

# ASEAN Overseas Travel Awareness Survey Report <Indonesia>

March 2021



Survey conducted by:

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### [Survey Overview]

Method	<ul style="list-style-type: none"> <li>• Internet survey</li> <li>• Screening survey (preliminary survey) was first conducted by the Internet survey firm (Micromill, Inc.) utilizing survey monitor panel the firm maintains and actual survey conducted to qualified respondents.</li> </ul>
Survey Period	<ul style="list-style-type: none"> <li>• Friday, January 22 and Saturday, January 23, 2021</li> </ul>
Sample Qualification	<ul style="list-style-type: none"> <li>• Male/female 20 years old or older. Travels abroad at least once every 3 years and intends to travel abroad in the future.</li> </ul> <p>*For each country, ensure to include at least 30 samples with experience of visiting the country.</p>



- Of the 10,000 males/females aged 20 and over who took part in this nationwide survey (including people with no intention of overseas travel), **10.8% visited Indonesia**, with 8.0% stating their purpose as sightseeing, and 2.0% as business.
  - The percentage of people who had visited increased as the age group increased, and by age group, males 60 and over had the highest visit percentage at 14.8%.

### **[Questions for people who have visited Indonesia]**

- Regarding number of visits, the highest percentage of respondents (54.6%) had visited Indonesia once, followed by twice (20.9%), with over **20% of males in their 50s having visited five times or more**.
- The highest purpose of visiting Indonesia was **“Sightseeing/leisure” at 69.4%, followed by “Business trips” (16.3 %**. The purpose for over 80% of females was “Sightseeing/leisure,” and 24.9% of males responded that their purpose was “Business trips.”
- Regarding deciding factor in choosing Indonesia as a destination, 22.9% of respondents answered “Recommended by family/friends/acquaintances,” 20.6% answered “There was a good deal.” **A high number of young people answered “The trip was low cost,”** and this response rate fell as the age group rose. 28.9% of respondents in their 20s answered “Viewed on social media” which is higher than all other age groups.
- In terms of points of satisfaction upon visiting Indonesia, responses were “Natural scenery” (41.1%), “Scenery and atmosphere” (40.9%), “Food ingredients and cuisine” (33.7%). The percentage of males who answered “Souvenirs and local products” was low at 9.0%, however 24.2% of females said they were satisfied with this aspect. Age group-wise, **there was a tendency for people in their 50s and 60s to have a higher level of satisfaction than other age groups**.
- 41.4% of respondents answered that they were dissatisfied with “Nothing in particular,” **and although 40% say there was nothing they were dissatisfied with, a higher percentage of people in their 20s and 30s said they were not satisfied compared to all other age groups**.
  - A comparison of points of satisfaction and points of dissatisfaction showed that the level of satisfaction could be further improved if measures were taken to alleviate concern regarding public security, souvenirs and local products were enhanced, opportunities to interact with locals were created, etc.



### [Questions for all respondents with intention to travel overseas]

- Regarding impression of Indonesia, 23.8% answered “Beautiful nature and scenery,” and 23.4% answered “Has charming beach resorts.”
  - **A high percentage of respondents who’d visited Indonesia before answered “Can relax,” “Delicious food,” “Pleasant climate,” “Can stay in luxurious accommodation” etc.** indicating a need to communicate the appeal of Indonesia to people who’ve never visited as well.
- Regarding intention to travel to Indonesia for sightseeing, a high percentage of respondents answered **“I want to go” (58.1%)**. Many of those who had already visited wanted to visit again (**72.5%**). Age-wise, intention to travel Indonesia **was high for both males and females in their 40s.**
- As for what they’d like to do in Indonesia, 48.7% answered “Enjoy nature and scenery,” and 44.7% said “Relax and rejuvenate.” For all items, females expressed a greater desire than males. Also, **a high percentage of people who’d visited before answered “Want to stay in a famous hotel,” revealing that there is an awareness that good-quality accommodation exists.**
- As for the reason why people had no intention to travel to Indonesia, the **highest percentage** of people answered **“The level of public security concerns me” (41.3%) and “I don’t know what that country offers in the first place” (24.5%)**. By gender, **more females gave this response than males (Male: 20.4%、 Female : 28.9%)**, and younger age groups gave such answers more than older age groups.
- Of Indonesia’s major five tourism resources, **the highest awareness was of Bali (66.4%) and excluding Bali, males had higher awareness of the remaining four tourism resources.** The response of “I’ve never heard of it, I don’t know” was particularly low for males in their 20s compared to other age groups.



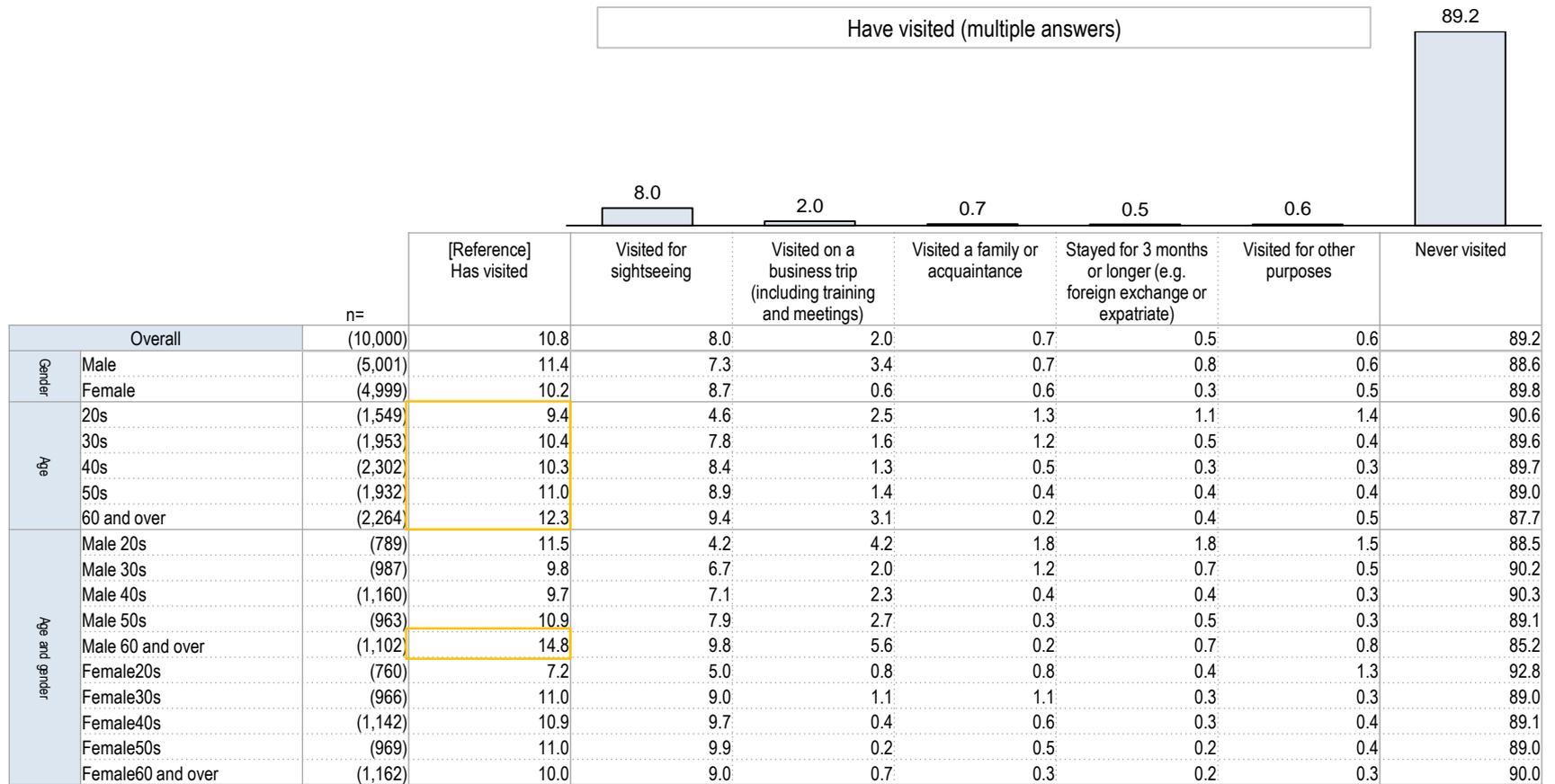
# Survey Results

## 1. Visit experience (details)

- Of the 10,000 males/females aged 20 and over who took part in a nationwide survey (including people with no intention of overseas travel), 10.8% had visited Indonesia, with 8.0% having travelled for sightseeing and 2.0% for business.
  - The percentage of people who had visited Indonesia increased as the age group increased, and by age group, males 60 and over had the highest visit percentage at 14.8%.

### People who have visited Indonesia (Screening survey)

Q. Have you ever visited the below country or region? Please give all applicable answers for each country/region. **[Indonesia]**





# Survey Results

## 2. [People who have visited] Number/timing of visits

- Regarding number of visits to Indonesia, the highest percentage of respondents (54.6 %) had visited once, followed by twice (20.9%). Over 20% of males in their 50s had visited five times or more.
- The most recent timing of visits to Indonesia was 2016 or earlier (54.9%), and this answer was particularly high amongst people aged 50 and over (over 65%).

