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Comparing Domestic and International Tourist Visits in Indonesia's Leading Destinations: Evidence from Bali

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ABSTRACT

This study analyzes the dynamics of domestic and international tourist visits to Bali, Indonesia, with a focus on the impact of the Covid-19 pandemic. It aims to: (1) describe the conditions of tourist arrivals, (2) examine differences in domestic and foreign visits from 2010 to 2020, (3) identify key constraints faced by tourists, and (4) assess the government's role in boosting visits. Using secondary data from Bali's Central Statistics Agency, the study applies both quantitative and qualitative analyses. Results show that Bali is heavily reliant on international tourists, as evidenced by the 82.96% decline in foreign arrivals in 2020. However, domestic tourists consistently made up more than 60% of visitors before the pandemic, highlighting their importance during crises. The study identifies challenges such as inadequate human resources, infrastructure, and regulatory misalignment. Strengthening the domestic market, improving governance, and enhancing infrastructure are crucial for a more resilient and sustainable tourism sector in Bali.

Kata Kunci :

Pariwisata, Wisatawan
Domestik, Wisatawan
Mancanegara,
Destinasi Unggulan,
Bali

ABSTRAK

Penelitian ini menganalisis dinamika kunjungan wisatawan domestik dan internasional ke Bali, Indonesia, dengan fokus pada dampak pandemi Covid-19. Tujuan penelitian ini adalah: (1) menggambarkan kondisi kedatangan wisatawan, (2) memeriksa perbedaan kunjungan domestik dan asing dari tahun 2010 hingga 2020, (3) mengidentifikasi kendala utama yang dihadapi wisatawan, dan (4) menilai peran pemerintah dalam meningkatkan kunjungan. Menggunakan data sekunder dari Badan Pusat Statistik Bali, penelitian ini menerapkan analisis kuantitatif dan kualitatif. Hasil penelitian menunjukkan bahwa Bali sangat bergantung pada wisatawan internasional, terbukti dengan penurunan kedatangan wisatawan asing sebesar 82,96% pada tahun 2020. Namun, wisatawan domestik secara konsisten menyumbang lebih dari 60% pengunjung sebelum pandemi, menunjukkan pentingnya pasar domestik selama krisis. Penelitian ini mengidentifikasi tantangan seperti sumber daya manusia yang kurang memadai, infrastruktur yang terbatas, dan ketidaksesuaian regulasi. Memperkuat pasar domestik, meningkatkan tata kelola, dan



meningkatkan infrastruktur sangat penting untuk sektor pariwisata Bali yang lebih tahan banting dan berkelanjutan.

Kata Kunci: pariwisata, wisatawan domestik, wisatawan mancanegara, destinasi unggulan, Bali

INTRODUCTION

Tourism is a key sector in Indonesia's economy, contributing to GDP, foreign exchange, and employment. Prior to the Covid-19 pandemic, global travel trends consistently rose due to easier transportation, advances in information technology, and changing lifestyles that made travel essential for recreation, business, and self-development (Revida et al., 2020). Indonesia, with its diverse natural, cultural, and social attractions, prioritizes tourism in national development.

However, the Covid-19 pandemic drastically altered the supply and demand dynamics in tourism. Classified as a natural disaster, it raised concerns about health and travel safety. Tourists became reluctant to travel, especially on long-haul flights. Health changes, travel policies, and quarantine regulations increased uncertainty, complicating tourism planning (Chen et al., 2015). Social distancing, border closures, and flight suspensions restricted global mobility, affecting tourist arrivals to Indonesia and outbound travel.

The pandemic also accelerated changes in consumer behavior. While price was previously a major factor in destination and accommodation choices, post-pandemic, safety, cleanliness, and healthcare facilities became primary determinants. The implementation of cleanliness, health, safety, and environmental sustainability (CHSE) standards has become a crucial strategy for rebuilding traveler confidence, especially among international tourists who prioritize destination safety and hygiene (Putra et al., 2023). Government policies providing CHSE certifications for tourism businesses have significantly helped mitigate the decline in visitor numbers.

Among Indonesia's various destinations, Bali holds a unique position as a long-established international hotspot. Bali offers a mix of natural, cultural, and spiritual attractions, supported by a well-developed tourism infrastructure (Heriawan, 2004; Muljadi, 2012). Data from the Bali Provincial Statistics Bureau shows a steady increase in foreign tourist visits from 2.57 million in 2010 to over 6.27 million in 2019, before sharply dropping to about 1.07 million in 2020. The previously positive growth rate turned into a drastic contraction, highlighting the destination's vulnerability to external shocks like the pandemic.

