



Passport

Tourism Flows in Indonesia

Euromonitor International

September 2021

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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TOURISM FLOWS IN INDONESIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 IMPACT

Five priority destinations emerge on the road to recovery, although uncertainty remains

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Strongest recovery in domestic tourism as restrictions remain on international travel

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RECOVERY AND OPPORTUNITIES

Confidence in Indonesia's pandemic response to boost recovery of international travel

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Bali set to remain the key element in the recovery of Indonesia's travel industry

Content removed from sample

CATEGORY DATA

Table 1 Inbound Arrivals: Number of Trips 2016-2021

'000 trips	2016	2017	2018	2019	2020	2021
- Air Arrivals	Data removed from sample					
- Land Arrivals						
- Rail Arrivals						
- Water Arrivals						
- Business Arrivals						
- Leisure Arrivals						
- Arrivals by Country of Origin						

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Inbound arrivals is the sum of air, land, rail and water arrivals, or the sum of business and leisure arrivals

Table 2 Inbound Arrivals by Country: Number of Trips 2016-2021

'000 trips	2016	2017	2018	2019	2020	2021
--- Arrivals from Malaysia	Data removed from sample					
--- Arrivals from Singapore						
--- Arrivals from						

Australia
--- Arrivals from China
--- Arrivals from Japan
--- Arrivals from US
--- Arrivals from India
--- Arrivals from Germany
--- Arrivals from France
--- Arrivals from
Philippines
--- Arrivals from Myanmar
--- Arrivals from South
Korea
--- Arrivals from
Cambodia
--- Arrivals from
Netherlands
--- Arrivals from
United Kingdom
--- Arrivals from Brazil
--- Arrivals from Russia
--- Arrivals from
Thailand
--- Arrivals from Poland
--- Arrivals from Ireland
--- Arrivals from Turkey
--- Arrivals from New
Zealand
--- Arrivals from Taiwan
--- Arrivals from Saudi
Arabia
--- Arrivals from Ukraine
--- Arrivals from Italy
--- Arrivals from Vietnam
--- Arrivals from Canada
--- Arrivals from
Argentina
--- Arrivals from
United Arab Emirates
--- Arrivals from Israel
--- Arrivals from Czech
Republic
--- Arrivals from Spain
--- Arrivals from South
Africa
--- Arrivals from Nepal
--- Arrivals from Laos
--- Arrivals from Mexico
--- Arrivals from Greece
--- Arrivals from Hong
Kong, China
--- Arrivals from Sweden
--- Arrivals from
Switzerland
--- Arrivals from
Portugal
--- Arrivals from
Bangladesh
--- Arrivals from Romania
--- Arrivals from Chile
--- Arrivals from Nigeria
--- Arrivals from Hungary

Data removed from sample

--- Arrivals from Papua
New Guinea
--- Arrivals from Iran
--- Arrivals from Denmark
Other Countries
- Arrivals by Country
of Origin

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 3 Inbound City Arrivals 2016-2021

'000 trips

2016 2017 2018 2019 2020 2021

Batam
Denpasar
Jakarta
Medan
Surabaya
Tanjung Uban

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 4 Inbound Receipts: Value 2016-2021

IDR million

2016 2017 2018 2019 2020 2021

-- Inbound Business
Receipts
-- Inbound Leisure
Receipts
-- Inbound Receipts on
Lodging
-- Inbound Receipts on
Activities
-- Inbound Receipts on
Food
-- Inbound Receipts on
Shopping
-- Inbound Receipts on
Travel Modes
-- Other Inbound Receipts

- Inbound Receipts

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Activities includes attractions, guided city tours etc.

