

Indonesia - Travel & Tourism: A growing tourism market (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

The total tourist volume in Indonesia increased at a CAGR of 1.4% over 2012-16, from 260.4 million in 2012 to 275.6 million in 2016, and is forecast to increase at a CAGR of 4.1%, from 281.0 million in 2017 to reach 331.2 million by 2021. The growth is primarily attributed to increasing domestic tourist volumes and promotional tie-ups, the launch of tourist centric campaigns, increased arrival of tourists from countries such as China, and the relaxation of visa policies by the government.

In terms of passenger airlines, Indonesia showcased strong growth for the number of seats available, number of seats sold, and total passenger revenue. This is due to the increased popularity and usage of low cost carriers, as well as the launch of new direct international routes between Indonesia and other countries, including India.

MarketLine Premium's industry reports provide a comprehensive market view including sections on: risk and reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, industry innovation, deals and key developments.

KEY HIGHLIGHTS

Domestic trips to drive tourist volumes

The total tourist volume in Indonesia increased at a CAGR of 1.4%, from 260.4 million in 2012 to 275.6 million in 2016, and is forecast to increase at a CAGR of 4.1%, from 281.0 million in 2017 to 331.2 million in 2021. Growth is primarily due to the rising number of domestic leisure and business trips. Total domestic trips increased at a CAGR of 1.1%, from 244.9 million in 2012 to 256.3 million in 2016, and are forecast to increase at a CAGR of 4.0%, from 260.8 million in 2017 to 305.3 million in 2021 due to rising disposable incomes and improved connectivity between major cities and remote locations across Indonesia's provinces.

Increased tourist volumes to drive passenger airline revenue

Total passenger airline revenue is forecast to increase at a CAGR of 4.2%, from US\$8,581.7 million in 2017 to US\$10,121.7 million in 2021. Over the forecast period, growth will be driven by the rising revenue of low cost carriers from international routes to and from Thailand, Singapore, and Malaysia, along with regional domestic routes. Increased revenue of full service airlines from long-haul international routes will also support the market.

Upscale hotels to drive hotel revenue

Total hotel revenue increased at a CAGR of 6.7%, from US\$6,824.6 million in 2012 to US\$8,867.7 million in 2016, and is forecast to increase at a CAGR of 9.4%, from US\$10,015.6 million in 2017 to US\$14,396.1 million in 2021. Growth is due to the increase in revenue from the upscale and luxury hotel segments, owing to the rise in international tourist arrivals for business and leisure purposes.

SCOPE

Risk & Reward Index - This compares the position of the Indonesian travel and tourism industry with regards to other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View - Key travel and tourism industry statistics, including total revenue and expenditure for key industry segments and the trends driving market performance in the Indonesian travel and tourism market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Indonesian travel and tourism market.

Industry Benchmarking - Benchmark how the Indonesian travel and tourism market is performing compared to regional and global markets in terms of car rental fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, revenue of travel intermediaries and tourism expenditure growth.

Competitive Landscape - Overview of relevant players in the Indonesian travel and tourism industry such as airlines, hotels and car rental companies, with each player in the relevant category compared with its peers in terms of relevant industry indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the Indonesian travel and tourism industry compared to other countries in the Asia-Pacific?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the Indonesian travel and tourism industry and their overview and product portfolio?

What trends are being witnessed within the Indonesian travel and tourism industry?

What are the Indonesian travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Indonesian travel and tourism industry?

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