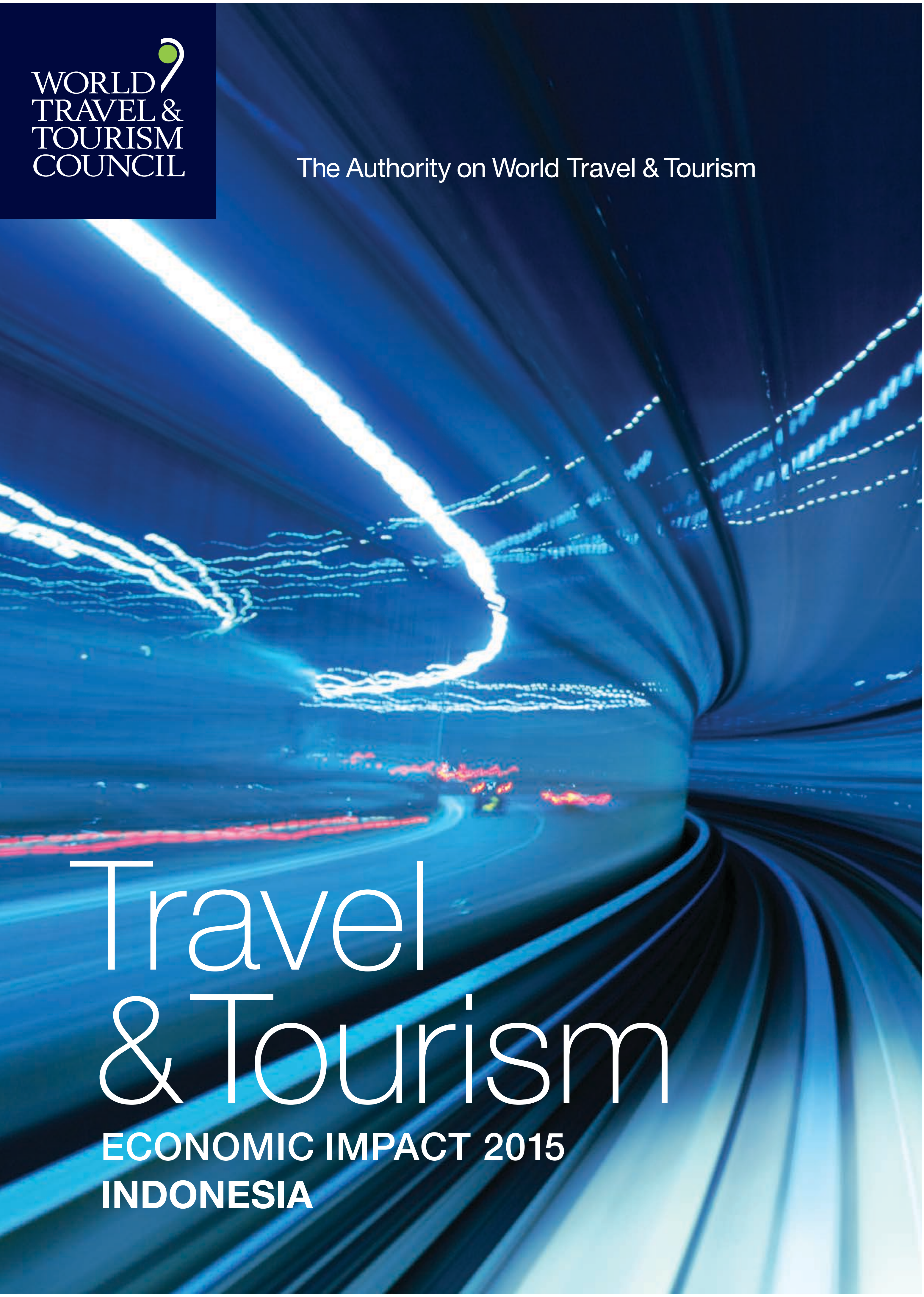
WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism



Travel & Tourism

ECONOMIC IMPACT 2015
INDONESIA

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Foreword

The World Travel & Tourism Council (WTTC) is the global authority on the economic and social contribution of Travel & Tourism. WTTC promotes sustainable growth for the sector, working with governments and international institutions to create jobs, to drive exports and to generate prosperity.

Travel & Tourism's impact on the economic and social development of a country can be enormous; opening it up for business, trade and capital investment, creating jobs and entrepreneurialism for the workforce and protecting heritage and cultural values. To fully understand its impact, however, governments, policy makers and businesses around the world require accurate and reliable data on the impact of the sector. Data is needed to help assess policies that govern future industry development and to provide knowledge to help guide successful and sustainable Travel & Tourism investment decisions.

For 25 years, WTTC has been quantifying the economic impact of Travel & Tourism. This year, the 2015 Annual Economic Reports cover 184 countries and 25 regions of the world, including, for the first time, the Pacific Alliance.

Travel & Tourism generated US$7.6 trillion (10% of global GDP) and 277 million jobs (1 in 11 jobs) for the global economy in 2014. Recent years have seen Travel & Tourism growing at a faster rate than both the wider economy and other significant sectors such as automotive, financial services and health care. Last year was no exception. International tourist arrivals also surged, reaching nearly 1.14billion and visitor spending more than matched that growth. Visitors from emerging economies now represent a 46% share of these international arrivals (up from 38% in 2000), proving the growth and increased opportunities for travel from those in these new markets.

The sector faces challenges every year and this year is likely to be no different. The weakness and potential volatility of many currencies against the US dollar and a deep recession in Russia, a key outbound market, will slow outbound spending in line with slower world trade overall in 2015. However, falling oil prices will bring significant improvements for net oil importers in 2015, easing upward pressure on living costs, increasing disposable household incomes and domestic consumer spending, and lowering air fares. As a result, Travel & Tourism expansion is forecast to continue at a stronger rate than last year, with the total contribution to GDP expected to increase by 3.7%. New destinations and investment opportunities will also continue to emerge as tourism becomes increasingly affordable across the developing world. This growth will require countries to adopt a concerted and coordinated approach to talent planning and development between their industry, governments and educational institutions to ensure they fulfil their potential in the years ahead.

WTTC is proud to continue to provide this clear and empirical data in order to help both public and private bodies make the right decisions for the future growth of a sustainable Travel & Tourism sector.

David Scowsill

David Scowsill
President & CEO
WTTC

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The Economic Impact of Travel & Tourism 2015

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Indonesia

2015 ANNUAL RESEARCH: KEY FACTS[1]

2015 forecast

GDP: DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP was IDR325,467.0bn (3.2% of total GDP) in 2014, and is forecast to rise by 6.0% in 2015, and to rise by 5.3% pa, from 2015-2025, to IDR581,091.0bn (3.2% of total GDP) in 2025.

GDP: TOTAL CONTRIBUTION

The total contribution of Travel & Tourism to GDP was IDR946,087.0bn (9.3% of GDP) in 2014, and is forecast to rise by 7.0% in 2015, and to rise by 5.9% pa to IDR1,791,620.0bn (9.9% of GDP) in 2025.

EMPLOYMENT: DIRECT CONTRIBUTION

In 2014 Travel & Tourism directly supported 3,326,000 jobs (2.9% of total employment). This is expected to rise by 2.3% in 2015 and rise by 1.4% pa to 3,905,000 jobs (2.9% of total employment) in 2025.

EMPLOYMENT: TOTAL CONTRIBUTION

In 2014, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 8.4% of total employment (9,814,000 jobs). This is expected to rise by 3.3% in 2015 to 10,140,500 jobs and rise by 1.8% pa to 12,127,000 jobs in 2025 (8.9% of total).

VISITOR EXPORTS

Visitor exports generated IDR132,159.0bn (5.6% of total exports) in 2014. This is forecast to grow by 5.5% in 2015, and grow by 5.5% pa, from 2015-2025, to IDR238,606.0bn in 2025 (6.5% of total).

INVESTMENT

Travel & Tourism investment in 2014 was IDR167,435.0bn, or 5.3% of total investment. It should rise by 5.7% in 2015, and rise by 7.1% pa over the next ten years to IDR352,910.0bn in 2025 (6.0% of total).

