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### POST-COVID-19 TOURISM SECTOR POLICY RECOMMENDATIONS FOR SHORT, MEDIUM, AND LONG-TERM PLANNING

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#### Abstract

*Tourism is one of the sectors most affected by the COVID-19 pandemic. This pandemic has prompted governments worldwide to implement policies to limit community activities within and between countries. The tourism sector has been significantly affected, especially regarding income reduction, due to the cessation of supporting factors such as providing accommodation, food, and beverages, retail and wholesale trade, car and motorcycle repairs, and transportation and warehousing. Before the emergence of the COVID-19 pandemic, the focus of 5-year tourism development in Indonesia was on strengthening priority tourism destinations and revitalizing Bali destinations. The COVID-19 pandemic that began in March 2020 has changed the 5-year tourism sector projection, followed by various policies to prevent the spread of this virus and focus on public health. This study aims to present a portrait of Indonesian tourism at the beginning of the COVID-19 pandemic and provide recommendations for recovering economic policy adaptations, both short-term and medium- and long-term. The method used is a literature review with a qualitative and descriptive approach to existing policies. The results of the analysis recommend that the assessment of tourism development planning be emphasized on general stimulus, stimulus for Small, micro, and Medium Enterprises (MSMEs), structuring accommodation packages, transportation and access, taxation stimulus, technical guidance, strengthening tourism diversification, and strengthening the supply and demand side of the tourism sector.*

**Keywords:** *Tourism; Covid-19; Policy; Recovery; Economic Stimulus.*

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### Abstrak

Pariwisata adalah salah satu sektor yang paling terdampak dengan adanya pandemi COVID-19. Pandemi ini mendorong berbagai pemerintahan di dunia menerapkan kebijakan pembatasan aktivitas masyarakat, baik di dalam negeri maupun antarnegara. Sektor pariwisata adalah salah satu yang terdampak cukup signifikan, khususnya pada pengurangan pendapatan karena berhentinya faktor penunjangnya penyediaan akomodasi dan makanan-minuman; perdagangan eceran dan besar; reparasi mobil dan motor; serta transportasi dan pergudangan. Sebelum munculnya pandemi COVID-19, fokus pembangunan pariwisata 5 tahunan di Indonesia diutamakan untuk penguatan destinasi pariwisata prioritas dan revitalisasi destinasi Bali. Pandemi COVID-19 yang berawal dari Maret 2020 telah merubah proyeksi sektor pariwisata 5 tahunan tersebut yang ditindaklanjuti dengan berbagai kebijakan untuk mencegah penyebaran virus ini dan fokus pada kesehatan masyarakat. Penelitian ini bertujuan untuk menyajikan potret pariwisata Indonesia saat awal pandemi COVID-19 dan memberikan rekomendasi *recovery* adaptasi kebijakan ekonomi, baik jangka pendek, maupun jangka menengah dan panjang. Metode yang digunakan adalah *literature review*, dengan pendekatan deskriptif kualitatif terhadap kebijakan yang ada. Hasil analisis merekomendasikan bahwa kaji ulang perencanaan pembangunan pariwisata ditekankan pada stimulus umum, stimulus Usaha Kecil Mikro dan Menengah (UMKM), penataan paket akomodasi, transportasi dan akses, stimulus perpajakan, bimbingan teknis, penguatan diversifikasi wisata, serta penguatan sisi *supply* dan *demand* sektor pariwisata.

**Kata Kunci:** Pariwisata, Covid-19; Kebijakan; *Recovery*; Stimulus Ekonomi

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## INTRODUCTION

In the National Medium-Term Development Plan (NMDP) 2020-2024, Indonesia has predicted that the risk of "uncertainty" will still have a significant effect on the development of the Indonesian and world economies (GoI, 2020). Based on the IMF's World Economic Outlook Database data released in October 2019, world trade and economic growth are expected to stagnate, characterized by a slowing trend, with projections of 3.5 and 3.7 percent per year throughout 2020–2024. In early 2020, the world faced a COVID-19 pandemic that profoundly affected almost all aspects of human life. The COVID-19 pandemic has expanded and spread globally

to no fewer than 218 countries, including Indonesia. Based on this, the International Monetary Fund (IMF) changed its projection of world economic growth in June 2020 to grow by a minus or negative 4.9 percent (contraction) in 2020. This figure is 1.9 percent lower than the projection in April 2020, which predicted global Gross Domestic Product (GDP) growth to contract by around 3 percent.

Before the COVID-19 Pandemic, the NMDP 2020–2024 stated that Indonesia's economic development would be carried out with two main approaches: Economic resource management and increasing economic added value (GoI,

2020; Pambudi et al., 2020). These approaches are the cornerstone of cross-sector and cross-regional development synergies. With the integration of the food and agriculture sector, maritime sector, processing industry sector, fisheries and marine sector, tourism sector, creative economy sector, and digital economy sector in the tourism sector, the concept of this approach has changed drastically. The pandemic forced the state to impose social restrictions and prohibit tourist visits between regions and from abroad. The number of foreign tourist visits fell by 59.96 percent during January–June 2020 compared to the same period in 2019. The Central Statistics Agency (BPS) records that international tourist visits have only reached 3.09 million.

The COVID-19 pandemic has impacted the mobility of people worldwide, including Indonesia. Social restrictions and lockdowns in April and May 2020 caused a decline in community mobility. Since mid-May, some countries have relaxed, and community mobility has increased, although it has not returned to normal (Pambudi & Putri, 2022).