### [People who have visited] Number of visits

Q. How many times have you visited each country? Please only give one applicable answer for each country. \*Regardless of purpose – e.g. sightseeing, business, etc. [Indonesia]

Once Twice 3 times 4 times 5 times or more

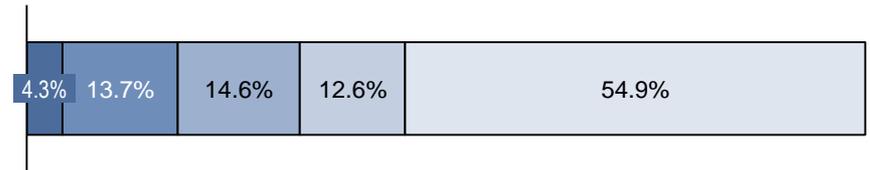


		n=	Once	Twice	3 times	4 times	5 times or more
Overall		(350)	54.6	20.9	8.6	2.6	13.4
Gender	Male	(201)	49.8	21.9	10.0	2.5	15.9
	Female	(149)	61.1	19.5	6.7	2.7	10.1
Age	20s	(45)	57.8	22.2	13.3	0.0	6.7
	30s	(70)	51.4	18.6	14.3	4.3	11.4
	40s	(61)	54.1	24.6	8.2	3.3	9.8
	50s	(76)	51.3	18.4	10.5	2.6	17.1
	60 and over	(98)	58.2	21.4	1.0	2.0	17.3
	Age and gender	Male 20s	(27)	55.6	25.9	14.8	0.0
Male 30s		(45)	55.6	13.3	13.3	2.2	15.6
Male 40s		(34)	50.0	23.5	14.7	2.9	8.8
Male 50s		(42)	42.9	21.4	9.5	2.4	23.8
Male 60 and over		(53)	47.2	26.4	1.9	3.8	20.8
Female 20s		(18)	61.1	16.7	11.1	0.0	11.1
Female 30s		(25)	44.0	28.0	16.0	8.0	4.0
Female 40s		(27)	59.3	25.9	0.0	3.7	11.1
Female 50s		(34)	61.8	14.7	11.8	2.9	8.8
Female 60 and over		(45)	71.1	15.6	0.0	0.0	13.3

### [People who have visited] Timing of visit

Q. When did you take the trip? Please only give one applicable answer for each country. \*If you have visited a country more than once, please tell us the purpose of your most recent trip. [Indonesia]

2020 or later Around 2019 Around 2018 Around 2017 2016 or earlier



		n=	2020 or later	Around 2019	Around 2018	Around 2017	2016 or earlier
Overall		(350)	4.3	13.7	14.6	12.6	54.9
Gender	Male	(201)	5.0	17.4	15.4	14.4	47.8
	Female	(149)	3.4	8.7	13.4	10.1	64.4
Age	20s	(45)	13.3	20.0	20.0	20.0	26.7
	30s	(70)	8.6	11.4	24.3	15.7	40.0
	40s	(61)	1.6	8.2	13.1	16.4	60.7
	50s	(76)	1.3	19.7	6.6	6.6	65.8
	60 and over	(98)	1.0	11.2	12.2	9.2	66.3
	Age and gender	Male 20s	(27)	14.8	18.5	18.5	25.9
Male 30s		(45)	8.9	13.3	28.9	17.8	31.1
Male 40s		(34)	0.0	14.7	14.7	17.6	52.9
Male 50s		(42)	2.4	28.6	7.1	7.1	54.8
Male 60 and over		(53)	1.9	13.2	9.4	9.4	66.0
Female 20s		(18)	11.1	22.2	22.2	11.1	33.3
Female 30s		(25)	8.0	8.0	16.0	12.0	56.0
Female 40s		(27)	3.7	0.0	11.1	14.8	70.4
Female 50s		(34)	0.0	8.8	5.9	5.9	79.4
Female 60 and over		(45)	0.0	8.9	15.6	8.9	66.7



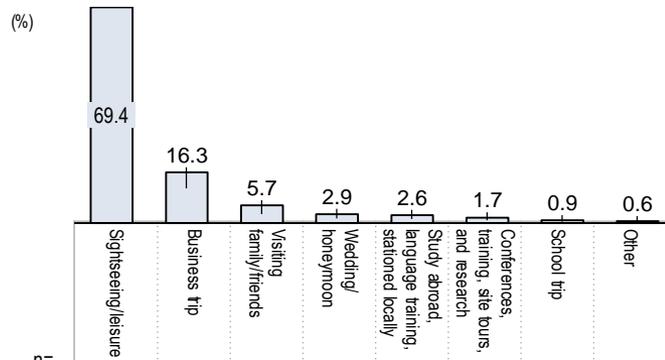
# Survey Results

## 3. [People who have visited] Purpose/companion

- The highest purpose of visiting Indonesia was “Sightseeing/leisure” at 69.4%, followed by “Business trips” (16.3%). The purpose for over 80% of females was “Sightseeing/leisure,” and 24.9% of males responded that their purpose was “Business trips.”
- Regarding travel companion, “Spouse/partner” ranked highest (35.7%), “Friends/acquaintances” second highest (25.4%), then “Family and relatives (20.0%).”

### [People who have visited] Purpose of visit

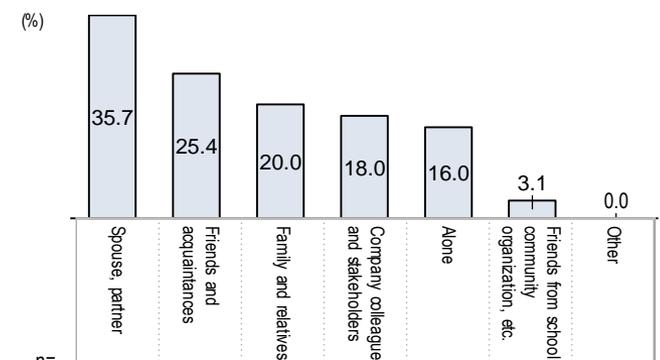
Q. What was the main purpose of the trip? Please only give one applicable answer as the purpose of visiting each country. \*If you have visited a country more than once, please tell us the purpose of your most recent trip. [Indonesia]



		n=	Sightseeing/leisure	Business trip	Visiting family/friends	Wedding/honeymoon	Study abroad, language training, stationed locally	Conferences, training, site tours, and research	School trip	Other
Gender	Overall	(350)	69.4	16.3	5.7	2.9	2.6	1.7	0.9	0.6
	Male	(201)	59.7	24.9	7.0	3.0	2.0	2.0	1.0	0.5
	Female	(149)	82.6	4.7	4.0	2.7	3.4	1.3	0.7	0.7
Age	20s	(45)	62.2	15.6	8.9	6.7	4.4	2.2	0.0	0.0
	30s	(70)	55.7	14.3	11.4	4.3	10.0	1.4	2.9	0.0
	40s	(61)	78.7	13.1	3.3	1.6	0.0	0.0	1.6	1.6
	50s	(76)	68.4	19.7	3.9	3.9	0.0	3.9	0.0	0.0
	60 and over	(98)	77.6	17.3	3.1	0.0	0.0	1.0	0.0	1.0
	Age and gender	Male 20s	(27)	51.9	18.5	11.1	7.4	7.4	3.7	0.0
Male 30s		(45)	51.1	20.0	13.3	6.7	4.4	2.2	2.2	0.0
Male 40s		(34)	76.5	20.6	0.0	0.0	0.0	0.0	2.9	0.0
Male 50s		(42)	54.8	33.3	7.1	2.4	0.0	2.4	0.0	0.0
Male 60 and over		(53)	64.2	28.3	3.8	0.0	0.0	1.9	0.0	1.9
Female 20s		(18)	77.8	11.1	5.6	5.6	0.0	0.0	0.0	0.0
Female 30s		(25)	64.0	4.0	8.0	0.0	20.0	0.0	4.0	0.0
Female 40s		(27)	81.5	3.7	7.4	3.7	0.0	0.0	0.0	3.7
Female 50s		(34)	85.3	2.9	0.0	5.9	0.0	5.9	0.0	0.0
Female 60 and over		(45)	93.3	4.4	2.2	0.0	0.0	0.0	0.0	0.0

### [People who have visited] Travel companion

Q. Who accompanied you on the trip? Please give all the answers that are applicable for each country. \*If you have visited a country more than once, please tell us about your companion on your most recent trip. [Indonesia]



		n=	Spouse, partner	Friends and acquaintances	Family and relatives	Company colleagues and stakeholders	Alone	Friends from school, community organization, etc.	Other
Gender	Overall	(350)	35.7	25.4	20.0	18.0	16.0	3.1	0.0
	Male	(201)	33.3	16.9	18.9	22.9	21.9	4.0	0.0
	Female	(149)	38.9	36.9	21.5	11.4	8.1	2.0	0.0
Age	20s	(45)	22.2	46.7	26.7	8.9	11.1	4.4	0.0
	30s	(70)	32.9	22.9	18.6	24.3	8.6	11.4	0.0
	40s	(61)	29.5	21.3	29.5	13.1	16.4	0.0	0.0
	50s	(76)	39.5	21.1	14.5	22.4	26.3	1.3	0.0
	60 and over	(98)	44.9	23.5	16.3	17.3	15.3	0.0	0.0
	Age and gender	Male 20s	(27)	25.9	48.1	22.2	3.7	18.5	7.4
Male 30s		(45)	35.6	13.3	15.6	28.9	11.1	13.3	0.0
Male 40s		(34)	26.5	17.6	32.4	17.6	20.6	0.0	0.0
Male 50s		(42)	35.7	7.1	14.3	26.2	33.3	0.0	0.0
Male 60 and over		(53)	37.7	11.3	15.1	28.3	24.5	0.0	0.0
Female 20s		(18)	16.7	44.4	33.3	16.7	0.0	0.0	0.0
Female 30s		(25)	28.0	40.0	24.0	16.0	4.0	8.0	0.0
Female 40s		(27)	33.3	25.9	25.9	7.4	11.1	0.0	0.0
Female 50s		(34)	44.1	38.2	14.7	17.6	17.6	2.9	0.0
Female 60 and over		(45)	53.3	37.8	17.8	4.4	4.4	0.0	0.0