[1]All values are in constant 2014 prices & exchange rates

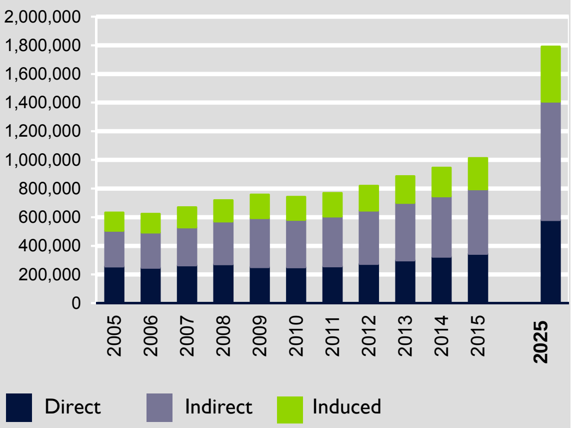
WORLD RANKING (OUT OF 184 COUNTRIES):

Relative importance of Travel & Tourism's total contribution to GDP

17	94	12	27
ABSOLUTE	RELATIVE SIZE	GROWTH	LONG-TERM GROWTH
Size in 2014	Contribution to GDP in 2014	2015 forecast	Forecast 2015-2025

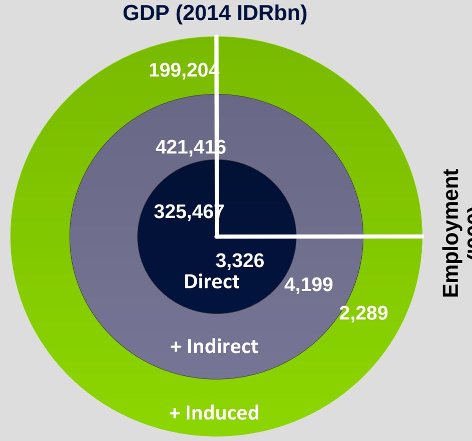
Total Contribution of Travel & Tourism to GDP

2014 IDRbn



Breakdown of Travel & Tourism's Total Contribution to GDP and Employment 2014

GDP (2014 IDRbn)



= Total contribution of Travel & Tourism

Defining the economic contribution of Travel & Tourism

Travel & Tourism is an important economic activity in most countries around the world. As well as its direct economic impact, the sector has significant indirect and induced impacts. The UN Statistics Division-approved Tourism Satellite Accounting methodology (TSA:RMF 2008) quantifies only the direct contribution of Travel & Tourism. WTTC recognises that Travel & Tourism's total contribution is much greater however, and aims to capture its indirect and induced impacts through its annual research.

DIRECT Travel & Tourism contribution

COMMONDITIES

- Accommodation
- Transportation
- Entertainment
- Attractions

INDUSTRIES

- Accommodation services
- Food & beverage services
- Retail Trade
- Transportation services
- Cultural, sports & recreational services

SOURCES OF SPENDING

- Residents' domestic T&T spending
- Businesses' domestic travel spending
- Visitor exports
- Individual government T&T spending

INDIRECT Travel & Tourism contribution

- T&T investment spending
- Government collective T&T spending
- Impact of purchases from suppliers

INDUCED contribution (spending of direct and indirect employees)

- Food and beverages
- Recreation
- Clothing
- Housing
- Household goods

TOTAL Travel & Tourism contribution

- To GDP
- To employment

DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP reflects the 'internal' spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-residents for business and leisure purposes) as well as government 'individual' spending - spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).

The direct contribution of Travel & Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, of tourism-characteristic sectors such as hotels, airlines, airports, travel agents and leisure and recreation services that deal directly with tourists.The direct contribution of Travel & Tourism to GDP is calculated from total internal spending by 'netting out' the purchases made by the different tourism industries. This measure is consistent with the definition of Tourism GDP, specified in the 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008).

TOTAL CONTRIBUTION

The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by:

- Travel & Tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
- Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the 'community at large' – eg tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc;
- Domestic purchases of goods and services by the sectors dealing directly with tourists - including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents.

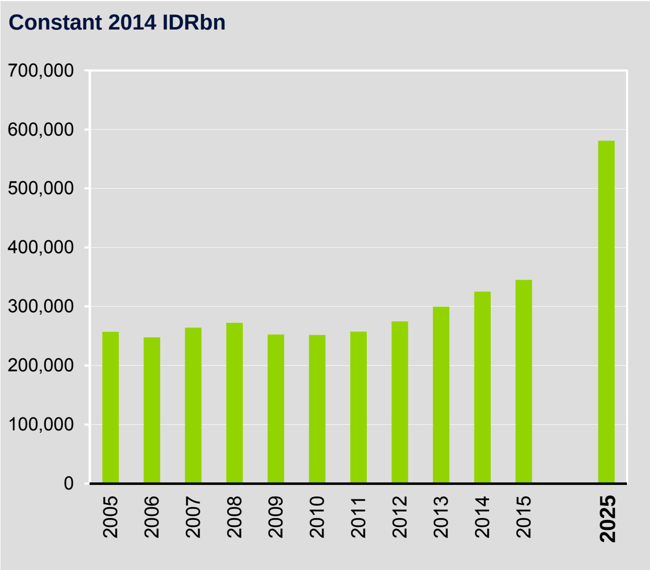
The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism sector.

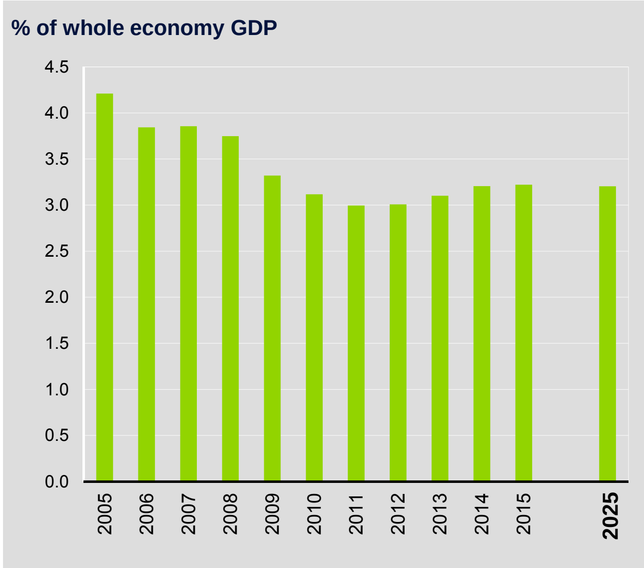
Travel & Tourism's contribution to GDP[1]

The direct contribution of Travel & Tourism to GDP in 2014 was IDR325,467.0bn (3.2% of GDP). This is forecast to rise by 6.0% to IDR345,102.0bn in 2015.This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported

The direct contribution of Travel & Tourism to GDP is expected to grow by 5.3% pa to IDR581,091.0bn (3.2% of GDP) by 2025.

