

ASEAN Overseas Travel Awareness Survey Report <The Philippines >

March 2021



Survey conducted by:

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[Survey Overview]

Method	<ul style="list-style-type: none"> • Internet survey • Screening survey (preliminary survey) was first conducted by the Internet survey firm (Micromill, Inc.) utilizing survey monitor panel the firm maintains and actual survey conducted to qualified respondents.
Survey Period	<ul style="list-style-type: none"> • Friday, January 22 and Saturday, January 23, 2021
Sample Qualification	<ul style="list-style-type: none"> • Male/female 20 years old or older. Travels abroad at least once every 3 years and intends to travel abroad in the future. <p>*For each country, ensure to include at least 30 samples with experience of visiting the country.</p>



- Of the 10,000 males/females aged 20 and over who took part in this nationwide survey (including people with no intention of overseas travel), **8.0 % had visited the Philippines**. 5.1% said their purpose was for sightseeing, and 1.9% said their purpose was for business.
 - A higher percentage of males had visited compared to females (male: 10.0%, female: 5.9%). Amongst this, males **in their 20s had the highest percentage (14.6%,)** and the purpose of visits varying widely, such as sightseeing, business trips, visiting friends & acquaintances, and long-term stays.

[Questions for people who have visited the Philippines]

- **52.9% of respondents had visited the Philippines once**, and 19.8 had visited twice. Over 20% of males in their 50s and 60s had been to the Philippines five times or more.
- For over half of respondents in their **20s and 30s, the most recent timing of visits to the Philippines was 2018 or later while 60% of people in their 40s had visited in 2016 or earlier**.
- The highest purpose of visiting the Philippines was **“Sightseeing/leisure” (66.9%), with the second highest purpose being “Business trips” (14.3%)**
- Regarding deciding factor in choosing the Philippines as a destination, **29.0% of respondents answered “Recommended by family/friends/acquaintances,” and 23.9% answered “The trip was low cost.”**
 - The highest percentage of people in their 20s (30.6%) responded “The trip was low cost,” and 43.5% of respondents in their 30s chose “Recommended by family/friends/acquaintances.”
- In terms of points of satisfaction upon visiting the Philippines, **“Cost” (34.1%)** ranked highest, followed by “Natural scenery” (29.0%), and “Scenery and atmosphere” (28.7%).
- As for points of dissatisfaction, the highest percentage of respondents **(32.1%)** answered they were dissatisfied with the aspect of **“Good public security”**. This was the response given by 41.2% of the 60 and over age group and 36.7% of people in their 20s. This response rate was high for both those aged 60 and over who visited the Philippines in 2016 or earlier, and those in their 20s, who visited the Philippines in 2018 or later. **This suggests the importance of improving concern regarding “Public security.”**
 - Although the level of satisfaction was high for “Food ingredients & cuisine” the “Not satisfied” response rate for this item was also high, therefore personal preference is believed to be a factor. Moreover, there is **room for improvement regarding the aspect of “Souvenirs & local products.”**



[Questions for all respondents with intention to travel overseas]

- Regarding impression of the Philippines , the responses were “Charming beach resorts” (23.7%), “Beautiful nature and scenery” (19.8%), and “Lively” (13.5%). Overall, **impressions of the Philippines as offering nature and resort aspects ranked high.**
- Regarding intention to travel to the Philippines for sightseeing, **48.7% of respondents answered “I want to go.” A high percentage of those who had visited wanted to go again (63.2%).** Also, a higher percentage of males expressed intention to go to the Philippines than females.
- As for what they’d like to do in the Philippines , **45.7% answered “Enjoy nature and scenery”, and 40.7% answered “Rest and rejuvenate.”** A higher percentage of males/females in their 20s answered “Enjoy the outdoors and sports.”
- As for the reason why people had no intention to travel to the Philippines for sightseeing, **an overwhelming percentage of people (58.1%) answered “The level of public security concerns me,”** and there was no apparent gap between people who’d visited the Philippines already and those who had not.
- Of the Philippines ’s major five tourism resources, the highest percentage of respondents answered **“I’ve heard of it and I know what kind of place it is” for Cebu (55.3%)** . Excluding Cebu, males had higher awareness of all the other sightseeing resources, **particularly males in their 20s had high awareness of Palawan Island and Bohol.**



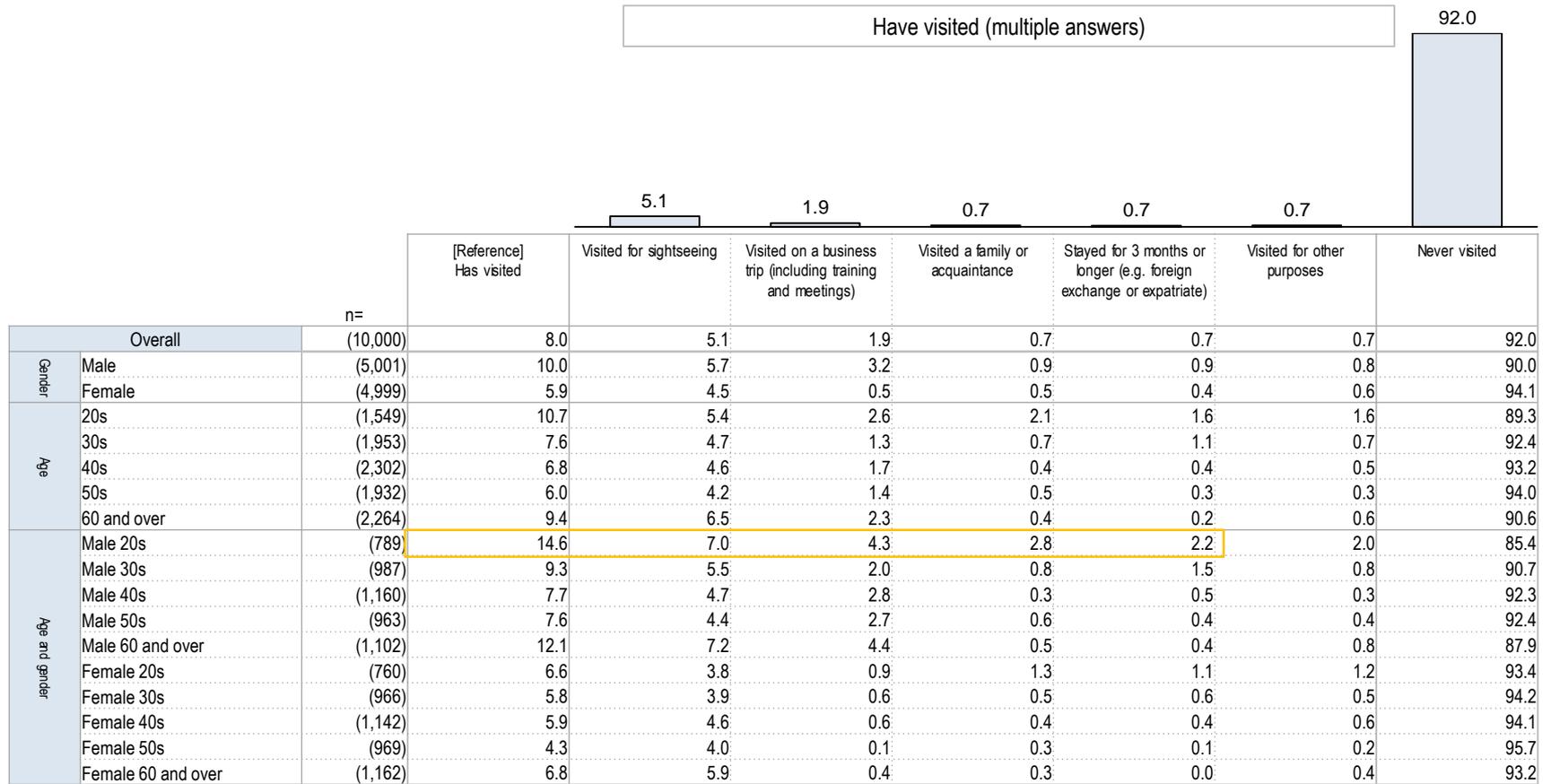
Survey Results [Screening survey]

1. Visit experience (details)

- Of the 10,000 males/females aged 20 and over who took part in this nationwide survey (including people with no intention of overseas travel), 8.0 % had visited the Philippines . 5.1% said their purpose was for sightseeing, and 1.9% said their purpose was for business.
- A higher percentage of males had visited compared to females (male: 10.0%, female: 5.9%). Amongst this, males in their 20s had the highest percentage at 14.6%, and the purpose of visits varying widely, such as sightseeing, business trips, visiting friends & acquaintances, and long-term stays.

