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# The Migration of Australians to Bali, Indonesia: More than Retirees and Surfers

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## Abstract

The factors underpinning the migration of Australian residents to Bali, Indonesia and the demographic characteristics of the Australian expatriate population in Bali are examined. It is argued that in undertaking a move to Bali, Australian expatriates are employing a deliberate strategy to utilise their existing financial resources and social networks to gain a lifestyle they perceive would not be available to them if they were to remain in Australia. However, it is also argued that there is considerable diversity in the factors underpinning migration decisions. Through a survey of 236 Australians living in Bali, it was found that a complex of place-based and non place-based factors influenced migration decisions. It was also found that some factors underpinning migration were broadly associated with phase in the life course. While the survey identified only a minor overrepresentation of Australian retirees living in Bali, given the factors that were identified as underpinning migration to Bali, and with the large baby boomer population nearing retirement, it is probable that as Australia's population ages there will be further growth in the number and proportional share of older Australian's living in Bali.

## 1. Introduction

The world's population is growing and ageing at an unprecedented rate (United Nations Department of Economic and Social Affairs Population Division 2013). While the causes of population growth and ageing are well understood, the potential social, economic, environmental and cultural implications are less well understood and, as such, continue to attract considerable scrutiny. With policy responses to population growth and ageing most often developed at a country or sub-country scale, understanding the spatial patterns and drivers of population change is critical for effective policy development (Davies & James 2011). However, projecting the spatial patterns of population growth and ageing at country or sub-country scale can be complicated by international migration patterns. Typically, while population projections permit minor variations of immigration and emigration rates over time and spatial units (ABS 2013; Productivity Commission 2013) they are not sensitive to the different net migration flows and rates associated with phase in the life course.

A contextually diverse and thematically broad body of literature provides robust evidence for the association between migration decisions and phase in the life course and moreover the implications of life course migration flows for the social, economic and environmental development of places. At a macro scale, a well-recognised example of a migration flow associated with phase in the life course has been the movement of retirees from the United Kingdom and Northern Europe to high amenity locations in Spain, France and Portugal (Gustafson 2008). The implications of this migration flow for the southern European destinations and sending countries has received considerable research attention, with scholars highlighting environmental, social and economic issues (Innes 2008; Zasada et al. 2010). Specific attention has also been given to considering the implications for health care and welfare (particularly aged pension) systems (Hardill et al. 2005; La Parra & Mateo 2008). The size of the UK and Northern European retiree population in high amenity areas of Spain, France and Portugal is anticipated to continue to grow over the next three decades as the number of older people in the UK and Northern Europe also increases. For countries like Australia, which is currently considered to have a relatively young but ageing population (Foot & Gomez 2007), and where 56% of the population growth for the next three decades is to result from net international migration (ABS 2013), it is particularly important to understand the drivers of immigration and emigration, the association of migration flows to phase in the life course and, in turn, how the ageing of the population might impact net migration rates.

Before population projections can be refined to account for shifts in immigration and emigration flows related to life course migration and overall population ageing, it is first necessary to identify existing migration flows and the drivers of these. This paper therefore investigates dimensions of a relatively new yet reportedly rapidly growing flow of Australians to Bali, Indonesia (Swallow 2014). Bali, which is a six hour flight from Sydney (New South

Wales) and a four hour flight from Perth (Western Australia) has attracted Australian holiday makers since the 1990s. However, over the past two decades an increasing number of Australians have moved to Bali, with estimates suggesting the Australian expat population has swelled to just over 10,000 persons (Hoath & Davies 2015). Australians now form the largest expatriate group in Bali. Within popular media, it has been reported that the migration of Australians to Bali fundamentally involves retirees who are driven by a desire to access lower living costs available in Bali (Allen 2010; Cassrels 2011, 2012; Hodal 2013). If this is the case, given Australia's projected growth of the population aged 65+ over the next three decades, we would expect a concurrent increase in the migration of Australians to Bali.

However, other than a handful of anecdotal accounts of individual migration decisions, little has been presented in the way of evidence explaining the dimensions or nature of the Australia to Bali migration flow. Crucially, due to the various types of visa arrangements expatriates adopt when living in Bali, there are no accurate data on the number or demographic characteristics of foreigners living in Bali. This study therefore examines the demographic characteristics of the Australian expatriate population in Bali and the reasons why this group elected to locate in Bali. Importantly, despite the long established tourism relationship between Bali and Australia, Bali is not considered an easy destination for Australians to migrate to, in that Australians face regulatory, cultural and language barriers. How Australians negotiate these barriers are also examined. The findings contribute to knowledge about international amenity and lifestyle migration and the relationship between migration decisions and phase in the life course.

This paper reports the results of a survey of Australians who considered their main residence to be in Bali, Indonesia. The survey collected data describing individuals' demographic characteristics, reasons for moving to Bali, reasons for remaining in Bali and their longer-term intentions regarding return migration to Australia. The analysis of the survey data was completed in reference to existing understandings of amenity and lifestyle migration.

The following section presents a review of the major tenets of scholarly work on amenity and lifestyle migration. The remainder of the paper then presents the results of the survey and provides comment on how these data might be understood in the context of existing scholarship on migration.

## **2. Amenity and Lifestyle Migration**

The literature on international migration is extensive, reporting on voluntary and involuntary migration, labour migration, circular and family migration, the drivers for migration and the implications of migration. Most relevant to this investigation are those studies concerned with lifestyle, amenity and retirement migration.

