

# Consumers Insight Report

## Philippine Department of Tourism





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# INTRODUCTION

# Analysis of Online Survey among the UK & Ireland on the New Travel Standard of the Philippines

We conducted an online survey through our Social Media channels to get a sense of how the UK and Ireland see travel in the COVID-19 situation and the way forward. This report outlines our observations.

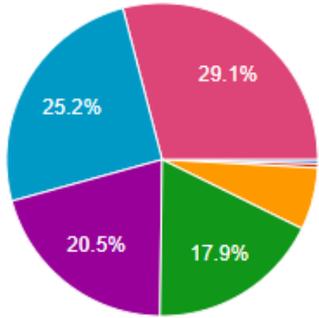
- Survey period – July 23 to August 14
- Survey method – Online survey
- Number of respondents – 259 (239 UK Residents and 25 Republic of Ireland Residents)
- Traffic source – Facebook, Instagram, eDM



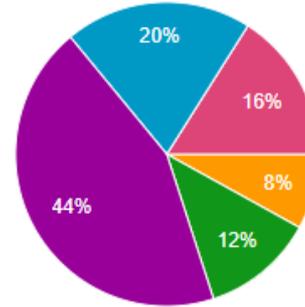


# 2 DEMOGRAPHICS

# What is your age?



United Kingdom



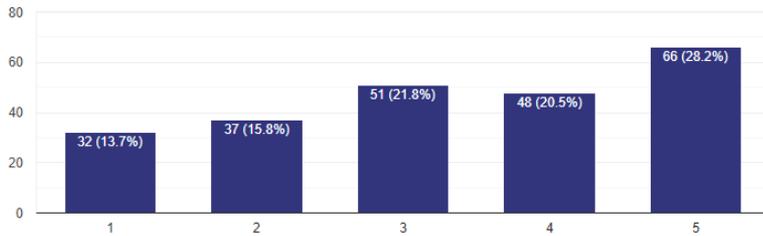
Republic of Ireland



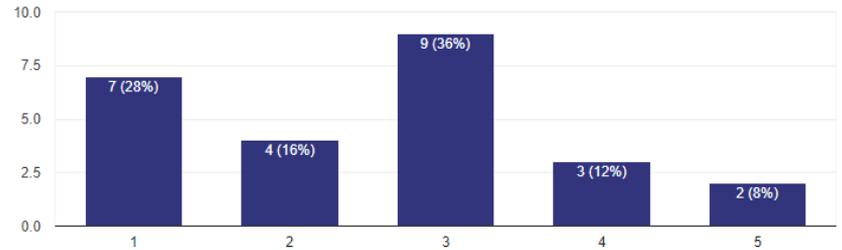
UK: The majority of the respondents that answered the survey were aged 60 years old and above (29.1%). The survey was also answered by the age groups of 31-40 (17.9%), 41-50 (20.5%) and 51-60 (25.2%) respectively. In summary, the age group between 30s to 60+ occupies 92.7% of the respondents and it could reflect the older generation who are more concerned with the New Travel Standards.

Republic of Ireland: The majority of the respondents that answered the survey were aged 41-50 (44%). The survey was also answered by the age groups of 31-40 (12%), 51-60 (20%) and 60+ (16%) respectively. In summary, the age group between 30s to 60+ occupies 92% of the respondents and it could reflect the older generation who are more concerned with the New Travel Standards.

# Do you feel like you have lower propensity to spend for travel during this pandemic due to possible loss of income and other earning opportunities?



United Kingdom

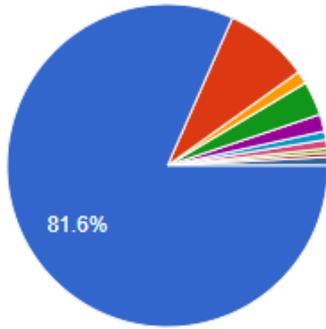


Republic of Ireland

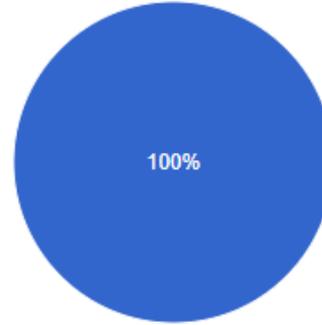
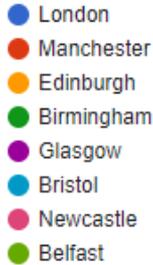
UK: With 1 being 'strongly agree' to 5 being 'strongly disagree', the majority of respondents answered that they feel they do not have a lower propensity to spend (28.2%). With just under half (48.7%) of total responses taking share of there being no affect to lower propensity of spend towards travel. This is positive that consumers are still willing to spend despite possible loss of income and other earning opportunities.

Republic of Ireland: The majority of respondents were sitting on the fence towards propensity to spend for travel (36%). When we look at the total share of respondents, there were more who felt they had a lower propensity to spend (44%) compared to those who did not (20%).

# Main airport used when travelling overseas



**United Kingdom**



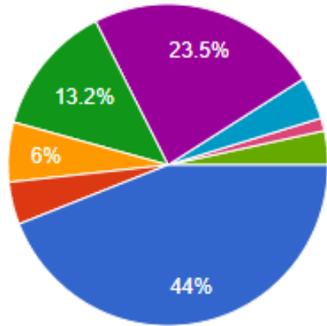
**Republic of Ireland**



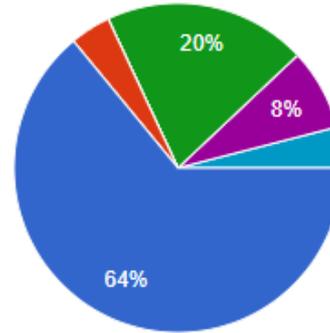
UK: The results show that a large number of residents are residing in London (81.6%), the capital and largest metropolis of the UK. Followed by Manchester (8.5%) and Birmingham (3.4%)

Republic of Ireland: The results show that all residents are residing in Dublin (100%), the capital and largest metropolis of the Republic of Ireland.

# What is your occupation?



United Kingdom



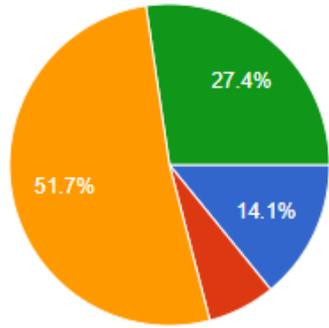
Republic of Ireland



UK: The survey was answered mostly by office workers (employees, 44%), resulting in the majority of the results reflecting the opinions of office workers and employed people. The data can also be interpreted that employed people or people with stable sources of income are more interested in travel or are more likely to search for information related to travel.