The COVID-19 pandemic has not only hit the tourism sector in Indonesia but also on a global scale, wherein in various parts of the world, there has been a sharp decline in the aviation, hospitality, land, and sea transportation services businesses

(CEIC, 2020). At the beginning of the COVID-19 pandemic, the tourism industry experienced a significant global impact. Many countries implement travel restrictions, lockdowns, and strict health protocols to limit the spread of the virus (Uur & Akbiyik, 2020; Becker, 2020). Here are some of the developments in world tourism at the start of the COVID-19 pandemic:

Along with border closures and international travel cancellations, the number of global travelers experienced a drastic decline. Many international flights were canceled, hotels and tourist attractions closed, and the tourism industry overall suffered. Countries that depend on tourism as a significant source of income are experiencing severe economic impacts. Tourism is one of the main sectors contributing to GDP and employment in many countries. With the decline in tourism, countries such as Italy, France, Spain, and Thailand have suffered significant economic losses. Many countries are implementing travel restrictions such as border closures, mandatory quarantine, and COVID-19 tests to enter certain countries. Health protocols such as mask usage, social distancing, and increased hygiene are also implemented in tourism.

The pandemic has changed travel trends. Travelers tend to avoid crowded

destinations and opt for natural or remote destinations. In addition, domestic travel is becoming more popular as international travel is limited. Many people have started to explore local destinations and support local tourism to help with economic recovery at the local level. Awareness about sustainable tourism is also increasing, with a focus on preserving nature and culture and minimizing negative impacts.

The NMDP 2020–2024 document underlines the need for sustainable tourism development by considering environmental, social, and cultural aspects. Efforts will be made to minimize negative impacts on the environment, preserve cultural and historical heritage, and improve the quality of life of local communities (GoI, 2020). The pandemic is driving innovation in the tourism industry (Sheresheva et al., 2021). Many tourist attractions and service providers are adapting by providing virtual experiences or online tours. In addition, the application of technologies such as contact tracing applications and digital payments has also increased. The development of world tourism during the beginning of the COVID-19 pandemic was very dynamic and continues to change along with the global situation development.

In Indonesia, the evident impact is that workers in the tourism sector experienced a decrease in income,

especially those related to accommodation and food and beverage providers, wholesale and retail trade, car and motorcycle repair, and warehousing and transportation (BPS, 2020a). In February 2020, the number of unemployed people in Indonesia at the onset of the COVID-19 pandemic was 6.88 million, with an Open Unemployment Rate of 4.99 percent (BPS, 2020a). In regions that rely on tourism as their primary income, a sense of pessimism about the future of the tourism sector has begun to emerge, especially for areas that are highly dependent on or interested in developing tourism, given the uncertainty of when the COVID-19 pandemic will end. Sambodo (2020) stated that the COVID-19 pandemic in the tourism sector at least affects economic risk concerning 1) Temporary Closure of Hotels, Restaurants, and other tourism industries, 2) Employee Reduction: Unpaid Leave or Termination of Employment (PHK), 3) Liquidity Difficulties: Default on Investment and Working Capital Loans, and 4) Permanent Business Closure.

Some research has been done on international tourism policy, but few on how the country's economic policy adaptation can affect tourism (Kim et al., 2016). Reviewing economic development planning does not mean changing the entire plan but adding some according to current conditions more flexibly (Lew, 2014).

This study aims to analyze the portrait of Indonesian tourism during the COVID-19 Pandemic and provide recommendations for the recovery of economic policy adaptations, both in the short term (a year after the pandemic ends) and in the medium and long term. This research will be useful for development planning and budgeting because it can be an input for the government to provide a priority scale of priority tourism policy adaptation according to current conditions based on literature studies.

## **THEORITICAL FRAMEWORK**

### **Tourism Economics and Development Theory**

Economic growth is an increase in the standard of living over time for most families in a country. A growing economy can stem from rising incomes that allow people to consume more and diversify (Mankiw, 2009). However, progress and successful development are not the only indicators of successful development (Todaro & Smith, 2006). In an economy, there are various indicators to assess economic sustainability performance, one of which is the Gross Domestic Product (GDP) approach. Meanwhile, GDP itself is the market value of all final goods and services that have been produced by a country in a certain period (Mankiw, 2006). At the regional

level, the total value added of goods and services produced from all regional economic activities in a certain period is measured using the Gross Regional Domestic Product (GRDP). An increase in value added from an input (raw material) to an output (product) indicates the development of a region's economy.

Indonesian Law Number 10 of 2009 concerning Tourism defines tourism as a variety of tourist activities supported by various facilities and services provided by the community, entrepreneurs, and central and local governments. According to Mathieson & Wall (1982), tourism demand is the number of people who travel or want to travel away from their location of work and residence to be able to use tourist facilities and services. Tourism activities cannot be separated from international trade because they are related to goods or services exchanges between one country and another (Todaro & Smith, 2006). Trade occurs when one party gains or benefits, but the other party does not feel disadvantaged. All these activities are carried out to adjust the interaction between tourists and the tourism industry to meet their tourism needs. The description of this interaction is the demand and supply interaction in tourism. From the demand side, UNWTO defines tourism into 3 (three) groups, namely: 1) inbound tourism, 2) domestic tourism, and

3) outbound tourism. The implementation of tourism will generate foreign exchange, namely the total consumption expenditure made by or on behalf of tourists on their tour. Some components of demand in tourism include the number of tourist visits (inbound and domestic), the spending or consumption of tourists (inbound, outbound, and domestic), and the length of their stay. These components are the usage of goods and services directly or indirectly related to tourism and generate state revenue (foreign exchange).

When viewed from the supply side, Tourism is the business of providing goods or services to meet tourism needs or organizing a tour. The regulation of the tourism law outlines that there are 13 types of tourism businesses, namely: 1) tourism area business, 2) tourism attraction business, 3) tourism travel business (travel agency and travel agent), 4) tourism transportation service business, 5) food and beverage service business, 6) entertainment and recreation activity organizing business, 7) accommodation provider business, 8) meeting organizing business, 9) information service business, 10) tourism consulting service business, 11) water tourism business, 12) tour guide service business, and 13) spa business. This supply component makes the attraction to travel, both natural and artificial, as well as the goods and services offered to meet the

needs of tourists.

