

This fact sheet provides a summary of the latest tourism data for Indonesian visitors to Victoria. Information includes: visitor numbers, purpose of visit, expenditure, visitor forecasts, Melbourne visitation, demographics, visitor behaviour, airline used, travel style, information sources and booking methods.

I OVERVIEW OF INDONESIAN VISITORS TO AUSTRALIA

I.1 Trends

Total Visitation from Indonesia to Australia, 2000-2010

Year Ending							Av Annual	Av Annual	
	2000	2006	2007	2008	2009	2010	% change	% Change	% change
December	2000	2006	2007	2008	2009	2010	2000-2010	2006-2010	09-10
Visitors (000s)	89	75	81	85	97	112	2.4%	10.4%	15.4%
Visitor Nights (000s)	3,505	3,419	3,373	3,574	3,886	4,966	3.5%	9.8%	27.8%
Average Length of Stay	39.6	45.4	41.9	41.9	40.0	44.4			

Indonesia generated 112,000 visitors to Australia in the year ending December 2010. The number of visitors from Indonesia coming to Australia has increased at a rate of 2.4% per annum over the period 2000-2010. In 2010, Indonesian visitors to Australia spent 5.0 million nights in Australia, a 27.8% increase from the previous year. Visitor nights have grown at a rate of 3.5% per annum between 2000 and 2010. The average length of stay in Australia by Indonesian visitors was 44.4 nights in 2010.

I.2 Main Purpose of Trip

Visitation from Indonesia to Australia by Purpose of Trip, 2000-2010

Year Ending							Av Annual	Av Annual	
	2000	2006	2007	2008	2009	2010	% change	% Change	% change
December	2000	2006	2007	2008	2009	2010	2000-2010	2006-2010	09-10
Holiday	40	29	29	31	40	47	1.8%	12.7%	19.7%
Visiting friends and relatives	15	14	14	15	18	20	3.3%	10.4%	13.2%
Business	11	11	14	14	14	16	3.7%	9.3%	15.8%
Education	16	17	15	16	18	20	2.4%	4.5%	12.2%
Other	7	-	9	9	8	8	1.2%	-	4.9%

NB: Where there is a '-', figures are unreliable and are unable to be published.

47,000 visitors came to Australia from Indonesia in 2010 for a holiday, an increase of 19.7% from the previous year. 20,000 Indonesian visitors came to Australia to visit friends and relatives (VFR), an increase of 13.2% from the previous year. VFR and holiday visitation have increased at an annual average rate of 3.3% and 1.8% respectively over the period 2000 to 2010.

The business travel sector has increased by 15.8% during 2010 compared to the previous year to reach 16,000 visitors. This represents an average annual growth rate of 3.7% during the period from 2000 to 2010. The education sector has increased from 18,000 in 2009 to 20,000 in 2010 (+12.2%).

I.3 States/Territories Visited

Indonesian Overnight Visitation to Australia by State/Territory, 2000-2010

Year Ending							Av Annual	Av Annual		
	December	2000	2006	2007	2008	2009	2010	% change 2000-2010	% Change 2006-2010	% change 09-10
Australia		89	75	81	85	97	112	2.4%	10.4%	15.4%
New South Wales		42	28	33	37	43	50	1.7%	15.2%	15.1%
Victoria		22	22	26	30	37	38	5.6%	14.1%	4.3%
Queensland		14	11	13	14	16	18	2.2%	12.7%	13.3%
South Australia		-	-	-	-	-	6	-	-	-
Western Australia		25	19	19	20	23	26	0.6%	8.2%	17.4%
Other States & Territories		-	8	7	6	6	9	-	3.2%	35.4%

NB: Where there is a '-', figures are unreliable and are unable to be published.

There were 38,000 Indonesian overnight visitors to Victoria in 2010, a 4.3% increase over the previous year. Indonesian visitation to Victoria has increased by an average rate of 5.6% per annum since 2000 above the national average (2.4% p.a.). Victoria also outperformed the long-term growth rates of key competitors New South Wales (+1.7% p.a.) and Queensland (+2.2% p.a.).

Indonesian Visitor Nights (000s) in Australia by State/Territory, 2000-2010

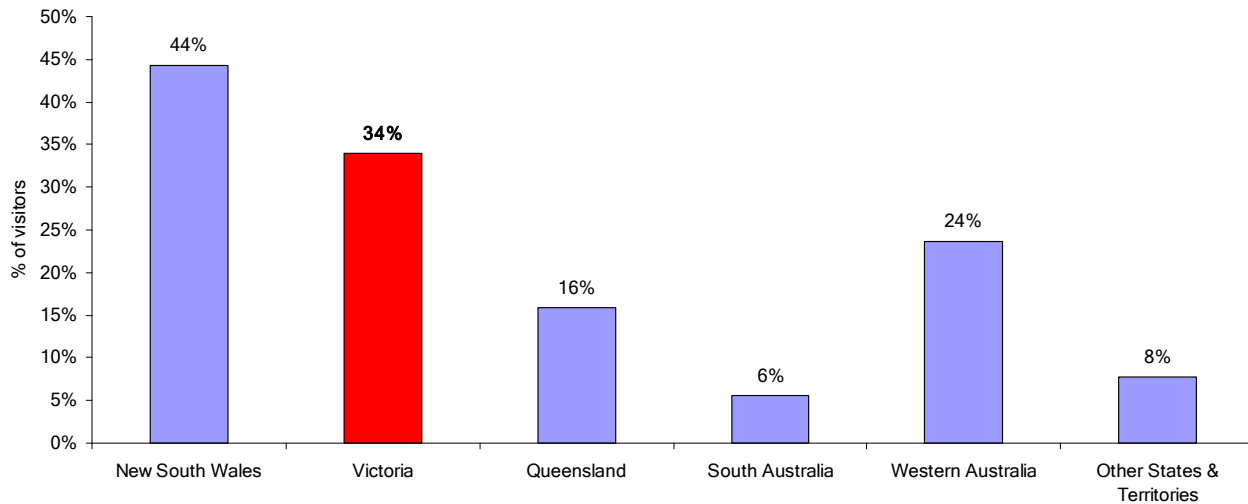
Year Ending							Av Annual	Av Annual		
	December	2000	2006	2007	2008	2009	2010	% change 2000-2010	% Change 2006-2010	% change 09-10
Australia		3,505	3,419	3,373	3,574	3,886	4,966	3.5%	9.8%	27.8%
New South Wales		1,582	1,248	1,239	1,278	1,280	1,713	0.8%	8.2%	33.8%
Victoria		558	1,078	1,018	1,322	1,258	1,476	10.2%	8.2%	17.3%
Western Australia		964	601	556	523	678	625	-4.2%	1.0%	-7.7%
Other States & Territories		-	-	560	-	670	1,152	-	-	72.0%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In 2010, the number of visitor nights spent in Victoria by Indonesian visitors increased by 17.3% from the previous year to approximately 1.5 million visitor nights. Visitor nights spent by Indonesian visitors in Victoria has grown by an average of 10.2% per annum since 2000.

