pivotal in realizing the outcomes espoused in the PDP and other relevant sectoral plans.

THE NTDP 2023 – 2028 AND NESAP 2024 – 2028

The NESAP 2024 – 2028 and the NTDP 2023 – 2028 work in harmony to advance a sustainable and inclusive ecotourism sector in the Philippines. While the NTDP 2023 – 2028 broadly recognizes ecotourism's role in sustainable development, both plans converge on several key areas:

- **Sustainable ecotourism practices:** Both plans promote responsible ecotourism practices that minimize negative impacts on the environment and ensure the conservation of natural resources.
- **Community engagement and benefits:** Both plans recognize the critical role of local communities in ecotourism development and emphasize maximizing economic benefits for host communities.
- **Institutional capacity building:** Both plans acknowledge the need for strengthening institutional capacity to effectively manage and promote ecotourism.
- **Monitoring and evaluation:** Both plans emphasize the importance of monitoring and evaluating ecotourism initiatives to assess their effectiveness and identify areas for improvement.

Table 8 defines the alignment between the NESAP 2024 - 2028 strategies with the tourism development agenda of the NTDP 2023 – 2028.

Table 8: Alignment of NESAP 2024 - 2028 to the NTDP 2023 - 2028	
NESAP 2024 – 2028 Strategies	NTDP 2023 – 2028 Strategic Goals
S1. Develop and market multidimensional and competitive ecotourism products anchored on Filipino culture and values.	Goal 1 — Improvement of Tourism Infrastructure and Accessibility
	Goal 2 — Cohesive and Comprehensive Digitalization and Connectivity
	Goal 3 — Enhancement of Overall Tourist Experience
	Goal 4 — Equalization of Tourism Product Development and Promotion
	Goal 5 — Diversification of Portfolio through multidimensional Tourism
	Goal 6 — Maximization of Domestic and International Tourism
S2. Develop and manage resilient, and climate change-responsive infrastructures and mechanisms for ecotourism sites.	Goal 1 — Improvement of Tourism Infrastructure and Accessibility

	<p>Goal 5 — Diversification of Portfolio through Multidimensional Tourism</p> <p>Goal 7 — Strengthening tourism governance through close collaboration with national and local stakeholders</p>
S3. Promote ecotourism investment, sustainable financing, and digital transformation.	<p>Goal 1 — Improvement of Tourism Infrastructure and Accessibility</p> <p>Goal 4 — Equalization of Tourism Product Development and Promotion</p> <p>Goal 6 — Maximization of Domestic and International Tourism</p>
S4. Maximize environmental, economic, and socio-cultural benefits to the host communities.	<p>Goal 3 — Enhancement of Overall Tourist Experience</p> <p>Goal 4 — Equalization of Tourism Product Development and Promotion</p> <p>Goal 6 — Maximization of Domestic and International Tourism</p>
S5. Promote a culture of ecotourism, and establish partnerships.	<p>Goal 2 — Cohesive and Comprehensive Digitalization and Connectivity</p> <p>Goal 3 — Enhancement of Overall Tourist Experience</p> <p>Goal 5 — Diversification of Portfolio through multidimensional Tourism</p> <p>Goal 6 — Maximization of Domestic and International Tourism</p> <p>Goal 7 — Strengthening tourism governance through close collaboration with national and local stakeholders</p>
S6. Strengthen institutional capacity and ecotourism governance.	<p>Goal 7 — Strengthening tourism governance through close collaboration with national and local stakeholders</p>
S7. Monitor outcomes and impacts.	<p>Goal 7 — Strengthening tourism governance through close collaboration with national and local stakeholders</p>

The NESAP 2024 – 2028 and NTDP 2023 – 2028 share a commitment to fostering a thriving ecotourism sector that contributes to the nation's economic growth, environmental well-being, and social progress. The ambitious targets set by the NTDP—34.7 million tourism jobs and 51.9 million international arrivals by 2028⁴⁴—are complemented by NESAP's goal to contribute at least 5% to these targets, demonstrating a united effort towards a brighter future for tourism in the Philippines.

⁴⁴https://beta.tourism.gov.ph/news_and_updates/pbbm-approval-of-phl-tourism-plan-to-spur-tourism-transformation-employment/

THE DENR THRUSTS AND NESAP 2024 – 2028 STRATEGIES

Table 9: Alignment of DENR's Thrust and NESAP 2024 – 2028	
DENR THRUSTS AND PRIORITY PROGRAMS	NESAP 2024 – 2028 STRATEGIES
1. Climate Risk Lens in National Planning and Policies	<p>S2. Develop and manage resilient, and climate change-responsive infrastructures and mechanisms for ecotourism sites.</p> <p>S3. Promote ecotourism investment, sustainable financing, and digital transformation.</p>
2. Increased Forest Cover	<p>S1. Develop and market multidimensional and competitive ecotourism products anchored on Filipino culture and values.</p> <p>S2. Develop and manage resilient, and climate change-responsive infrastructures and mechanisms for ecotourism sites.</p> <p>S6. Strengthen institutional capacity and ecotourism governance.</p>
3. Conservation of Protected Areas and Biodiversity Resources	<p>S1. Develop and market multidimensional and competitive ecotourism products anchored on Filipino culture and values.</p> <p>S2. Develop and manage resilient and, climate change-responsive infrastructures and mechanisms for ecotourism sites.</p> <p>S5. Promote a culture of ecotourism, and establish partnerships.</p>
4. Improved Air, Water Quality, and Waste Management	<p>S2. Develop and manage resilient, and climate change-responsive infrastructures and mechanisms for ecotourism sites.</p> <p>S5. Promote a culture of ecotourism, and establish partnerships..</p>
5. Water Security and Resilience in High Water-Stressed Areas	S2. Develop and manage resilient, climate change-responsive infrastructures and mechanisms for ecotourism sites.
6. Sustainable and Reasonable Management of Mineral Resources	S5. Promote a culture of ecotourism, and establish partnerships.
7. Ethical Stewardship	<p>S6. Strengthen institutional capacity and ecotourism governance.</p> <p>S7. Monitor outcomes and impacts.</p>

This alignment (see Table 9) highlights the complementary nature of the DENR's Thrusts and the NESAP 2024 – 2028 Strategies. Both initiatives emphasize the importance of:

Climate Change Resilience: Integrating climate risk assessment and adaptation measures into ecotourism planning and development.