There are two dominant approaches to theorising migration related to place based amenity and lifestyle. The first of these associates migration with a phase in the life course (Benson 2010; McHugh et al. 1995). The life course approach to theorising migration contends that as people age and their activities and resources change, the factors underpinning their decisions to migrate (or not) also change. Broadly, in most advanced industrial societies, migrations associated with the life course are – in temporal order – a move away from the family home for work or education, a move into a larger home suitable for raising a family, and a move into a small home near or after retirement. Drawing on the life course framework, Bures (1997) compared the effects of demographic, economic and amenity factors on the migration decisions of populations at different ages: the young (25-44), the middle-aged (45-54), the pre-elderly (55-64), the young-old (65-74) and the old-old (75+). Using least square regression, Bures found distinct differences in the migration decisions of these five groups and associated these differences with their phase in the life course. While the published evidence associating migration with phase in the life course is compelling, many scholars do acknowledge that there are considerable variations within and across places.

The second dominant approach to theorising migration – the push and pull framework – considers migration to be the result of individuals' interpretation of contextual factors of their current location and desired future destination (Castles & Miller 2009; King et al. 1998;

Speare & Meyer 1988; Vizi 1993; Walters 2002). The body of work examining migration through the push and pull framework is contextually diverse, with contributions at varying geographic and temporal scales (Furnham 1986; Jacobs 2011; Mayda 2010; Mendoza & Moren-Alegret 2013; McHugh 2000; Woods 1984).

Within this body of work, studies examining amenity and lifestyle migration have drawn on and contributed to the theoretical progression of both the life course approach and push - pull framework (McHugh 2000). For example, much of the work on elderly and retirement migration considers how phase in the life course can influence individuals' understandings of and response to place based factors. As such, within the elderly migration literature there is broad agreement about the existence of three general types of elderly migration (Wiseman 1980; Wiseman & Roseman 1979). These are amenity migration, assistance migration and migration in response to severe disability and spouse absence (Walters 2000). Amenity migrants move primarily in search of leisure opportunities and, or alternatively, to attractive physical environments (Carlson et al. 1998; Haas & Serow 1993). Assistance migrants tend to be low-income, without a spouse in the household and tend to move to low-income housing or near to (or with) children or friends. Assistance migrants are motivated to move primarily due to economic need. The third group of migrants move in response to severe disability and spouse absence. These migrants tend to move to institutional care facilities or to the homes of family members. Their migration is motivated by their need for a high level of support for day-to-day activities. Amenity migrations are thought to constitute a large proportion of all domestic migrations by elderly people in advanced industrial countries and form the dominant category of international elderly migration.

Elderly migrants moving for 'amenity' or 'lifestyle' purposes are often also termed 'retiree migrants'. While it is acknowledged that elderly migrants may not actually be retired, it is largely agreed that their moves are more likely to correlate with lifestyle desires rather than labour market conditions. The (often deliberate) conflation of the terms elderly migration and retirement migration has resulted in the broad interpretation of elderly and retirement migrants to be those aged 65 year or older. This is due to the 'retirement age' historically being 65 years in the United Kingdom, the United State of America, Canada, Australia and numerous other advanced industrial countries. The relationship between amenity or lifestyle factors and elderly migration has been popularly acknowledged in broader society with North American elderly migrants often called 'snowbirds' in recognition of this group's preference for warmer climates. Similarly, in Australia and New Zealand, elderly migrants are often termed 'grey nomads', and in the UK the movement of more than 75,000 elderly migrants to the warmer climates of Spain has been termed the 'silver flight'.

Following on from the broad recognition of the importance of place based amenity and lifestyle factors to retirement migration, much of the work examining elderly migration has been concerned with identifying the factors influential to elderly migration that operate within the donor and destination communities (Williams et al. 1997). Rodriguez et al. (2004), for example, found that desirable climate and lifestyle options and lower costs of living were the main attractions while language differences and local dialects were the main barriers operating at the destination community. Longino et al. (2002) found that family and social networks within donor communities were the main pull factors operating against retirement migration, while high costs of living and undesirable climates were core push factors. Summarising the findings of published studies on elderly migration, specifically in relation to international migration, Casado-Diaz (2006, p. 1322) commented that older people have 'above average opportunities for international travel... are not restricted by employment obligations, and the majority have neither dependent children nor parents in need of daily personal care. These migrants are not motivated primarily by the quest for economic opportunities, but rather for leisure benefits and are oriented to improving their quality of life'.

Regardless of individuals' retirement status, there are apparent links between established tourism relationships and broadly defined 'amenity' migration trends. Researchers have identified that peoples' decisions to move, and selection of destination, are influenced by their previous experiences of a place as a tourist (Benson 2010; Casado-Diaz 2006; Gustafson 2001, 2002; King et al. 1998). However, research has also indicated that lifestyle and amenity migrants should not simply be considered 'long term' tourists (Banks 2004; Davies 2011).

Gustafson (2002, p. 899) found that amenity migrants distinguish themselves from tourists and 'attempted to create a social space for themselves between, on the one hand, tourist and tourism, and on the other hand the local population'. Specifically regarding retiree migrants, King et al. (1998) argued that they can be distinguished from tourists as they extend or generate new settlement patterns and patterns of social and economic activity. King et al. (1998, p. 93) commented, 'in southern Spain, as in Florida, older migrants, are, if anything, more venturesome than tourists or tourist developers in extending urban decentralisations, taking up properties in areas of rural depopulation, and settling formerly uninhabited coastlines'. Therefore, the treatment of amenity or lifestyle migrants as tourists (see for example, Hossain et al. 2003; Murphy et al. 2007; Stoeckl et al. 2006) could limit the development of understandings about the migration process, peoples' motivations for moving across the life course, and how migrants interact within the constantly reconfiguring destination.

