

ASEAN Travel Awareness Survey Report

March 2021



Survey conducted by:

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I Summary

1. Overview
 1. Objectives and outline of survey
 2. Questions
2. Survey Findings
 1. Attributes/travel intent of respondents (Preliminary survey/Actual survey)
 1. Basic attributes: Gender/Age/Annual income etc.
 2. Intent to travel abroad in the future
 3. Mode of Travel abroad/information gathering, important factors for Travel abroad
 4. Mindset on everyday life
 2. Comparison of findings for 10 ASEAN countries (excerpts)
 1. Visit experience rate
 2. Factors found satisfying/unsatisfying after visiting, by country
 3. Images held of each country
3. Towards the future

[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>

II By Country

1. Summary
2. Survey findings
 1. Visit experience YES/NO (details)
 2. [Have visited] Number of visitations, timing
 3. [Have visited] Purpose of visit, with whom
 4. [Have visited] What prompted to chose visitation destination
 5. [Have visited] What was found satisfying
 6. [Have visited] What was found unsatisfying
 7. Images held of the countries
 8. Travel intent (sightseeing tour)
 9. [Travel intent: YES] What respondent wants to do at destination
 10. [Travel intent: YES] With whom respondent wants to go (Accompanying person)
 11. [Travel intent: NO] Reasons not wanting to go
 12. Awareness of 5 tourism resources
 13. Respondent's taste for displayed images



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Objectives/Outline of Survey

- In anticipation of resurgence of desire to travel in with-Corona and post-Corona periods, conduct a survey on travel intent among Japanese travelers (general consumers in their 20's to 60's who are interested in traveling) and obtain data that can be used to promote tourism in the ASEAN member countries.

[10 countries subject for the survey]

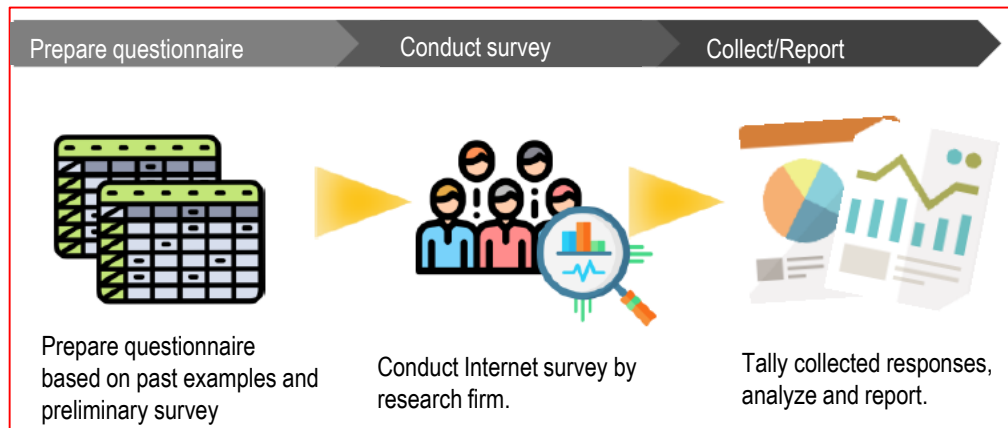
Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, the Philippines, Singapore, Thailand, Viet Nam

Overall Flow

In order to conduct an accurate Internet survey by a company specializing in marketing research, and to investigate the travel intent of "general consumers who are interested in travel", the survey was conducted as follows:

1. Prepare a survey questionnaire based on objectives and subjects of the survey
2. Conduct an internet survey
3. Collect and analyze responded data, report on findings

Overall Flow (Conceptual image)



* Internet survey company

Contracted Micromill, Inc., one of the most experienced marketing research firms and listed on the first section of Tokyo Stock Exchange, to conduct an internet survey.



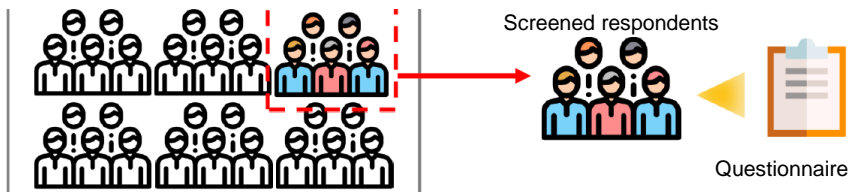
Overview

1. Objectives/Outline of Survey

Survey Method	<ul style="list-style-type: none"> Conduct screening survey utilizing questionnaire panel maintained by the Internet survey firm (Micromill, Inc.) (Preliminary survey)
Survey Period	<ul style="list-style-type: none"> Friday, January 22, 2021 through Saturday, January 23, 2021
Respondents	<ul style="list-style-type: none"> Males and females over 20 years of age, making travel abroad at least once every 3 years and intending to travel abroad in the future. * Ensure to include at least 30 respondents who have visited the respective countries.

Conceptual image of the survey

Panel maintained by survey firm (Survey respondents)



1. Conduct screening against entire panel to extract appropriate respondents.

2. Conduct actual survey against selected respondents

- Screening sample size: 200,000
- Screening questions: 3

- Returned samples: 1,040
- Questions: 18

* This report carries findings of 10,000 samples of 200,000 samples surveyed in the preliminary survey.

Questionnaire respondents allocation

Allocation	Samples	Gender	Age	Overseas travel frequency	Visit experience	Overseas travel future intent	
Brunei Darussalam	31				YES		
Cambodia	31				YES		
Indonesia	31				YES	Have future overseas travel intent	
Lao PDR	31				YES	(Respondents selecting one of the following)	
Malaysia	31				YES		
Myanmar	31				YES		
Philippines	31				YES	(1) Want to travel abroad, regardless of destination, once restrictions are lifted.	
Singapore	31				YES		
Thailand	31				YES		
Viet Nam	31				YES		
M 20's	73	Male	20's	Normal frequency for overseas travel: Once every 3 years or more		(2) Want to travel abroad once travel restrictions to county/region I want to go are lifted.	
M 30's	73		30's				
M 40's	73		40's				
M 50's	73		50's				
M 60+	73		60+				
F 20's	73		Female		20's		(3) Want to travel abroad once COVID-19 vaccine is available and treatments established.
F 30's	73	30's					
F 40's	73	40's					
F 50's	73	50's					
F 60+	73	60+					
Total	1,040						



