

# Consumer Demand Project 2019 Indonesia Market Fact Sheet



## Current Indonesia Visitation and Expenditure in Australia<sup>1</sup>

Indonesian visitors to Australia grew 6.3 per cent in the year ending September 2019 to reach 195,000, with visitors staying 5.6m nights, down by 1.6 per cent. During the same period, Overnight Visitor Expenditure (OVE) in Australia increased by 3.9 per cent to \$648.0m.



**\$648.0m** spend  
+3.9% year-on-year



**195,000** visitors  
+6.3% year-on-year



**5.6m** nights  
-1.6% year-on-year

## Factors of importance when choosing holiday destination

Indonesian travellers look for world class beauty and wildlife when they choose holiday destinations. Compared to other markets, they are more likely to seek out friendly local hospitality and clean cities with good infrastructure.

### Top five importance factors

% ranking each factor in their top five most important



**World class natural beauty and wildlife** **56%**  
(49%)



**A safe and secure destination** **51%**  
(54%)



**Friendly and open citizens, local hospitality** **39%**  
(32%)



**Clean cities, good road infrastructure, clear signposts** **38%**  
(24%)



**A family friendly destination** **36%**  
(26%)

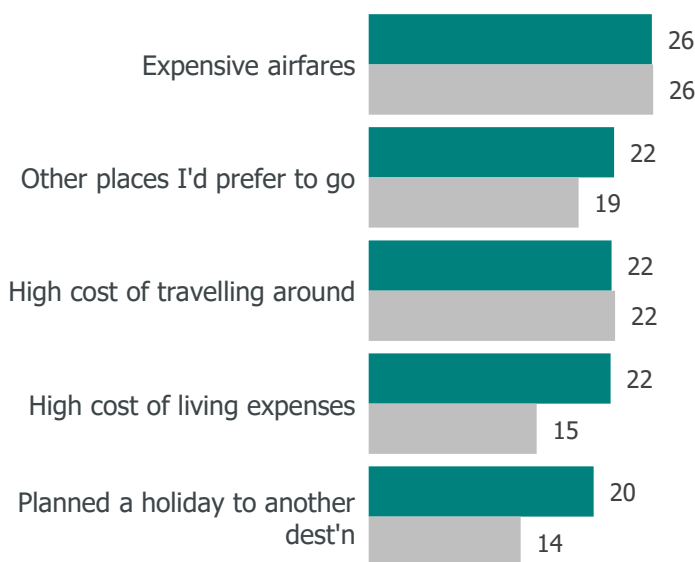
% Indonesian travellers (%) 11 Market total<sup>2</sup>

## Barriers to visiting Australia

Relative to other markets, Indonesians are more likely than average to cite the high cost of living expenses as a barrier to visiting Australia. Indonesians are also more likely than the average to mention preferences for visiting other destinations instead.

### Top five barriers to visiting Australia

% of those not intending to visit Australia



■ Indonesian travellers ■ 11 Market total<sup>2</sup>

## Research Background

The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)

<sup>2</sup> Aggregate result of all international markets surveyed: Australia, China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

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## Current Indonesia Visitation and Expenditure in Queensland<sup>1</sup>

Indonesian visitors to Queensland increased by 22.3 per cent in the year ending September 2019 to 24,000 and spent 692,000 nights in the state, up 36.8 per cent year-on-year. During the same time, Indonesian visitor spend grew by 21.8 per cent to \$52.3m.



**\$52.3m** spend  
+21.8% year-on-year



**24,000** visitors  
+22.3% year-on-year



**692,000** nights  
+36.8% year-on-year

## Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, Queensland ranked second amongst Indonesian travellers for consideration, and third for both experience awareness and intention. Queensland is the fourth most visited state.

**Queensland's competitive rankings<sup>3</sup>**  
ranking against other state and territories by market

	INDO	NZ	SIN	MAL	KOR	JAP	CHI	IND	GER	USA	UK
Consideration	2	1	1	2	3	1	1	3	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Experience awareness	3	1	2	1	3	1	2	2	1	2	2
	3	1	1	3	1	1	2	3	1	2	2
Intention	3	1	1	1	2	1	1	2	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Visitation (YE Dec 2018) <sup>4</sup>	4	1	4	4	2	1	3	3	2	2	2
	4	1	4	4	2	1	3	3	2	2	2

■ 2018 rank ■ 2019 rank

**How to read this:**  
Indonesian travellers rank Queensland 2<sup>nd</sup> out of Australian states and territories for consideration

## Australia's competitive rankings - Indo. market

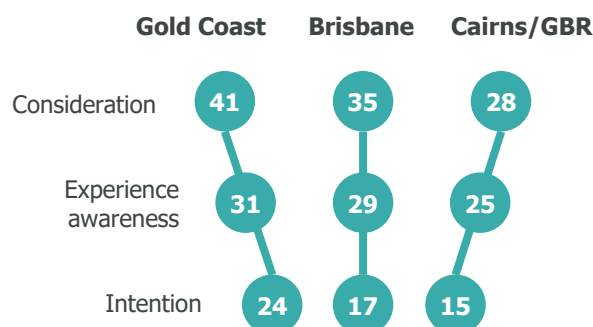
ranking against other international destinations