Republic of Ireland: The survey was answered mostly by office workers (employees, 64%), resulting in the majority of the results reflecting the opinions of office workers and employed people. The data can also be interpreted that employed people or people with stable sources of income are more interested in travel or are more likely to search for information related to travel.

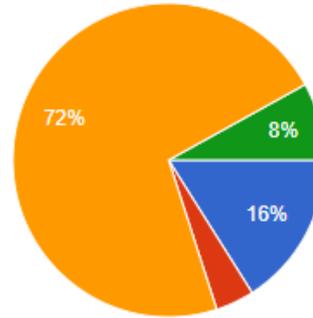
# What is your highest level of education?



**United Kingdom**

UK: The survey was answered mostly by those with a college graduation (51.7%), followed by a master's degree or above (27.4%)

- High school level
- High school graduate
- College graduate
- Master's degree or above



**Republic of Ireland**

Republic of Ireland: The survey was answered mostly by those with a college graduation (72%), followed by those with high school level entry (16%)

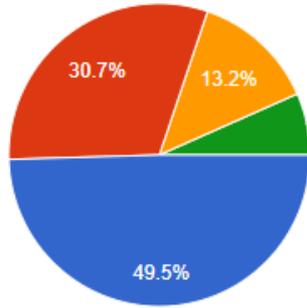
- High school level
- High school graduate
- College graduate
- Master's degree or above



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TRAVEL BEHAVIOUR

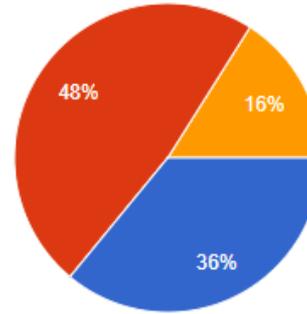
# How often do you travel to the Philippines?



**United Kingdom**

UK: Almost 5 out of 10 people (49.5%) have answered they travel to the Philippines once a several years. In other words, the rest (50.5%) enjoy traveling (or visiting) to the Philippines at least once a year.

- Once every few years
- Once a year
- 2-4 times a year
- More than 4 times a year

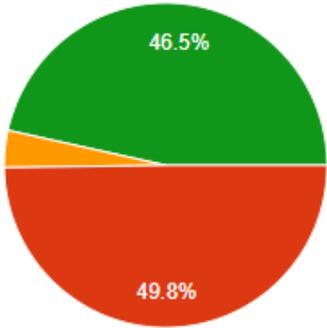


**Republic of Ireland**

Republic of Ireland: Almost 4 out of 10 people (36%) have answered they travel to the Philippines once a several years. In other words, the rest (64%) enjoy traveling (or visiting) to the Philippines at least once a year.

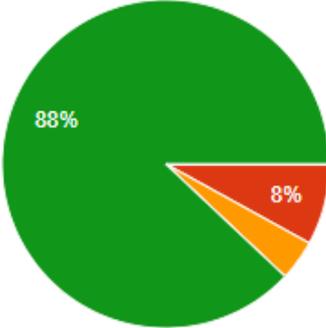
- Once every few years
- Once a year
- 2-4 times a year
- More than 4 times a year

# What is the main purpose of your visit to the Philippines?



United Kingdom

- Business
- Travel/Vacation
- Business and leisure activities
- Friends and relatives visit
- School/Education
- Medical



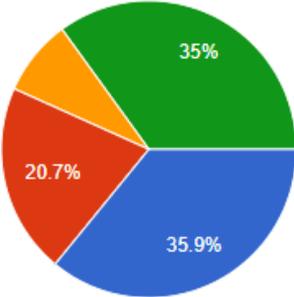
Republic of Ireland

- Business
- Travel/Vacation
- Business and leisure activities
- Friends and relatives visit
- School/Education
- Medical

UK: There is a definite 50/50 split between visiting the Philippines for travel and vacation (49.8%) and visiting friends and relatives (46.5%), with other purposes of visiting for business and leisure activities (3.7%).

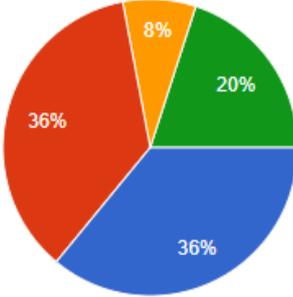
Republic of Ireland: Overwhelming majorities have answered they visit the Philippines for friend and relatives visit (88%). Other purposes of visiting were travel and vacation (8%), and business and leisure (4%).

# Who do you travel with?



- Solo
- Family
- Friends, Coworkers
- Partner, Spouse

United Kingdom



- Solo
- Family
- Friends, Coworkers
- Partner, Spouse

Republic of Ireland

UK: Majority of the respondents answered that they travel alone to the Philippines (35.9%), closely followed by travelling with their partner (35%). As Philippines is also a famous family travel destination it is now surprise a large number of respondents travel with their family (20.7%).

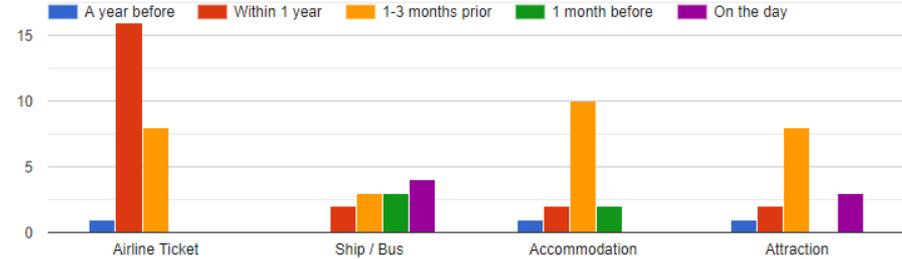
Republic of Ireland: As the Philippines is famous as a family travel destination, a large number of respondents answered they travel with family (36%), equally followed by travelling solo (36%). Secondly, travel with partner/spouse (20%).

# How long do you buy tickets before travelling?



## United Kingdom

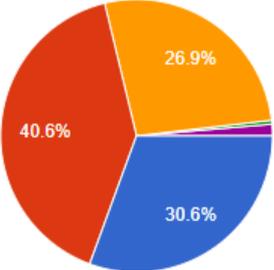
UK: The results obtained show that Brits normally buy tickets for accommodations, and other leisure facilities and tour attractions 1 to 3 months before the actual travel. Whereas with an airline ticket, they tend to purchase this within the year. This means that for us to maximize the effect, we should prepare and start the promotions of accommodation and other facilities at least 1 to 3 months before the vacation seasons (or peak seasons) start, keeping in mind that they've already purchased airline tickets. Therefore, we should continue to keep aspirational content live to retain front of mind for all consumers year-round.