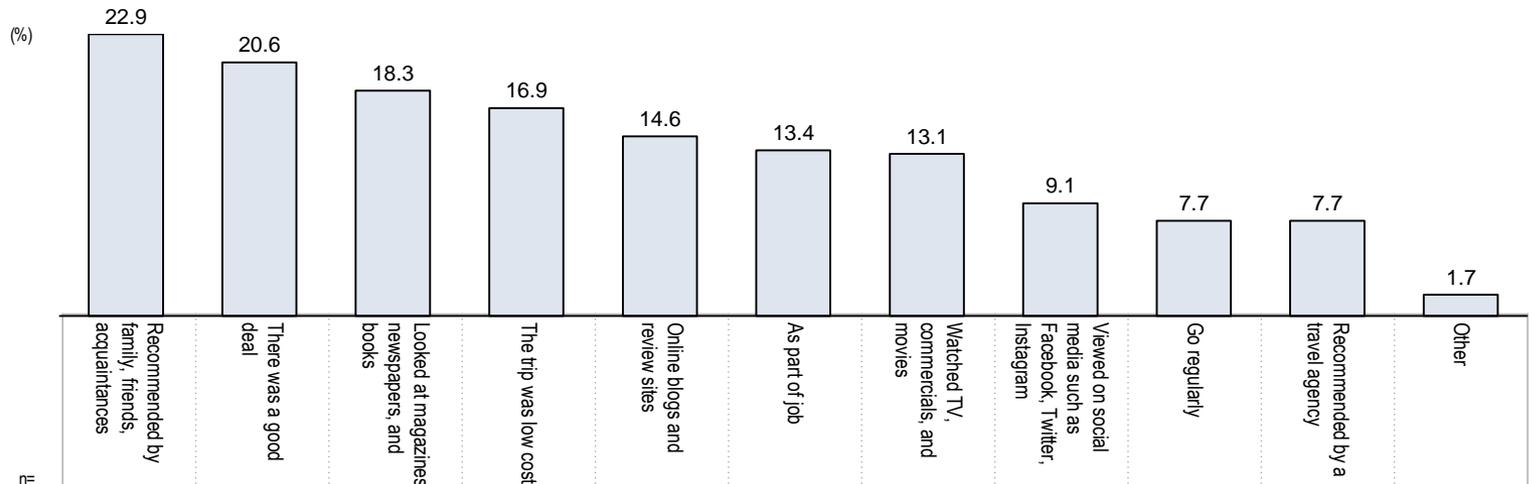
# Survey Results

## 4. [People who have visited] Deciding factor in choosing travel destination

- Regarding deciding factors in choosing travel destination, responses were “Recommended by family, friends, acquaintances” (22.9%), “There was a good deal” (20.6%), and “Looked at magazines, newspapers, and books” (18.3%).
- A high number of young people answered “The trip was low cost,” and this answer percentage fell as the age group rose. 28.9% of respondents in their 20s answered “Viewed on social media” which is higher than all other age groups.

### [People who have visited] Deciding factor in choosing travel destination

Q. What was the deciding factor in choosing your travel destination? Please give all the answers that are applicable. \*If you have visited a country more than once, please tell us about your most recent trip. [Indonesia]



		N	22.9	20.6	18.3	16.9	14.6	13.4	13.1	9.1	7.7	7.7	1.7
Overall		(350)	22.9	20.6	18.3	16.9	14.6	13.4	13.1	9.1	7.7	7.7	1.7
Gender	Male	(201)	21.4	18.4	16.9	15.4	15.4	18.4	12.4	10.0	10.9	9.0	1.0
	Female	(149)	24.8	23.5	20.1	18.8	13.4	6.7	14.1	8.1	3.4	6.0	2.7
Age	20s	(45)	20.0	13.3	8.9	22.2	6.7	6.7	15.6	28.9	4.4	11.1	2.2
	30s	(70)	28.6	18.6	12.9	22.9	17.1	10.0	14.3	11.4	10.0	7.1	1.4
	40s	(61)	39.3	32.8	19.7	19.7	14.8	11.5	11.5	4.9	8.2	6.6	1.6
	50s	(76)	11.8	21.1	25.0	11.8	21.1	19.7	14.5	7.9	6.6	6.6	0.0
	60 and over	(98)	18.4	17.3	20.4	12.2	11.2	15.3	11.2	2.0	8.2	8.2	3.1
	Age and gender	Male 20s	(27)	22.2	11.1	14.8	11.1	11.1	7.4	22.2	29.6	7.4	7.4
Age and gender	Male 30s	(45)	28.9	17.8	11.1	24.4	26.7	6.7	17.8	15.6	15.6	11.1	0.0
Age and gender	Male 40s	(34)	38.2	38.2	20.6	20.6	11.8	17.6	8.8	2.9	8.8	8.8	0.0
Age and gender	Male 50s	(42)	7.1	21.4	16.7	11.9	19.0	28.6	11.9	7.1	9.5	9.5	0.0
Age and gender	Male 60 and over	(53)	15.1	7.5	20.8	9.4	7.5	26.4	5.7	1.9	11.3	7.5	3.8
Age and gender	Female 20s	(18)	16.7	16.7	0.0	38.9	0.0	5.6	5.6	27.8	0.0	16.7	5.6
Age and gender	Female 30s	(25)	28.0	20.0	16.0	20.0	0.0	16.0	8.0	4.0	0.0	0.0	4.0
Age and gender	Female 40s	(27)	40.7	25.9	18.5	18.5	18.5	3.7	14.8	7.4	7.4	3.7	3.7
Age and gender	Female 50s	(34)	17.6	20.6	35.3	11.8	23.5	8.8	17.6	8.8	2.9	2.9	0.0
Age and gender	Female 60 and over	(45)	22.2	28.9	20.0	15.6	15.6	2.2	17.8	2.2	4.4	8.9	2.2



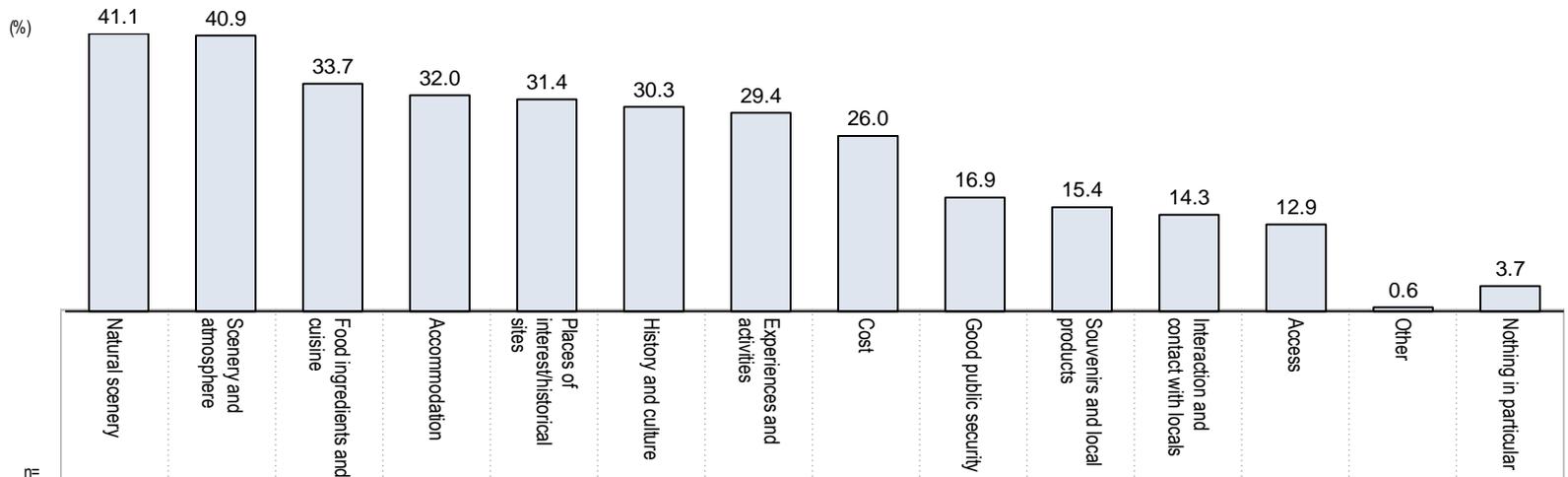
# Survey Results

## 5. [People who have visited] Points of satisfaction

- In terms of points of satisfaction upon visiting Indonesia, responses were “Natural scenery” (41.1%), “Scenery and atmosphere,” (40.9%), and “Food ingredients and cuisine” (33.7%). Age group-wise, there was a tendency for people in their 50s and 60s to have a higher level of satisfaction than other age groups. Also, the percentage of males who answered “Souvenirs and local products” was low at 9.0%, however 24.2% of females said they were satisfied with this aspect.