**How to read this:** Australia comes 2<sup>nd</sup> in the list of destinations Indonesian travellers intend to visit, but ranks 6<sup>th</sup> in terms of actual visitation

## Queensland destinations - Indo. market

% of travellers considering Australia



**How to read this:** 41% of Indonesian travellers considering visiting Australia have considered visiting the Gold Coast, but only 24% intend to actually visit

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)  
<sup>3</sup> INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany  
<sup>4</sup> Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

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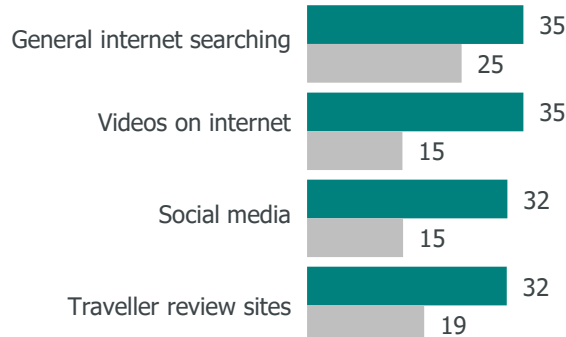


## Sources for travel planning

Compared to the 11 market total, Indonesian travellers are more likely to use a travel website or app during the travel booking cycle. Travel website/apps were the most commonly used booking source across flights, tours, and accommodation. Indonesian travellers are also more likely to source inspiration from internet searching, internet videos, social media, and traveller review sites.

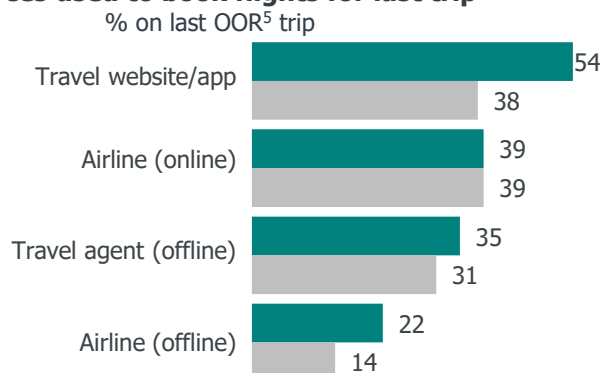
## Sources of inspiration for last trip

% on last OOR<sup>5</sup> trip



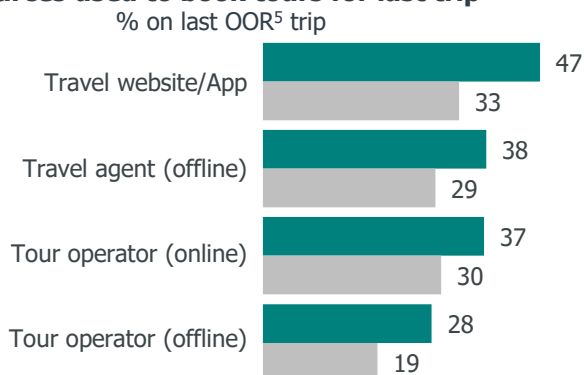
## Sources used to book flights for last trip

% on last OOR<sup>5</sup> trip



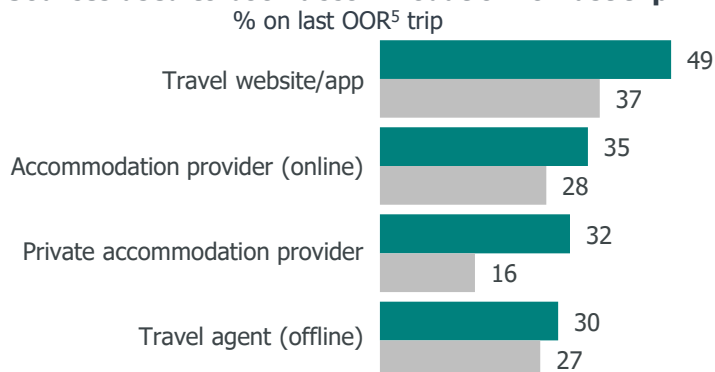
## Sources used to book tours for last trip

% on last OOR<sup>5</sup> trip



## Sources used to book accommodation for last trip

% on last OOR<sup>5</sup> trip



■ Indonesian travellers    ■ 11 Market total<sup>2</sup>



<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

<sup>5</sup> OOR Trip – Out of Region Trip (Indonesian travelling outside Nepal/Sri Lanka/Maldives/South East Asia [excluding Guam]/Middle East)