

Palawan Local Tourism

Province-wide Online Survey
November 5-13, 2020



November 2020

EXECUTIVE SUMMARY

The community quarantine imposed all over the Philippines since March 2020 due to the COVID-19 pandemic has affected Filipinos' way of living and livelihood. Dependent on the constant movement of people across boundaries, the tourism sector is one of the most affected industries due to travel restrictions and quarantine guidelines. Since most parts of the country have been downgraded to the 2 lowest quarantine classifications, the national government has been asking local government units (LGUs), particularly those where famous tourist destinations are situated, to reopen their locales to domestic tourism, and encouraging Filipinos to travel again to revive the economy.

Palawan, one of the top tourist destinations, remains largely closed to domestic tourism.¹ However, the provincial tourism stakeholders initiated the 'Palawan Muna' campaign to encourage local tourism among Palaweños and bring them closer to the province's famous destinations, and also to boost the tourism sector in the province since travel restriction for domestic tourists is still in place.

This province-wide online survey conducted from November 5 to 13, 2020 finds the following key insights:

- 56% of respondents have NOT traveled as tourists in Palawan even before the pandemic.
- Palaweño respondents have a limited spending capacity to travel, as majority claimed that they only spent Php5,000 or below in their travels as tourists in the province before (52%) and during (60.1%) the pandemic
- Only 2 in every 10 respondents (19.8%) have already traveled as tourists in Palawan during the pandemic.
- Low number of COVID cases & strict implementation of face mask & face shield policy are the top reasons why they are comfortable traveling.
- Respondents who haven't traveled as tourists in Palawan amidst the pandemic (80.2%) point to lack of financial capacity to travel & increased likelihood of getting COVID-19 as top reasons why they are uncomfortable to travel.
- 58% of those that haven't traveled as tourists in Palawan yet amidst the pandemic do not have any plan to travel in the next few weeks or months.
- 57% of respondents are not aware of the Palawan Muna campaign. However, more than ⅔ of the respondents (70%) agree with the campaign's objective
- 7 in every 10 respondents claim to have been enticed to travel as tourists within the province after learning about the Palawan Muna campaign. 54% of those who were enticed to travel intend to travel by next year at the earliest.
- 54% are not in favor of reopening Palawan to domestic tourists.
- 65% are not in favor of reopening Palawan to foreign tourists.

¹ As of this writing, Palawan plans to slowly [reopen](#) domestic tourism in the first week of December.

BACKGROUND

PH tourism industry is one of the hardest hit sectors due to the lockdowns and travel restrictions brought about by the COVID-19 pandemic. With the easing of community quarantine classifications in many parts of the country and with Palawan now under Modified General Community Quarantine (the lowest risk classification), Filipinos are being encouraged to go out and visit local destinations in their general area.

In Palawan, the Palawan Tourism Council (PTC), in partnership with the provincial tourism office, launched 'Palawan Muna' last September, a campaign that aims to boost local tourism in the province among Palaweños. At the time when this online survey was launched, Palawan saw its COVID-19 cases increase from two to 16 during the week of November 2-8, with 12 reported from Mangsee Island in Balabac and one each from Puerto Princesa City and El Nido town. Two of the 14 new cases are classified as "local transmission" cases.

In view of these, this study sought to fight out how Palaweños feel about local tourism within the province, and how willing they are to reopen the province for tourists from other parts of the country.

OBJECTIVES

1. To determine Palaweños' sentiments regarding local tourism in the province under MGCQ
2. To gauge Palaweños' willingness to travel within Palawan amidst the pandemic
3. To know Palaweños' perceptions towards plans to reopen the province for domestic tourism
4. To gauge the awareness of Palaweños regarding the "Palawan Muna" campaign of the provincial tourism office

METHODOLOGY

This study is primarily a descriptive study that aims to find out the sentiments of Palaweños towards engaging in local tourism amidst the COVID-19 pandemic and the Palawan Muna initiative.

The online survey (hosted on SurveyMonkey) was published on Facebook at noon of November 5, 2020 (Thursday) in two (2) posts: one in Filipino and another in English. Both posts on Facebook were boosted for audiences in the whole province of Palawan, with ages 18 years old and above.

The online survey form is mainly written in Filipino, with English translations included in every question.

The form was closed at 11:59PM of November 13, 2020 (Friday). The responses were checked and validated. Incomplete survey responses and complete responses with invalid information (e.g., contact information, location) have been removed from the data set prior to data processing and reporting.

RESULTS

This online survey, conducted from November 5 to 13, 2020, reached and asked 1,767 respondents from all over Palawan questions about their local tourism habits, awareness of the local tourism campaign initiated by the provincial government, and their stance on other topics related to Palawan tourism.

This section summarizes the key insights from the survey, the detailed findings of which may be found in the Appendix.

Respondent Profiles

Sex

Of the 1,767 respondents that answered the survey, the majority were female (62.2%). This male-female ratio is skewed compared to that of the combined population of Palawan and Puerto Princesa City based on the 2015 Census of Population and the July 2020 Projected Mid-year Population by the PH Statistics Authority.

Age

Half of the respondents (52.85%) are aged between 19-27 years old. This is somehow expected since the survey was conducted and distributed online and will likely reach the younger segment of the population more than the others, given that the former is more accustomed to digital technology by virtue of their upbringing in the computer age.

Educational Attainment

3 in every 4 respondents (see *Chart 1*) reached tertiary education -- with college graduates (40.6%) leading the group, followed by college undergraduates (34.6%).

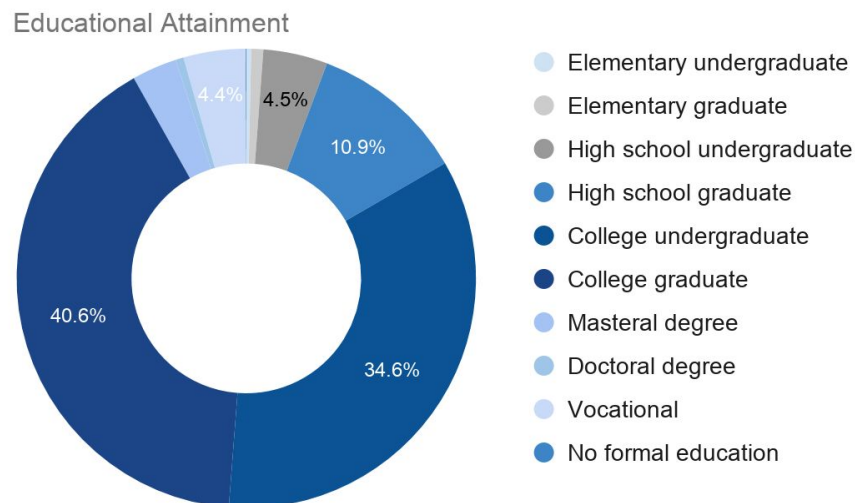


Chart 1. Respondents' reported educational attainment

Geographic distribution

Over half of the respondents of this online survey are from Puerto Princesa City. The rest are distributed among the localities within the purview of the provincial government, with the municipalities of Narra and Coron having the highest number of respondents (see *Table 1*).

Municipality	Count	%
Puerto Princesa City	953	53.93%
Narra	91	5.15%
Coron	85	4.81%
El Nido	76	4.30%
Bataraza	70	3.96%
Brooke's Point	70	3.96%
San Vicente	68	3.85%
Taytay	58	3.28%
Aborlan	53	3.00%
Roxas	53	3.00%
Sofronio Española	40	2.26%
Busuanga	37	2.09%
Quezon	32	1.81%
Rizal	24	1.36%
Culion	13	0.74%
Balabac	11	0.62%
Cuyo	10	0.57%
Dumaran	7	0.40%
Araceli	6	0.34%
Agutaya	5	0.28%
Linapacan	3	0.17%
Cagayancillo	1	0.06%
Magsaysay	1	0.06%
Kalayaan	0	0.00%
Total	1767	100.00%

Table 1. Distribution of respondents from different localities of Palawan

Monthly Income

Five out of 10 respondents (53.5%) reported that their monthly income is Php 10,000 or below -- covering the 3 lowest income brackets used in the survey (see Chart 2). This indicates that the majority of the respondents live on or below the poverty line.

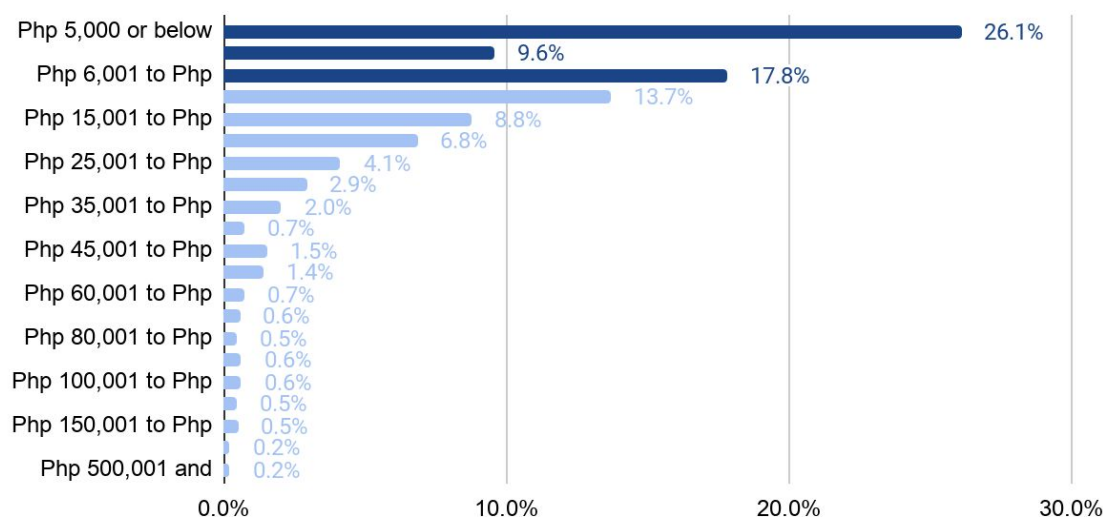


Chart 2. Respondents' reported monthly household incomes

Self-assessed economic condition

Based on their self-assessment, majority of the respondents (63.7%) reported that they are "Not rich, not poor". Only less than a percent of respondents claimed that their self-assessed economic condition is that they are Rich (0.4%) (Appendix, Chart 13).

Membership to IP Groups

24.1% of the respondents reported that they are members of Indigenous Peoples (IP) groups located in the province. Two-thirds of the respondents who self-reported that they are IPs are Cuyunon (66.7%) (Appendix, Chart 15).

Perceived quality of life before COVID-19 and present

When asked to rate their quality of life, 57% of the respondents said they were generally happy before the pandemic. Meanwhile, at present, almost half of the respondents (49%) claimed they are sad (see Table 2).

Perceived Quality of Life	Sad	Can't say	Happy
Before COVID-19 pandemic	27%	16%	57%
At present	49%	21%	30%

Table 2. Respondents' perceived quality of life before the start of the pandemic vs. at present

Internet Use and Access

Six in every 10 respondents (61.3%) reported that they are not subscribed to home internet.

Among those who reported that they do not have a home internet subscription at home (n=1,085), most of the respondents (89.8%) declared that they access the internet using mobile data subscription through their smartphone, followed by pocket WiFi (4.1%) (see Chart 3).