On the other hand, domestic tourists consistently dominated total visits to Bali. From 2010 to 2019, the number of domestic tourists was always higher than international tourists, with the percentage of foreign visitors ranging from 31.97% to 39.48% annually. In 2020, the proportion of foreign tourists dropped to 18.88% due to the pandemic. This indicates that while Bali is globally associated with international tourism, the domestic market plays a crucial role and serves as a vital support during crises.

Despite its status as a leading destination, tourism development in Indonesia faces numerous challenges. Studies highlight issues such as inadequate human resources, overlapping regulations, suboptimal infrastructure, and limited community involvement (Nugroho, 2020; Suryadana, 2015). Governance issues, including institutional challenges, intergovernmental



coordination, and the integration of national and local policies, also hinder the competitiveness of tourism destinations (Sunaryo, 2013).

Several studies have explored the role of government in tourism development, particularly as regulators, facilitators, motivators, and dynamic agents (Muis, 2016; Hakim et al., 2024; Sahid & Masse, 2024). Other studies have analyzed the impact of tourist arrivals, attractions, and hotels on regional income (Sari & Dewi, 2021), and domestic tourists' attitudes toward Indonesian destinations (Yusendra, 2016). However, research combining long-term quantitative analysis of domestic and international tourist visit patterns with qualitative analysis of constraints and government roles in leading destinations, particularly in the pandemic context, remains limited.

This study aims to address the following questions: What are the conditions and differences in domestic and international tourist visits to Indonesia's leading destinations? What challenges do tourists face, and what is the government's role in boosting tourist arrivals to these destinations? Theoretically, this research seeks to enrich sustainability tourism studies by emphasizing the role of the domestic market and destination resilience. Practically, the findings will provide insights for policymakers and industry players to design recovery strategies and strengthen Indonesia's leading destinations during and after crises.

LITERATURE REVIEW

Tourism

According to Law No. 10 of 2009 on Tourism, tourism refers to various tourist activities supported by facilities and services provided by the community, businesses, government, and local governments. This definition emphasizes that tourism is a system involving multiple stakeholders and is an integral part of national development (Ministry of Tourism, 2009). The World Tourism Organization (WTO) views tourism as the activities of people traveling and staying outside their usual environment for less than a year for leisure, business, or other purposes (Sinaga, 2010). Several experts also emphasize that tourism is a temporary journey from one's residence to another place for pleasure, experience, and the fulfillment of various non-productive purposes (Revida et al., 2020; Muljadi, 2012).

Yoeti (2017) categorizes tourism based on geographic location (local, regional, national, international), purpose of travel (business, vacation, education), time of visit (seasonal, incidental), and the objects visited (culture, nature, sports, religion). Spillane (2015) adds classifications based on the purpose of travel such as pleasure tourism, recreation tourism, cultural tourism, sport tourism, business tourism, and convention tourism. This variety indicates that tourism is not only related to recreational activities but also to economic, social, and cultural activities.

Tourists

Tourists are defined as individuals or groups visiting a location outside their usual residence temporarily, for at least 24 hours, without the intention of working or earning income at the destination (Suwanto, 2004; Kustini, 2015). Spillane (2015) states that tourists are temporary visitors whose travels can be categorized into various motives such as recreation, business, studies, religious purposes, or specific missions.



Based on the nature and scope of the travel, tourists can be categorized into several types: foreign tourists, domestic tourists, domestic foreign tourists, indigenous foreign tourists, transit tourists, and business tourists (Spillane, 2015). In this research, the main distinction is between domestic and international tourists, who each have different spending patterns, length of stay, and destination preferences.

Tourist Destinations and Leading Destinations

Law No. 10 of 2009 defines a tourist destination as a geographical area within one or more administrative regions that possesses tourist attractions, public facilities, tourism facilities, accessibility, and a community that interacts (Ministry of Tourism, 2009). Suryadana (2015) explains that a destination is an area that integrates attractions, facilities, communities, and accessibility into a complete system, collectively shaping the tourist experience.

Legawa (2008) and Sunaryo (2013) view a tourism destination as an entity that includes not only objects and attractions but also amenities, accessibility, supporting facilities, and institutions. Yoeti (2017) emphasizes three key components for the success of a destination: attraction, accessibility, and amenities. Attraction includes both natural and cultural attractions; accessibility relates to transportation ease; and amenities refer to accommodations, restaurants, and other supporting facilities.