Insight into the processes of and factors underpinning international amenity or lifestyle migration can also be gained from considering return migration. Research on return international migration associated with amenity or lifestyle drivers has largely focused on people who had moved (often internationally) for work and were now nearing, or of, retirement age. Studies examining return migration have reported on the social, political, family and economic factors influencing migrants' decisions to either move back to their 'home' country on retirement or remain in their 'host' community, simultaneously linking decisions to both phase in the life course and place based push and pull factors. Work by King (1986) on return migration found that the process challenged the popular assumption that migration from less developed regions (often rural) to more developed regions (often urban) was a permanent, one-way event.

Bolzman et al. (2006) presented particularly revealing information about the return migration process and highlighted the complex of place based and life course factors underpinning international migration decisions. Their study considered older Italian and Spanish migrants living in Switzerland who were nearing, or at the end of, their working lives. They found that many return elderly migrants preferred to move between Switzerland and their home country, maintaining residences in both countries. Other comparable studies have similarly identified a combination of demographic, economic, political and family factors influencing return migration (see Hunter 2011; King 1986; Kulu 1998; Lepore 1986; Lewis and Williams 1986; Lundholm 2010). These studies present a relatively complex picture of international return migration. They illustrate how the political arrangements in an individual's home country and host country and the individual's family and economic circumstances all influence migration decisions.

Over the last four decades, a considerable body of literature on amenity and lifestyle migration has been produced, much of which draws on a combination of both the life course and push and pull frameworks. From these studies, a complex set of social, economic, political, family, cultural and health factors have been identified as influencing international migration. Despite the achievements of this body of work, it must be noted that less attention has been given to such migration outside of the European and North American contexts. Within the south east Asian region scholarly concern has primarily focused on the socio-political, cultural and economic potentials and risks of intra and extra regional forced migration and labour migration, both informal and formal (Ananta & Arifin 2004; Hugo 2004). Hugo (2013) highlighted demographic differences between countries in the region as central to current migration trends, urging greater scholarly attention to the relationship between migration and economic and social development. Regarding amenity and lifestyle migration in the south east Asian region, although Fechter (2007, 2005) provided valuable insight into the experience of Euro-American expatriates working in Jakarta, there are few other studies available that provide insight into the migration of Australians to Bali.

### **3. Characteristics of Australians Living in Bali**

A survey of Australians who either lived in Bali or who were intending to move their primary residence to Bali was conducted between mid June and late July 2014. The survey was administered through an online survey platform (Qualtrics). As the target population did not

have a single identity or, more critically, point of contact, a number of strategies were used to disseminate the survey. These included:

- Indirect Email: Organisations that cater to expatriates in Bali were asked to email a link to the survey to their members. Organisations that did this were the Bali International Women's association, Bali Manual, Piston Broke Bali, Raffles Golf Club, Rotary Club in Bali, Royal Bali Yacht Club and the Indonesian Australia Business Council.
- Facebook: A link to the survey was placed on a number of active Facebook pages including Ubud Community, Expats Bali, FIFO Families, My FIFO family, FIFO Wife, Everything Bali, Mining Family Matters, Wife of a FIFO and the Rock Candy Mining Magazine Facebook page.
- News Media: An article was published in 'Perth Now', an online news site. The article included a link to the survey. Members of the research team were interviewed about the study on ABC 720 morning show, 6PR Drive program and Curtin FM radio shows where the address to the survey was provided. The link to the survey was also placed on the Facebook page for the ABC 720 morning show. Despite repeated attempts to achieve national media coverage, only Western Australian based media outlets reported on the survey.

Four hundred and thirty six people commenced the survey. The first two questions on the survey were designed to filter out participants who were not currently living in Bali or in the process of moving to Bali. Two hundred and thirty six people who participated in the survey responded positively to the first question which asked if they considered their main home to be in Bali. Those that answered no were directed to a follow up question asking them if they intended to move to Bali either within the next year, within the next five years or 'sometime in the future'. Twenty five per cent of respondents to this question intended on moving 'sometime in the future', of whom 44% were intending on moving within the next five years and 23% within the next year. This group of 'future' migrants has not been included in the analysis reported below. The current analysis focuses on the 236 people who indicated their main home to be in Bali. Not all questions on the survey were compulsory, so the response rate to questions varied (as indicated where relevant in the following discussion). Seventy five people (of the 236) did not answer all the questions they were eligible to answer. In particular, the final section of the survey, which asked basic demographic information of participants, had the lowest number of responses with only 161 participants completing this section. A sample of 161 participants, at a 95% confidence level for an assumed total population of 10000, results in a confidence interval of 0.07 and a standard error of 0.03.

Of the 161 participants who completed the survey fully, 72 were male and 89 were female. Participants' ages ranged from 19 to 71 years and the total sample had an average age of 44 (Table 1). Seventy three per cent of respondents were married or in a de facto relationship and just over one third had dependent children (Table 2). Seven per cent of respondents were single parents with dependent children. Fifty seven respondents had children living with them in Bali. Tables 2 and 3 show respectively the number of people by marital status with dependent children in Bali and the educational level of these children.

**Table 1 about here**

**Table 2 about here**

**Table 3 about here**

The majority of survey participants recorded their weekly income as being in excess of US\$ 1,000. Thirty three per cent of respondents received between US\$ 1,000 and 1,999 each week, while 19% received 2,000 or more per week. Only 19% received US\$ 399 or less each week. This compares to the monthly Provincial Minimum Wage (UMP) of Bali, which was Rp1,524,873 (approximately US\$117) in 2014.