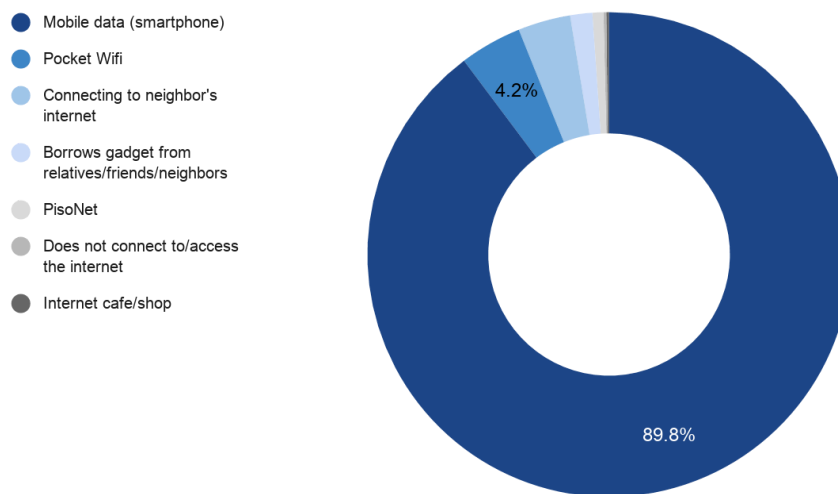


Chart 3. Respondents' (without home internet subscription) ways to access the internet

Regarding the number of hours spent on the internet on a daily basis, 1 in every 5 respondents (21.5%) spend **more than 8 hours** on the internet daily basis (Appendix, Chart 16).

Key Findings

1. Few Palawenos traveled as tourists in the province before the pandemic

56% of the respondents have not traveled as tourists in the province before the pandemic hit. Among these respondents, almost half traveled as local tourists for just 1-2 times in the pre-pandemic era (see Chart 4).

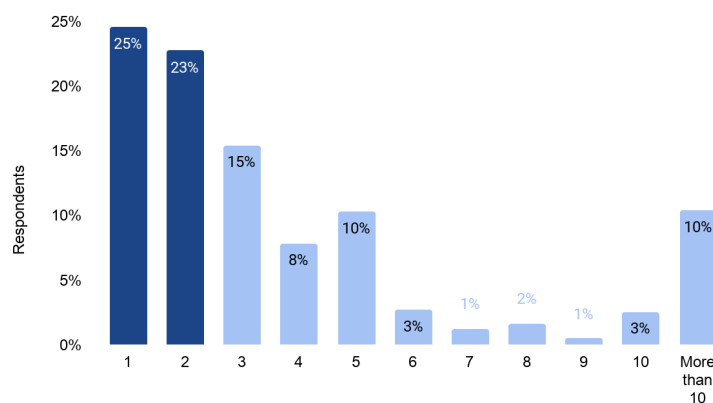


Chart 4. Respondents' frequency of travel as local tourists before the pandemic

Most of the respondents who traveled as local tourists before the pandemic had a limited capacity to spend, as 51.7% claimed to have spent Php 5,000 or less during their reported recent travel (*Appendix, Chart 18*). This may somehow be related to their minimal travel frequency (1-2 times) between January 2019 to February 2020 -- the pre-pandemic period considered for this study.

For this study, a total of 50 Palawan tourist areas were identified and provided as options for the respondents (*Appendix, Table 9*). Among the listed areas, these are the 10 most visited tourist areas in the province by the respondents before the pandemic (*see Chart 5*).

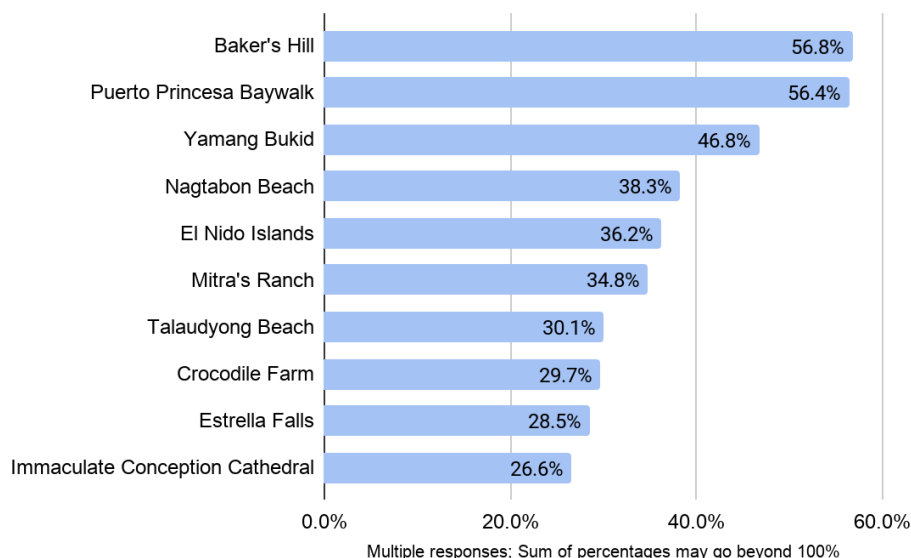


Chart 5. Most Visited Palawan Tourist Areas by Respondents who Traveled as Local Tourists (Pre-Pandemic)

2. Less Palaweños traveled as local tourists during the pandemic; Low number of confirmed cases and strict face mask and face shield policy are top reasons for traveling amidst the pandemic

Few Palaweños traveled as local tourists pre-pandemic, **and even less traveled during the pandemic (20%)**. A large majority of these respondents only spent Php 5,000 or below in their local tourism between July to November (60.1%), which is a bit consistent with the financial capacity reported by pre-pandemic local tourists.

Among the respondents who went as local tourists now, there are slightly more who were **comfortable with traveling (39.6%)** than those who felt otherwise (*see Table 3*).

Traveling in Palawan as tourist in the middle of a pandemic	Comfortable	Unsure	Uncomfortable
Total (n=351)	39.6%	27.6%	32.8%
Total Province, excluding Puerto Princesa respondents (n=147)	34.97%	26.53%	38.77%

Table 3. Comfort Level among Respondents who already went on local tourism during the pandemic

The low number of confirmed COVID cases and strict implementation of the face mask and face shield policy were cited as the top factors why the local tourists were comfortable traveling now (see Table 3). However, during the start of this survey period last November 5, Palawan saw its COVID-19 cases increase from two to 16 (during the week of November 2-8), with [12 reported from Mangsee Island in Balabac](#) and one each from Puerto Princesa City and El Nido town. And of the 14 new cases, two were classified as “local transmission” cases.

Reasons for being comfortable to travel as a tourist in Palawan in the middle of pandemic (n = 351)	Multiple Responses (Sum of % may go beyond 100%)
Low number of COVID-19 cases	75.2%
Strict implementation of wearing of face masks and face shields in public	62.1%
Businesses comply with minimum health standards	52.1%
Strict implementation of physical distancing	45.9%
Proper and strict contact tracing	43.6%
Adequate and proper quarantine facilities	37.9%
Adequate COVID-19 testing capacity	25.4%
Others	3.7%

Table 4. Reasons that made local tourists during the pandemic comfortable to travel

Eight out of the 10 most visited tourist areas by local tourists during the pandemic are also among the top 10 destinations by pre-pandemic local tourists. In this list, only Napsan Beach and Tagcawayan Beach are not among the top destinations visited by local tourists who traveled before the pandemic hit (see Chart 6).

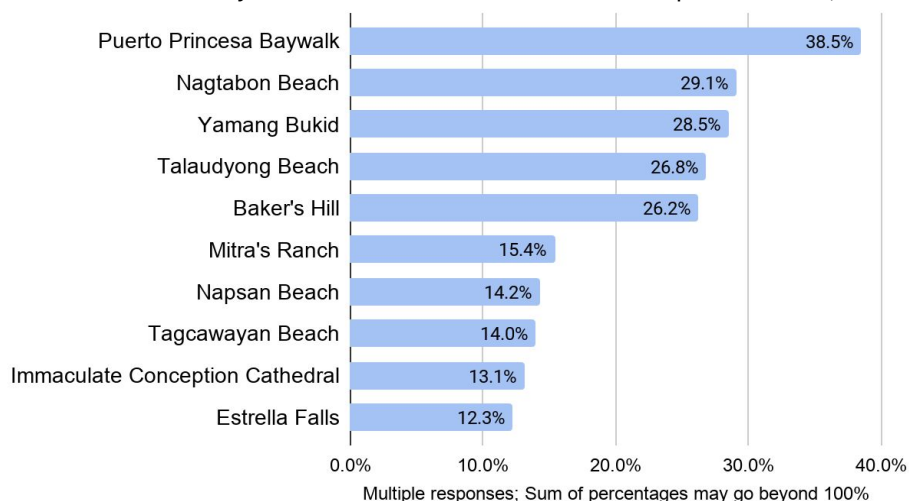


Chart 6. Most Visited Palawan Tourist Areas by Local Tourists during the Pandemic

3. *Most health measures implemented are adequately done; Enforcement of physical distance needs more attention*

Respondents who have already engaged in local tourism between July 2020 to November 2020 were asked about the adequacy of the implementation of various health measures as part of preventing the transmission of

COVID-19 in establishments and areas they visited. Almost all of the measures were rated to be more than 50% adequate except the **“Strict implementation of physical distancing”** -- which got the highest inadequacy rating among the measures. This may indicate a shortcoming in both individual responsibility (i.e. refusal of citizens to abide by the measure) and systemic measures on the side of the government and businesses (e.g. not setting a maximum capacity within establishment/vehicles, not arranging interiors efficiently).

Implementation of Health Measures* (n=351)	Inadequate	Moderately adequate	Adequate
Temperature check	17%	25%	59%
Filling out of contact tracing forms	19%	26%	56%
Wearing of face shields and face masks inside establishments and public transportation	16%	21%	64%
Establishments' provision of free alcohol / hand sanitizers in entry points	17%	18%	66%
Strict implementation of physical distancing	30%	27%	44%

*The total percentages per row may not total to 100% due to rounding up of the results.

Table 5. Adequacy of Implementation of Health Measures

4. *Lack of funds and fear of virus exposure are top concerns among non-travelers; Less than half plan to go on local tourism in the short-term*

The top reason for being uncomfortable to travel is driven by an economic factor more than possible health impact -- the respondents' spending capacity. This is consistent with the fact that majority of the respondents reported to earn Php 5,000 monthly, and may be related to the economic slowdown brought about by the lockdown (see Chart 7).

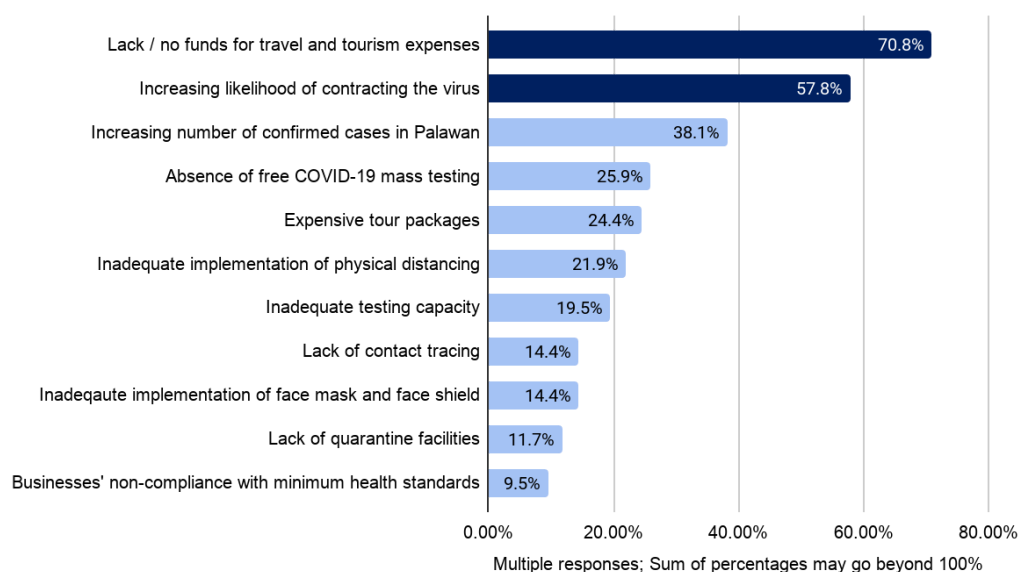


Chart 7. Reasons that made non-traveling respondents feel uncomfortable to travel in Palawan during the pandemic

The second top reason cited was the likelihood of exposure and getting COVID-19 -- which is indicative of the general reluctance of consumers to go out and do activities outside that impacts the recovery of businesses and overall economy.

