



# POWER-UP

EDUCATION & NETWORKING EVENT

**BALI**

20 MAR 2025

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FOR COMMERCIAL HOTELIERS



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# INDONESIA MARKET PERFORMANCE & OUTLOOK TRENDS



**MATTHEW FAULL**  
SVP IT & E-Commerce  
Swiss-Belhotel International



**BALI**

## **POWER-UP**

**EDUCATION & NETWORKING**

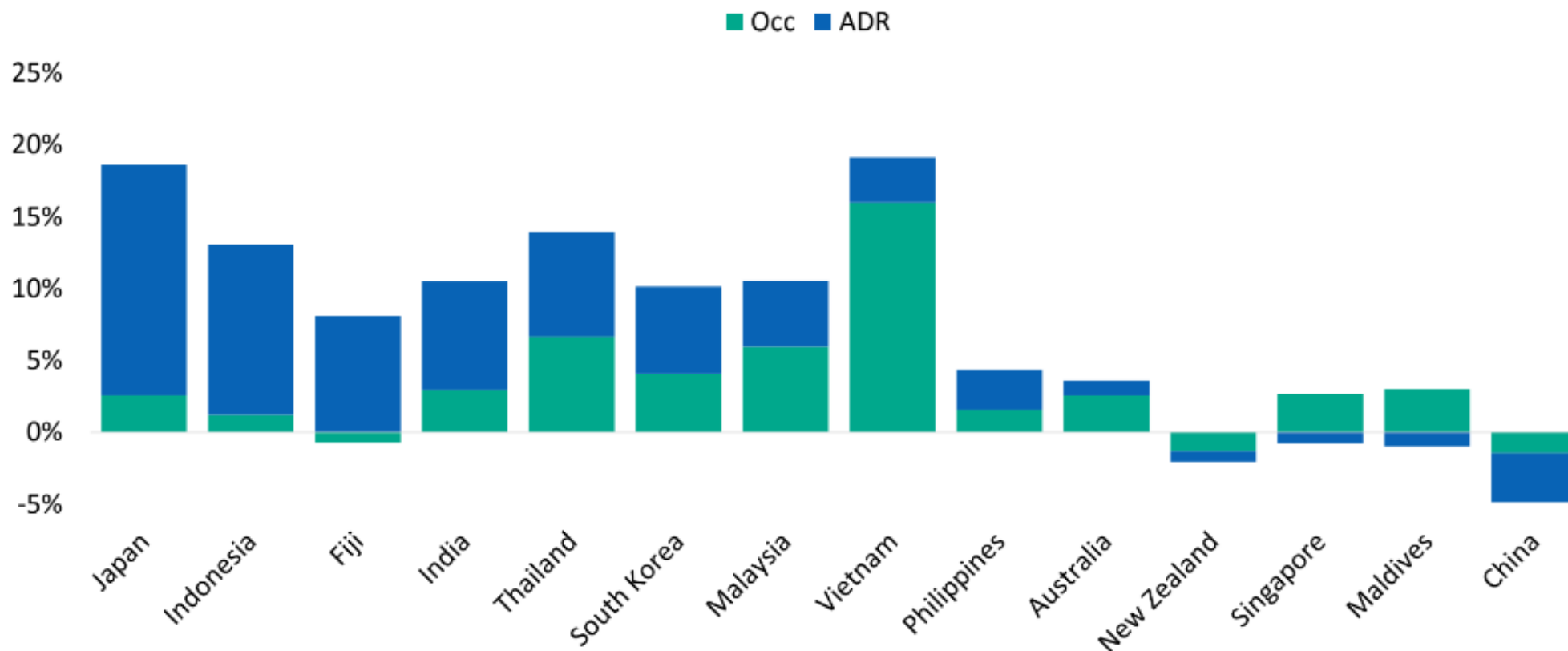
For Commercial Hoteliers



# Occupancy Growth of Indonesia vs ASEAN

## Indonesia ranked highly for growth these past 12 months

APAC Countries, Occ % & ADR % change to prior year, YE 2024



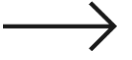


# Are We Back to Pre-Covid Levels?

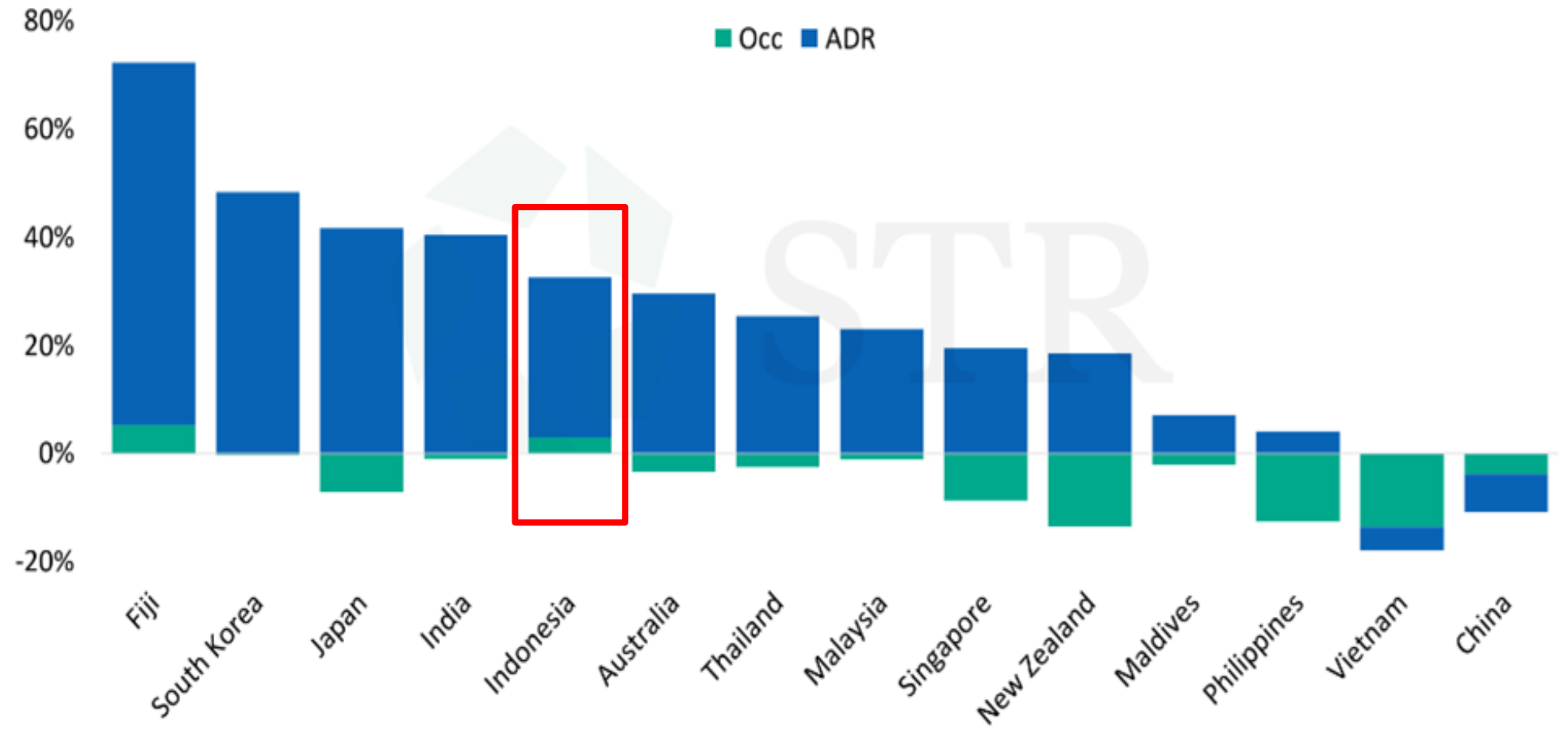
YES YES YES. That happened last year for pretty much everywhere in Indonesia.