The survey asked respondents to report the visa arrangements of all adult residents of their household. Indonesia offers six categories of visas. These are:

- Tourist visa – valid for 30 days (or 60 days if arranged in selected countries within the Asia region).
- Business visa – valid for 60 days (or 12 months for a multiple entry business visa)
- Employment visa
- Social-cultural visa – valid for 60 days or can possibly be extended to six months
- Family / dependent visa
- Retirement visa – valid for one year, and can be extended each year for up to five years (VisaBali 2015).

One hundred and sixty one individuals responded to this question, with data collected for 405 people (as there were multiple people living in most households). Eighteen per cent of the sample held tourist visas, 17% held employment visas, 12% held business visas, 11% held retirement visas, 13% held social-cultural visas and five per cent held family / dependent visas. Twenty four per cent reported not holding a visa. As no respondent reported having Indonesian citizenship (a specific question on this was asked) and only seven per cent reported having partners with Indonesian citizenship, it is likely that most of those who report not having a visa held a standard tourist visa (as entry to Bali is not permitted without a visa).

The survey also collected data on visa renewal methods used. Table 4 shows the methods used by Australian residents living in Bali to renew their visas based on their employment status. A Pearson's chi-square analysis of the relationship between visa type<sup>1</sup> and employment type<sup>2</sup> revealed a significant relationship between if and where a person was employed and the type of visa they held with a value of  $X^2 (30, N=405) = 243.858, p=.000$ . This relationship was influenced by the majority of those living in Bali but working outside of Bali holding tourist visas, while employment visas tended to be held by those working in Bali. For those who worked outside of Bali (such as in Australia) but lived in Bali, they had the opportunity to renew their 'tourist' visa on a regular basis each time they re-entered Bali.

A significant relationship was also found to exist between length of time lived in Bali and type of visa held, with  $X^2 (30, N=405) = 92.251, p=.000$  (Table 5). This relationship was influenced by the majority of those who had lived in Bali for less than one year and between one and three years using tourist visas. Employment visas were typically held by people who had lived in Bali for at least five years.

Table 6 shows the visa renewal methods used by Australians. Table 6 shows that those who lived in Bali for more than ten years preferred to use an agent in Bali to arrange the renewal of their Visa. Australians who had been based in Bali for less than five years were more likely to undertake a return trip to Australia or elsewhere in the Asia region to renew their visa than they were to use an agent in Bali.

**Table 4 about here**

**Table 5 about here**

**Table 6 about here**

Australians seeking to move to Bali must contend with property and business ownership regulations that are substantially different from those in Australia. Securing suitable housing is well recognised as an important factor influencing individuals' decisions to migrate, where to migrate to and return migration decisions (Davies & James 2011). In Bali, there are a number of legislative barriers to foreign ownership of land and this impacts expatriates' housing decisions. Right of building arrangements permit individuals to erect and occupy a building on land for a 30-50 year period (Jones Lang Lasalle 2014). These arrangements can be renewed once the time limit expires. However, only Indonesian citizens and companies established under Indonesian law can obtain a right of building (Jones Lang Lasalle 2014).

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<sup>1</sup> The categories used for visa type were: tourist visa, employment visa, business visa, retirement visa, social/cultural visa, family/dependent visa and I don't have a visa.

<sup>2</sup> The categories used for employment were 'FIFO worker', 'works for business located in Bali', 'works for business located in Australia', 'works for a business located in other country', 'retired' and 'not employed'.

Foreigners can invest in property through buying into a company which owns property. Resident foreigners can obtain a right of use (or lease) of a property for up to 25 years, with the possibility of a further 20 year or indefinite extension on the lease (Jones Lang Lasalle 2014).

The survey results indicate that many Australians in Bali rent their residence (48%) while 22% have a leasehold over their home. Only five per cent of respondents reported holding the power of attorney for a company that owned the property they lived in. Seven per cent reported that they had an Indonesian partner who owned the property they lived in. Two per cent of respondents reported that they had an interest in a foreign investment company which owned the title of the property they lived in. A further two per cent reported that their partner was Indonesian and that they lived on a property owned by their partner's family. Fourteen per cent indicated they had entered into another arrangement. The most frequently reported 'other arrangement' was (sub) leasing a room or home from another Australian.

Australians who move to Bali must also, to varying degrees, negotiate language barriers and learn cultural and legal arrangements. The survey asked participants about their language skills. The existing literature indicates that when considering a destination to move to, international migrants typically select localities where their 'native' language is the official or dominant spoken language, or there is a linguistic proximity (Adsera & Pytlikova 2012). Australian migration to Bali presents an interesting point of difference. Although many locals involved in the tourism sector have English skills, the official language, and increasingly the lingua franca of Bali, is Indonesian (*Bahasa Indonesia*). Despite the persistent concerns from some quarters of its subordination to the demands of tourism and the pan-national influence of Indonesian, Balinese nevertheless remains the everyday language for many Balinese people (see Couteau 2010). Yet the survey results revealed that only eight per cent of respondents could speak Balinese at a conversational level, while 59% of people spoke a few words and 32% never spoke the language. A much larger proportion had *Bahasa Indonesia* skills, with 41% speaking Indonesian conversationally and a further 16% speaking fluently. Nevertheless 34% spoke just 'a few words of Indonesian' and five per cent never spoke the language.

A frequency analysis of basic demographic characteristics of the sample group indicates that the population of Australians living in Bali is considerably more diverse than has been portrayed in the media. While it is true that older Australians are moving at the point of or after their retirement, many others are moving mid age to pursue careers in Bali and across the broader region. Furthermore, many individuals who move to Bali do so with school aged children. The following section discusses in greater detail the motivations for moving to Bali and the perceptions differently positioned respondents had of their current lifestyle in Bali.