Note 2: Food includes restaurants

Note 3: Other inbound receipts include travel agent services

Note 4: Inbound receipts is the sum of business and leisure inbound receipts, or the sum of activities, food, shopping, travel in destination and other inbound receipts

Table 5 Forecast Inbound Arrivals: Number of Trips 2021-2026

'000 trips

2021

2022

2023

2024

2025

2026

- Air Arrivals
- Land Arrivals
- Rail Arrivals
- Water Arrivals
- Business Arrivals
- Leisure Arrivals
- Arrivals by Country of Origin

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Inbound arrivals is the sum of air, land, rail and water arrivals, or the sum of business and leisure arrivals

Table 6 Forecast Inbound Arrivals by Country: Number of Trips 2021-2026

'000 trips

2021

2022

2023

2024

2025

2026

- Arrivals from Malaysia
- Arrivals from Singapore
- Arrivals from Australia
- Arrivals from China
- Arrivals from Myanmar
- Arrivals from Philippines
- Arrivals from Cambodia
- Arrivals from India
- Arrivals from France
- Arrivals from Germany
- Arrivals from Netherlands
- Arrivals from Brazil
- Arrivals from Russia
- Arrivals from Thailand
- Arrivals from Poland
- Arrivals from Turkey
- Arrivals from Ireland
- Arrivals from New Zealand
- Arrivals from Saudi Arabia
- Arrivals from Japan
- Arrivals from US
- Arrivals from Ukraine
- Arrivals from Vietnam
- Arrivals from South Korea
- Arrivals from United Kingdom
- Arrivals from Canada
- Arrivals from Italy

Data removed from sample

--- Arrivals from Argentina
 --- Arrivals from Czech Republic
 --- Arrivals from Israel
 --- Arrivals from United Arab Emirates
 --- Arrivals from Laos
 --- Arrivals from Nepal
 --- Arrivals from Spain
 --- Arrivals from South Africa
 --- Arrivals from Taiwan
 --- Arrivals from Greece
 --- Arrivals from Mexico
 --- Arrivals from Bangladesh
 --- Arrivals from Romania
 --- Arrivals from Chile
 --- Arrivals from Sweden
 --- Arrivals from Hungary
 --- Arrivals from Hong Kong, China
 --- Arrivals from Switzerland
 --- Arrivals from Portugal
 --- Arrivals from Papua New Guinea
 --- Arrivals from Nigeria
 --- Arrivals from Mongolia
 --- Arrivals from Iran
 Other Countries
 - Arrivals by Country of Origin

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 7 Forecast Inbound Receipts: Value 2021-2026

IDR million	2021	2022	2023	2024	2025	2026
-- Inbound Business Receipts -- Inbound Leisure Receipts -- Inbound Receipts on Lodging -- Inbound Receipts on Activities -- Inbound Receipts on Food -- Inbound Receipts on Shopping -- Inbound Receipts on Travel Modes -- Other Inbound Receipts	Data removed from sample					

- Inbound Receipts

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note 1: Activities includes attractions, guided city tours, etc.

Note 2: Food includes restaurants

Note 3: Other inbound receipts include travel agent services

Note 4: Inbound receipts is the sum of business and leisure inbound receipts, or the sum of activities, food, shopping, travel in destination and other inbound receipts

Table 8 Domestic Trips by Destination: Number of Trips 2016-2021

'000 trips

2016 2017 2018 2019 2020 2021

- Domestic Trips By Destination

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 9 Domestic Business Trips by Travel Mode: Number of Trips 2016-2021

'000 trips

2016 2017 2018 2019 2020 2021

-- Domestic Business Trips By Air

-- Domestic Business Trips By Land

-- Domestic Business Trips By Rail

-- Domestic Business Trips By Water

- Domestic Business Trips

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 10 Domestic Leisure Trips by Travel Mode: Number of Trips 2016-2021

'000 trips

2016 2017 2018 2019 2020 2021

-- Domestic Leisure Trips By Air

-- Domestic Leisure Trips By Land

-- Domestic Leisure Trips By Rail

-- Domestic Leisure Trips By Water

- Domestic Leisure Trips

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 11 Domestic Expenditure: Value 2016-2021