**We don't need to talk about COVID anymore.**

**Its History. Gone Gone Gone**

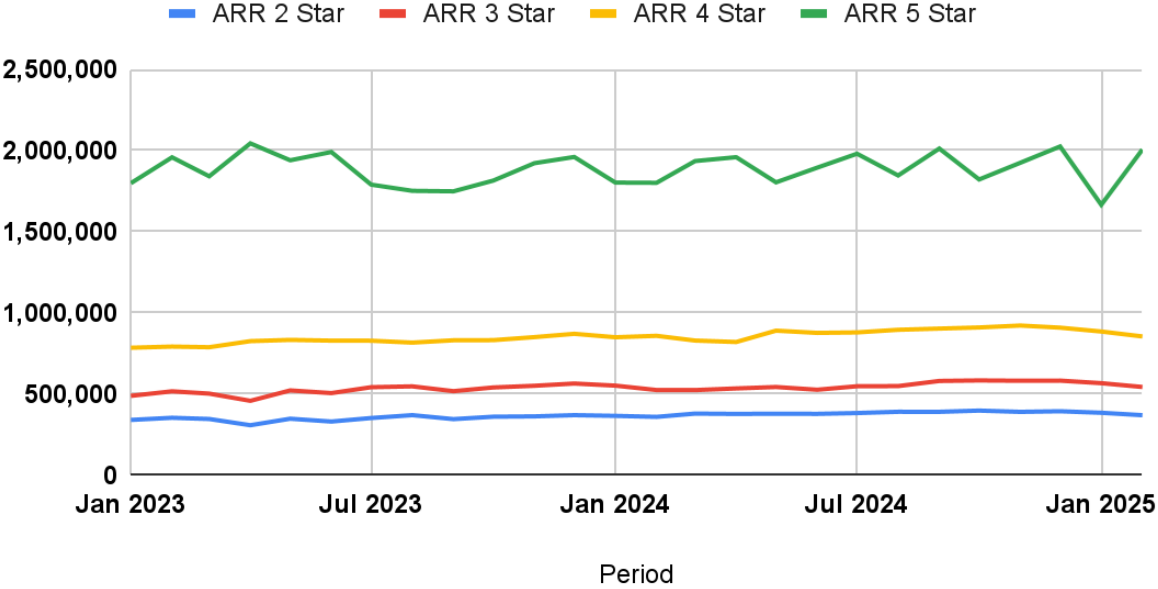


## APAC Countries, Occ % & ADR % changer to 2019, YE 2024

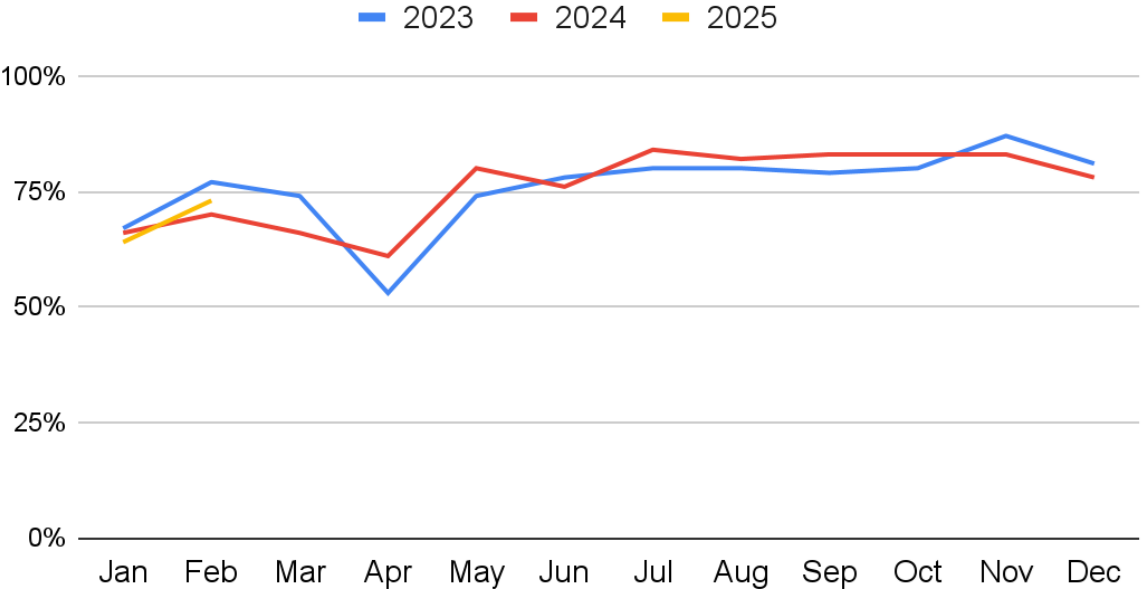


# Jakarta Hotels

ARR Jakarta



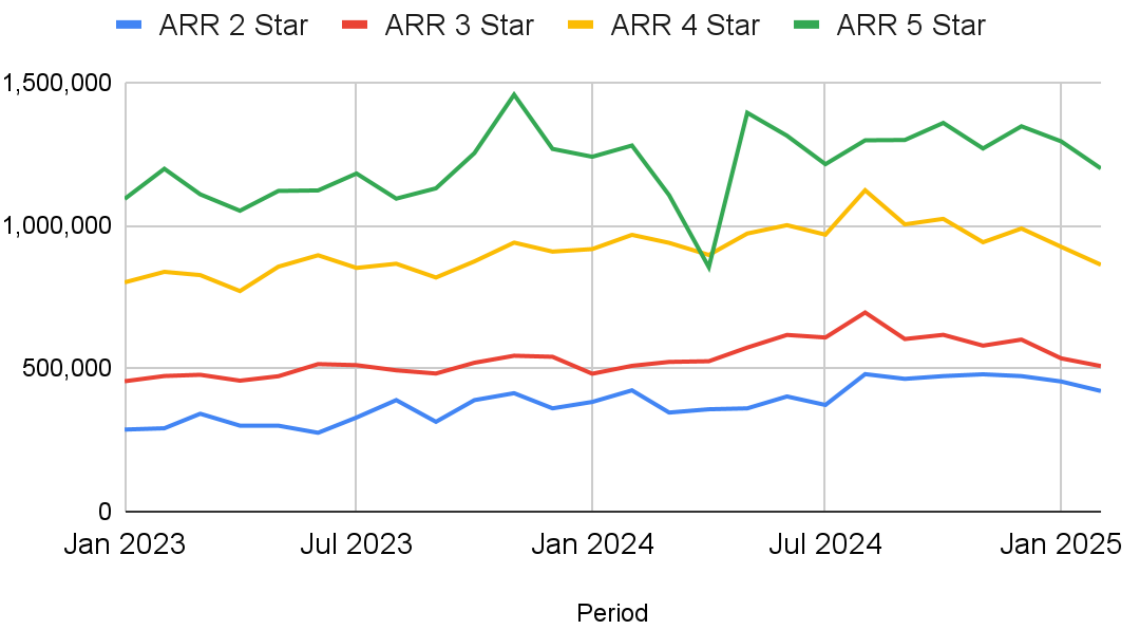
Jakarta Hotel Occupancy



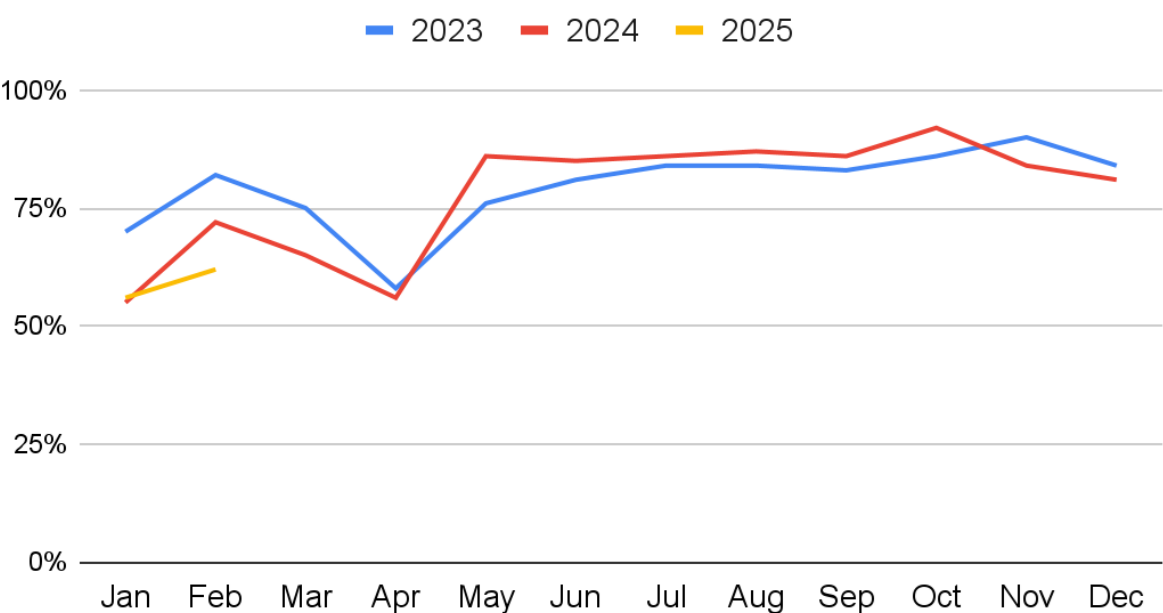
## Indonesia Market Performance & Outlook Trends 2025