Sustainable Ecotourism Practices: Promoting responsible ecotourism practices that minimize environmental impacts and contribute to conservation efforts.

Community Engagement and Benefits: Maximizing economic benefits for host

communities and fostering community participation in ecotourism development

Institutional Capacity Building: Strengthening institutional frameworks and expertise to effectively manage and promote ecotourism.

Monitoring and Evaluation: Continuously monitoring and evaluating ecotourism initiatives to assess their effectiveness and identify areas for improvement.

THE KUNMING-MONTREAL GLOBAL BIODIVERSITY FRAMEWORK (GBF) AND NESAP 2024 - 2028 STRATEGIES

The Kunming-Montreal Global Biodiversity Framework (GBF) is a comprehensive agreement adopted by the Parties to the Convention on Biological Diversity (CBD) in 2022. It outlines a set of goals and targets to halt and reverse biodiversity loss by 2030, and to ensure that all people have access to nature's benefits.

One of the key goals of the GBF is to promote sustainable ecotourism. Ecotourism is a form of tourism that is designed to minimize negative impacts on the environment and to support local communities. Ecotourism can be a valuable tool for conservation and sustainable development, but it is important to ensure that it is carried out responsibly.

The NESAP 2024 – 2028 and the GBF are aligned in their goals and objectives (see Table 10). Both frameworks emphasize the importance of sustainable ecotourism and the need to ensure that it benefits local communities and contributes to conservation. The NESAP 2024 – 2028 also aligns with the GBF's goals of promoting sustainable tourism and ensuring that all people have access to nature's benefits.

The NESAP 2024 – 2028 and the GBF can be seen as complementary frameworks that can work together to promote sustainable ecotourism development in the Philippines.

By implementing the NESAP 2024 – 2028, the Philippines can make a significant contribution to the GBF's goals of halting and reversing biodiversity loss. In addition to the NESAP 2024 – 2028, several other initiatives in the Philippines are also aligned with the GBF's goals. These include the DENR's National Biodiversity Strategy and Action Plan (NBSAP).

<i>Table 9: Alignment of NESAP 2024 - 2028 and the KM-GBF</i>		
NESAP STRATEGY	KUNMING-MONTREAL GLOBAL BIODIVERSITY FRAMEWORK (KMGBF) GOALS AND TARGETS	ALIGNMENT
S1. Develop and market multidimensional and competitive ecotourism products anchored on Filipino culture and values. S2. Develop and manage resilient, and climate change-responsive infrastructures and mechanisms for	Goal A: Nature's Contributions to People (NCP)	Promotes sustainable use of biodiversity and ecosystem services through ecotourism. Enhances appreciation and awareness of NCPs among tourists and local communities.
	Target 6: By 2030, all areas under land and sea use Will be managed to maintain ecosystem services.	Encourages responsible and sustainable ecotourism practices that minimize environmental impacts. Integrates NCP considerations into ecotourism product development and marketing.

ecotourism sites.		
S3. Promote ecotourism investment, sustainable financing, and digital transformation. S4. Maximize environmental, economic, and socio-cultural benefits to the host communities.	Goal B: Sustainable Use of Biodiversity	Promotes climate-resilient ecotourism practices that adapt to and mitigate climate change impacts. Contributes to the conservation of biodiversity and ecosystems through sustainable ecotourism management.
	Target 7: By 2030, at least 70% of areas with significant biodiversity are under effective and equitable management.	Emphasizes the importance of managing ecotourism sites in a way that protects biodiversity and ecosystem services. Promotes sustainable ecotourism practices that contribute to the conservation of key biodiversity areas.
S5. Promote a culture of ecotourism, and establish partnerships. S6. Strengthen institutional capacity and ecotourism governance.	Goal C: Nature Positive Economy	Attracts investment in sustainable ecotourism projects that contribute to biodiversity conservation and economic development. Promotes innovative financing mechanisms for ecotourism, such as payments for ecosystem services (PES).
	Target 3: By 2030, all private sector financial institutions and investors have assessed and addressed their dependencies and impacts on biodiversity.	Encourages ecotourism investors to adopt sustainable practices and minimize their environmental footprint. Promotes the integration of biodiversity considerations into ecotourism investment decisions.
S7. Monitor outcomes and impacts. S1. Develop and market multidimensional and competitive ecotourism products anchored on Filipino culture and values.	Goal D: Equitable Benefits Sharing	Ensures that local communities benefit directly from ecotourism development through employment, entrepreneurship, and fair benefit sharing. Promotes inclusive ecotourism practices that empower local communities and contribute to poverty alleviation.
	Target 18: By 2030, all stakeholders, including Indigenous peoples and local communities, will be fully involved in the planning, implementation, and monitoring of biodiversity-related policies and actions.	Encourages meaningful participation of local communities in ecotourism planning, development, and management. Promotes equitable distribution of ecotourism benefits among local communities and marginalized groups.
S2. Develop and manage resilient, climate change-responsive infrastructures and mechanisms for ecotourism sites. S3. Promote ecotourism investment, sustainable financing, and	Goal E: Implementation Support	Raises awareness and understanding of ecotourism principles and practices among stakeholders. Fosters collaboration and partnerships among government agencies, the private sector, local communities, and NGOs to promote sustainable ecotourism.
	Target 20: By 2030, all stakeholders have access to the knowledge, tools, financial resources, and capacity to	Strengthens institutional capacity and expertise for ecotourism management and governance.