Leading tourist destinations are defined as tourist attractions with high competitiveness, capable of competing in both national and international markets. Scott and Lodge (1985) define national competitiveness as a country's ability to create, produce, and distribute products in international trade while enhancing the return on its resources. In tourism, a leading destination must be able to attract tourists sustainably while maintaining the quality of the environment and local culture.

Previous Studies

Several previous studies provide an important foundation for this study. Sambode et al. (2019) studied the role of local government in promoting tourism in Tanjung Bongo and found that successful promotion relies heavily on consistent planning and execution strategies. Ihlan (2022) highlighted the role of the Tourism Office in developing tourism potential from an Islamic economic perspective, finding that infrastructure limitations were a major obstacle.

Muis (2016) examined the role of the Tourism Office in ecotourism development in Penajam Paser Utara and found that roles as motivators, facilitators, and dynamic agents were operational, though still facing resource limitations. Hakim et al. (2024) discussed the government's role in sustainable tourism programs in the Lake Toba area in relation to the achievement of the Sustainable Development Goals (SDGs), while Surya (2017) reviewed the role of local government in developing Tanjung Pallette's tourism area, emphasizing the importance of policy support and community participation.

From a regional economic perspective, Sari and Dewi (2021) showed that the number of tourist visits, tourist attractions, and hotels significantly affected regional income in Bali. Yusendra (2016) measured domestic tourists' attitudes towards several tourist destinations in Indonesia using the Ideal Point Model, finding Bali ranked first in tourist attitude interpretation. Nugroho (2020)



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analyzed the contribution of tourism to Indonesia's economy and identified issues such as overlapping regulations, low human resources quality, inadequate publicity, and infrastructure issues.

Conceptual Framework

This research framework places Bali as a representation of Indonesia's leading tourist destination, highly dependent on international tourists. On one hand, the international market generates foreign exchange and strengthens the global image of the destination. On the other hand, this dependency increases vulnerability during global crises, such as the Covid-19 pandemic.

The number of domestic and international tourist visits is positioned as an indicator of destination performance. Factors such as human resources quality, regulations, infrastructure, and the roles of central and local governments are seen as explanatory variables influencing tourist visit dynamics. The domestic market is assumed to serve as a buffer that enhances destination resilience, while appropriate government policies can mitigate the negative impacts of dependency on the foreign market.

RESEARCH METHODOLOGY

This study employs a descriptive quantitative approach combined with qualitative analysis. The data used are secondary data obtained from official publications by the Central Statistics Agency (BPS) of Bali Province regarding the number of domestic and international tourist visits to Bali from 2010 to 2020.

Data collection utilizes the documentation technique, which involves gathering data from written documents and relevant official sources. The main reference site is the BPS Bali regional statistics portal (<https://bali.bps.go.id>), which contains annual data on the number of domestic and foreign tourist visits.

Quantitative analysis is performed using descriptive statistics to calculate and interpret total visits, the percentage of foreign tourists relative to total visits, and the annual growth rate of foreign tourists. This aims to describe the dynamics and long-term trends, including the impact of the Covid-19 pandemic in 2020.

Furthermore, qualitative analysis is carried out through a literature review of previous studies related to tourism development challenges and the role of the government in strengthening leading destinations. This approach enables the researcher to link statistical findings with the context of governance, policies, and the structural conditions of the tourism sector in Indonesia.

RESULTS AND DISCUSSION

Conditions of Domestic and International Tourist Visits in Bali

One of Indonesia's leading tourism destinations is the island of Bali. The following table shows the development of foreign tourist arrivals on the island.

Table 1. Total Number and Growth of Foreign Tourists 2010-2020

Tahun	Total	Pertumbuhan (%)
2010	2 576 142	8.01



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2011	2 826 709	9.73
2012	2 949 332	4.34
2013	3 278 598	11.16
2014	3 766 638	14.89
2015	4 001 835	6.24
2016	4 927 937	23.14
2017	5 697 739	15.62
2018	6 070 473	6.54
2019	6 275 210	3.37
2020	1 069 473	-82.96

Source: Bali Province Central Statistics Agency (BPS) 2021, Processed

Table 4.1 in the BPS data shows the total number and growth of foreign tourists to Bali from 2010 to 2020. In general, the period from 2010 to 2019 shows a relatively stable upward trend in visits. In 2010, there were 2,576,142 foreign tourists with a growth rate of 8.01 percent. This number continued to rise, reaching 6,275,210 tourists in 2019, with a still positive growth rate of 3.37 percent.