## Republic of Ireland

Republic of Ireland: The results obtained show that Brits normally buy tickets for accommodations and tour attractions 1 to 3 months before the actual travel. Whereas with an airline ticket, they tend to purchase this within the year. This means that for us to maximize the effect, we should prepare and start the promotions of accommodation and other facilities at least 1 to 3 months before the vacation seasons (or peak seasons) start, keeping in mind that they've already purchased airline tickets. Therefore, we should continue to keep aspirational content live to retain front of mind for all consumers year-round.

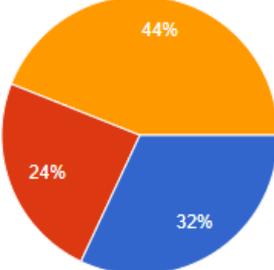
# How many people do you travel with?



- None
- 1 person
- 2 to 6 people
- 6 to 10 people
- 10 or more

United Kingdom

UK: Most people answered they travel with one other person (40.6%). If we include people who said they travel with 2-6 (26.9%), almost 7 out of 10 people (67.5%) answered that they travel as a group composed of 2 to 7 people. Also notable to mention that one third of the respondents travelled alone (30.6%).

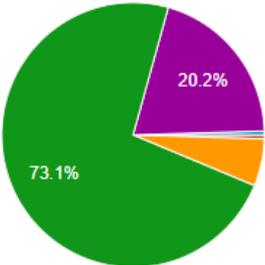


- None
- 1 person
- 2 to 6 people
- 6 to 10 people
- 10 or more

Republic of Ireland

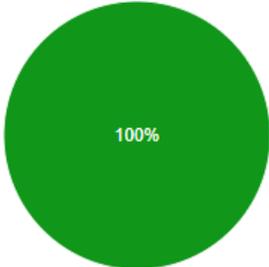
Republic of Ireland: Most people answered they travel with 2-6 people(44%). If we include people who said they travel with 1 person (24%), almost 7 out of 10 people (68%) answered that they travel as a group composed of 2 to 7 people. Also notable to mention that one third of the respondents travelled alone (32%).

# What is the length of your stay in the Philippines?



United Kingdom

- 1-2 days transit stay only
- 3-5 days
- 6-7 days
- More than 8 days
- More than 5 days
- Day trip only



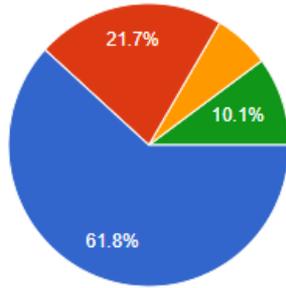
Republic of Ireland

- 1-2 days transit stay only
- 3-5 days
- 6-7 days
- More than 8 days

UK: In the results, about 93.3% of the respondents stayed in the Philippines for more than 8 days.

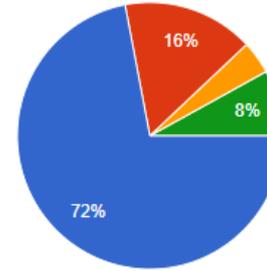
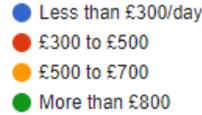
Republic of Ireland: In the results, 100% of the respondents stayed in the Philippines for more than 8 days.

# How much do you spend on your travel per day excluding airfare?



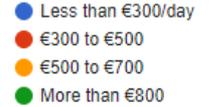
United Kingdom

UK: A large majority (61.8%) answered they spend less than £300 per day to travel in the Philippines. This amount includes meals, accommodations, transportations, tour expenses, etc. Interestingly, 10% of the respondents said they spend more than £800 per day. This group could be categorized as luxury and high-end tourists.

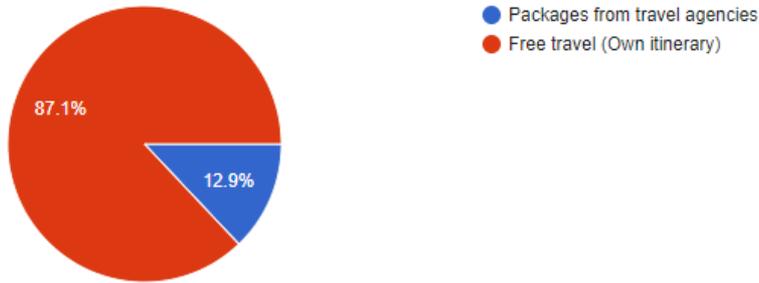


Republic of Ireland

Republic of Ireland: A large majority (72%) answered they spend less than €300 per day to travel in the Philippines. This amount includes meals, accommodations, transportations, tour expenses, etc. Interestingly, 8% of the respondents said they spend more than €800 per day. This group could be categorized as luxury and high-end tourists.

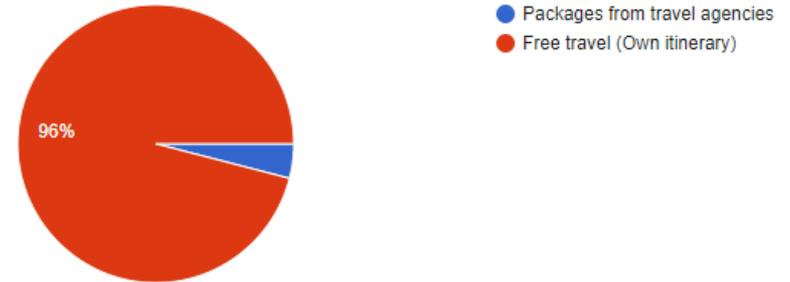


# Which travel do you prefer?



## United Kingdom

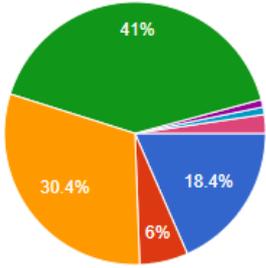
UK: The overwhelming majority of the respondents chose Free travel (87.1%) over packages from travel agencies (12.9%). However, in recent years, we see trends of individual tourists making their own travel arrangements. Travel industry experts also forecast that in the next three to five years, outbound market will be mainly FITs in their 20s, 30s, and 40s confident of making their own travel arrangements. As such, we should not neglect to capture FIT market when we promote the country.



## Republic of Ireland

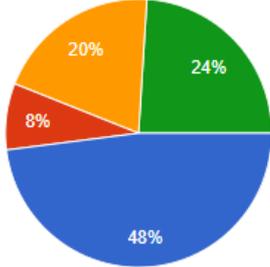
Republic of Ireland: The overwhelming majority of the respondents chose Free travel (96%) over packages from travel agencies (4%).