# Balikpapan Hotels

ARR Balikpapan



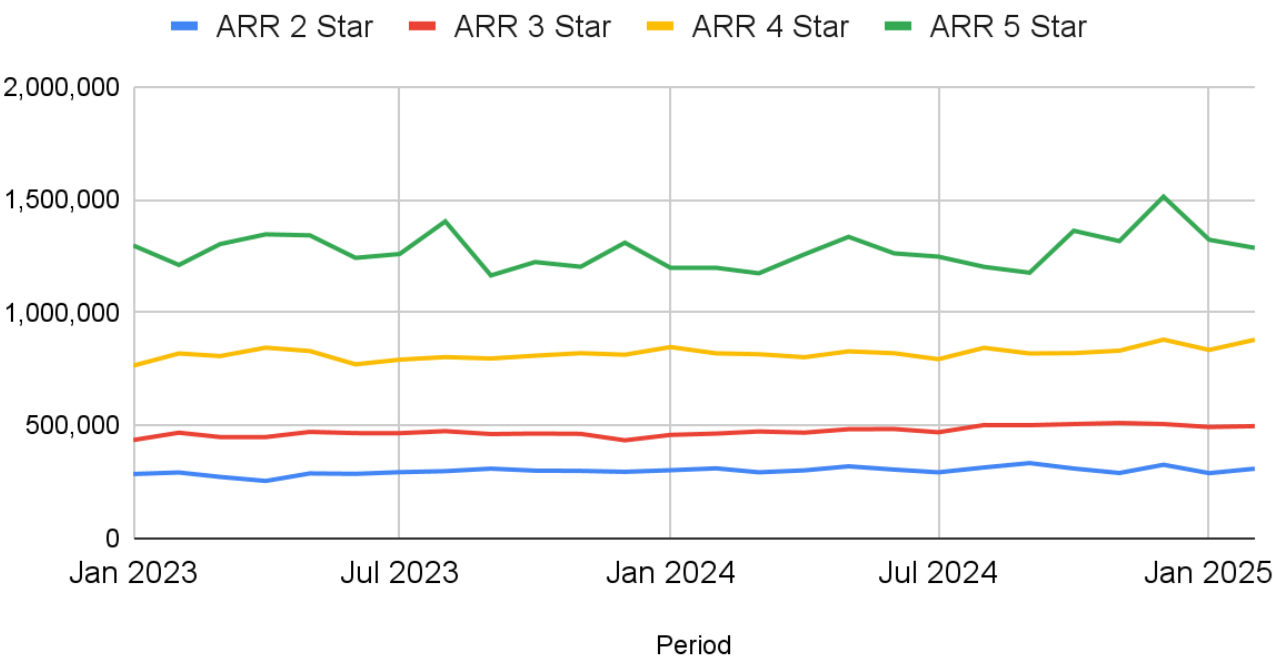
Balikpapan Hotel Occupancy



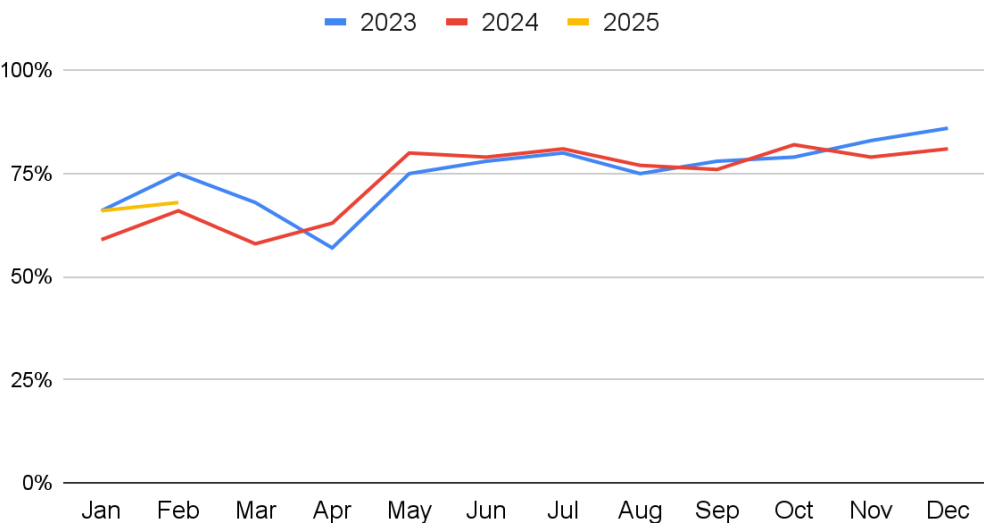
## Indonesia Market Performance & Outlook Trends 2025