Overview

2. Questions

No.	Respondent	Question format	Question content (1)	Question content (2)	Purpose of question	
Screening survey (Preliminary survey)	SC1	All SC	SAMT	Usual frequency of traveling (domestic/overseas)	For selecting respondents for actual survey. Qualification: A person making 3 or more Travel abroad per year.	
	SC2	All SC	SAMT	[10 subject countries] Visit experience	For selecting respondents for actual survey. Use to identify Have visited/Never visited. Number of respondents having visited a subject nation to be set a N=30 or more.	
	SC3	All SC	SA	Travel abroad intent	Identify whether respondent still intends to make Travel abroad in the future or not. Persons with intent of making Travel abroad to be survey subjects. *Assuming that some persons with frequent Travel abroad experience may not intend to make Travel abroad in the future	
Conditions for selection for actual survey: Made Travel abroad in the last 3 years in SC1 and intent to make Travel abroad in the future in SC 3.						
Minimum number of respondents required in actual survey: Persons having visited a survey subject nation. N=30 or more for each nation.						
Actual survey	Q1	Persons responding "Have visited" in SC2. (by nation)	MAMT	Detail information on past Travel abroad experience	[By each on 10 countries] Number of visits	Collect information on number of visits to target country
	Q2	Persons responding "Have visited" in SC2. (by nation)	MAMT	Detail information on past Travel abroad experience	[(By each on 10 countries) Timing of visit	Collect information on timing of visiting target country (Provision in case the current conditions of the country may have changes since visitation by respondent.) *Persons with multiple visits to reply on the timing of last visit.
	Q3	Persons responding "Have visited" in SC2. (by nation)	MAMT	Detail information on past Travel abroad experience	[By each on 10 countries] Purpose of visit	Collect information on purpose of visit. *Persons with multiple visits to reply on the purpose of making the last visit.
	Q4	Persons responding "Have visited" in SC2. (by nation)	MAMT	Detail information on past Travel abroad experience	[By each on 10 countries] Accompanying person(s)	Collect information on persons(s) accompanying visitation. *Persons with multiple visits to reply on the last visit.
	Q5	Persons responding "Have visited" in SC2. (by nation)	MAMT	Detail information on past Travel abroad experience	[By each on 10 countries] Reasons for selecting destination	Collect information on reasons for selecting destination of travel. *Persons with multiple visits to reply on the last visit
	Q6	Persons responding "Have visited" in SC2. (by nation)	MAMT	Detail information on past Travel abroad experience	[By each on 10 countries] Satisfying factors	Collect information on factors found to be satisfying in the past visit. *Persons with multiple visits to reply on the last visit.
	Q7	Persons responding "Have visited" in SC2. (by nation)	MAMT	Detail information on past Travel abroad experience	[By each on 10 countries] Unsatisfying factors	Collect information on factors found to be unsatisfying in the past visit. *Persons with multiple visits to reply on the last visit.
	Q8	All	MAMT	Understand awareness of target country	[By each on 10 countries] Image of the country	Collect information on images held by respondents of each country.
	Q9	All	SAMT	Understand awareness of target country	[By each on 10 countries] Visit intent	Collect information on intent to travel to respective countries for sightseeing purpose.
	Q10	Persons selecting "Have intent to visit" in Q9. (by nation)	MAMT	Understand awareness of target country	[By each on 10 countries] What you want to do in the country	Collect information on what travel intending respondents want to do at the destination country.
	Q11	Persons selecting "Have intent to visit" in Q9. (by nation)	MAMT	Understand awareness of target country	[By each on 10 countries] Who will accompany the visit	Collect information on with whom respondents want on travel: Family, friends, etc.
	Q12	Persons selecting "Have intent to visit" in Q9. (by nation)	MAMT	Understand awareness of target country	[By each on 10 countries] Reasons for selecting "No intent to go"	Collect information on reasons for not wanting to visit. Some may respond "I know nothing about the country to begin with." and similar. Use as reference to identify "What prompts someone to want to visit a country overseas?"
	Q13	All	SAMT	Understand awareness of target country	[By each on 10 countries] Tourism resources awareness	Collect information on tourism resources, about 5 for each of the 10 countries.
	Q14	All	SAMT (image)	Understand awareness of target country	[By each on 10 countries] Preferred photo image	Have respondent choose the photo image that he/she likes the best. Show 3 photos for each of the 10 countries.
	Q15	All	MA	Intent on travel in general	Usual method of obtaining travel information	Collect information on travel information contact points.
Q16	All	SA	Intent on travel in general	Mode of travel	Collect information on mode of travel, e.g. FIT • PKG.	
Q17	All	MA/SA	Intent on travel in general	Key factors when selecting travel destination	In view of Covid-19 pandemic and warnings issued on infection prevention measure, collect information on key factors in selecting travel destination countries. Prepare one that asks respondents to list all factors that are important and another that asks for the most important factor.	
Q18	All	MA	Intent on travel in general	Changes in lifestyle/behavior	Collect information on traveler awareness.	

*Question format detail

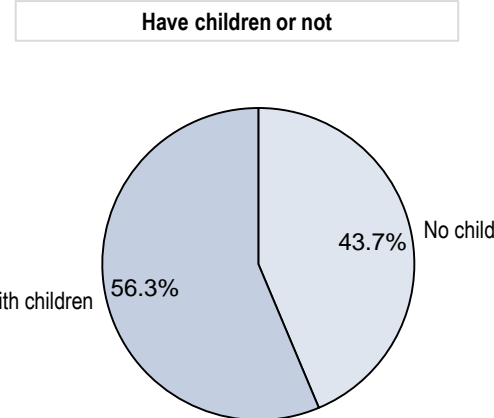
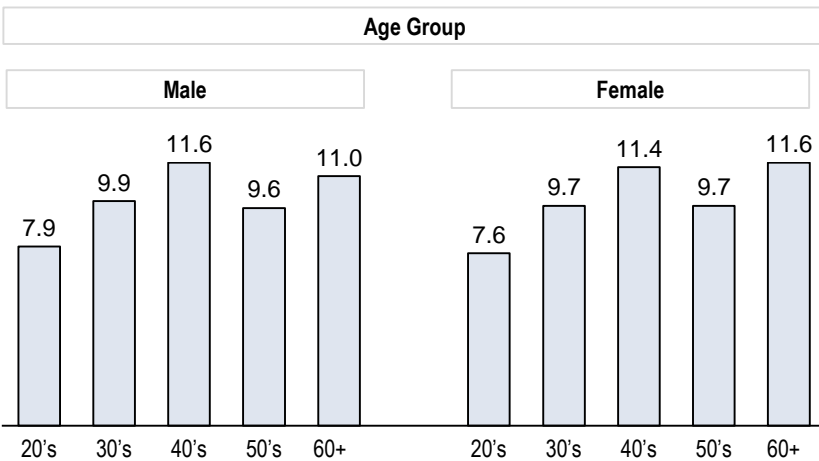
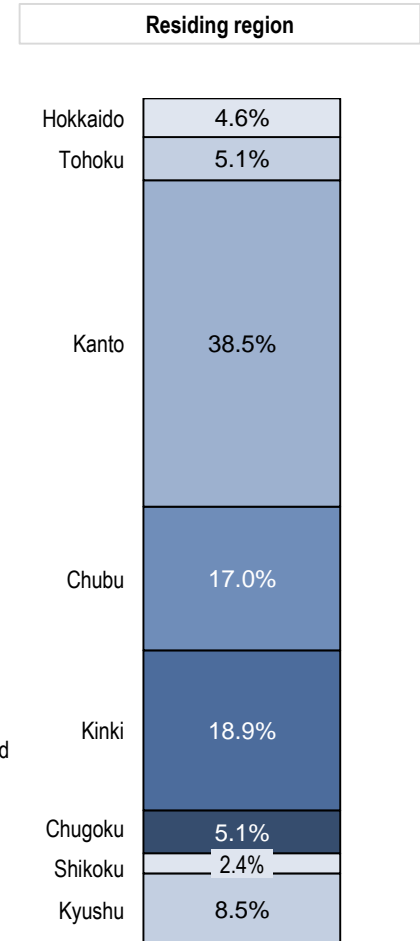
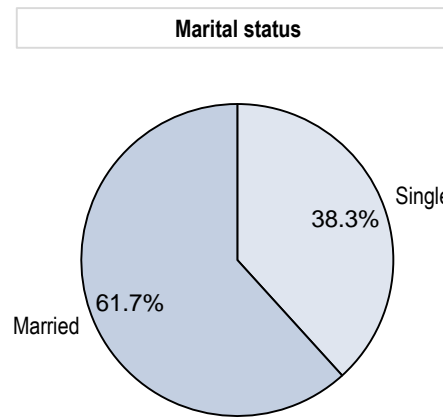
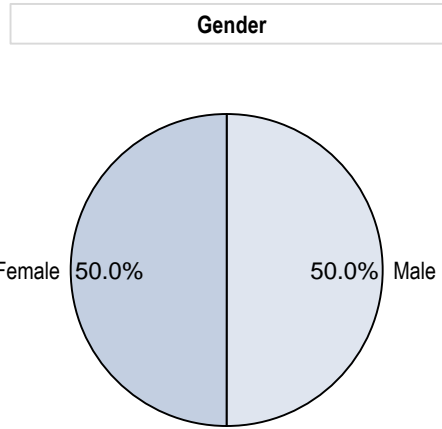
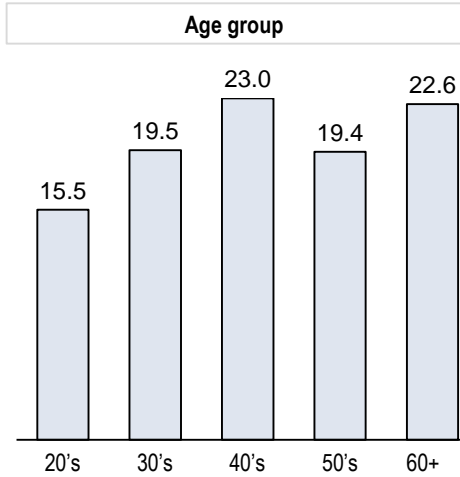
SA : Single answer MA : Multiple answers MT : Matrix format (Table)