# Where do you usually make travel reservations?



United Kingdom

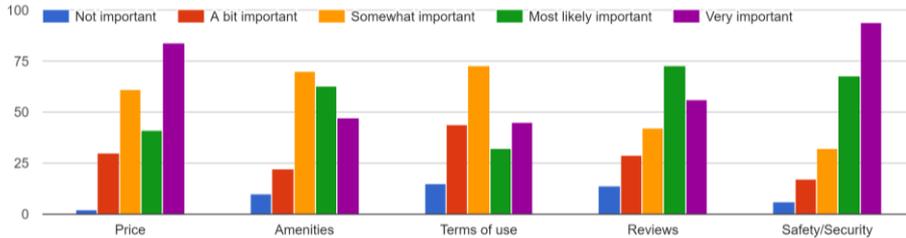
UK: 41% of the respondents have answered they use OTAs or meta search engines when they make travel reservations. Only 18.4% have answered they visit or call travel agencies directly. This means that the travel trend is shifting from package travel to FIT. Additionally, a vast majority (30.4%) will book direct through an airline or hotel further shifting to FIT travel.



Republic of Ireland

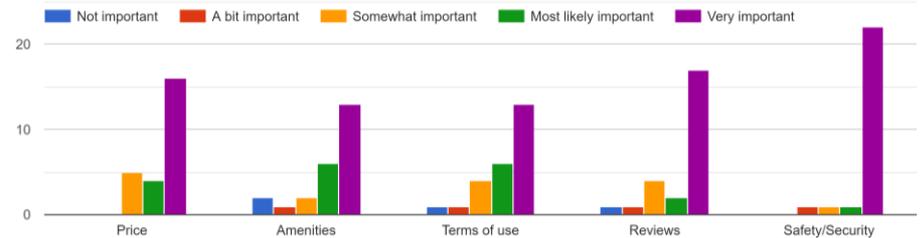
Republic of Ireland: The majority of respondent's book through a travel agency (48%) and if we connect the previous question it can appear as if they are booking FIT travel and bespoke itineraries. This was closely followed by OTA's (24%) and booking direct through a hotel/airline (20%).

# How important is each item below when booking a trip?



## United Kingdom

UK: The majority answered that safety/security is very important when booking a trip. Many respondents also picked price as one of their key factors when they book, followed by positive reviews, amenities, terms of use, etc.



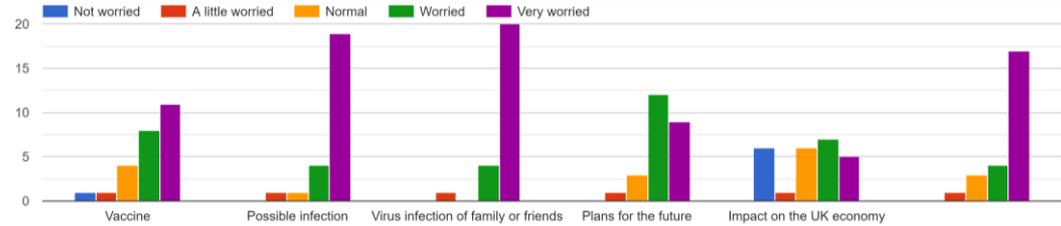
## Republic of Ireland

Republic of Ireland: The majority answered that safety/security is very important when booking a trip. Many respondents also picked price and positive reviews as one of their key factors when they book, followed by amenities, terms of use, etc.

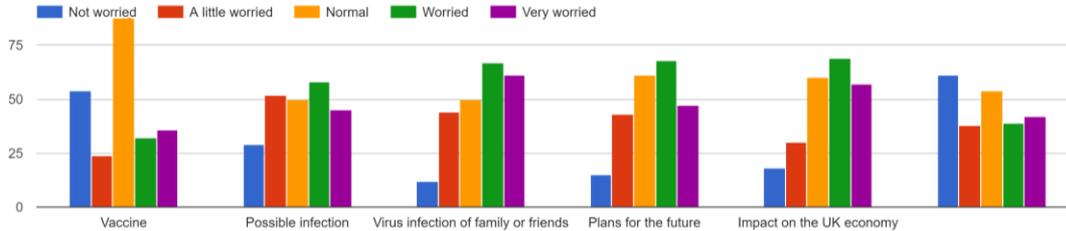


# 4 COVID-19 SITUATION

# How concerned are you about the items below when thinking about the current COVID-19 situation?



## Republic of Ireland

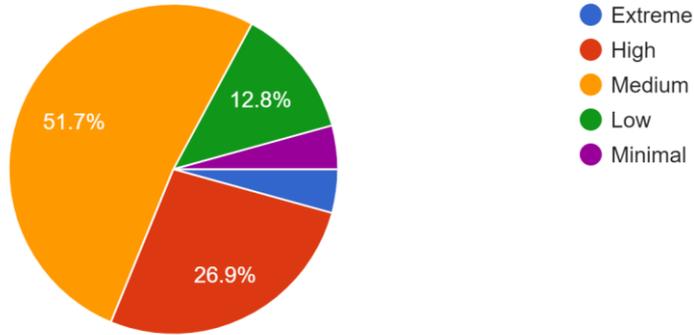


## United Kingdom

UK: The respondents answered 'worried' (or 'very worried') to most items. The biggest concerns about the COVID-19 situation they answered are 'Impact on the UK economy' and 'Plans for the future', and 'Virus infection of family and friends'. This means that people mostly worried about the future and their financials as well as possible infection.

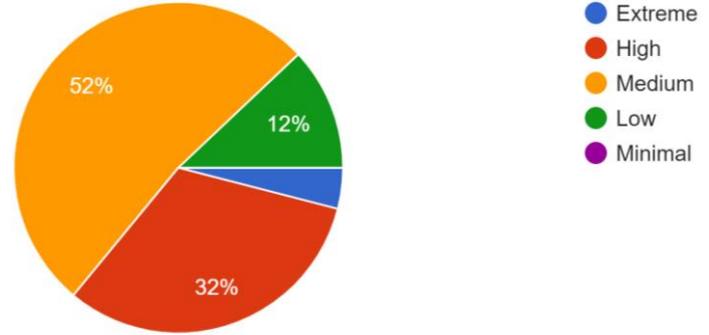
Republic of Ireland: The respondents answered 'worried' (or 'very worried') to most items. The biggest concerns about the COVID-19 situation they answered are 'Virus infection of family and friends' and 'Possible infection'. This means that people are pretty much worried about infection and the fact that COVID-19 is highly contagious but has no cure yet. Therefore, unless a cure can be found or mass infection do not occur anymore, the situation may remain unchanged.

