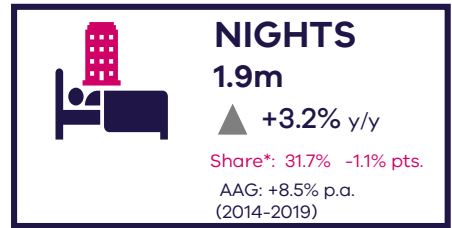
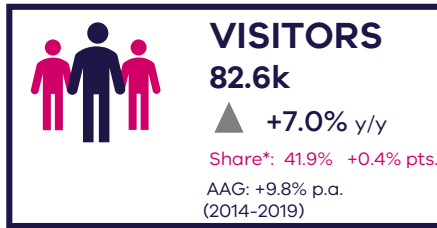
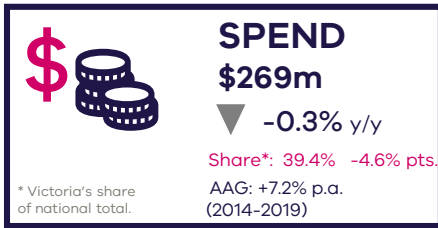


International Tourism Summary: Indonesia

Year ending December 2019

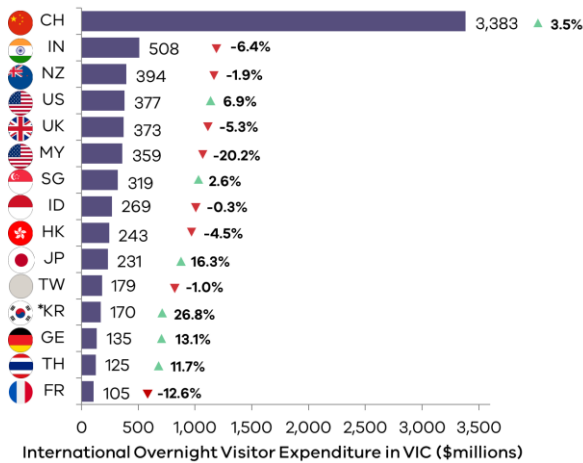


82,600 Indonesian visitors spent 1.9 million nights and \$269 million on trips to Victoria in the year ending December 2019.

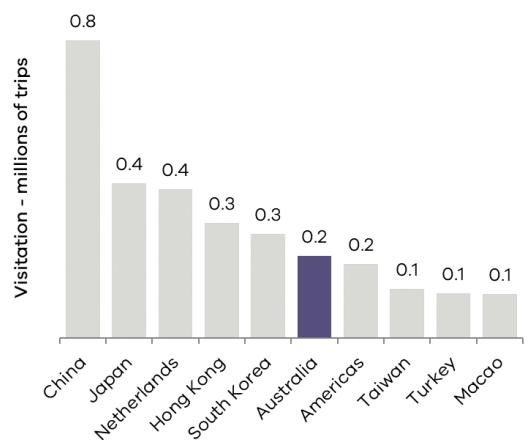


Context: In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

International Overnight Expenditure in Victoria (\$m)



Top 10 Out-of-Region Destinations for Indonesian Travellers



Indonesian visitors spent \$269 million on trips to Victoria in the year ending December 2019, a year-on-year decline of 0.3 per cent. This represents 3.0 per cent of all international overnight visitor spend in Victoria. Indonesia is ranked Victoria's 8th largest international market in terms of expenditure.

Australia was ranked #6 for visitation against other out-of-region destinations for Indonesian travellers in the year ending December 2019 (no change from the previous year).

Source: Tourism Economics, YE2019

* In the year ending December 2019, all Korean visitors to Australia were from South Korea.

AUSTRALIA



\$683m Spend ▲ +11.3%
197k Visitors ▲ +5.9%
6.1m Nights ▲ +6.9%

NEW SOUTH WALES



\$223m Spend ▲ +13.2%
89k Visitors ▲ +3.0%
1.9m Nights ▼ -15.9%

QUEENSLAND



\$61m Spend ▲ +48.9%
29k Visitors ▲ +45.9%
822k Nights ▲ +98.4%

The marginal decline of Indonesian expenditure on trips to Victoria (-0.3% year-on-year) was in contrast to the growth in the national average (+11.3%), New South Wales (+13.2%) and Queensland (+48.9%).