Survey Findings > Respondent Attributes /Travel Intent

1. Basic Attributes (Screening Survey)

n=10,000
Unit: %





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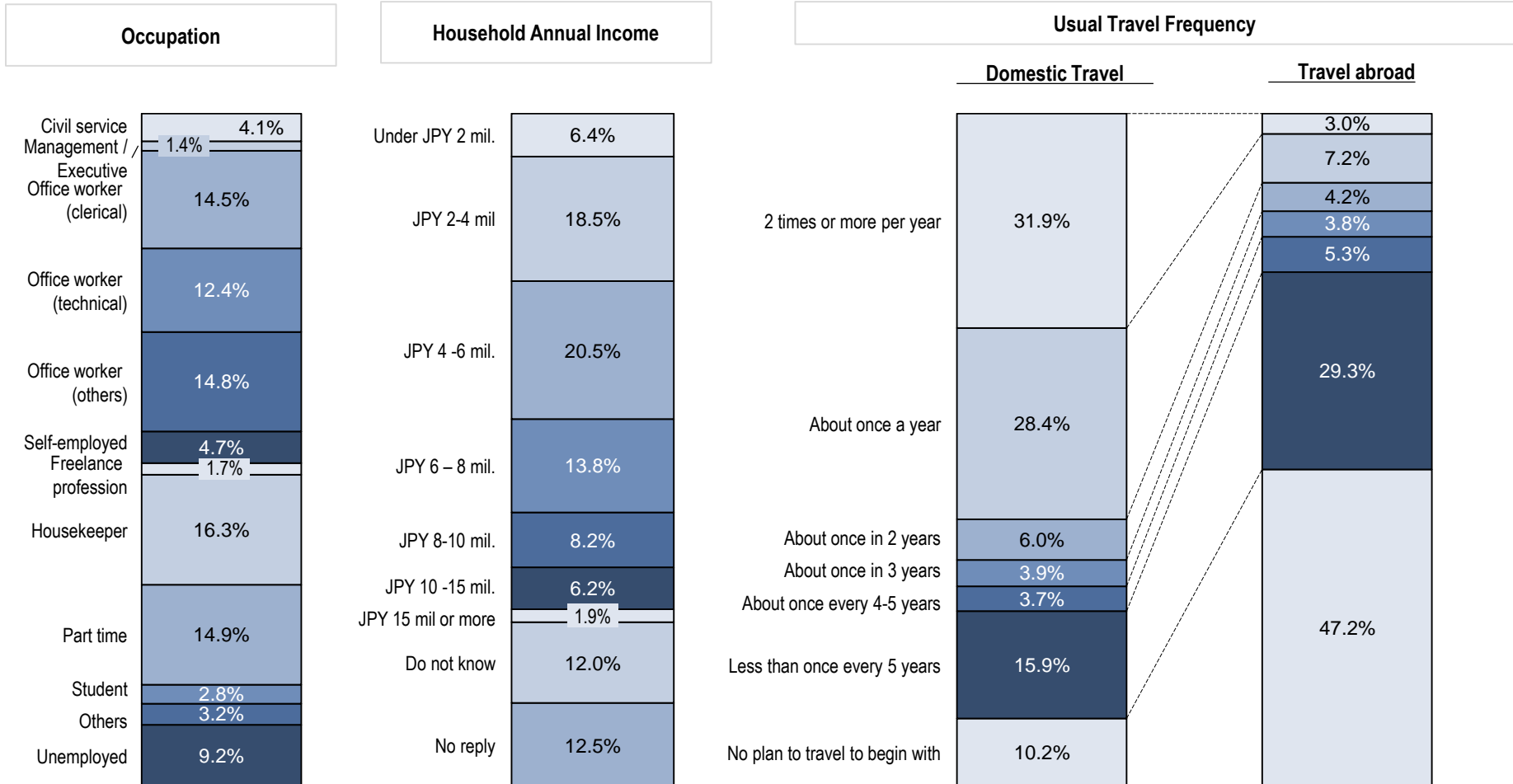
3. Towards the future



Survey Findings > Respondent Attributes/Travel Intent

1. Basic Attributes (Screening Survey)

n = 10,000
Unit: %



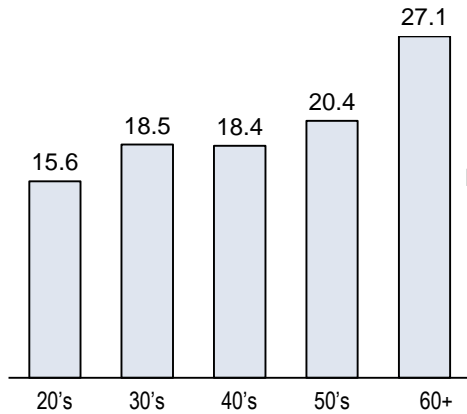


Survey Findings > Respondent Attributes/Travel Intent

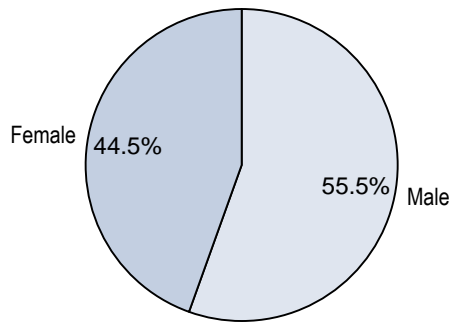
1. Basic Attributes (Actual survey)