# How much do you expect the severity of the COVID-19 situation in the UK to change next month?



**United Kingdom**

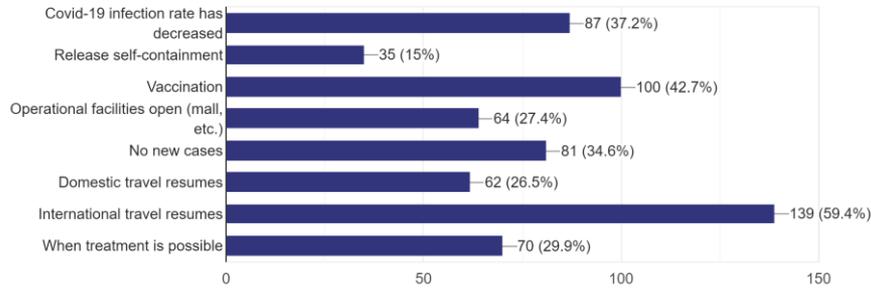
UK: The results show that 'high to extreme severity' ( $26.9\% + 4.3\% = 31.2\%$ ) holds a higher share over 'low to minimal severity' ( $12.8\% + 4.3\% = 17.1\%$ ). This shows that Brits are anticipating a second wave or to go back down into extreme lockdown.



**Republic of Ireland**

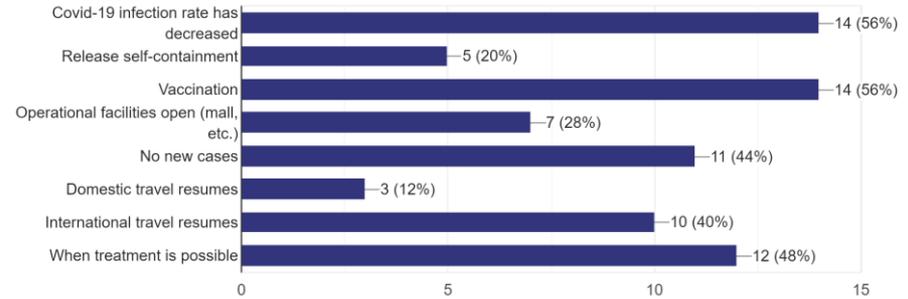
Republic of Ireland: The results show that 'high to extreme severity' ( $32\% + 4\% = 36\%$ ) holds a higher share over 'low to minimal severity' (12%). This shows that they are anticipating a second wave or to go back down into extreme lockdown.

# What situations make you feel like you are back to your normal life?



## United Kingdom

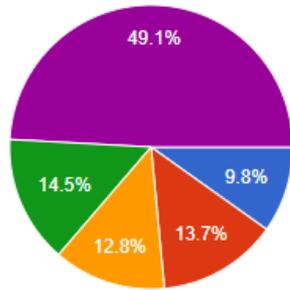
UK: The respondents chose international travel resumes (59.4%), development of vaccination (42.7%) and decrease in the infection rate (37.2%) for them to feel that they are back to normal life. The results prove that many of our respondents are looking forward to being able to travel again.



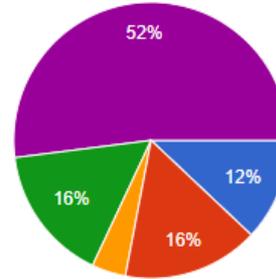
## Republic of Ireland

Republic of Ireland: The respondents chose development of vaccination (56%) and decrease in the infection rate (56%) for them to feel that they are back to normal life. Closely followed by when treatment is possible (48%) and no new cases (44%). The results prove how much people are looking forward to a cure or vaccine for COVID-19, and they maybe continue to avoid international travel until the pandemic situation is resolved or at least gets improved.

# How much of your annual income has been reduced by COVID-19?



United Kingdom



Republic of Ireland



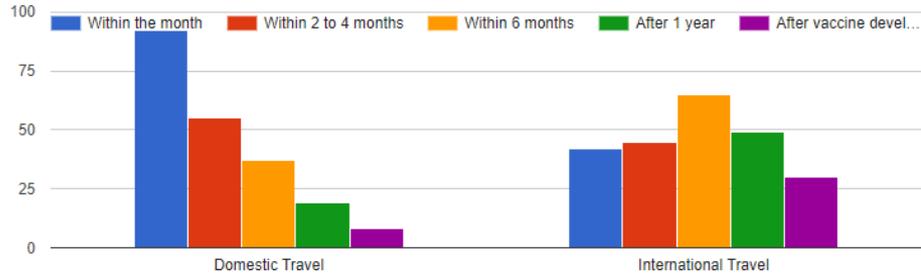
UK: Nearly half (49.1%) of respondent's household income has remained unchanged with the remaining stating that their household income has decreased due to Covid-19 outbreak.

Republic of Ireland: Over half (52%) of respondent's household income has remained unchanged with the remaining stating that their household income has decreased due to Covid-19 outbreak.

An aerial photograph of the Chocolate Hills in Bohol, Philippines, showing rolling green hills under a cloudy sky. A large white number '5' is positioned on the left side of the image. To its right, the text 'TRAVEL DURING THE PANDEMIC PERIOD' is written in white, bold, uppercase letters. A large, semi-transparent white graphic element, resembling a stylized '5' or a large number, is overlaid on the right side of the image.

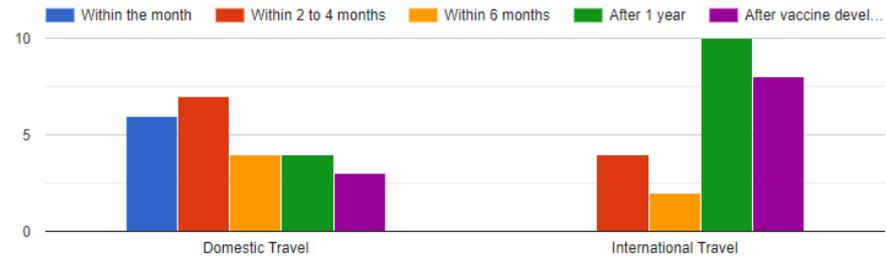
# **5** TRAVEL DURING THE PANDEMIC PERIOD

# How soon do you think you will travel now that the travel restrictions are eased?



## United Kingdom

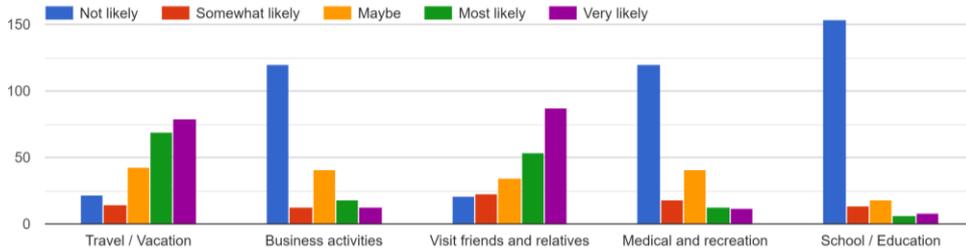
UK: A large majority answered that they will travel inside the UK within the month. However, the most respondents stated that they will travel outside of the UK at least 6 months to a 1 year now that travel restrictions are eased.



