

INDONESIA

INTERNATIONAL MARKET UPDATE 2026

MARKET OVERVIEW

- Indonesia is South Australia's 15th largest inbound market and is ranked 10th for expenditure as of March 2026.
- Jakarta is the main source market of Indonesian travellers whilst Surabaya (Indonesia's second largest city) is a growing outbound market with the free independent traveller (FIT) segment seeing notable growth.
- Indonesia is currently a small market for South Australia, but the SATC is actively monitoring the opportunity and visits the market a few times a year.
- Consumer travel fairs remain a key booking avenue with attractive deals and value-added benefits from bank partners.
- There is a growing interest in major sporting and entertainment events. This includes both spectating at events such as the Australian Open or participating in events such as major marathons.
- The top three drivers that determine a destination Indonesians will travel to are: Nature (75%) Coastal (65%) and Culture (37%).
- 38% of visits are for the purpose of Holiday and 41% for Visiting Friends and Relatives (VFR).*
- 78% of Indonesian visitors to South Australia have been to Australia before.



FAST FACTS & FIGURES

Data is an annual average over 2 years ending March 2025-March 2026

INDONESIA	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	4,000	4,000	-	2,000	10,000
VISITS (AUS)	105,000	82,000	13,000	47,000	218,000
NIGHTS (SA)	222,000	46,000	2,000	354,000	623,000
NIGHTS (AUS)	3,825,000	2,137,000	187,000	4,121,000	10,270,000
ALOS - NIGHTS (SA)	59	11	4	156	63
ALOS - NIGHTS (AUS)	36	26	14	87	47
EXPENDITURE (SA)					\$50m

ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.
*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.
A HIGH AVERAGE DUE TO EDUCATION VISITORS.

SNAPSHOT OF CURRENT STATISTICS – MARCH 2026

VISITORS

 9k

NIGHTS

 550k

AVERAGE LENGTH OF STAY

 59 nights[#]

EXPENDITURE

 \$53m

AVERAGE SPEND

 \$96 per night \$5,680[#] per visitor

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

 #15 for visitors
#8 for nights
#10 for expenditure

AIR ACCESS

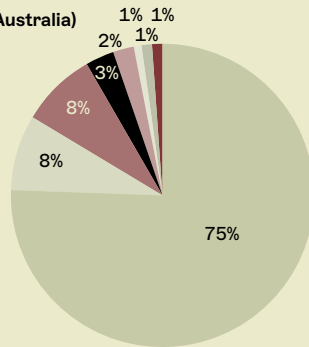
DIRECT AIRLINES

- Jetstar (JQ)
- Multiple airlines offer connections via other Australian airports.
- Singapore Airlines has a particularly strong standing, with many Indonesians (particularly those from Jakarta) happy to fly to Australia via Singapore.

VISITOR ACCOMMODATION TYPE AND TRAVEL PARTY DESCRIPTIONS*

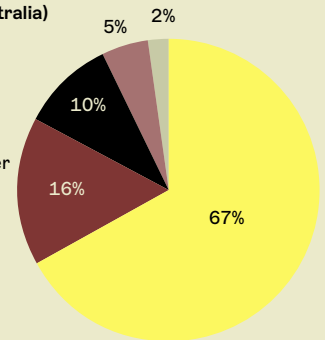
Visitor accommodation type (in South Australia)

- Rented house/apartment/flat/unit
- Friends or relatives' property
- Other commercial accommodation
- Hotels and similar accommodation
- Other accommodation
- Other private accommodation
- Caravan park or commercial camping ground
- Own property



Travel party description (to South Australia)

- Travelling alone
- Adult couple
- Family group - parents and children
- Friends or relatives travelling together
- Other travel party