### **Economic Stimulus Theory: Government Intervention**

Adam Smith's classical economics explains that minimal intervention in the state economy allows businesses to develop quickly. In the concept of trade, an "invisible hand" makes the economy naturally return to equilibrium (Smith, 1776). However, this classical thinking is still limited and has not analyzed the imbalances due to non-ideal economic realities, such as a sudden drop in demand. During the Great Depression, government intervention was allowed when there were imperfections in the free market (Keynes, 2018). In addition, government intervention is also needed more strongly because market competition can only occur if the government guarantees it. So, government involvement is to reconcile or harmonize the goals of the public with the market goals.

Economic theory divides economic stimulus into two categories, namely, fiscal and monetary policy stimulus (Setiawan, 2018). Fiscal policy is used by the government through justification on the revenue and expenditure side of the government to manage the economy better (Mankiw, 2013). Fiscal policy can be divided into two main instruments: functional finance and budget management. Functional finance policy instruments are

carried out to control government spending from various kinds of indirect impacts on a country's national income. In addition, this instrument also aims to increase employment opportunities for the community. A budget management approach with policy instruments drives to regulate the course of the government budget through debt and taxation.

A fiscal policy affects the economy due to increased government expenditure or tax cuts. This economic activity has a multiplier effect by stimulating additional demand for household consumption goods (Keynes, 2018). Tax cuts can increase disposable income, increasing people's purchasing power. The magnitude of the multiplier effect of increased government spending and tax cuts depends on the extent of the marginal propensity to consume, which is transitory or permanent. Meanwhile, monetary policy is a policy where a country's monetary authority controls the money supply and targets interest rates to promote economic growth and stability. The main objectives of monetary policy include price stability, exchange rate and interest rate stability, full employment, improved per capita income, and financial market openness (Mishkin, 2010).

## **METHOD**

Research on recommendations for

short, medium, and long-term tourism sector policy planning after COVID-19 was conducted in the form of a policy review based on secondary data in the form of development policies and reports related to Indonesian tourism published by BPS, Bappenas, the Ministry of Finance, related technical ministries, and international literary sources. A qualitative analysis to obtain an overview of tourism development and its problems during the COVID-19 pandemic. This method aims to map the types of issues and impacts on the tourism sector during the COVID-19 pandemic as a basis for providing recommendations for adaptation in short-, medium-, and long-term development planning. The recommendations provision is also based on economic, social, and environmental considerations as part of the sustainable development concept. Policy recommendations for the short term, 1 (one) year after the end of the pandemic, as well as the medium and long-term related to adaptation related to the economic recovery of the tourism sector, are considered to boost the three targets of employment, the number of tourists, and the amount of income as initially planned in the 2020–2024 National Medium-Term Development Plan.

## **RESULTS AND DISCUSSION**

**Tourism Development Policy in NMDP**

**2020-2024**

Asia-Pacific is the second most competitive region in the most competitive tourism-related regional areas after Europe and Eurasia (Calderwood & Soshkin, 2019; Surjaningsih et al., 2012). Asia-Pacific, including Indonesia, offers the best combination of culture and nature, having the highest regional performance for the culture source and business travel subindexes. Asia-Pacific is supported by the best air transportation in the world, especially in supporting infrastructure for tourism services.

The tourism sector contributes significantly to the Indonesian economy. In 2018, there were 15.81 million foreign tourist visits, with a growth rate of 12.58%, and the country could contribute a foreign exchange of USD 19.3 billion. The tourism sector's contribution can reduce pressure on the balance of payments in Indonesia, which recorded a deficit of USD 7.1 billion in 2018 and is projected to become Indonesia's highest foreign exchange contributor in the next 5 (five) years. In the same year, there were 303.4 million domestic tourist trips, with a growth rate of 12.37%, accompanied by total tourist spending of IDR291 Trillion, with a spending growth rate of 17.9% (Ministry of Tourism, 2019). In Indonesia's National Medium-Term Development Plan (NMDP) 2020–2024, the tourism sector is given

special attention as one of the strategic sectors for economic development and improving people's welfare. In the NMDP, several priority tourist destinations are determined that will receive special attention for infrastructure development and marketing. Some of these destinations include Lake Toba in North Sumatra, Borobudur in Central Java, Mandalika in NTB, Labuan Bajo in NTT, Likupang in North Sulawesi, and Wakatobi in Southeast Sulawesi. Before the pandemic, the focus of development was on supporting efforts to increase the strengthening of priority tourism destinations (DPP) and revitalizing Destination Bali. Current efforts are related to disaster management and reviewing national and regional planning for the tourism sector. The COVID-19 pandemic since March 2020 is likely to change the 5-year projection, considering that this sector is one of the most depressed in Indonesia and the world (Pambudi, 2021).

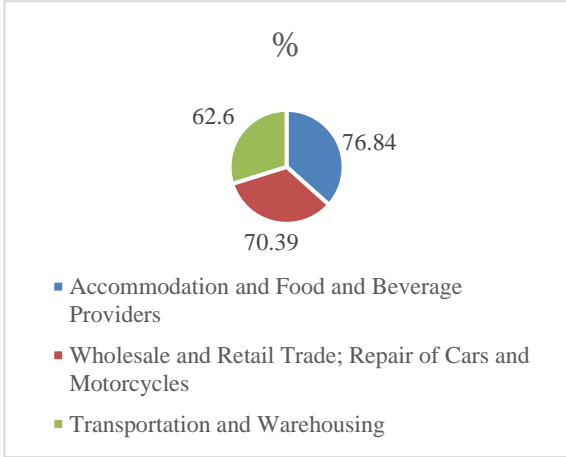


Figure 1. Share of the Tourism Sector in Indonesia Most Affected by COVID-19 (%)



Source: BPS, 2020b (processed)

In the 2019 Travel & Tourism Competitiveness Index of the 4 (four) assessment components, Indonesia has an advantage in the tourism policy and conditions component, which ranks 4th out of 140 countries, and the Natural and Cultural Resources component ranks 18th out of 140 countries (Calderwood & Soshkin, 2019). The tourism sector can provide 13.8 million jobs, equivalent to 1 in 9 jobs in Indonesia. In addition to providing employment impacts, tourism also creates indirect and induced effects on other industries, including micro, small, and Medium Enterprises (MSMEs). The high contribution and growth of the tourism sector make this sector a significant sector in stimulating economic growth, increasing foreign exchange earnings, encouraging other supporting industries, creating jobs, and promoting natural and cultural beauty in Indonesia.