### [People who have visited] Points of satisfaction

Q. What were you satisfied with when you visited the destination? Please answer everything that applies to each country. [Indonesia]



		n	Natural scenery	Scenery and atmosphere	Food ingredients and cuisine	Accommodation	Places of interest/historical sites	History and culture	Experiences and activities	Cost	Good public security	Souvenirs and local products	Interaction and contact with locals	Access	Other	Nothing in particular
Overall		(350)	41.1	40.9	33.7	32.0	31.4	30.3	29.4	26.0	16.9	15.4	14.3	12.9	0.6	3.7
Gender	Male	(201)	31.3	28.4	26.9	26.4	31.3	31.3	24.4	23.4	13.9	9.0	14.9	12.9	1.0	5.0
	Female	(149)	54.4	57.7	43.0	39.6	31.5	28.9	36.2	29.5	20.8	24.2	13.4	12.8	0.0	2.0
Age	20s	(45)	28.9	31.1	24.4	28.9	11.1	24.4	20.0	28.9	13.3	15.6	11.1	8.9	0.0	8.9
	30s	(70)	31.4	30.0	27.1	25.7	24.3	22.9	37.1	24.3	18.6	11.4	18.6	8.6	0.0	0.0
	40s	(61)	37.7	42.6	34.4	34.4	29.5	27.9	27.9	32.8	24.6	21.3	19.7	26.2	0.0	6.6
	50s	(76)	43.4	51.3	44.7	36.8	35.5	34.2	35.5	27.6	14.5	18.4	14.5	18.4	1.3	5.3
	60 and over	(98)	54.1	43.9	33.7	32.7	43.9	36.7	24.5	20.4	14.3	12.2	9.2	5.1	1.0	1.0
Age and gender	Male 20s	(27)	22.2	25.9	18.5	25.9	14.8	25.9	11.1	25.9	14.8	18.5	11.1	7.4	0.0	7.4
	Male 30s	(45)	24.4	22.2	24.4	22.2	26.7	26.7	33.3	24.4	17.8	6.7	17.8	13.3	0.0	0.0
	Male 40s	(34)	23.5	29.4	32.4	35.3	29.4	32.4	20.6	38.2	29.4	17.6	23.5	35.3	0.0	8.8
	Male 50s	(42)	23.8	35.7	40.5	26.2	31.0	23.8	26.2	19.0	7.1	7.1	11.9	11.9	2.4	9.5
	Male 60 and over	(53)	52.8	28.3	18.9	24.5	45.3	43.4	24.5	15.1	5.7	1.9	11.3	1.9	1.9	1.9
	Female 20s	(18)	38.9	38.9	33.3	33.3	5.6	22.2	33.3	33.3	11.1	11.1	11.1	11.1	0.0	11.1
	Female 30s	(25)	44.0	44.0	32.0	32.0	20.0	16.0	44.0	24.0	20.0	20.0	20.0	20.0	0.0	0.0
	Female 40s	(27)	55.6	59.3	37.0	33.3	29.6	22.2	37.0	25.9	18.5	25.9	14.8	14.8	0.0	3.7
	Female 50s	(34)	67.6	70.6	50.0	50.0	41.2	47.1	47.1	38.2	23.5	32.4	17.6	26.5	0.0	0.0
	Female 60 and over	(45)	55.6	62.2	51.1	42.2	42.2	28.9	24.4	26.7	24.4	24.4	6.7	8.9	0.0	0.0

Respondents: Have visited Indonesia, travel abroad at least once every 3 years, and intend to travel abroad in the future



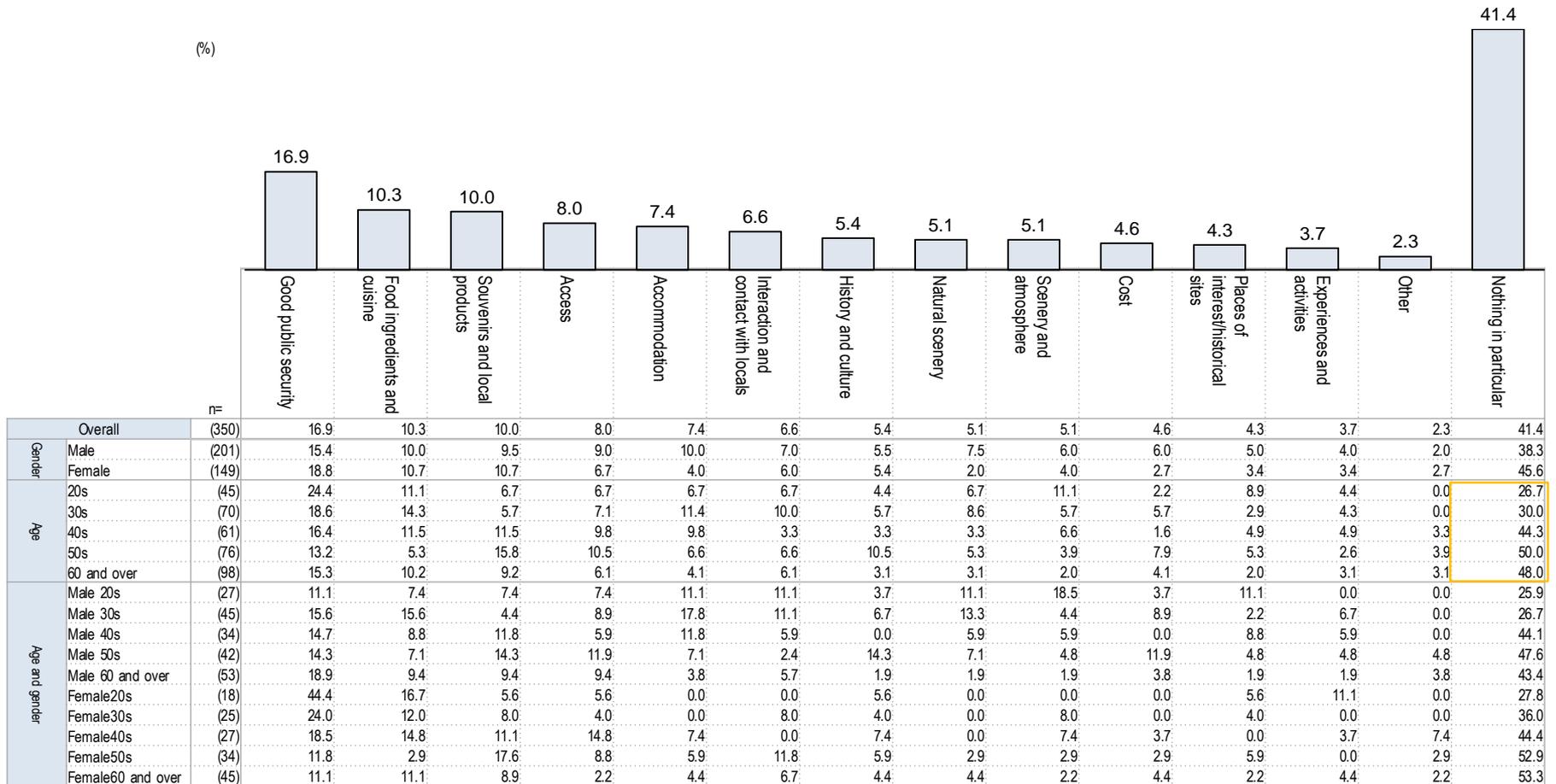
## Survey Results

### 6. [People who have visited] Points of dissatisfaction

- As opposed to the previous page, when asked what they were dissatisfied with upon visiting Indonesia, 16.9% responded “Good public security,” followed by “Food ingredients and cuisine” (10.3%).
- 41.4% of respondents answered that they were dissatisfied with “Nothing in particular,” and although approx. 40% say there was nothing they were dissatisfied with, a higher percentage of people in their 20s and 30s said they were not satisfied compared to all other age groups.