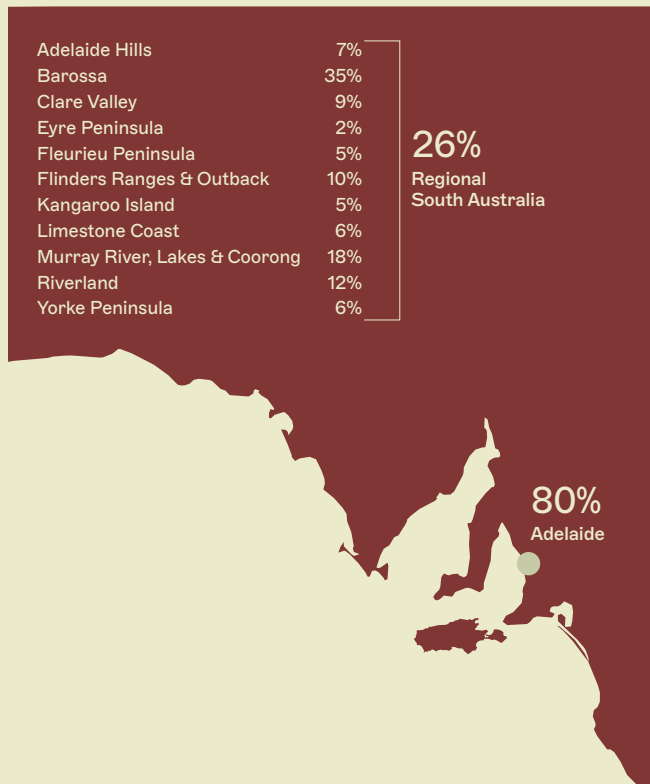


MARKET INSIGHTS

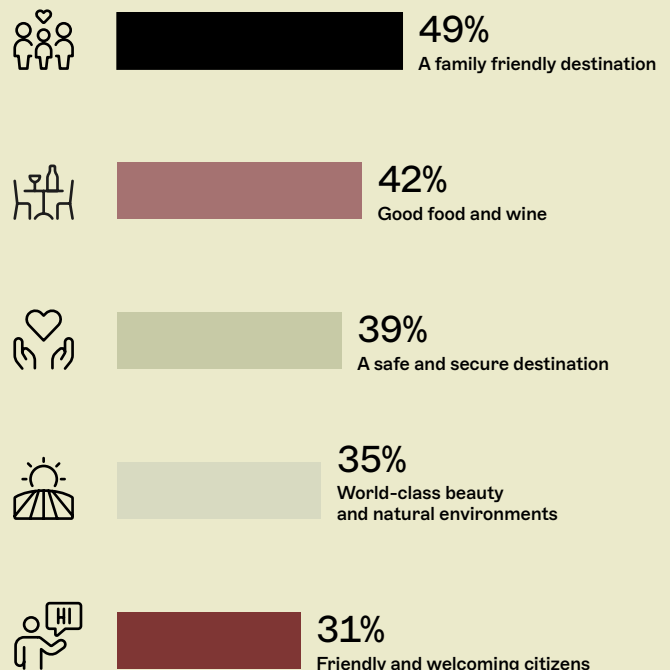
- Younger Indonesians are increasingly using online travel agents (OTAs) for accommodation, transport and experiences bookings.
- Indonesian travellers seek travel inspiration from social media (Instagram, TikTok & YouTube) with influencers shaping preferences.
- Booking window is typically 1-2 months prior for off-peak travel and up to 4 months for peak season travel.
- Pricing is a critical factor in travel decision-making among Indonesians – 46% prioritise cost above all else when booking accommodation.
- 68% of Indonesians prefer to pay with cash. However, other payment apps such as OVO and GoPay are very popular with 60% of Indonesians relying on these apps.
- Consumers will consider a new destination based on factors such as recommendations from family and friends (38%), travel promotions and discounts (34%) and articles highlighting cultural and iconic landmarks (41%).

- Peak travel months for Indonesians are March/April, June and December.
- Major travel fairs take place during January/February and July to September.
- Indonesia has the world's largest Muslim population with over 80% of Indonesians being Islamic. Indonesian travellers to Australia will cover a wide spectrum of expressions of Islam, whilst others will be non-Muslim.
- With this in mind, it is important to understand the importance of halal food, prayer facilities and culturally respectful services for some Indonesian travellers. Noting, this will not be required for all and, conversely, some Indonesians will be quite happy to undertake experiences like wine tasting whilst in South Australia. It is advisable to check this with the customer or the agent before arrival to ensure you are catering appropriately.

VISITOR DISPERSAL**



FACTORS FOR CHOOSING TO VISIT SOUTH AUSTRALIA*



TARGET MARKET PROFILE



The primary target market includes families with older children as well as couples and groups of friends seeking engaging and memorable travel experiences.

*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.
+DATA INCLUDES VISITORS WHO TRAVELLED TO MULTIPLE REGIONS FOR ALL PURPOSES.

BOOKING PREFERENCES



54%

Online Travel Agent
(eg. Expedia)



31%

Direct with Airline



36%

Retail Travel Agent/
Tour Operator



31%

Direct with
Accommodation



4%

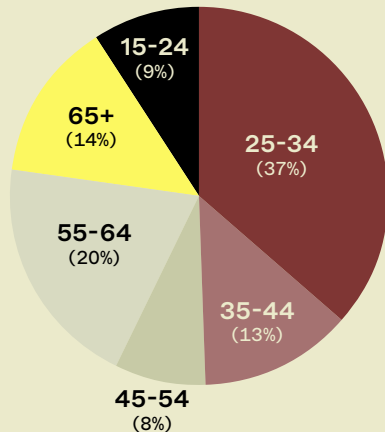
Direct with
Experience Provider



1%

Other

INDONESIAN VISITORS TO SOUTH AUSTRALIA BY AGE GROUP*



INDONESIA CHECKLIST

Consider the following points when targeting travellers from Indonesia:

- The SATC does not currently recommend operators plan independent sales visits to Indonesia at this point. If there is interest in visiting the market, please contact the SATC to see if there is a way we can work together for a coordinated approach.
- Instead, use existing events like Marketplace, Australian Tourism Exchange and other inbound events to develop contacts with the trade servicing the Indonesian market.
- Always be mindful and culturally sensitive when dealing with key trade partners, and don't be afraid to ask questions respectfully if unsure.
- Trust, reliability and good working relationships are important to build loyalty.
- Respond to their enquiries within a reasonable time frame before they decide to change to another destination.
- Keep your price list updated and share any video assets of your products for them to share on their social platforms.
- Offer deals occasionally especially for their consumer travel fair season so that they are able to make their South Australian packages more attractive.

Example: Book 3 nights, pay for 2 nights, kids stay and play for free, complimentary pass to an experience when you purchase a standard entry ticket.

KEY TRADE PARTNERS

KEY AGENTS

- Dwidaya Tour
- Golden Rama
- Celindo Tour
- Monas Tour
- Haryono Tours
- Yuk Travel
- Traveloka
- Panorama JTB Tours

INBOUND REPRESENTATIVE COMPANIES IN AUSTRALIA

- PTC Express Travel
- Xceptional Tours Australia
- Dream Tours & Incentives Management (DTIM)
- H2Oz Travel
- Turtle Down Under

TOP ONLINE TRAVEL AGENTS



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Government of South Australia

South Australian Tourism Commission

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