MELBOURNE



\$253m Spend ▼ -5.4%
77k Visitors ▲ +1.6%
1.7m Nights ▼ -9.2%

REGIONAL VICTORIA



np
 np
 np

In the year ending December 2019, 77,000 Indonesian visitors spent 1.7 million nights and \$253 million on trips to Melbourne. Figures for regional Victoria are below reliable and publishable thresholds.

np = non-publishable (figures are below reliable and publishable thresholds)

Indonesian Spend, Visitors and Nights by Key States Visited

Victoria's Market Share of Indonesian spend, visitors and nights



Indonesian Overnight Expenditure in Australia by Key States, 2014-2019

Expenditure by Visitors from Indonesia Year Ending December	Total Expenditure (\$ million)				Share of National %			Expenditure Per Night \$			Expenditure Per Visitor \$			
	2014	2018	2019	Av Ann 14-19	% Change 18-19	2014	2018	2019	2014	2018	2019	2014	2018	2019
New South Wales	141	197	223	9.6% p.a.	13.2%	29.9%	32.2%	32.7%	95	89	119	2,300	2,280	2,507
Victoria	190	270	269	7.2% p.a.	-0.3%	40.3%	44.1%	39.4%	148	145	140	3,666	3,497	3,258
Queensland	32	41	61	13.9% p.a.	48.9%	6.8%	6.7%	9.0%	71	99	74	1,751	2,061	2,103
Australia	472	613	683	7.7% p.a.	11.3%				103	108	113	3,374	3,291	3,460

Total VIC International Expenditure	4,903	8,467	8,826	12.5% p.a.	4.2%
Indonesia's Share of VIC International Expenditure	3.9%	3.2%	3.0%		

AAG = Average Annual Growth

NB: Visitor expenditure includes expenditure on packages attributable to destination. Estimates may differ from those published by Tourism Australia

Source: Regional Expenditure Model, International Visitor Survey, December 2014-2019, Tourism Research Australia, Canberra.

Victoria received 39.4 per cent of Indonesian overnight visitors' expenditure in Australia in the year ending December 2019, ahead of New South Wales (32.7%) and Queensland (9.0%). Indonesian visitors' expenditure per night in Victoria (\$140) was higher than the national average (\$113), New South Wales (\$119) and Queensland (\$74). Victoria received a higher total spend per visitor (\$3,258) than New South Wales (\$2,507) and Queensland (\$2,103).

Indonesian Overnight Visitation (000s) to Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual		Share of Visitors %
							% change 14/19	% change 18/19	
Australia	140	142	162	174	186	197	7.1% p.a.	5.9%	
New South Wales	61	61	71	79	87	89	7.7% p.a.	3.0%	45%
Victoria	52	53	64	71	77	83	9.8% p.a.	7.0%	42%
Queensland	18	20	24	22	20	29	9.8% p.a.	45.9%	15%

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

The year-on-year increase in Indonesian overnight visitor numbers to Victoria (+7.0%) was ahead of the national average (+5.9%) and New South Wales (+3.0%), but behind Queensland (+45.9%) in the year ending December 2019. Over the longer term (2014 to 2019), Indonesian overnight visitors to Victoria increased at an average annual rate of 9.8 per cent, ahead of the national average (+7.1% p.a.) and New South Wales (+7.7% p.a.) and in line with Queensland (+9.8% p.a.).