### [People who have visited] Points of dissatisfaction

Q. What were you not really satisfied with when you visited the destination? Please answer everything that applies to each country. [Indonesia]



Respondents: Have visited Indonesia, travel abroad at least once every 3 years, and intend to travel abroad in the future



# Survey Results

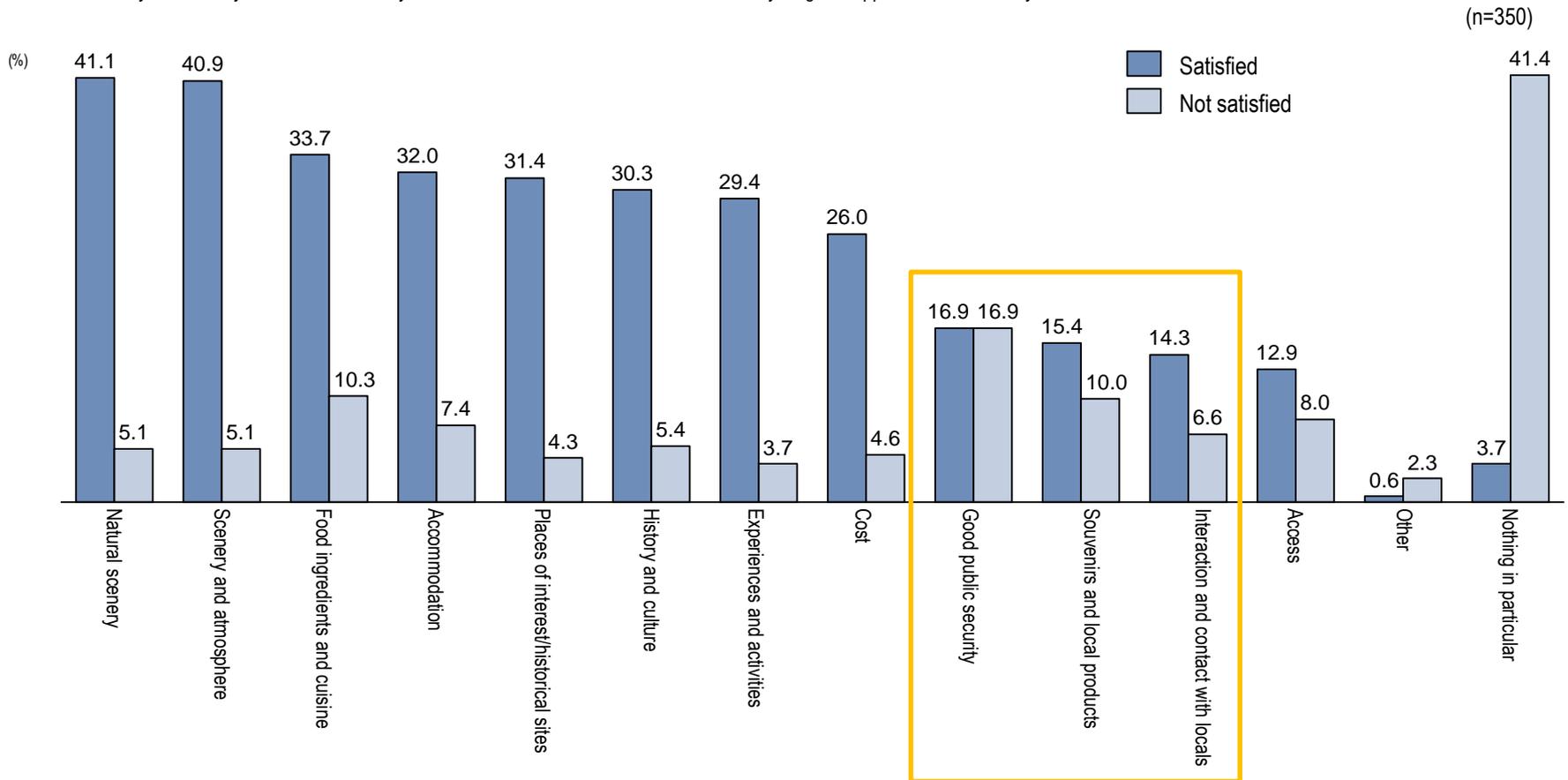
## [Reference] Comparison of points of satisfaction/dissatisfaction

- A comparison of points of satisfaction and points of dissatisfaction showed a higher response rate for “Satisfied,” indicating that the level of satisfaction is high overall. The level of satisfaction could be further improved if measures were taken to alleviate concern regarding public security, souvenirs and local products were enhanced, opportunities to interact with locals were created, etc.

### [People who have visited] Points of satisfaction/dissatisfaction

Q. What were you satisfied with when you visited the destination? Please answer everything that applies to each country. [Indonesia]

Q. What were you not really satisfied with when you visited the destination? Please answer everything that applies to each country. [Indonesia]





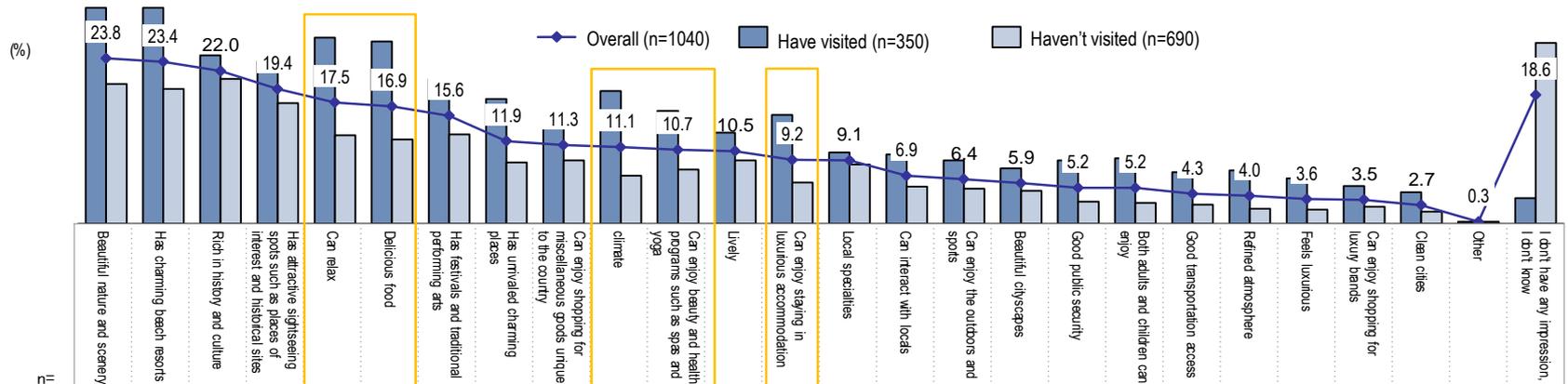
# Survey Results

## 7. Impression of Indonesia

- When all respondents were asked their impression of Indonesia, most (23.8%) answered “Beautiful nature and scenery” followed by “Has charming beach resorts” (23.4%).
- A high percentage of respondents who’d visited Indonesia before answered “Can relax,” “Delicious food,” “Pleasant climate,” “Can stay in luxurious accommodation” etc. indicating a need to communicate the appeal of Indonesia to people who’ve never visited as well.

### Impression of Indonesia

Q. What are your impressions of the following 10 countries? Please answer everything that applies to each country. [Indonesia]