INDONESIA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP

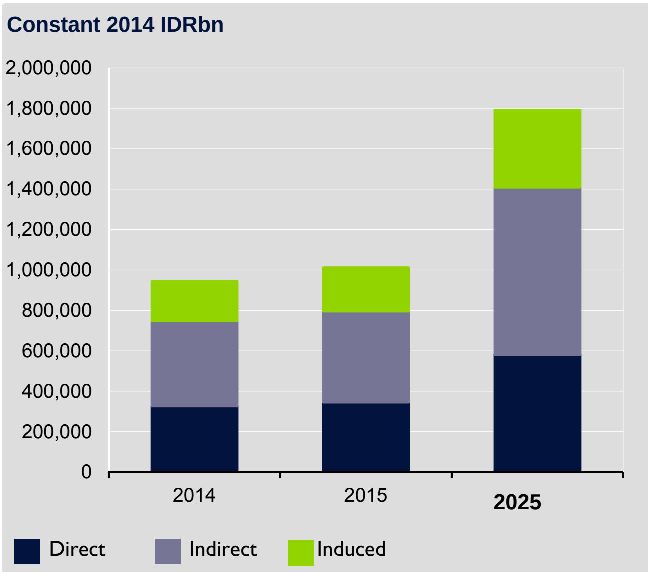


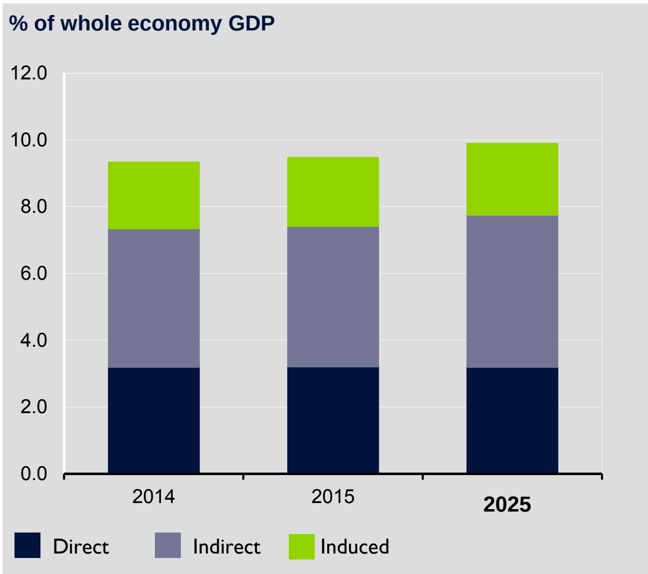


The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was IDR946,087.0bn in 2014 (9.3% of GDP) and is expected to grow by 7.0% to IDR1,012,770.0bn (9.5% of GDP) in 2015.

It is forecast to rise by 5.9% pa to IDR1,791,620.0bn by 2025 (9.9% of GDP).

INDONESIA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP





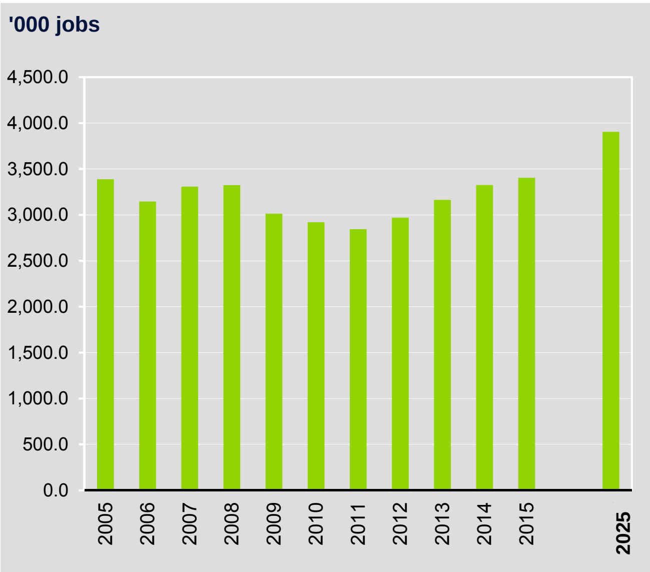
[1] All values are in constant 2014 prices & exchange rates

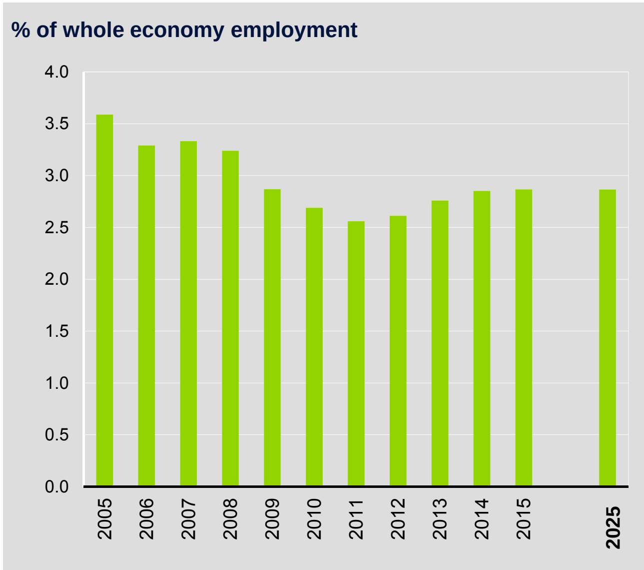
Travel & Tourism's contribution to employment

Travel & Tourism generated 3,326,000 jobs directly in 2014 (2.9% of total employment) and this is forecast to grow by 2.3% in 2015 to 3,404,000 (2.9% of total employment).
This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

By 2025, Travel & Tourism will account for 3,905,000 jobs directly, an increase of 1.4% pa over the next ten years.

INDONESIA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

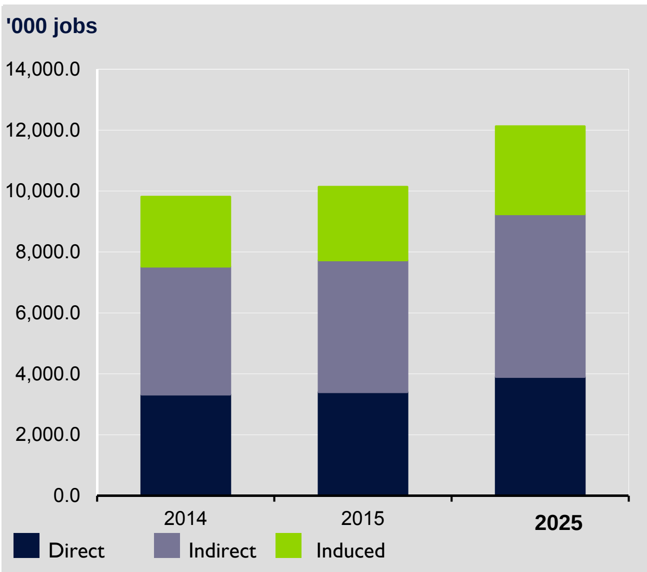


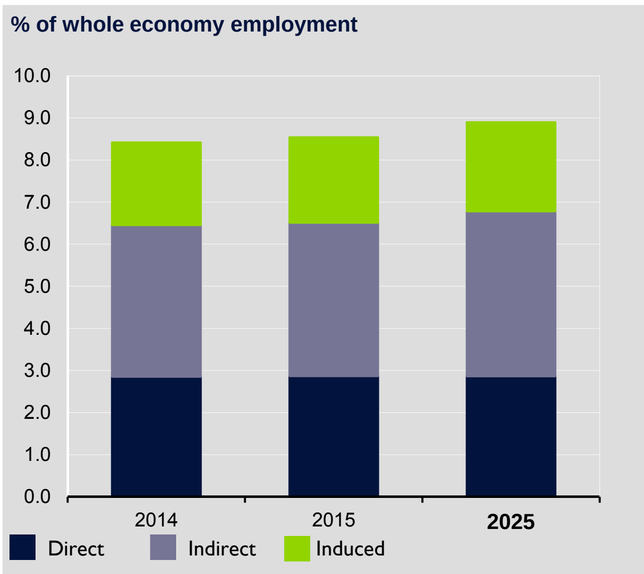


The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 2) was 9,814,000 jobs in 2014 (8.4% of total employment). This is forecast to rise by 3.3% in 2015 to 10,140,500 jobs (8.5% of total employment).

By 2025, Travel & Tourism is forecast to support 12,127,000 jobs (8.9% of total employment), an increase of 1.8% pa over the period.

INDONESIA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT





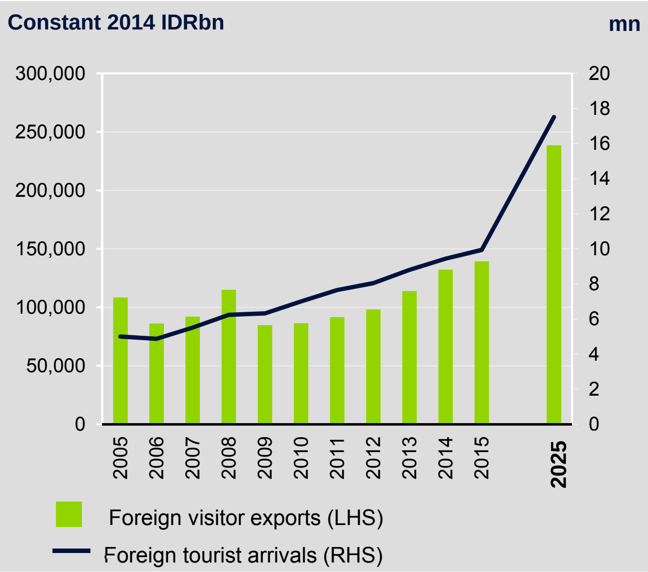
Visitor Exports and Investment[1]

VISITOR EXPORTS

Money spent by foreign visitors to a country (or visitor exports) is a key component of the direct contribution of Travel & Tourism. In 2014, Indonesia generated IDR132,159.0bn in visitor exports.
In 2015, this is expected to grow by 5.5%, and the country is expected to attract 9,938,000 international tourist arrivals.