Indonesian Visitor Nights (000s) in Australia by Key States, 2014-2019

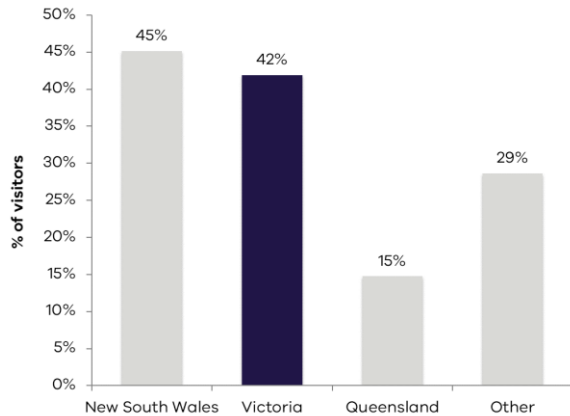
Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual		Share of Nights %
							% change 14/19	% change 18/19	
Australia	4,569	4,418	5,063	5,102	5,675	6,065	5.8% p.a.	6.9%	
New South Wales	1,492	1,503	2,049	1,737	2,225	1,872	4.6% p.a.	-15.9%	31%
Victoria	1,280	1,120	1,425	1,458	1,863	1,922	8.5% p.a.	3.2%	32%
Queensland	449	476	446	540	415	822	12.9% p.a.	98.4%	14%

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

In the year ending December 2019, Indonesian visitor nights to Victoria increased by 3.2 per cent year-on-year, behind the national average (+6.9%) and Queensland (+98.4%) but in contrast to the decline in New South Wales (-15.9%). Over the longer term (2014 to 2019), Indonesian visitor nights spent in Victoria increased at an average annual rate of 8.5 per cent, ahead of the national average (+5.8% p.a.) and New South Wales (+4.6% p.a.), but behind Queensland (+12.9% p.a.).

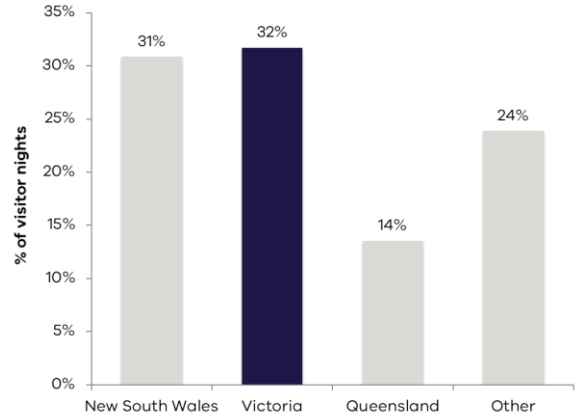
Market Share by Key States¹

Indonesian Overnight Visitors to Australia
Year ending December 2019 – Market Share by Key States



In the year ending December 2019, 42 per cent of Indonesian visitors to Australia stayed overnight in Victoria; ahead of Queensland (15%) but behind New South Wales (45%).

Indonesian Visitor Nights to Australia
Year ending December 2019 – Market Share by Key States



Victoria's market share of visitor nights spent by Indonesian travellers to Australia in the year ending December 2019 was 32 per cent; ahead of New South Wales (31%) and Queensland (14%).

Main Purpose of Trip (000s) to Australia by Key States Visited and Market Share

Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Education	Total
New South Wales	54	14	67	6	89
Market Share %	49%	32%	44%	41%	45%
Victoria	52	17	69	7	83
Market Share %	47%	41%	45%	48%	42%
Queensland	17	6	23	-	29
Market Share %	16%	15%	15%	-	15%
Australia	109	43	152	16	197

* Total Leisure = Holiday + VFR

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

NB: Figures for 'Business', 'Employment' and 'Other' visitors are unreliable and are unable to be published

In the year ending December 2019, 45 per cent of Indonesian leisure visitors to Australia stayed overnight in Victoria, including 47 per cent of holiday and 41 per cent of visiting friends and relatives (VFR) visitors. New South Wales' share of Indonesian leisure visitors was slightly lower at 44 per cent, with Queensland's share also lower at 15 per cent. During the same period, Victoria's share of the Indonesian education visitor market was 48 per cent, ahead of New South Wales (41%).

Purpose of Visit to Victoria (and the Destinations Within)

Some international visitors to Victoria visit more than one destination in the state, and for different purposes. For example, a visitor might stay in Melbourne for education reasons, and visit the Great Ocean Road region for a holiday. As such, the percentages of international visitors who visited Victoria for each purpose total more than 100 per cent.