People who have visited the Philippines (Screening survey)

Q. Have you ever visited the below country or region? Please give all applicable answers for each country/region. **[the Philippines]**





Survey Results

2. [People who have visited] Number/timing of visits

- 52.9% of respondents had visited the Philippines once, and 19.8 had visited twice. Over 20% of males in their 50s and 60s had been to the Philippines 5 times or more.
- Approx. half of all respondents (47.8%) visited 2016 or earlier. For over half of respondents in their 20s and 30s, the most recent timing of visits to the Philippines was 2018 or later, while 60% of people in their 40s had visited in 2016 or earlier.

[People who have visited] Number of visits

Q. How many times have you visited each country? Please only give one applicable answer for each country.
*Regardless of purpose – e.g. sightseeing, business, etc. [the Philippines]

Once Twice 3 times 4 times 5 times or more

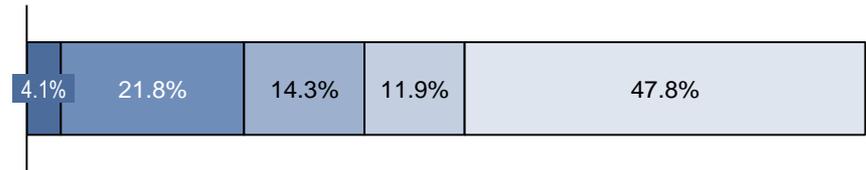


		n=	Once	Twice	3 times	4 times	5 times or more
Overall		(293)	52.9	19.8	12.6	3.1	11.6
Gender	Male	(201)	47.3	21.9	14.4	3.0	13.4
	Female	(92)	65.2	15.2	8.7	3.3	7.6
Age	20s	(49)	53.1	30.6	10.2	2.0	4.1
	30s	(62)	48.4	29.0	12.9	3.2	6.5
	40s	(47)	63.8	17.0	10.6	4.3	4.3
	50s	(67)	53.7	13.4	13.4	1.5	17.9
	60 and over	(68)	48.5	11.8	14.7	4.4	20.6
	Age and gender	Male 20s	(32)	37.5	43.8	15.6	3.1
Male 30s		(41)	51.2	31.7	9.8	0.0	7.3
Male 40s		(32)	62.5	18.8	12.5	6.3	0.0
Male 50s		(46)	47.8	13.0	13.0	2.2	23.9
Male 60 and over		(50)	40.0	10.0	20.0	4.0	26.0
Female 20s		(17)	82.4	5.9	0.0	0.0	11.8
Female 30s		(21)	42.9	23.8	19.0	9.5	4.8
Female 40s		(15)	66.7	13.3	6.7	0.0	13.3
Female 50s		(21)	66.7	14.3	14.3	0.0	4.8
Female 60 and over		(18)	72.2	16.7	0.0	5.6	5.6

[People who have visited] Timing of visit

Q. When did you take the trip? Please only give one applicable answer for each country.
*If you have visited a country more than once, please tell us the purpose of your most recent trip. [the Philippines]

2020 or later Around 2019 Around 2018 Around 2017 2016 or earlier



		n=	2020 or later	Around 2019	Around 2018	Around 2017	2016 or earlier
Overall		(293)	4.1	21.8	14.3	11.9	47.8
Gender	Male	(201)	3.5	24.4	15.4	13.4	43.3
	Female	(92)	5.4	16.3	12.0	8.7	57.6
Age	20s	(49)	10.2	30.6	22.4	14.3	22.4
	30s	(62)	6.5	27.4	22.6	12.9	30.6
	40s	(47)	2.1	14.9	6.4	10.6	66.0
	50s	(67)	1.5	17.9	9.0	13.4	58.2
	60 and over	(68)	1.5	19.1	11.8	8.8	58.8
	Age and gender	Male 20s	(32)	9.4	31.3	28.1	18.8
Male 30s		(41)	4.9	26.8	19.5	14.6	34.1
Male 40s		(32)	0.0	18.8	9.4	12.5	59.4
Male 50s		(46)	2.2	26.1	8.7	10.9	52.2
Male 60 and over		(50)	2.0	20.0	14.0	12.0	52.0
Female 20s		(17)	11.8	29.4	11.8	5.9	41.2
Female 30s		(21)	9.5	28.6	28.6	9.5	23.8
Female 40s		(15)	6.7	6.7	0.0	6.7	80.0
Female 50s		(21)	0.0	0.0	9.5	19.0	71.4
Female 60 and over		(18)	0.0	16.7	5.6	0.0	77.8



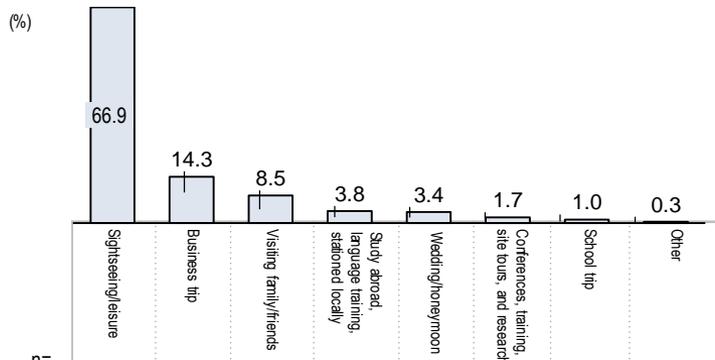
Survey Results

3. [People who have visited] Purpose/companion

- The highest purpose of visiting the Philippines was “Sightseeing/leisure” (66.9%), with the second highest purpose being “Business trips” (14.3%), followed by “Visiting family/friends” (8.5%). The percentage of respondents in their 30s who stated their purpose as “Visit family/friends,” “Study abroad, language training, stationed locally,” and “Wedding/honeymoon” was higher compared to the overall group.
- In terms of travel companion, the highest was “Friends and acquaintances” (31.1%), then “Spouse/partner” (28.3%), followed by “Company colleagues and stakeholders” (18.4%).

[People who have visited] Purpose of visit

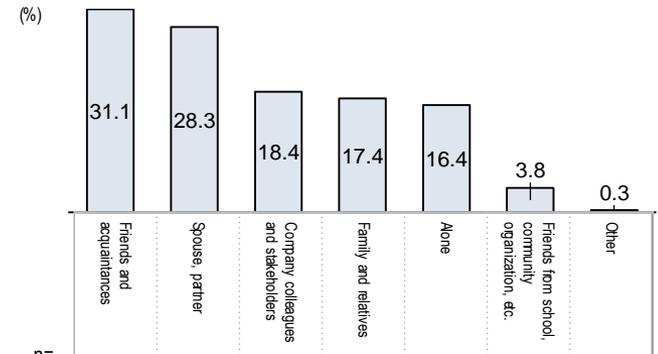
Q. What was the main purpose of the trip? Please only give one applicable answer as the purpose of visiting each country. *If you have visited a country more than once, please tell us the purpose of your most recent trip. [The Philippines]



Gende r	Age	Age and gender	n=	Purpose of visit (%)							
				Sightseeing/leisure	Business trip	Visiting family/friends	Study abroad, language training, stationed locally	Wedding/honeymoon	Conferences, training, site tours, and research	School trip	Other
Overall			(293)	66.9	14.3	8.5	3.8	3.4	1.7	1.0	0.3
Male			(201)	62.2	18.9	9.5	2.5	4.0	1.5	1.0	0.5
Female			(92)	77.2	4.3	6.5	6.5	2.2	2.2	1.1	0.0
20s			(49)	65.3	12.2	10.2	4.1	6.1	0.0	2.0	0.0
30s			(62)	56.5	8.1	16.1	6.5	9.7	1.6	1.6	0.0
40s			(47)	70.2	17.0	4.3	6.4	0.0	0.0	2.1	0.0
50s			(67)	68.7	14.9	9.0	1.5	0.0	4.5	0.0	1.5
60 and over			(68)	73.5	19.1	2.9	1.5	1.5	1.5	0.0	0.0
Male 20s			(32)	59.4	15.6	12.5	3.1	6.3	0.0	3.1	0.0
Male 30s			(41)	56.1	9.8	14.6	4.9	12.2	0.0	2.4	0.0
Male 40s			(32)	65.6	25.0	6.3	3.1	0.0	0.0	0.0	0.0
Male 50s			(46)	63.0	19.6	10.9	0.0	0.0	4.3	0.0	2.2
Male 60 and over			(50)	66.0	24.0	4.0	2.0	2.0	2.0	0.0	0.0
Female 20s			(17)	76.5	5.9	5.9	5.9	5.9	0.0	0.0	0.0
Female 30s			(21)	57.1	4.8	19.0	9.5	4.8	4.8	0.0	0.0
Female 40s			(15)	80.0	0.0	0.0	13.3	0.0	0.0	6.7	0.0
Female 50s			(21)	81.0	4.8	4.8	4.8	0.0	4.8	0.0	0.0
Female 60 and over			(18)	94.4	5.6	0.0	0.0	0.0	0.0	0.0	0.0

