



Ministry of Tourism and Creative Economy
Republic of Indonesia

www.parekraf.go.id



ASEAN TOURISM FORUM

Draft as of 7 Jan 2011

INDONESIA VOLUNTARY REPORT



ASEAN TOURISM FORUM

2012

Manado-Indonesia

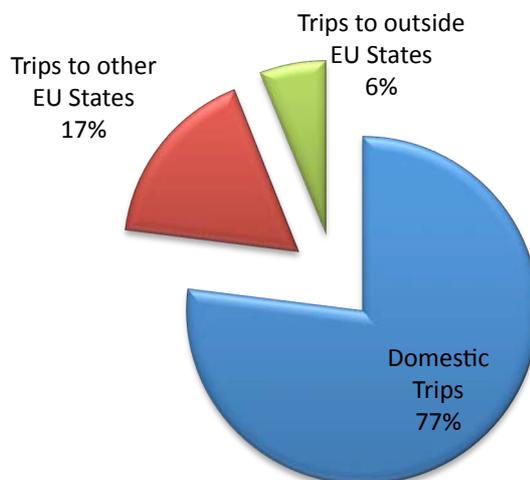
INDONESIA VOLUNTARY REPORT

1. Tourism Worldwide and ASEAN 2011

UNWTO reported in the Tourism Barometer (October 2011) that the number of international tourist arrivals reached 671 million from January to August 2011, up 29 million over the 642 million in the same period of 2010. Based on international tourist arrivals data of 150 countries around the world monitored by the UNWTO, 123 showed positive figures (82%) and only 27 countries reported negative results (18%). Furthermore, UNWTO forecasts a growth in international tourist arrivals of between 4% and 5% in 2011. It showed at the present time that the world tourism has recovered although global crisis is still existence.

However, the trend of international tourist behavior has changed from long haul to medium and short haul. Eurostat (Statistical Data Journal of European Union, 2011) reported in 2010 Europeans spend 77 % of their holiday trips in their own country, and 23 % of trips abroad (17 % trips to other EU Member States and only 6% trips to destinations outside the EU).

Chart 1 Domestic and Outbound Trips of EU Residents, 2010



Source: Eurostat (2011).

The phenomena of short and medium haul also can be found in ASEAN context. ASEAN Secretariat noted that 47 per cent of 73 million international tourists' arrivals in 2010 are intra-ASEAN travel. Furthermore, UNWTO estimated that tourism in South-East Asia is growing strongly, with arrivals up 12% in 2011.

Table 1 Tourist Arrivals in ASEAN

Country	2009			2010		
	Intra-ASEAN	Extra-ASEAN	Total	Intra-ASEAN	Extra-ASEAN	Total
Brunei Darussalam	77,7	79,7	157,5	65,3	65,3	130,6
Cambodia	692,8	1.468,8	2.161,6	853,2	1.655,1	2.508,3
Indonesia	2.101,8	4.221,9	6.323,7	2.338,5	4.664,4	7.002,9
Lao PDR	1.611,0	397,4	2.008,4	1.990,9	522,1	2.513,0
Malaysia	18.386,4	5.259,8	23.646,2	18.937,2	5.640,0	24.577,2
Myanmar	524,0	238,5	762,5	512,3	279,2	791,5
The Philippines	255,6	2.761,5	3.017,1	298,2	3.222,3	3.520,5
Singapore	3.650,9	6.030,3	9.681,3	4.821,8	6.819,9	11.641,7
Thailand	4.074,7	10.075,2	14.149,8	4.534,2	11.402,2	15.936,4
Viet Nam	318,9	3.453,3	3.772,3	465,9	4.584,0	5.049,9
ASEAN	31.693,8	33.986,5	65.680,3	34.817,4	38.854,6	73.672,0

Source: ASEAN Secretariat (2011).

2. Tourism Development in Indonesia (Restructuring NTO's from Ministry of Culture and Tourism to be Ministry of Tourism and Creative Economy)

President of the Republic of Indonesia, H.E. Soesilo Bambang Yudhoyono, on 18 October 2011 announced cabinet reshuffle in his second Presidency period. Since the time, the nomenclature of the Indonesian NTO has changed from Ministry of Culture and Tourism to be Ministry of Tourism and Creative Economy. On the other hand, cultural development affairs are embedded to Ministry of National Education by transforming it to be Ministry of Education and Culture.

Indonesia sees that tourism has close relation with creative economy as a major driver. As highlighted by UNCTAD (2010), creative economy is an evolving concept based on creative assets potentially generating economic growth and development. In this regard, the Government of Indonesia focus to develop 15 sub-sectors of creative industry namely: 1) advertising, 2) architecture, 3) art products, 4) handicraft, 5) design, 6) fashion, 7) video, film, and photography, 8) interactive games, 9) music, 10) performance art, 11) printing and publishing, 12) computers and their appliances, 13) television and radio, 14) research and development and 15) culinary.