#### **4. Why Australians Move to Bali**

As noted earlier, there is a mature body of literature examining and theorising why people make the decision to migrate (for further examples see Bushin 2009; De Jong & Gardner 1981; Halfacree 2004; Haug 2008; McHugh 1990; Kley 2011). The migration decision-making process has been linked to individual perceptions of opportunity differentials between the existing residence and potential destinations, the influence of existing social and family networks, their phase in the life course and access to economic and social resources (Kley 2011; Williams & Jobes 1990). Researchers have also investigated if the selection of a destination occurs before, after or simultaneously with the decision to migrate (Haas & Serow 1993; McHugh 1990). In cases where people are not primarily moving for work or family reasons, and are not considered to be forced migrants, researchers have identified that amenity factors of the destination are crucial in informing the decision to migrate (Davies & James 2011; McHugh 1984). However, Stockdale (2014) among others, cautions that notions of 'amenity' vary widely with individual circumstances and individual migration decisions based on negotiating complex of often competing concerns, constraints and priorities. Of particular interest to this study was the finding that those people who moved for various lifestyle reasons often selected destinations that they had prior knowledge of gained through previous leisure-oriented visits (such as holidays or travel to visit family members) (McHugh 1990; McHugh et al. 1995; Williams et al. 2000).

In line with these earlier studies on international migration, prior familiarity with Bali was an important influence on the migration decision-making processes. Bali has long been a popular holiday destination for Australians, with Australians making in excess of one million trips to Bali between July 2013 to June 2014 (ABS 2014). More than 25% of all international visitors to Bali are Australian (Nurhayati 2014). As Bali has grown in popularity as a holiday destination for Australians, it has also seen an increase in the number of Australians moving to Bali, with, as noted above, up to 10,000 Australians now living in Bali. The Department of Foreign Affairs and Trade (Australian Government) estimated that approximately 4,000 Australians live in Bali (Expat Web Site Association Jakarta Indonesia 2014). This is based on the number of Australians who officially hold visas to remain in Indonesia for more than a year.

Survey participants were asked how many times they had visited Bali before making the decision to move to Bali and for what reason. Options given included tourism purposes, visiting family members and visiting for work purposes. All survey participants reported they had visited Bali before moving to the Island. Table 7 shows that the majority of participants visited numerous times for tourism purposes, with 29% of participants visiting more than 15 times for a holiday before moving to Bali. However, there was no statistically significant relationship between the number of times individuals visited Bali and their responses to a question about the motivating factors for their move to Bali.

#### **Table 7 about here**

In addition, as represented in Table 8, participants identified the significance of a range of factors on their decision to migrate to Bali. The factors were developed from a review of the grey literature on migration to Bali and published literature on amenity and lifestyle migration (Allen 2010; Cassrels 2011, 2012; Hodal 2013). Table 8 lists the factors and the number of participants that responded in each category.

The survey revealed that the amenity factors of the natural and built environment were important in influencing the migration decision of the majority of those who move to Bali. Seventy one per cent of respondents identified that Bali's natural environment was important to their migration decision and 86 per cent indicated the importance of Bali's relaxed lifestyle. The lower comparative costs of living in Bali were also influential to the majority of people who moved to Bali with 68 per cent identifying as important the lower costs of living in Bali and 65 per cent the lower cost of housing. Critically, 70% of respondents identified Balinese culture as important in influencing their migration decision with 28% of respondents identifying this as extremely important. Therefore, it is apparent that people moved to Bali not simply to reduce their living costs, but for a combination of factors many of which are unique to Bali.

#### **Table 8 about here**

A Pearson's chi square analysis of the relationship between age category (as a proxy for phase in the life course) and the factors that influenced people to move to Bali revealed that there were no clear differences in the motivating factors for moving to Bali based on age (Table 9). However, a Pearson's chi square analysis of the relationship between visa type and 'availability of servants/ home help', with  $X^2 (24, N=161) = 53.2, p=.001$ , did reveal a possible difference between age groups, with people on retirement visas almost uniformly identifying this factor as very important in their decision to migrate to Bali. A significant relationship was also found between visa type and the importance of the resort lifestyle available in Bali, with  $X^2 (24, N=161) = 41.5, p=.005$ , again influenced by those with retirement visas most likely to select the 'resort lifestyle in Bali' as very important to their decision to migrate.

#### **Table 9 about here**

To assess how Australians living in Bali were negotiating and adapting to the social, economic, cultural, political and environmental conditions and constraints, survey participants were asked to register their level of agreement with a series of statements reflecting their

experience of living in Bali. The statements and participants' responses are presented in Table 10.

Almost all respondents reported that they were experiencing lower costs of living (92%) and had a better quality of life in Bali than they would have had in Australia (92%). Indeed with 92% preferring Bali's climate, 86% feeling accepted in the local community, 84% reporting their personal relationships had improved and 83% reporting living in Bali was better than they expected, most were happy with their decision to move to Bali. However, 17% identified that their lifestyle in Bali was not better than they had expected while 8% did not believe they had a better quality of life living in Bali and were not experiencing lower living costs. Thirty three per cent felt lonely or isolated living in Bali and 20% did not feel safe living in Bali.

