

Travel in Indonesia

September 2023

Table of Contents

[Travel in Indonesia](#)

EXECUTIVE SUMMARY

Travel in 2023
Airlines: Key trends
Hotels: Key trends
Booking: Key trends
What next for travel?

MARKET DATA

Table 1 - Surface Travel Modes Sales: Value 2018-2023
Table 2 - Surface Travel Modes Online Sales: Value 2018-2023
Table 3 - Forecast Surface Travel Modes Sales: Value 2023-2028
Table 4 - Forecast Surface Travel Modes Online Sales: Value 2023-2028
Table 5 - In-Destination Spending: Value 2018-2023
Table 6 - Forecast In-Destination Spending: Value 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Tourism Flows in Indonesia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Tourism recovery speeds up as Bali remains top of mind destination
Homecoming remains key driver for domestic tourism

PROSPECTS AND OPPORTUNITIES

Government push to diversify and develop new destinations other than Bali
West Java to gain traction for domestic tourism due to infrastructural improvements

CATEGORY DATA

Table 7 - Inbound Arrivals: Number of Trips 2018-2023
Table 8 - Inbound Arrivals by Country: Number of Trips 2018-2023
Table 9 - Inbound City Arrivals 2018-2023
Table 10 - Inbound Tourism Spending: Value 2018-2023
Table 11 - Forecast Inbound Arrivals: Number of Trips 2023-2028
Table 12 - Forecast Inbound Arrivals by Country: Number of Trips 2023-2028
Table 13 - Forecast Inbound Tourism Spending: Value 2023-2028
Table 14 - Domestic Trips by Destination: Number of Trips 2018-2023
Table 15 - Domestic Spending: Value 2018-2023
Table 16 - Forecast Domestic Trips by Destination: Number of Trips 2023-2028
Table 17 - Forecast Domestic Spending: Value 2023-2028
Table 18 - Outbound Departures: Number of Trips 2018-2023
Table 19 - Outbound Departures by Destination: Number of Trips 2018-2023
Table 20 - Outbound Tourism Spending: Value 2018-2023
Table 21 - Forecast Outbound Departures: Number of Trips 2023-2028
Table 22 - Forecast Outbound Departures by Destination: Number of Trips 2023-2028
Table 23 - Forecast Outbound Spending: Value 2023-2028

[Airlines in Indonesia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Low cost carriers drive recovery for airlines

Non-scheduled carriers growth rebounds with new product offerings

PROSPECTS AND OPPORTUNITIES

Recovery to pre-pandemic levels driven by domestic trips

Infrastructural improvements and promotions expected to drive growth for airlines in the forecast period

CATEGORY DATA

Table 24 - Airlines Sales: Value 2018-2023

Table 25 - Airlines Online Sales: Value 2018-2023

Table 26 - Airlines: Passengers Carried 2018-2023

Table 27 - Airlines NBO Company Shares: % Value 2018-2022

Table 28 - Non-Scheduled Carriers Brands by Key Performance Indicators 2023

Table 29 - Low Cost Carriers Brands by Key Performance Indicators 2023

Table 30 - Full Service Carriers Brands by Key Performance Indicators 2023

Table 31 - Forecast Airlines Sales: Value 2023-2028

Table 32 - Forecast Airlines Online Sales: Value 2023-2028

Lodging (Destination) in Indonesia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mid-market hotels seeing quicker recovery compared to luxury hotels, driven by domestic tourism

Spike in average daily room rate as demand improves

PROSPECTS AND OPPORTUNITIES

Lodgings to see growth in forecast period

OTA remains top of mind choice when booking hotels, except for mid-market options

CATEGORY DATA

Table 33 - Lodging (Destination) Sales: Value 2018-2023

Table 34 - Lodging (Destination) Online Sales: Value 2018-2023

Table 35 - Hotels Sales: Value 2018-2023

Table 36 - Hotels Online Sales: Value 2018-2023

Table 37 - Other Lodging Sales: Value 2018-2023

Table 38 - Other Lodging Online Sales: Value 2018-2023

Table 39 - Lodging (Destination) Outlets: Units 2018-2023

Table 40 - Lodging (Destination) Rooms: Number of Rooms 2018-2023

Table 41 - Lodging (Destination) by Incoming vs Domestic: % Value 2018-2023

Table 42 - Hotels NBO Company Shares: % Value 2018-2022

Table 43 - Hotel Brands by Key Performance Indicators 2023

Table 44 - Forecast Lodging (Destination) Sales: Value 2023-2028

Table 45 - Forecast Lodging (Destination) Online Sales: Value 2023-2028

Table 46 - Forecast Hotels Sales: Value 2023-2028

Table 47 - Forecast Hotels Online Sales: Value 2023-2028

Table 48 - Forecast Other Lodging Sales: Value 2023-2028

Table 49 - Forecast Other Lodging Online Sales: Value 2023-2028

Table 50 - Forecast Lodging (Destination) Outlets: Units 2023-2028

Booking in Indonesia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Online booking drives growth as players offer promotions for packages

Increase in interest in booking surface travel modes amongst value for money driven locals

PROSPECTS AND OPPORTUNITIES

Online booking expected to increase in importance and preference amongst locals with seamless payment options

Key OTA players expected to continue strong marketing and price promotions to capture market share

CATEGORY DATA

Table 51 - Booking Sales: Value 2018-2023

Table 52 - Business Travel Sales: Value 2018-2023

Table 53 - Leisure Travel Sales: Value 2018-2023

Table 54 - Travel Intermediaries NBO Company Shares: % Value 2018-2023

Table 55 - Forecast Booking Sales: Value 2023-2028

Table 56 - Forecast Business Travel Sales: Value 2023-2028

Table 57 - Forecast Leisure Travel Sales: Value 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/travel-in-indonesia/report.