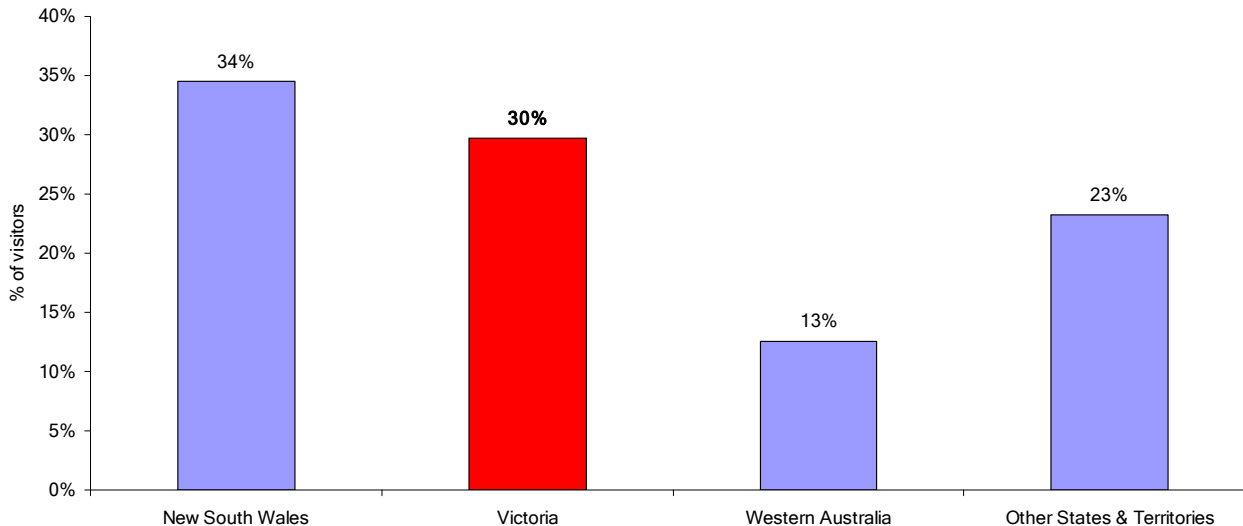
I.4 Market Share by State

Indonesian Overnight Visitors¹ to Australia, Year ending December 2010 – by State



34% of Indonesian visitors to Australia stayed overnight in Victoria compared to 44% in New South Wales.

Indonesian Visitor Nights to Australia, Year ending December 2010 – Market Share by State



Victoria's market share of visitor nights spent by Indonesian travellers in 2010 was 30%, four percentage points behind New South Wales (34%).

¹ NOTE: The proportion of Visitors to the States and Territories will not add up to 100% as visitors can travel to multiple destinations in one trip; while the proportion of Visitor Nights to the States and Territories will add to 100% as this measure is mutually exclusive.

1.5 Main Purpose of Visit – Visitors to Victoria

Indonesian Visitation (000s) to Victoria by Main Purpose of Visit, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	% change
							2000-2010	2006-2010	09-10
Holiday	9	9	9	11	17	18	6.9%	19.6%	8.0%
Visiting friends & relatives	-	-	-	5	6	-	-	-	-
Total Leisure	-	-	-	16	23	-	-	-	-
Education	-	7	6	7	7	9	-	6.2%	29.9%
Other (incl Business & Employment)	-	-	6	6	7	6	-	-	-6.2%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In 2010, there were 18,000 Indonesian overnight holiday visitors to Victoria, representing a 8.0% increase over the previous year and a 6.9% average annual increase from 2000 to 2010. Victoria also experienced a year-on-year increase in overnight education (+29.9%) visitors from Indonesia.

1.6 Melbourne Visitation

Indonesian Visitation (000s) to Melbourne, 2 years (rolling) ending 2000-2010

	2 Years Ending December						Av Annual	Av Annual	% change
	2000	2006	2007	2008	2009	2010	% change	% change	% change
	2000	2006	2007	2008	2009	2010	2000-2010	2006-2010	2009-2010
Melbourne	46	44	46	52	64	72	4.7%	13.4%	12.5%

There were 72,000 Indonesian overnight visitors to Melbourne in the two year period ending December 2010, a 12.5% increase over the previous period. Indonesian overnight visitation to Melbourne has grown at an annual average rate of 4.7% over the longer term (2000 to 2010).

Indonesian Visitor Nights (000s) in Melbourne, 2 years (rolling) ending 2000-2010

Campaign Regions	2 Years Ending December						Av Annual	Av Annual	% change
	2000	2006	2007	2008	2009	2010	% change	% change	% change
	2000	2006	2007	2008	2009	2010	2000-2010	2006-2010	2009-2010
Melbourne	1,415	2,044	1,988	2,163	2,436	2,622	6.4%	6.4%	7.7%

The number of visitor nights spent in Melbourne by Indonesian visitors increased by 7.7% from the previous period to 2.6 million visitor nights in the two year period ending December 2010. Between 2000 and 2010, visitor nights spent in Melbourne increased at an annual average rate of 6.4% p.a.