The contribution of Tourism in Indonesia still rests with Bali Province, which accounts for 41% of total foreign tourist arrivals and is the 10th-ranked archipelago tourist destination province in Indonesia. To increase the contribution of the tourism sector to the national economy, the government in the NMDP 2020-2024 sets 10 Priority Tourism destinations, or "New Bali," which include Lake Toba and

its surroundings (North Sumatra), Borobudur Temple and its surroundings (Central Java), Lombok-Mandalika (West Nusa Tenggara), Labuan Bajo (East Nusa Tenggara), Manado-Likupang (North Sulawesi), Bromo-Tengger-Semeru (East Java), Raja Ampat (West Papua), Wakatobi (Southeast Sulawesi), Bangka Belitung, and Morotai (North Maluku). The development of the 10 Priority Tourism Destinations can open up opportunities for destination development that provide economic benefits to local communities on par with Bali.

Tourism development policies and strategies are focused on developing 10 Priority Tourism Destinations by carrying out the concept of quality tourism, as indicated by an increase in length of stay and tourist spending. This policy is supported by strengthening accessibility, attractions, amenities, and the quality of tourism human resources in the 10 DPPs as destinations that leverage tourism growth. Diversification of tourism types includes nature tourism, cultural tourism, and artificial tourism (Meeting-Incentive-Convention-Exhibition (MICE), wellness tourism, health tourism/medical tourism, and sports tourism). Throughout 2020–2024, six strategic project details are of concern in the development of the next 10 Priority Tourism Destinations, namely: 1) Pioneering Tourism destinations; 2) Road

improvements to support the 10 Priority Tourism Destinations; 3) Port and airport development; 4) Development of tourist villages and Village-Owned Enterprise facilities; 5) Development of tourism area amenities; and 6) Development within the region and area.

### Impact of the COVID-19 Pandemic

The COVID-19 pandemic began to enter Indonesia in early March and is still ongoing until August 24, 2020, reaching 155 thousand cases with 6,759 deaths. The increase in issues that still occur causes the government's main focus to be a recovery in health with policies to break the chain of the spread of COVID-19 through social distancing and working from home. The policy impacts the decline in transportation activities nationally and internationally and directly impacts the reduction of tourism activities in Indonesia.

During the first semester of 2020, the number of foreign tourist visits to Indonesia decreased by 59.7%, from 7.7 million people to 3.1 million people (YoY). On the other hand, national transportation activities have decreased by plane, train, and ship. Total national departures in the first semester of 2020 only accommodated 136 million passengers, whereas, in the same period in the previous year, they reached 256 million passengers (YoY).

The decline in foreign tourist

arrivals and national transportation travel impacted the accommodation supply subsector, where the star-rated hotel room occupancy rate in Indonesia was only 30% compared to the previous period, which reached 51%. Room Occupancy rates in star-rated hotels in 10 priority tourism destinations tend to decline from January to June 2020. The lowest occupancy level was recorded at 6.23% in April in West Nusa Tenggara province. All provinces experienced the lowest Room Occupancy Rates in April and May. The lowest level in April was recorded in Southeast Sulawesi, North Sulawesi, West Nusa Tenggara, Central Java, East Java, and North Sumatra. Meanwhile, the provinces of West Papua, North Maluku, East Nusa Tenggara, and Bangka Belitung experienced the lowest phase in May. Nevertheless, all regions recorded an increase in room occupancy rates in June due to the easing of Large-Scale Social Restrictions carried out by each local government, which began to push back the rise in room occupancy rates in 10 provinces.

Table 1. Room Occupancy Rate of Starred Hotels (%)

Province	2020					
	Jan	Feb	Mar	Apr	May	Jun
West Papua	50.	57.	45.	12.	10.	14.
	40	41	75	17	73	53
North Maluku	56.	41.	24.	21.	9.7	17.
	74	15	96	40	7	02
Southeast Sulawesi	39.	54.	29.	10.	12.	19.
	18	32	39	48	76	07
North Sulawesi	59.	44.	33.	13.	19.	24.
	10	01	13	98	14	62
East Nusa	39.	38.	25.	13.	11.	19.

Province	2020					
	Jan	Feb	Mar	Apr	May	Jun
Tenggara	26	50	19	32	57	69
West Nusa Tenggara	38.	36.	19.	6.2	14.	18.
Tenggara	93	70	07	3	42	59
Central Java	41.	46.	28.	10.	10.	17.
	51	36	63	65	83	64
East Java	48.	52.	36.	15.	16.	22.
	69	65	81	82	06	87
Bangka	27.	30.	18.	16.	15.	20.
Belitung Islands	35	88	87	63	89	93
	48.	45.	29.	11.	13.	20.
North Sumatera	06	24	20	93	82	12

Source: BPS, 2020b (processed)

The regional economy, in this case, the 10 Priority Tourism Destinations, began to experience contraction or negative growth in Q2 2020 due to the impact of the COVID-19 Pandemic. Based on the 10 Priority Tourism Destinations, there were only 2 (two) provinces that grew positively, namely North Sumatra (0.05 percent) and North Maluku (0.46 percent). In contrast, the areas that experienced the highest contraction were in Bangka Belitung Islands Province (-6.51 percent), Central Java (-5.94 percent), and East Java (-5.04 percent).

In the tourism sector for each of the 10 Priority Tourism Destinations, which is indicated by GRDP growth in sectors related to the provision of accommodation and the provision of food and drink, in the first quarter of 2020, several regions experienced negative GRDP growth in the accommodation and food and drink sectors, namely East Nusa Tenggara (-7.81 percent)

and North Sulawesi (-17.28 percent). Then, in Q2 2020, the implementation of the Large-Scale Social Restrictions (PSBB) policy and the policy of temporarily closing airport access caused people both within the country and abroad to be unable to travel. Thus, in the second quarter of 2020, all Priority Tourism Destinations experienced negative growth, with the highest negative growth being in West Nusa Tenggara Province (-60.26 percent), North Sulawesi (-51.07 percent), and East Nusa Tenggara (-41.46 percent).