digital transformation.	implement the GBF.	Promotes knowledge sharing, capacity building, and technical support for ecotourism stakeholders.
S4. Maximize environmental, economic, and socio-cultural benefits to the host communities. S5. Promote a culture of ecotourism, and establish partnerships.	Goal F: Enabling Conditions	Enhances the regulatory and policy framework for sustainable ecotourism development. Strengthens institutional coordination and collaboration among stakeholders involved in ecotourism.
	Target 20: By 2030, all stakeholders have access to the knowledge, tools, financial resources, and capacity to implement the GBF.	Promotes effective monitoring and evaluation of ecotourism initiatives to assess their impacts and inform adaptive management. Ensures that ecotourism development aligns with national and international biodiversity conservation goals and commitments.
S6. Strengthen institutional capacity and ecotourism governance.	Goal F: Enabling Conditions	Enhances the regulatory and policy framework for sustainable ecotourism development. Strengthens institutional coordination and collaboration among stakeholders involved in ecotourism.

3.1. VISION, OBJECTIVES, OUTPUTS, AND ACTIVITIES

Vision. The vision of ecotourism development in the Philippines is to transform the country into a globally competitive ecotourism destination, leveraging its abundant natural beauty and cultural richness. This involves a commitment to conserve, enhance, sustain, and develop these assets while ensuring the equitable sharing of benefits among its people.

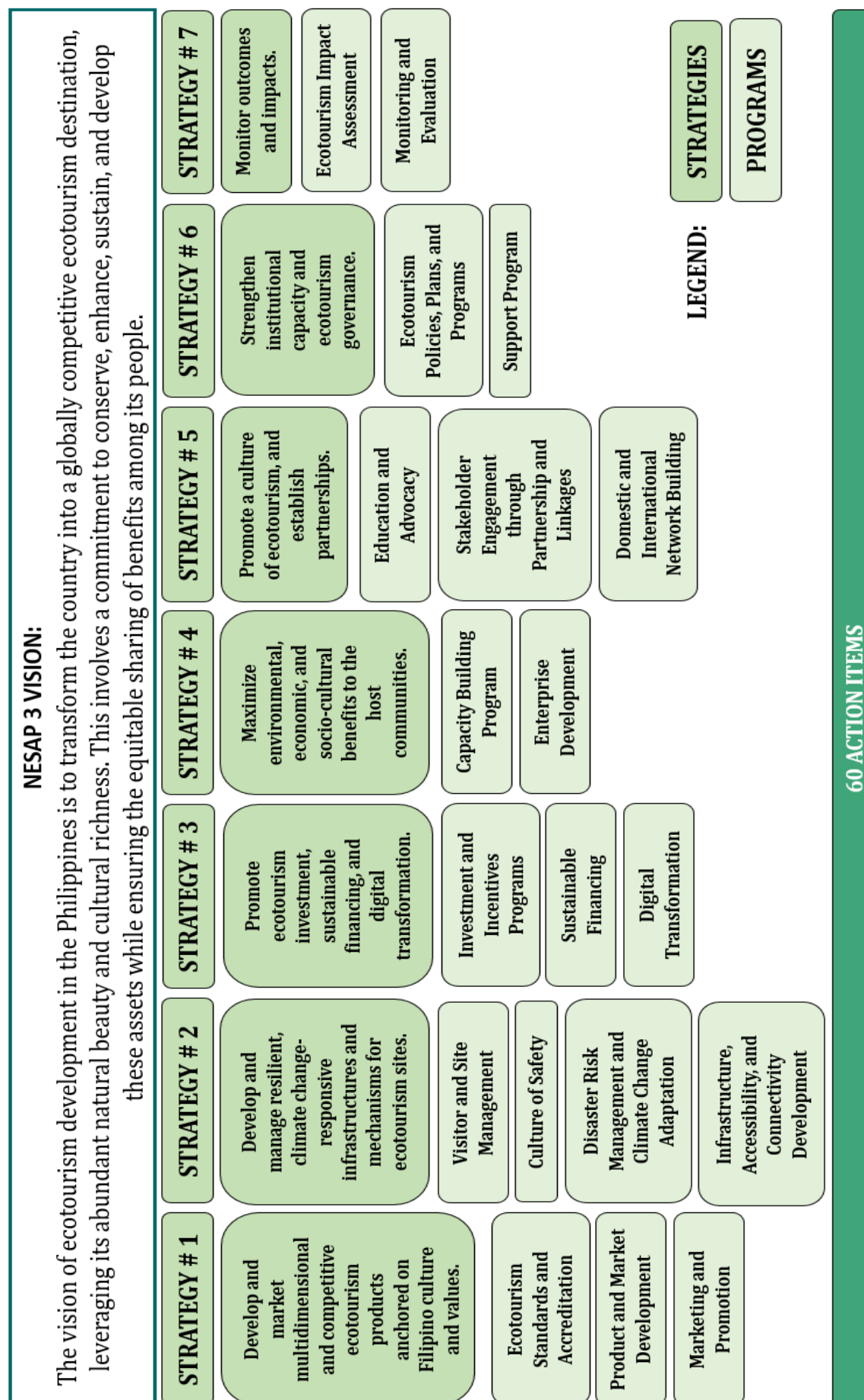
Objectives. Taking into consideration the national policies for development to achieve the country's collective long-term aspiration under the NEDA's Ambisyon Natin 2040, as adopted under the PDP 2023 - 2028, the NTDP 2023-2028 and the DENR's 7-point agenda, the Philippine framework for ecotourism development under the NESAP 2024 -2028 outlines seven (7) strategic objectives, namely:

- Strategy 1. Develop and market multidimensional and competitive ecotourism products anchored on Filipino culture and values.
- Strategy 2. Develop and manage resilient and climate change-responsive infrastructures and mechanisms for ecotourism sites.
- Strategy 3. Promote ecotourism investment, sustainable financing, and digital transformation.
- Strategy 4. Maximize environmental, economic, and socio-cultural benefits to the host communities.
- Strategy 5. Promote a culture of ecotourism and establish partnerships.
- Strategy 6. Strengthen institutional capacity and ecotourism governance.
- Strategy 7. Monitor outcomes and impacts.

Outputs. Outputs of these strategies are clustered into nineteen (19) thematic action programs (see Figure 11) with specific projects, programs, and activities (PPAs) that are designed to answer issues and concerns raised during the assessment.

Activities. To realize the set targets and outputs of the NESAP 2024-2028, specific activities of action items are identified (see Table 10). The plan has outlined sixty (60) actions for implementation. Each of these actions is envisioned to contribute to the attainment of the vision by providing solutions to specific concerns brought out during the situational assessment.

Figure 11. NESAP 2024-2028 STRATEGIC OBJECTIVES



Strategy 1. *Develop and market multidimensional and competitive ecotourism products anchored on Filipino culture and values.*

To achieve the vision of transforming Philippine ecotourism into a globally competitive offering, the development of a diversity of ecotourism products must be given attention coupled with aggressive and cohesive strategic marketing activities. Philippine ecotourism can gain much ground with the proper mix of actions from this strategy.

Under this strategy are three (3) thematic programs with specific proposed projects and activities.

1. **Ecotourism Standards and Accreditation** – will refer to actions that would enhance the implementation of one of the functions of the RECs which is to assess ecotourism projects in their regions. To guide the process, the DOT should relaunch the specific accreditation of ecotourism assets and service providers and provide an information campaign related to it. The DENR should also revisit and advocate ecotourism activities in protected areas, including support services.
2. **Product and Market Development** – As mentioned, the Philippines does not lack resources that can be great ecotourism assets. However, there is a need to create an inventory of such resources that are prime for ecotourism development and match them with what visitors are looking for. Ecotourism should be an integral part of local destinations' tourism circuit whenever possible. Ecotourism should also be true to its definition of integrating cultural values and creating a culture of biodiversity conservation and protection.
3. **Marketing and Promotion** – Part of the development plan should always be the strategic marketing plan that can effectively communicate the product to the target visitors.

Strategy 2. *Develop and manage resilient and climate change-responsive ecotourism infrastructure and mechanisms for ecotourism sites.*

Considering that the Philippines is one of the countries most affected by climate change, the plan must include actions that contribute to the mitigation and adaptation to climate change. Ecotourism sites and the communities that host them must have the capacity to face hazards, both natural and manmade. While the Philippines has great assets that can be part of the ecotourism spectrum, the challenge is creating them into products that world travelers are looking for and supporting them with infrastructure that will make them competitive.

The actions and projects are clustered under four (4) thematic programs.

1. **Visitor and Site Management** – Establishment of a carrying capacity must be an integral part of site management to be able to control the impact of tourism in ecologically sensitive sites. With it is the implementation of waste and water management, providing facilities that allows the site to minimize the impact of human activities in the area.
2. **Culture of Safety** – In the administration of ecotourism sites, incident command and safety protocol should be included.
3. **Disaster Risk Management and Climate Change Adaptation** – Ecotourism site development must mainstream disaster risk reduction management principles. This will include climate-resilient design of facilities and activities.

4. **Infrastructure and Accessibility Development** – Ecotourism, at face value, might seem devoid or needs less physical infrastructure development. However, the truth is that, much like other tourism products, it needs to be connected to service centers, gateways, and town centers. Ecotourism sites would also need specialized designs that blend well with the natural and cultural environment.

Strategy 3. *Promote ecotourism investment, sustainable financing, and digital transformation.*

Recognizing the need to have more diverse investment from the private sector in ecotourism development, it should be the policy of the government to promote ecotourism as a viable investment. Part of the investment consideration is mainstreaming digital innovations for ecotourism sites that will keep visitors interested and their basic needs supplied.

Under this strategy are two (3) thematic programs:

1. **Investment and Incentive Programs** – The government should take advantage of the current Tourism Act of 2009 which gives value to sustainable development. For one, part of the priority projects financed through the Tourism Infrastructure and Enterprise Zone Authority is ecotourism projects. With regards to incentives, Guidelines must be created on how the government can provide it for ecotourism development.
2. **Sustainable Financing** – To sustain ecotourism programs, stakeholders must be able to have access to financing that they can use for ecotourism development and site management.
3. **Digital Transformation** – Investing in ecotourism should include the transformation of ecotourism using innovations in technology

Strategy 4. *Maximize environmental, economic, and socio-economic benefits to the host communities.*

Strengthening stakeholder engagements involves making the same stakeholders understand the benefits of ecotourism programs in their community. They should be able to know how to make use of the protected resources and their cultural heritage in tourism activities. More importantly, they must be an active participant in the management of ecotourism sites.