n=1,040
Unit: %

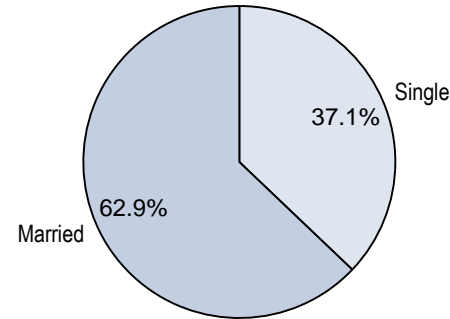
Age Group



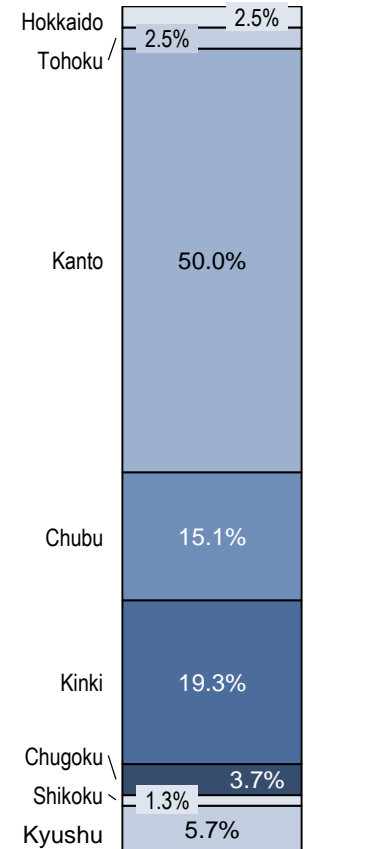
Gender



Marital Status

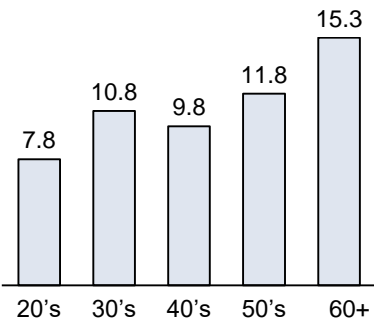


Residing Region

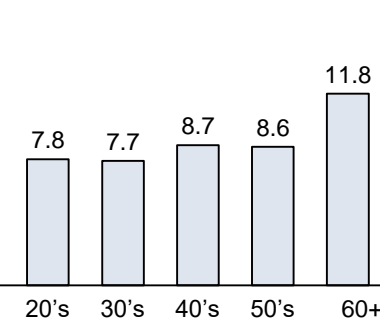


Age Group

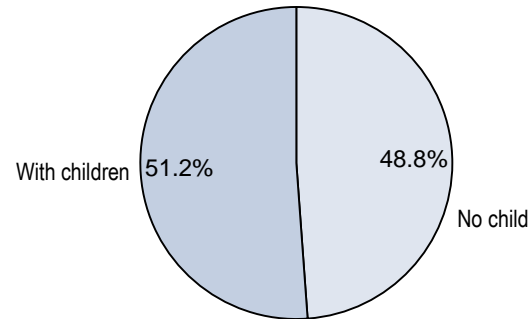
Male



Female



Have children or not



n=1,040
Unit: %



* Qualifying conditions for actual survey respondent: Travel overseas once every 3 years or more. Therefore, travel frequency of respondents must be once every 3 years or more.



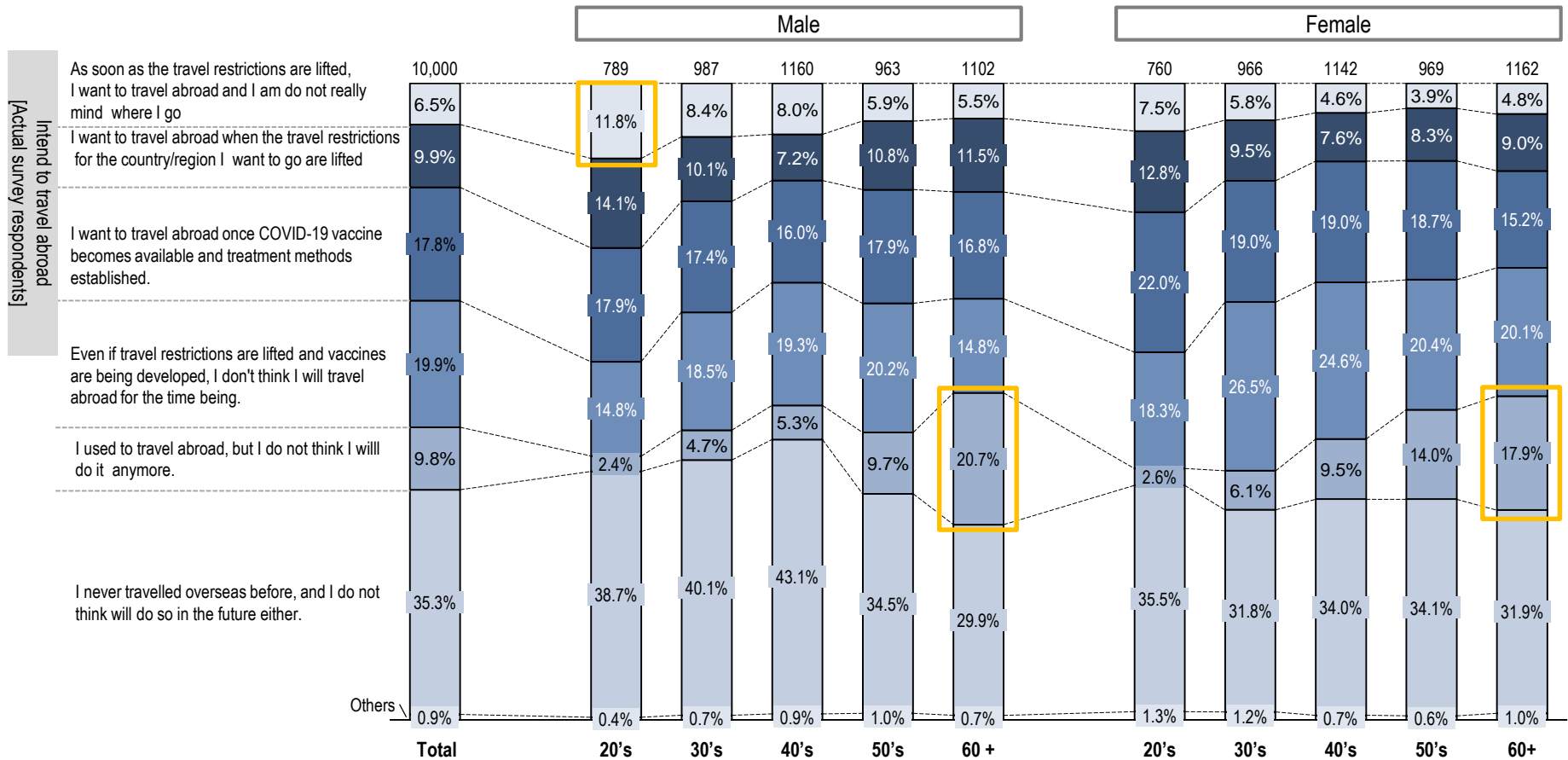
Survey Findings > Respondents Attributes/Travel Intent

2. Intent to Travel Overseas in the Future

- We asked 10,000 persons (person with no intent to travel overseas included), male and female, over 20 years of age whether he/she intends to travel overseas in the future and found that the younger the more positive towards travel abroad. M20's returned the highest for "Want to go right away" (11.8%). This age group is likely to be the first to move when restrictions on travel abroad are lifted. On the other hand, more than 20% of M/F 60+ responded as "Used to make travel abroad before, but I do not think I will make another travel abroad again," (the highest among age groups), indicating that even if restrictions on travel abroad are lifted, the senior segments may not travel abroad as before.

Intent to travel overseas in the future (Screening survey)

Q. Do you want to travel abroad for sightseeing in the future? Please select the answer below that best expresses your current feelings.