## Republic of Ireland

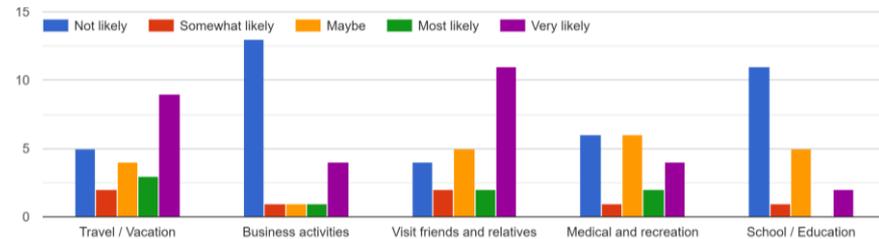
Republic of Ireland: A large majority answered that they will travel inside of Ireland within the next 2 to 4 months. However, the most respondents stated that they will travel outside of Ireland at after 1 year or until a vaccine is developed.

# How likely are you to travel for the following purposes?



## United Kingdom

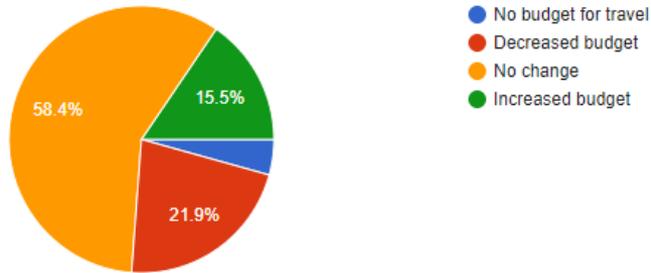
UK: The majority said that they are willing to travel for friends and relatives visit and a vacation, but not for schools, businesses or medical recreation. According to the results, vacation destinations in the Philippines may recover relatively faster while business districts may take a longer time to recover.



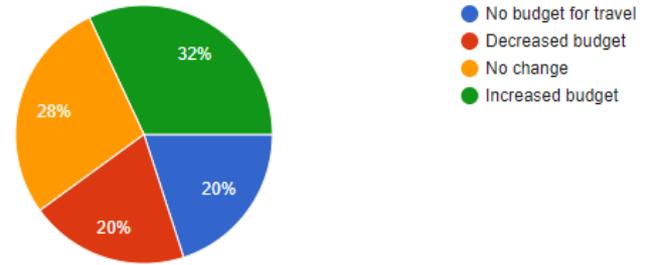
## Republic of Ireland

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# Will COVID-19 change your travel budget?



**United Kingdom**

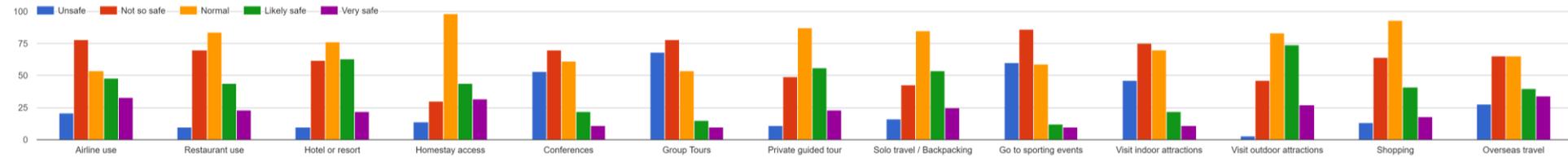


**Republic of Ireland**

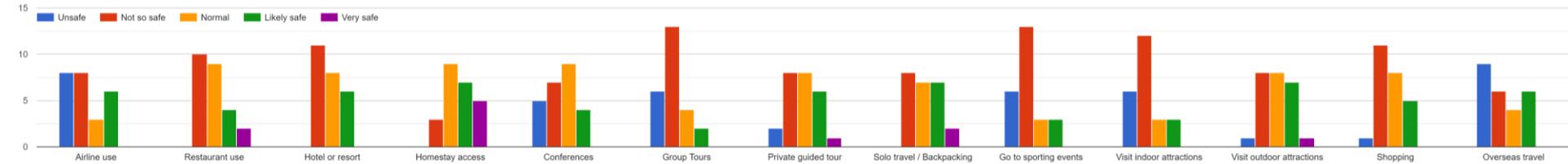
UK: Majority of the respondents stated that they will not change their travel budget due to Covid-19 (58.4%). With 21.9% having to decrease their budget, but surprisingly 15.5% will increase their budget. This can be due to travelers who would have usually traveled over this period – unable to and therefore saving their money for a bigger/longer holiday.

Republic of Ireland: Majority of the respondents stated that they will have an increased budget (32%) With 28% stating no change to their budget. This can be due to travelers who would have usually traveled over this period – unable to and therefore saving their money for a bigger/longer holiday.

# Now that the travel restrictions are eased, how safe would you feel about doing the following activities?



## United Kingdom

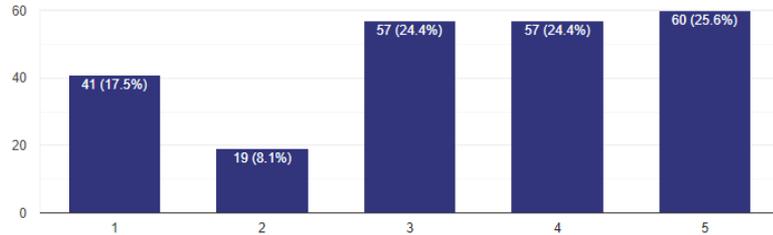


## Republic of Ireland

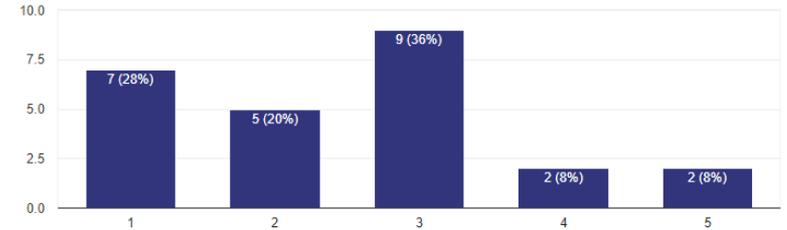
UK: According to the results, most respondents think activities involving many people and indoors are unsafe and risky even though travel restrictions have eased. Many respondents also indicated that they would avoid go to conferences, group tours sporting events, and other indoor events. Thus, once people begin traveling again, individual tours (or small group tours) can be expected to become new trend in travel, where social distancing, washing and disinfecting, masks and health checks are followed.