Table 2. Economic Conditions of the 10 Priority Tourism Destinations Before and During COVID-19

Province	Regional Economy and Tourism Conditions					
	GRDP Growth (YoY) (Percent)			Accommodation and Food and Beverage GRDP Growth (YoY)		
	Q IV 2019	Q I 2020	Q II 2020	Q IV 2019	Q I 2020	Q II 2020
West Papua	9.00	5.67	-1.59	10.61	8.90	-6.33
North Maluku	7.61	4.81	0.46	6.02	2.13	-30.32
Southeast Sulawesi	10.15	6.73	-1.19	23.53	5.88	-5.88
North Sulawesi	9.33	7.88	-2.02	0.83	-17.28	-51.07
East Nusa Tenggara	7.12	4.33	-1.90	1.01	-7.81	-41.46
West Nusa Tenggara	9.00	5.67	-1.59	47.96	23.61	-60.26
Central Java	7.79	2.61	-5.94	12.73	3.98	-19.51
East Java	6.96	4.22	-5.07	6.61	12.21	-17.37
Bangka Belitung Islands	6.05	3.00	-6.51	21.02	18.40	2.46
North Sumatera	8.53	7.86	0.05	9.70	9.07	-14.01

Source: CEIC, 2020 (diolah)

The decline in community economic activity will lead to a social crisis characterized by increased poverty and unemployment. Based on data published by BPS, several provinces with priority tourism destinations experienced different phenomena in the open unemployment rate and poverty rate before and during the COVID-19 pandemic. Most regions experienced a decrease in the unemployment rate but an increase in the poverty rate. It shows that the pandemic is not significant in reducing the workforce, but the income of people in the province has decreased to the point of being vulnerable to poverty. These provinces are North

Sulawesi, East Nusa Tenggara, West Nusa Tenggara, East Java, Bangka Belitung Islands, North Sumatra, and Southeast Sulawesi.

In contrast, two Priority Tourism Destinations experienced an increase in the open unemployment rate during the pandemic but whose poverty rates have decreased, namely North Maluku and West Papua Provinces. It suggests that the COVID-19 pandemic in these regions caused significant layoffs in both provinces. Central Java Province is the only province that experienced increased unemployment and poverty rates during the COVID-19 pandemic. This phenomenon is common during a recession, where a decline in the production of goods and services is associated with a decrease in employment and is found in the structure of the economy that is labor-intensive.

Table 3. Open Unemployment Rate and Poverty Rate of 10 Priority Tourism Destinations

Province	Open Unemployment Rate (%)		Poverty Rate (%)	
	Before Covid-19 September 2019	Covid-19 period March 2020	Before Covid-19 September 2019	Covid-19 period March 2020
West Papua	5.28	6.20	21.51	21.37
North Maluku	4.26	4.97	6.91	6.78
Southeast Sulawesi	3.59	3.17	11.04	11.00
North Sulawesi	6.25	5.57	7.51	7.62
East Nusa Tenggara	3.10	2.80	20.62	20.90
West Nusa Tenggara	3.42	3.14	13.88	13.97
Central Java	4.22	4.25	10.58	11.41
East Java	3.92	3.69	10.20	11.09

Province	Open Unemployment Rate (%)		Poverty Rate (%)		
	Before Covid-19 September 2019	Covid-19 period March 2020	Before Covid-19 September 2019	Covid-19 period March 2020	
Bangka Islands	Belitung	3.62 Aug	3.41	4.50	4.53
North Sumatera		5.41 Feb	4.73	8.63	8.75

Source: BPS, 2020b (processed)

The COVID-19 virus that has attacked Indonesia since 2020 has had a significant impact. One of them is for MSME businesses that must go out of business. In 2020, around 30 million MSMEs in Indonesia went bankrupt due to this pandemic virus (BPS, 2020b). In 2019, there were 64.7 million MSMEs in Indonesia. After the COVID-19 pandemic, the number of MSMEs in Indonesia reached 34 million in 2020. It also impacts on the workforce, which had to lose their jobs. In that year, there were around 7 million informal MSME workers who had to be dismissed. The most bankrupt MSME sector is the tourism sector. The COVID-19 pandemic made the government issue a social restriction policy. When PSBB began, many restaurants were paralyzed. The MSME sector is crucial for economic recovery. In 2019, the MSME sector contributed 60% to the Gross Domestic Product (GDP), and last year, it was not significant because many were depressed.

### **Government Policies Related to Tourism during the Covid-19 Pandemic**

In March 2020, the government issued several economic stimulus policies to create stability in several sectors of the country's economy during the COVID-19 pandemic (Pambudi, 2023). Some of the policies provided in the tourism sector are policies to increase tourist arrivals through the provision of incentive packages for airlines and travel agents amounting to more than IDR 200 billion to attract international and overseas tourists (other than China) to Indonesia, providing discounts for flight tickets going to or from 10 Priority Tourism Destinations (DPP) reaching 50 percent for each passenger with a total of 25 percent of the total aircraft seats at the cost of around IDR 490 to IDR 500 billion (Ministry of Finance, 2020; Paper Indonesia, 2020). In addition, there is an additional 15.8 percent discount on Avtur from Pertamina and a 5.64 percent discount on flight fares from PT Angkasa Pura Indonesia and the Indonesian Aviation Navigation Services Organizing Agency (Airnav Indonesia). However, this stimulus policy to increase tourist arrivals did not significantly impact because the policy was set at the end of February 2020, shortly before the COVID-19 pandemic entered Indonesia. During the COVID-19 pandemic, there were concerns about traveling, both for domestic and foreign tourists, so the utilization of this stimulus did not go well.