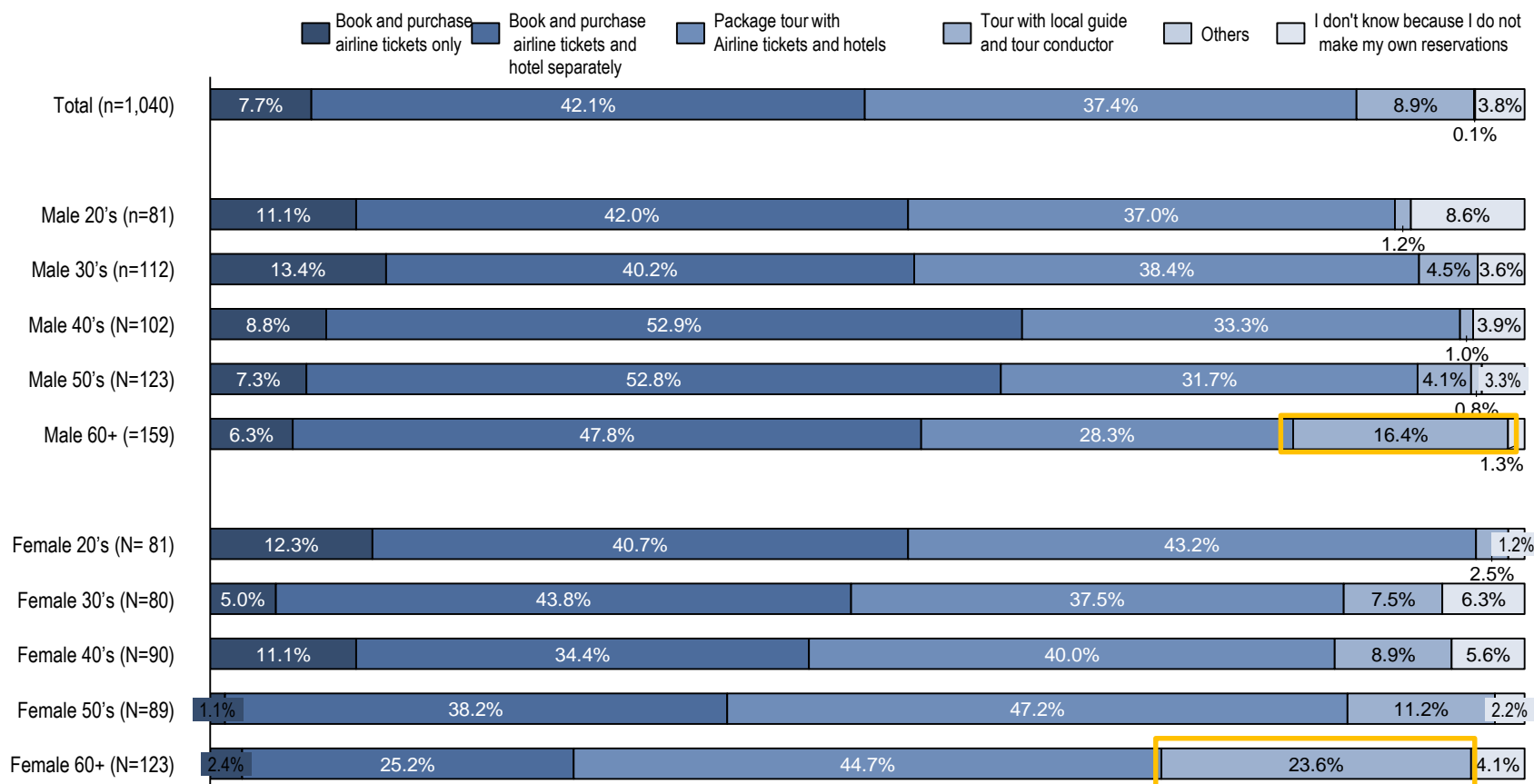


3. Form of Travel Abroad/Information Gathering, Important Factors in making Travel abroad

- We asked respondents qualifying for the actual survey on their normal form of travel abroad. “Book and purchase airline tickets and hotel separately” scored the highest with 42.1%, followed by “Package tour with airline tickets and hotels” with 37.4%. “Tour with local guide and tour conductor” was used more frequently among 60+ and females tended to use this form more than males. More males tended to use “Book and purchase airline tickets only” and “Book and purchase airline tickets and hotel separately” than females.

Frequently used form of travel abroad (Actual survey)

Q. What form of travel do you usually use when you travel abroad? Please only tell us the form you use the most.



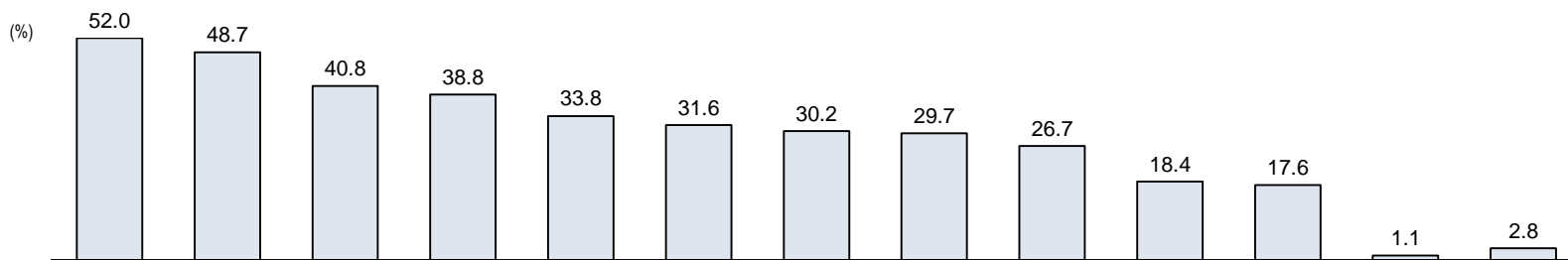


3. Form of Travel Abroad/Information Gathering, Important Factors in making Travel abroad

- We asked respondents in the actual survey how they obtain information on travel abroad. "Travel magazines (including electronic version)" was used most frequently (52.0%), followed by "Online blogs and review sites" (48.7%). Preference varied with gender and age. Among F20's, "Social media" (59.3%) was followed by "Word-of-mouth by family, friends and acquaintances" (53.1%), while "Travel agency website" and Newspaper articles and advertisement" were more frequently used among MF60+ compared to other age groups, indicating that it is advisable to employ PR media appropriate to each age group.

Gathering Information on Travel Abroad (Actual survey)

Q. How do you normally get information on overseas travel? Please give all applicable answers.



If n > 30
 [Difference in rating]
 Total -10 points
 Total +5 points
 Total -5 points
 Total -10 points

Gender / Age	n=	Information Gathering Methods (%)												
		Total	Travel magazines (including electronic version)	Online blogs and review sites	Travel agency website	Word-of-mouth by family, friends and acquaintances	Travel exclusive online media and travel information sites (TABLABO, TABIZINE, CREA Traveller web etc.	Tourism websites distributed by the locality, such as the country's national tourism organization	TV and radio	Travel features in general magazines (including electronic versions)	Social media, such as Facebook, Twitter, Instagram	Info provider of travel agency	Newspaper articles and advertisements	Others
Total	(1,040)	52.0	48.7	40.8	38.8	33.8	31.6	30.2	29.7	26.7	18.4	17.6	1.1	2.8
Gender														
Male	(577)	51.3	47.0	38.5	31.7	37.8	34.7	29.6	28.1	25.8	17.3	20.6	0.9	3.6
Female	(463)	52.9	50.8	43.6	47.5	28.7	27.9	30.9	31.7	27.9	19.7	13.8	1.3	1.7
Age														
20's	(162)	43.8	37.0	35.2	43.2	35.2	20.4	18.5	25.3	46.3	21.0	14.2	0.0	2.5
30's	(192)	51.6	49.5	32.8	42.7	38.0	23.4	22.9	26.0	37.5	19.8	12.0	2.1	4.7
40's	(192)	51.6	56.8	40.1	39.1	35.4	32.3	32.8	30.7	28.1	13.0	14.6	0.0	3.1
50's	(212)	53.3	56.1	38.7	37.3	36.3	43.4	34.0	37.3	23.1	15.6	17.0	0.9	0.9
60 and over	(282)	56.4	43.6	51.4	34.4	27.0	34.4	37.2	28.4	9.9	21.6	25.9	1.8	2.8
Gender / Age														
M 20's	(81)	38.3	27.2	32.1	33.3	44.4	27.2	19.8	21.0	33.3	19.8	19.8	0.0	3.7
M 30's	(112)	51.8	46.4	34.8	33.0	43.8	26.8	26.8	30.4	33.0	16.1	16.1	1.8	5.4
M 40's	(102)	52.0	54.9	37.3	39.2	37.3	32.4	32.4	29.4	36.3	14.7	13.7	0.0	5.9
M 50's	(123)	51.2	55.3	32.5	29.3	35.0	48.0	30.9	33.3	24.4	15.4	22.0	0.8	1.6
M 60+	(159)	57.2	45.9	49.7	27.0	32.7	35.2	34.0	25.2	11.3	20.1	27.7	1.3	2.5
F 20's	(81)	49.4	46.9	38.3	53.1	25.9	13.6	17.3	29.6	59.3	22.2	8.6	0.0	1.2
F 30's	(80)	51.3	53.8	30.0	56.3	30.0	18.8	17.5	20.0	43.8	25.0	6.3	2.5	3.8
F 40's	(90)	51.1	58.9	43.3	38.9	33.3	32.2	33.3	32.2	18.9	11.1	15.6	0.0	0.0
F 50's	(89)	56.2	57.3	47.2	48.3	38.2	37.1	38.2	42.7	21.3	15.7	10.1	1.1	0.0
F 60+	(123)	55.3	40.7	53.7	43.9	19.5	33.3	41.5	32.5	8.1	23.6	23.6	2.4	3.3