# Surabaya Hotels

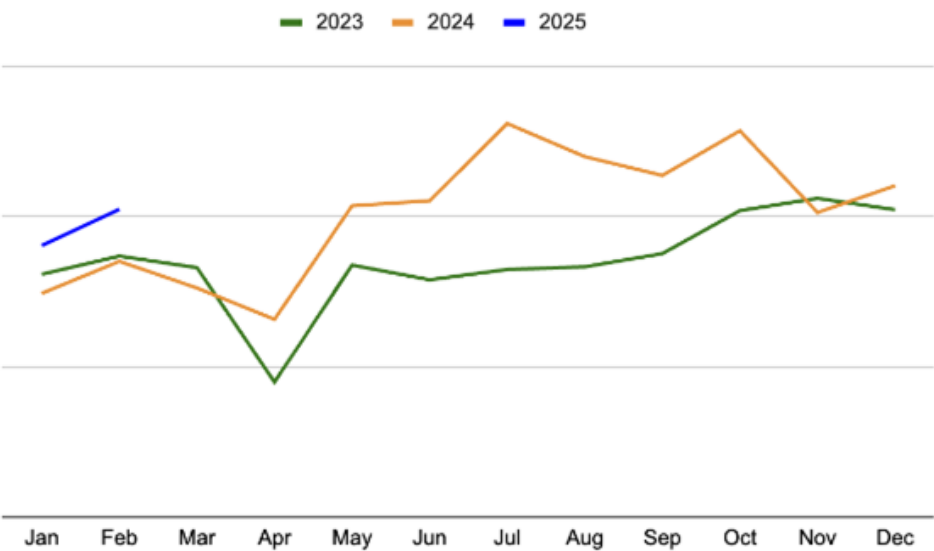
## ARR Surabaya



## Surabaya Hotel Occupancy



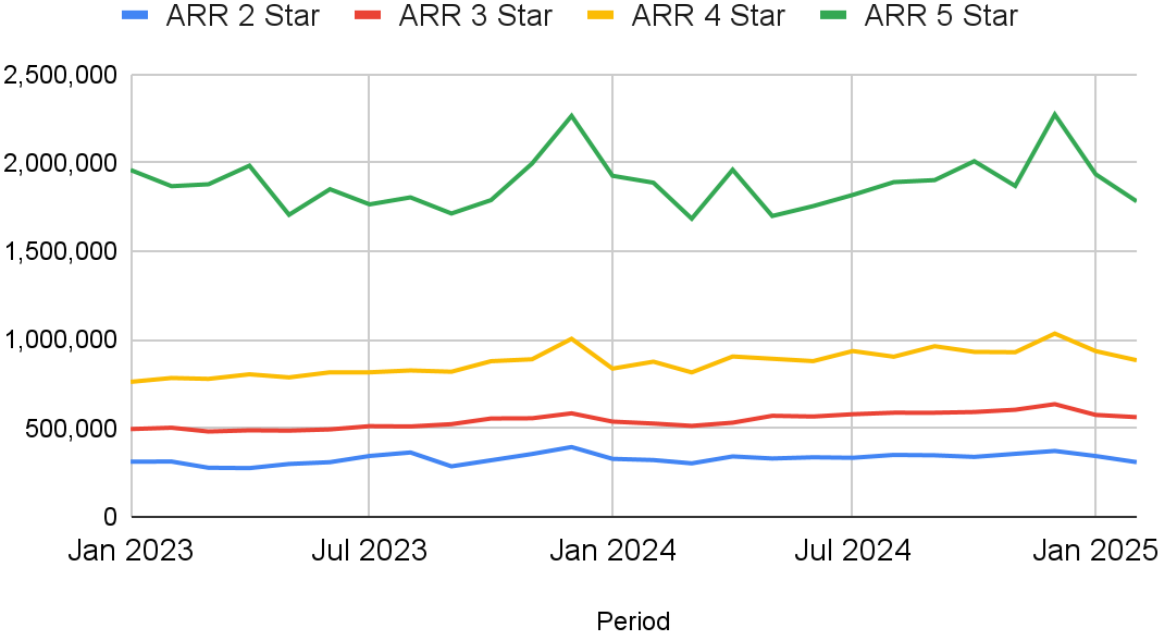
## Surabaya Room Nights



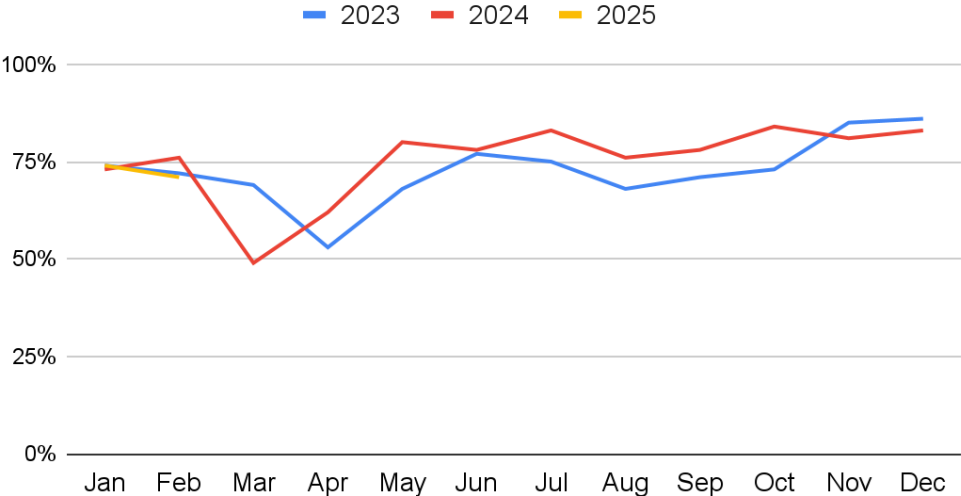


# Bandung Hotels

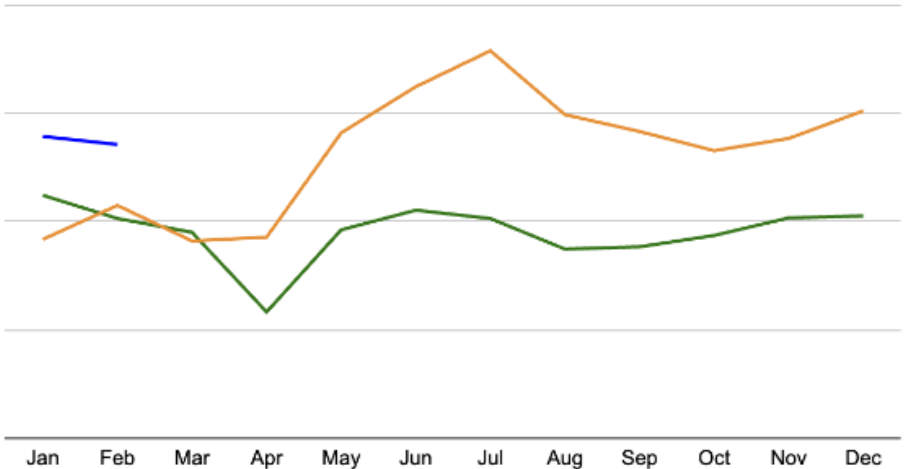
## ARR Bandung



## Bandung Hotel Occupancy

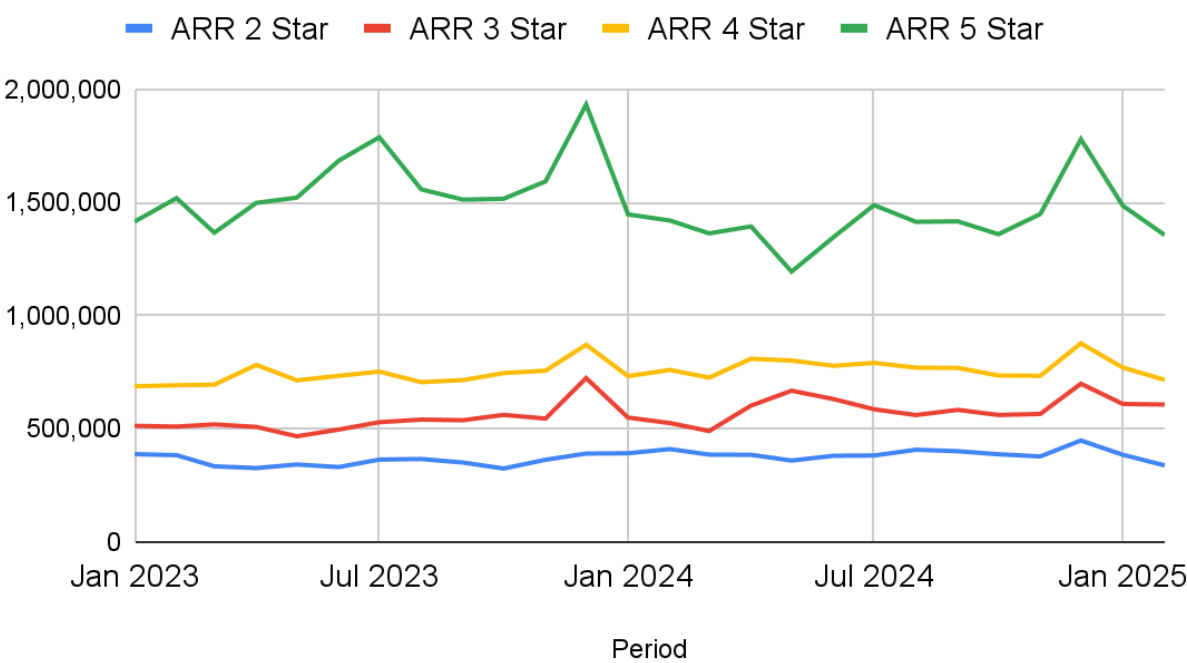