Among the respondents who have yet to travel as local tourists during this pandemic, 46% plan to travel Palawan in the next few weeks or months. When asked which tourist areas in Palawan they plan to visit, the top 10 destinations they plan to visit are very different from that of the pre-pandemic and pandemic local tourists except for Yamang Bukid and Baker's Hill -- the only 2 destinations present in both top 10 lists (see *Chart 8*).

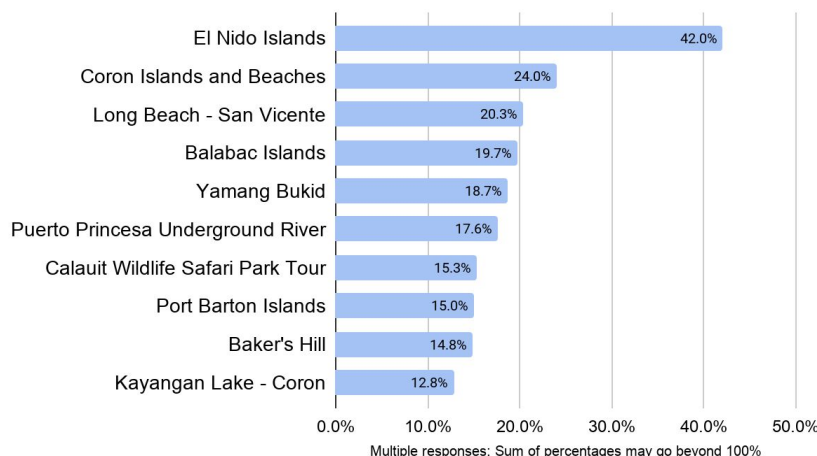


Chart 8. Top 10 Tourist Areas that non-travelers during the pandemic intend to visit in the next few weeks or months

5. *Low COVID cases and lower tour package prices will encourage local tourism; Quarantine in destination and swab test requirements are most likely to discourage respondent from traveling*

Encouraging Local Tourism among Palawenos

The top factor that can encourage them is having low to zero new confirmed COVID cases in the province, which is aligned with the “increased likelihood of getting the virus” being one of the top reasons why respondents who chose not to travel at present were uncomfortable about local tourism (See *Chart 9*).

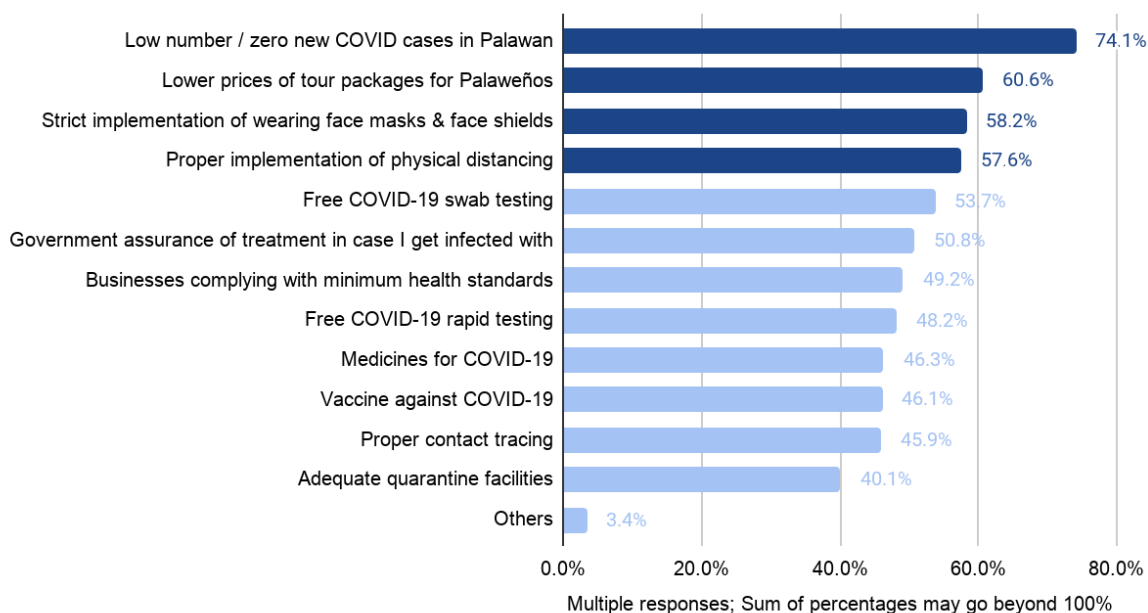


Chart 9. Factors that will encourage respondents to engage in local tourism

Impact of Imposition of Health Protocols on Travel Plans

With the national and local governments encouraging Filipinos to travel and asking LGUs to reopen their respective tourist areas for tourism, various health protocols are either being implemented or considered for implementation as part of the safe and gradual reopening.

Respondents were asked if they will still travel or not knowing that these health protocols need to be complied with. Results show that **respondents are more likely to be discouraged to travel if they need to be placed on quarantine in their destination (33%)** and if they need to undergo swab testing (18%) for their travel (see Chart 10).

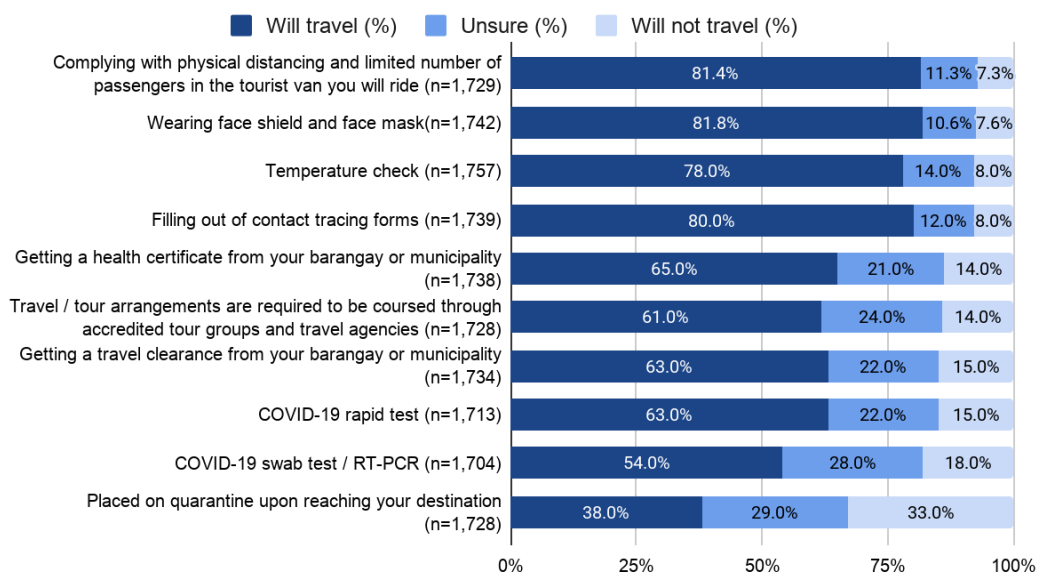


Chart 10. Health Protocols' Impact on Decision to Travel

6. A big majority of respondents favor and enticed by “Palawan Muna” campaign, despite only 4 in every 10 respondents knew about it

Only 43% of the respondents said that they are aware -- have read, heard, seen, or watched -- about the Palawan Muna campaign, launched by the Palawan Tourism Council in partnership with the provincial tourism office. Among the respondents who are aware of the campaign, **80.4%** reported that **social media** is their **main source of information** about it (See Chart 11).

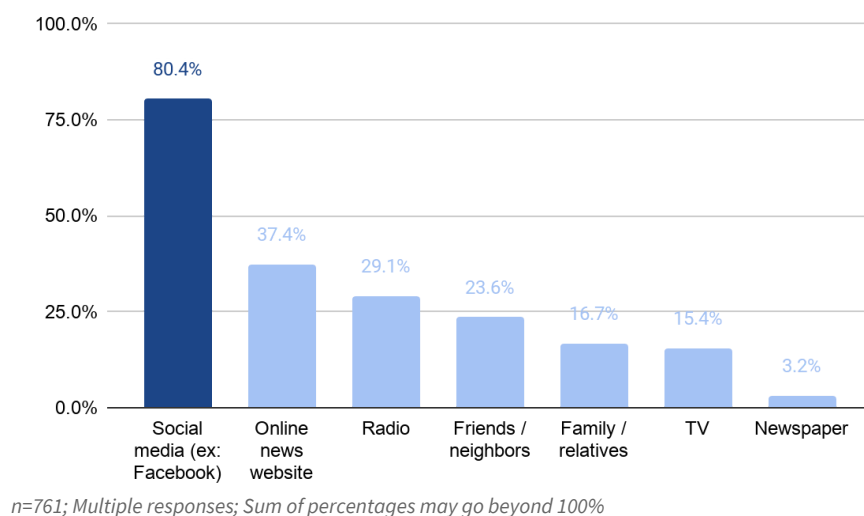


Chart 11. Sources of information about Palawan Muna Campaign

Despite this, 7 in every 10 respondents have **favorable views of its objective to encourage local tourism (70.3%)** and were **enticed to engage in local tourism (73.5%)** after reading, hearing, watching, or knowing about the local tourism initiative. This is a positive sign for the tourism stakeholders in the province and they must work on getting more people aware of the campaign's objective and put in place various mechanisms and protocols to make local tourism worthwhile and safe.

Among the respondents who claimed that they were enticed by Palawan Muna to go on local tourism, 54% intend to travel as local tourists by next year at the earliest (See Chart 12).

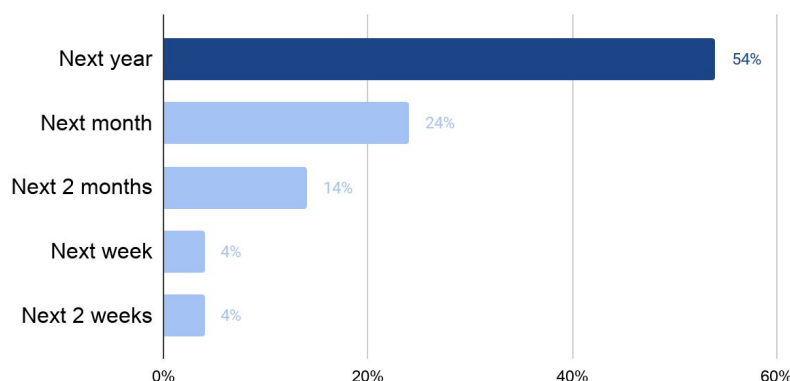


Chart 12. Intended time frame for local tourism by respondents enticed by Palawan Muna campaign

7. Reopening Palawan tourism to domestic, foreign tourists unfavorable

Despite the toll of closing the province's doors to tourists to their livelihood, respondents have an unfavorable view of reopening Palawan to both domestic (54%) and foreign (65%) tourists. Among the respondents who are in favor of reopening Palawan tourism to domestic (See Table 6) and foreign (See Table 7) tourists, respectively, the greatest number of respondents are unsure if they are comfortable with it.