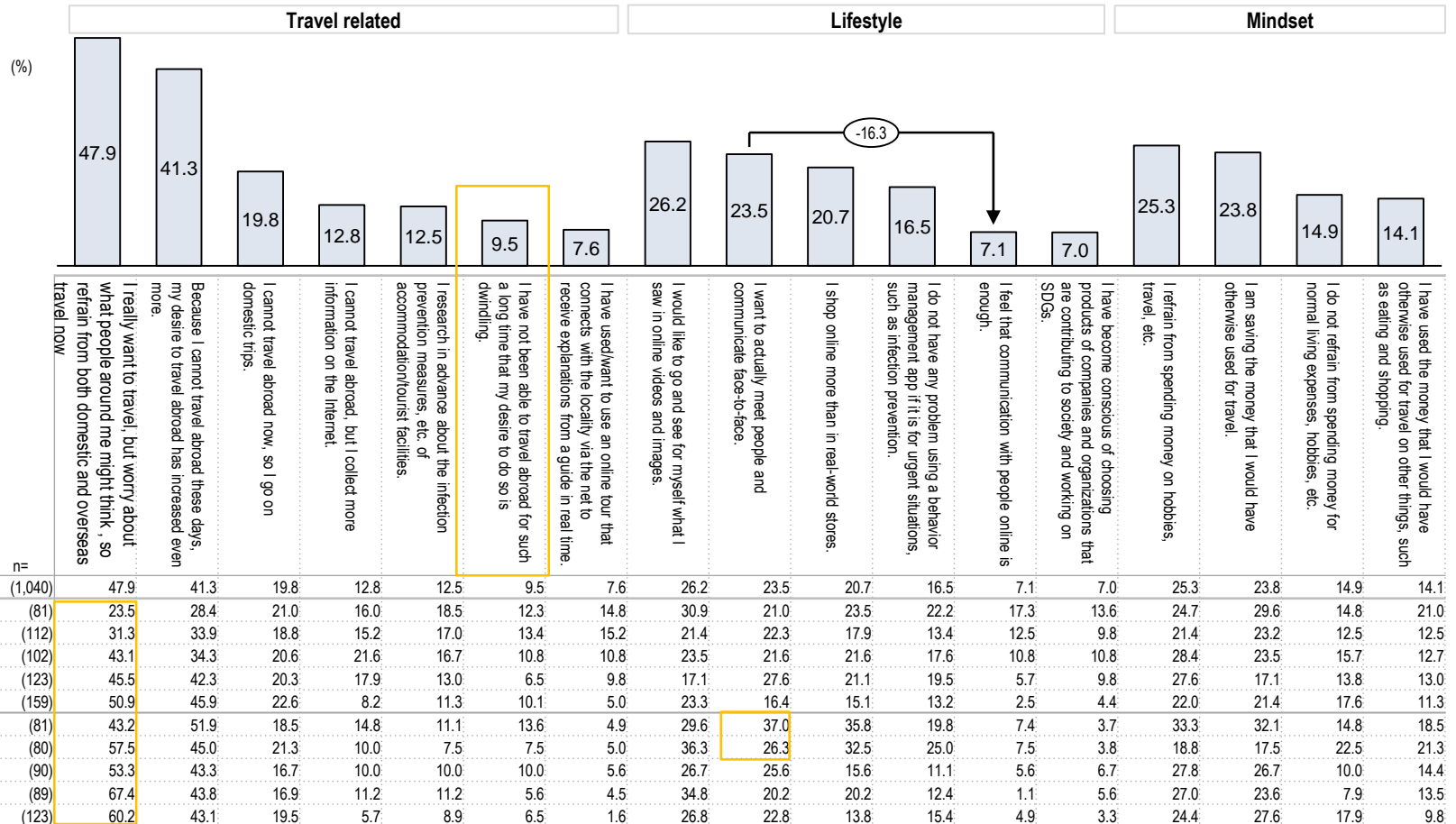
Survey Findings > Respondent Attributes > Travel Intent

4. Mindset on Everyday Life

- We asked respondents on their current feelings and behavior. “I really want to travel, but worry about what people around me might think, so refrain from both domestic and overseas travel now.” scored the highest with 47.9% and detail breakdown showed that the older the respondents, higher the scoring. Although respondents may be refraining from making travels abroad for the time being, M 20’s and F20’s returned high scorings for “Collecting information on the Internet”. However, 9.5% of the respondents chose “Desire to travel abroad is dwindling”, an indication that although some may still be harboring desire to travel abroad, their desire to do so may dwindle depending on things develop in the future. Therefore, it can be said that it is important to maintain connection by continuing to communicate information even during period when people are refraining from travelling. In addition, it was notable that more than 2 times more respondents chose “I actually want to meet people and communicate face-to-face” over respondents preferring “I feel that communication with people online is enough.”

Current feelings and lifestyle/behavior (Actual survey)

Q. Please tell us about your personal feelings. Have you changed your behavior or feelings lately? Please give all answers that best express your feelings and actions right now.



Respondents: Travel overseas at least once every 3 years and intends to travel overseas in the future



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2. Comparison of findings for 10 ASEAN countries (excerpts)

1. Visit experience rate
2. Factors found satisfying/unsatisfying after visiting, by country
3. Images held of each country