IDR million	2016	2017	2018	2019	2020	2021
-- Domestic Business Expenditure	Data removed from sample					
-- Domestic Leisure Expenditure						
-- Domestic Expenditure on Activities						
-- Domestic Expenditure on Food						
-- Domestic Expenditure on Lodging						
-- Domestic Expenditure on Shopping						
-- Domestic Expenditure on Travel Modes						
-- Other Domestic Expenditure						
- Domestic Expenditure						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Domestic expenditure is the sum of business and leisure domestic expenditure, or the sum of activities, food, shopping, travel in destination and other domestic expenditure

Table 12 Forecast Domestic Business Trips by Travel Mode: Number of Trips 2021-2026

'000 trips	2021	2022	2023	2024	2025	2026
-- Domestic Business Trips By Air	Data removed from sample					
-- Domestic Business Trips By Land						
-- Domestic Business Trips By Rail						
-- Domestic Business Trips By Water						
- Domestic Business Trips						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 13 Forecast Domestic Leisure Trips by Travel Mode: Number of Trips 2021-2026

'000 trips	2021	2022	2023	2024	2025	2026
-- Domestic Leisure Trips By Air	Data removed from sample					
-- Domestic Leisure Trips By Land						
-- Domestic Leisure Trips By Rail						

- Domestic Leisure
Trips By Water
- Domestic Leisure Trips

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 14 Forecast Domestic Expenditure: Value 2021-2026

IDR million	2021	2022	2023	2024	2025	2026
-- Domestic Business Expenditure	Data removed from sample					
-- Domestic Leisure Expenditure						
-- Domestic Expenditure on Activities						
-- Domestic Expenditure on Food						
-- Domestic Expenditure on Lodging						
-- Domestic Expenditure on Shopping						
-- Domestic Expenditure on Travel Modes						
-- Other Domestic Expenditure						
- Domestic Expenditure						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Domestic expenditure is the sum of business and leisure domestic expenditure, or the sum of activities, food, shopping, travel in destination and other domestic expenditure

Table 15 Outbound Departures: Number of Trips 2016-2021

'000 trips	2016	2017	2018	2019	2020	2021
- Air Outbound	Data removed from sample					
- Land Outbound						
- Rail Outbound						
- Water Outbound						
- Business Outbound						
- Leisure Outbound						
- Outbound Departures Source Markets						

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Outbound departures is the sum of air, land, rail and water outbound departures, or the sum of business and leisure outbound departures

Table 16 Outbound Departures by Destination: Number of Trips 2016-2021

'000 trips	2016	2017	2018	2019	2020	2021
------------	------	------	------	------	------	------

--- Outbound Departures
to Saudi Arabia
--- Outbound Departures
to Singapore
--- Outbound Departures
to South Korea
--- Outbound Departures
to China
--- Outbound Departures
to Germany
--- Outbound Departures
to Thailand
--- Outbound Departures
to Spain
--- Outbound Departures
to Hong Kong, China
--- Outbound Departures
to Japan
--- Outbound Departures
to Turkey
--- Outbound Departures
to US
--- Outbound Departures
to Australia
--- Outbound Departures
to Taiwan
--- Outbound Departures
to France
--- Outbound Departures
to United Arab Emirates
--- Outbound Departures
to Macau, China
--- Outbound Departures
to Egypt
--- Outbound Departures
to Switzerland
--- Outbound Departures
to Italy
--- Outbound Departures
to United Kingdom
--- Outbound Departures
to Philippines
--- Outbound Departures
to Qatar
--- Outbound Departures
to India
--- Outbound Departures
to Israel
--- Outbound Departures
to Vietnam
--- Outbound Departures
to Malaysia
--- Outbound Departures
to Portugal
--- Outbound Departures
to Cambodia
--- Outbound Departures
to Cuba
--- Outbound Departures
to Netherlands