This trend reflects two main points. First, Bali successfully maintained its reputation as an international tourist destination, with strong natural and cultural attractions, making it a primary destination for foreign visitors when traveling to Indonesia (Yusendra, 2016; Zein & Zulfiana, 2018). Second, the increase in foreign tourist numbers indicates the success of promotion efforts and the development of supporting facilities in Bali prior to the pandemic.

However, in 2020, there was a drastic decline, with the number of foreign tourists dropping to 1,069,473, a negative growth of 82.96 percent. This decline aligns with international travel restrictions, border closures, and social distancing measures implemented by many countries to curb the spread of Covid-19. This data highlights the significant impact of the pandemic on destinations heavily reliant on global mobility.

Differences between Domestic and International Tourist Visits

The difference in the number of domestic and foreign tourist visits to Indonesia's leading destination, namely Bali Island.

Table 2. Number of Domestic and Foreign Tourists, 2010–2020

Tahun	Asing	Domestik	Jumlah	% Asing
2010	2,576,142	4,646,343	7,222,485	35.67
2011	2,826,709	5,675,121	8,501,830	33.25
2012	2,949,332	6,063,558	9,012,890	32.72
2013	3,278,598	6,976,536	10,255,134	31.97
2014	3,766,638	6,394,307	10,160,945	37.07
2015	4,001,835	7,147,100	11,148,935	35.89
2016	4,927,937	8,643,680	13,571,617	36.31
2017	5,697,739	8,735,633	14,433,372	39.48



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2018	6,070,473	9,757,991	15,828,464	38.35
2019	6,275,210	10,545,039	16,820,249	37.31
2020	1,069,473	4,596,157	5,665,630	18.88

Source: Bali Province Central Statistics Agency (BPS) 2021, Processed

Table 4.2 presents a comparison of domestic and foreign tourist numbers to Bali from 2010 to 2020. Consistently, domestic tourists outnumber foreign tourists. For example, in 2010, there were 4,646,343 domestic tourists and 2,576,142 foreign tourists, bringing the total visits to 7,222,485, with foreign tourists accounting for 35.67 percent.

From 2011 to 2019, the percentage of foreign tourists in total visits ranged from 31.97 to 39.48 percent. This means that more than 60 percent of the visits each year came from domestic tourists. In 2019, before the pandemic, total visits reached 16,820,249, consisting of 6,275,210 foreign tourists and 10,545,039 domestic tourists.

In 2020, the number of foreign tourists dropped to 1,069,473, while domestic tourists reached 4,596,157. The proportion of foreign tourists to total visits sharply decreased to 18.88 percent. Although the number of domestic tourists also declined due to mobility restrictions and health concerns, the decline was not as severe as that of foreign tourists.

This difference indicates that the domestic market has a higher level of resilience compared to the international market. Domestic tourists tend to return to travel more quickly when restrictions begin to ease, particularly to destinations considered relatively safe and accessible. This reinforces the argument that strengthening the domestic market is a strategic measure for maintaining the sustainability of leading destinations during global shocks.

Constraints Faced by Tourists and the Tourism Sector

Based on a synthesis of previous research, there are at least four main groups of challenges faced by leading destinations in Indonesia.

First, the quality of human resources (HR) in tourism is still suboptimal. Nugroho (2020), Sugiarto and Mahagangga (2020), and Hartiningsih (2019) found that the competence of HR in developing tourist attractions and providing quality services remains limited. A lack of training, tourism education, and professionalism impacts the tourist experience and decreases the competitiveness of destinations.

Second, regulations and policies are not fully aligned between the central and local governments. Various studies highlight the presence of overlapping regulations and weak coordination, hindering the planned and sustainable development of tourism (Nugroho, 2020; Hakim et al., 2024). Regulatory misalignment creates uncertainty for business operators and reduces the effectiveness of promotional and destination management policies.

Third, infrastructure and facilities are inadequate. This challenge includes the quality of accessibility to destinations, road conditions, public facilities, and supporting amenities such as accommodation and tourist information services. Studies by Melli et al. (2018) and Sugiarto & Mahagangga (2020) indicate that infrastructure limitations and governance issues are key barriers to destination development, especially in areas with challenging geographical conditions.



Fourth, community and environmental aspects related to social support, culture, and environmental sustainability. Nugroho (2020) and Mellu et al. (2018) emphasize that environmental concerns often receive less attention, while community participation in destination management remains limited. However, the preservation of culture and the environment is crucial for the sustainability of tourism. Without local community awareness and strong institutional support, tourism development risks damaging the resources that are the main attractions of the destination.