Comfort Level with Reopening Palawan to Domestic Tourists*	Uncomfortable	Unsure	Comfortable
Total (n=813)	8.3%	48.6%	43.1%
Total Province** (n=377)	9.3%	49.2%	41.4%

Table 6. Comfort Level among respondent who favor reopening Palawan to domestic tourists

Comfort Level with Reopening Palawan to Foreign Tourists*	Uncomfortable	Unsure	Comfortable
Total (n=618)	8%	47%	45%
Total Province** (n=299)	8%	50%	42%

Table 7. Comfort Level among respondent who favor reopening Palawan to foreign tourists

*The total percentages per row may not total to 100% due to rounding up of the results.

** Excludes respondents from Puerto Princesa

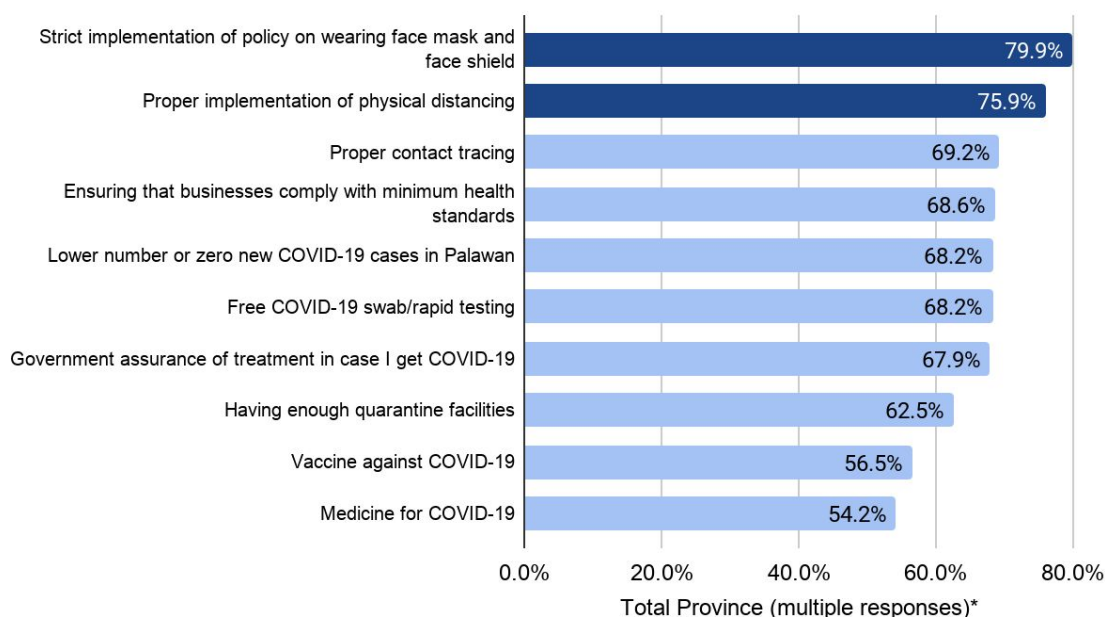
Should the provincial and the Puerto Princesa City governments, jointly or separately, decide to reopen, the high unfavorable view of such decision must be kept in mind and addressed to allay their concerns and apprehensions while trying to revive the local tourism sector and economy.

8. Strict implementation of minimum health standards by provincial government and establishments is key to make respondents feel comfortable with reopening Palawan for tourism

Must Do For Provincial Government

Respondents within the provincial government's jurisdiction think that the capitol must ensure that implementing health protocols such as the **face mask & face shield policy (79.9%)** and **proper physical distancing (75.9%)** will make them feel comfortable reopening Palawan tourism (See Chart 13).

It is also worth noting that the top options that followed, **COVID-19 testing (68.2%)** and **government assurance of treatment for people who may get the virus (67.9%)**, are both health concerns mainly driven by financial capacity.

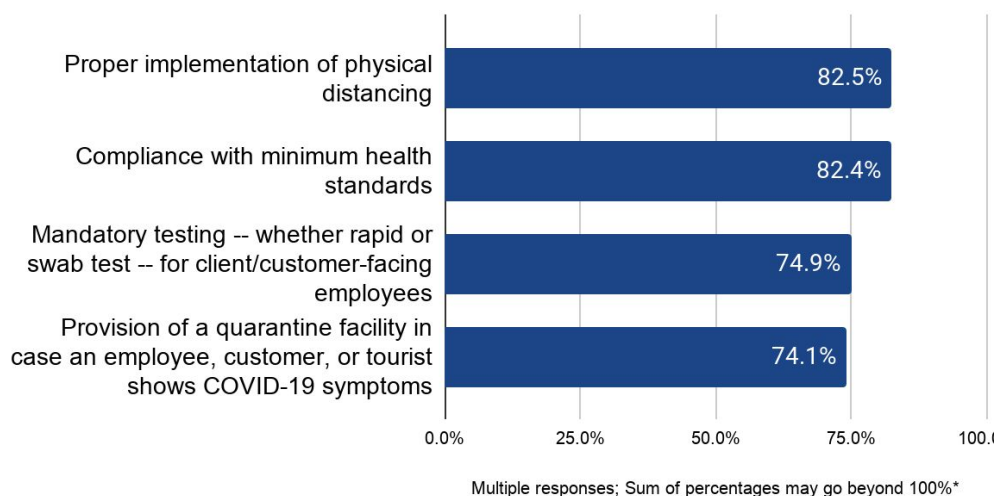


*n = 299; Respondents who agree with reopening province to foreign tourists; excludes respondents from Puerto Princesa
Multiple responses; Sum of percentages may go beyond 100%

Chart 13. Actions that the provincial government must implement to make respondents feel comfortable with tourism reopening

Businesses' To-Do List to Make Palaweños Comfortable with Tourism Reopening

Respondents want businesses to properly implement physical distancing (82.5%) and comply with minimum health standards (82.4%) to make them feel comfortable with reopening tourism.



*n = 618 (Respondents who agree with reopening province to foreign tourists)

Chart 14. Respondents' answers on which actions businesses must undertake to make them feel comfortable with tourism reopening

Implementation of proper physical distancing is a primary concern among the respondents since its relative inadequacy in implementation was observed, as reflected in the earlier results.

APPENDIX

Detailed Findings

Additional Respondent Information

Sex

Of the 1,767 respondents that answered the survey, a big majority were female (62.2%). This male-female ratio is skewed compared to that of the combined population of Palawan and Puerto Princesa City based on the 2015 Census of Population and the July 2020 Projected Mid-year Population by the PH Statistics Authority.

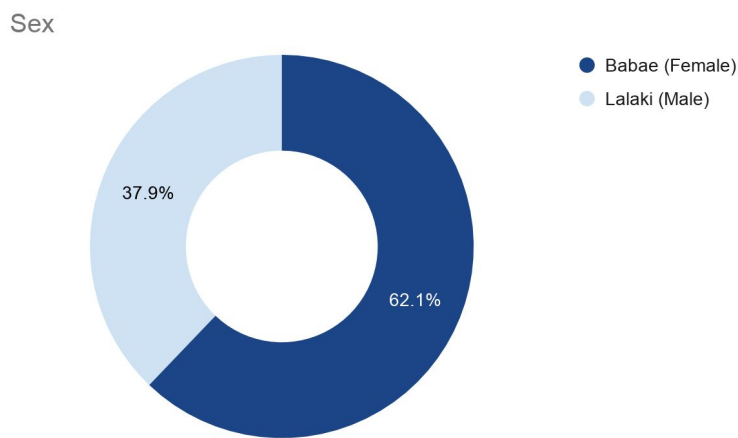


Chart 15. Distribution of sex of respondents

Age

Half of the respondents (52.85%) are aged between 19-27 years old. This is somehow expected since the survey was conducted and distributed online and will likely reach the younger segment of the population more than the others, given that the former is more accustomed to digital technology by virtue of their upbringing in the computer age.

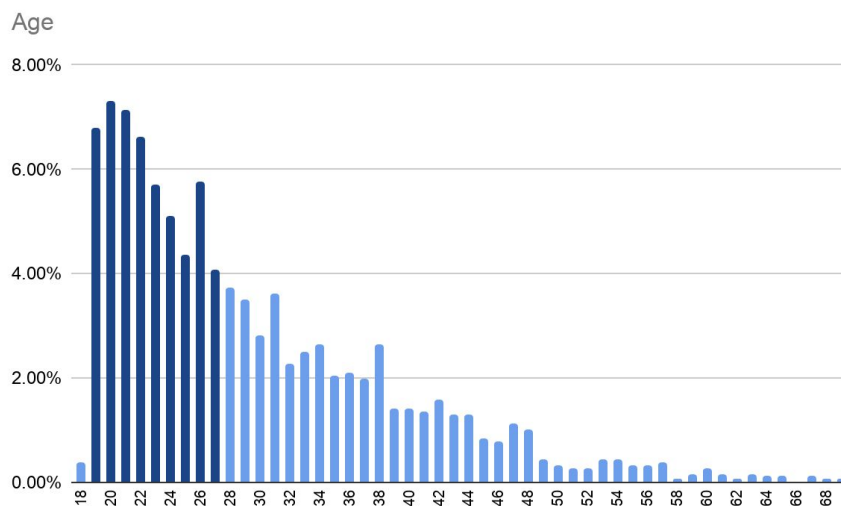


Chart 16. Distribution of respondents' declared ages

Self-assessed economic condition

Based on their self-assessment, majority of the respondents (63.7%) reported that they are Poor (*Mahirap*). Only less than a percent of respondents claimed that their self-assessed economic condition is that they are Rich or *Mayaman* (0.2%).

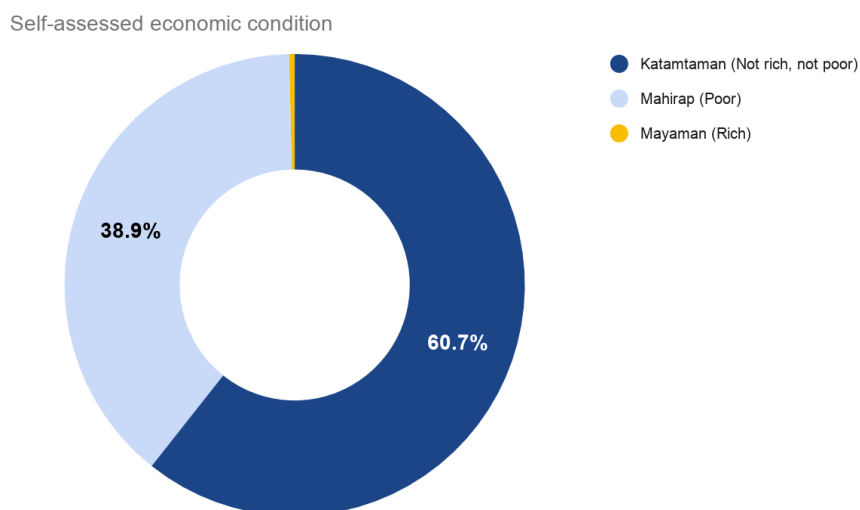


Chart 13. Respondents' self-assessed economic condition

Respondents' IP Membership

24.2% of the respondents reported that they are members of Indigenous Peoples (IP) groups located in the province.