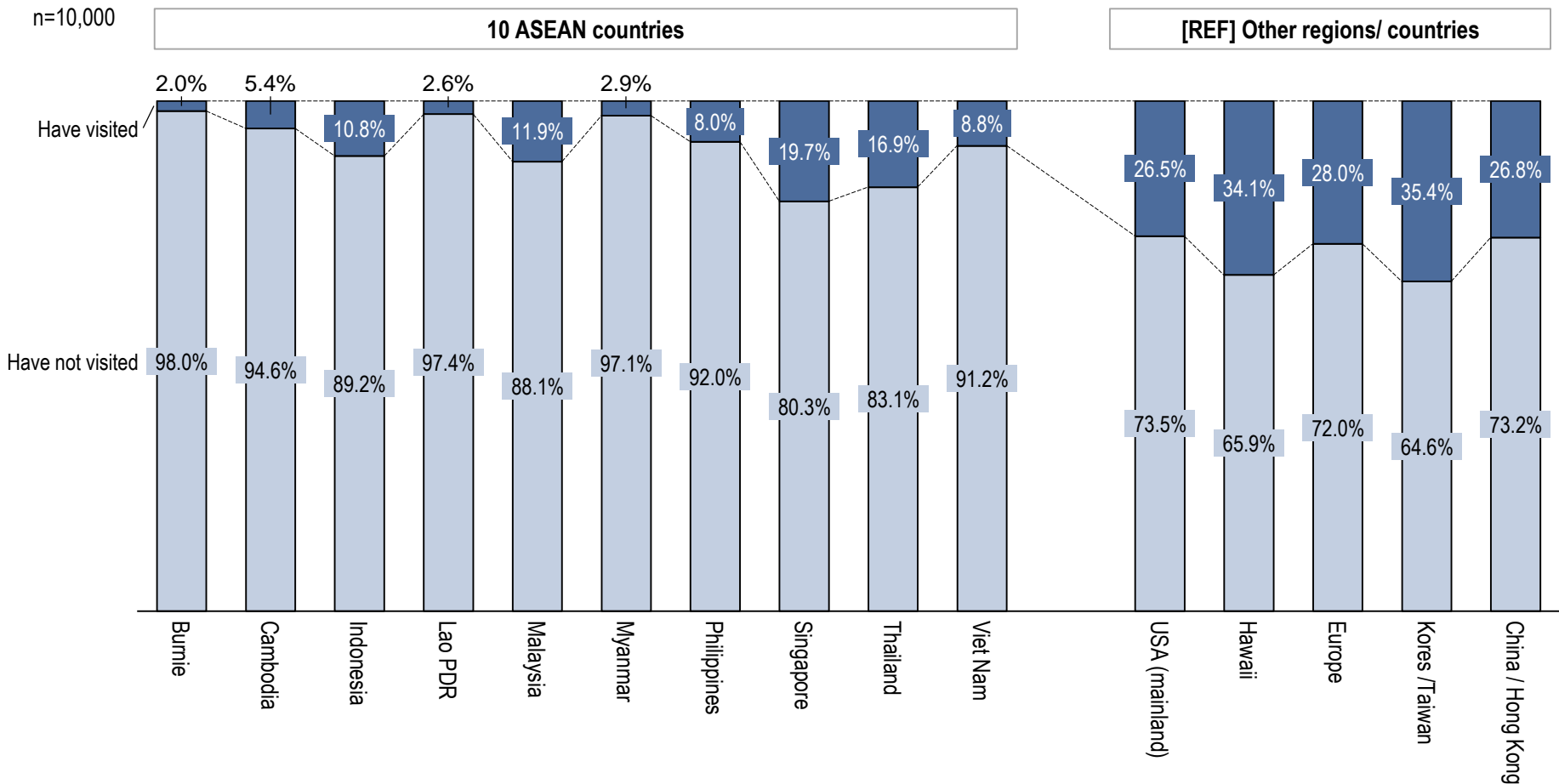
3. Towards the future



1. Visit Experience for the 10 ASEAN Countries

- We asked 10,000 people, males and females, over 20 years of age throughout Japan on their experience of visiting the 10 ASEAN countries and other regions/countries and found that Singapore scored the highest of the 10 ASEAN countries with 19.7%, followed by Thailand (16.9%) and Malaysia (11.9%).

Visitation experience of respective countries (Screening survey)

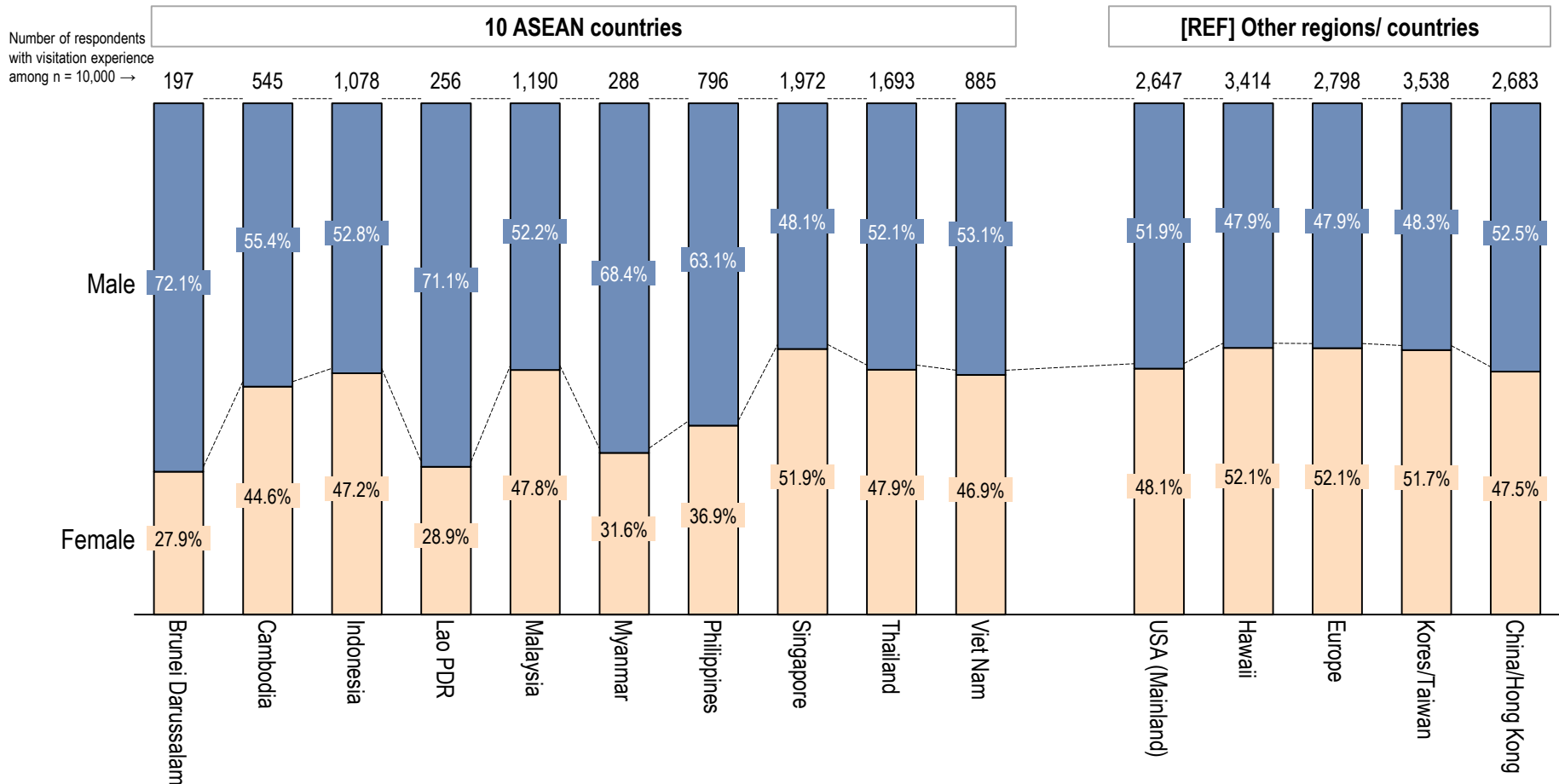




1. Visit Experience for the 10 ASEAN Countries

- Examining people who responded as having visited the 10 ASEAN countries by gender showed that, with the exception for Singapore, more males than females responded YES. Males accounted for more than 60% for Brunei Darussalam, Lao PDR, Myanmar and the Philippines, significant difference. For regions/countries other than the 10 ASEAN countries, more females responded YES for Hawaii, Europe and Korea/Taiwan

Visit experience for respective countries / gender ratio (Screening survey)





Survey Findings > Summary

2. Findings for the 10 Countries: Satisfying Factors, Images of Country, etc.

- We asked respondents who have visited the respective countries on what they found satisfying and unsatisfying. “Scenery/atmosphere”, “Food/cuisines”, “Sightseeing/historical sites” scored well as satisfying factors. These 3 factors are also among the top choices in the preceding question: “Important factors for travel abroad”. Therefore, these factors can be appealed aggressively in advertising. “Safe and good public security” ranked high.
- As for factors found unsatisfying, “Nothing in particular” ranked among the top 3 for every country. On the other hand, “Public security” was ranked high in many countries. The survey indicated that “Safe and good public security” is top priority when considering overseas travel. Therefore, it appears that measures to ease concerns that travelers hold for public security abroad will be required.