Republic of Ireland: According to the results, most respondents think activities involving many people and indoors are unsafe and risky even though travel restrictions have eased. Many respondents also indicated that they would avoid going on an airplane for overseas travel, group tours, conferences, sporting events and indoor attractions.

# How likely are you to purchase a current travel product or participate in a promotion?



United Kingdom

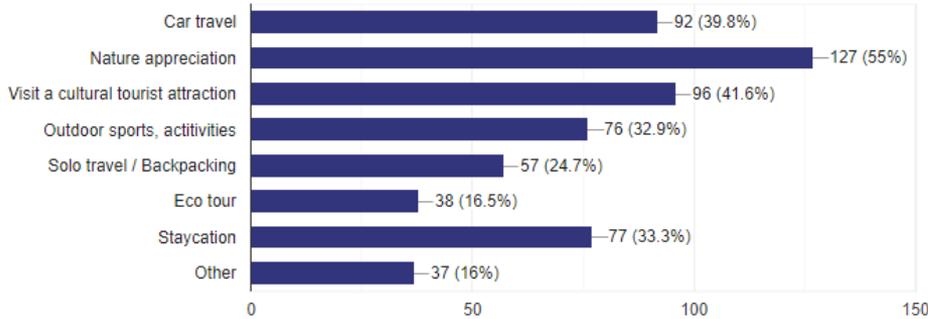


Republic of Ireland

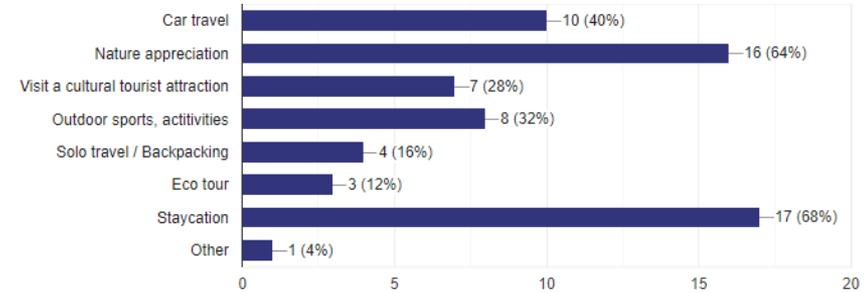
UK: With 1 being 'Not Likely' and 5 being 'Very Likely', 25.6% of respondents answered that they would be very likely to purchase a travel product or participate in a promotion. With half of the respondents (50%) saying that they will purchase a travel product. This means we should put together good packages and promotions to entice this consumer audience to purchase.

Republic of Ireland: There was a higher share of consumers who would not be likely to participate in travel promotions and purchase product (48%) compared with the other end of the scale (16%). This could be due to the borders remaining closed, and government guidelines.

# What activities do you want to participate in now that travel restrictions are eased?



United Kingdom



Republic of Ireland

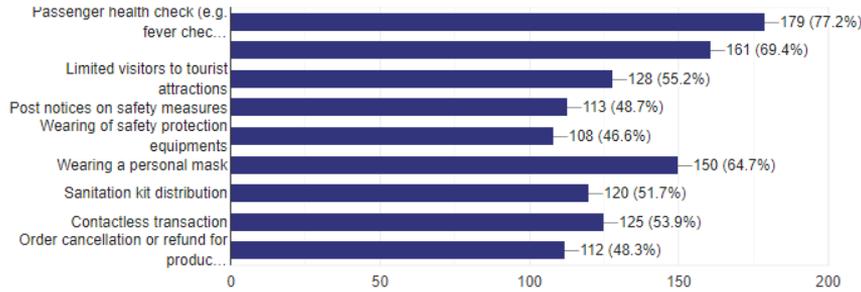
UK: A large proportion of respondents chose nature appreciation (55%) and visiting a cultural tourists attraction (41.6%) for activities they want to do now that the travel restrictions are lifted. Car travel (39.8%) and staycations (33.3%) activities were also selected by many respondents.

Republic of Ireland: A large proportion of respondents chose staycation (68%) and nature appreciation (64%) for activities they want to do now that the travel restrictions are lifted. Car travel (40%) was also selected by many respondents.



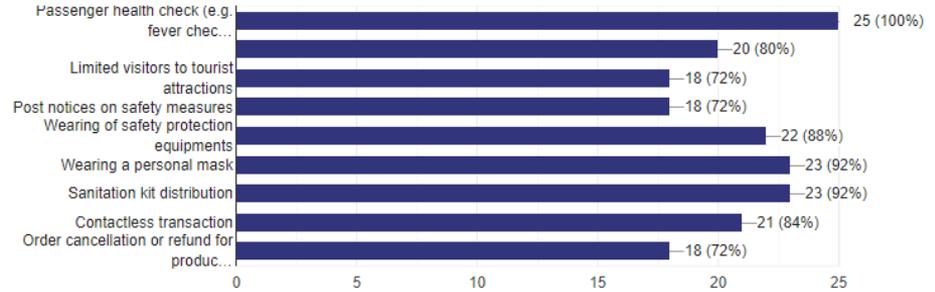
**5** NEW STANDARD IN TRAVEL

# What measures do you think should be taken now that travel is allowed?



## United Kingdom

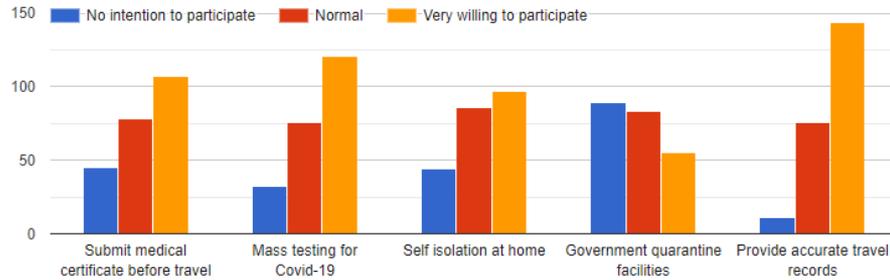
UK: Almost 8 out of 10 respondents (77.2%) have answered that Passenger health checks should be taken by travel related establishments and companies. Followed by thorough prevention and disinfection observed (69.4%) and wearing a personal mask (64.7%).