[People who have visited] Travel companion

Q. Who accompanied you on the trip? Please give all the answers that are applicable for each country. *If you have visited a country more than once, please tell us about your companion on your most recent trip. [The Philippines]



Gende r	Age	Age and gender	n=	Travel companion (%)							
				Friends and acquaintances	Spouse/partner	Company colleagues and stakeholders	Family and relatives	Alone	Friends from school, community organization, etc.	Other	
Overall			(293)	31.1	28.3	18.4	17.4	16.4	3.8	0.3	
Male			(201)	29.9	28.9	19.9	15.4	19.9	4.0	0.5	
Female			(92)	33.7	27.2	15.2	21.7	8.7	3.3	0.0	
20s			(49)	42.9	20.4	12.2	16.3	12.2	6.1	0.0	
30s			(62)	38.7	24.2	17.7	19.4	9.7	9.7	0.0	
40s			(47)	17.0	31.9	17.0	19.1	25.5	0.0	0.0	
50s			(67)	26.9	34.3	22.4	17.9	14.9	1.5	1.5	
60 and over			(68)	29.4	29.4	20.6	14.7	20.6	1.5	0.0	
Male 20s			(32)	43.8	25.0	9.4	15.6	15.6	6.3	0.0	
Male 30s			(41)	34.1	22.0	17.1	24.4	12.2	12.2	0.0	
Male 40s			(32)	18.8	31.3	18.8	21.9	25.0	0.0	0.0	
Male 50s			(46)	21.7	37.0	23.9	13.0	19.6	0.0	2.2	
Male 60 and over			(50)	32.0	28.0	26.0	6.0	26.0	2.0	0.0	
Female 20s			(17)	41.2	11.8	17.6	17.6	5.9	5.9	0.0	
Female 30s			(21)	47.6	28.6	19.0	9.5	4.8	4.8	0.0	
Female 40s			(15)	13.3	33.3	13.3	13.3	26.7	0.0	0.0	
Female 50s			(21)	38.1	28.6	19.0	28.6	4.8	4.8	0.0	
Female 60 and over			(18)	22.2	33.3	5.6	38.9	5.6	0.0	0.0	



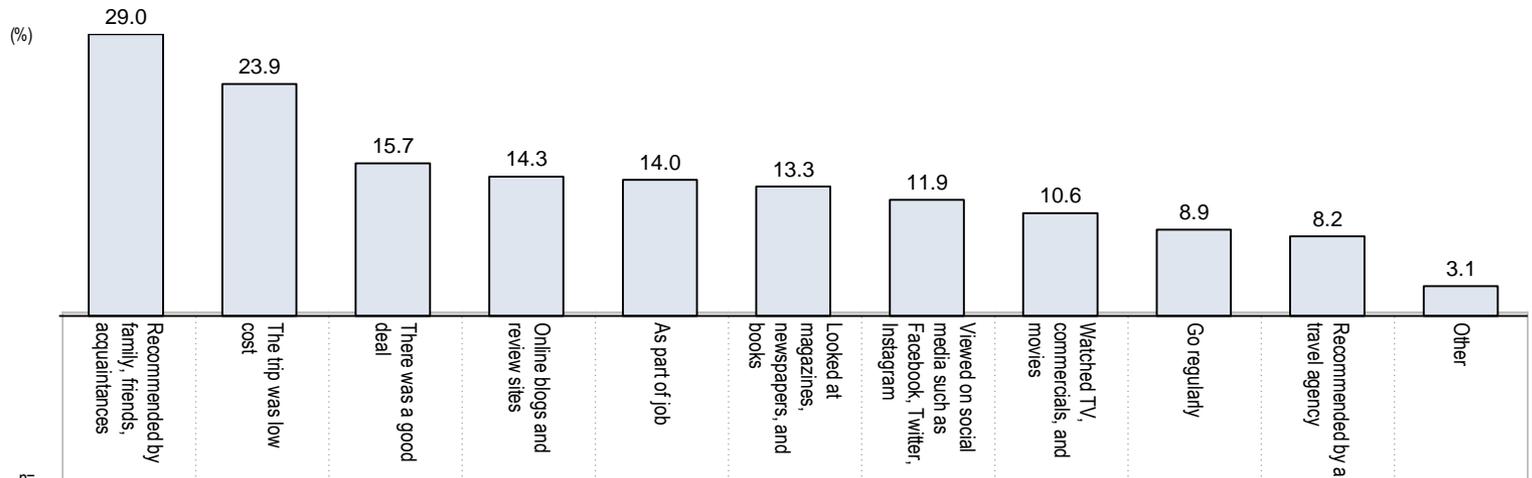
Survey Results

4. [People who have visited] Deciding factor in choosing travel destination

- Regarding deciding factor in choosing the Philippines as a destination, 29.0% of respondents answered “Recommended by family/friends/acquaintances,” and 23.9% answered “The trip was low cost.” 15.7% of respondents stated “There was a good deal.”
- The highest percentage of people in their 20s (30.6%) responded “The trip was low cost,” and 43.5% of respondents in their 30s chose “Recommended by family/friends/acquaintances” which was higher than the overall group.

[People who have visited] Deciding factor in choosing travel destination

Q. What was the deciding factor in choosing your travel destination? Please give all the answers that are applicable. *If you have visited a country more than once, please tell us about your most recent trip. [The Philippines]



		n=	29.0	23.9	15.7	14.3	14.0	13.3	11.9	10.6	8.9	8.2	3.1
Overall		(293)	29.0	23.9	15.7	14.3	14.0	13.3	11.9	10.6	8.9	8.2	3.1
Gender	Male	(201)	27.4	21.4	13.4	15.9	17.9	13.9	12.4	11.4	10.0	8.0	2.0
	Female	(92)	32.6	29.3	20.7	10.9	5.4	12.0	10.9	8.7	6.5	8.7	5.4
Age	20s	(49)	24.5	30.6	10.2	16.3	10.2	14.3	18.4	6.1	4.1	4.1	2.0
	30s	(62)	43.5	25.8	16.1	17.7	4.8	8.1	22.6	12.9	12.9	8.1	3.2
	40s	(47)	29.8	23.4	25.5	19.1	14.9	12.8	4.3	6.4	6.4	12.8	6.4
	50s	(67)	22.4	25.4	17.9	13.4	19.4	13.4	11.9	13.4	11.9	6.0	1.5
	60 and over	(68)	25.0	16.2	10.3	7.4	19.1	17.6	2.9	11.8	7.4	10.3	2.9
	Age and gender	Male 20s	(32)	15.6	34.4	12.5	21.9	9.4	21.9	18.8	6.3	6.3	6.3
	Male 30s	(41)	43.9	22.0	14.6	22.0	4.9	12.2	29.3	17.1	12.2	12.2	0.0
	Male 40s	(32)	28.1	25.0	25.0	21.9	18.8	9.4	3.1	6.3	3.1	15.6	3.1
	Male 50s	(46)	17.4	19.6	15.2	13.0	26.1	10.9	8.7	15.2	15.2	0.0	2.2
	Male 60 and over	(50)	30.0	12.0	4.0	6.0	26.0	16.0	4.0	10.0	10.0	8.0	4.0
	Female 20s	(17)	41.2	23.5	5.9	5.9	11.8	0.0	17.6	5.9	0.0	0.0	5.9
	Female 30s	(21)	42.9	33.3	19.0	9.5	4.8	0.0	9.5	4.8	14.3	0.0	9.5
	Female 40s	(15)	33.3	20.0	26.7	13.3	6.7	20.0	6.7	6.7	13.3	6.7	13.3
	Female 50s	(21)	33.3	38.1	23.8	14.3	4.8	19.0	19.0	9.5	4.8	19.0	0.0
	Female 60 and over	(18)	11.1	27.8	27.8	11.1	0.0	22.2	0.0	16.7	0.0	16.7	0.0