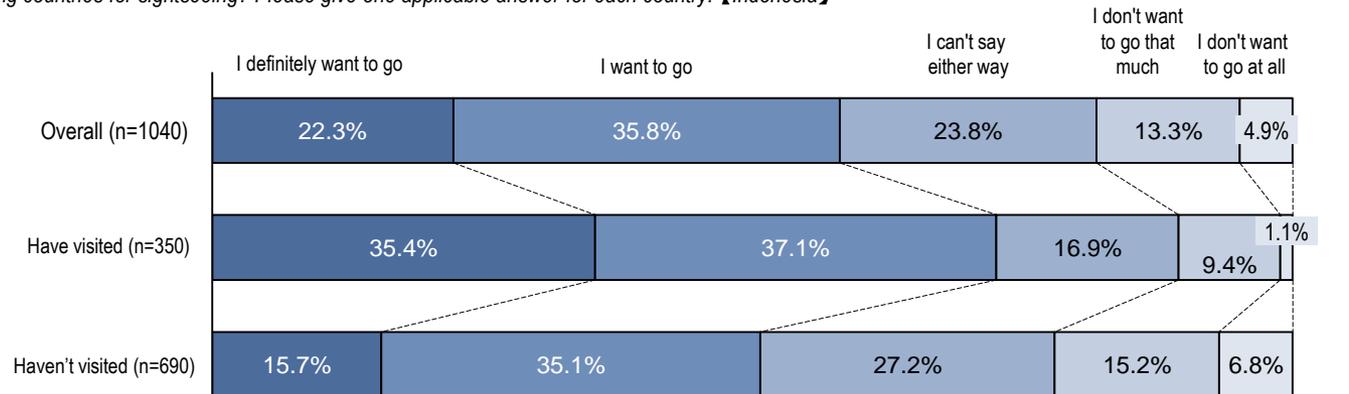
		n=	Beautiful nature and scenery	Has charming beach resorts	Rich in history and culture	Has attractive sightseeing spots such as places of interest and historical sites	Can relax	Delicious food	Has festivals and traditional performing arts	Has unrivaled charming places	Has miscellaneous goods unique to the country	Can enjoy shopping for miscellaneous goods	Pleasant climate	Can enjoy beauty and health programs such as spa and yoga	Lively	Can enjoy staying in luxurious accommodation	Local specialties	Can interact with locals	Can enjoy the outdoors and sports	Beautiful cityscapes	Good public security	Both adults and children can enjoy	Good transportation access	Refined atmosphere	Feels luxurious	Can enjoy shopping for luxury brands	Clean cities	Other	I don't have any impression
Overall	(1,040)	23.8	23.4	22.0	19.4	17.5	16.9	15.6	11.9	11.3	11.1	10.7	10.5	9.2	9.1	6.9	6.4	5.9	5.2	5.2	4.3	4.0	3.6	3.5	2.7	0.3	18.6		
Gender	Male (577)	23.1	23.2	21.0	19.4	17.0	17.3	15.3	12.0	9.5	10.9	8.3	10.2	8.5	9.5	6.6	7.8	6.4	5.0	5.4	5.4	4.7	4.0	4.0	3.5	0.3	15.8		
	Female (463)	24.8	23.5	23.3	19.4	18.1	16.4	16.0	11.9	13.6	11.2	13.6	10.8	10.2	8.6	7.3	4.8	5.2	5.4	5.0	3.0	3.2	3.0	1.9	1.7	0.2	22.0		
Age	20s (162)	10.5	17.9	17.3	11.7	13.6	11.7	16.7	11.1	10.5	5.6	8.6	11.7	6.2	9.3	8.6	6.8	8.6	5.6	3.1	5.6	3.7	4.3	3.1	4.3	0.0	18.5		
	30s (192)	23.4	23.4	21.9	15.6	16.7	19.3	13.0	12.5	10.9	8.3	15.6	12.0	12.0	9.9	5.7	5.2	5.7	7.3	5.2	5.7	3.6	6.8	3.6	6.8	0.0	12.5		
	40s (192)	28.6	24.0	22.4	16.7	22.9	22.4	19.3	12.0	10.9	11.5	12.5	12.5	8.9	10.9	9.4	8.9	6.8	6.8	6.3	5.7	4.7	5.2	4.2	3.1	0.5	15.6		
	50s (212)	25.9	29.2	25.5	27.8	20.8	17.5	13.7	10.8	15.1	15.1	10.8	10.8	13.2	10.8	8.0	9.4	4.7	5.2	6.1	5.7	5.2	3.3	3.3	1.9	0.5	20.8		
	60 and over (282)	27.0	21.6	22.0	22.0	14.2	14.2	15.6	12.8	9.6	12.8	7.1	7.1	6.4	6.0	4.3	3.2	4.6	3.5	3.5	1.1	1.8	2.1	1.1	1.4	0.4	23.0		
Age and gender	Male 20s (81)	12.3	16.0	19.8	12.3	16.0	11.1	16.0	12.3	13.6	6.2	9.9	12.3	6.2	12.3	12.3	11.1	11.1	7.4	4.9	11.1	6.2	6.2	6.2	6.2	7.4	0.0	9.9	
	Male 30s (112)	20.5	21.4	17.9	12.5	16.1	21.4	16.1	12.5	9.8	7.1	8.0	13.4	14.3	9.8	5.4	6.3	8.9	5.4	8.0	7.1	8.0	5.4	8.9	4.5	0.0	6.3		
	Male 40s (102)	25.5	22.5	17.6	17.6	22.5	24.5	21.6	11.8	10.8	14.7	12.7	12.7	8.8	11.8	10.8	11.8	6.9	7.8	5.9	6.9	6.9	4.9	6.9	4.9	1.0	13.7		
	Male 50s (123)	25.2	28.5	26.8	26.8	17.1	16.3	9.8	8.9	11.4	13.0	8.9	9.8	9.8	8.1	5.7	8.1	4.1	4.1	4.1	4.9	4.1	1.6	2.4	1.6	0.0	18.7		
	Male 60 and over (159)	27.0	24.5	21.4	23.3	14.5	13.8	14.5	13.8	5.0	11.9	4.4	5.7	4.4	7.5	2.5	4.4	3.8	2.5	4.4	0.6	0.6	3.1	1.3	1.3	0.6	24.5		
	Female 20s (81)	8.6	19.8	14.8	11.1	11.1	12.3	17.3	9.9	7.4	4.9	7.4	11.1	6.2	6.2	4.9	2.5	6.2	3.7	1.2	0.0	1.2	2.5	0.0	1.2	0.0	27.2		
Female 30s (80)	27.5	26.3	27.5	20.0	17.5	16.3	8.8	12.5	12.5	10.0	26.3	10.0	8.8	10.0	6.3	3.8	1.3	6.3	6.3	2.5	2.5	1.3	3.8	2.5	0.0	21.3			
Female 40s (90)	32.2	25.6	27.8	15.6	23.3	20.0	16.7	12.2	11.1	7.8	12.2	12.2	8.9	10.0	7.8	5.6	6.7	5.6	6.7	4.4	2.2	5.6	1.1	1.1	0.0	17.8			
Female 50s (89)	27.0	30.3	23.6	29.2	25.8	19.1	19.1	13.5	20.2	18.0	13.5	12.4	18.0	14.6	11.2	11.2	5.6	6.7	9.0	6.7	6.7	5.6	4.5	2.2	1.1	23.6			
Female 60 and over (123)	26.8	17.9	22.8	20.3	13.8	14.6	17.1	11.4	15.4	13.8	10.6	8.9	8.9	4.1	6.5	1.6	5.7	4.9	2.4	1.6	3.3	0.8	0.8	1.6	0.0	21.1			
Visited/Not visited	Have visited (350)	31.1	31.1	24.3	23.4	26.9	26.3	20.9	18.0	15.7	19.1	16.3	13.1	15.7	10.3	10.0	9.1	8.0	9.1	9.4	7.4	7.7	6.6	5.4	4.6	0.3	3.7		
	Haven't visited (690)	20.1	19.4	20.9	17.4	12.8	12.2	12.9	8.8	9.1	7.0	7.8	9.1	5.9	8.6	5.4	5.1	4.8	3.2	3.0	2.8	2.2	2.0	2.5	1.7	0.3	26.1		



- Regarding intention to travel to Indonesia, 58.1% of all respondents answered that they wanted to go. (“Definitely want to go” & “I want to go.”)
- A comparison of people who’d visited before with those who had not showed that people who had visited before had a strong desire to visit again at 72.5% and in particular, this trend was high for both males and females in their 40s.

### Intention to visit Indonesia (sightseeing)

Q. Would you like to travel to the following countries for sightseeing? Please give one applicable answer for each country. **[Indonesia]**



		n=	I definitely want to go	I want to go	I can't say either way	I don't want to go that much	I don't want to go at all	(%)
	Overall	(1,040)	22.3	35.8	23.8	13.3	4.9	
Gender	Male	(577)	22.4	38.6	23.9	12.0	3.1	
	Female	(463)	22.2	32.2	23.5	14.9	7.1	
Age	20s	(162)	20.4	37.0	25.3	13.0	4.3	
	30s	(192)	25.0	34.9	24.5	12.0	3.6	
	40s	(192)	32.3	30.2	20.3	9.4	7.8	
	50s	(212)	22.6	35.4	23.6	13.2	5.2	
	60 and over	(282)	14.5	39.7	24.8	17.0	3.9	
	Age and gender	Male 20s	(81)	22.2	40.7	23.5	11.1	2.5
Male 30s		(112)	25.9	35.7	25.9	10.7	1.8	
Male 40s		(102)	30.4	34.3	20.6	8.8	5.9	
Male 50s		(123)	21.1	40.7	24.4	9.8	4.1	
Male 60 and over		(159)	15.7	40.9	24.5	17.0	1.9	
Female 20s		(81)	18.5	33.3	27.2	14.8	6.2	
Female 30s		(80)	23.8	33.8	22.5	13.8	6.3	
Female 40s		(90)	34.4	25.6	20.0	10.0	10.0	
Female 50s		(89)	24.7	28.1	22.5	18.0	6.7	
Female 60 and over		(123)	13.0	38.2	25.2	17.1	6.5	
Visited N of visited	Have visited	(350)	35.4	37.1	16.9	9.4	1.1	
	Haven't visited	(690)	15.7	35.1	27.2	15.2	6.8	