Indonesian Overnight Expenditure and Visitation to Victoria by Destination Purpose of Visit – Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Education	Total
Overnight Expenditure (\$M)	75	34	109	131	269
Overnight Visitors (000s)	49	23	68	6	83
Visitor Nights (000s)	495	387	882	790	1,922
Average Length of Stay	10.1	17.0	12.9	132.9	23.3
Spend per Visitor	1,543	1,489	1,600	21,958	3,258
Spend per Night	153	88	124	165	140

* Total Leisure = Holiday + VFR (NB total leisure may equal more than the sum of holiday + VFR, since visitors can visit more than one destination in Victoria with more than one purpose)

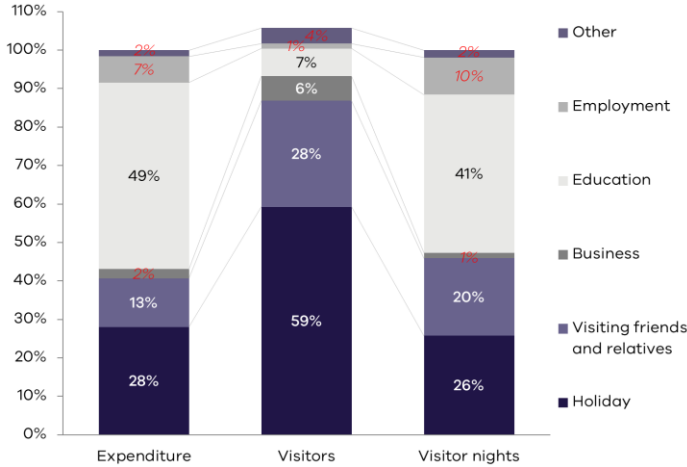
NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Business', 'Employment' and 'Other' visitors are unreliable and are unable to be published

¹NOTE: 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.

Indonesian Overnight Expenditure, Visitors and Nights to Victoria by Purpose of Visit

Year Ending December 2019



In the year ending December 2019, education visitors accounted for almost half (49%) of Indonesian visitor expenditure in Victoria. Indonesian leisure visitors accounted for 41 per cent of expenditure, comprising holiday visitor expenditure (28%) and VFR visitor expenditure (13%)*.

During the same period, 59 percent of Indonesian visitors travelled to Victoria for holiday purposes, 28 per cent travelled for VFR, seven per cent for education purposes and a further six per cent for business.

Forty-one per cent (41%) of all nights spent in Victoria by Indonesian visitors in the year ending December 2019 were accounted for by education visitors, while holiday visitors accounted for 26 per cent of visitor nights and VFR visitors for 20 per cent of nights.

*Figures might not add up due to rounding.

Note: Percentages of visitors will not add up to 100% as visitors can travel to multiple destinations in Victoria with different purposes.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

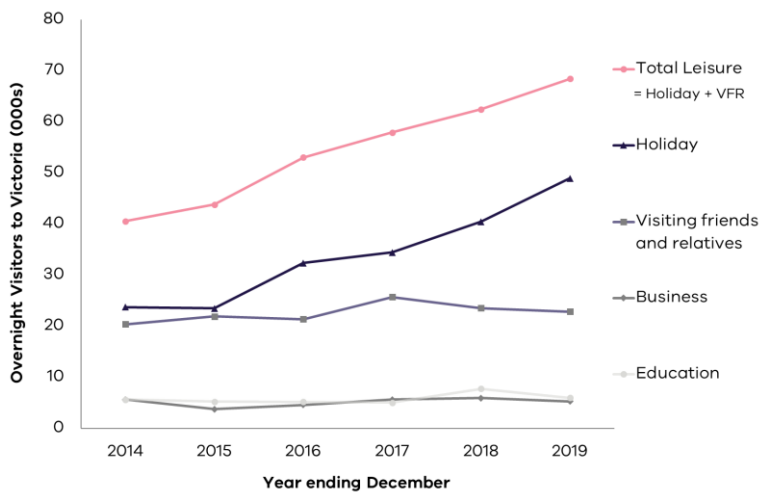
Indonesian Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Holiday	24	23	32	34	40	49	15.6% p.a.	21.0%
Visiting friends and relative	20	22	21	26	24	23	2.3% p.a.	-3.0%
Total Leisure	41	44	53	58	62	68	11.0% p.a.	9.6%
Business	6	-	-	6	6	5	-1.2% p.a.	-10.5%
Education	6	5	5	5	8	6	1.3% p.a.	-22.8%