Satisfying factors / Unsatisfying factors Listing for 10 countries (Top 3)

		Brunei Darussalam	Cambodia	Indonesia	Lao PDR	Malaysia	Myanmar	Philippines	Singapore	Thailand	Viet Nam
Number of visitors (Respondents)		78	222	350	121	381	129	293	561	539	364
Satisfying factor [Visitors]	1st	Public security	Sightseeing / historical sites	Natural scenery	History / Culture	Scenery / Atmosphere	History / Culture	Cost	Scenery / Atmosphere	Food / Cuisines	Food / Cuisines
	2nd	Food / Cuisines	History / Culture	Scenery / Atmosphere	Sightseeing / historical sites	Natural scenery	Scenery / Atmosphere	Natural scenery	Public security	Scenery / Atmosphere	Scenery / Atmosphere
	3rd	Sightseeing / historical sites	Scenery / Atmosphere	Food / Cuisines	Natural scenery	Food / Cuisines	Sightseeing / historical sites	Scenery / Atmosphere	Accommodation	Sightseeing / historical sites	Sightseeing / historical sites
Unsatisfying factor [Visitors]	1st	Food / Cuisine	Nothing in particular	Nothing in particular	Nothing in particular	Nothing in particular	Nothing in particular	Public security	Nothing in particular	Nothing in particular	Nothing in particular
	2nd	Interaction /contact with locals	Public security	Public security	Access to destination	Souvenirs and products	Public security	Nothing in particular	Cost	Public security	Public security
	3rd	Nothing in particular	Food / Cuisines	Food / Cuisines	Interaction /contact with locals	Public security	Interaction /contact with locals	Food / Cuisine	Experience/ activities at destination	Food / Cuisine	Experience/ activities at destination



Survey Findings > Summary

2. Findings for the 10 Countries: Satisfying factors, Images of Country, etc.

- We asked respondents in the actual survey of images they hold of the respective countries. Cultural history and beautiful sceneries of the respective countries, e.g. “Beautiful nature/scenery”, “History /Culture”, “Sightseeing /historical sites” etc., appear to be have disseminated among respondents. Yet, “Hold no particular image” ranked into the Top 5 for 7 countries. Therefore, there is a need to further communicate attractions of each country and ensure that travelers receive such information.

Images of the respective countries Listing for 10 ASEAS countries (Top 5)

	Brunei Darussalam	Cambodia	Indonesia	Lao PDR	Malaysia	Myanmar	Philippines	Singapore	Thailand	Viet Nam
1st	Do not have any impression / Do not know	Has attractive sightseeing spots such as places of interest and historical sites	Beautiful nature and scenery	Do not have any impression / Do not know	Beautiful nature and scenery	Do not have any impression / Do not know	Has charming beach resorts (Tied for 1 st and 2 nd)	Clean cities	Rich in history and culture	Delicious food
2nd	Beautiful nature and scenery	Rich in history and culture	Has charming beach resorts	Beautiful nature and scenery	Do not have any impression / Do not know	Rich in history and culture	Do not have any impression / Do not know ((Tied for 1 st and 2 nd)	Safe and good public security	Delicious food	Rich in history and culture
3rd	Rich in history and culture	Do not have any impression / Do not know	Rich in history and culture	Rich in history and culture	Rich in history and culture	Beautiful nature and scenery	Beautiful nature and scenery	Beautiful cityscapes	Has attractive sightseeing spots such as places of interest and historical sites	Has attractive sightseeing spots such as places of interest and historical sites
4th	Can relax	Beautiful nature and scenery	Has attractive sightseeing spots such as places of interest and historical sites	Can relax	Can relax	Has attractive sightseeing spots such as places of interest and historical sites	Lively	Refined atmosphere	Beautiful nature and scenery	Beautiful nature and scenery
5th	Has unrivaled charming places	Has festivals and traditional performing arts	Do not have any impression / Do not know	Has attractive sightseeing spots such as places of interest and historical sites	Delicious food	Has festivals and traditional performing arts	Can relax	Feels luxurious	Has charming beach resorts	Can enjoy shopping for misc. goods unique to the country



I Summary

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[Looking ahead on travel abroad in the future]

- We asked respondents on their feelings towards future travels abroad in this survey and found that the younger, the stronger the desire. 6.5% of the entire respondents responded that “As soon as the travel restrictions are lifted, I want to travel abroad and I do not really mind where I go.” with 11.8% of male respondents responding so. It appears that the long term of travel restrictions under COVID-19 pandemic is **fueling latent desire to travel abroad regardless of destination or purpose**. 20’s and 30’s age groups, segments likely to be the first to make a move once restrictions on sightseeing travels abroad are lifted, are currently refraining from travelling, yet many of them responded that “Desire to travel abroad is rising and started to look up overseas information”, indicating that communicating information to these segments now to imprint awareness as potential destination for overseas travel will prove to be very beneficial.
 - Objective of travelers is “to just travel overseas”. Therefore, the sooner travel restrictions are lifted and tourist from abroad accepted, higher the probability than before for them to **select countries or regions they would not have considered previously for being perceived as “niche” locations**.
- On the other hand, an unignorable proportion of respondents, about 20% of male 60+ and female 60+ segments, responded as “Used to travel abroad before, but do not think I will do so anymore”, indicating that **behavior among the senior segments may turn out to be different than before after overseas travel restrictions are lifted**. Countries and regions that have targeted the senior segments may need to consider implementing alternative measures to draw the senior segments.
- As for key factors in oversea travel, **response rate to safety and security of travel concerns, such as public safety/security and infectious disease prevention measures, tended to be high among females**. It was verified in this survey of the respective countries that, **with the exception for Singapore, males returned higher visit experience rate and tourism resource awareness rate than females**. If the ASEAN countries intend to target female segments after travel restrictions are lifted, communicating accurate information related to safety/security and infectious disease prevention measures, utilizing female segment targeted advertisements, media and means, will be more critical than before.
 - Normal means for collecting overseas travel related information among females 20’s are “Social media” (59.3%) and “Word-of-mouth from family, friends and acquaintances (53.1%)”. Male/female 60+ segments tend to rely more on “Travel agency website” and “Newspaper articles and advertisements” compared to other age groups.
 - In deploying future overseas travel promotion, it will be important for each county to take into account images held by potential visitors and factors found to be unsatisfying and to **communicate measures that compensate weak points, as well as providing accurate information on the locality. Success will depend on how well concerns held by potential visitors can be alleviated**.
- Prolonged movement restrictions and self-restraint imposed by COVID-19 pandemic brought about shifts in paradigm, i.e. remote work and online conference becoming more prevalent. Digital tools are commonly used than before. We asked respondents harboring intent to make oversea travel in the future of their current feelings and behavior under such social conditions and found that more than twice as many respondents responded as “Prefer to communicate face-to-face” over “Online communication is sufficient” even after proliferation of digital tools. This trend was particularly high among female respondents. In addition, more than 25% responded as “I like to go and see for myself what I saw in online videos and images”, indicating the **desire to move about and travel to “See with own eyes at the locality” does not dwindle** even if information are available from videos and photo images. However, it should be noted that **9.5% responded as “Desire to travel overseas is dwindling”, indicating that although some may still be harboring desire to go at this point in time, such desire may dwindle depending how thing develop in the future**. It can be said that it is important to maintain communication with travelers by disseminating information so as not to sever connection with them and sustain desire to travel among travelers.