1.7 Visitor Expenditure

Expenditure by Indonesian Visitors	Total Expenditure					Expenditure Share			Expenditure Per Night			Expenditure Per Visitor			
	Nominal (\$ million)			Av Ann	% Change	%			\$			\$			
	Year Ending December	2000	2009	2010	00-10	% Change	09-10	2000	2009	2010	2000	2009	2010	2000	2009
New South Wales	np	131	163	np	24.4%		np	2.1%	2.6%	np	102	95	np	3045	3291
Victoria	np	166	164	np	-1.2%		np	4.4%	4.2%	np	132	111	np	4,548	4,307
Queensland	np	23	23	np	0.0%		np	0.6%	0.6%	np	67	65	np	1,467	1,294
Western Australia	np	74	79	np	6.8%		np	4.2%	4.1%	np	109	126	np	3,282	2,986
Australia	347	420	480	3.3%	14.3%		3.1%	2.5%	2.7%	99	108	97	3,912	4,329	4,288

np: denotes figures not published by TRA.

NB: Visitor expenditure includes expenditure on packages attributable to destination.

Source: Tourism Research Australia expenditure allocation method applied to 2000-2010 International Visitor Survey data.

Between 2000 and 2010, expenditure by Indonesian visitors in Australia increased at an annual average rate of 3.3% to reach \$480 million in 2010, representing 2.7% of total international expenditure in Australia. Expenditure in Victoria by Indonesian visitors reached \$164 million in 2010, representing a 4.2% share of total international expenditure for the state.

1.8 Visitor Forecasts to Victoria

Indonesian Forecasts	2010	ACTUAL 2010	FORECAST										Ave Annual Growth Rate (2009 - 2020)
	Vic Mkt Share		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	
Visitor Numbers (000s)	34%	38	47	50	53	57	60	64	67	71	75	79	7.2%
Visitor Nights (000s)	30%	1,476	1,641	1,770	1,903	2,034	2,174	2,322	2,478	2,645	2,824	3,008	8.2%

Note 1: Based on visitors aged 15 years or over.

Note 2: Victorian estimates based on market share of visitor nights (IVS, year ending December 2010) and assumes market share remains constant.

Note 3: Slight variations in calculations are due to rounding.

Sources: Tourism Forecasting Committee, November 2010 Issue 2 and *International Visitor Survey*, year ending December 2010, Tourism Research Australia

Average annual growth for arrivals from Indonesia is forecast at 7.2% over the period 2009-2020. Victoria is expected to receive 79,000 visitors from Indonesia by 2020.

This forecast growth is fuelled by significant increases in aviation capacity and the availability of cheaper fares from Indonesia to Australia. The increase in capacity has been largely driven by demand from Australian residents travelling outbound, particularly to Bali (Denpasar). This increase in capacity, coupled with rising household incomes in Indonesia is predicted to boost arrivals to Australia over the medium term.

Source: Tourism Forecasting Committee Forecast 2010 Issue 1, June 2010.

For more detailed information on tourism forecasting, market performance and economic commentary, please refer to the source at:

<http://www.ret.gov.au/tourism/tra/traforecasts/publications/Pages/default.aspx>

2 OVERVIEW OF INDONESIAN LEISURE VISITORS TO VICTORIA

The main focus of this analysis will be on overnight leisure travellers from Indonesia to Australia. Leisure travellers are those who travelled for holiday purposes or to visit friends and relatives (VFR). Due to low sample sizes, detailed analysis for visitation to Victoria could not be undertaken.

Indonesian Visitation to Victoria for Leisure, 2000-2010

Year Ending							Av Annual	Av Annual		
	December	2000	2006	2007	2008	2009	2010	% change 2000-2010	% Change 2006-2010	% change 09-10
Visitors to Victoria (000s)	13	13	13	16	23	23	23	6.3%	15.2%	-0.1%
Visitors to Australia (000s)	54	43	43	46	57	68	68	2.2%	12.0%	17.7%
% Market Share	23%	31%	31%	35%	41%	34%	34%	4.0%	2.9%	-15.1%

23,000 Indonesian leisure visitors stayed overnight in Victoria in 2010, a slight decrease of 0.1% from the previous year. Victoria has experienced growth from this market for the period 2000-2010, increasing at an average annual rate of 6.3%.

Indonesian 'Experience Seekers' – Proportion by State/ Territory, 2007-2010

Tourism Australia defines the Experience Seekers as "looking for unique, involving and personal experiences from their holidays. Experience Seekers are long haul travellers who are less affected by the traditional barriers to travel of distance, time and cost. They are more informed, interested and curious about potential travel destinations. Experience Seekers can be found among all age groups, income levels and geographic locations."

Year ending					
	December	2007	2008	2009	2010
Total		39%	40%	36%	42%
New South Wales		42%	34%	31%	32%
Victoria		29%	40%	42%	44%
Queensland		49%	39%	31%	30%
South Australia		30%	33%	34%	23%
Western Australia		38%	41%	36%	45%
Tasmania		79%	90%	96%	100%
Northern Territory		13%	n/a	26%	n/a
Australian Capital Territory		44%	43%	62%	72%

Of Indonesian overnight leisure visitors to Victoria, 44% can be defined as part of the Tourism Australia "Experience Seekers" segment in 2010. This was higher than the proportion of Indonesian leisure travellers to Australia generally (42%), and also for key competitors New South Wales (32%) and Queensland (both 30%). Over time, this proportion has increased 15 percentage points, from 29% of overnight visitors to Victoria in 2007.