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

NB: Figures for 'Employment' and 'Other' visitors are unreliable and are unable to be published

Indonesian Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019



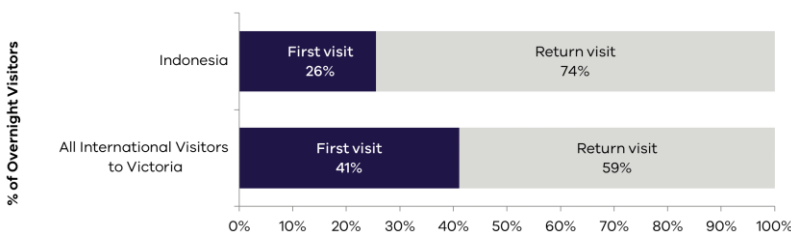
Of all the main purpose segments, the Indonesian holiday market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+15.6% p.a.), while VFR visitors have also increased (+2.3% p.a.).

Overall, overnight Indonesian leisure visitors to Victoria have increased at an average annual rate of 11.0 per cent per annum over the period 2014-2019.

Overnight Indonesian education visitors to Victoria have increased at an average rate of 1.3 per cent per annum since 2014, while Indonesian overnight business visitors have declined at an average annual rate of 1.2 per cent.

Repeat Visitation to Australia

Repeat Visitation to Australia (% of Indonesian overnight visitors to Victoria vs all international overnight visitors to Victoria)



In the year ending December 2019, 26 per cent of overnight visitors from Indonesia to Victoria were visiting Australia for the first time, compared with 41 per cent of international overnight visitors to Victoria overall.

Melbourne and Regional Victoria Overnight Visitation

Indonesian Overnight Visitation (000s) to Victoria, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual	% change
							14/19	18/19
Melbourne	50	52	61	70	76	77	9.0% p.a.	1.6%
Victoria	52	53	64	71	77	83	9.8% p.a.	7.0%

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

NB: Figures for Regional Victoria are unreliable and are unable to be published

There were 77,000 Indonesian overnight visitors to Melbourne in the year ending December 2019, a 1.6 per cent increase over the previous year. Indonesian visitors to Melbourne have grown at an average annual rate of 9.0 per cent over the period 2014 to 2019.

Indonesian Visitor Nights (000s) to Victoria, 2 years² (rolling), 2014-2019

2 Years Ending December	2014	2015	2016	2017	2018	2019	Av Annual	% change
							14/19	18/19
Melbourne	2,388	2,201	2,409	2,757	3,242	3,511	8.0% p.a.	8.3%
Regional Victoria	-	-	-	-	-	274	-	-
Victoria	2,539	2,400	2,545	2,883	3,321	3,786	8.3% p.a.	14.0%