Table 11 shows the results from Pearson's chi-square analysis of the relationships between various demographic and employment characteristics and how people felt about living in Bali. It reveals only a few significant differences in the responses between males and females, people of different phases in the life course (age) or people who had lived in Bali for different lengths of time. Pearson's chi-square analysis of individuals valuing of access to employment to how they felt about living in Bali resulted in  $X^2 (20, N=161) = 75.2, p=.001$  a relationship that was strongly influenced by people of working age selecting this as important whereas people of retirement age most often selected this variable as unimportant. Interestingly though there was no other statistically significant difference in peoples' responses based on their age category. Table 11 also shows that there were differences between male and female responses concerning the importance of the factors 'I participate in local Balinese festivals and events', 'I feel I am part of a strong expatriate community in Bali' and 'I feel accepted and welcome in my local Balinese community'. These relationships were influenced by females being more likely to indicate strong agreement to these factors, while males were more likely to agree. Women were more likely than men to participate more in Balinese festivals, feel part of an expat community, feel more strongly that they had been accepted into the local Balinese community and that life in Bali was better than they expected. However, women also reported feeling more isolated than men. People who were working in a country other than Bali (who were mostly male) reported feeling more isolated than those who worked in Bali. Retirees also were more likely to report feeling isolated. However, those who worked away were least likely to feel unsafe in Bali. These results could indicate that there is a difference between the experience of male and female expatriates living in Bali and that these differences could be associated with phase in the life course and employment arrangements.

**Table 10 about here**

**Table 11 about here**

## **5. Conclusion**

Within Australia, considerable media attention has been directed towards reporting the reasons for Australians living in Bali (for example Allen 2010; Barrymore 2010; Cassrels 2011, 2012, 2013; Hodal 2013; MacDonald 2010; O'Shea 2014; Traveller 2013; Wayne-Elliot 2010). Indeed, such has been the interest that a major free to air media station commissioned and broadcast a ten-part documentary series investigating why and how Australians were living in Bali. The series titled 'What Really Happens in Bali' was broadcast in 2014 during 'prime time'. Consistent across these media reports has been the notion that Australians primarily move to Bali because it offers lower living costs. However, as commented on at the outset of this paper, very little empirical evidence has been published that examines this issue. The results of this study confirmed that while the potential to reduce the cost of living was an important informing factor to decisions to migrate, there were a suite of other influential variables. Furthermore, the results of this study revealed that there was no uniform 'set' of factors influencing migration decisions.

While media reports of the migration of Australians to Bali have focused on 'retirees', the survey results revealed that Australians of differing age and employment arrangements moved to Bali. The survey data was analysed to observe if individuals' migration decisions

were influenced by their phase in the life course. For the purpose of this analysis, we used age category, employment status (retired or employed) and the presence of dependent children in the home as indicators of phase in the life course. The results revealed that phase in the life course did not fully explain why people had moved from Australia to Bali, with people in different phases of the life course agreeing on the importance of variables such as lower costs of living, natural amenity and the nature of and access to Balinese culture. Phase in the life course was also not reliable for explaining variability in the approaches Australians used to secure an Indonesian visa or housing. Phase in the life course was not influential in how people responded to the series of questions about how they felt about living in Bali.

The survey did reveal that, irrespective of position in the life course, prior visitation experiences were important in informing the migration decision. However, there was no statistically significant relationship between how many times an individual visited Bali and how they then rated the importance of the various motivating factors for moving. This was also true for the relationship between the reasons why people visited Bali (holiday, work or to visit family) and how they then rated the importance of the various motivating factors for moving.

The examination of the factors that influenced respondents' decisions to move to Bali revealed the significance of the geographical and cultural characteristics of Bali. People were not simply moving to a location with lower living costs. Rather, the combination of natural amenity, climate, lifestyle and the ability to integrate into a Balinese 'way of life' were important factors in peoples' decisions to move and sense of happiness in Bali. These findings highlight the importance of place-based factors in influencing the migration flow from Australia to Bali.

Australians are moving to Bali for more than just the lower living costs. The Australian expatriate population is more diverse than just older retired Australians. Young people are not simply in Bali to surf and dive. Indeed, many are working in businesses in Bali and feel they are integrating into the Balinese community. The reasons why Australians move to Bali are associated with how each migrant interprets social, economic, cultural and environmental push and pull factors operating in Australia and Bali and observed variability across the population can only be partially explained by phase in the life course.

Should the factors that are attracting Australian's to Bali (natural amenity, Balinese culture, and cost of living) not change dramatically over the next decade, it is likely that the number of Australians moving Bali to will continue to grow. However, such growth can itself undermine the values that drive migration. While the survey identified only a minor overrepresentation of retirees in the Australian expatriate population, it is feasible that as the proportional share of retirees in the Australian population grows there will be concurrent growth in the proportion of Australian retiree expatriate based in Bali. Such a scenario is reliant on favourable diplomatic relations and policy settings within both countries, as witnessed by recent debates concerning the tightening Australian age pension portability, and the absence of Australia from the list of recently revised list of countries eligible for free 30 day visa entry to Indonesia. The implications for both Bali and Australia of a growing, and potentially, growing older Australian expatriate population are complex and need further investigation.

The necessary limitations of the methodology of this study mean that although important information about the movement of Australians to Bali has been gained, there remain numerous gaps in our knowledge about the migration decision making process, the lived experiences of Australians in Bali, and the future intentions of the migrant population. A qualitative methodology incorporating interviews with Australians who are preparing to move to Bali, those living in Bali and those who have returned from Bali would provide additional valuable insight.