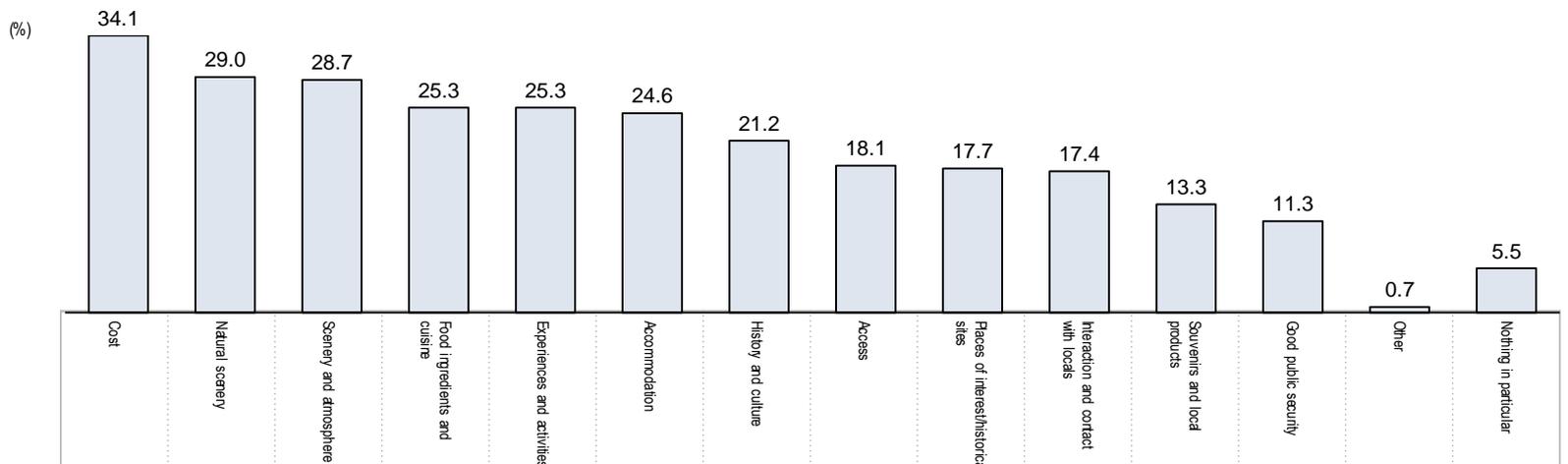
Survey Results

5. [People who have visited] Points of satisfaction

- In terms of points of satisfaction upon visiting the Philippines, “Cost” (34.1%) ranked highest, followed by “Natural scenery” (29.0%), and “Scenery and atmosphere” (28.7%).
- Gender-wise, 37.0% of females stated “Natural scenery,” and 35.9% stated “Experiences and activities,” which was higher compared to the overall group.

[People who have visited] Points of satisfaction

Q. What were you satisfied with when you visited the destination? Please answer everything that applies to each country. [The Philippines]



		n=	Cost	Natural scenery	Scenery and atmosphere	Food ingredients and cuisine	Experiences and activities	Accommodation	History and culture	Access	Places of interest/historical sites	Interaction and contact with locals	Souvenirs and local products	Good public security	Other	Nothing in particular
Overall		(293)	34.1	29.0	28.7	25.3	25.3	24.6	21.2	18.1	17.7	17.4	13.3	11.3	0.7	5.5
Gender	Male	(201)	31.8	25.4	27.9	23.4	20.4	24.4	21.4	17.9	16.4	19.4	11.4	11.4	1.0	6.0
	Female	(92)	39.1	37.0	30.4	29.3	35.9	25.0	20.7	18.5	20.7	13.0	17.4	10.9	0.0	4.3
Age	20s	(49)	32.7	18.4	20.4	18.4	22.4	16.3	18.4	14.3	14.3	14.3	12.2	10.2	0.0	6.1
	30s	(62)	37.1	21.0	24.2	27.4	35.5	21.0	24.2	21.0	16.1	14.5	14.5	22.6	0.0	1.6
	40s	(47)	36.2	34.0	29.8	23.4	23.4	27.7	25.5	14.9	19.1	17.0	14.9	10.6	0.0	4.3
	50s	(67)	34.3	37.3	29.9	29.9	28.4	31.3	23.9	23.9	23.9	26.9	11.9	10.4	1.5	6.0
	60 and over	(68)	30.9	32.4	36.8	25.0	16.2	25.0	14.7	14.7	14.7	13.2	13.2	2.9	1.5	8.8
Age and gender	Male 20s	(32)	31.3	15.6	18.8	21.9	12.5	18.8	21.9	18.8	18.8	18.8	15.6	15.6	0.0	6.3
	Male 30s	(41)	29.3	14.6	22.0	24.4	29.3	22.0	26.8	24.4	12.2	19.5	9.8	29.3	0.0	0.0
	Male 40s	(32)	40.6	34.4	31.3	25.0	21.9	28.1	28.1	15.6	18.8	12.5	15.6	9.4	0.0	3.1
	Male 50s	(46)	28.3	28.3	23.9	26.1	26.1	28.3	23.9	17.4	23.9	28.3	8.7	6.5	2.2	8.7
	Male 60 and over	(50)	32.0	32.0	40.0	20.0	12.0	24.0	10.0	14.0	10.0	16.0	10.0	0.0	2.0	10.0
	Female 20s	(17)	35.3	23.5	23.5	11.8	41.2	11.8	11.8	5.9	5.9	5.9	5.9	0.0	0.0	5.9
	Female 30s	(21)	52.4	33.3	28.6	33.3	47.6	19.0	19.0	14.3	23.8	4.8	23.8	9.5	0.0	4.8
	Female 40s	(15)	26.7	33.3	26.7	20.0	26.7	26.7	20.0	13.3	20.0	26.7	13.3	13.3	0.0	6.7
	Female 50s	(21)	47.6	57.1	42.9	38.1	33.3	38.1	23.8	38.1	23.8	23.8	19.0	19.0	0.0	0.0
	Female 60 and over	(18)	27.8	33.3	27.8	38.9	27.8	27.8	27.8	16.7	27.8	5.6	22.2	11.1	0.0	5.6



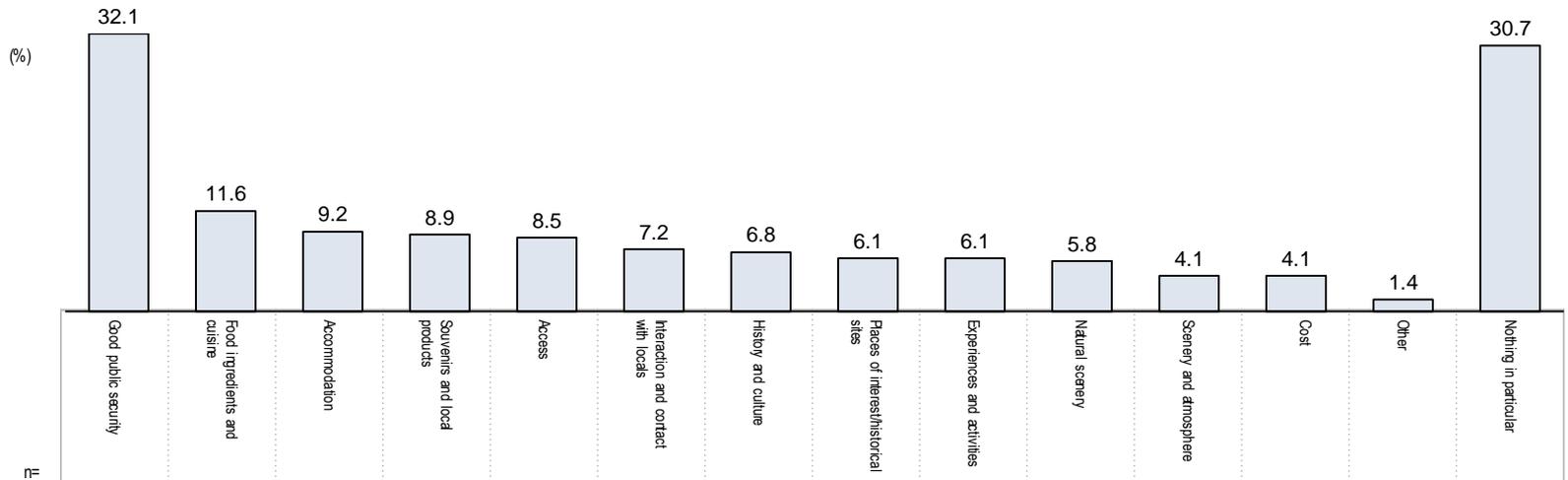
Survey Results

6. [People who have visited] Points of dissatisfaction

- As opposed to the previous page, when asked what they were dissatisfied with upon visiting the Philippines, the highest percentage of respondents answered they were not satisfied with the aspect of “Good public security” (32.1%). Age-wise, This was the response given by 41.2% of the 60 and over age group and 36.7% of people in their 20s. This response rate was high for both those aged 60 and over who visited the Philippines in 2016 or earlier, and those in their 20s, who visited the Philippines in 2018 or later.