To educate the host communities are actions clustered into two (2) thematic programs:

1. **Capacity Building Program** – The lead agencies shall conduct various capacity building in ecotourism development, product development, skills upskilling, visitor management, and marketing plans to make sure that the host communities are ready to start or revitalize their ecotourism programs.
2. **Enterprise Development** – It is important that the host communities not only understand how to develop the product but also how to manage and grow the product into economically beneficial activities. Hence, business entrepreneurship should be part and parcel of the capacity-building program.

Strategy 5. *Promote a culture of ecotourism and establish partnerships.*

Stakeholder engagement shall also mean dealing with other sectors not necessarily direct beneficiaries of ecotourism activities, but rather, supporting partners in the development

of ecotourism. Creating a culture of ecotourism would mean a whole society approach, including the international community.

To do this, there are three (3) thematic programs:

1. **Education and advocacy** – To grow the interest in Philippine ecotourism, raising awareness through publications and multimedia promotions should be prioritized. Partnerships with academic and research institutions should be able to expand ways on how to implement ecotourism more effectively. Ecotourism must be seen as a way to mainstream biodiversity conservation and cultural heritage preservation into activities that contribute to the livelihood of communities.
2. **Stakeholder Engagement through partnerships and linkages** – Engagements must be made with sectors that are not traditionally involved in ecotourism nor with tourism in general. More productive engagements other than protected area tenure instruments must be explored to expand these linkages and make the projects more sustainable.
3. **Domestic and International Network Building** – Ecotourism development must not operate in silos anymore as it is easier to reach out to ecotourism networks now due to the emergence of connectivity and cheaper modalities. Networking will make sure that ecotourism development in the Philippines is at par with the rest of the world.

Strategy 6. *Strengthen institutional capacity and ecotourism governance.*

Recognizing that the ecotourism institutional framework can be improved, the Ecotourism Bodies under the EO 111, s.1999 should come up with more innovative policies and programs that answer to the call of the times with regards to ecotourism development.

Two (2) Thematic Programs:

1. **Ecotourism Policies, Plans, and Programs** – There is a need to review the policies governing ecotourism and possibly come up with new ones that will ensure the future of ecotourism. This may include national legislation and integration of ecotourism in local tourism development plans.
2. **Support Programs** – This includes the creation of regulations that would create a sound environment for ecotourism to thrive and prosper. If needed, inter-agency collaborations for ecotourism can be localized down to the barangay level for a more proactive and area-appropriate process.

Strategy 7. *Monitor outcomes and impacts.*

One of the challenges in assessing ecotourism is the scarce data resources, especially for specific programs and sites. There is a need to institutionalize and implement more rigorously the standard monitoring systems of DOT and explore the application of other international frameworks on Philippine ecotourism destinations.

For this strategy, actions are clustered into two (2) thematic programs:

1. **Ecotourism Impact Assessment** – This should be a process that is institutionalized for ecotourism projects especially because of the impact that tourism causes on sensitive environments and communities.
2. **Monitoring and Evaluation** – To come up with better decisions, approved standard statistics systems like the Standard Local Tourism Statistics Systems and the

Ecotourism Statistics Framework should be implemented and rolled out to the sites, along with the application of international monitoring frameworks like the Measurement for Sustainable Tourism and the network of UN Tourism Sustainable Tourism Observatories,

3.2. INDICATIVE TARGETS

The absence of more comprehensive data does not allow the estimation of many indicative targets. Based on the study gathered during the situational analysis stage, arrivals and income can be estimated as indicative targets for 2023–2028 (see Table 11). The estimates include baseline, medium, and upside targets.

The targets presented here are just indicative figures of the overall target of the NESAP 2024-2028. It indicates the desire to improve the value and appreciation for Philippine ecotourism products. It is understood that the arrivals and the income generated might be bigger should the ecotourism sites from all types of management (PA, LGU-managed, and privately managed) be accounted for. Hence, there is a need to improve the monitoring systems for ecotourism sites.

Table 11: Visitor and Gross Income Targets for 2023 - 2028						
	Visitor Arrivals in PA			Gross Income from Ecotourism Activities in PAs (in PHP)		
Year	Baseline	Medium	Upside	Baseline	Medium	Upside
2017	3,110,748			50,701,953.79		
2018	3,969,900			73,856,003.58		
2019	2,387,500			97,309,869.48		
2020	731,518			14,939,225.98		
2021	1,158,664			18,075,603.84		
2022	2,176,659			65,425,821.66		
2023	2,720,824	4,018,113	5,428,588	78,490,027.37	100,496,577.10	113,001,886.32
2024	3,844,100	6,119,327	8,366,997	94,802,819.00	136,196,091.11	145,837,055.76
2025	4,193,563	6,709,142	9,562,283	106,679,369.65	152,124,641.39	162,359,433.57
2026	4,642,874	7,520,137	10,956,782	121,315,471.77	171,336,708.62	191,317,258.53
2027	5,092,184	8,331,132	11,554,425	138,047,435.77	192,539,844.63	223,314,083.22
2028	5,741,188	9,289,581	13,446,960	157,189,640.93	215,070,359.83	264,497,769.15

Notes:

- For the targets, the baseline numbers are data from protected areas (PAs). No data is available for ecotourism sites managed by LGUS and the private sector. There is also no reliable data for employment on ecotourism sites even for PAs.
- The figures for the Years 2017 to 2022 are actual data released by DENR - BMB.
- To come up with the targets for Years 2023-2028, the % growth rate used on the NTDP 2023-2028 for international visitor arrivals and Revenue for baseline, medium, and Upside scenarios were applied.