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**Table 1: Total sample age and gender (n=161)**

Total number of persons and proportion of the total population in each category											
	10-44		45-54		55-64		65-74		75+		Total
	Number of people	%	Number of people	%							
Male	20	12	19	12	21	13	12	7	0	0	72
Female	30	19	30	19	24	15	5	3	0	0	89
Total	50	31	49	31	45	28	17	10	0	0	161

**Table 2: The number of dependent children currently living in the respondent's home in Bali by respondent's marital status (n=101)**

Marital Status	Proportion of respondents in each category (%)					
	0 Children	1 Child	2 Children	3 Children	4 Children	5+ Children
Single	6	5	1	0	1	0
Married	36	17	15	5	0	1
'Life Partner'	3	6	2	2	1	0
Total	45	28	18	7	2	1

**Table 3: The number of dependent children currently living in the respondent's home in Bali in each educational category (n=101)**

		Number of children per household					
		1	2	3	4	5	Total
Educational Category	Less than three years of age	12	2	0	0	0	16
	Pre-school	12	0	0	0	1	17
	Kindergarten	11	0	0	0	0	11
	Local Primary	8	3	0	0	0	14
	Local Secondary	16	3	3	0	0	31
	Local Tertiary	2	0	2	0	0	8
	International Primary	9	3	0	0	0	15
	International Secondary	1	0	1	0	0	4
International Tertiary	10	1	1	0	0	15	

**Table 4: Visa renewal method of Australians living in Bali by type of employment (n=216).**

	Return trip to Perth		Return trip to Darwin		Return trip to other Australian city		Return trip to Singapore		Return trip to Kuala Lumpur		Used an agent in Bali		Other	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%
I am employed as a FIFO worker	8	4	0	0	0	0	0	0	0	0	3	1	1	0
I work and my main income comes from a business located in Bali	4	2	1	0	1	0	22	10	1	0	23	11	9	4
I work and my main income comes from a business located in Australia	12	5	0	0	9	4	6	3	1	0	6	3	7	3
I work and my main income comes from a business not located in either Australia or Bali	2	1	0	0	0	0	9	4	0	0	5	2	8	4
I am retired	7	3	2	1	1	0	8	4	0	0	19	9	8	4
I am not employed in paid work	4	4	0	0	2	1	10	5	2	1	9	4	6	3

Note: N indicates total number of persons and % indicates percentage of total respondents.

**Table 5: Type of visa held by length of time Australian's identified they had lived in Bali (n=121).**

Visa Type	Time Lived in Bali						Total
	Less than 1 year	2-3 years	3-5 years	5-10 years	10+ years	All my life	
Tourist Visa	9	10	2	1	2	0	24
Employment Visa	1	4	6	8	7	0	26
Business Visa	2	4	4	3	3	0	16
Retirement Visa	3	5	3	3	4	0	18
Social/Cultural Visa	9	6	6	5	1	0	27
Family/dependent Visa	3	0	3	1	1	0	8
I don't have a visa	0	1	0	0	0	1	2
Total	27	30	24	21	18	1	121

**Table 6: Visa renewal method of Australians living in Bali by length of time lived in Bali (n=185).**

Visa Renewal Method	Number of people						Total
	Less than 1 year	1-3 years	3-5 years	5-10 years	10+ years	All my life	
Return trip to Perth	4	9	5	3	1	1	23
Return trip to Darwin	1	1	0	0	0	0	2
Return trip to other Australian city	3	3	1	3	0	0	10
Return trip to Singapore	15	9	10	11	14	0	59
Return trip to Kuala Lumpur	2	2	2	0	0	0	6
Used an agent in Bali	10	12	11	8	18	0	59
Other (please specify)	5	3	7	2	8	1	26
Total	40	39	36	27	41	2	185

**Table 7: Visitation to Bali Prior to Moving to Bali (n=178)**

Type of Visit	Frequency of visitation to Bali expressed as a percentage of the sample for each visitation type.					
	0	1-2	2-5	5-10	10-15	15+
Holiday	7.8	23.4	16.8	13.8	9.0	29.3
To visit family	63.8	8.6	10.3	8.6	3.4	5.2
For business or work	61.5	10.8	7.7	4.6	6.2	9.2

**Table 8: Importance of factors on Australians' decisions to migrate to Bali (n=178)**

	Percentage of survey participants						
	Not important at all	Unimportant	Neither important or unimportant	Important	Very important	Not applicable	No response
Cost of living	5	2	24	39	29	1	0
Cost of housing	5	1	27	37	28	2	0
Quality of housing	6	3	37	35	15	3	1
Access to employment	17	4	20	22	11	22	4
Natural environment	2	4	20	45	25	2	2
Balinese culture	4	4	21	40	29	2	0
Law and order	6	7	37	28	13	7	2
Surfing and diving	29	11	23	12	11	12	2
Servants	21	7	29	23	10	7	3
Relaxed lifestyle	4	2	8	39	46	1	0
Tourist culture	20	16	31	15	9	7	2
Village lifestyle	6	8	28	30	20	6	2
Resort lifestyle	26	17	27	12	7	10	1
Spouses employment	22	7	18	16	8	26	3
A good place to raise children	22	3	18	16	12	26	3

Family and friends	25	10	23	16	7	16	3
Easier on a FIFO roster	30	4	15	6	3	39	3

**Table 9: Significance (Pearson's chi-square) of demographic factors, employment status, visa status and time lived in Bali to factors that motivated people to move to Bali**

	Age (12 degrees of freedom)	Gender (4 degrees of freedom)	Employment (20 degrees of freedom)	Visa Type (24 degrees of freedom)	Time Lived in Bali (16 degrees of freedom)
Cost of living in Bali	9.5	3.6	19.8	18.7	43.5**
Cost of housing in Bali	8	9.2	20.4	26.7	29*
Quality of housing in Bali	15.1	1.8	13	33.5	21.8
Good access to my employment in Bali	28.7**	8.9	47.7**	30.3	13
The natural environment in Bali	15.3	3.5	15.4	27.4	20.5
Balinese culture	4.6	7.6	8.7	15.6	16.6
Law and order in Bali	11.3	2.5	25.5	29.6	21.1
Good surfing/ diving locations	16.8	7.6	21.1	31.3	17.8
Availability of servants/ home help	10.1	4.5	27.7	53.2**	22.4
Relaxed lifestyle in Bali	10.7	4.5	11.8	15.6	15.3
I liked the tourist culture in Bali	8.1	3.5	14.1	20.9	5
Village lifestyle in Bali	15.9	13.1*	21.1	27.8	19.9
Resort lifestyle in Bali	9.3	7.8	15.5	41.5*	11.8
Access to employment for my spouse	12.2	7.4	19.9	17	16.4
To be close to family / friends	17.0	5.1	18	29.5	23.5
Bali seemed like an easier place to live on a FIFO roster	14.6	5.6	35.8*	23.7	28.2*
A good place to raise children	22*	8.1	25.4	33.3	16.8
My spouse wanted to live in Bali	10.1	2.6	13.9	24.9	10.9