Data removed from sample

--- Outbound Departures
to Canada
 --- Outbound Departures
to Slovakia
 --- Outbound Departures
to Greece
 --- Outbound Departures
to Jordan
 --- Outbound Departures
to Oman
 --- Outbound Departures
to Austria
 --- Outbound Departures
to Poland
 --- Outbound Departures
to Brunei Darussalam
 --- Outbound Departures
to Belgium
 --- Outbound Departures
to Russia
 --- Outbound Departures
to Denmark
 --- Outbound Departures
to Pakistan
 --- Outbound Departures
to New Zealand
 --- Outbound Departures
to Croatia
 --- Outbound Departures
to Bahrain
 --- Outbound Departures
to Finland
 --- Outbound Departures
to Czech Republic
 --- Outbound Departures
to Myanmar
 --- Outbound Departures
to Ireland
 --- Outbound Departures
to Hungary
 Other Countries
 - Outbound Departures
Source Markets

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 17 Outbound Expenditure: Value 2016-2021

IDR million

2016 2017 2018 2019 2020 2021

-- Outbound Business
Expenditure
 -- Outbound Leisure
Expenditure
 -- Outbound Expenditure
on Lodging
 -- Outbound Expenditure
on Activities

Data removed from sample

- Outbound Expenditure on Food
- Outbound Expenditure on Shopping
- Outbound Expenditure on Travel Modes
- Other Outbound Expenditure
- Outbound Expenditure

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Outbound expenditure is the sum of business and leisure outbound expenditure, or the sum of activities, food, shopping, travel in destination and other outbound expenditure

Table 18 Forecast Outbound Departures: Number of Trips 2021-2026

'000 trips

2021 2022 2023 2024 2025 2026

- Air Outbound
- Land Outbound
- Rail Outbound
- Water Outbound
- Business Outbound
- Leisure Outbound
- Outbound Departures Source Markets

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Outbound departures is the sum of air, land, rail and water outbound departures, or the sum of business and leisure outbound departures

Table 19 Forecast Outbound Departures by Destination: Number of Trips 2021-2026

'000 trips

2021 2022 2023 2024 2025 2026

- Outbound Departures to Malaysia
- Outbound Departures to Singapore
- Outbound Departures to Saudi Arabia
- Outbound Departures to China
- Outbound Departures to Thailand
- Outbound Departures to South Korea
- Outbound Departures to Japan
- Outbound Departures to Germany
- Outbound Departures to Hong Kong, China
- Outbound Departures to Spain

Data removed from sample

--- Outbound Departures
to Australia
--- Outbound Departures
to Vietnam
--- Outbound Departures
to Macau, China
--- Outbound Departures
to Turkey
--- Outbound Departures
to US
--- Outbound Departures
to Taiwan
--- Outbound Departures
to Netherlands
--- Outbound Departures
to Philippines
--- Outbound Departures
to United Arab Emirates
--- Outbound Departures
to Cambodia
--- Outbound Departures
to United Kingdom
--- Outbound Departures
to India
--- Outbound Departures
to Switzerland
--- Outbound Departures
to Portugal
--- Outbound Departures
to Israel
--- Outbound Departures
to Egypt
--- Outbound Departures
to Pakistan
--- Outbound Departures
to Canada
--- Outbound Departures
to France
--- Outbound Departures
to Brunei Darussalam
--- Outbound Departures
to Qatar
--- Outbound Departures
to Slovakia
--- Outbound Departures
to Italy
--- Outbound Departures
to New Zealand
--- Outbound Departures
to Oman
--- Outbound Departures
to Slovenia
--- Outbound Departures
to Finland
--- Outbound Departures
to Jordan
--- Outbound Departures
to Cuba
--- Outbound Departures
to Poland
--- Outbound Departures

Data removed from sample

to Hungary
 --- Outbound Departures
 to Myanmar
 --- Outbound Departures
 to Austria
 --- Outbound Departures
 to Greece
 --- Outbound Departures
 to Croatia
 --- Outbound Departures
 to Russia
 --- Outbound Departures
 to Belgium
 --- Outbound Departures
 to Bahrain
 --- Outbound Departures
 to Morocco
 --- Outbound Departures
 to Norway
 Other Countries
 - Outbound Departures
 Source Markets