By 2025, international tourist arrivals are forecast to total 17,512,000, generating expenditure of IDR238,606.0bn, an increase of 5.5% pa.

INDONESIA: VISITOR EXPORTS AND INTERNATIONAL TOURIST ARRIVALS

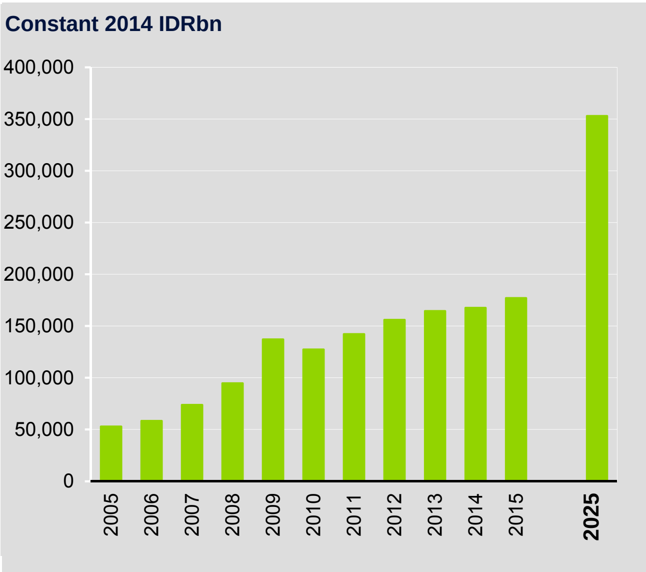


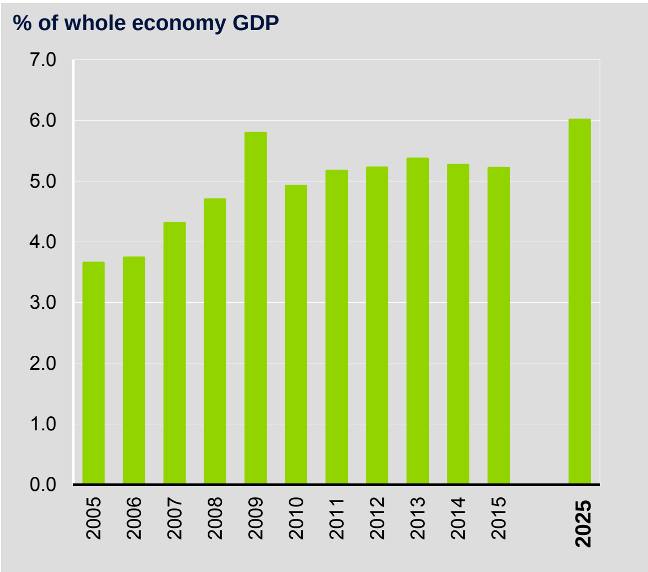
INVESTMENT

Travel & Tourism is expected to have attracted capital investment of IDR167,435.0bn in 2014. This is expected to rise by 5.7% in 2015, and rise by 7.1% pa over the next ten years to IDR352,910.0bn in 2025.

Travel & Tourism's share of total national investment will rise from 5.2% in 2015 to 6.0% in 2025.

INDONESIA: CAPITAL INVESTMENT IN TRAVEL & TOURISM





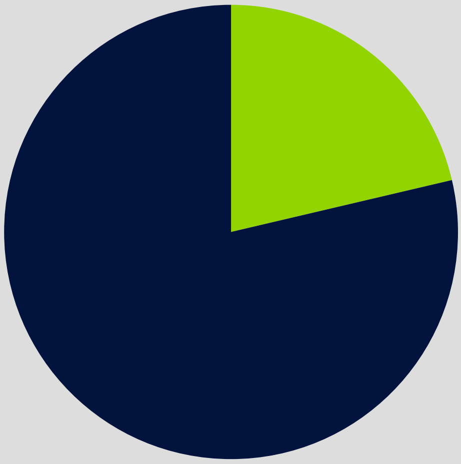
[1] All values are in constant 2014 prices & exchange rates

Different components of Travel & Tourism[1]

Indonesia
Travel & Tourism's Contribution to GDP: Business vs Leisure, 2014

Leisure spending
78.7%

Business spending
21.3%



Leisure travel spending (inbound and domestic) generated 78.7% of direct Travel & Tourism GDP in 2014 (IDR446,355.0bn) compared with 21.3% for business travel spending (IDR120,973.0bn).

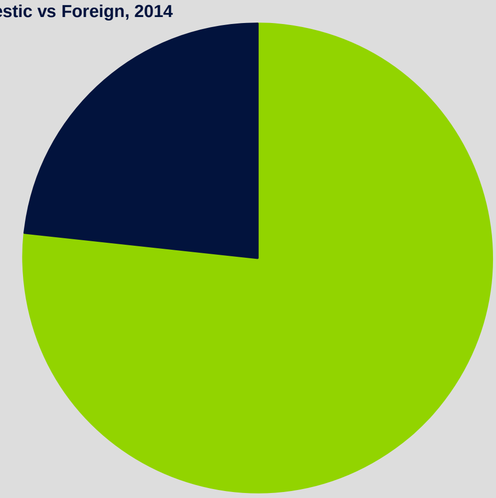
Leisure travel spending is expected to grow by 5.6% in 2015 to IDR471,435.0bn, and rise by 5.8% pa to IDR827,356.0bn in 2025.

Business travel spending is expected to grow by 8.1% in 2015 to IDR130,742.0bn, and rise by 3.6% pa to IDR186,553.0bn in 2025.

Indonesia
Travel & Tourism's Contribution to GDP: Domestic vs Foreign, 2014

Foreign visitor spending
23.3%

Domestic spending
76.7%



Domestic travel spending generated 76.7% of direct Travel & Tourism GDP in 2014 compared with 23.3% for visitor exports (ie foreign visitor spending or international tourism receipts).

Domestic travel spending is expected to grow by 6.4% in 2015 to IDR462,803.0bn, and rise by 5.3% pa to IDR775,303.0bn in 2025.

Visitor exports are expected to grow by 5.5% in 2015 to IDR139,373.0bn, and rise by 5.5% pa to IDR238,606.0bn in 2025.

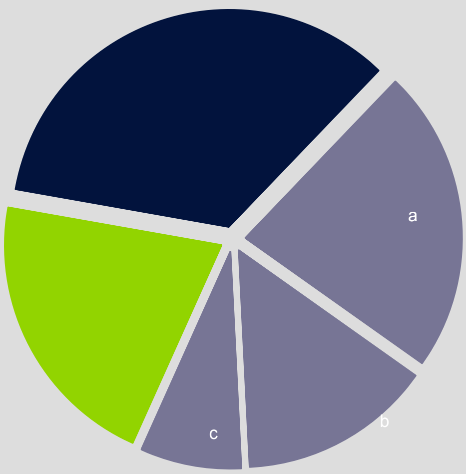
Indonesia
Breakdown of Travel & Tourism's Total Contribution to GDP, 2014

Direct
34.4%

Induced
21.1%

Indirect
44.5%

Indirect is the sum of:
(a) Supply chain
22.6%
(b) Investment
14.4%
(c) Government collective
7.5%



The Travel & Tourism industry contributes to GDP and employment in many ways as detailed on page 2.

The total contribution of Travel & Tourism to GDP is its direct contribution.