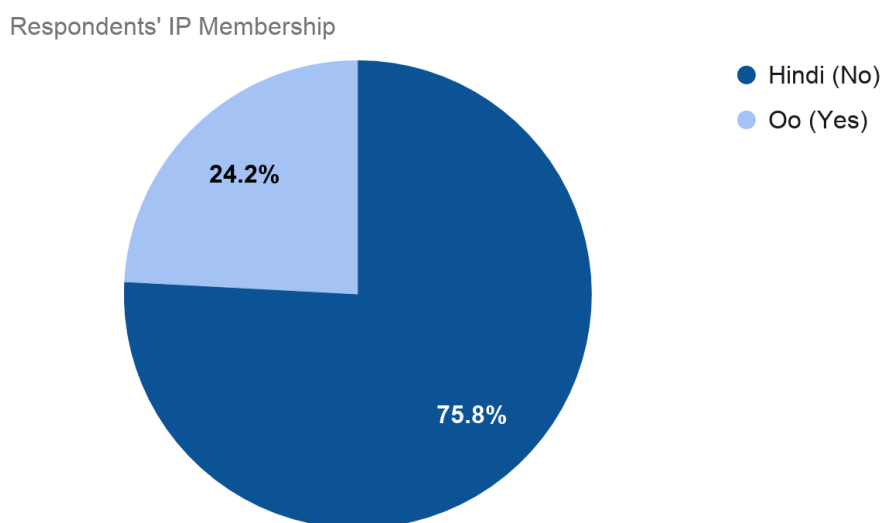


Chart 14. Distribution of respondents who declared to be a member of IP Groups in Palawan

IP Membership by Group

Among the respondents who reported membership with Palawan's indigenous peoples, two-thirds of them reported that they are Cuyunon (66.7%).

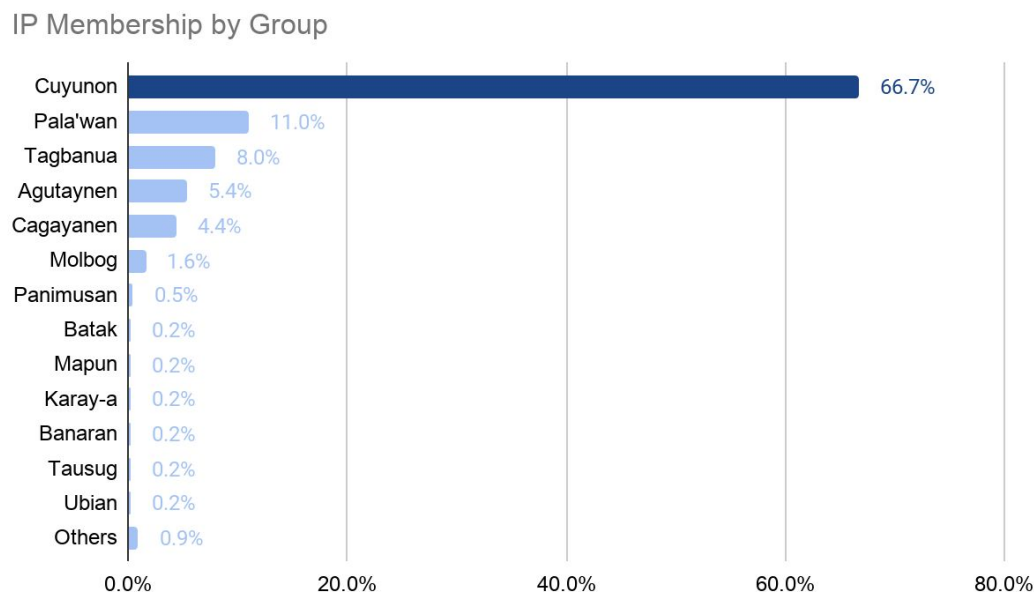


Chart 15. IP Respondents' reported membership with IP Groups in Palawan

Daily internet use

The greatest number of respondents (21.6%) claimed that they spend more than 8 hours on the internet per day -- despite the connectivity issues experienced in the province.

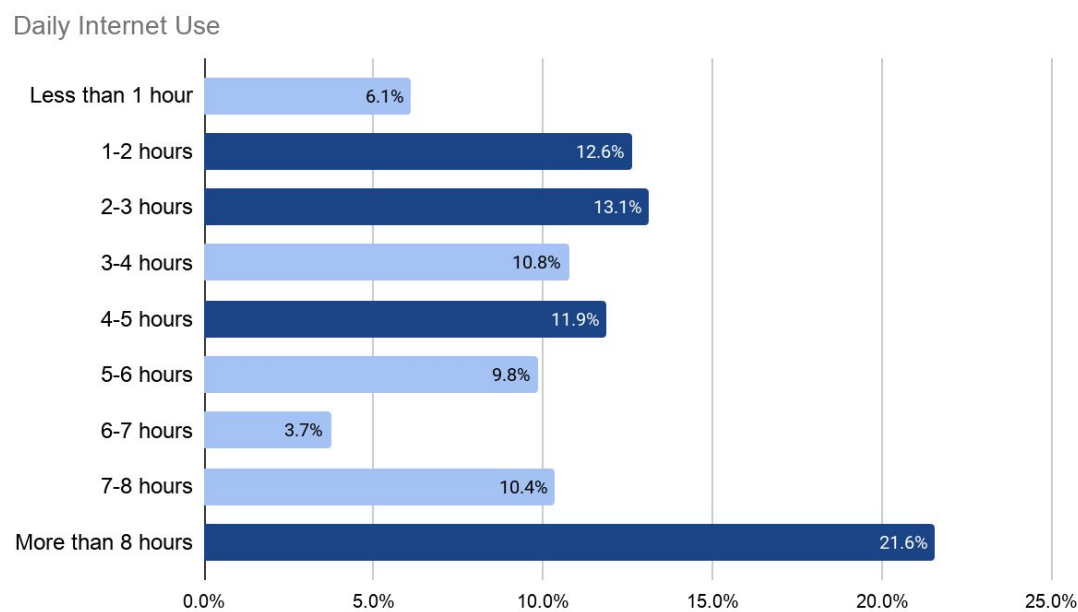


Chart 16. Respondents' reported daily internet use

Voter registration

Most of the respondents (86%) reported that they are registered voters for the upcoming 2022 synchronised national and local elections.

Registered voters for 2022	N	Yes	No
<i>Puerto Princesa City</i>	953	85%	15%
Narra	91	86%	14%
Coron	85	86%	14%
El Nido	76	76%	24%
Brooke's Point	70	84%	16%
Bataraza	70	89%	11%
San Vicente	68	90%	10%
Taytay	58	79%	21%
Aborlan	53	81%	19%
Roxas	53	96%	4%
Sofronio Española	40	95%	5%
Busuanga	37	100%	0%
Quezon	32	94%	6%
Rizal	24	79%	21%
Culion	13	85%	15%
Balabac	11	82%	18%
Cuyo	10	80%	20%
Dumaran	7	100%	0%
Araceli	6	100%	0%
Agutaya	5	80%	20%
Linapacan	3	100%	0%
Cagayancillo	1	100%	0%
Magsaysay	1	100%	0%
Kalayaan	0	0%	0%
Total	1767	86%	14%
Total excl. PPC	814	87%	13%

Table 8. Distribution of respondents' voter registration status, by municipality

Pre-Pandemic Travel in Palawan

Information presented in this section is based on the respondents' answers to questions regarding their pre-pandemic travel habits in Palawan, particularly between January 2019 up to February 2020.

Incidence of Local Tourism

Majority of the respondents did not travel in Palawan as tourists in the pre-pandemic period (48.1%) (see Chart 17). This may be driven, aside from economic factors, by the fact that in the past, Palawan as a tourist destination mainly caters to domestic and foreign tourists.

Pre-Pandemic Travel as Tourist within Palawan

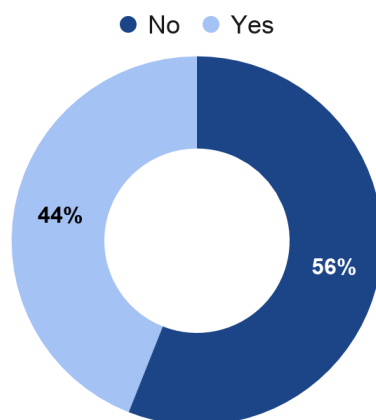


Chart 17. Distribution of respondents who traveled as local tourists before the pandemic

Local Tourism Expenses

51.7% of the respondents who engaged in local tourism reported that they spent only Php 5,000 or less in their last pre-pandemic travel in the province (see Chart 17). This may be connected with the fact that majority of the respondents of this survey earn Php 10,000 or less monthly.

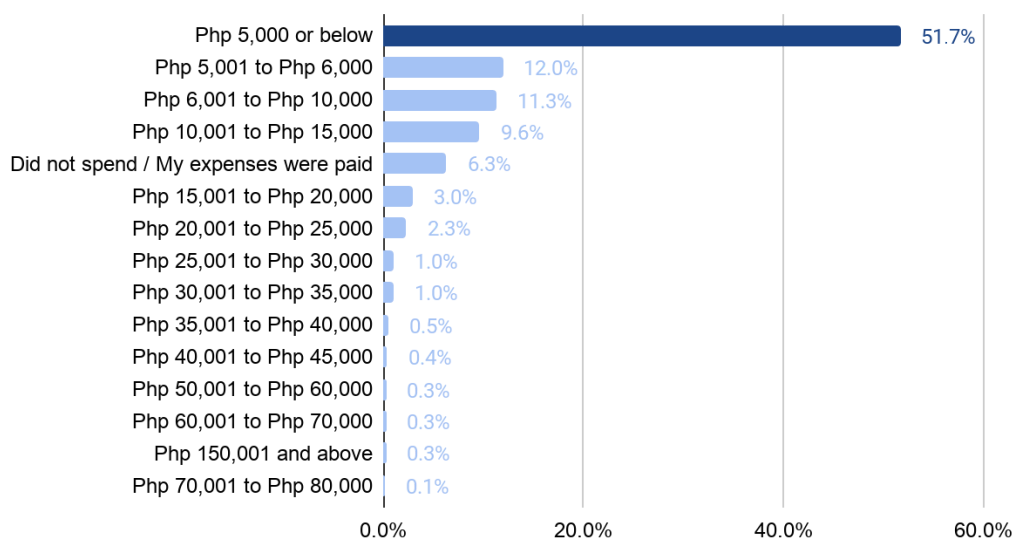


Chart 18. Distribution of travel expense amounts incurred by respondents who engaged in local tourism before the pandemic

Accommodations

When asked about their accommodations during their pre-pandemic travels in the province, the respondents who went as local tourists usually stay with their relatives (36.9%), in a pension / lodging house (31.1%), or with their friends (30.6%).

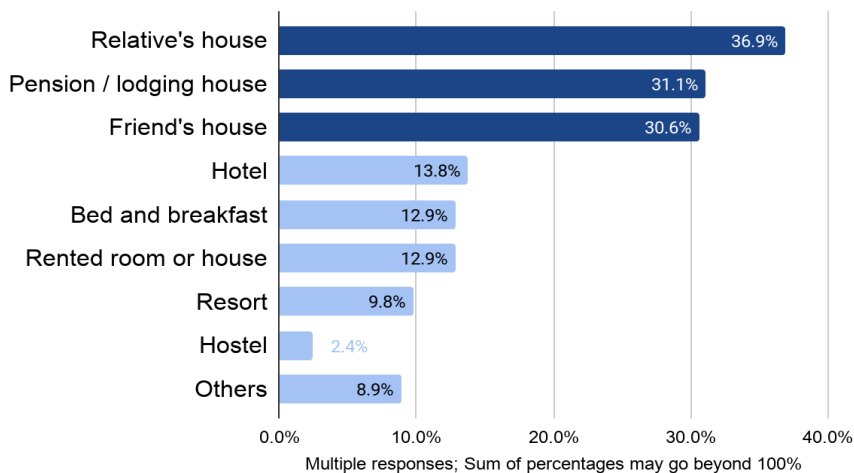


Chart 19. Local tourists' accommodation during their recent travel in Palawan before the pandemic

Mode of Transportation

The greatest number of respondents rode a public utility van (49.2%) to reach their destination during their recent local tourism before the pandemic. This is aligned with the limited spending reported by these respondents.