## Bandung Room Nights

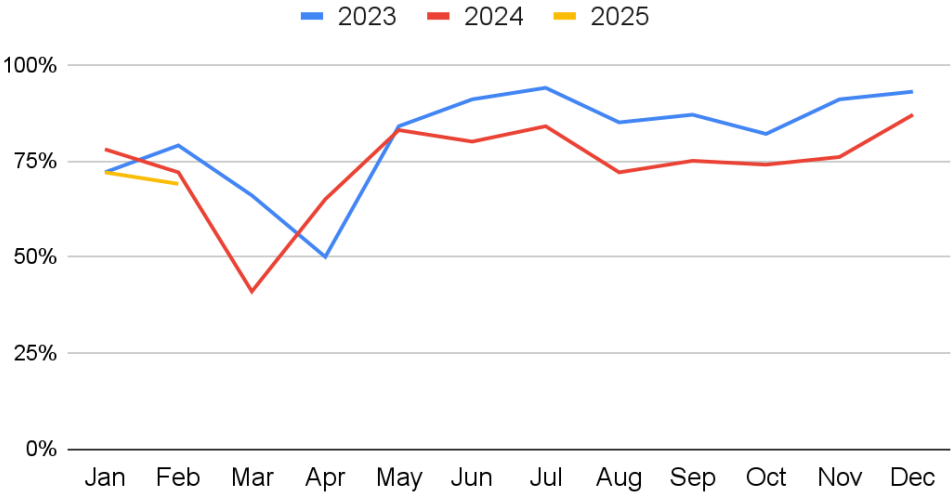


# Yogyakarta Hotels

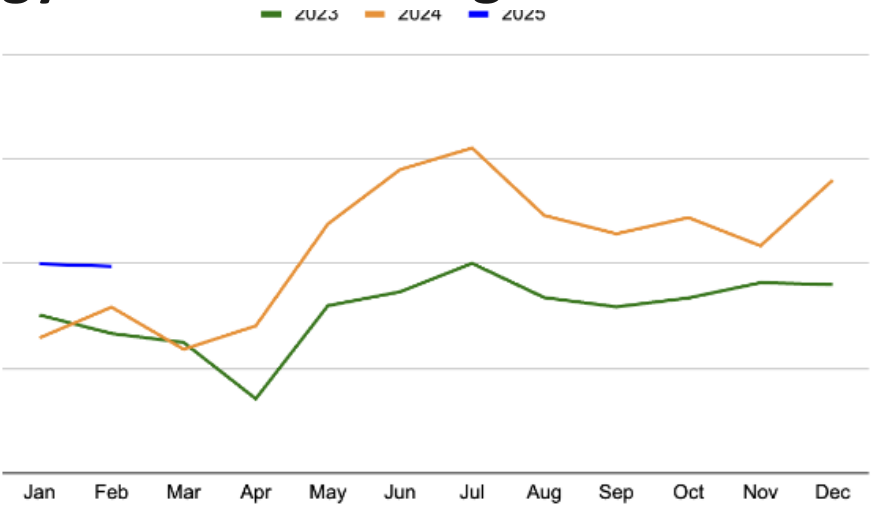
## ARR Yogyakarta



## Yogyakarta Hotel Occupancy

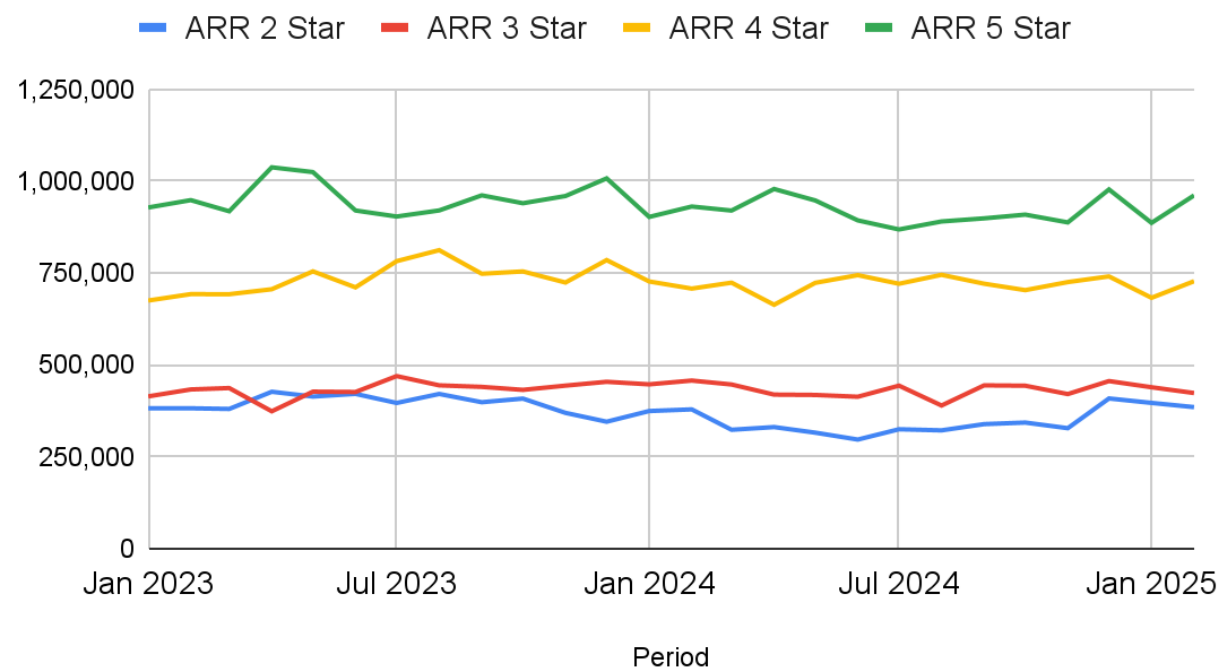


## Yogyakarta Room Nights

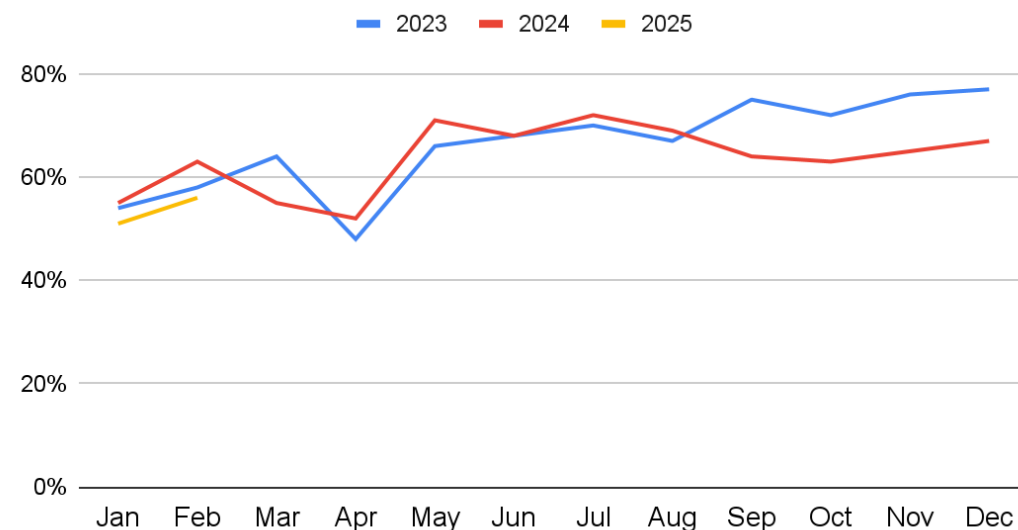


# Makassar Hotels

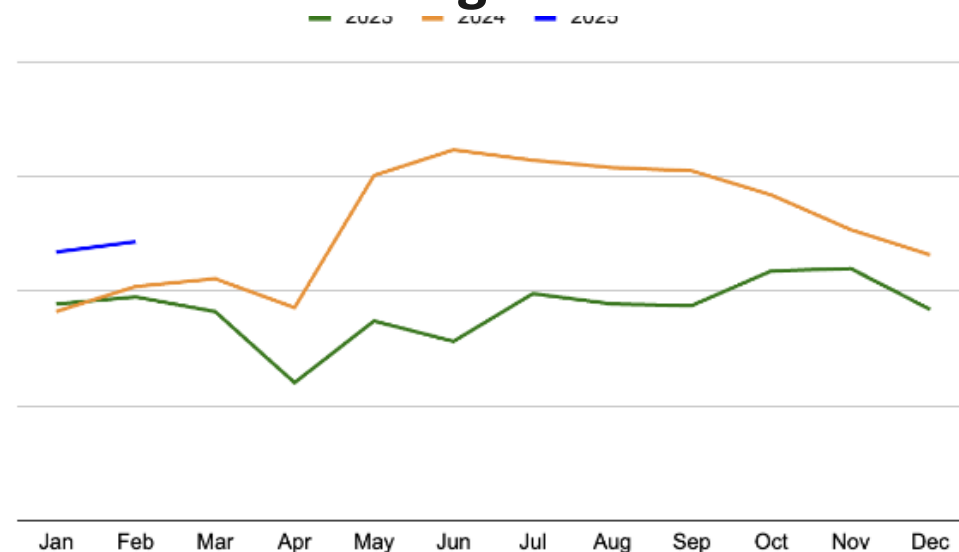