Institutional and Action Plan

The successful implementation of the NESAP 2024–2028 hinges on a well-coordinated inter-agency approach that aligns efforts and strategies to achieve the overarching goal of ecotourism development. This requires a thorough consideration of various factors, including environmental conservation, community engagement, sustainable practices, and adherence to government regulations.

To ensure a unified approach, NESAP 2024–2028 employs a logical framework, clearly identifying lead and strategic partners for each program, project, and activity. This is followed by a detailed action plan with specific commitments from each partner, fostering a collaborative and harmonized effort towards achieving the national ecotourism development objectives.

NESAP 2024–2028 ACTION PLAN MATRIX

The development framework serves as a strategic guide for the action plan matrix, directly addressing the issues and concerns identified in the earlier Situational Analysis. The constraints and opportunities pinpointed in that analysis are complemented by targeted Programs, Projects, and Activities (PPAs) aimed at achieving the outlined strategic objectives. This detailed approach provides a clear roadmap for the successful implementation of ecotourism development initiatives.

The action plan matrix (see Table 12) provides a comprehensive overview of the constraints and opportunities that shape ecotourism development in the country. It outlines proposed actions designed to address these constraints and capitalize on opportunities to achieve the goals outlined in the NESAP.

The document annexed to the NESAP indicates the proposed implementation and indicative budgetary requirements.

Table 12: Action Plan Matrix

ISSUES AND CONSTRAINT	STRATEGIC OBJECTIVES AND PROGRAMS		PROPOSED PROGRAM OF ACTIONS		COMMITMENT SETTING		OBJECTIVELY VERIFIABLE INDICATOR (OVI)	
					LEAD / RESPONSIBLE AGENCY	STRATEGIC PARTNERS		
	Develop and market multidimensional and competitive ecotourism products anchored on Filipino culture and values.							
Limited categorization of ecotourism sites and limited classification framework for accreditation of ecotourism projects	S1	1.1	Ecotourism Standards and Accreditation	a	Formulate guidelines for standards and accreditation on ecotourism products and services	DOT	DENR, REC	Accreditation System for Ecotourism Products and Service Providers
Limited ecotourism promotion; limited product development; unsustainable tourism practices; lack of infrastructure; problem with accessibility and connectivity		1.2	Product and Market Development	a	Integrate existing ecotourism sites in the DOT Philippine Experience Program	DOT	REC	Information Sheets of DOT Philippine Experience Program
				b	Expansion of permitted ecotourism activities in protected areas	DENR	REC, DILG	Increased Number of Ecotourism Activities
				c	Data Upkeep and Mapping of Ecotourism Sites (existing, emerging, and potential)	DOT	REC, DILG	Database and Map of Ecotourism Sites
				d	Development of Ecotourism Circuits	DOT	REC	List and Data on Ecotourism Circuits
				e	Integration of Cultural Heritages in Ecotourism Activities	DOT	REC, NCCA, NCIP, NHCP, DILG, NM	Ecotourism Site and Activity Database
				f	Identify priority ecotourism destinations and products for promotion and development	DOT	REC, ETWG, NESC	Prioritization Plan for Ecotourism Site and Market Development
				g	Conduct market strategy for ecotourism to identify target domestic and international market and ecotourism specialist tour ops and buyers	DOT	REC,TPB, ETWG	Philippine Ecotourism Strategic Marketing Plan
				h	Undertake benchmarking of ecotourism with competitors.	DOT	ETWG, REC	Ecotourism Benchmarking Report and Recommended Actions
				i	Undertake product - market matching to match existing ecotourism products with specific target markets.	DOT	REC,TPB, ETWG	Philippine Ecotourism Strategic Marketing Plan
				j	Development of New Model Ecotourism Sites in Different Regions	DOT	TIEZA, TPB, DENR, DILG, REC	Memorandum of Agreement amongst Developers and Implementers
				k	Mainstreaming cultural, community, and gender sensitive designs in ecotourism facilities	REC	DOT, DENR, DILG, NCCA, NCIP, NHCP, NM	Information Sheets on Ecotourism Facilities
				l	Mainstreaming of green-building design in ecotourism sites	REC	DOT, TIEZA, DENR, DOST	Information Sheets on Ecotourism Facilities
Limited ecotourism promotion		1.3	Marketing and Promotion	a	Development of an online ecotourism information page	DOT	DENR, TPB, REC	Website Launching
				b	Support/undertake joint promotion activity for ecotourism	DOT	TPB, ETWG, REC	Project Proposal and Report on join Promotional Activities
				c	Development of a Philippine Ecotourism Strategic Marketing Plan	DOT	TPB, DENR, REC	Philippine Ecotourism Strategic Marketing Plan
				d	Publication and Release of Promotional Materials in multimedia platform	DOT	TPB, REC, LGUs	Ecotourism Promotional Materials
				e	Launch of Ecotourism and Biodiversity Month	DOT	DENR, NESC, ETWG, REC	NEDC Resolution Declaring Ecotourism Month, Activity Plan for Ecotourism Month
				f	Explore hosting of international ecotourism events and conferences	DOT	TPB, ETWG	Project Proposal for Ecotourism Events and Conferences
				g	Participate in ecotourism fairs and events	DOT	NESC, REC	Participation Reports
	h			Partnership with Social media Influencers and other Known personalities	TPB	DOT, DENR, REC	Contracts and Project Plans with Personalities	