[People who have visited] Points of dissatisfaction

Q. What were you not really satisfied with when you visited the destination? Please answer everything that applies to each country. [The Philippines]



		n=	Good public security	Food ingredients and cuisine	Accommodation	Souvenirs and local products	Access	Interaction and contact with locals	History and culture	Places of interest/historical sites	Experiences and activities	Natural scenery	Scenery and atmosphere	Cost	Other	Nothing in particular
Overall		(293)	32.1	11.6	9.2	8.9	8.5	7.2	6.8	6.1	6.1	5.8	4.1	4.1	1.4	30.7
Gender	Male	(201)	31.3	11.9	7.0	7.5	10.0	6.0	7.0	5.0	7.5	7.0	4.5	5.0	1.5	30.8
	Female	(92)	33.7	10.9	14.1	12.0	5.4	9.8	6.5	8.7	3.3	3.3	3.3	2.2	1.1	30.4
Age	20s	(49)	36.7	14.3	12.2	14.3	8.2	4.1	6.1	6.1	8.2	2.0	6.1	4.1	0.0	14.3
	30s	(62)	25.8	16.1	9.7	9.7	12.9	12.9	9.7	6.5	9.7	11.3	6.5	6.5	0.0	24.2
	40s	(47)	25.5	8.5	6.4	10.6	8.5	6.4	6.4	6.4	6.4	0.0	2.1	2.1	2.1	44.7
	50s	(67)	29.9	14.9	11.9	7.5	6.0	4.5	3.0	7.5	1.5	10.4	4.5	6.0	4.5	41.8
	60 and over	(68)	41.2	4.4	5.9	4.4	7.4	7.4	8.8	4.4	5.9	2.9	1.5	1.5	0.0	27.9
Age and gender	Male 20s	(32)	31.3	18.8	9.4	9.4	9.4	3.1	6.3	6.3	9.4	3.1	9.4	6.3	0.0	12.5
	Male 30s	(41)	29.3	14.6	7.3	9.8	14.6	12.2	12.2	7.3	14.6	14.6	7.3	9.8	0.0	22.0
	Male 40s	(32)	18.8	9.4	6.3	9.4	6.3	3.1	6.3	9.4	6.3	0.0	0.0	3.1	0.0	50.0
	Male 50s	(46)	28.3	15.2	8.7	6.5	8.7	4.3	2.2	4.3	2.2	13.0	4.3	4.3	6.5	41.3
	Male 60 and over	(50)	44.0	4.0	4.0	4.0	10.0	6.0	8.0	0.0	6.0	2.0	2.0	2.0	0.0	28.0
	Female 20s	(17)	47.1	5.9	17.6	23.5	5.9	5.9	5.9	5.9	5.9	0.0	0.0	0.0	0.0	17.6
	Female 30s	(21)	19.0	19.0	14.3	9.5	9.5	14.3	4.8	4.8	4.8	0.0	4.8	4.8	0.0	28.6
	Female 40s	(15)	40.0	6.7	6.7	13.3	13.3	13.3	6.7	0.0	6.7	0.0	6.7	0.0	6.7	33.3
	Female 50s	(21)	33.3	14.3	19.0	9.5	0.0	4.8	4.8	14.3	0.0	4.8	4.8	9.5	0.0	42.9
	Female 60 and over	(18)	33.3	5.6	11.1	5.6	0.0	11.1	11.1	16.7	5.6	5.6	0.0	0.0	0.0	27.8



Survey Results

[Reference] Comparison of points of satisfaction/dissatisfaction

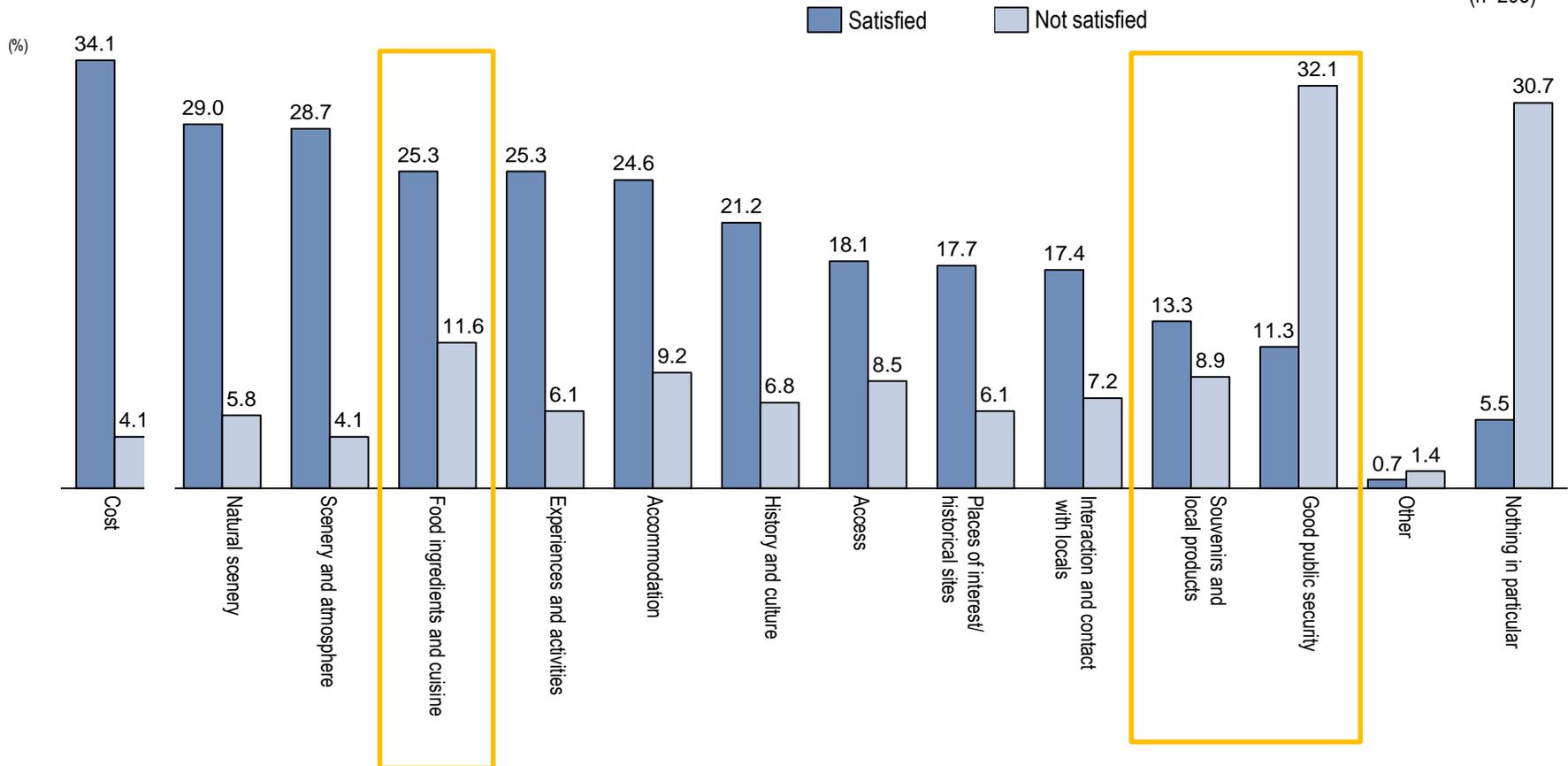
- A comparison of points of satisfaction and points of dissatisfaction showed that, overall, a high percentage of respondents answered “Satisfied.” Although the level of satisfaction was high for “Food ingredients & cuisine” the “Not satisfied” response rate for this item was also high, therefore personal preference is believed to be a factor. Moreover, there is room for improvement regarding the aspect of “Souvenirs & local products.”
- The overwhelmingly high percentage of respondents dissatisfied with “Public security” suggests the importance of alleviating such concerns.