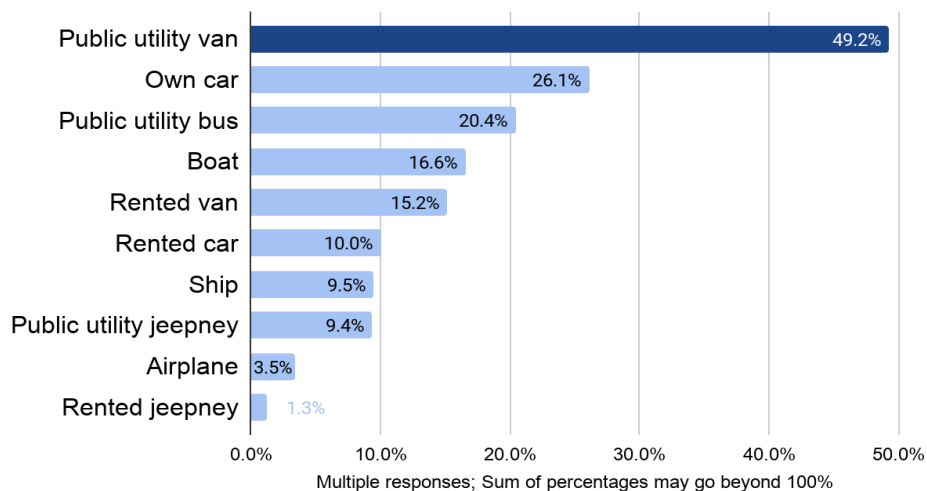


Chart 20. Respondents' mode of transportation during their recent local tourism in Palawan before the pandemic

Modes of Reservation

Respondents were also asked about their modes of reserving their accommodations and transportation (and tour packages, if applicable) during their recent, pre-pandemic tourism in Palawan. Most of these respondents claimed that they made the necessary reservations through their friends / known contacts (81.4%). They also reported that their reservations were transacted through a Facebook page (21.7%) -- in far second after the friends and contacts.

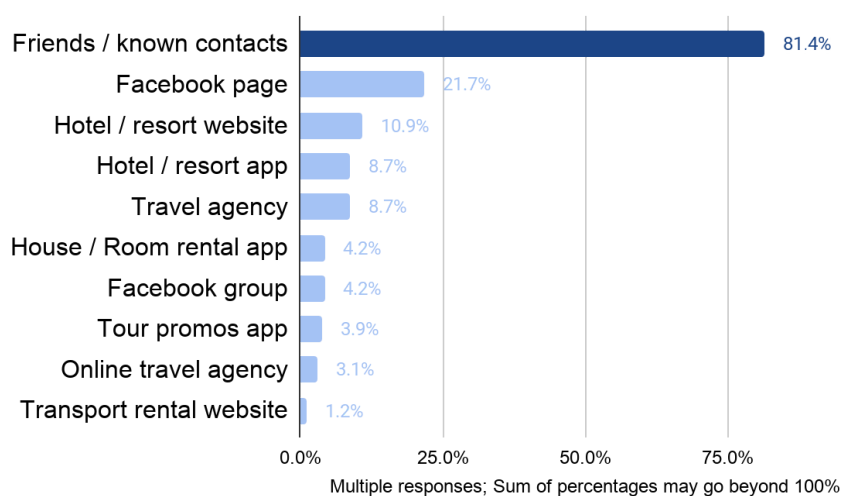


Chart 21. Respondents' mode of reservation for their recent local tourism in Palawan before the pandemic

Tourist Areas Visited

The researchers listed 50 tourist areas in Palawan, out of the many destinations in the province, based on overall popularity. Only 2 out of the 50 areas (Baker's Hill and Puerto Princesa Baywalk) were visited by more than 50% of the respondents who travelled before the pandemic.

Tourist Areas	Pre-Pandemic Travel
Baker's Hill	56.81%
Puerto Princesa Baywalk	56.43%
Yamang Bukid	46.79%
Nagtabon Beach	38.30%
El Nido Islands	36.25%
Mitra's Ranch	34.83%
Taladyong Beach	30.08%
Crocodile Farm	29.69%
Estrella Falls	28.53%
Immaculate Conception Cathedral	26.61%
Honda Bay Islands	24.16%
Puerto Princesa Underground River	23.52%
Plaza Cuartel	20.57%
Long Beach - San Vicente	19.28%
Lio Beach	19.02%
Balsahan River - Puerto Princesa	18.12%
Port Barton Islands	17.48%

Nacpan Beach	17.35%
Iwahig Penal Colony	16.32%
Napsan Beach	15.30%
Tagcawayan Beach	11.31%
Brooke's Point Ecological Park	10.03%
Coron Islands and Beaches	9.13%
Gintong Butil Agri Farm	7.58%
Mt. Tapyas- Coron	6.94%
Sabsaban Falls -Brooke's Point	6.68%
Tabon Caves	6.68%
Twin Beach - El Nido	6.56%
Kayangan Lake - Coron	6.30%
Ugong Rock	6.30%
Maquinit Hot Springs - Coron	6.17%
Balabac Islands	5.78%
Calauit Wildlife Safari Park Tour	5.78%
Duli Beach - El Nido	5.66%
Taraw Cliff - El Nido	4.37%
Barracuda Lake - Coron	4.24%
Coral gardens of Coron/Busuanga	2.96%
Ille Cave - El Nido	2.70%
St. Augustine Parish Church - Cuyo	2.70%
Ursula Island - Bataraza	2.70%
Mt. Aguado - Cuyo	2.57%
Lagen Island - El Nido	2.44%
Onok Island	2.44%
Arena Island	2.31%
El Nido Via Ferrata Canopy	2.19%
Candaraman Island	2.06%
Makinit Hot Springs - El Nido	1.54%
Punta Sebaring	1.41%
Bakbakan Falls	1.29%
Tubbataha Reef National Marine Park	1.16%

n=778; Multiple responses; Sum of percentages may go beyond 100%

Table 9. Tourist areas in Palawan visited by respondents who went as local tourists before the pandemic

Pre-Pandemic Travel in the Philippines

Information presented in this section is based on the respondents' answers to questions regarding their pre-pandemic travel habits in the Philippines, particularly between January 2019 up to February 2020.

Incidence of Domestic Tourism

A big majority of the respondents did not travel in the Philippines as tourists in the pre-pandemic period (71.6%) (see Chart 22). This may be aligned with the reported minimal monthly income received by majority of the respondents, which may be complicated by the costly airfare and other travel expenses.

Pre-Pandemic Travel as a Tourist - Philippines

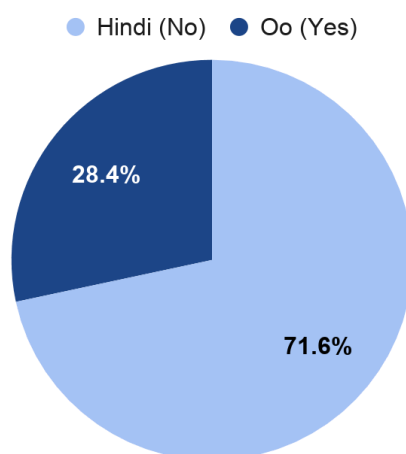


Chart 22. Distribution of respondents who traveled as domestic tourists before the pandemic

Frequency of domestic travel

The greatest number of respondents who traveled domestically before the pandemic only traveled **once** during that period (47.9%), followed by those who traveled only 2x (24.6%). Such results are similar to the local tourists' travel frequency before the pandemic -- which is also limited to just 1-2x during the same period.

Frequency of travel as tourist in PH (pre-pandemic; n=501)	Respondents (%)
1	47.9%
2	24.6%
3	12.0%
4	6.0%
5	3.4%
6	2.0%
7	0.6%

8	0.6%
9	0.4%
10	1.2%
More than 10	1.4%

The total percentage may not total to 100% due to rounding up of the results.

Table 10. Distribution of domestic travel frequency among respondents who traveled in PH before the pandemic

Domestic Tourism Expenses

59.68% of the respondents who traveled domestically pre-pandemic only spent anywhere between Php 5,000 or below to Php 10,001 to Php 15,000 (see Table 11). Considering that domestic travel coming from Palawan requires mainly air transport, the travel expenses incurred by self-reporting domestic travelers is very minimal and may just cover the airfare.

Travel Expense - Pre-pandemic travel as tourist in PH	Respondents (%)
Php 5,000 or below	21.36%
Php 6,001 to Php 10,000	15.97%
Php 10,001 to Php 15,000	14.57%
Php 15,001 to Php 20,000	13.57%
Php 5,001 to Php 6,000	7.78%
Php 20,001 to Php 25,000	7.19%
Did not spend / My expenses were paid by someone else	5.39%
Php 25,001 to Php 30,000	3.59%
Php 30,001 to Php 35,000	3.19%
Php 45,001 to Php 50,000	2.00%
Php 50,001 to Php 60,000	2.00%
Php 35,001 to Php 40,000	1.20%
Php 40,001 to Php 45,000	0.80%
Php 100,001 to Php 120,000	0.60%
Php 60,001 to Php 70,000	0.20%
Php 70,001 to Php 80,000	0.20%
Php 90,001 to Php 100,000	0.20%
Php 150,001 and above	0.20%

The total percentage may not total to 100% due to rounding up of the results.

Table 11. Distribution of domestic travel expense among respondents who traveled in PH before the pandemic

Areas in PH Visited

The researchers listed a list of top travel destinations in the country, to give respondents enough options without overwhelming them. Only Metro Manila (53.29%) was visited by more than 50% of the respondents who went on domestic tourism before the pandemic. Of the top PH destinations visited, 6 of the top 10 are in Luzon, 4 are in Visayas, while there's no Mindanao destination (*See Table 12*).

Pre-Pandemic Travel - PH (Locations)	Responses (%)
Metro Manila	53.29%
Baguio City	22.16%
Cebu City	19.36%
Tagaytay City	11.38%
Iloilo City	9.78%
Batangas City	9.38%
Clark	6.99%
Bohol	5.99%
Cebu Province	5.59%
Vigan City	5.19%
La Union	3.99%
Bacolod City	3.59%
Davao City	3.39%
Pagudpud	3.39%
Boracay	3.19%
Laoag City	2.99%
Subic	2.79%
Zambales	2.40%
Camarines Sur	2.20%
Puerto Galera	1.80%
Aklan	1.60%
Siargao	1.20%
Zamboanga City	1.20%
General Santos City	1.00%
Tacloban City	0.80%
Aurora	0.60%
Dumaguete City	0.00%
Others	27.35%

n=501; Multiple responses; Sum of percentages may go beyond 100%

Table 9. PH destinations visited by respondents who went as domestic tourists before the pandemic

Pandemic Travel in Palawan

Information presented in this section is based on the respondents' answers to questions regarding their local tourism in Palawan during the pandemic, particularly between July 2020 to the second week of November 2020.

Incidence of Local Tourism

Most of the respondents did not travel in Palawan as tourists during the pandemic period (80.1%) (see Chart 23). The percentage of local travelers during the pandemic is lower than pre-pandemic (see Chart 17).

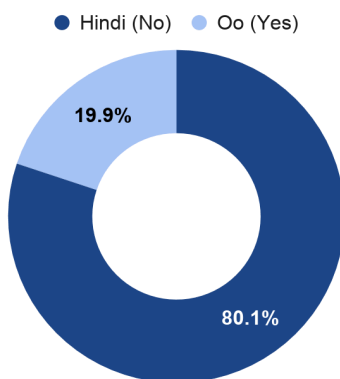


Chart 23. Distribution of respondents who traveled as local tourists during the pandemic

Local Tourism Expenses

60.1% of the respondents who engaged in local tourism reported that they spent only Php 5,000 or less in their travel during the pandemic (see Chart 24).