ISSUES AND CONSTRAINT	STRATEGIC OBJECTIVES AND PROGRAMS		PROPOSED PROGRAM OF ACTIONS		COMMITMENT SETTING		OBJECTIVELY VERIFIABLE INDICATOR (OVI)	
					LEAD / RESPONSIBLE AGENCY	STRATEGIC PARTNERS		
	S2	Develop and manage resilient, climate change-responsive infrastructures and mechanisms for ecotourism sites.						
Problem on visitor and site management		2.1	Visitor and Site Management	a	Implementation of Carrying Capacity in Ecotourism Sites	REC	DENR, DOT, DILG, LGUs	Local Regulations on Ecotourism Site carrying Capacity
				b	Conduct of Capacity Building Program on Visitor and Site Management	DOT	DENR, DILG	Report on Capacity Building Program
Climate Change Impacts; Unsustainable tourism practices		2.2	Culture of Safety	a	Development of Site-Specific Incident Command and Safety Protocols	REC	LGUs, DILG, DENR, DOT,	Document on Site-Specific Incident Command and Safety Protocols
				b	Development of site-specific sustainable ecotourism development standards	REC	LGUs, DILG, DENR, DOT,	Document on Site-Specific Sustainable ecotourism development standards
				c	Mainstreaming of health protocols and publication of safety bulletins in sites.	REC	LGUs, DILG, DENR, DOT,	Document of Site-specific health protocols
Climate Change Impacts		2.3	Disaster Risk Management and Climate Change Adaptation	a	Implementation of climate change proofing designs and development	REC	LGUs, DILG, DENR, DOT, TIEZA	Document on climate change proof ecotourism facility design
				b	Mainstreaming of Disaster Risk Reduction Management on site management	REC	LGUs, DILG, DENR, DOT, TIEZA	Document on DRRM in site operations
Inadequate infrastructure; Accessibility and connectivity problem		2.4	Infrastructure, Accessibility, and Connectivity Development	a	Prioritization of ecotourism site-related infrastructure and facilities	TIEZA	DOT, DPWH, DENR, REC	List of Priority Ecotourism Sites for Infrastructure Development Projects
				b	Prioritization of funding and technical support to soft infrastructure and product development	DOT	TIEZA, NEDC, NESC	Report on Prioritized Funding for Ecotourism Development
				c	Construction and Development of ecotourism centers on model sites	TIEZA	DOT, DENR, REC	Memorandum of Agreement amongst Developers and Implementers
				d	Prioritization of Ecotourism Sites on the WITS Program of DOT and DICT	DICT	DOT, DENR, REC	List of Priority Ecotourism Sites for WITS
		S3	Promote ecotourism investment, sustainable financing, and digital transformation.					
Limited Funding; problem with accessibility and connectivity; limited product and market development			3.1	Investment and Incentive Programs	a	Formulation of Ecotourism Investment and Incentive Guidelines including Public-Private Partnership modalities	DOT	PPPC, DENR, DILG, TIEZA
	b				Conduct of Ecotourism Investment Forum	DOT	ETWG, TPB, PPPC	Terminal report on the Conduct of Ecotourism Investment Forum
	c				Increase ecotourism projects under the Tourism Enterprise Zone Program	TIEZA	DOT, DENR	Number of ecotourism projects in TEZs
	d				Exploration of ecotourism opportunity funding from BIMP EAGA	DOT	MTIT, REC	Site Inspection and Meeting Reports
	e				Creation of Awards and Incentives for Ecotourism	ETWG	DOT, DENR, NEDC, REC	Document detailing the Awards System
	3.2		Sustainable Financing	a	Prioritization of TIEZA Funding on Ecotourism and development of guidelines hereof	ETWG	NEDC, TIEZA, DOT, DENR	NEDC Resolution on TIEZA partnership on ecotourism project funding
				b	Access funding from Energy Regulations 1-94 Program under the Department of Energy	ETWG	DOE, DOT, DENR	Guidelines on the Use of ER 1-94 Program on Ecotourism
				c	Explore access to the RISE UP Turismo Loan Orientation for MSMEs in Tourism	DTI	REC, ETWG, DOT	Reports on the Conduct of the Orientation
				d	Explore access to the Integrated Protected Area Fund Retention	DENR	ETWG, NESC, DOT	Guidelines on the use of IPAF on Ecotourism
	3.3		Digital Transformation	a	Explore technological innovations on ecotourism enterprise development and operations	DOT	DTI, DOST, REC, DICT	Pilot Implementation of technological innovations
				b	Partner with responsible agencies with regard to implementing capacity building on digital finance, marketing, and services.	DOT	DTI, DOST, ETWG, DICT	Manual on Digital Innovations for Ecotourism Sites