Indonesia was the first country to have a ministry which handled creative economy, a sector whose main basis was human resources that had unlimited sustainability, unlike other industries whose basis was natural resources. Creative economy is expected to reinforce national economy strength in the face of the impact of the global economic crisis.

The government of Indonesia has a policy to use sustainable development paradigm into tourism development and management by implementing 4 principles, namely pro poor, pro growth, pro job, and pro environment. In this regard, there are 4 focus and priority activities in developing Indonesia tourism. These are 1) development of tourism industry, 2) development of tourism destination, 3) development of tourism promotion and marketing, and 4) development of tourism resources and institution.

3. Development of Foreign Visitor Arrivals to Indonesia

Indonesia is rich in natural and cultural tourist attractions. Therefore the government of Indonesia pays more attention to tourism sector since tourism can contribute significantly to national economy.

Foreign visitor arrivals to Indonesia since 2006 to 2011 recorded a significant growth in every year. However the average length of stay has fluctuated. It reached 9,09 in 2006, decrease significantly to 7,69 in 2009 due to global economic crisis, and has recorded a slight increase in 2010 to 8,04 average length of stay, then it decrease again to 7,84 in 2011 as seen on Table 2.

Table 2 Foreign Visitor Arrivals to Indonesia 2006-2011

Year	Number of Foreign Visitor Arrivals		Average Length of Stay (Day)
	Visit	Growth	
2006	4.871.351	-2,61	9,09
2007	5.505.759	13,02	9,02
2008	6.234.497	13,24	8,58
2009	6.323.730	1,43	7,69
2010	7.002.944	10,74	8,04
2011	7,6 (million)	8,5	7,84

Source: Statistics Indonesia and Ministry of Tourism and Creative Economy (2011).

From January to November 2011, Indonesia welcomed 6.925.192 foreign visitor arrivals representing 8,91% increase compared to 2010 which accounted for 6.358.723 at the same period. Until December 2011, Ministry of Tourism and Creative Economy has projected the foreign visitor arrivals will reach 7,6 million visitors up 8,54% compare to 2010 as seen on Table 3.

Table 3 Comparison Foreign Visitor Arrivals 2010 vs 2011

Months	2011	2010	(+/-)
January	548.821	493.799	11,14%
February	568.057	523.135	8,59%
March	598.068	594.242	0,64%
April	608.093	555.915	9,39%
May	600.191	600.031	0,03%
J u n e	674.402	613.422	9,94%
J u l y	745.451	658.476	13,21%
August	621.084	586.530	5,89%
September	650.071	560.367	16,01%
October	656.006	594.654	10,32%
November	654,948	578.152	13,28%
Jan-Nov	6.925.192	6.358.723	8,91%
December	688.000	644.221	6,80%
Total	7,6 (Million)	7.002.944	8,54%

Source: Statistics Indonesia and Ministry of Tourism and Creative Economy (2011).

Notes: Jan- Nov is real data, Dec is projection data.

Top 14 tourism markets to Indonesia as listed in the below table have shared 76,59% from total tourist arrival to Indonesia since January to November 2011. In 2011, the highest growth generating market was Australia (22,08%), the Philippines (20,76%), and Middle-East (18,11%).

Table 4 Number of Visitor Arrivals from Major Markets from January to November 2010 – 2011 (by nationality and 19 port of entry)

No.	Major Market	2011	2010	(+/-)	Absolute Number
1	Singapore	1.099.352	988.456	11,22%	110.896
2	Malaysia	922.756	934.716	-1,28%	-11.960
3	Australia	807.875	661.760	22,08%	146.115
4	China	464.539	394.017	17,90%	70.522
5	Japan	381.578	375.552	1,60%	6.026
6	South Korea	277.639	260.241	6,69%	17.398
7	United Kingdom	178.209	172.759	3,15%	5.450
8	France	160.282	149.180	7,44%	11.102
9	Netherlands	145.848	142.100	2,64%	3.748
10	India	149.432	130.037	14,91%	19.395
11	Germany	133.073	130.549	1,93%	2.524
12	the Philippines	117.900	97.635	20,76%	20.265
13	Middle East	87.054	73.706	18,11%	13.348
14	Russia	77.061	68.960	11,75%	8.101
	Others	1.529.290	1.403.633	8,95%	125.657
	TOTAL	6.531.888	5.983.301	9,17%	548.587

Source: Statistics Indonesia and Ministry of Tourism and Creative Economy (2011).