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Outbound Expenditure: Value 2021-2026

IDR million

2021 2022 2023 2024 2025 2026

-- Outbound Business
 Expenditure
 -- Outbound Leisure
 Expenditure
 -- Outbound Expenditure
 on Lodging
 -- Outbound Expenditure
 on Activities
 -- Outbound Expenditure
 on Food
 -- Outbound Expenditure
 on Shopping
 -- Outbound Expenditure
 on Travel Modes
 -- Other Outbound
 Expenditure
 - Outbound Expenditure

Data removed from sample

Source: UNWTO, Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Outbound expenditure is the sum of business and leisure outbound expenditure, or the sum of activities, food, shopping, travel in destination and other outbound expenditure

TRAVEL IN INDONESIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Travel in 2021

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COVID-19 impact on travel

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Company response to COVID-19 in 2021: Airlines and hotels

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Content removed from sample

Impact of COVID-19 on online bookings and travel intermediaries in 2021

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What next for travel?

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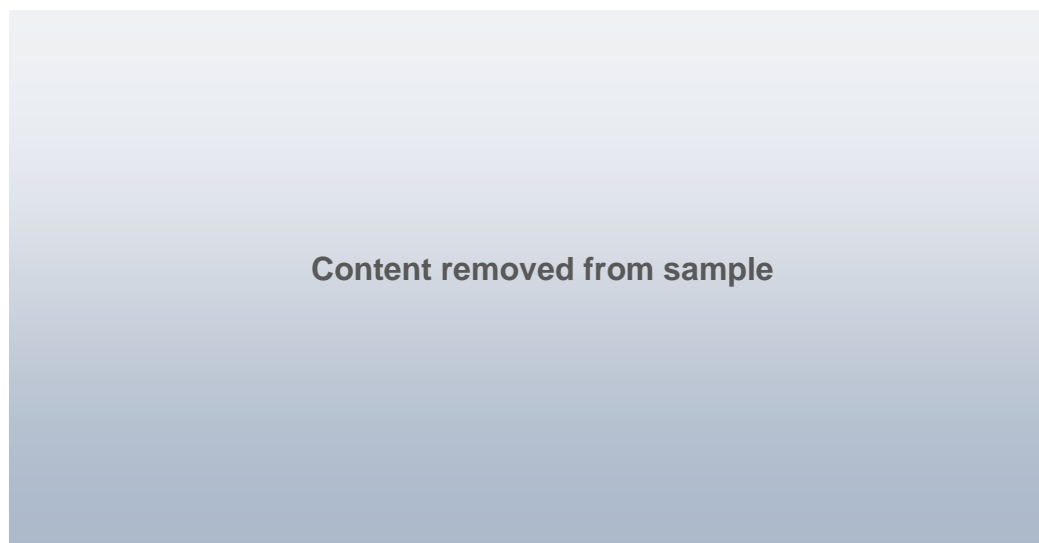
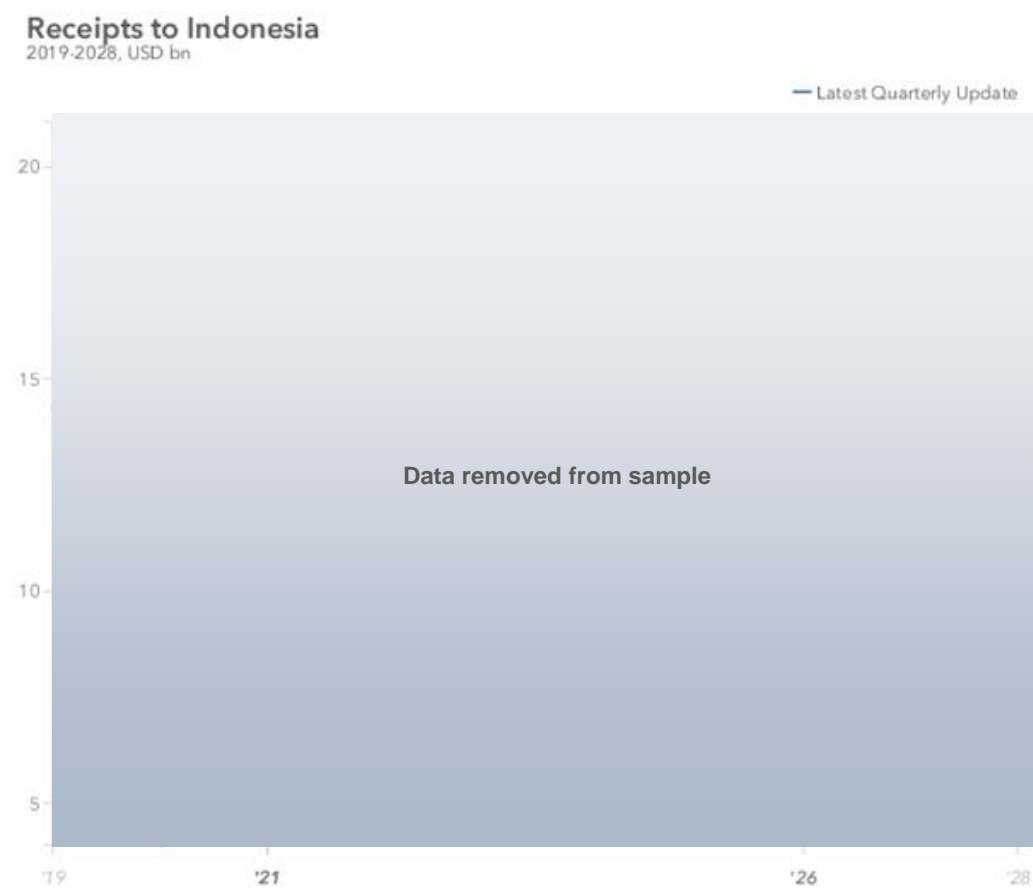