For more detailed information on the Experience Seekers segment, please refer to:

<http://www.tourism.australia.com/en-au/marketing/experience-seekers.aspx>

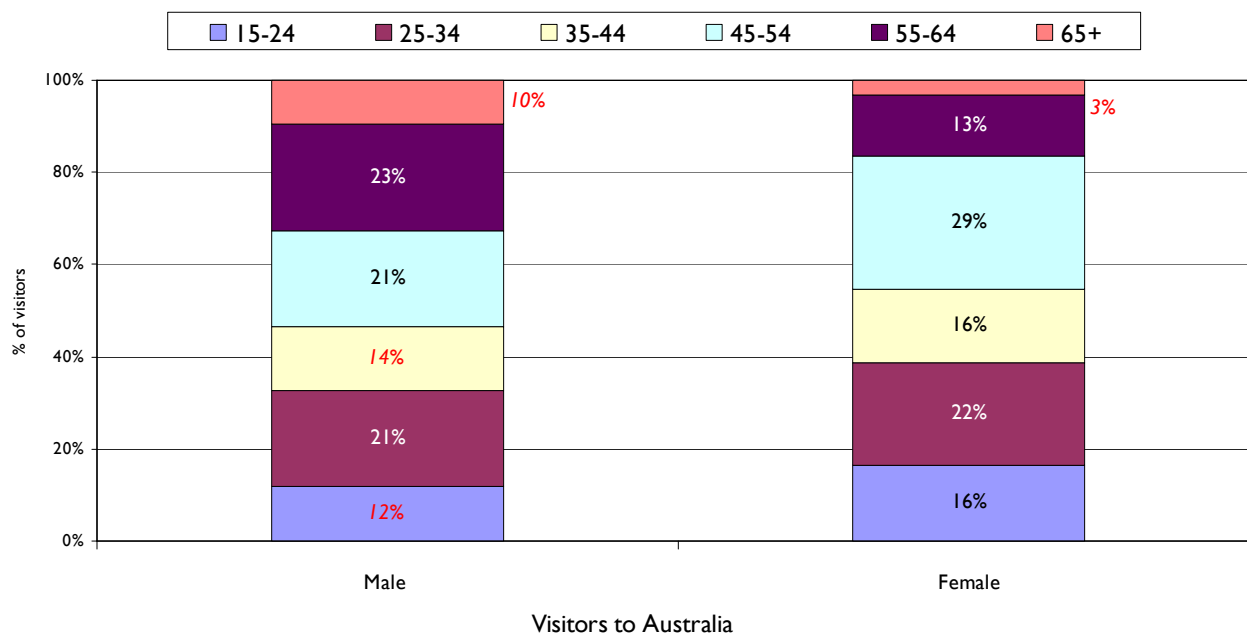
2.1 Melbourne Attractions Visited

Selected Places Visited - Melbourne Attractions (% of Leisure Overnight Visitors to Victoria)	All	
	Indonesian Visitors	International Visitors
Crown Casino/entertainment complex	52%	33%
Federation Square	37%	50%
Queen Victoria Market	58%	51%
Southbank/Southgate	27%	31%
Melbourne Museum (Royal Exhibition Building)	-	23%
Docklands/Telstra Dome	-	28%
National Gallery of Victoria (NGV)	-	17%
Melbourne Cricket Ground (MCG)	-	11%

Of the Melbourne attractions visited 58% of Indonesian overnight leisure visitors to Victoria went to the Queen Victoria Market, while 52% went to Crown Casino and/or Crown Entertainment Complex and 37% to Federation Square. The highest result for all the listed Melbourne Attractions for international overnight visitors to Victoria generally was the Queen Victoria Markets (51% of overnight international leisure visitors to Victoria).

2.2 Demographic Profiling

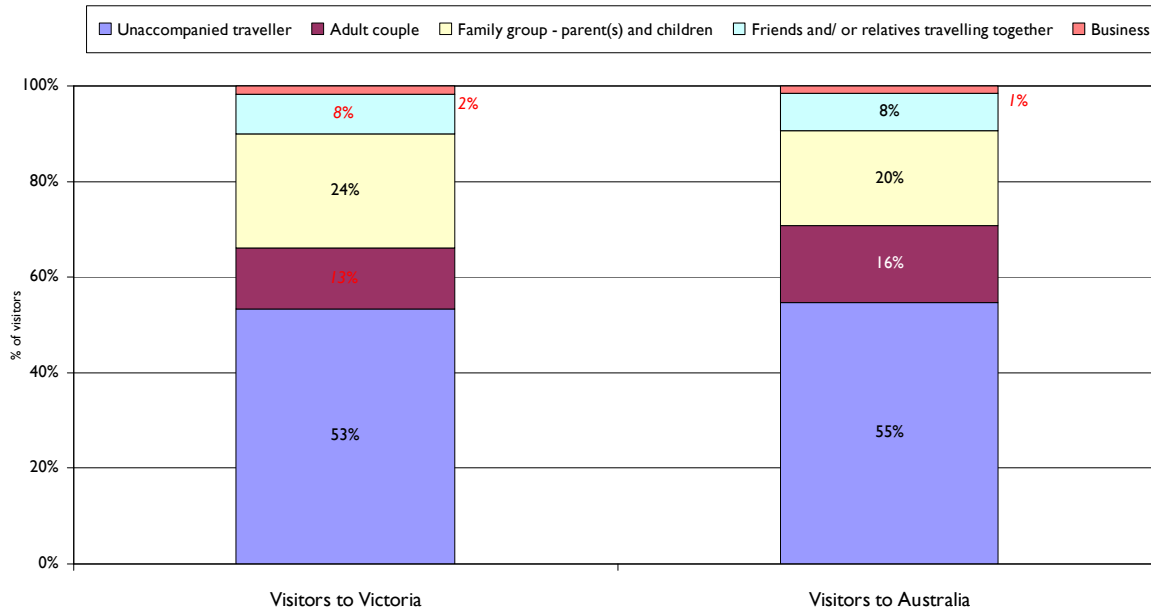
Age Group & Gender (% of overnight leisure visitors from Indonesia)



In 2010, overnight leisure visitors from Indonesia to Australia were more likely to be females (58%) than males (42%). The largest proportion of male visitors belonged to the 55-64 (23%), followed by 45-54 (21%) and 25-34 (21%) age groups. The largest proportion of females belonged to the 45-54 age group (29%), followed by the 25-34 year old age group (22%).