## ARR Makassar



## Makassar Hotel Occupancy

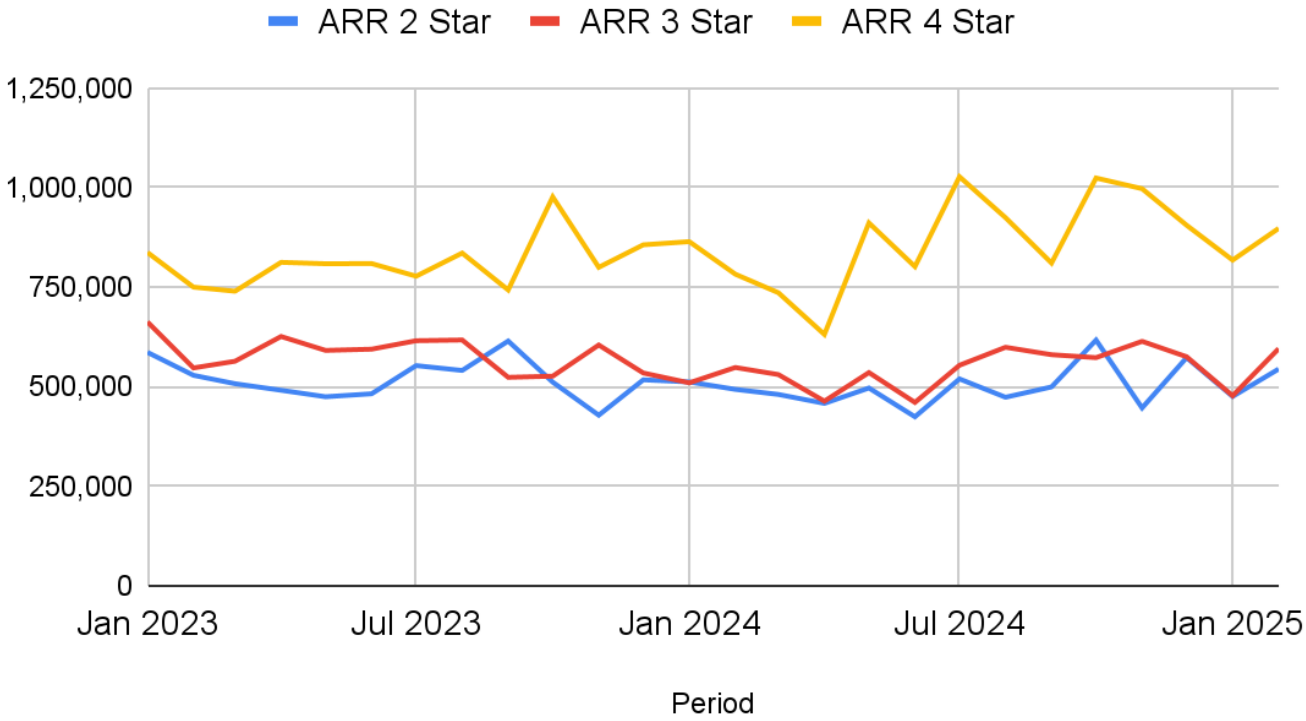


## Makassar Room Nights

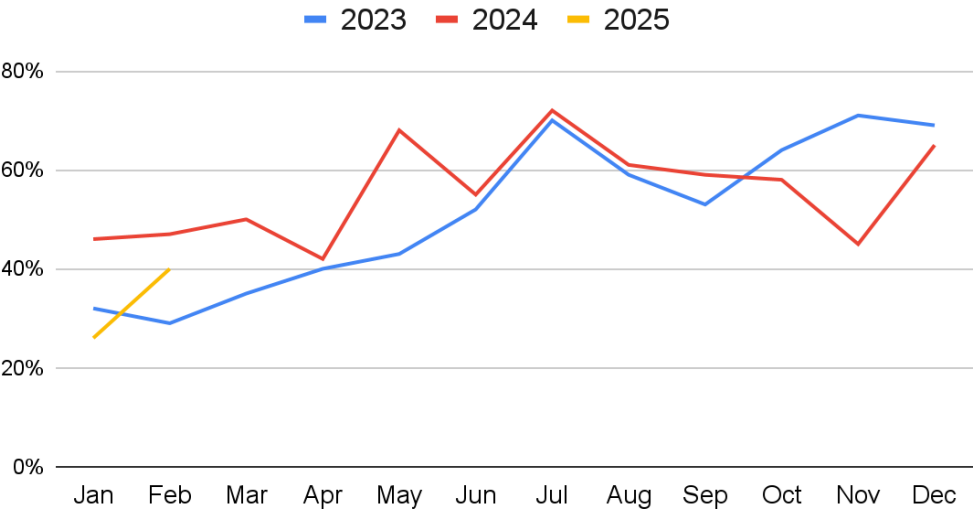


# Jayapura Hotels

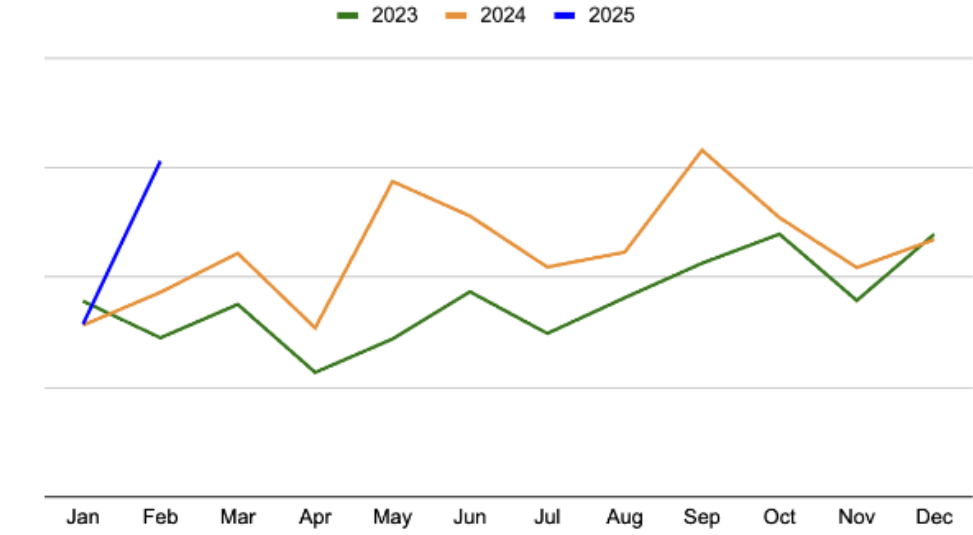
## ARR Jayapura



## Jayapura Hotel Occupancy

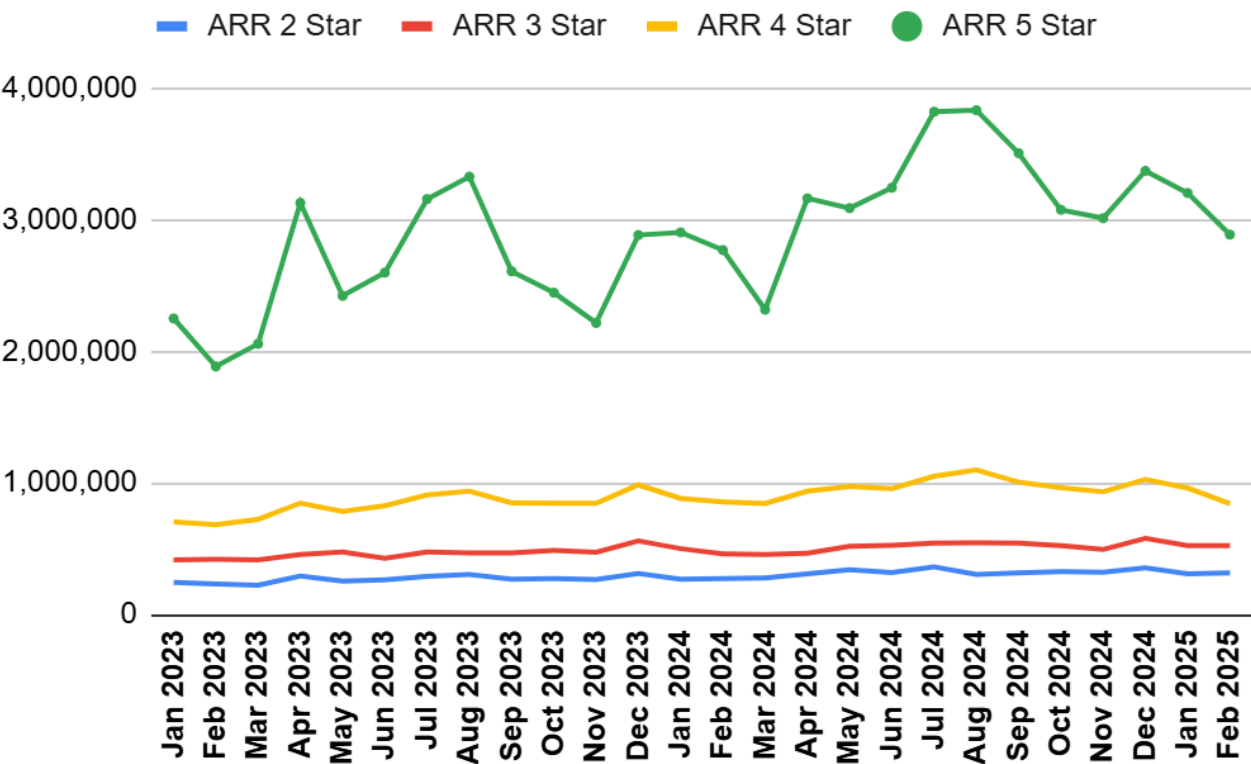