These challenges are also reflected in the tourist experience, especially regarding service quality, accessibility, and destination information. In the case of Bali, although infrastructure is relatively more advanced compared to many other destinations, pressure on the environment, traffic congestion, and strain on public facilities indicate the need for more integrated and sustainability-oriented management (Heriawan, 2004; Sunaryo, 2013).

Government Roles in Increasing Tourist Visits

The role of the government in tourism development can be seen through various functions, including as a regulator, facilitator, motivator, and dynamizer (Muis, 2016; Sahid & Masse, 2024). A review of the literature shows that the government's role in increasing tourism visits presents two contradictory sides.

On one hand, there are many examples of successful government involvement. Muis (2016) found that the Tourism Office plays a key role in optimizing local advantages, promoting community empowerment, and collaborating with the private sector in ecotourism development. Sahid and Masse (2024) show that the government's role as a regulator can balance the interests of tourists with the preservation of tourist attractions, while as a facilitator, the government provides the necessary infrastructure and supporting facilities for destinations. The government also acts as a motivator and dynamizer through socialization, training, and support for tourism stakeholders.

On the other hand, several studies highlight that the role of local governments remains suboptimal. Januardi (2019), Sambode et al. (2019), and Ihlan (2022) found that tourism development efforts in some regions have not been fully realized, especially in terms of promotion, infrastructure development, and support for community-owned tourist attractions. Budget limitations, institutional capacity, and inter-agency coordination are frequent challenges.

In the context of leading destinations such as Bali, both the central and local governments have undertaken various initiatives, ranging from strengthening branding, infrastructure development, to the provision of post-pandemic incentive policies and CHSE certification (Putra et al., 2023). However, the high reliance on foreign tourists indicates that previous development strategies were more focused on the international market. The pandemic has taught that strengthening the domestic market and diversifying tourism products are crucial.

Optimizing the role of the Tourism Office should not only focus on enhancing promotion but also on developing tourism products that are relevant to the domestic market, improving local human resource quality, and strengthening coordination with business operators and communities. Thus, policies that support market diversification and sustainability can help leading destinations like Bali become more resilient to future shocks.



CONCLUSION

This study analyzes the comparison of domestic and international tourist visits to leading destinations in Indonesia, focusing on Bali, and examines the challenges and role of the government in tourism development. Based on the analysis results, several conclusions can be drawn as follows:

First, Bali, as a leading tourist destination, shows significant dependence on international tourists. This is evident from the drastic decline in foreign tourist visits in 2020, which saw a negative growth of 82.96% due to the Covid-19 pandemic. This dependency creates economic vulnerability for the local community and businesses that rely on foreign tourist revenue.

Second, although Bali is globally associated with foreign tourists, data shows that domestic tourists consistently dominated total visits from 2010 to 2019, contributing more than 60% of total visits each year. In 2020, when foreign tourist visits plummeted, domestic tourists still accounted for over 80% of total visits. This emphasizes the strategic role of the domestic market as a buffer during global crises, and it should be positioned as a key pillar in the sustainability strategy of the destination.

Third, the development of leading destinations in Indonesia still faces several key challenges, including inadequate human resources in tourism, misalignment between central and local government regulations, limited infrastructure and facilities, and suboptimal community involvement. These challenges can reduce the tourist experience, hinder innovation in tourism products, and diminish the competitiveness of destinations on a global scale.

Fourth, the role of the government in increasing tourist visits shows mixed results. The central government and Tourism Offices in several regions have carried out functions as regulators, facilitators, motivators, and dynamizers, including the development of sustainable tourism programs and the provision of infrastructure. However, in many regions, the role of local governments in promotion, destination development, and program coordination remains suboptimal, so the potential of leading destinations has not been fully exploited.

Based on these findings, several policy implications can be proposed. First, tourism development strategies need to focus more on strengthening the domestic market through targeted promotion, the development of tourism products relevant to local tourists, and the adjustment of pricing and travel packages to make them more affordable. Second, harmonizing regulations between central and local governments is necessary to create a policy framework that supports the sustainable development of leading destinations. Third, improving the quality of tourism human resources through training, education, and certification should be a priority to enhance service quality and tourist experiences.

Fourth, investment in infrastructure and supporting tourism facilities should continue to increase, with attention to environmental sustainability and local cultural aspects. Fifth, community participation in destination management must be strengthened through empowerment, education, and the development of local institutions so that the economic benefits of tourism are more evenly distributed. Thus, leading destinations in Indonesia, such as Bali, can build a more resilient, inclusive, and sustainable tourism system in the future.



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