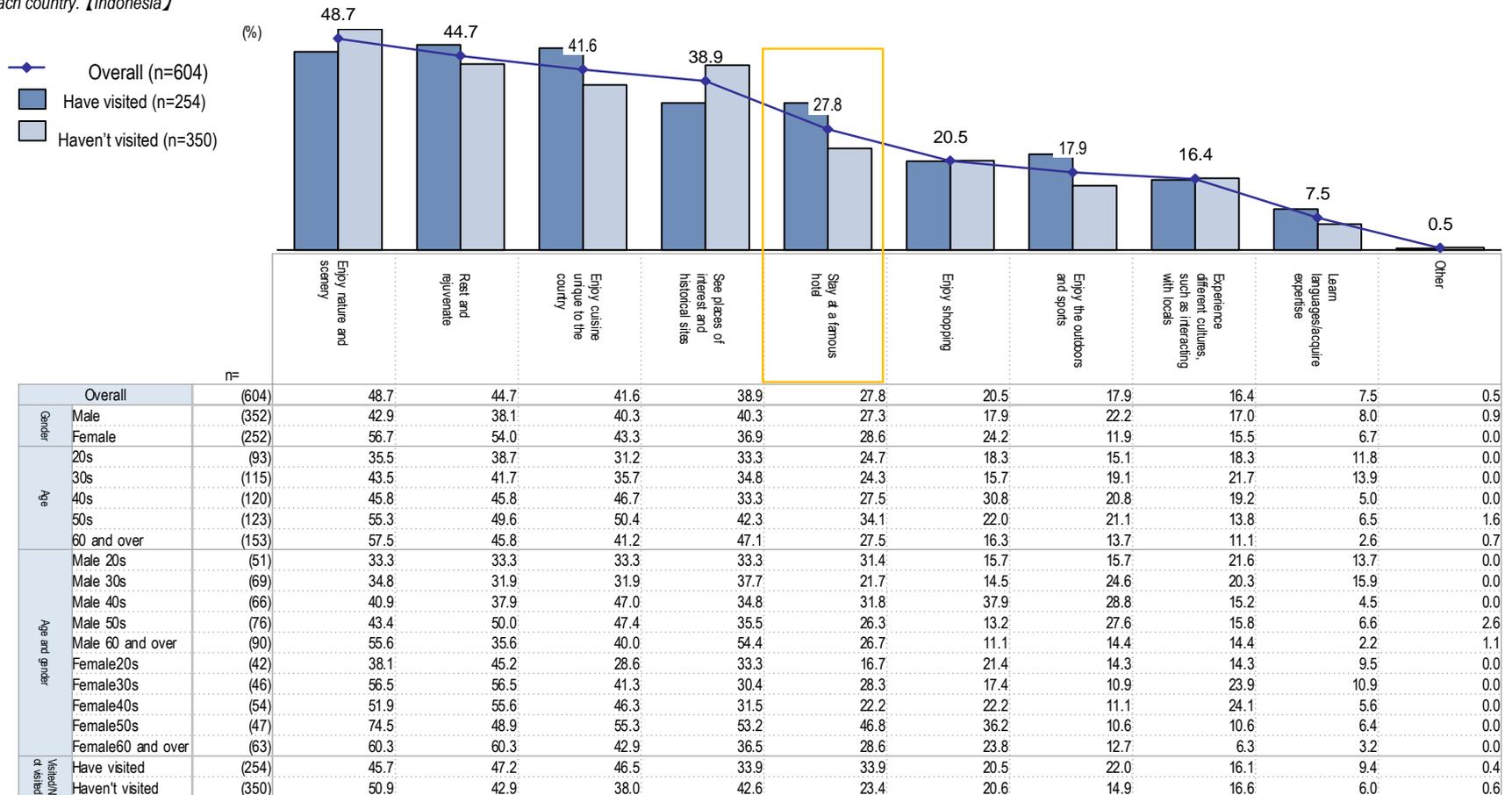
# Survey Results

## 9. [People with intention to visit] What respondent wants to do at destination

- When those respondents who answered “I definitely want to go” or “I want to go” in the previous question were asked what they want to do in Indonesia, most answered “Enjoy nature and scenery” (48.7%), followed by “Rest and rejuvenate” (44.7%). For all items, females expressed a greater desire to do so than males. Also, a high percentage of people who’d visited before answered “Want to stay in a famous hotel,” revealing that there is an awareness that good-quality accommodation exists.

### [People with intention to visit] What respondent wants to do at destination

Q. This question is for respondents who answered "I definitely want to go" or "I want to go" in the previous question. What would you like to do if you take a sightseeing trip to the country? Please give all applicable answers for each country. **[Indonesia]**





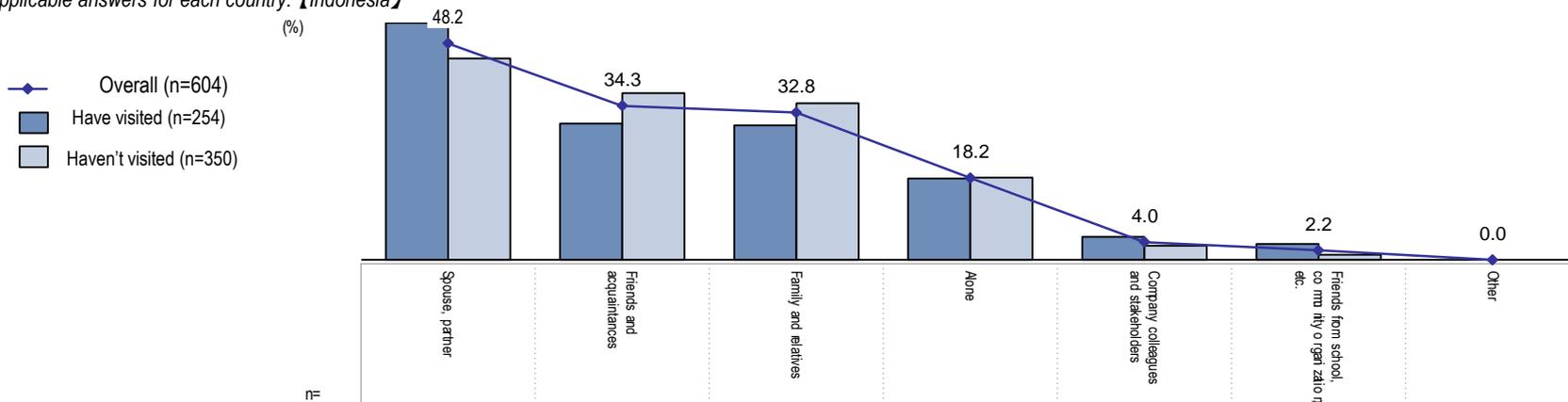
# Survey Results

## 10. [People with intention to visit] Who respondent wants to go with (Travel companion)

- When asked who they'd like to travel to Indonesia with, the highest percentage of respondents answered "Spouse/partner" (48.2%), followed by "Friends and acquaintances" at 34.3 %, then "Family and relatives" (32.8%).

### [People with intention to visit] Preferred travel companion to Indonesia

Q. This question is for respondents who answered "I definitely want to go" or "I want to go" in the previous question. If you were to make the trip, who would you like to travel with? Please give all applicable answers for each country. **[Indonesia]**



		n=	Spouse/partner	Friends and acquaintances	Family and relatives	Alone	Company, colleagues and stakeholders	Friends from school, community or organization etc.	Other
Overall		(604)	48.2	34.3	32.8	18.2	4.0	2.2	0.0
Gender	Male	(352)	51.4	26.7	30.7	21.6	5.4	2.6	0.0
	Female	(252)	43.7	44.8	35.7	13.5	2.0	1.6	0.0
Age	20s	(93)	29.0	57.0	31.2	20.4	7.5	6.5	0.0
	30s	(115)	47.0	32.2	32.2	12.2	5.2	4.3	0.0
	40s	(120)	43.3	32.5	40.8	25.8	1.7	0.0	0.0
	50s	(123)	52.8	30.9	34.1	21.1	6.5	1.6	0.0
	60 and over	(153)	60.8	26.1	26.8	13.1	0.7	0.0	0.0
Age and gender	Male 20s	(51)	37.3	47.1	29.4	29.4	11.8	7.8	0.0
	Male 30s	(69)	46.4	24.6	34.8	14.5	8.7	7.2	0.0
	Male 40s	(66)	48.5	24.2	42.4	24.2	1.5	0.0	0.0
	Male 50s	(76)	55.3	22.4	27.6	28.9	7.9	0.0	0.0
	Male 60 and over	(90)	62.2	22.2	22.2	14.4	0.0	0.0	0.0
	Female 20s	(42)	19.0	69.0	33.3	9.5	2.4	4.8	0.0
	Female 30s	(46)	47.8	43.5	28.3	8.7	0.0	0.0	0.0
	Female 40s	(54)	37.0	42.6	38.9	27.8	1.9	0.0	0.0
	Female 50s	(47)	48.9	44.7	44.7	8.5	4.3	4.3	0.0
	Female 60 and over	(63)	58.7	31.7	33.3	11.1	1.6	0.0	0.0
Visited/Not visited	Have visited	(254)	52.8	30.3	29.9	18.1	5.1	3.5	0.0
	Haven't visited	(350)	44.9	37.1	34.9	18.3	3.1	1.1	0.0