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

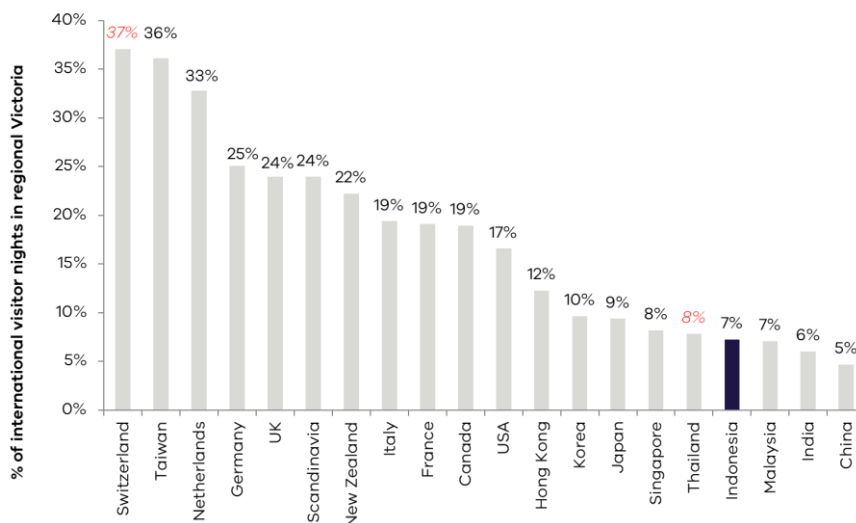
Indonesian visitors spent 3.5 million nights in Melbourne in the two years ending December 2019, an increase of 8.3 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum*), visitor nights spent in Melbourne increased at an average annual rate of 8.0 per cent.

In the two years ending December 2019, Indonesian visitors spent 274,000 nights in regional Victoria.

* where 2014 includes years ending December 2013 and 2014 and 2019 includes years ending December 2018 and 2019.

Regional Dispersal

Regional Dispersal of Top 20 International Overnight Markets to Victoria – 2 Years Ending December 2019



Of the 3.8 million nights spent in Victoria by Indonesian visitors in the two years ending December 2019, only seven per cent (274,000) of them were spent in regional Victoria.

Indonesian visitors to Victoria have the fourth lowest rate of overnight dispersal of all the state's top 20 international markets.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

² Two years of data are used to increase reliability of the figures.

Places Visited in Regional Victoria and Melbourne Attractions

Places Visited in Regional Victoria – Year Ending December 2019

Selected Places Visited - Overnight Visit or Daytrip (% of all Overnight Visitors to Victoria)	Indonesia Visitors	All International Visitors
Ballarat, Sovereign Hill	11%	6%
Bendigo	-	3%
Daylesford, Hepburn Springs, Mt. Macedon	-	1%
Geelong & the Bellarine Peninsula	9%	9%
Great Ocean Road/Twelve Apostles	16%	33%
Healesville Sanctuary	-	2%
Mornington Peninsula	10%	8%
Phillip Island/Penguin Parade	14%	17%
Puffing Billy and Dandenong Ranges	8%	10%
Victorian Snowfields	6%	2%
Wilson's Promontory	-	3%
Yarra Valley	20%	12%

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

In the year ending December 2019, 20 per cent of Indonesian overnight visitors to Victoria spent time (daytrip or overnight) in the Yarra Valley, compared with 12 per cent of international overnight visitors to Victoria overall. Sixteen per cent (16%) visited the Great Ocean Road/Twelve Apostles region, compared to 33 per cent of all international overnight visitors to Victoria.

Fourteen per cent (14%) of Indonesian overnight visitors to Victoria went to the Phillip Island/Penguin Parade area (compared with 17 per cent of international overnight visitors to Victoria overall), 11 per cent visited the Ballarat/Sovereign Hill area (compared with six per cent of international visitors overall) and 10 per cent of Indonesian overnight visitors to Victoria visited the Mornington Peninsula region (compared with eight per cent of international overnight visitors to Victoria overall).

Melbourne Attractions Visited – Year Ending December 2019

Selected Places Visited - Melbourne Attractions (% of Overnight Visitors to Victoria)	Indonesia Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	8%	4%
Brunswick Street	11%	10%
Chadstone Shopping Centre	25%	15%
Chapel Street	11%	9%
Crown Casino/entertainment complex	20%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	27%	19%
Federation Square	43%	38%
Melbourne CBD Shopping Precinct	79%	63%
Melbourne Cricket Ground (MCG)	-	6%
Melbourne Museum (Royal Exhibition Building)	19%	16%
Melbourne Zoo	-	8%
National Gallery of Victoria (NGV)	22%	17%
Queen Victoria Market	64%	44%
Shrine of Remembrance	20%	12%
Southbank/Southgate	38%	26%
St Kilda	35%	28%

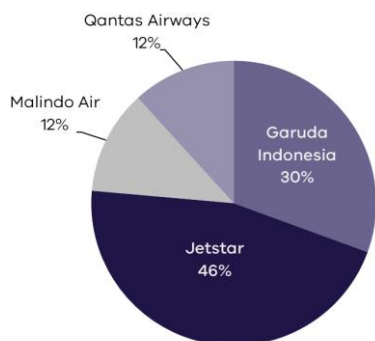
NB: Where there is a '-', figures are unreliable and are unable to be published.