[1] All values are in constant 2014 prices & exchange rates

Country rankings:
Absolute contribution, 2014

Travel & Tourism's Direct Contribution to GDP		2014 (US$bn)
2	China	263.0
11	India	40.6
12	Australia	38.6
14	Thailand	31.9
17	**Indonesia**	27.5
	Asia Pacific Average	21.7
	World Average	19.4
23	Malaysia	18.6
36	Philippines	12.0
43	Vietnam	8.6
63	Sri Lanka	3.5
74	Cambodia	2.3

Travel & Tourism's Total Contribution to GDP		2014 (US$bn)
2	China	943.1
11	Australia	145.7
12	India	125.2
17	**Indonesia**	79.8
18	Thailand	72.2
	Asia Pacific Average	67.3
	World Average	58.3
26	Malaysia	49.2
36	Philippines	31.8
51	Vietnam	17.3
65	Sri Lanka	8.2
83	Cambodia	5.1

Travel & Tourism's Direct Contribution to Employment		2014 '000 jobs
1	China	23160.0
2	India	23024.1
5	**Indonesia**	3325.8
8	Thailand	2210.2
	Asia Pacific Average	2000.0
9	Vietnam	1963.5
13	Philippines	1259.8
17	Cambodia	985.4
	World Average	827.0
24	Malaysia	724.3
32	Australia	504.6
41	Sri Lanka	351.9

Travel & Tourism's Total Contribution to Employment		2014 '000 jobs
1	China	66086.2
2	India	36695.4
4	**Indonesia**	9813.9
7	Thailand	5382.9
	Asia Pacific Average	4673.9
10	Philippines	4231.9
12	Vietnam	4088.6
20	Cambodia	2221.5
	World Average	2076.6
24	Malaysia	1769.9
29	Australia	1415.8
42	Sri Lanka	819.6

Travel & Tourism Capital Investment		2014 (US$bn)
2	China	136.8
4	India	34.5
10	Australia	18.4
13	**Indonesia**	14.1
	Asia Pacific Average	9.5
20	Thailand	7.2
25	Malaysia	5.9
32	Vietnam	4.6
	World Average	4.5
53	Philippines	2.1
68	Sri Lanka	0.9
93	Cambodia	0.4

Visitor Exports		2014 (US$bn)
3	China	60.8
10	Thailand	40.3
14	Malaysia	22.6
18	India	20.1
21	Australia	18.8
	Asia Pacific Average	12.4
32	**Indonesia**	11.2
39	Vietnam	7.8
	World Average	7.5
49	Philippines	5.8
59	Sri Lanka	3.5
60	Cambodia	3.2

The tables on pages 7-10 provide provide brief extracts from the full WTTC Country League Table Rankings, highlighting comparisons with competing destinations as well as with the world and regional average. Averages in above tables are simple cross-country averages.
The competing destinations selected are those that offer a similar tourism product and compete for tourists from the same set of origin markets. These tend to be, but are not exclusively, geographical neighbours.

Country rankings: Relative contribution, 2014

Travel & Tourism's Direct Contribution to GDP		2014 % share
16	Cambodia	13.5
25	Thailand	8.6
48	Malaysia	5.7
61	Sri Lanka	4.8
64	Vietnam	4.6
70	Philippines	4.2
99	**Indonesia**	3.2
	World	3.1
	Asia Pacific	3.0
118	Australia	2.7
120	China	2.6
138	India	2.2

Travel & Tourism's Total Contribution to GDP		2014 % share
17	Cambodia	29.9
38	Thailand	19.3
50	Malaysia	14.9
69	Philippines	11.2
70	Sri Lanka	11.1
80	Australia	10.1
	World	9.8
93	China	9.4
94	**Indonesia**	9.3
95	Vietnam	9.3
	Asia Pacific	9.2
130	India	6.7

Travel & Tourism's Direct Contribution to Employment		2014 % share
18	Cambodia	11.7
46	Thailand	5.8
49	India	5.5
52	Malaysia	5.3
71	Australia	4.4
72	Sri Lanka	4.3
82	Vietnam	3.7
	Asia Pacific	3.7
	World	3.6
97	Philippines	3.3
109	China	3.0
114	**Indonesia**	2.9

Travel & Tourism's Total Contribution to Employment		2014 % share
21	Cambodia	26.4
51	Thailand	14.1
56	Malaysia	13.0
61	Australia	12.2
72	Philippines	11.1
80	Sri Lanka	10.0
	World	9.4
97	India	8.7
99	China	8.6
	Asia Pacific	8.5
104	**Indonesia**	8.4
116	Vietnam	7.7

Travel & Tourism Investment Contribution to Total Capital Investment		2014 % share
27	Cambodia	15.6
45	Vietnam	10.0
63	Thailand	7.4
73	Malaysia	6.8
82	India	6.2
88	**Indonesia**	5.3
94	Australia	4.7
	World	4.3
111	Sri Lanka	4.1
	Asia Pacific	3.7
130	Philippines	3.6
146	China	2.9

Visitor Exports Contribution to Total Exports		2014 % share
36	Cambodia	32.7
52	Sri Lanka	21.3
72	Thailand	14.4
88	Malaysia	8.6
104	Philippines	6.9
108	Australia	6.4
	World	5.7
117	**Indonesia**	5.6
	Asia Pacific	5.2
125	Vietnam	4.8
133	India	4.1
159	China	2.4

Country rankings:
Real growth, 2015

Travel & Tourism's Direct Contribution to GDP		2015 % growth
3	Cambodia	8.4
6	Vietnam	7.9
7	India	7.6
16	China	6.7
26	**Indonesia**	6.0
37	Malaysia	5.6
	Asia Pacific	5.1
54	Philippines	5.0
74	Australia	3.9
	World	3.7
92	Thailand	3.4
156	Sri Lanka	1.3

Travel & Tourism's Total Contribution to GDP		2015 % growth
2	Cambodia	8.2
4	Vietnam	8.0
9	India	7.5
10	China	7.5
12	**Indonesia**	7.0
	Asia Pacific	5.5
39	Malaysia	5.3
47	Philippines	5.0
	World	3.7
86	Australia	3.5
96	Thailand	3.2
125	Sri Lanka	2.5

Travel & Tourism's Direct Contribution to Employment		2015 % growth
9	Cambodia	6.0
52	Vietnam	3.6
56	Malaysia	3.5
76	Philippines	2.6
83	**Indonesia**	2.3
	World	2.0
103	India	1.9
	Asia Pacific	1.8
122	China	1.2
147	Thailand	0.2
169	Australia	-1.8
171	Sri Lanka	-2.6

Travel & Tourism's Total Contribution to Employment		2015 % growth
22	Cambodia	4.5
44	Vietnam	3.6
50	**Indonesia**	3.3
51	China	3.3
54	Malaysia	3.1
	Asia Pacific	2.8
	World	2.6
69	Philippines	2.5
98	India	1.8
126	Thailand	1.0
165	Australia	-0.9
172	Sri Lanka	-2.4

Travel & Tourism Investment		2015 % growth
22	India	9.3
26	Sri Lanka	8.3
32	China	7.8
41	Vietnam	7.1
	Asia Pacific	6.3
64	**Indonesia**	5.7
65	Cambodia	5.6
73	Thailand	5.4
76	Malaysia	5.3
	World	4.8
121	Philippines	3.2
168	Australia	0.4

Visitor Exports		2015 % growth
11	Cambodia	8.3
22	Vietnam	7.4
40	Malaysia	5.8
47	**Indonesia**	5.5
56	India	5.2
76	Australia	4.1
91	Thailand	3.3
	Asia Pacific	3.0
	World	2.8
121	China	2.2
150	Philippines	-0.3
159	Sri Lanka	-1.6

WORLD TRAVEL & TOURISM COUNCIL

Country rankings: Long term growth, 2015 - 2025

Travel & Tourism's Direct Contribution to GDP		2015 - 2025 % growth pa
5	India	7.2
7	Thailand	6.7
11	Vietnam	6.6
15	Cambodia	6.3
23	Sri Lanka	6.1
24	China	6.0
34	Philippines	5.6
43	**Indonesia**	5.3
	Asia Pacific	4.9
101	Malaysia	4.1
	World	3.9
138	Australia	3.2