## Jayapura Room Nights

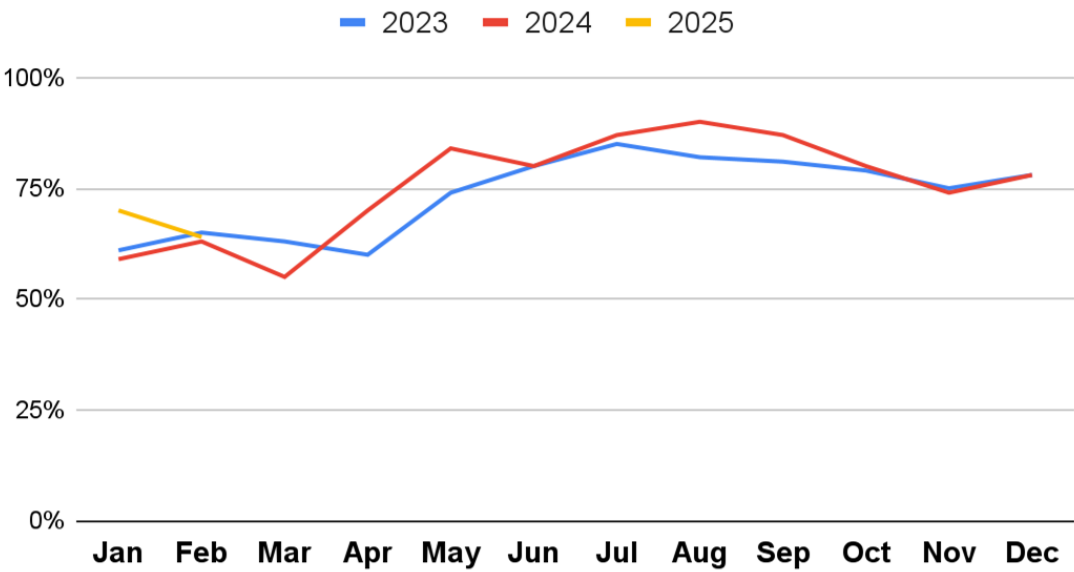


# Bali Hotels

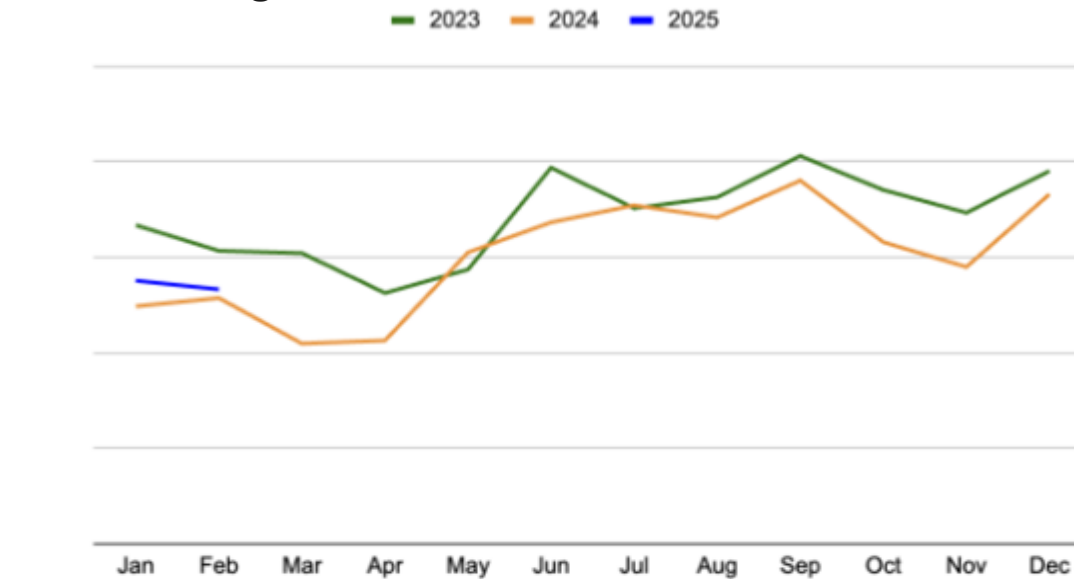
## ARR Bali



## Bali Hotel Occupancy



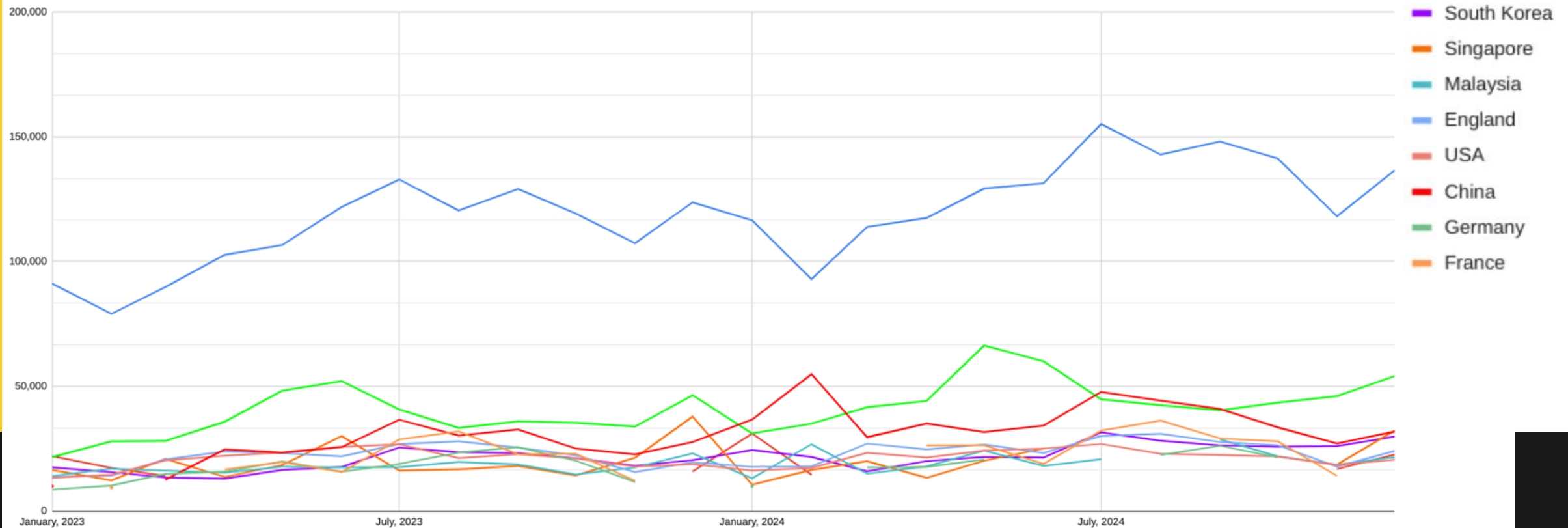
## Bali Room Nights





# Bali Tourists - What's going on?

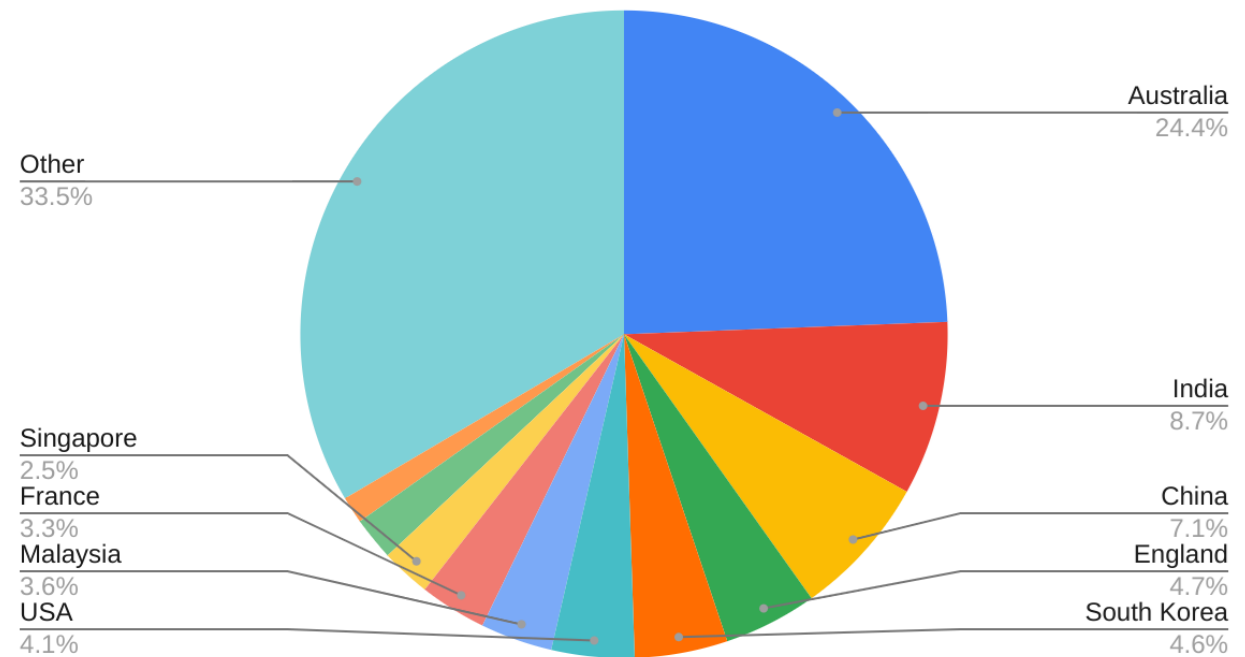
International Tourist Arrivals to Bali 2023-2024