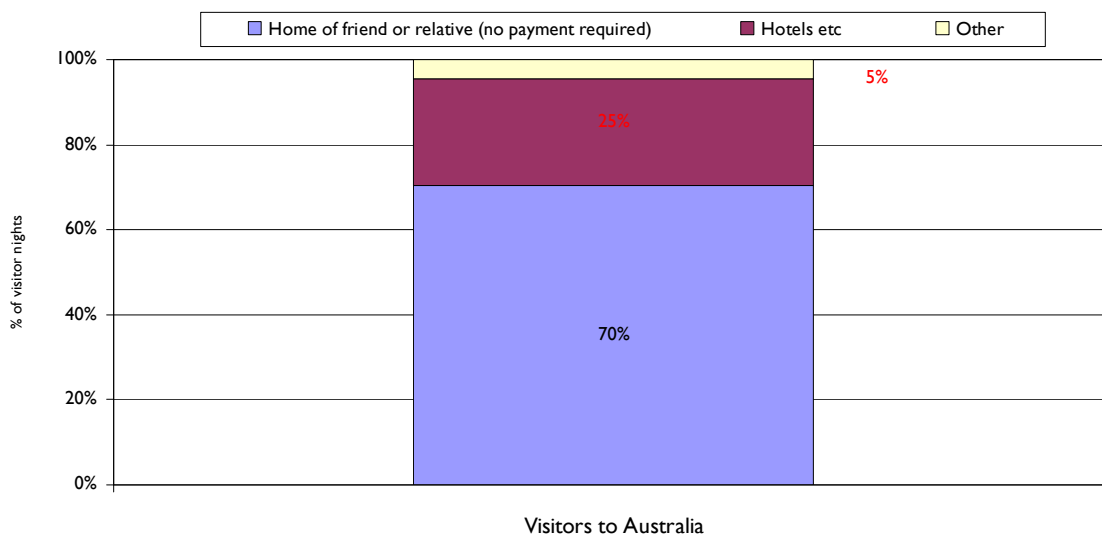
2.3 Detailed Visitor Behaviour

Travel Party Description (% of overnight leisure visitors from Indonesia)



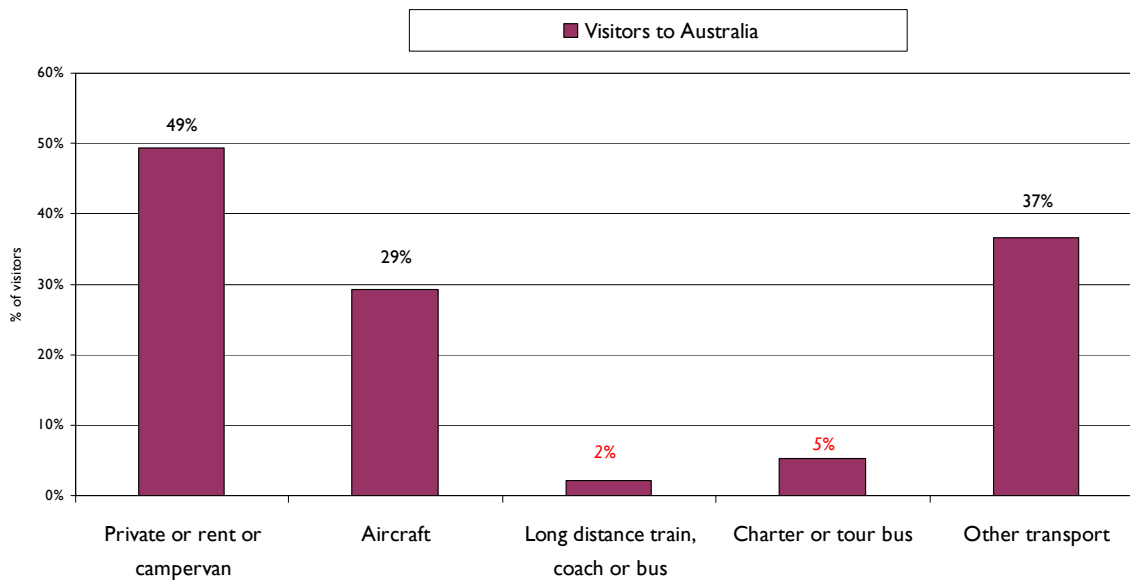
Over half of the overnight leisure travellers visiting Australia from Indonesia in 2010 travelled alone (55%). Travelling as a family group (20%) was the second largest travel party type among Indonesian travellers.

Accommodation (% of visitor nights spent by Indonesian leisure visitors)