Travel & Tourism's Total Contribution to GDP		2015 - 2025 % growth pa
4	India	7.3
13	Cambodia	6.5
15	Thailand	6.4
18	China	6.2
19	Vietnam	6.2
21	Sri Lanka	6.1
27	**Indonesia**	5.9
31	Philippines	5.7
	Asia Pacific	5.0
73	Malaysia	4.5
	World	3.8
149	Australia	2.9

Travel & Tourism's Direct Contribution to Employment		2015 - 2025 % growth pa
7	Cambodia	4.6
8	Thailand	4.6
52	Malaysia	2.9
64	Philippines	2.6
69	Sri Lanka	2.5
89	India	2.2
	World	2.0
	Asia Pacific	2.0
112	Vietnam	1.8
131	**Indonesia**	1.4
135	China	1.3
145	Australia	1.0

Travel & Tourism's Total Contribution to Employment		2015 - 2025 % growth pa
10	Thailand	4.1
33	China	3.3
34	Cambodia	3.3
36	Malaysia	3.2
	Asia Pacific	2.6
57	Philippines	2.6
	World	2.3
87	India	2.0
105	**Indonesia**	1.8
113	Sri Lanka	1.7
125	Australia	1.4
131	Vietnam	1.3

Travel & Tourism Investment Contribution to Capital Investment		2015 - 2025 % growth pa
11	**Indonesia**	7.1
14	China	6.6
16	India	6.5
19	Cambodia	6.4
21	Malaysia	6.3
26	Vietnam	6.2
32	Thailand	6.0
	Asia Pacific	5.7
48	Sri Lanka	5.5
73	Philippines	4.8
	World	4.6
170	Australia	2.0

Visitor Exports Contribution to Exports		2015 - 2025 % growth pa
4	Thailand	7.7
11	Vietnam	6.8
17	Philippines	6.6
21	Sri Lanka	6.3
22	India	6.3
27	Cambodia	6.0
39	China	5.5
40	**Indonesia**	5.5
	Asia Pacific	4.7
	World	4.2
123	Malaysia	3.5
163	Australia	2.4

Summary tables: Estimates & Forecasts

Indonesia	2014 US$mn[1]	2014 % of total	2015 Growth[2]	2025 US$mn[1]	2025 % of total	2025 Growth[3]
Direct contribution to GDP	27,464.9	3.2	6.0	49,036.1	3.2	5.3
Total contribution to GDP	79,836.8	9.3	7.0	151,189.0	9.9	5.9
Direct contribution to employment[4]	3,325.8	2.9	2.3	3,905.5	2.9	1.4
Total contribution to employment[4]	9,813.9	8.4	3.3	12,127.3	8.9	1.8
Visitor exports	11,152.4	5.6	5.5	20,135.0	6.2	5.5
Domestic spending	36,722.3	4.3	6.4	65,425.0	4.3	5.3
Leisure spending	37,666.2	2.5	5.6	69,817.5	2.5	5.8
Business spending	10,208.5	0.7	8.1	15,742.5	0.6	3.6
Capital investment	14,129.2	5.3	5.7	29,780.7	6.0	7.1

[1]2014 constant prices & exchange rates; [2]2015 real growth adjusted for inflation (%); [3]2015-2025 annualised real growth adjusted for inflation (%); [4]'000 jobs

Asia Pacific	2014 US$bn[1]	2014 % of total	2015 Growth[2]	2025 US$bn[1]	2025 % of total	2025 Growth[3]
Direct contribution to GDP	694.1	3.0	5.1	1,177.1	3.2	4.9
Total contribution to GDP	2,153.9	9.2	5.5	3,709.7	10.1	5.0
Direct contribution to employment[4]	64,001	3.7	1.8	79,075	4.0	2.0
Total contribution to employment[4]	149,566	8.5	2.8	199,583	10.2	2.6
Visitor exports	397.8	5.2	3.0	646.9	5.2	4.7
Domestic spending	1,162.7	5.0	5.8	2,000.1	5.5	5.0
Leisure spending	1,206.4	2.2	4.7	2,087.6	2.5	5.2
Business spending	354.2	0.7	6.6	559.5	0.7	4.0
Capital investment	303.5	3.7	6.3	560.2	4.7	5.7

[1]2014 constant prices & exchange rates; [2]2015 real growth adjusted for inflation (%); [3]2015-2025 annualised real growth adjusted for inflation (%); [4]'000 jobs

Worldwide	2014 US$bn[1]	2014 % of total	2015 Growth[2]	2025 US$bn[1]	2025 % of total	2025 Growth[3]
Direct contribution to GDP	2,364.8	3.1	3.7	3,593.2	3.3	3.9
Total contribution to GDP	7,580.9	9.8	3.7	11,381.9	10.5	3.8
Direct contribution to employment[4]	105,408	3.6	2.0	130,694	3.9	2.0
Total contribution to employment[4]	276,845	9.4	2.6	356,911	10.7	2.3
Visitor exports	1,383.8	5.7	2.8	2,140.1	5.6	4.2
Domestic spending	3,642.1	4.7	3.7	5,465.0	5.0	3.8
Leisure spending	3,850.2	2.3	3.3	5,928.8	2.5	4.1
Business spending	1,175.7	0.7	4.0	1,679.0	0.7	3.2
Capital investment	814.4	4.3	4.8	1,336.4	4.9	4.6

[1]2014 constant prices & exchange rates; [2]2015 real growth adjusted for inflation (%); [3]2015-2025 annualised real growth adjusted for inflation (%); [4]'000 jobs

% of total refers to each indicator's share of the relevant whole economy indicator such as GDP and employment. Visitor exports is shown relative to total exports of goods and Domestic spending is expressed relative to whole economy GDP. For leisure and business spending, their direct contribution to Travel & Tourism GDP is calculated as a share of whole economy GDP (the sum of these shares equals the direct contribution). Investment is relative to whole economy investment.

The economic contribution of Travel & Tourism: Real 2014 prices

Indonesia (IDRbn, real 2014 prices)	2009	2010	2011	2012	2013	2014	2015E	2025F
1. Visitor exports	84,766	86,415	91,622	98,194	113,937	132,159	139,373	238,606
2. Domestic expenditure (includes government individual spending)	348,344	346,908	354,179	378,306	408,194	435,169	462,803	775,303
3. Internal tourism consumption (= 1 + 2)	433,110	433,323	445,801	476,500	522,131	567,328	602,176	1,013,909
4. Purchases by tourism providers, including imported goods (supply chain)	-180,577	-181,525	-188,201	-201,649	-222,272	-241,861	-257,074	-432,818
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	252,533	251,798	257,600	274,851	299,859	325,467	345,102	581,091
Other final impacts (indirect & induced)								
6. Domestic supply chain	169,911	169,420	173,323	184,930	201,757	218,987	232,198	390,981
7. Capital investment	137,056	127,335	142,063	155,896	164,396	167,435	176,940	352,910
8. Government collective spending	57,545	58,279	61,643	64,972	70,563	72,846	78,733	154,840
9. Imported goods from indirect spending	-21,936	-24,012	-29,125	-33,540	-35,913	-37,852	-37,405	-71,835
10. Induced	162,743	159,628	163,337	171,873	186,116	199,204	217,202	383,633
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	757,852	742,448	768,841	818,982	886,778	946,087	1,012,770	1,791,620
Employment impacts ('000)								
12. Direct contribution of Travel & Tourism to employment	3,013.0	2,921.5	2,844.1	2,970.7	3,164.5	3,325.8	3,403.9	3,905.5
13. Total contribution of Travel & Tourism to employment	9,266.0	8,828.7	8,707.4	9,038.4	9,502.0	9,813.9	10,141	12,127
Other indicators								
14. Expenditure on outbound travel	80,133	81,659	75,317	80,606	98,654	106,796	113,346	375,792