Other policies issued by the government during the COVID-19 pandemic were government fiscal incentives to save the tourism industry and workforce. The policies issued are hotel and restaurant tax exemptions for 6 (six) months with a compensation of IDR 3.3 trillion (Sugihamretha, 2020), expansion of government-borne ITA 21 exemption (DTP) for accommodation and restaurant sector workers, pre-employment card assistance to workers in Indonesia, including tourism workers, and an incentive of 600 thousand per month for workers registered with BPJS employment with an income below IDR 5 million per month. Several parties positively received this policy to save the tourism industry, but there are still some notes where the tourism industry expects more direct cash assistance from the government rather than tax incentives. Because revenues from accommodation, eating, and drinking have also decreased significantly, the provision of tax incentives will be useless. The stimulus of government assistance to protect the tourism workforce has been effective, but it has not been able to provide certainty to all tourism sector workers and cannot guarantee new jobs post-COVID-19.

Economic stimulus policies for the tourism sector should simultaneously be accompanied by discipline in implementing COVID-19 prevention protocols for

tourism industry managers and communities in tourism destinations to increase the confidence of tourists to visit 10 Tourism Destination Priorities. These health protocols manifest themselves in cleaner and healthier behaviors consistently every day, such as wearing masks while in public areas, routinely washing hands using soap and running water or hand sanitizers, trying to avoid touching exposed body parts such as the nose, eyes, and face with unclean hands and practicing physical distancing of at least 1 (one) meter from other people in public areas (Kiswanto et al., 2020).

### **Government Policies Related to the New Normal Era Tourism Paradigm**

Based on the calculation of the decline in the number of tourist visits from UNWTO in scenarios 2 and 3 (opening of travel activities in September and December), tourism in Indonesia at the end of 2020 will only reach 4-5 million foreign tourist visits. The foreign tourist market is expected to return to normal gradually in 2021 and 2023. GDP contribution in the tourism sector will also experience negative growth by the end of 2020. GDP growth projection in industries related to the provision of accommodation and food and beverages is growing by -5.2% to -7.9%; the transportation and construction sector grew by -3.1% to -7.5% and 2.2% to -0.9%,

respectively. Several events that can leverage tourism, which will be held in 2020, have been delayed until an undetermined time, such as Formula E 2020, PON 2020, the Jogja Marathon, the Indonesia Open 2020, et al.

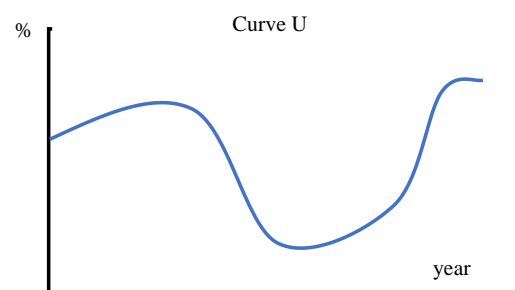
The COVID-19 pandemic has also changed the tourism paradigm, where (1) Tourist attractions must now apply physical distancing and visit restrictions (quotas); (2) Airports, terminals, and stations must apply high sanitation standards; (3) Product differentiation, where fresh water, adventure, mountains, oceans, nature, and outdoor health tourism replaces mass tourism; (4) Value proposition, where initially cheap and overcrowded became a young, clean, and quality experience; (5) Group travel marketing focus is shifted to free independent travelers (FIT); and (6) Hygiene labeling is essential.

Based on the 2019 Travel & Tourism Competitiveness Index (TTCI) publication, Indonesia's cleanliness and health indicators received 4.51 points, far below the world average of 5.60 (Calderwood & Soshkin, 2019). In addition, Indonesia's security and safety indicator scored 5.37 points and ranked 80th out of 140 countries. These two indicators need to be taken seriously for policies issued by the Indonesian government in the future, considering that the direction of post-COVID-19 tourism policy is to travel to

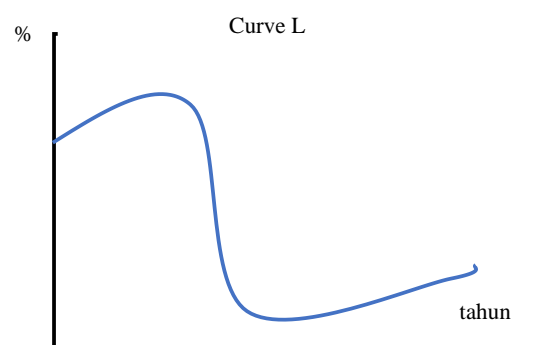
destinations that can provide certainty of hygiene, cleanliness, and health, accompanied by security and safety for tourists.

### **Tourism Policy Analysis: Special Concerns and Proposed Recovery Policies After the Covid-19 Pandemic**

In the New Normal era, some lessons for tourism worldwide need to be considered for recommendations for tourism development strategies in Indonesia. Although the recovery process will differ in each country, a typical pattern found that people are still willing to travel, even though it is predicted that domestic travel will recover faster than international travel.



**Gradual slowdown and recovery**



**Slowdown and stagnation (recession)**

Figure 2. The Trend of the Economic Recovery Scenario After the COVID Pandemic 2019

Source: Sambodo (2020)

Policy analysis and proposals for tourism recovery after the COVID-19 pandemic need to consider specific matters. These include: 1) Countries that lack domestic tourist markets will recover more slowly and may open their markets to tourists from nearby countries; 2) Younger travelers will travel first where travel is still limited to nearby destinations; 3) The economic impact of tourism will recover faster where outdoor and nature-related destinations will be more popular than urban destinations; 4) To capture the initial demand, travel industry players should shift their resources quickly through digital (internet-based) marketing by developing modified processes and products; 5) Convenience stores and retailers should implement protocols that protect customer and employee health and help restore consumer confidence; 6) Product features, communication strategies, and marketing channels must be reworked to suit the customer mix of millennial and Gen Z consumers who will replace the baby boomer generation.