However, there are 3 ASEAN countries at the top 12 tourism markets, namely Singapore (1.099.352), Malaysia (922.756), and the Philippines (117.900).

Table 5 Number of Visitor Arrivals from ASEAN Countries By Nationality
2006 – 2011

No.	Nationality	2006	2007	2008	2009	2010	2011
1	Singapore	1.164.082	1.160.200	1.197.267	1.138.071	1.206.360	1.099.352
2	Malaysia	699.124	79.999	1.009.722	1.041.053	1.171.737	922.756
3	the Philippines	187.711	192.868	195.675	196.429	171.181	117.900
4	Thailand	66.864	71.753	66.012	93.381	111.645	75.838
5	Brunei Darussalam	11.154	11.594	10.536	13.668	35.874	-
6	Viet Nam	17.154	16.392	1.971	20.785	24.929	-
7	Myanmar	20.538	14.413	17.487	18.128	15.582	-
8	Cambodia	4.098	1.987	1.959	1.975	5.265	-
9	Lao PDR	826	956	786	969	1.932	-
	TOTAL ASEAN	2.171.551	1.550.162	2.501.415	2.524.459	2.744.505	-

Source: Statistics Indonesia and Ministry of Tourism and Creative Economy (2011).

4. Foreign Exchange Earning from Tourism Sector

As mentioned above that visitor arrivals to Indonesia in 2011 estimated for 7,6 million and it has generated foreign exchange earning of US\$ 8.5 million or an increase of 11.8% from 2010.

The average expenditure per visit per visitor in 2011 is US\$ 1,118.26. It was a slight increase compared to 2010 where the average expenditure was US\$ 1,085.75.

Table 6 Average Expenditure and Foreign Exchange Earning 2006-2011

Year	Average Expenditure Per Person (US\$)		Foreign Exchange Earning		Foreign Visitors
	Per Day	Per Visit	Million (US\$)	Growth (%)	
2006	100,48	913,09	4.447,98	-1,63	4.871.351
2007	107,7	970,98	5.345,98	20,19	5.505.759
2008	137,38	1.178,54	7.347,60	37,44	6.234.497
2009	129,57	995,93	6.297,99	-14,29	6.323.730
2010	135,01	1.085,75	7.603,45	20,73	7.002.944
2011	142,69	1.118,26	8.500	11,8	7.601.244

Source: Statistics Indonesia and Ministry of Tourism and Creative Economy (2011).

5. Accommodation

In 2011, the total number of accommodation is 15.283 units, made up 1.489 classified hotels (one to five star rated hotel), and 13.794 units (non-classified) with a cumulative capacity of 381.457 rooms.

In line with the increasing visitor arrivals to Indonesia, the average of occupancy rate of classified hotel also increased that in 2011 reached 52,55%, compared to 2010 which only reached 50,32% in the period between January to November.

Table 7 Room Occupancy Rate of Classified Hotel in Twenty Main Tourism Province Destination 2011

Province	2011										
	January	February	March	April	May	June	July	August	September	October	Nov
North Sumatera	42,57	44,49	44,81	43,31	44,52	43,8	45	34,2	40,93	42,53	43,9
West Sumatera	40,05	40,37	44,63	47,24	51,41	50,78	60,31	37,66	50,62	51,49	51,73
DKI Jakarta	56,41	58,01	56,2	57,21	56,87	57,76	59,95	50,98	55,18	59,16	59,09
West Java	48,4	48,74	48,91	49,57	49,76	52,93	59,59	39,22	43,47	48,51	43,68
Central Java	38,54	41,71	41,78	41,35	39,73	44,18	42,24	35,57	44,29	45,84	50,94
DI Yogyakarta	37,4	45,47	45,2	49,77	48,62	53,1	62,45	35,06	55,74	58,21	55,27
East Java	46,58	47,1	47,53	47,68	47,27	52,72	54,45	43,76	50,86	53,69	50,6
Bali	64,66	62,23	63,16	64,03	62,9	70,47	71,74	62,69	65,01	65,63	60,15
North Sulawesi	32,88	34,39	51,26	48,32	50,35	52,93	58,92	51,43	49,52	57,65	43,6
South Sulawesi	39,9	40,05	40,14	43,38	42,84	49,1	52,95	33,53	47,97	52,6	50,29
East Kalimantan	55,35	53,78	56,8	56,96	61,85	61,21	58,56	56,55	57,21	54,6	59,49
Riau	39,14	46,04	47,15	51,26	49	54,25	54,76	40,17	50,62	52,61	50,88
West Nusa Tenggara	40,22	45,46	45,16	50,97	47,4	52,62	53,27	46,7	53,6	55,34	52,69
Kepulauan Riau	35,61	41,9	44,68	45,76	45,71	46,05	47,93	38,6	39,63	46,51	45,95
Lampung	52,28	54,88	51	54,6	54,27	62,56	56,94	46,48	56,54	51,49	54,38
Jambi	47,8	40,7	48,1	51,04	49,93	46,46	43,55	39,38	41,23	52,38	39,88
Central Sulawesi	70,01	68,9	75,07	71,04	75,48	68,62	62,45	42,14	56,28	63,12	59,82
Kep, Bangka Belitung	43,98	44,85	40,92	45,37	45,72	51,11	53,49	34,92	51,05	59,03	52,93
South Kalimantan	58,11	55,57	56,69	58,65	61,52	64,32	60,61	40,94	50,46	62,02	53,21
West Kalimantan	32,61	38,63	39,79	43,86	48,14	46,52	50,48	40,43	47,62	46,75	54,95
Total	50,47	51,34	51,95	52,1	52,13	56,01	58,37	46,05	51,75	54,87	52,97