[People who have visited] Points of satisfaction/dissatisfaction

Q. What were you satisfied with when you visited the destination? Please answer everything that applies to each country. [The Philippines]

Q. What were you not really satisfied with when you visited the destination? Please answer everything that applies to each country. [The Philippines]

(n=293)





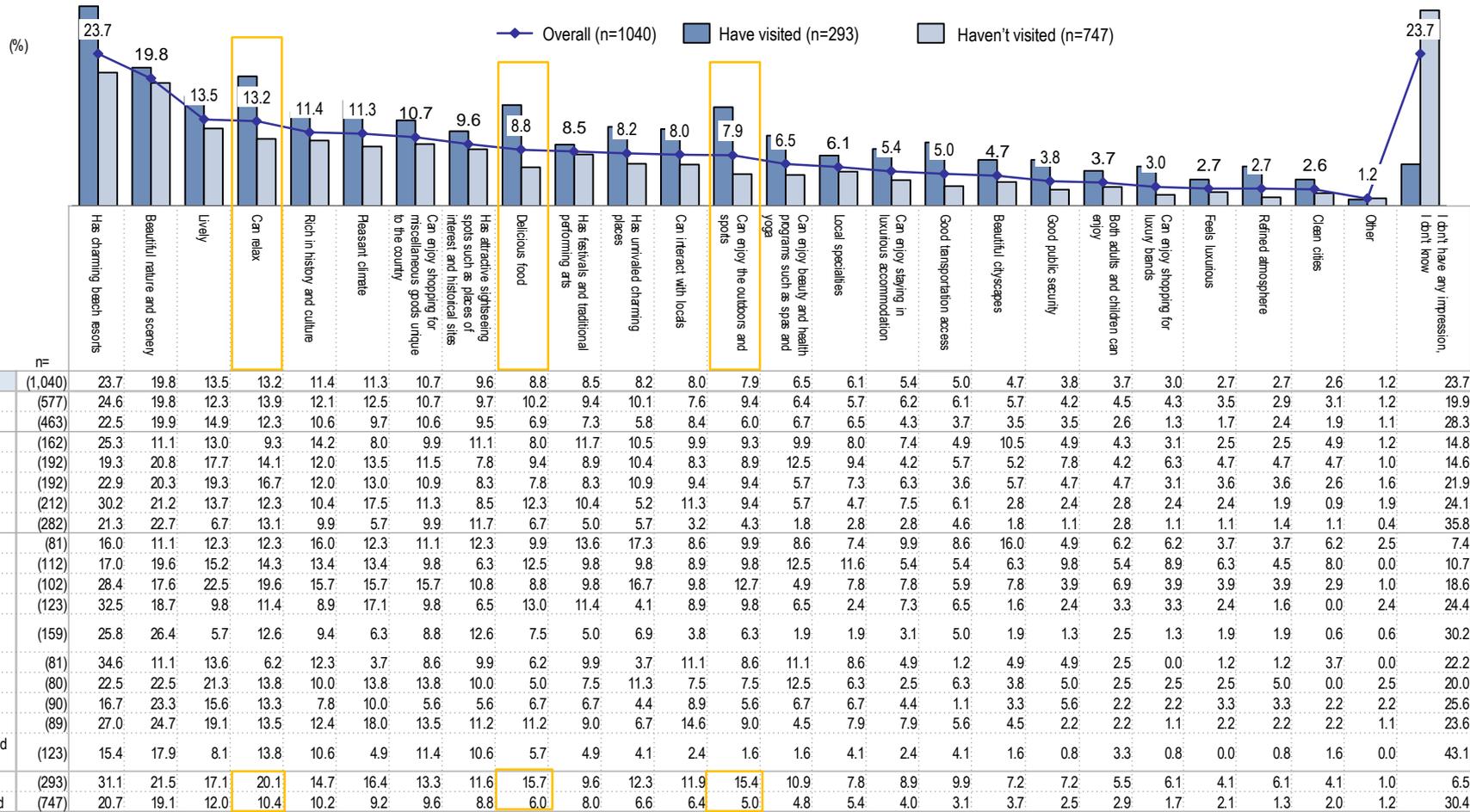
Survey Results

7. Impression of the Philippines

- When all respondents were asked their impression of the Philippines, the responses were “Charming beach resorts” (23.7%), “Beautiful nature and scenery” (19.8%), and “Lively” (13.5%). Overall, impressions of the Philippines as offering nature and resort aspects ranked high.
- A high percentage of those who’d visited the Philippines answered “Can relax,” “Delicious food,” and “Can enjoy the outdoors and sport.”

Impression of the Philippines

Q. What are your impressions of the following 10 countries? Please answer everything that applies to each country. [The Philippines]





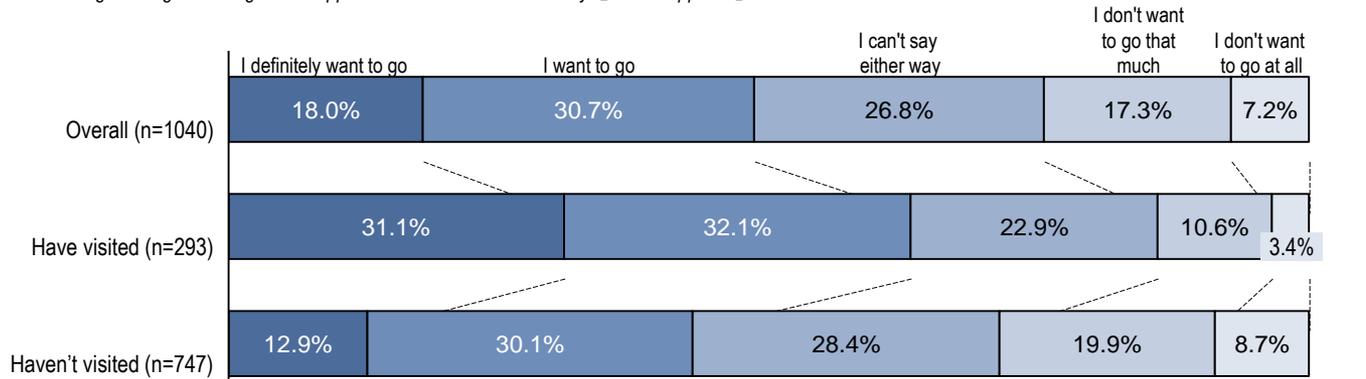
Survey Results

8. Intention to visit (sightseeing)

- Regarding intention to travel to the Philippines, 48.7% of the overall group answered “I want to go.” (“Definitely want to go” & “I want to go”)
- A high percentage of those who had visited wanted to go again (63.2%). Also, a higher percentage of males expressed intention to go to the Philippines than females.

Intention to visit the Philippines (sightseeing)

Q. Would you like to travel to the following countries for sightseeing? Please give one applicable answer for each country. [The Philippines]



		n=	I definitely want to go	I want to go	I can't say either way	I don't want to go that much	I don't want to go at all	(%)	
	Overall	(1,040)	18.0	30.7	26.8	17.3	7.2		
Gender	Male	(577)	19.9	34.1	24.8	15.8	5.4		
	Female	(463)	15.6	26.3	29.4	19.2	9.5		
Age	20s	(162)	19.1	34.6	24.1	16.0	6.2		
	30s	(192)	24.0	33.3	27.6	10.9	4.2		
	40s	(192)	22.9	30.7	20.8	15.6	9.9		
	50s	(212)	17.0	31.6	25.0	17.5	9.0		
	60 and over	(282)	10.6	25.9	33.3	23.4	6.7		
	Age and gender	Male 20s	(81)	19.8	40.7	24.7	9.9	4.9	
Male 30s		(112)	24.1	33.9	30.4	8.9	2.7		
Male 40s		(102)	27.5	33.3	19.6	12.7	6.9		
Male 50s		(123)	19.5	31.7	25.2	15.4	8.1		
Male 60 and over		(159)	12.6	33.3	23.9	25.8	4.4		
Female 20s		(81)	18.5	28.4	23.5	22.2	7.4		
Female 30s		(80)	23.8	32.5	23.8	13.8	6.3		
Female 40s		(90)	17.8	27.8	22.2	18.9	13.3		
Female 50s		(89)	13.5	31.5	24.7	20.2	10.1		
Female 60 and over		(123)	8.1	16.3	45.5	20.3	9.8		
Visited/not visited		Have visited	(293)	31.1	32.1	22.9	10.6	3.4	
		Haven't visited	(747)	12.9	30.1	28.4	19.9	8.7	