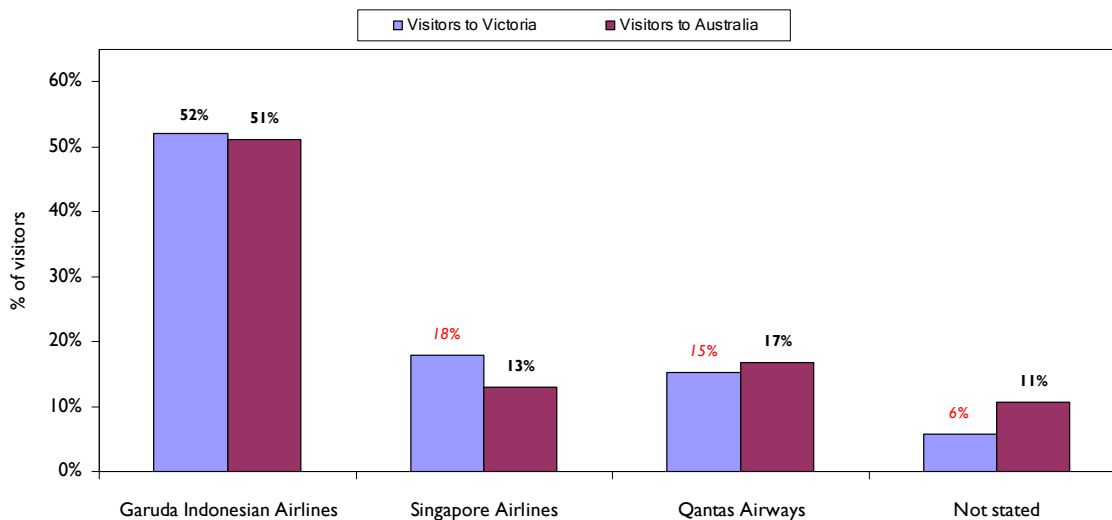
In 2010, 70% of all visitor nights spent in Australia by Indonesian leisure visitors were spent at the home of a friend or relative.

Transportation used (% of leisure visitors from Indonesia)



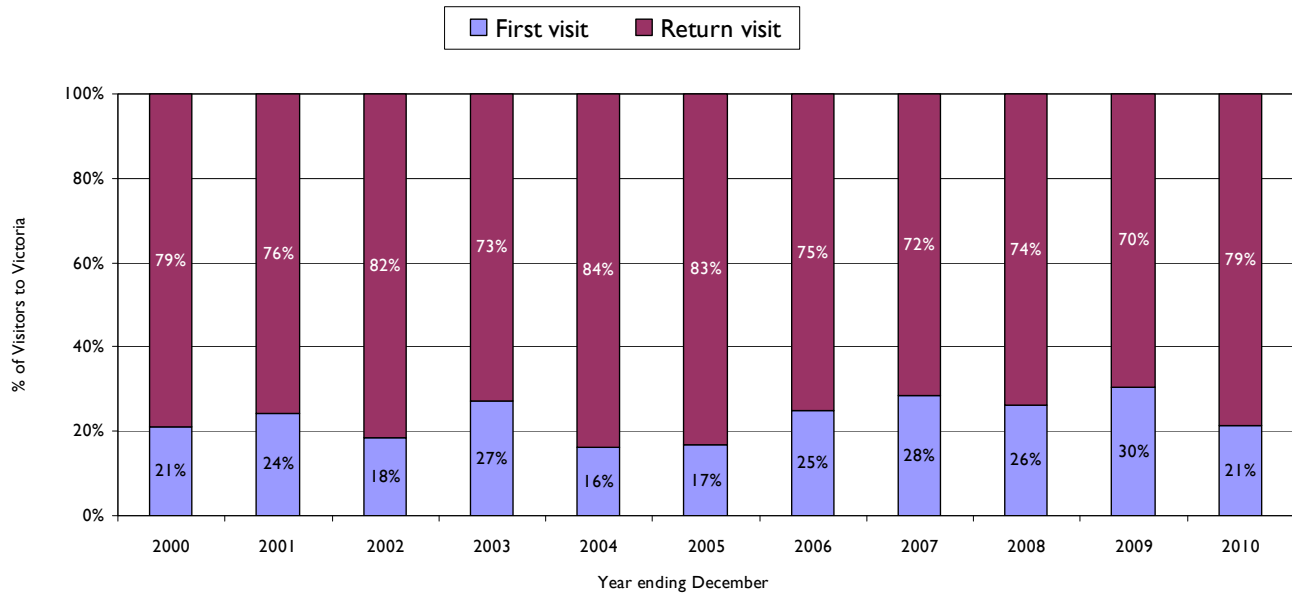
Of the 68,000 Indonesian leisure visitors to Australia in 2010, 49% used a private or rental car, campervan or motor-home and 29% used an aircraft on their trip, while 37% used other forms of transport such as public transport or a ship/boat/ferry.

Departure airline used (% of overnight leisure visitors from Indonesia)



Of overnight leisure visitors to Victoria from Indonesia in 2010 the most popular airline used was Garuda Indonesian Airlines (52%) when departing Australia following their holiday. Leisure visitors to Australia from the market were also most likely to use Garuda Indonesian Airlines (51%) followed by Qantas Airlines (17%).

Repeat Visitation in Victoria (% of leisure visitors from Indonesia)