Besides being caused by the COVID-19 pandemic, there are several fundamental problems and obstacles in the tourism sector. First, the downward trend in

foreign tourist spending is due to the poor quality of tourism products and services. The second thing is the limited accessibility into Indonesia and between regions in Indonesia itself to support longer tourist trips. The third thing is more related to the limited carrying capacity of destinations, such as limited water supplies and increased garbage piles, as well as the community's readiness as hosts and professional tourism actors. The fourth is the limited number of human resources with the skills the professional tourism industry requires. The fifth thing is the limited investment and capacity of the tourism industry to offer world-class attractions. Sixth, tourism destination governance has not been optimized, which also supports business certainty, ease, and a sustainable environment. The seventh thing concerns the limited awareness of tourism actors toward disaster preparedness.

The following briefly describes the strengths, weaknesses, potentials, threats, and current trends in the tourism sector during the pandemic as a basis for providing direction for policy recommendations.

Strengths	Weaknesses
<ol style="list-style-type: none"> <li>Digital Adaptation: The tourism sector has utilized digital technology to conduct its business virtually, including marketing, reservations, and virtual travel experiences.</li> <li>Flexibility and Innovation: Some tourism companies have demonstrated the</li> </ol>	<ol style="list-style-type: none"> <li>Decline in Tourist Visits: The tourism sector saw a drastic decrease in tourist arrivals, which harmed revenue and employment.</li> <li>Dependence on Mass Tourism: Destinations heavily dependent on mass tourism may face</li> </ol>



<p>ability to adapt quickly by developing new products and services to suit the pandemic.</p> <p>3. Environmental Conservation: With the decline in mass tourism, some natural destinations have experienced positive environmental recovery.</p>	<p>more significant difficulties adapting to the pandemic.</p> <p>3. Safety and Health: Safety and health are top priorities, requiring additional costs for compliance with health and safety protocols.</p>
<p>Opportunities</p> <p>1. Sustainable Tourism Development: The pandemic provides an opportunity to redesign a more sustainable tourism model, including efforts to preserve the environment and the welfare of local communities.</p> <p>2. Domestic Tourism: Increased interest in in-country tourism can allow local destinations to develop their products and services.</p> <p>3. Collaboration with Related Industries: Related industries such as food and beverage, arts, and culture can work with the tourism sector to enhance the traveler experience.</p>	<p>Threats</p> <p>1. Pandemic Uncertainty: Rapid changes in the pandemic situation can make long-term business planning difficult.</p> <p>2. Government Policy Uncertainty: Changes in government policies related to travel and health policies can affect tourism business plans.</p> <p>3. Global Competition: Tourism destinations compete to attract travelers, and competition has intensified during the pandemic.</p>

As explained at the beginning, this paper aims to analyze the portrait of Indonesian tourism after the COVID-19 Pandemic and provide recommendations for economic policy adaptation and recovery, both in the short term and the medium and long term. Based on the considerations presented, it is necessary to prepare tourism policy proposals for both fundamental problems and constraints, as well as issues due to the COVID-19 pandemic to stimulate the national economy.

### A. Proposed Short-term Policy

Environmental protection, cultural preservation, and empowerment of local communities should be integrated into tourism development. It can include waste reduction, the use of renewable energy, the promotion of local products, and the involvement of local communities in tourism-related decision-making. Proposed tourism sector policies in the context of short-term recovery after the COVID-19 pandemic can be carried out in the form of:

- 1) Reorientation to quality tourism, not just mass tourism;
- 2) Providing subsidized interest and credit restructuring (loans and multifinance) to Micro, small, and Medium Enterprises at banks or other financing institutions, including for subsidies or postponement of taxes for Small and Medium Enterprises as well as labor;
- 3) Incentives for recruitment, certification training, and placement of workers through the expansion of training, including technical guidance on making long-stay service packages for independent isolation;
- 4) Facilitation of Regional Governments to continue the development of 3A (accessibility, amenity, and attraction) affected by the termination of the tourism physical Special Allocation Fund, with particular attention to hygiene facilitation;
- 5) Acceleration of infrastructure development in priority destinations;
- 6) Promotion, exhibitions, and tourism events are gradually being activated;
- 7) Increasing

incentives for tourism businesses, airlines, travel agents, and promotions in the form of discounted airline tickets and discounted jet fuel at several priority tourism destination airports, providing incentives for group incentive trips and family trips held in Indonesia.

In the short term, paying attention to safety and cleanliness is also necessary as essential factors influencing tourist interest and trust. The government needs to increase security surveillance in tourist destinations by increasing security patrols and providing tourism information officers ready to help tourists. In addition, it must improve efforts to maintain and clean the environment in tourist destinations. Development needs to encourage increased investment in the tourism sector by involving the public and private sectors. Support will be in the form of licensing facilitation, tourism infrastructure development, and improving the quality of human resources in the tourism sector.

Meanwhile, several short-term policy directions are suggested for the MSME sector affected by the tourism sector, including a) direct financial assistance, b) reduction of financial burden, c) increased access to financing, and d) digitalization. Direct financial assistance to affected MSMEs can be through cash assistance, tax relief, or wage subsidies. The financial burden reduction can be through a

moratorium policy on business loans and credit payments, including interest relief. Increased access to financing can be through policies that facilitate MSMEs' access to low-interest loans or microcredit to maintain their liquidity. Policy directives related to digitalization can be through efforts to encourage MSMEs to adapt to digital ways of doing business, including training and technical assistance.