The economic contribution of Travel & Tourism: Nominal prices

Indonesia **(IDRbn, nominal prices)**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015E**	**2025F**
1. Visitor exports	62,514	68,988	79,056	88,464	107,081	132,158	148,977	390,824
2. Domestic expenditure (includes government individual spending)	256,902	276,947	305,603	340,820	383,633	435,168	494,692	1,269,910
3. Internal tourism consumption (= 1 + 2)	319,416	345,935	384,659	429,284	490,714	567,326	643,669	1,660,734
4. Purchases by tourism providers, including imported goods (supply chain)	-133,175	-144,917	-162,389	-181,668	-208,898	-241,860	-274,788	-708,936
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	186,241	201,018	222,270	247,616	281,816	325,466	368,881	951,798
Other final impacts (indirect & induced) 6. Domestic supply chain	125,308	135,253	149,552	166,606	189,617	218,986	248,198	640,407
7. Capital investment	101,077	101,655	122,579	140,449	154,504	167,435	189,133	578,049
8. Government collective spending	42,439	46,526	53,188	58,534	66,317	72,846	84,158	253,620
9. Imported goods from indirect spending	-16,176	-19,169	-25,130	-30,218	-33,752	-37,852	-39,986	-117,656
10. Induced	120,022	127,436	140,935	154,842	174,917	199,204	232,168	628,372
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	558,911	592,720	663,394	737,829	833,420	946,085	1,082,550	2,934,590
Employment impacts ('000) 12. Direct contribution of Travel & Tourism to employment	3,013.0	2,921.5	2,844.1	2,970.7	3,164.5	3,325.8	3,403.9	3,905.5
13. Total contribution of Travel & Tourism to employment	9,266.0	8,828.7	8,707.4	9,038.4	9,502.0	9,813.9	10,141	12,127
Other indicators **14.** Expenditure on outbound travel	59,097	65,191	64,987	72,619	92,718	106,796	121,156	615,530

*Concepts shown in this table align with the standard table totals as described in the *2008 Tourism Satellite Account: Recommended Methodological Framework* (TSA: RMF 2008) developed by the United Nations Statistical Division (UNSD), the Statistical Office of the European Communities (EUROSTAT), the Organisation for Economic Co-operation and Development (OECD) and the World Tourism Organization (UNWTO).

Historical data for concepts has been benchmarked to match reported TSA data where available.

The economic contribution of Travel & Tourism: Growth

Indonesia Growth[1] (%)	2009	2010	2011	2012	2013	2014	2015E	2025F [2]
1. Visitor exports	-26.3	1.9	6.0	7.2	16.0	16.0	5.5	5.5
2. Domestic expenditure (includes government individual spending)	-2.4	-0.4	2.1	6.8	7.9	6.6	6.4	5.3
3. Internal tourism consumption (= 1 + 2)	-8.0	0.1	2.9	6.9	9.6	8.6	6.2	5.4
4. Purchases by tourism providers, including imported goods (supply chain)	-9.4	0.5	3.7	7.1	10.2	8.8	6.3	5.3
5. Direct contribution of Travel & Tourism to GDP (= 3 + 4)	-7.3	-0.3	2.3	6.7	9.1	8.5	6.0	5.3
Other final impacts (indirect & induced) 6. Domestic supply chain	-7.3	-0.3	2.3	6.7	9.1	8.5	6.0	5.3
7. Capital investment	44.8	-7.1	11.6	9.7	5.5	1.8	5.7	7.1
8. Government collective spending	19.5	1.3	5.8	5.4	8.6	3.2	8.1	7.0
9. Imported goods from indirect spending	-4.0	1.1	5.3	7.5	8.7	6.9	5.5	5.9
10. Induced	10.7	-1.9	2.3	5.2	8.3	7.0	9.0	5.9
11. Total contribution of Travel & Tourism to GDP (= 5 + 6 + 7 + 8 + 9 + 10)	5.5	-2.0	3.6	6.5	8.3	6.7	7.0	5.9
Employment impacts ('000) 12. Direct contribution of Travel & Tourism to employment	-9.4	-3.0	-2.7	4.5	6.5	5.1	2.3	1.4
13. Total contribution of Travel & Tourism to employment	3.1	-4.7	-1.4	3.8	5.1	3.3	3.3	1.8
Other indicators **14.** Expenditure on outbound travel	-25.0	1.9	-7.8	7.0	22.4	8.3	6.1	12.7

[1] 2009-2014 real annual growth adjusted for inflation (%); [2] 2015-2025 annualised real growth adjusted for inflation (%)

Glossary

KEY DEFINITIONS

Travel & Tourism – relates to the activity of travellers on trips outside their usual environment with a duration of less than one year. Economic activity related to all aspects of such trips is measured within the research.

Direct contribution to GDP – GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists. It is equivalent to total internal Travel & Tourism spending (see below) within a country less the purchases made by those industries (including imports). In terms of the UN's Tourism Satellite Account methodology it is consistent with total GDP calculated in table 6 of the TSA: RMF 2008.

Direct contribution to employment – the number of direct jobs within Travel & Tourism. This is consistent with total employment calculated in table 7 of the TSA: RMF 2008.

Total contribution to GDP – GDP generated directly by the Travel & Tourism sector plus its indirect and induced impacts (see below).

Total contribution to employment – the number of jobs generated directly in the Travel & Tourism sector plus the indirect and induced contributions (see below).

DIRECT SPENDING IMPACTS

Visitor exports – spending within the country by international tourists for both business and leisure trips, including spending on transport, but excluding international spending on education. This is consistent with total inbound tourism expenditure in table 1 of the TSA: RMF 2008.

Domestic Travel & Tourism spending – spending within a country by that country's residents for both business and leisure trips. Multi-use consumer durables are not included since they are not purchased solely for tourism purposes. This is consistent with total domestic tourism expenditure in table 2 of the TSA: RMF 2008. Outbound spending by residents abroad is not included here, but is separately identified according to the TSA: RMF 2008 (see below).

Government individual spending – spending by government on Travel & Tourism services directly linked to visitors, such as cultural services (eg museums) or recreational services (eg national parks).

Internal tourism consumption – total revenue generated within a country by industries that deal directly with tourists including visitor exports, domestic spending and government individual spending. This does not include spending abroad by residents. This is consistent with total internal tourism expenditure in table 4 of the TSA: RMF 2008.

Business Travel & Tourism spending – spending on business travel within a country by residents and international visitors.

Leisure Travel & Tourism spending – spending on leisure travel within a country by residents and international visitors.

INDIRECT AND INDUCED IMPACTS

Indirect contribution – the contribution to GDP and jobs of the following three factors:

- **Capital investment** – includes capital investment spending by all industries directly involved in Travel & Tourism. This also constitutes investment spending by other industries on specific tourism assets such as new visitor accommodation and passenger transport equipment, as well as restaurants and leisure facilities for specific tourism use. This is consistent with total tourism gross fixed capital formation in table 8 of the TSA: RMF 2008.

- **Government collective spending** –government spending in support of general tourism activity. This can include national as well as regional and local government spending. For example, it includes tourism promotion, visitor information services, administrative services and other public services. This is consistent with total collective tourism consumption in table 9 of TSA: RMF 2008.

- **Supply-chain effects** – purchases of domestic goods and services directly by different industries within Travel & Tourism as inputs to their final tourism output.

Induced contribution – the broader contribution to GDP and employment of spending by those who are directly or indirectly employed by Travel & Tourism.

OTHER INDICATORS

Outbound expenditure – spending outside the country by residents on all trips abroad. This is fully aligned with total outbound tourism expenditure in table 3 of the TSA: RMF 2008.

Foreign visitor arrivals – the number of arrivals of foreign visitors, including same-day and overnight visitors (tourists) to the country.

Methodological note

WTTC has an on-going commitment to align its economic impact research with the UN Statistics Division-approved 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF 2008). This involves benchmarking of country reports to official, published TSAs, including for countries which are reporting data for the first time, as well as existing countries reporting an additional year's data. New country TSAs incorporated this year include France, Germany, Japan, Malaysia, Mexico, Oman, Qatar and Saudi Arabia.

In addition to producing data on 184 countries, WTTC also produces reports on 24 other regions, sub-regions and economic and geographic groups. This year, there are 8 reports for special economic and geographic groups with Pacific Alliance being included for the first time. Please also note that from this year, the report for Sudan no longer includes data on South Sudan.