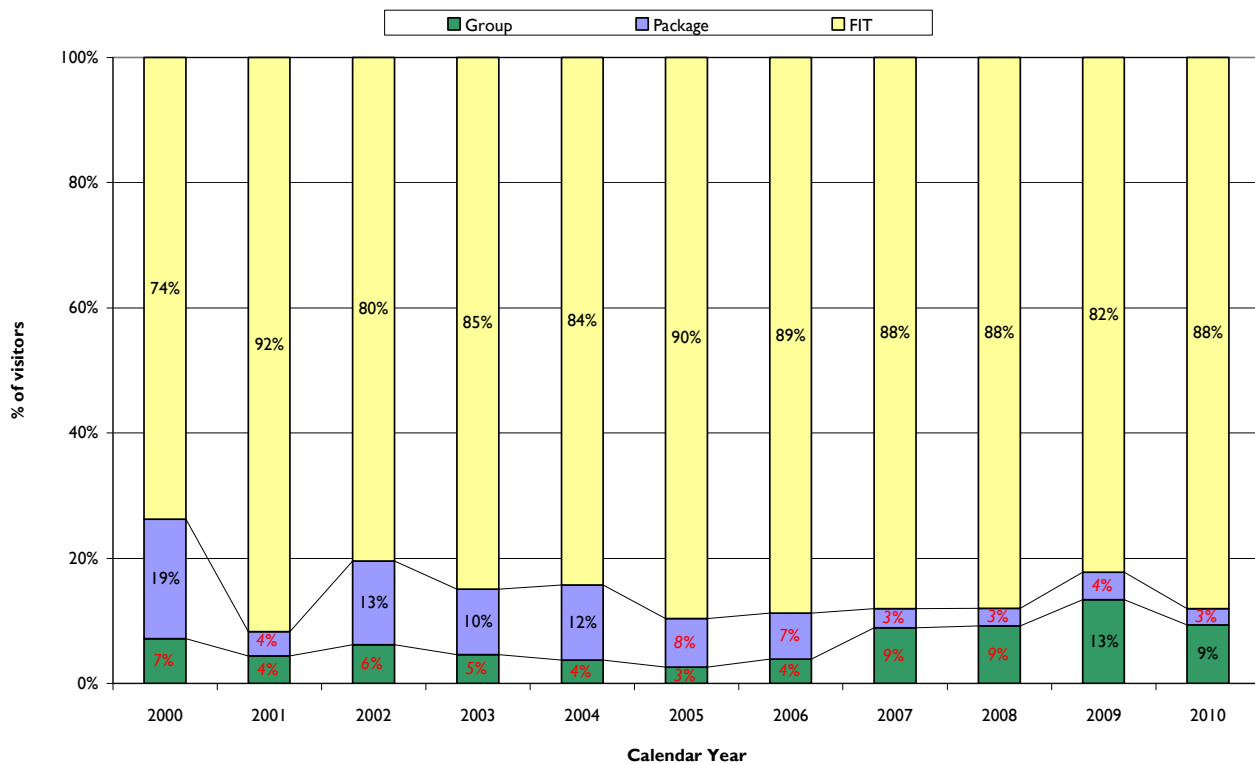


The Indonesia overnight leisure travel market is a relatively mature one. In 2010, the proportion of visitors from Indonesia to Australia who were visiting for the first time was 21%.

3 TRAVEL STYLE

3.1 Group, package & Fully Independent Travel (FIT) travel

Trends in Group, Package and FIT travel among Indonesian leisure visitors to Australia, 2000-2010



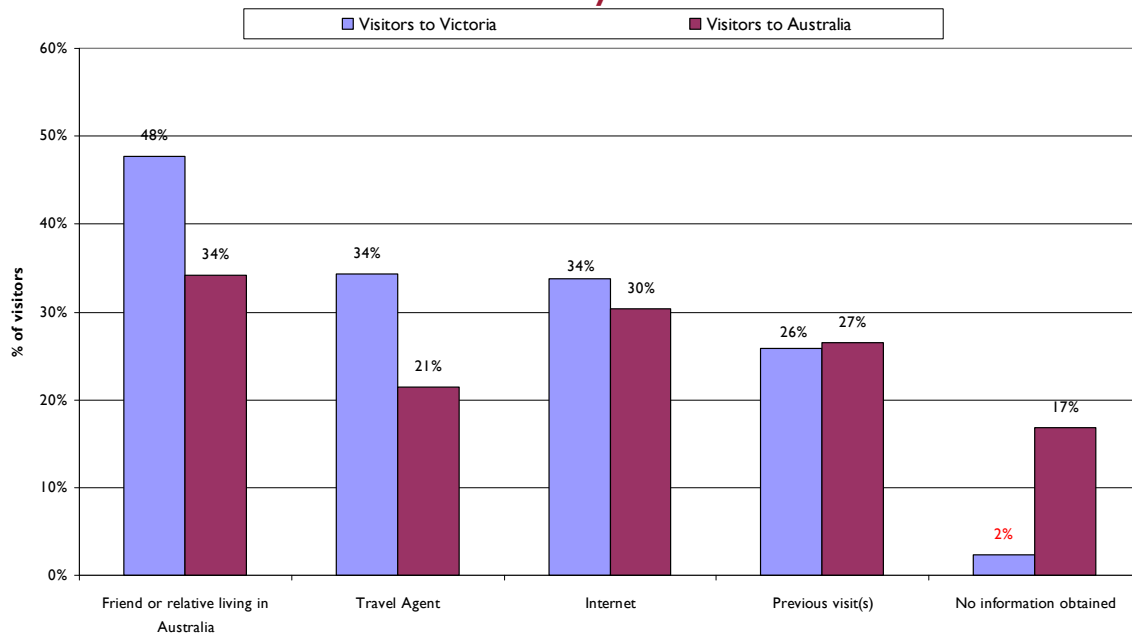
In 2010, 88% of Indonesian leisure visitors were classified as FIT travellers. Group travellers comprised of 9% of Indonesian leisure visitors in 2010.

* NOTE: Group, Package and FIT are derived using the following method.

'Group' travellers refer to those who responded yes to question "Did you travel to Australia on a group tour?". 'Package' travellers refer to those who responded yes to question "Did you arrive in Australia on a travel package?" (minus 'Group' travellers). The remaining travellers who were not 'group' or 'package' are referred to as 'FIT' travellers.