### **B. Proposed Medium-Term Policy**

Medium-term handling should be done through process improvement and value chain management in tourism. In this case, the Pentahelik collaboration strategy must also be part of handling COVID-19, which includes Academic, Business, Government, Community/Customer, and Media. This medium-term policy proposal can complement what has been stated in the NMDP 2020–2024, especially where this document recognizes the importance of digital technology in developing the tourism sector. Technology utilization will be enhanced for destination marketing, tourism information management, digital payments, and innovative tourism experiences. In addition, the NMDP 2020–2024 document emphasizes the importance of local community empowerment in developing the tourism sector. It includes community involvement in destination management, skills training, improving the

quality of tourism products and services, and providing access and economic opportunities to local communities (GoI, 2020). Proposed tourism sector policies in the context of medium-term recovery after the COVID-19 pandemic can be carried out in the form of: 1) Providing tourist discounts for students and college students, State Civil apparatus, the army and police, health workers, and senior citizens, and the implementation of collective leave and holidays that support the increase in domestic tourists; 2) Marketing to nearby and recovering origins; 3) Increased incentives for tourism businesses, airlines, travel agents, and promotions in the form of discounts on airline tickets, aircraft parking, and jet fuel discounts at several priority tourism destination airports; providing incentives for group incentive trips or family trips held in Indonesia; promotion through influencers; 4) Working with airlines for the recovery and addition of flight schedules; 5) Organizing international events such as sports, arts, and MICE (Meeting, Incentive, Convention, and Exhibition), including the successful organization of Moto GP, the U-20 World Cup, and others.

Promoting Indonesian tourism to the international world must be complemented by things that can show increased standards of cleanliness, health, and safety for visitors to Indonesia; 6)

Improvement of 3A infrastructure (amenity, accessibility, and attraction) in tourism destinations both through the State Budget, transfer funds, Regional budgets, State-Owned Enterprises, the private sector, and Government-Business Entity Cooperation; 7) Incentives for recruitment, training, certification, and placement of labor through the expansion of 3-in-1 activity for as many as 100, 000 workers; 8) Cooperation in training and internships for tourism and creative economy human resources, including technical guidance on improving health, hygiene, and safety standards, especially for small and medium enterprises; 9) Increased bidding for international MICE events in Indonesia; 10) Escorting the realization of large-scale tourism investment 11) Increasing access to financing for tourism businesses and creative actors, both through banks and non-banks.

Meanwhile, several medium-term policy directions are suggested for the MSME sector affected by the tourism sector, including a) capacity development, b) improvement of product and service quality, and c) access to digital markets. Capacity development in the form of training and mentoring programs for MSMEs is to manage businesses more efficiently and sustainably. Product and service quality improvement can be done through policies encouraging MSMEs to

improve the quality of their products and services to increase their competitiveness in the market. Policy directives related to access to digital markets can be through efforts to encourage the presence of MSMEs in e-commerce platforms and digital markets and provide support in marketing their products.

### **C. Proposed Long-Term Policy**

Long-term handling should be by constructing a tourism industry operating system. It must prepare to create a tourism industry operating system as a long-term solution. The success of the tourism sector is when there are things that tourists can see and activities that tourists can do at tourist destination locations. Proposed tourism sector policies in the context of long-term recovery after the COVID-19 pandemic can be by 1) Strengthening the supply side, 2) Strengthening Attractions, 3) Strengthening Access, and 4) Strengthening the demand side.

Strengthening attractions as part of a long-term strategy can be done through diverse types of tourism, such as cultural tourism, education, sports, health, history, and others. Tourist attractions must also be diversified into Special Economic Zones (SEZs) and tourist locations. To strengthen access, things that need to be done are 1) improving linkages between modes of transportation to balance the development

of physical infrastructure; 2) Optimizing the use of information technology to harmonize information on the tourism agenda in all regions; and 3) Synergizing the tourism calendar better. Strengthening the demand side should be done by optimizing the potential of domestic tourists, tourism cards for students and senior citizens, and tourism discount cards for the general public.

Meanwhile, specifically in the MSME sector affected by the tourism sector, several long-term policy direction suggestions, including a) Improvement of Infrastructure such as internet networks, transportation, and logistics that can support the growth of MSMEs; b) Sustainable Fiscal Policy including fair and pro-MSME tax policies; c) Strengthening Inter-MSME Cooperation to increase bargaining power and access to larger markets; d) Education and Training for MSME entrepreneurs and workers to increase expertise and innovation; e) Improvement of strong Social Protection for MSME workers, including health insurance and labor protection; f) Environmental Sustainability through efforts to encourage sustainable business practices among MSMEs and provide incentives for the use of environmentally friendly technology.

### **CONCLUSION**

Before the COVID-19 pandemic,

tourism development focused on supporting efforts to strengthen priority tourism destinations (DPP) and revitalize Destination Bali to capture as much foreign exchange as possible through increased mass tourism. The COVID-19 pandemic that affects the world community is a disaster for the tourism sector, including Indonesia. Tourism development is forced to adapt to the pandemic, which the Indonesian government translates into a new normal. Current efforts are related to disaster management and reviewing national and regional planning for the tourism sector. The recent portrait of tourism is described as a condition that requires extraordinary handling. At the end of 2020, various experts predict tourism in Indonesia only reach 4-5 million foreign tourist visits. The foreign tourist market is expected to return to normal gradually, starting in 2021 and returning to normal in 2023. Since March 2020, the Government of Indonesia has issued several economic stimulus policies to create stability in several sectors of the country's economy during the COVID-19 pandemic, but the results were not as expected.

This paper provides specific policy proposals for the tourism sector in the short, medium, and long terms. This proposal is based on a literature review of the portrait of tourism before and after the COVID-19 pandemic, including the ineffectiveness of

policies issued by the current Indonesian government. The results of the analysis recommend that the review of tourism development planning emphasize general stimulus, MSME (Micro, Small, and Medium Enterprises) stimulus, structuring accommodation packages, transportation and access, taxation stimulus, technical guidance, strengthening tourism diversification, and strengthening the demand and supply sides of tourism. The government needs to improve a more optimal Pentahelik collaboration strategy in handling COVID-19, which includes Academic, Business, Government, Community/Customer, and Media. In terms of institutions and funding, cooperation between the public and private sectors is vital to tourism development. The government needs to create a framework that allows the active participation of the private sector in tourism investment and growth. It can involve public-private partnerships in destination management, joint promotion, and tourism product development.

This research is imperfect due to various limitations, including no direct field visits with tourism actors and other affected businesses. It may affect the results of the study and introduce bias. Therefore, to overcome these limitations, future researchers must design their research carefully, rely on reliable data sources,

consider policy changes, and pay attention to research ethics.

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