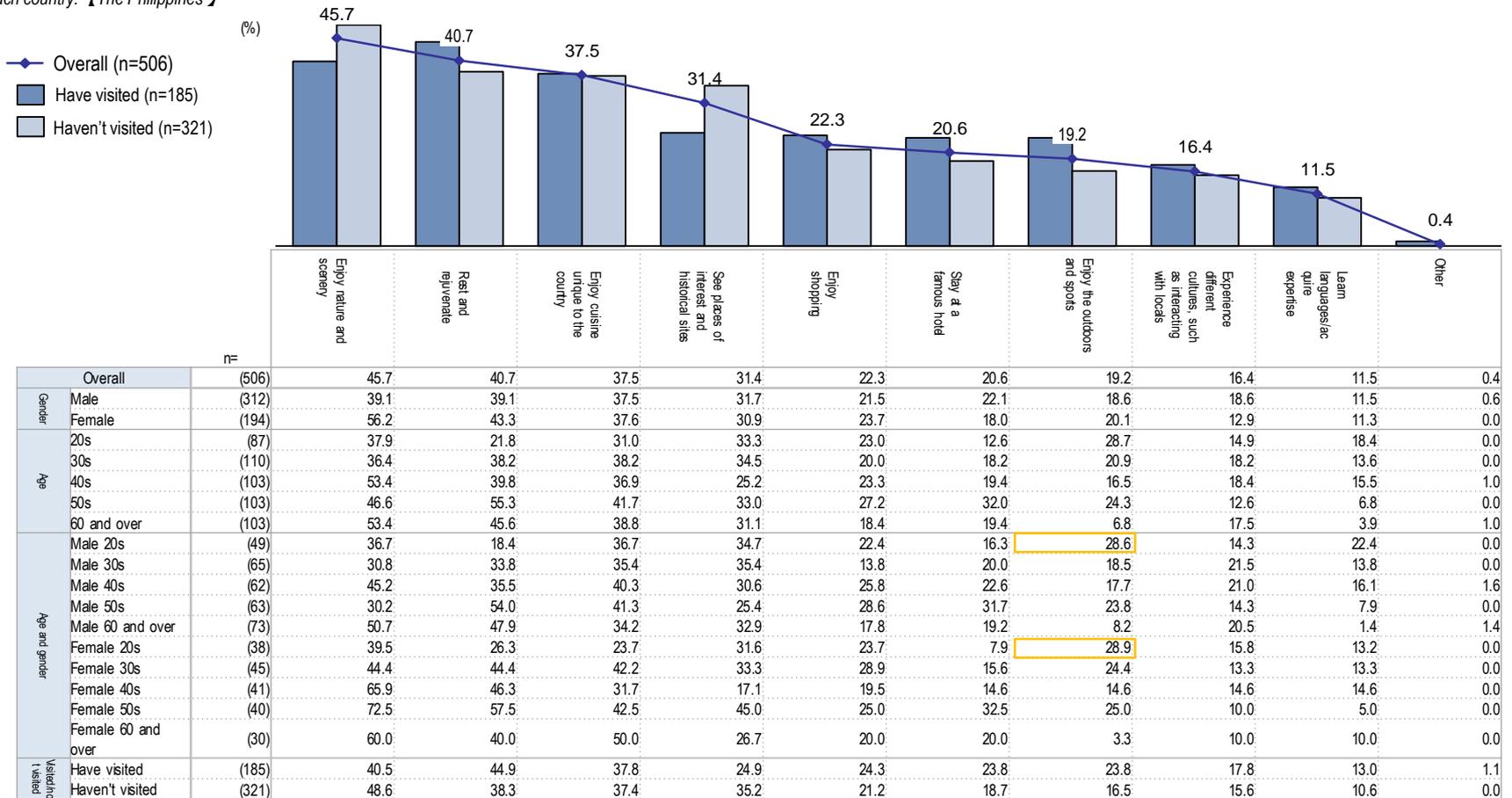
Survey Results

9. [People with intention to visit] What respondent wants to do at destination

- When those respondents who answered "I definitely want to go" or "I want to go" in the previous question were asked what they want to do in the Philippines, most (45.7%) answered "Enjoy nature and scenery", and 40.7% answered "Rest and rejuvenate."
- Age-wise, a higher percentage of males/females in their 20s answered "Enjoy the outdoors and sports" than any other age group.

[People with intention to visit] What respondent wants to do in the Philippines

Q. This question is for respondents who answered "I definitely want to go" or "I want to go" in the previous question. What would you like to do if you take a sightseeing trip to the country? Please give all applicable answers for each country. [The Philippines]





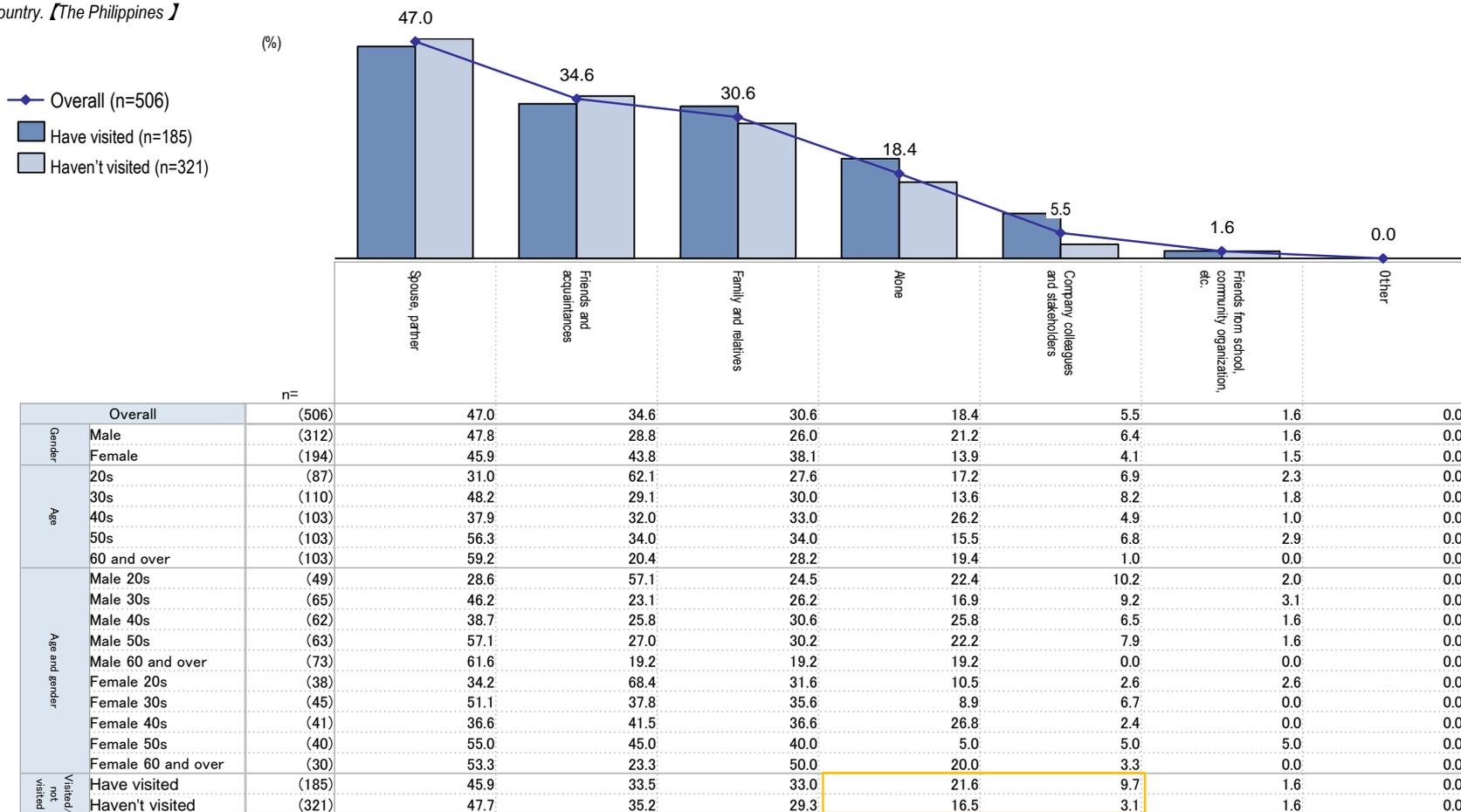
Survey Results

10. [People with intention to visit] Who respondent wants to go with (Travel companion)

- When asked who they'd like to travel to the Philippines with, the highest percentage of respondents answered "Spouse/partner" (47.0%), followed by "Friends and acquaintances" (34.6%).
- People who'd previously visited the Philippines had a higher response rate of "Company colleagues and stakeholders," and "Alone" compared to the overall group.