## Republic of Ireland

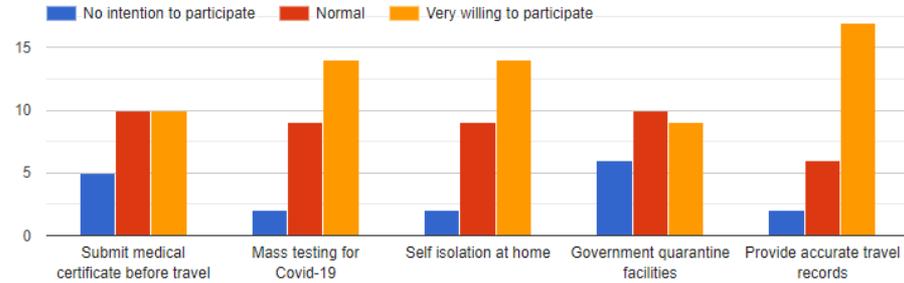
Republic of Ireland: All respondents (100%) have answered that Passenger health checks should be taken by travel related establishments and companies. Followed by thorough sanitation kit distribution (92%) and wearing a personal mask (92%).

# How much are you willing to participate in the following travel policies?



## United Kingdom

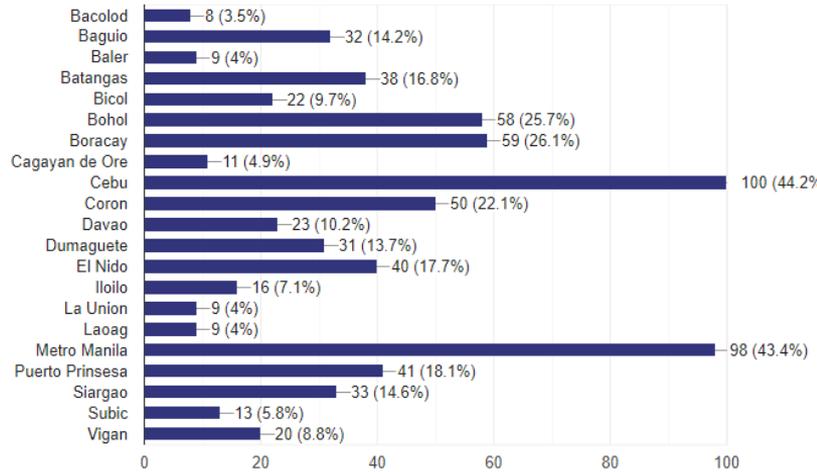
UK: The majority have answered that they are willing to follow most of our example policies to prevent the spread of COVID-19 virus, which include medical certificate submission, COVID-19 test before departure, travel records provision, etc. However, the majority have no intention to participate in Government Quarantine facilities and would rather self isolate at home.



## Republic of Ireland

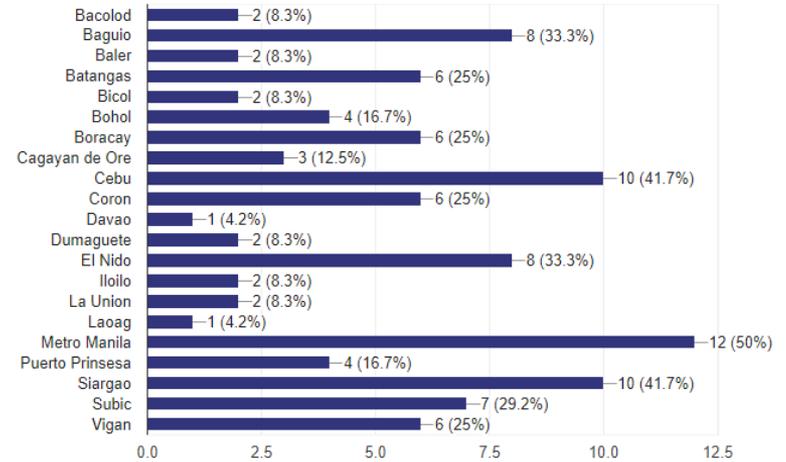
Republic of Ireland: The majority have answered that they are willing to follow most of our example policies to prevent the spread of COVID-19 virus, which include medical certificate submission, COVID-19 test before departure, self & government quarantine, travel records provision, etc

# Where do you want to visit in the Philippines if travel restrictions are lifted?



## United Kingdom

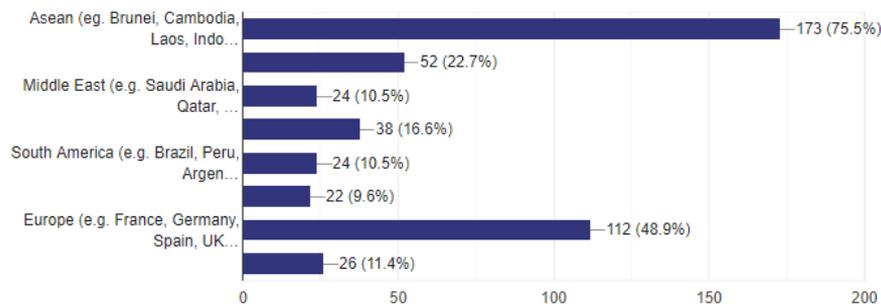
UK: The majority have answered that they would like to visit Cebu (44.2%) followed closely by Metro Manila (43.4%)



## Republic of Ireland

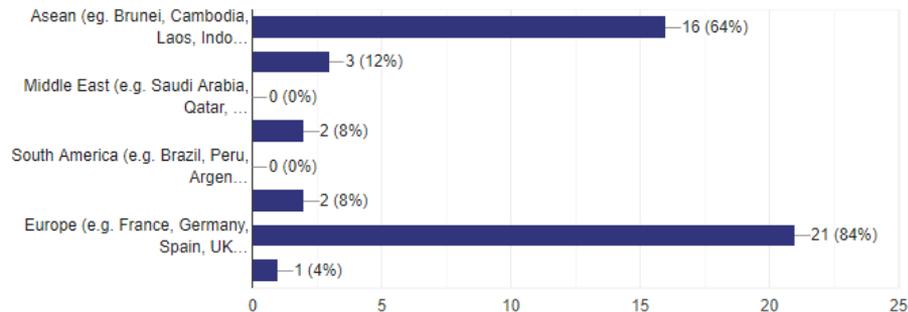
Republic of Ireland: The majority have answered that they would like to visit Metro Manila (50%) followed closely by Cebu and Siargao (41.7%)

# Where are you planning to travel abroad when travel restrictions are fully lifted?



## United Kingdom

UK: The majority have answered that they would like to visit Asia (75.5%) followed by Europe (48.9%)



## Republic of Ireland

Republic of Ireland: The majority have answered that they would like to visit Europe (84%) followed by Asia (64%)