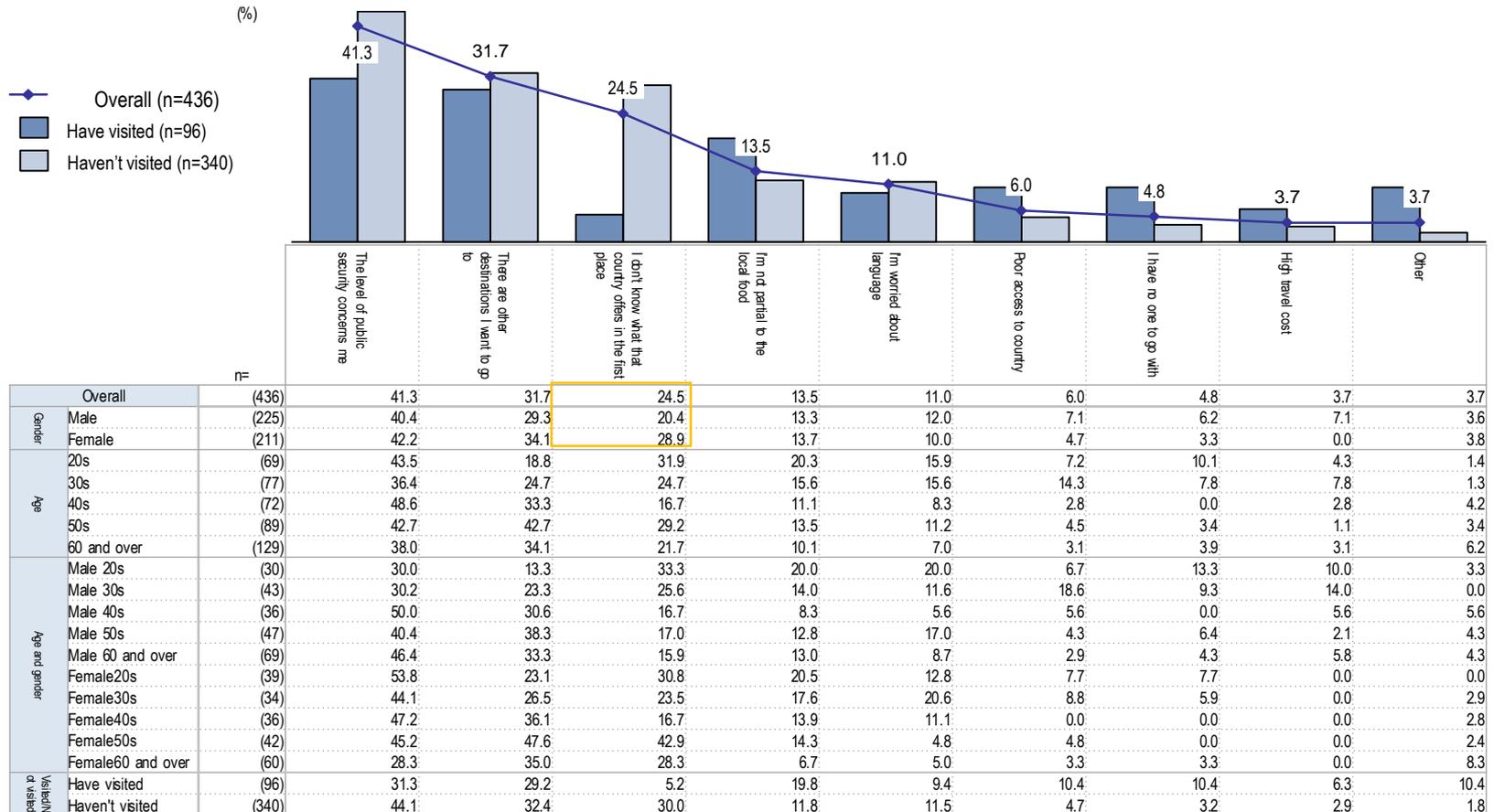
# Survey Results

## 11. [People with no intention to visit] Reasons for having no intention to visit

- When respondents who answered "I can't say either way," "I don't want to go that much," or "I don't want to go at all" regarding their intention to visit Indonesia were asked the reason why, the highest percentage answered "The level of public security concerns me" (41.3%).
- 24.5% of respondents answered "I don't know what that country offers in the first place, with more females than males giving this response (Male: 20.4%, female: 28.9%), and the younger age groups having a higher response rate.

### [People with no intention to visit] Reasons for having no intention to visit Indonesia

Q. This question is for respondents who answered "I can't say either way," "I don't want to go that much," or "I don't want to go at all" in the previous question. Why don't you want to take a sightseeing trip to that destination? Please give all applicable answers for each country. [Indonesia]





# Survey Results

## 12. Awareness of tourism resources

- When asked their level of awareness of Indonesia’s major five tourism resources, the highest percentage of respondents (66.4%) answered ‘I’ve heard of it and I know what kind of place it is’ for Bali.
- Excluding Bali, males had higher awareness of the remaining four tourism resources. The response of “I’ve never heard of it, I don’t know” was particularly low for males in their 20s compared to other age groups.

### Awareness of tourism resources

Q. Do you know the following places and tourist spots? Please give one applicable answer for each. [Indonesia]

		Bali			Lake Toba (Sumatra)			Lombok Island (Mandalika)			Borobudur (Yogyakarta)			Komodo Island (Labuan Bajo)			
		n=	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.	I've heard of it and I know what kind of place it is.	I've heard of it, but I don't know what kind of place it is.	I've never heard of it, I don't know.
	Overall	(1,040)	66.4	29.2	4.3	12.0	25.9	62.1	11.9	25.2	62.9	20.9	24.2	54.9	15.8	27.1	57.1
Gender	Male	(577)	66.9	27.9	5.2	13.9	26.7	59.4	13.3	31.0	55.6	21.7	28.2	50.1	18.7	30.0	51.3
	Female	(463)	65.9	30.9	3.2	9.7	24.8	65.4	10.2	17.9	71.9	19.9	19.2	60.9	12.1	23.5	64.4
Age	20s	(162)	59.9	30.9	9.3	13.6	31.5	54.9	9.9	24.7	65.4	13.0	31.5	55.6	9.3	29.6	61.1
	30s	(192)	60.4	33.9	5.7	14.1	30.7	55.2	12.0	25.0	63.0	16.1	25.5	58.3	20.3	27.6	52.1
	40s	(192)	71.9	24.5	3.6	15.1	22.9	62.0	11.5	29.7	58.9	19.3	24.0	56.8	16.7	25.0	58.3
	50s	(212)	71.2	25.5	3.3	12.7	24.1	63.2	14.6	25.5	59.9	22.6	23.6	53.8	20.3	25.0	54.7
	60 and over	(282)	67.0	31.2	1.8	7.1	22.7	70.2	11.3	22.3	66.3	28.4	19.9	51.8	12.4	28.4	59.2
Age and gender	Male 20s	(81)	58.0	28.4	13.6	24.7	33.3	42.0	14.8	38.3	46.9	17.3	43.2	39.5	16.0	37.0	46.9
	Male 30s	(112)	60.7	32.1	7.1	13.4	37.5	49.1	14.3	31.3	54.5	17.0	32.1	50.9	22.3	33.0	44.6
	Male 40s	(102)	74.5	21.6	3.9	16.7	26.5	56.9	11.8	36.3	52.0	21.6	24.5	53.9	20.6	24.5	54.9
	Male 50s	(123)	70.7	26.0	3.3	13.8	19.5	66.7	13.8	28.5	57.7	20.3	26.8	52.8	19.5	26.8	53.7
	Male 60 and over	(159)	67.9	30.2	1.9	6.9	21.4	71.7	12.6	25.8	61.6	28.3	21.4	50.3	15.7	30.2	54.1
	Female 20s	(81)	61.7	33.3	4.9	2.5	29.6	67.9	4.9	11.1	84.0	8.6	19.8	71.6	2.5	22.2	75.3
	Female 30s	(80)	60.0	36.3	3.8	15.0	21.3	63.8	8.8	16.3	75.0	15.0	16.3	68.8	17.5	20.0	62.5
	Female 40s	(90)	68.9	27.8	3.3	13.3	18.9	67.8	11.1	22.2	66.7	16.7	23.3	60.0	12.2	25.6	62.2
	Female 50s	(89)	71.9	24.7	3.4	11.2	30.3	58.4	15.7	21.3	62.9	25.8	19.1	55.1	21.3	22.5	56.2
	Female 60 and over	(123)	65.9	32.5	1.6	7.3	24.4	68.3	9.8	17.9	72.4	28.5	17.9	53.7	8.1	26.0	65.9
Visited/Not visited	Have visited	(350)	82.9	13.7	3.4	18.6	31.4	50.0	24.6	36.3	39.1	37.7	27.7	34.6	27.1	31.4	41.4
	Haven't visited	(690)	58.1	37.1	4.8	8.7	23.0	68.3	5.5	19.6	74.9	12.3	22.5	65.2	10.0	24.9	65.1



# Survey Results

## 13. Photo preference

- When we asked respondents to choose the photo of Indonesia they like the most out of three photos, the photo of Mandalika (Lombok Island) was most popular overall (45.8%), and particularly supported by females aged in their 20s through 50s.
- The most popular photo amongst males in their 20s and males/females 60 and over was ① Balinese Dance, while ② Komodo had a high response rate amongst males in their 30s and 40s.

### Photo preference (Indonesia)

Q. There are 3 photos for each of the following 10 countries. Which photo do you like the most? Please tell us which photo you like the most for each country.

**[Indonesia]**

(%)

① Balinese Dance



② Komodo



③ Mandalika (Lombok Island)



If n > 30  
[Difference in ratio]

■ Total -10 points  
■ Total +5 points  
■ Total -5 points  
■ Total -10 points

		n=	① Balinese Dance	② Komodo	③ Mandalika (Lombok Island)
Overall		(1,040)	34.6	19.6	45.8
Gender	Male	(577)	36.7	22.2	41.1
	Female	(463)	32.0	16.4	51.6
Age	20s	(162)	42.0	11.1	46.9
	30s	(192)	24.5	26.0	49.5
	40s	(192)	32.3	24.0	43.8
	50s	(212)	31.6	17.9	50.5
	60 and over	(282)	41.1	18.4	40.4
	Age and gender	Male 20s	(81)	51.9	16.0
Male 30s		(112)	26.8	28.6	44.6
Male 40s		(102)	37.3	26.5	36.3
Male 50s		(123)	31.7	19.5	48.8
Male 60 and over		(159)	39.6	20.1	40.3
Female 20s		(81)	32.1	6.2	61.7
Female 30s		(80)	21.3	22.5	56.3
Female 40s		(90)	26.7	21.1	52.2
Female 50s		(89)	31.5	15.7	52.8
Female 60 and over		(123)	43.1	16.3	40.7
Visited/Not Visited	Have visited	(350)	36.3	20.9	42.9
	Haven't visited	(690)	33.8	19.0	47.2