Chart 1 Inbound Receipts: 2021-2026

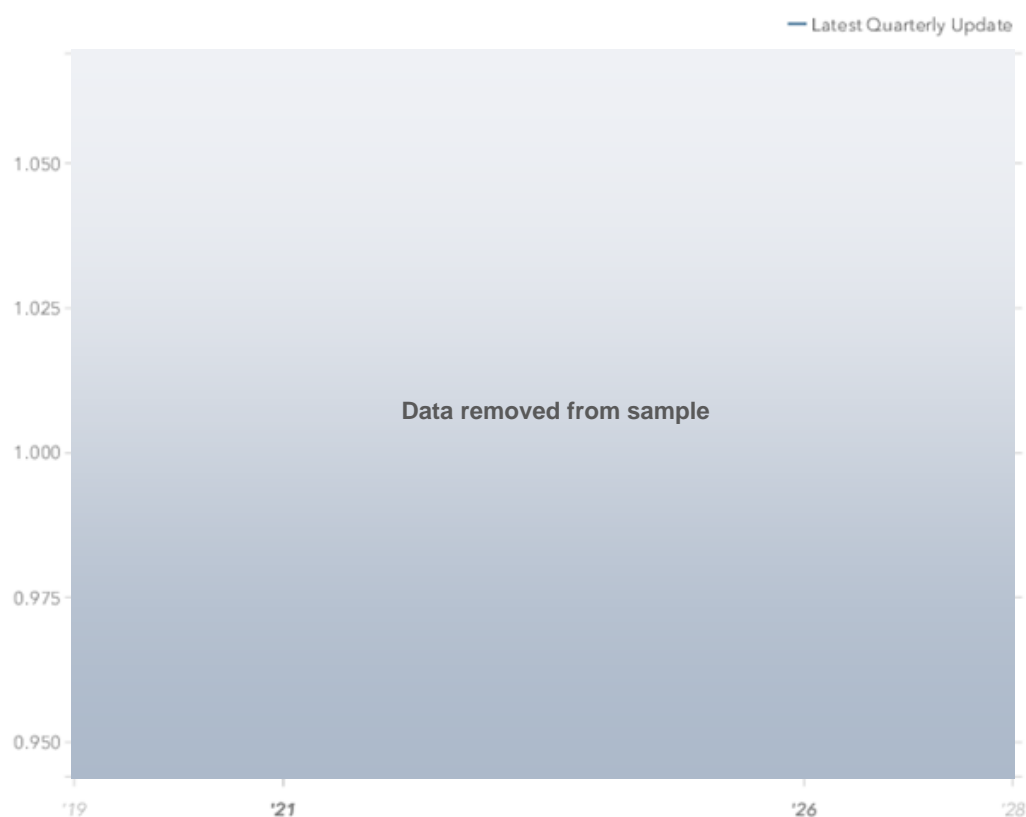


Source: Euromonitor International Travel Forecast Model

Chart 2 Average Spend per Trip for Inbound Arrivals: 2021-2026

Spend per Arrival to Indonesia

2019-2028, USD '000's



Source: Euromonitor International Travel Forecast Model

MARKET DATA

Table 21 Other Transport Sales: Value 2016-2021

IDR million	2016	2017	2018	2019	2020	2021
- Bus	Data removed from sample					
- Cruise						
- Ferry						
- Rail						
- Other Transport Types						
- Other Transport Offline						
- Other Transport Online						
Other Transport						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Other transport is the sum of cruise, bus, ferry, rail and other transport types, or the sum of online and offline sales

Table 22 Other Transport Online Sales: Value 2016-2021

IDR million	2016	2017	2018	2019	2020	2021
-- Other Transport Online Direct	Data removed from sample					
-- Other Transport Online Intermediaries						
- Other Transport Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Other Transport Sales: Value 2021-2026

IDR million	2021	2022	2023	2024	2025	2026
- Bus	Data removed from sample					
- Cruise						
- Ferry						
- Rail						
- Other Transport Types						
- Other Transport Offline						
- Other Transport Online						
Other Transport						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Other transport is the sum of cruise, bus, ferry, rail and other transport types, or the sum of online and offline sales

Table 24 Forecast Other Transport Online Sales: Value 2021-2026

IDR million	2021	2022	2023	2024	2025	2026
-- Other Transport Online Direct	Data removed from sample					
-- Other Transport Online Intermediaries						
- Other Transport Online						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 25 Activities and Experiences: Value 2016-2021

IDR million	2016	2017	2018	2019	2020	2021
Attractions and Experiences - Culture, Heritage and Museums - Casinos - National Parks - Theme Parks - Other Attractions and Experiences - Attractions and Experiences Offline - Attractions and Experiences Online Medical Tourism Spas Activities and Experiences	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Attractions and experiences is the sum of culture, heritage and museums, casinos, national parks, theme parks and other attractions and experiences, or the sum of online and offline sales

Table 26 Forecast Activities and Experiences: Value 2021-2026

IDR million	2021	2022	2023	2024	2025	2026
Attractions and Experiences - Culture, Heritage and Museums - Casinos - National Parks - Theme Parks - Other Attractions and Experiences - Attractions and Experiences Offline - Attractions and Experiences Online Medical Tourism Spas Activities and Experiences	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Attractions and experiences is the sum of culture, heritage and museums, casinos, national parks, theme parks and other attractions and experiences, or the sum of online and offline sales

GLOBAL INDUSTRY ENVIRONMENT

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DISCLAIMER

Forecast closing date: 16 August 2021

Report closing date: 25 August 2021

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources

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	Content removed from sample
Trade Associations	

	Content removed from sample
Trade Press	

Content removed from sample

Source: Euromonitor International