[People with intention to visit] Preferred travel companion to the Philippines

Q. This question is for respondents who answered "I definitely want to go" or "I want to go" in the previous question. If you were to make the trip, who would you like to travel with? Please give all applicable answers for each country. [The Philippines]





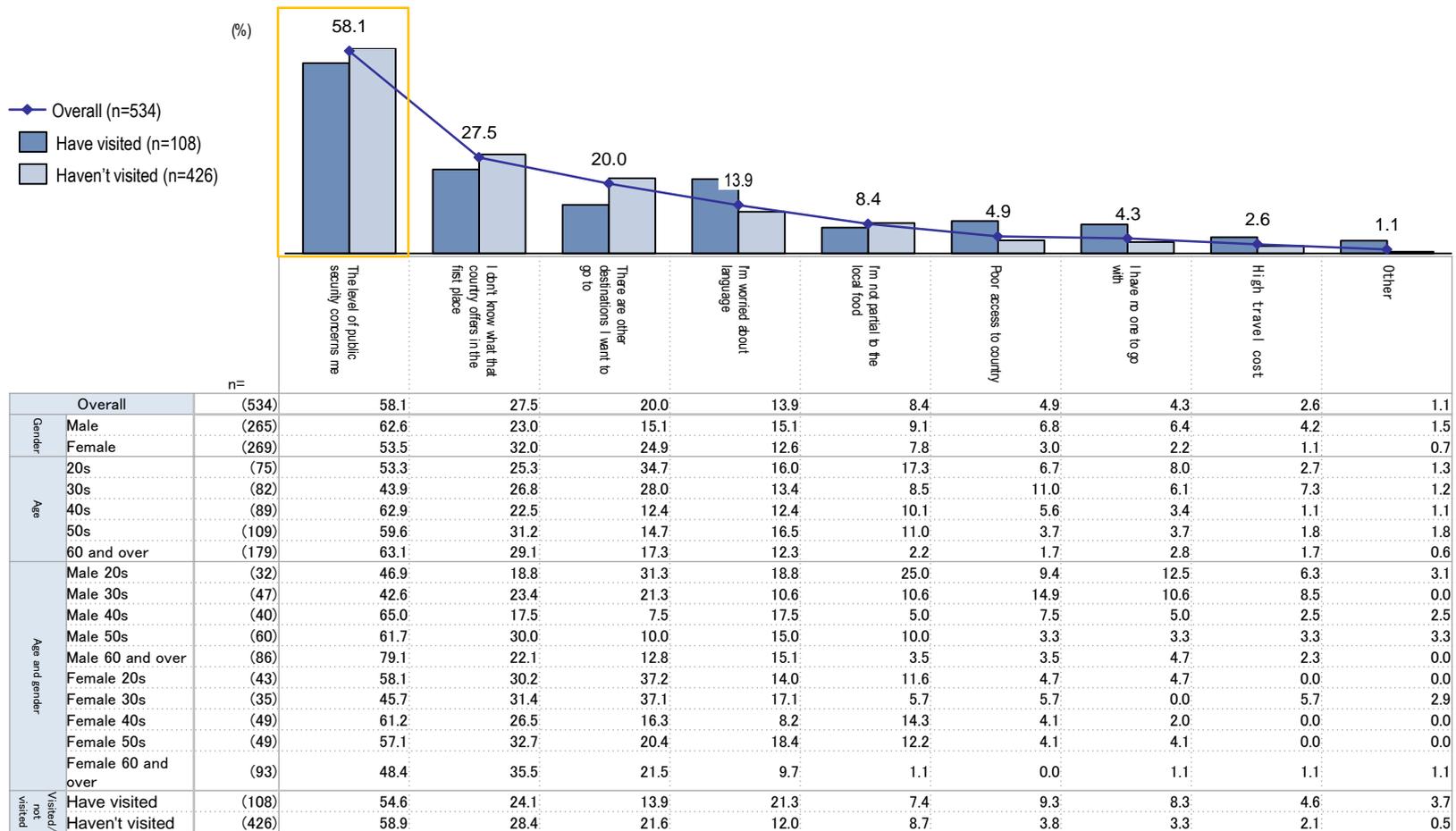
Survey Results

11. [People with no intention to visit] Reasons for having no intention to visit

- When respondents who answered "I can't say either way," "I don't want to go that much," or "I don't want to go at all" regarding their intention to visit the Philippines were asked the reason why, the overwhelming percentage of people (58.1%) answered "The level of public security concerns me," and there was no apparent gap between people who'd visited the Philippines already and those who had not.

[People with no intention to visit] Reasons for having no intention to visit the Philippines

Q. This question is for respondents who answered "I can't say either way," "I don't want to go that much," or "I don't want to go at all" in the previous question. Why don't you want to take a sightseeing trip to that destination? Please give all applicable answers for each country. **[The Philippines]**





Survey Results

12. Awareness of tourism resources

- When asked their level of awareness of the Philippines's major five tourism resources, the highest percentage of respondents answered "I've heard of it and I know what kind of place it is" for Cebu (55.3%).
- Excluding Cebu, males had higher awareness of all the other sightseeing resources, particularly males in their 20s had high awareness of Palawan Island and Bohol.

Awareness of tourism resources

Q. Do you know the following places and tourist spots? Please give one applicable answer for each. *[The Philippines]*

(%)

		Manila			Cebu			Boracay			Palawan Island			Bohol			
		I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	
Overall		(1,040)	49.4	44.1	6.4	55.3	38.1	6.6	17.8	33.1	49.1	11.7	21.7	66.5	11.7	23.6	64.7
Gender	Male	(577)	54.9	39.2	5.9	54.8	37.3	8.0	18.9	34.8	46.3	15.1	26.5	58.4	13.2	26.5	60.3
	Female	(463)	42.5	50.3	7.1	55.9	39.1	5.0	16.4	30.9	52.7	7.6	15.8	76.7	9.9	19.9	70.2
Age	20s	(162)	35.2	50.6	14.2	54.9	35.8	9.3	19.8	35.2	45.1	16.0	24.1	59.9	11.1	27.8	61.1
	30s	(192)	40.6	47.9	11.5	50.0	37.5	12.5	17.7	34.4	47.9	10.4	25.0	64.6	13.0	28.1	58.9
	40s	(192)	56.8	40.1	3.1	64.1	32.3	3.6	18.8	38.5	42.7	11.5	19.8	68.8	13.0	22.9	64.1
	50s	(212)	59.4	38.2	2.4	64.2	33.0	2.8	20.3	32.5	47.2	12.3	24.5	63.2	13.7	21.7	64.6
	60 and over	(282)	51.1	45.0	3.9	46.5	47.5	6.0	14.2	27.7	58.2	9.9	17.4	72.7	8.9	19.9	71.3
Age and gender	Male 20s	(81)	35.8	48.1	16.0	53.1	33.3	13.6	23.5	35.8	40.7	23.5	33.3	43.2	18.5	35.8	45.7
	Male 30s	(112)	39.3	48.2	12.5	48.2	36.6	15.2	17.9	38.4	43.8	13.4	30.4	56.3	15.2	32.1	52.7
	Male 40s	(102)	68.6	28.4	2.9	62.7	32.4	4.9	18.6	37.3	44.1	14.7	23.5	61.8	15.7	23.5	60.8
	Male 50s	(123)	67.5	30.1	2.4	64.2	32.5	3.3	21.1	35.0	43.9	13.8	28.5	57.7	11.4	24.4	64.2
	Male 60 and over	(159)	57.2	42.1	0.6	47.8	46.5	5.7	15.7	30.2	54.1	13.2	20.8	66.0	8.8	21.4	69.8
	Female 20s	(81)	34.6	53.1	12.3	56.8	38.3	4.9	16.0	34.6	49.4	8.6	14.8	76.5	3.7	19.8	76.5
	Female 30s	(80)	42.5	47.5	10.0	52.5	38.8	8.8	17.5	28.8	53.8	6.3	17.5	76.3	10.0	22.5	67.5
	Female 40s	(90)	43.3	53.3	3.3	65.6	32.2	2.2	18.9	40.0	41.1	7.8	15.6	76.7	10.0	22.2	67.8
	Female 50s	(89)	48.3	49.4	2.2	64.0	33.7	2.2	19.1	29.2	51.7	10.1	19.1	70.8	16.9	18.0	65.2
	Female 60 and over	(123)	43.1	48.8	8.1	44.7	48.8	6.5	12.2	24.4	63.4	5.7	13.0	81.3	8.9	17.9	73.2
Visited/not visited	Have visited	(293)	70.0	24.2	5.8	75.8	18.1	6.1	38.2	37.5	24.2	27.0	32.4	40.6	28.3	36.2	35.5
	Haven't visited	(747)	41.4	51.9	6.7	47.3	45.9	6.8	9.8	31.3	58.9	5.8	17.5	76.7	5.2	18.6	76.2



Survey Results

13. Photo preference

- When we asked respondents to choose the photo of the Philippines they like the most out of three photos, ② Cebu was the most popular overall at 61.3%. In particular, 75.3% of females in their 20s chose photo ②.
- ① Manila was popular compared amongst males in their 40s compared to the overall group.

Photo preference (The Philippines)

Q. There are 3 photos for each of the following 10 countries. Which photo do you like the most? Please tell us which photo you like the most for each country. [The Philippines]

(%)