4 INFORMATION SOURCES & BOOKING METHODS

4.1 Information Sources Information Sources by Indonesian Leisure Visitors to Australia, 2010



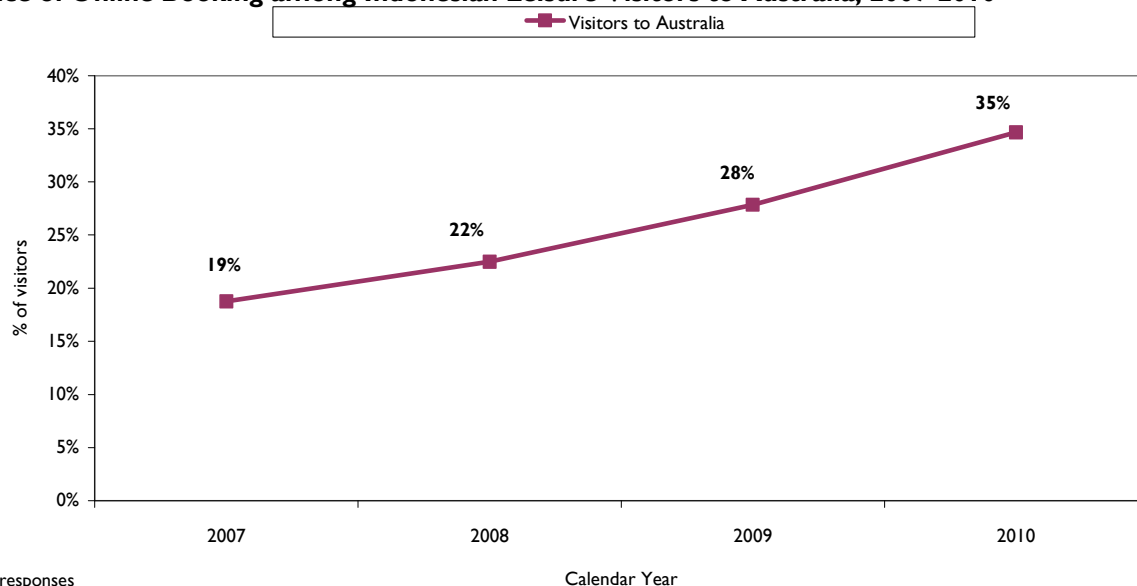
Base: Valid responses

NB: Information Sources with a value below 2% have been omitted.

Among Indonesian overnight leisure visitors to Australia in 2010, the leading information source used was a friend or relative living in Australia (34%) followed by the internet (30%). For overnight visitors to Victoria, referrals from an Australian resident were also the leading information source (48%), followed by the internet and travel agent (both at 34%).

4.2 Internet Booking

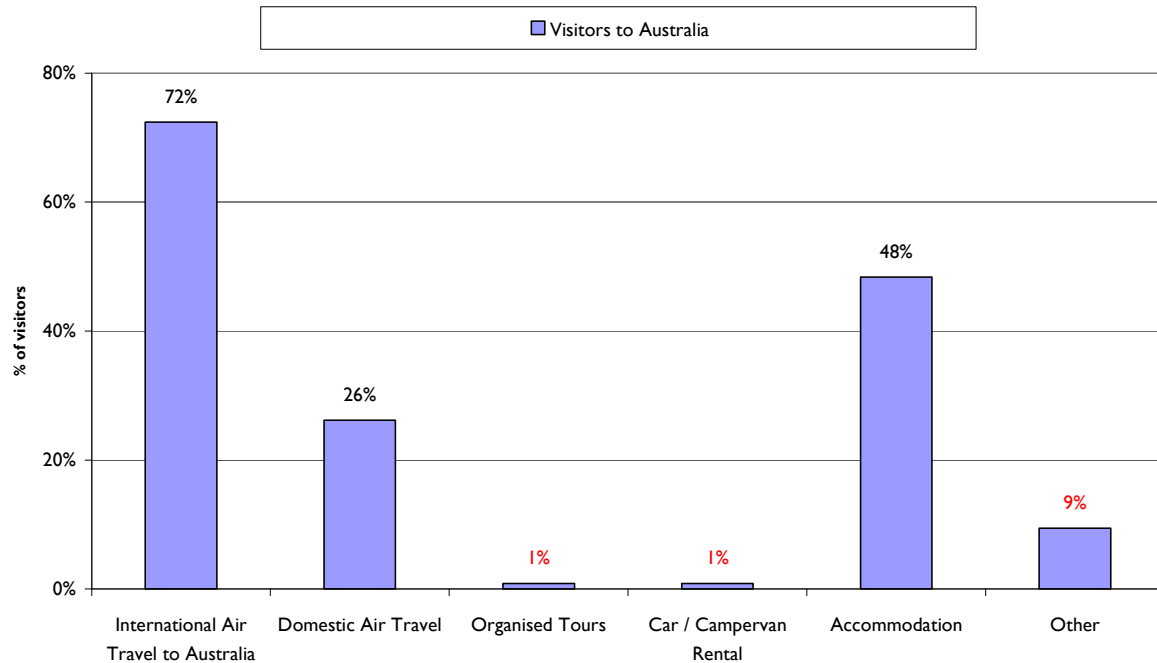
Incidence of Online Booking among Indonesian Leisure Visitors to Australia, 2007-2010



Base: Valid responses

The incidence of online booking among Indonesian overnight leisure visitors to Australia in 2010 was 35%, a substantial increase since 2007 (19%).

Trip Components Booked Online among Indonesian Overnight Leisure Visitors to Australia, 2010



Base: Booked online

Among the 35% of Indonesians who booked online in 2010, international air travel to Australia (72%) followed by accommodation (48%) were the most common components booked online.

4.3 Planning and Booking Horizons, 2010

	Visitors to Australia
Planning Horizon (average weeks)	8.1
Booking Horizon (average weeks)	5.4

Among leisure visitors to Australia from Indonesia, the average planning horizon was 8.1 weeks. However, 51% of visitors to Australia indicated a lead time of less than 4 weeks for planning.

Flight booking occurred an average of 5.4 weeks prior to departure. 67% of flight bookings to Australia occurred within a month of departure.

Sources:

- *International Visitor Survey*, year ending December 2000-2010, Tourism Research Australia
- *International Tourism Expenditure in Australia's regions 2000-2010*, Tourism Research Australia
- Tourism Forecasting Committee Forecast 2010: Issue 1 (June 2010) and Issue 2 (November 2010).
- Tourism Australia Corporate Website: <http://www.tourism.australia.com/en-au/marketing/experience-seekers.aspx>, February 2010.

Further information: www.tourism.australia.com/Markets.asp
www.tourism.vic.gov.au/facts-and-figures/

Figures that are unreliable and unable to be published are represented by '-'. Percentages in red italics are unreliable and should be used with caution.

Figures might not add up due to rounding.