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G20

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OTHER OCEANIA

American Samoa, Cook Islands, French Polynesia, Guam, Marshall Islands, Micronesia (Federated States of), New Caledonia, Niue, Northern Mariana Islands, Palau, Samoa, Tuvalu.

PACIFIC ALLIANCE

Chile, Colombia, Mexico, Peru.

SADC (SOUTHERN AFRICAN DEVELOPMENT COMMUNITY)

Angola, Botswana, Democratic Republic of Congo (DRC), Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, Tanzania, Zambia, Zimbabwe.

*included in European Union

Economic impact reports: Regions, sub-regions and countries

WORLD		
REGION	SUB-REGION	COUNTRY
AFRICA	NORTH AFRICA	Algeria
		Egypt
		Libya
		Morocco
		Tunisia
	SUB-SAHARAN	Angola
		Benin
		Botswana
		Burkina Faso
		Burundi
		Cameroon
		Cape Verde
		Central African Republic
		Chad
		Comoros
		Democratic Republic of Congo
		Ethiopia
		Gabon
		Gambia
		Ghana
		Guinea
		Ivory Coast
		Kenya
		Lesotho
		Madagascar
		Malawi
		Mali
		Mauritius
		Mozambique
		Namibia
		Niger
		Nigeria
		Republic of Congo
		Reunion
		Rwanda
		Sao Tome & Principe
		Senegal
		Seychelles
		Sierra Leone
		South Africa
		Sudan
		Swaziland
		Tanzania
		Togo
		Uganda
		Zambia
		Zimbabwe
AMERICAS	CARIBBEAN	Anguilla
		Antigua & Barbuda
		Aruba
		Bahamas
		Barbados
		Bermuda
		Cayman Islands
		Cuba
		Former Netherlands Antilles
		Dominica
		Dominican Republic
		Grenada
		Guadeloupe
		Haiti
		Jamaica
		Martinique
		Puerto Rico
		St Kitts & Nevis
		St Lucia
		St Vincent & the Grenadines
		Trinidad & Tobago
		UK Virgin Islands
		US Virgin Islands
	LATIN AMERICA	Argentina
		Belize
		Bolivia
		Brazil
		Chile
		Colombia
		Costa Rica
		El Salvador
		Ecuador
		Guatemala
		Guyana
		Honduras
		Nicaragua
		Panama
		Paraguay
		Peru
		Suriname
		Uruguay
		Venezuela
	NORTH AMERICA	Canada
		Mexico
		USA
ASIA-PACIFIC	NORTHEAST ASIA	Japan
		China
		Hong Kong
		South Korea
		Macau
		Taiwan
		Mongolia
	OCEANIA	Australia
		New Zealand
		Fiji
		Kiribati
		Other Oceania
		Papua New Guinea
		Solomon Islands
		Tonga
		Vanuatu
	SOUTH ASIA	Bangladesh
		India
		Maldives
		Nepal
		Pakistan
		Sri Lanka
	SOUTHEAST ASIA	Brunei
		Cambodia
		Indonesia
		Laos
		Malaysia
		Myanmar
		Philippines
		Singapore
		Thailand
		Vietnam
EUROPE	EUROPEAN UNION	Austria
		Belgium
		Bulgaria
		Croatia
		Cyprus
		Czech Republic
		Denmark
		Estonia
		Finland
		France
		Germany
		Greece
		Hungary
		Ireland
		Italy
		Latvia
		Lithuania
		Luxembourg
		Malta
		Netherlands
		Poland
		Portugal
		Romania
		Slovakia
		Slovenia
		Spain
		Sweden
		UK
	OTHER EUROPE	Albania
		Armenia
		Azerbaijan
		Belarus
		Bosnia Herzegovina
		Georgia
		Iceland
		Kazakhstan
		Kyrgyzstan
		Macedonia
		Moldova
		Montenegro
		Norway
		Russian Federation
		Serbia
		Switzerland
		Turkey
		Ukraine
		Uzbekistan
MIDDLE EAST		Bahrain
		Iran
		Iraq
		Israel
		Jordan
		Kuwait
		Lebanon
		Oman
		Qatar
		Saudi Arabia
		Syria
		UAE
		Yemen

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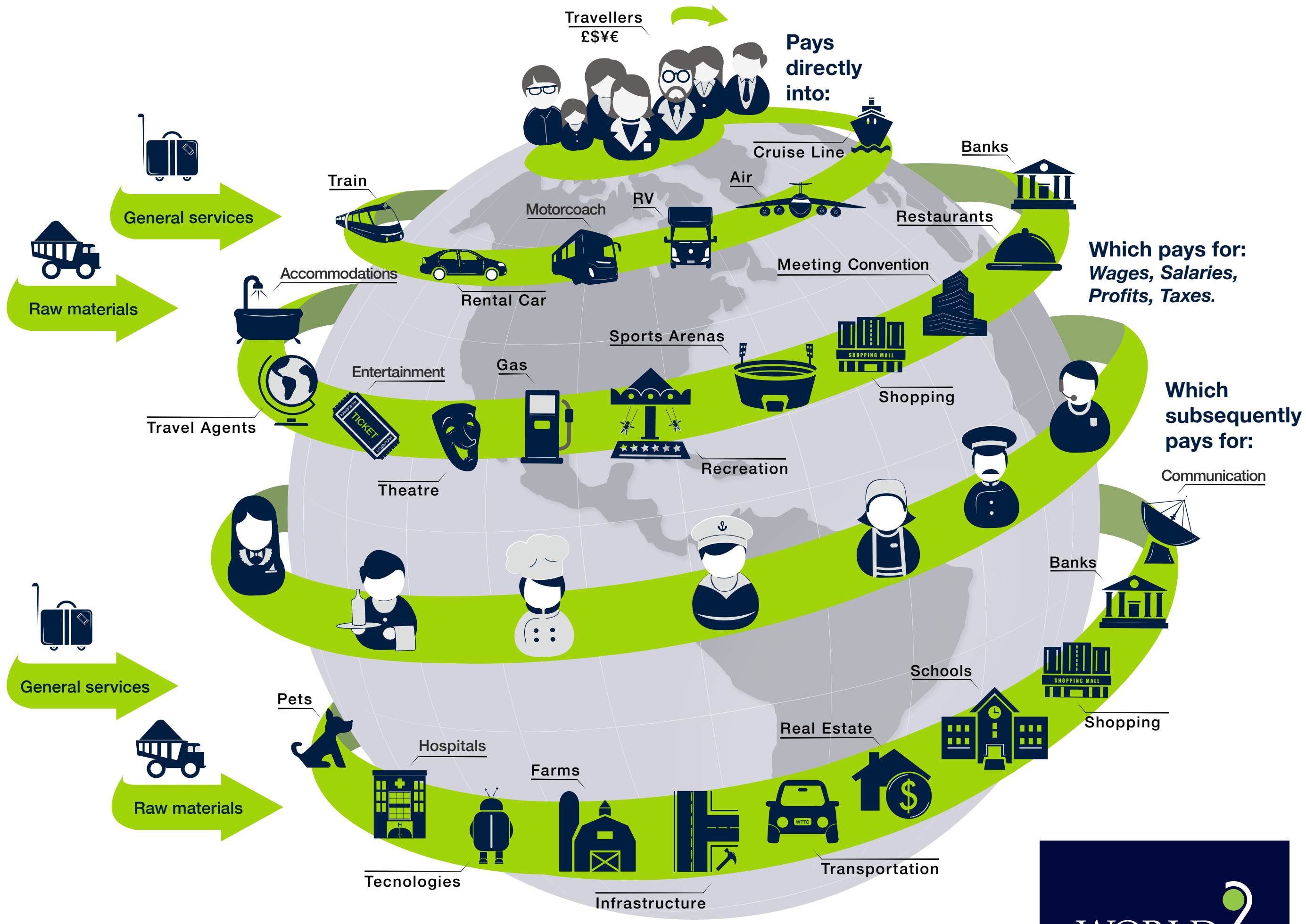
HOW MONEY TRAVELS



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