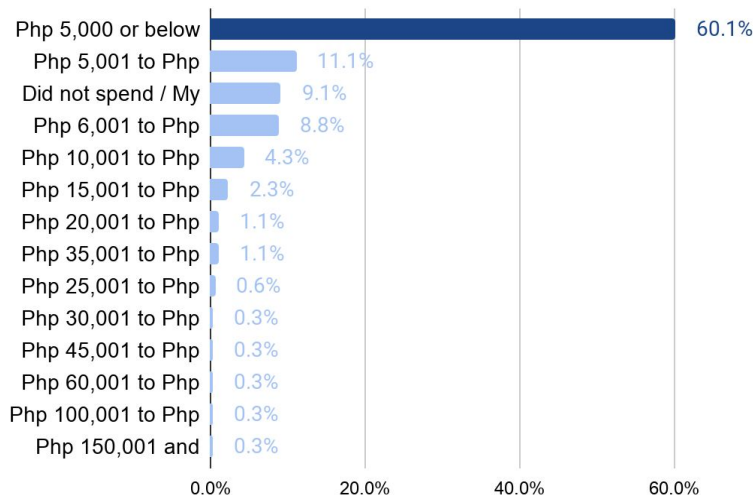


Chart 24. Distribution of travel expense amounts incurred by respondents who engaged in local tourism during the pandemic

Tourist Areas Visited

8 of the 10 most visited areas during the pandemic were among the top 10 most visited destinations by pre-pandemic local tourists, except for the beaches of Napsan (14.25%) and Tagcawayan (13.96%).

Tourist Areas	Pandemic Travel
Puerto Princesa Baywalk	38.46%
Nagtabon Beach	29.06%
Yamang Bukid	28.49%
Talaudyong Beach	26.78%
Baker's Hill	26.21%
Mitra's Ranch	15.38%
Napsan Beach	14.25%
Tagcawayan Beach	13.96%
Immaculate Conception Cathedral	13.11%
Estrella Falls	12.25%
Crocodile Farm	9.40%
El Nido Islands	8.26%
Long Beach - San Vicente	8.26%
Port Barton Islands	8.26%
Nacpan Beach	8.26%
Plaza Cuartel	6.84%
Lio Beach	6.27%
Brooke's Point Ecological Park	6.27%
Puerto Princesa Underground River	5.41%
Iwahig Penal Colony	5.41%
Gintong Butil Agri Farm	5.41%
Honda Bay Islands	4.84%
Balsahan River - Puerto Princesa	4.56%
Sabsaban Falls - Brooke's Point	4.56%
Balabac Islands	4.27%
Tabon Caves	3.42%
Duli Beach - El Nido	3.13%
Coron Islands and Beaches	2.85%
Kayangnan Lake - Coron	1.99%
Mt. Tapyas- Coron	1.71%
Onok Island	1.71%
Bakbakan Falls	1.71%

Twin Beach - El Nido	1.42%
Taraw Cliff - El Nido	1.42%
Ursula Island - Bataraza	1.42%
Arena Island	1.42%
Ugong Rock	1.14%
El Nido Via Ferrata Canopy	1.14%
Maquinit Hot Springs - Coron	0.85%
Barracuda Lake - Coron	0.85%
Coral gardens of Coron/Busuanga	0.85%
Ille Cave - El Nido	0.85%
Candaraman Island	0.85%
Calauit Wildlife Safari Park Tour	0.57%
Lagen Island - El Nido	0.57%
St. Augustine Parish Church - Cuyo	0.28%
Mt. Aguado - Cuyo	0.28%
Makinit Hot Springs - El Nido	0.28%
Punta Sebaring	0.28%
Tubbataha Reef National Marine Park	0.28%

n=351; Multiple responses; Sum of percentages may go beyond 100%

Table 10. Palawan destinations visited by respondents who went on domestic tourism during the pandemic

Plan to Travel in Palawan among non-pandemic travelers

Among the respondents who did not go on local tourism during the pandemic, only 46% have a plan to go out and travel in the next few weeks or months.

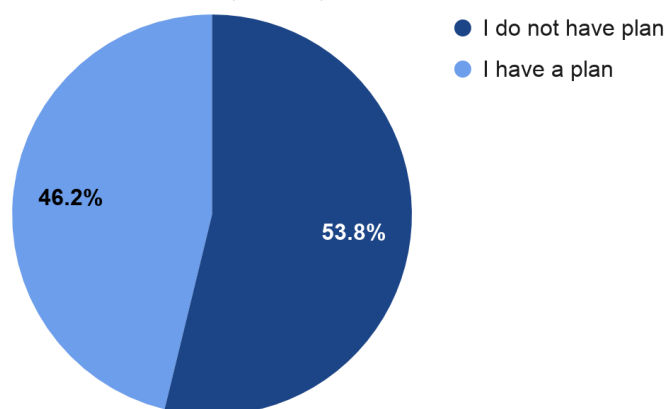


Chart 25. Distribution of respondents who did not travel during the pandemic that may or may not have plans to travel in Palawan soon

Top Destinations for Planned Local Tourism

Respondents who did not travel as local tourists during the pandemic and have a plan to travel in the next few weeks or months were asked about the Palawan tourist areas they intend to visit. 2 of the top 10 destinations they intend to visit -- Yamang Bukid (18.65%) and Baker's Hill (14.83%) were also in the pre-pandemic and pandemic top destinations lists.

Tourist Areas	Intend to Visit
El Nido Islands	42.05%
Coron Islands and Beaches	24.01%
Long Beach - San Vicente	20.34%
Balabac Islands	19.72%
Yamang Bukid	18.65%
Puerto Princesa Underground River	17.58%
Calauit Wildlife Safari Park Tour	15.29%
Port Barton Islands	14.98%
Baker's Hill	14.83%
Kayangang Lake - Coron	12.84%
Nagtabon Beach	12.23%
Puerto Princesa Baywalk	11.62%
Barracuda Lake - Coron	11.62%
Nacpan Beach	11.47%
Lio Beach	11.31%
Honda Bay Islands	11.31%
Taladyong Beach	11.16%
Onok Island	11.16%
Estrella Falls	10.70%
Coral gardens of Coron/Busuanga	9.63%
Twin Beach - El Nido	9.48%
Tubbataha Reef National Marine Park	9.33%
Tabon Caves	9.17%
Duli Beach - El Nido	8.87%
Mt. Tapyas- Coron	8.41%
Balsahan River - Puerto Princesa	8.10%
Maquinit Hot Springs - Coron	7.65%
Crocodile Farm	7.49%
Taraw Cliff - El Nido	7.49%

Lagen Island - El Nido	7.49%
Napsan Beach	7.34%
Gintong Butil Agri Farm	7.19%
Makinit Hot Springs - El Nido	7.19%
Ursula Island - Bataraza	6.73%
Mitra's Ranch	6.27%
El Nido Via Ferrata Canopy	6.12%
Ille Cave - El Nido	6.12%
Brooke's Point Ecological Park	5.96%
Ugong Rock	5.96%
Mt. Aguado - Cuyo	5.81%
Arena Island	5.35%
Tagcawayan Beach	4.89%
Sabsaban Falls - Brooke's Point	4.28%
Candaraman Island	4.13%
Immaculate Conception Cathedral	3.36%
Iwahig Penal Colony	3.36%
St. Augustine Parish Church - Cuyo	3.36%
Plaza Cuartel	2.75%
Bakbakan Falls	2.75%
Punta Sebaring	2.14%

n=654; Multiple responses; Sum of percentages may go beyond 100%

Table 11. Palawan destinations that non-pandemic traveling respondents who plan to go on domestic tourism soon intend to visit

Palawan Muna Campaign

This section focuses on the results regarding Palawan Muna, the campaign launched by the Palawan Tourism Council (PTC) in September 2020, in partnership with the provincial tourism office of Palawan.

Awareness of the campaign

Only 4 in every 10 respondents (43%) were able to hear, read, or watch information about the campaign, which aims to encourage Palaweños to travel and explore the tourist attractions of Palawan in the middle of the pandemic (See Chart 26).

Awareness on Palawan Muna Campaign

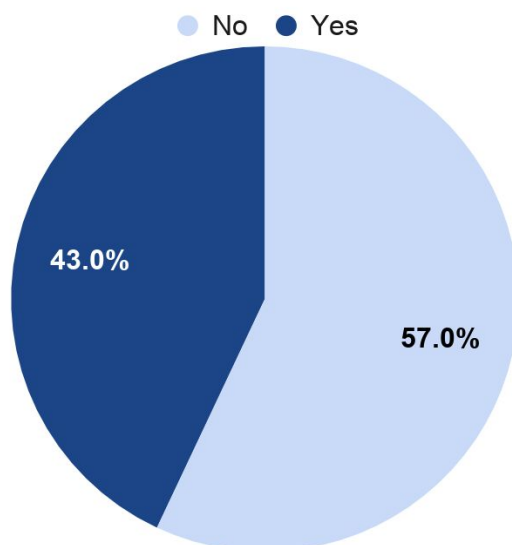


Chart 26. Distribution of respondents based on their awareness of the Palawan Muna Campaign

Specific Information Sources

Of the different information sources, around 80% of the respondents who were aware of the campaign said they got their information from Social Media, followed by Online news websites (37.4%). But among specific information sources, particularly Palawan media entities, the top 5 are Palawan News, Bandera News TV Philippines, Brigada News FM Palawan, Palawan Daily, and The Palawan Star.

Palawan Muna Campaign - Specific Info Sources (n=761)

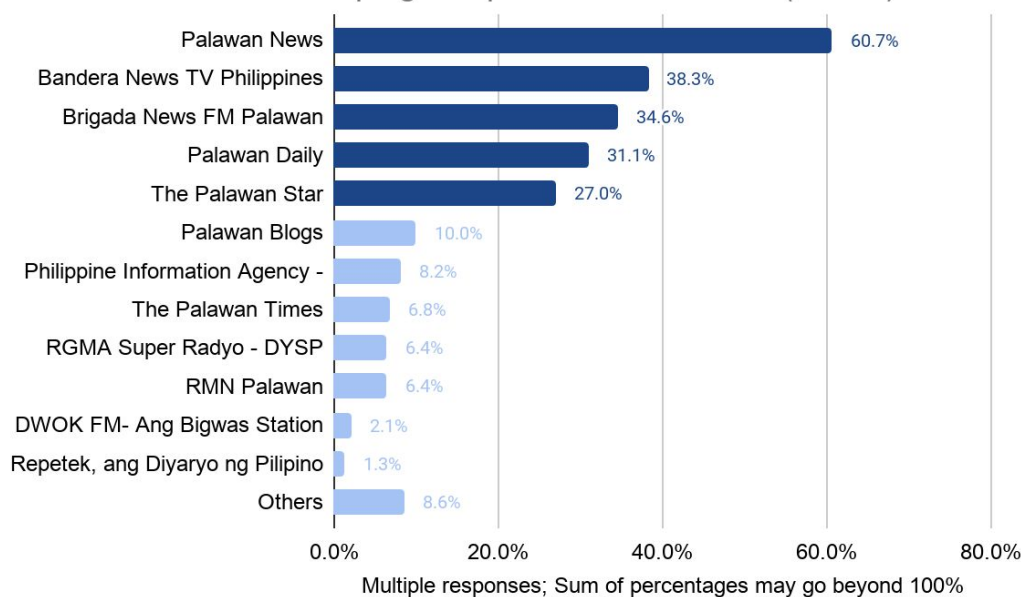


Chart 27. Specific information sources of respondents who were aware of the Palawan Muna campaign

Should the PTC and the provincial tourism office decide to amplify the campaign, these media outlets will likely provide them a considerable amount of reach among Palaweños.

Favorability of the Campaign's objective and Enticing to Travel

Despite having less than half of the respondents who are aware of the campaign, **7 in every 10 respondents** have **favorable views of its objective to encourage local tourism (See Chart 28)** and were **enticed to engage in local tourism (See Chart 29)** after reading, hearing, watching, or knowing about the local tourism initiative.