# Bali Tourists - What's going on?

Ranking	Country	2023	2024	Growth
1	Australia	1,324,410	1,544,022	16.58%
2	India	440,415	550,318	24.95%
3	China	272,216	448,429	64.73%
4	England	256,359	295,313	15.20%
5	South Korea	226,789	294,019	29.64%
6	USA	248,983	261,843	5.17%
7	Malaysia	210,112	227,634	8.34%
8	France	180,526	211,834	17.34%
9	Singapore	237,365	157,039	-33.84%
10	Germany	185,821	136,602	-26.49%
11	Russia	69,581	85,468	22.83%
	Other	1,615,723	2,118,137	
	<b>Total</b>	<b>5,268,300</b>	<b>6,330,658</b>	<b>20.17%</b>

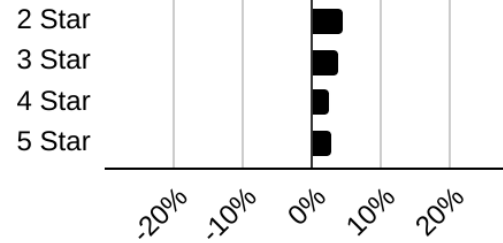
2024 Top 11 Bali Tourist Sources



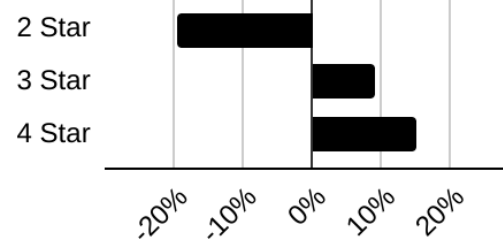
# Indonesia Outlook for 2025

- The graphs show the year on year revpar increase for January and February 2025 vs 2024
- **In general 2025 is NOT looking as good as expected.**
- Yogyakarta, Makassar and Balikpapan don't look great. Jayapura looks very disappointing
- In general the 4 and 5 stars seem to be performing better.
- Our internal numbers for forward bookings for April onwards looking better than last year for FIT for the same time period ( Finally getting more advance bookings in Indonesia!! )

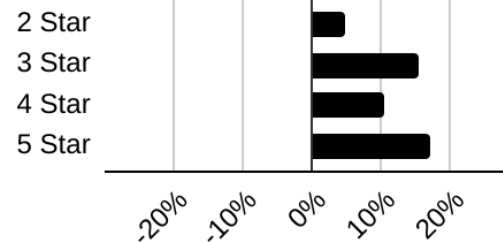
## Jakarta



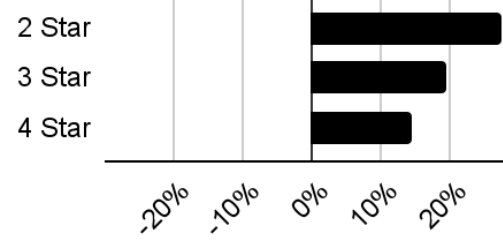
## Medan



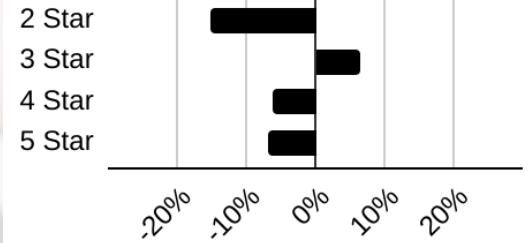
## Surabaya



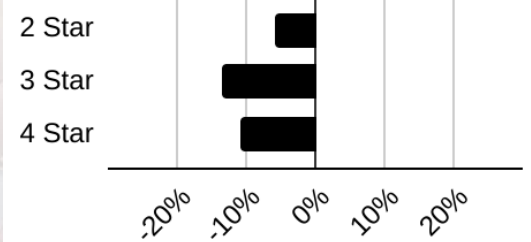
## Bali



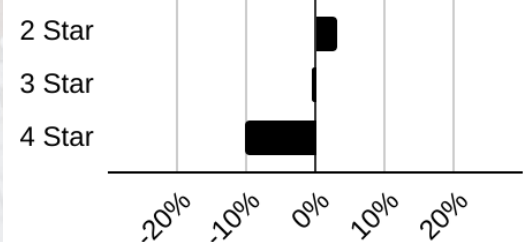
## Yogyakarta



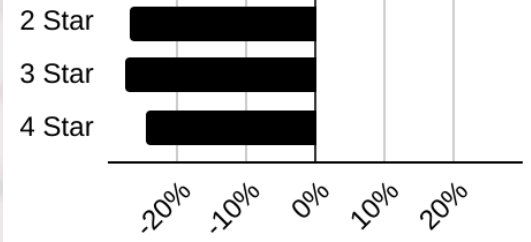
## Makassar



## Balikpapan



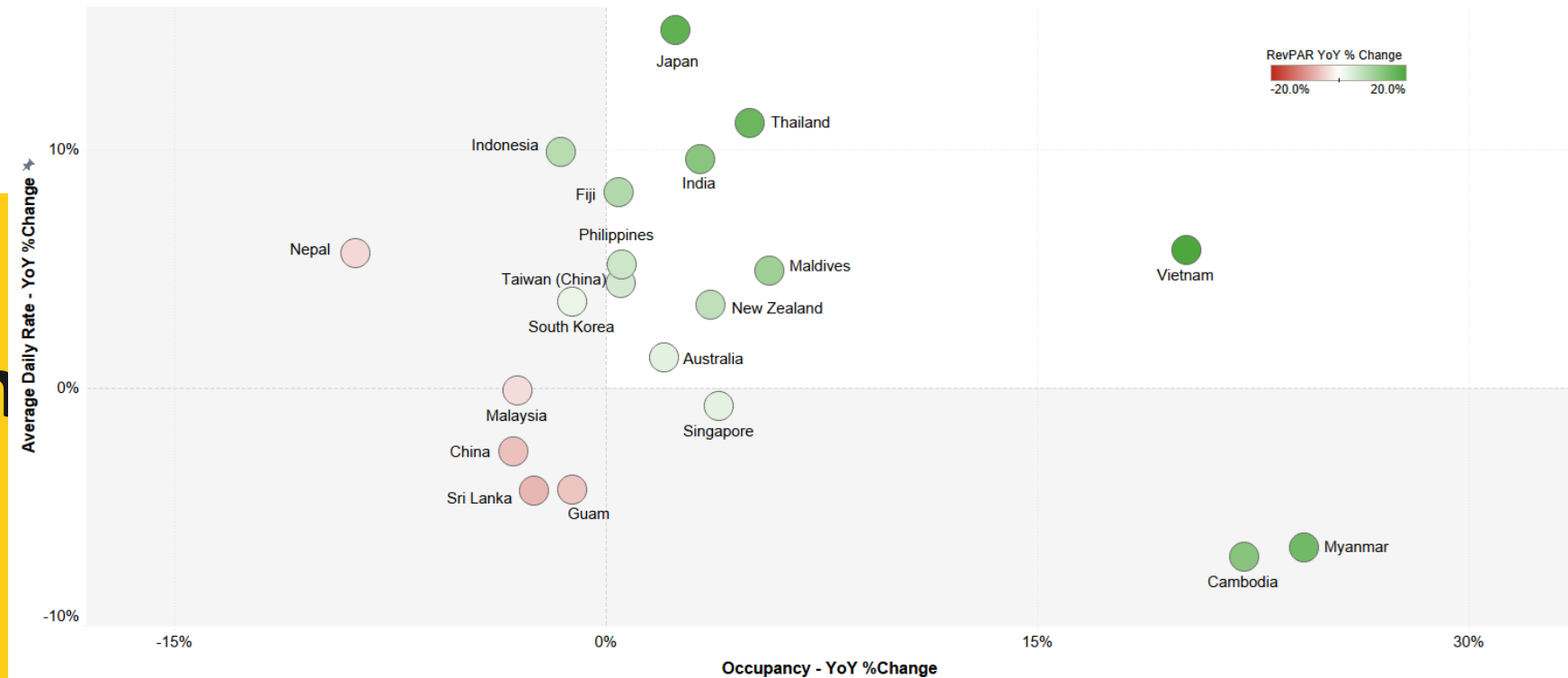
## Jayapura



# What's Going on with Indonesia Hotels Now?

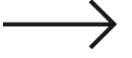
## RevPAR YoY % Change by Country

December 2024



Source: STR. © 2025 CoStar Group





# Government Business Slow Down

Room revenue numbers don't show the whole story of the impact, as there is significant MICE/Banqueting revenue associated with this segment that is not being generated.

From our internal numbers, what they say in the press is correct. Hotel revenue numbers are impacted 5%-30% by this (If alternative business sources are not found). Especially in the tertiary cities.



















# Thank you

# Terima kasih

# Matur Suksma

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HOTELS & RESORTS

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 swiss-belVILLAS  swiss-belSUITES  swiss-belBOUTIQUE  swiss-belINN  swiss-belCOURT  swiss-belEXPRESS  Zest<sup>plus</sup>  Zest  Zest<sup>OK</sup>



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