\*p<0.05, \*\*p<0.01

The analysis considered variability in the number of responses in the categories 'Not important at all', 'Unimportant', 'Neither important or unimportant', 'Important' and 'Very important'. The categories used for age were: 19-44, 45-54, 55-64, 65-74 and 75+. There were no responses in the 75+ category so this was excluded from the analysis. The categories used for gender were: female and male. The categories used for employment were 'FIFO worker', 'works for business located in Bali', 'works for business located in Australia', 'works for a business located in other country', 'retired' and 'not employed'. The categories used for visa type were: tourist visa, employment visa, business visa, retirement visa, social/cultural visa, family/dependent visa and I don't have a visa. The categories for length of time lived in Bali were: less than 1 year, 1-3 years, 3-5 years, 5-10 years, 10+ years and all my life. There were no valid responses for respondent in the 'all my life' category and therefore this category was not included in the analysis.

**Table 10: How Australians feel about living in Bali (n=162)**

	Percentage of respondents		
	Disagree	Agree	Strongly Agree
I can afford a nicer house in Bali than I could in my home country	16	28	56
My costs of living are lower in Bali than they would be in my home country	8	11	81
I have a better quality of life in Bali than in my home country	8	21	71
I currently have good access to my employment	36	21	43
I prefer Bali's climate to that of my home country	8	22	70
I participate in local Balinese festivals and events	32	23	45
I feel safe living in Bali	20	30	50
It is easy to live a Fly-In-Fly-Out lifestyle in Bali	50	25	25
I mix with more people from different cultural backgrounds in Bali than I did at my last home	11	15	74
I am not worried by living away from my family / friends in my home country	16	14	70
I feel I am part of a strong expat community in Bali	32	26	42
I feel accepted and welcome in my local Balinese community	14	20	66
If I have a serious or long illness I will return to my home country for treatment	25	15	60
My personal relationships have become happier living in Bali	16	24	60
I often feel lonely or isolated in Bali	67	18	15
My lifestyle in Bali has been better than expected	17	25	58
My main recreation is to surf, dive or swim	62	15	23

**Table 11: Significance (Pearson's chi-square) of demographic factors, employment status, visa status and time lived in Bali to how respondents felt about living in Bali**

	<i>Age (12 degrees of freedom)</i>	<i>Gender (4 degrees of freedom)</i>	<i>Employment (20 degrees of freedom)</i>	<i>Visa Type (24 degrees of freedom)</i>	<i>Time Lived in Bali (16 degrees of freedom)</i>
I can afford a nicer house in Bali than I could in my home country	19.1	4.6	13.6	27.3	9.6
My costs of living are lower in Bali than they would be in my home country	11.8	4.8	17.3	24.6	10.6
I have a better quality of life in Bali than in my home country	11.2	1.7	30.4	19.2	24
I currently have good access to my employment	34.8**	4.2	75.2**	40.1*	17.1
I prefer Bali's climate to that of my home country	6.8	1.9	19.4	28	18.4
I participate in local Balinese festivals and events	5.3	15.2**	16.2	14.7	17.4
I feel safe living in Bali	6.8	2.4	29.2	30.9	25.2
It is easy to live a Fly-In-Fly-Out lifestyle in Bali	14.1	2.3	51.7**	15.9	10.8
I mix with more people from different cultural backgrounds in Bali than I did at my last home	8.1	4.2	16.3	23.2	10.2
I am not worried by living away from my family / friends in my home country	16.7	0.1	16.8	19.8	25.7
I feel I am part of a strong expat community in Bali	10.5	5.5	17.1	20	13.2
I feel accepted and welcome in my local Balinese community	9.9	7.4	18	18.4	12.5
If I have a serious or long illness I will return to my home country for treatment	6.5	3.4	21.3	37.8*	18.3
My personal relationships have become happier living in Bali	11.5	1.7	19.1	33	12.8
I often feel lonely or isolated in Bali	8.3	11.3*	30.3	32.5	15.1
My lifestyle in Bali has been better than expected	7.5	5.6	28.1	21	11.5
My main recreation is to surf dive or swim	7.2	2.8	22	39.9*	10.9

\*p<0.05, \*\*p<0.01

The analysis considered variability in the number of responses in the categories 'Not important at all', 'Unimportant', 'Neither important or unimportant', 'Important' and 'Very important'. The categories used for age were: 19-44, 45-54, 55-64, 65-74 and 75+. There were no responses in the 75+ category so this was excluded from the analysis. The categories used for gender were: female and male. The categories used for employment were 'FIFO worker', 'works for business located in Bali', 'works for business located in Australia', 'works for a business located in other country', 'retired' and 'not employed'. The categories used for visa type were: tourist visa, employment visa, business visa, retirement visa, social/cultural visa, family/dependent visa and I don't have a visa. The categories for length of time lived in Bali were: less than 1 year, 1-3 years, 3-5 years, 5-10 years, 10+ years and all my life. There were no valid responses for respondent in the 'all my life' category and therefore this category was not included in the analysis.