ISSUES AND CONSTRAINT	STRATEGIC OBJECTIVES AND PROGRAMS		PROPOSED PROGRAM OF ACTIONS			COMMITMENT SETTING		OBJECTIVELY VERIFIABLE INDICATOR (OVI)
						LEAD / RESPONSIBLE AGENCY	STRATEGIC PARTNERS	
		Maximize environmental, economic, and socio-cultural benefits to the host communities						
Conflicting Interests; Limited Awareness and Education; Limited human resource development; Unsustainable tourism practices; Limited capacity building; and Limited product development.	S4	4.1	Capacity Building Program	a	Organize community-based organizations in ecotourism sites	REC	DOT, DENR, DILG, LGU	List of CBO in ecotourism sites
				b	Institute ecotourism awareness programs	DOT	DENR, REC, LGU	Program Reports
				c	Conduct Capacity Building Training for Management and Front liners of ecotourism sites, including BDFEs, service transports, and guides	DOT	REC, DENR, LGUs	Training Reports
		4.2	Start-ups and Enterprise Development	a	Establish biodiversity-friendly enterprises whose primary services are ecotourism	REC	DOT, DENR	List of BDFE with Ecotourism Services and Products
				b	Information Campaign on Ecotourism Enterprise Development and Accreditation	DOT	REC, DENR, LGUs	Information Campaign Materials
				c	Conduct of orientation on Ecotourism Enterprise Operations	DOT	REC, DENR, LGUs	Training Reports
				d	Registration of ecotourism activities and services as legitimate local business operations	LGUs	RECs	List of Business-Licensed Ecotourism operators and service providers
		Promote a culture of ecotourism, and establish partnerships.						
Climate Change Impacts; Inability to categorize ecotourism sites and lack of classification framework to accredit ecotourism projects; Limited Awareness and Education; Limited capacity building; Limited human resource development; Limited product development; Unsustainable tourism practices; and Weak enforcement of environmental laws.	S5	5.1	Education and Advocacy	a	Promote research on ecotourism	DOT	Academe, DENR	Research documents
				b	Revitalize mainstreaming of ecotourism and biodiversity principles in community schools inside protected areas	DepEd	DENR, DOT, REC, DILG, LGUs	School Curriculum with mainstreamed ecotourism and biodiversity principles, with activities on actual field visits
				c	Fund ecotourism research	DOT	DENR, DTI, DOLE, NEDA, TPB	Memorandum of Agreement on Research grants
				d	Organize ecotourism conferences in partnership with educational institutions	DOT	Academe, DENR	List of ecotourism conferences conducted and partnerships with institutions
				e	Integration of Communication, Education, and Public Awareness on Environmental Conservation and Protection in tour guiding and other activities	REC	DENR, DOT	Guidelines on CEPA Integration
Conflicting Interests; Limited public sector engagement on ecotourism standards and policy formulation; weak participation of stakeholders;	5.2	Stakeholder Engagement through Partnership and Linkages	a	Link ecotourism enterprise development with Peace Village Development Projects in threatened areas	REC	DOT, DENR, DND	Memorandum of Agreement in local areas regarding ecotourism development	
			b	Orientation on Ecotourism Enterprise Development and Stakeholder Engagement	REC	DOT, DENR, LGU	Orientation Reports	
			c	Partnership with Local Businesses on Ecotourism Enterprises	REC	DOT, DENR, LGU	Memorandum of Agreement in local areas regarding ecotourism development	
Limited ecotourism promotion; and weak participation of stakeholders	5.3	Domestic and International Network Building	a	Partnership with International ecotourism, biodiversity, and climate change networks including regional organizations	DOT	ETWG, DENR	Reports on the Conduct of fora, conferences, and similar activities	
			b	Partnership with local ecotourism NGOs and CSOs	DOT	ETWG, DENR, REC	Reports on the Conduct of fora, conferences, and similar activities	

ISSUES AND CONSTRAINT	STRATEGIC OBJECTIVES AND PROGRAMS		PROPOSED PROGRAM OF ACTIONS		COMMITMENT SETTING		OBJECTIVELY VERIFIABLE INDICATOR (OVI)	
					LEAD/ RESPONSIBLE AGENCY	STRATEGIC PARTNERS		
		Strengthen institutional capacity and ecotourism governance.						
Limited public sector engagement on ecotourism standards and policy formulation; Overlapping institutional functions	S6	6.1	Ecotourism Policies, Plans, and Programs	a	Approval of Sustainable Tourism Development Council	DOT	NEDC	Approved Executive Order
				b	Review and Updating of Ecotourism EO111 Bodies	ETWG	DOT, DENR, NEDA	Review and Recommendation Report
				c	Review and Amend RA 9593 to include ecotourism specific regulations	DOT	Congress, NEDC	Review and Recommendation Report
				d	Review and update role of RECs in the approval of ecotourism projects	ETWG	REC	Review and Recommendation Report
				e	Formulation of Guidelines on the Development and Management of Ecotourism Sites	ETWG	DOT, DENR, REC	Guideline Document
				f	Mainstreaming of ecotourism development in local tourism development plans	DOT	LGUs, DILG	Guideline Document on the inclusion of ecotourism in LTDP
Limited public sector engagement on ecotourism standards and policy formulation; Overlapping institutional functions	S6	6.2	Support Programs	a	Formulation of Local Resolutions Advocating ecotourism development	LGUs	REC	Local Resolutions and Ordinances
				b	Creation of technical working groups on ecotourism in LGUs managing ecotourism sites	LGUs	REC	Local Resolutions Creating the TWG
		Monitor outcomes and impacts.						
Overlapping institutional functions; Weak enforcement of environmental laws; Limited Awareness and Education; limited product and market development	S7	7.1	Ecotourism Impact Assessment	a	Mainstreaming the use of a standard ecotourism impact assessment tool	DOT	DENR, REC	Standard EIA Tool
		7.2	Monitoring and Evaluation	a	Institutionalizing the DOT SLTSS and the Ecotourism Statistical Framework	DOT	NESC, ETWG, REC, DILG	Reports culled from the DOT SLTSS and ESF
				b	Advocate the declaration of ecotourism destinations as member of the UN Tourism International Network of Sustainable Tourism Observatories.	DOT	UP, REC	Declaration of UN Tourism INSTO areas