Favorability of Palawan Muna Campaign's Objective

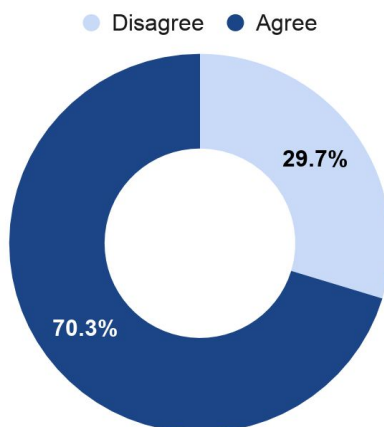


Chart 28. Distribution of respondents' favorability of the campaign's objective

This is a positive sign for the tourism stakeholders in the province and they must work on getting more people aware of the campaign's objective and put in place various mechanisms and protocols to make local tourism worthwhile and safe.

Enticed by Palawan Muna Campaign to Travel as Tourist

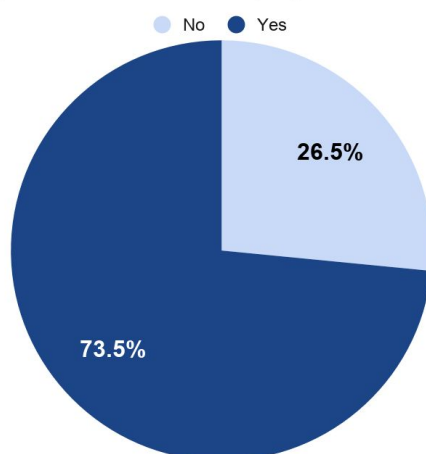


Chart 29. Distribution of respondents who were enticed by the Palawan Muna campaign to go on local tourism

Among the respondents who claimed that they were enticed by Palawan Muna to go on local tourism, 54% intend to travel as local tourists by next year at the earliest (See Chart 12, Key Results).

Sentiments on Reopening Palawan

This section focuses on the results regarding Palawan Muna, the campaign launched by the Palawan Tourism Council (PTC) in September 2020, in partnership with the provincial tourism office of Palawan.

Reopening Palawan to Domestic and Foreign Tourists

Despite the toll of closing the province's doors to tourists to their livelihood, majority of the respondents have an unfavorable view of reopening Palawan to both domestic (See Chart 30) and foreign (See Chart 31) tourists.

Favorability of Reopening Palawan to Domestic Tourists

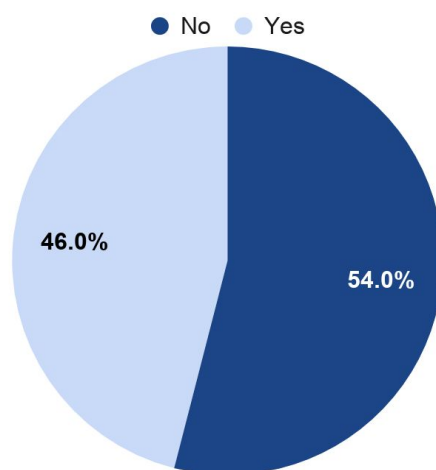


Chart 30. Distribution of respondents' views on reopening Palawan to domestic tourists

Only 10 localities in Palawan have more than 50% of its respondents having favorable views towards reopening Palawan to domestic tourists (See Table 12).

Reopening Palawan to Domestic Tourists	N	Yes	No
Puerto Princesa City	953	46%	54%
Narra	91	33%	67%
Coron	85	69%	31%
El Nido	76	54%	46%
Bataraza	70	40%	60%
Brooke's Point	70	41%	59%
San Vicente	68	46%	54%
Taytay	58	40%	60%
Aborlan	53	40%	60%
Roxas	53	47%	53%
Sofronio Española	40	30%	70%

Busuanga	37	62%	38%
Quezon	32	31%	69%
Rizal	24	38%	63%
Culion	13	54%	46%
Balabac	11	55%	45%
Cuyo	10	90%	10%
Dumaran	7	29%	71%
Araceli	6	100%	0%
Agutaya	5	60%	40%
Linapacan	3	33%	67%
Cagayancillo	1	100%	0%
Magsaysay	1	100%	0%
Kalayaan	0	0%	0%
Total	1767	46%	54%
Total Province (excl. PPC)	814	46%	54%

The total percentage may not total to 100% due to rounding up of the results.

Table 12. Distribution of respondents who agree or disagree with reopening Palawan to domestic tourists, by municipality

Favorability of Reopening Palawan to Foreign Tourists

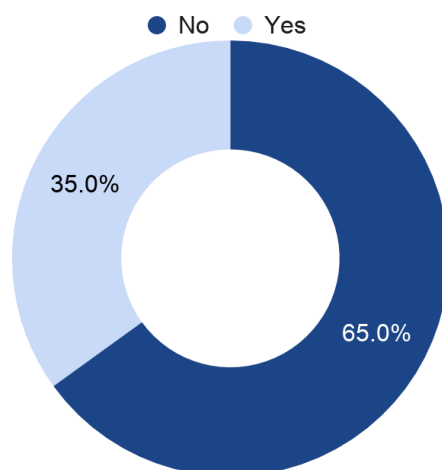


Chart 31. Distribution of respondents' views on reopening Palawan to foreign tourists

Compared to the municipality breakdown for reopening to domestic tourists, there are even less municipalities with more than 50% of respondents agreeing to reopen Palawan to foreign tourists (See Table 13).

Reopening Palawan to Foreign Tourists	N	Yes	No
<i>Puerto Princesa City</i>	953	33%	67%
Narra	91	33%	67%
Coron	85	58%	42%
El Nido	76	45%	55%
Bataraza	70	31%	69%
Brooke's Point	70	33%	67%
San Vicente	68	38%	62%
Taytay	58	31%	69%
Aborlan	53	34%	66%
Roxas	53	28%	72%
Sofronio Española	40	23%	78%
Busuanga	37	49%	51%
Quezon	32	19%	81%
Rizal	24	21%	79%
Culion	13	46%	54%
Balabac	11	45%	55%
Cuyo	10	70%	30%
Dumaran	7	14%	86%
Araceli	6	17%	83%
Agutaya	5	60%	40%
Linapacan	3	33%	67%
Cagayancillo	1	100%	0%
Magsaysay	1	100%	0%
Kalayaan	0	0%	0%
Total	1767	35%	65%
Total Province (excl. PPC)	814	37%	63%

The total percentage may not total to 100% due to rounding up of the results.

Table 13. Distribution of respondents who agree or disagree with reopening Palawan to foreign tourists, by municipality

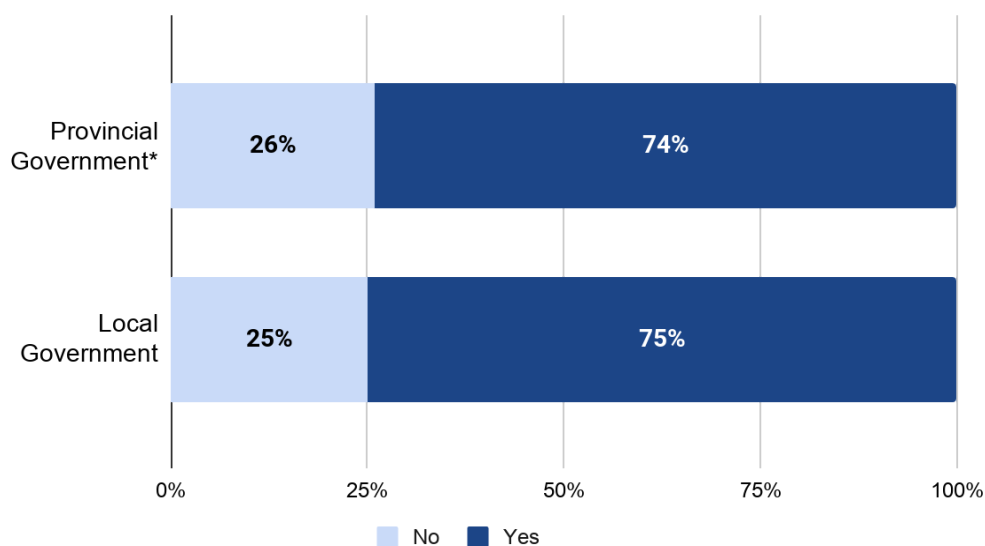
Among respondents from the province, the favorability of reopening to foreign tourists is slightly higher than for total respondents -- which includes respondents from Puerto Princesa City (37% vs. 35%).

Additional Information

Satisfaction with COVID-19 Response: Provincial and Local Government

3 out of 4 respondents are satisfied with the response of the provincial government (74%) and local government, in general (75%) to the effect of the COVID-19 pandemic in their respective locales (See Chart 32).

Satisfaction with COVID-19 pandemic response



*Excludes Puerto Princesa respondents

Chart 32. Respondents' satisfaction with the pandemic response of the provincial and local governments

All municipalities (except Kalayaan where no respondent answered the survey) have a favorable view of the provincial government's COVID-19 response. Among the municipalities with more than 30 respondents, the provincial government had the highest satisfaction rating in Taytay (81%), while El Nido registered the lowest (59%).

COVID-19 Response Satisfaction - Provincial government*	N	Yes	No
Narra	91	71%	29%
Coron	85	80%	20%
El Nido	76	59%	41%
Brooke's Point	70	76%	24%
Bataraza	70	73%	27%
San Vicente	68	74%	26%
Taytay	58	81%	19%
Aborlan	53	74%	26%

Roxas	53	72%	28%
Sofronio Española	40	75%	25%
Busuanga	37	76%	24%
Quezon	32	78%	22%
Rizal	24	79%	21%
Culion	13	69%	31%
Balabac	11	73%	27%
Cuyo	10	90%	10%
Dumaran	7	71%	29%
Araceli	6	83%	17%
Agutaya	5	80%	20%
Linapacan	3	100%	0%
Cagayancillo	1	100%	0%
Magsaysay	1	100%	0%
Kalayaan	0	0%	0%
Total Province**	814	74%	26%

*The total percentage per row may not total to 100% due to rounding up of the results.

**Excludes Puerto Princesa respondents

Table 14. Distribution of respondents' satisfaction with the provincial government's COVID-19 response, by municipality

Local governments from all municipalities received a more than majority satisfaction rating on its COVID-19 response. Among the municipalities with more than 30 respondents, the municipalities of Taytay and El Nido registered the highest (84%) and lowest (62%) ratings, respectively (See Table 15).

COVID-19 Response Satisfaction - Local government*	N	Yes	No
<i>Puerto Princesa City</i>	953	73%	27%
Narra	91	73%	27%
Coron	85	74%	26%
El Nido	76	62%	38%
Bataraza	70	79%	21%
Brooke's Point	70	79%	21%
San Vicente	68	78%	22%
Taytay	58	84%	16%
Aborlan	53	79%	21%
Roxas	53	66%	34%

Sofronio Española	40	78%	23%
Busuanga	37	81%	19%
Quezon	32	81%	19%
Rizal	24	71%	29%
Culion	13	92%	8%
Balabac	11	73%	27%
Cuyo	10	100%	0%
Dumaran	7	71%	29%
Araceli	6	83%	17%
Agutaya	5	80%	20%
Linapacan	3	100%	0%
Cagayancillo	1	100%	0%
Magsaysay	1	100%	0%
Kalayaan	0	0%	0%
Total	1767	75%	25%
Total Province**	814	76%	24%

*The total percentage per row may not total to 100% due to rounding up of the results.

**Excludes Puerto Princesa respondents

Table 15. Distribution of respondents' satisfaction with their respective local governments' COVID-19 response, by municipality