The most visited Melbourne attractions by Indonesian overnight visitors to Victoria were the CBD shopping precinct (79 per cent compared with 63 per cent of international visitors overall) and Queen Victoria Market (64 per cent compared with 44 per cent of international visitors overall).

Other attractions that Indonesian visitors were more likely to visit compared to international visitors overall included Federation Square (43 per cent of Indonesian overnight visitors compared with 38 per cent of international visitors overall), Southbank/Southgate (38 per cent compared with 26 per cent of international visitors overall), St Kilda (35 per cent compared with 28 per cent of international visitors overall), Docklands/Marvel Stadium (27 per cent compared with 19 per cent of international visitors overall) and Chadstone Shopping Centre (25 per cent compared with 15 per cent of international visitors overall).

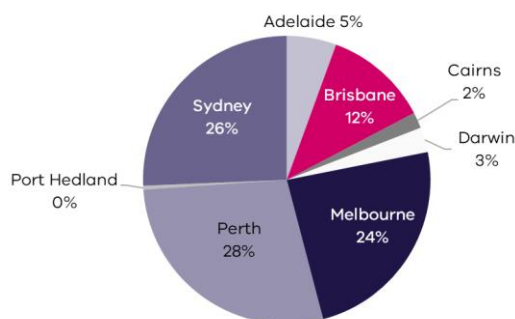
Aviation³

Airline Market Share – Direct Seats into Melbourne from Indonesia – Year ending December 2019



In the year ending December 2019, Jetstar contributed 46 per cent of the 502,000 available seats on direct flights from Indonesia to Melbourne, while Garuda Indonesia contributed 30 per cent.

Direct Flight Market Share – Direct Seats into Australian Airports from Indonesia – Year ending December 2019



In the year ending December 2019, Melbourne received 24 per cent of the 2.1 million available seats on direct flights from Indonesia to Australia. Perth received the largest share at 28 per cent of available seats, while Sydney received 26 per cent of available seats.

³ Note: Aviation capacity is measured by "available seats", which includes international visitors and Australian residents returning home.

Sources:

- International Visitor Survey (IVS), years ending December 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Regional Expenditure Model (REX) 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Tourism Australia Consumer Demand Project, Tourism Economics, April 2020
- International Airlines Operated Flights and Seats, year ending December 2019, Department of Infrastructure and Regional Development (BITRE)
- Visitor Arrivals and Departures, year ending December 2019, Tourism Research Australia

Base for IVS and Expenditure data: Only those trips where International visitors aged 15 years or over who have stayed in Australia for less than 12 months are in scope. Expenditure includes package expenditure.

Figures that are unreliable and unable to be published are represented by '-'. Figures might not add up due to rounding.

To view the full suite of 15 International Tourism Summaries (Victoria's top 15 international markets in terms of expenditure, visitors and nights), see <https://www.business.vic.gov.au/tourism-industry-resources/research/international-research>

For further information on IVS and Expenditure data sources used please refer to our Guide to Tourism Data Sources and Definitions document found here: <https://www.business.vic.gov.au/tourism-industry-resources/research/teve-research>

For further information on Tourism Australia's Consumer Demand Project, see <http://www.tourism.australia.com/en/markets-and-research/reports/consumer-research.html>

Further information on international visitor statistics: <https://www.tra.gov.au/international>;
<http://www.tourism.australia.com/en/markets-and-research/market-regions.html>

Factsheet produced by the TEVE Research Unit, May 2020.

Due care is taken in the production of this factsheet, however DJPR accepts no responsibility for the use of this information.