Source: Statistics Indonesia and Ministry of Tourism and Creative Economy (2011).

Table 8 Room Occupancy Rate of Classified Hotel in Twenty Main Tourism Province Destination 2010

Province	2010										
	January	February	March	April	May	June	July	August	September	October	Nov
North Sumatera	37,07	35,87	39,83	38,44	38,66	46,43	47,07	44,43	46,62	45,98	46,61
West Sumatera	41,08	44,85	44,44	46,39	55,14	52,17	54,41	34,75	42,74	52,28	52,88
DKI Jakarta	52,55	47,22	53,55	57,89	59,32	58	61	49,82	48,41	59,04	55,7
West Java	48,4	46,62	49,47	48,39	49,03	52,44	53,66	41,5	48,5	49,2	48,02
Central Java	39,45	38,47	40,06	40,19	39,48	44,98	43,08	36,98	45,15	41,4	40,77
DI Yogyakarta	47,28	45,19	51,8	55	57,21	58,5	63,17	38,47	50,64	57,78	24,59
East Java	43,72	51,11	47,73	48,99	47,97	49,11	50,41	47,13	51,08	49,26	49,5
Bali	53,21	56,91	59,3	59,19	60,39	64,56	66,28	60,02	62,06	64,56	59,52
North Sulawesi	34,59	47,35	44,76	44,77	49,81	45,64	44,14	43,97	43,36	41,01	40,94
South Sulawesi	36,05	41,71	43	42,94	42,45	43,48	50,57	39,53	46,23	48,2	48,48
East Kalimantan	45,26	52,51	49,71	43,91	40,41	40,7	41,54	37,69	46,43	45,13	54,94
Riau	37,55	40,6	40,08	34,32	47,74	54,6	51,64	42,19	44,66	49,47	49,13
West Nusa Tenggara	37,18	37,61	45,35	42,62	47,88	50,26	50,63	44,07	45,54	49,39	51,04
Kepulauan Riau	34,03	38,97	39,23	33,95	39,18	41,35	38,02	46,07	47,32	42,59	40,17
Lampung	48,79	47,21	53,39	48,37	52,95	49,22	51,51	43,05	45,97	49,63	46,48
Jambi	47,81	45,67	52,54	53,93	46,78	41,12	42,39	37,98	36,71	47,91	48,12
Central Sulawesi	57,5	64,27	62,52	59,6	64,02	77,51	79,34	57,09	61,05	75,16	70,1
Total	46,16	47,15	50,04	49,77	51,22	53,37	54,41	47,19	50,61	53,34	50,25

Source: Statistics Indonesia and Ministry of Tourism and Creative Economy (2011).

6. International and National Tourism Events

In order to boost the number of foreign visitor arrivals to Indonesia in 2012, Indonesia will host a number of international events such as follows:

- a. Tourism Indonesia Mart and Expo (TIME), is scheduled to be conducted on October every year in different provinces.
- b. Indonesia Travel and Tourism Fair (ITTF) 2012, on September in Jakarta.
- c. Garuda Indonesia Travel Fair (GATF), is scheduled to be conducted on October or November every year in Jakarta.
- d. Sumatera International Travel Fair (SITF), on June in Medan, North Sumatera.
- e. Java Jazz 2012 on March in Jakarta,
- f. Indonesia Creative Product Festival 2012, on June in Jakarta,

- g. World Stamp Exhibition 2012, on 18-24 June in Jakarta,
- h. Indonesia Food and Hotel Exhibition, on 8-10 March in Bali,
- i. International Halal Business and Food Expo (IHBF), on July in Jakarta.

--000--