



## New Orientation Strategy into Domestic Market for Bali Tourism Destination after the COVID-19 Pandemic

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### ABSTRACT

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*tourism sector, recovery strategy, domestic tourists, domestic marketing, domestic destination*

This research aims to determine the New Orientation Strategy into Domestic Market for Bali Tourism Destination after the COVID-19 Pandemic. This research conducted a study of secondary data and facts regarding the situation of Bali tourism destinations. The data is presented through a descriptive qualitative analysis based on the 4A factors (Attraction, Accessibility, Amenities, Ancillary), and also explains the motivation of domestic tourists traveling to Bali. The strategy offered is that promotion outside these areas needs to be increased. The strategy offered is to maintain or improve the quality of service, security, and arrangement of holiday or recreation places. Promotion through electronic media needs to be increased, and tourist satisfaction must be maintained and continued in both quality and quantity. The development of tourism from a cultural and environmental perspective is still very relevant as a reference for tourism development in Bali. The future development of Bali tourism should be more directed at efforts to conserve and organize the coastal/sea, mountains, lakes, and rice fields. The development of cultural tourism attractions is more oriented towards the revitalization of these types of cultural tourism attractions. The strategy offered is improving service quality, and security and structuring shopping centers that provide local products. The strategy offered is to increase the competitiveness of tourist attractions in other areas of Bali. The strategy offered is improving the quality of restaurant businesses, diversifying souvenirs, and empowering craftsmen groups.

## 1. INTRODUCTION

Taking into account the offers that are available and that have been prepared for foreign tourists, the level of foreign tourist arrivals has not shown a significant increase. Flight restrictions, health restrictions for foreign citizens, world security conditions, and wars taking place in Russia, Ukraine, Israel, and Palestine, can be significant reasons to divert the Bali tourist market to the domestic tourist market [1].

On the demand side, the increasing income of Indonesian citizens has caused purchasing power for holiday needs to also increase. The location of the Bali Tourism Destination in the central part of Indonesia is also a strength in itself for Bali because it can be more easily reached by tourists from the western part of Indonesia, and also from the eastern part of Indonesia. The rapid development of air, land, and sea transportation technology is also a supporting factor for tourists to make it easier to vacation in Bali [2].

Currently, tourism in modern times has become a basic living necessity for modern societies. For certain societies, the ability to travel has been linked to basic human rights especially as it relates to the long holidays and paid vacation allowances [3]. Good and sustainable tourism management is expected to allow any tourism destination's economy to

develop and improve [4]. The use of local materials and supplies in the hospitality service will also allow local industries to take an important role in the procurement of goods and services related to tourism [5].

Technological development is an increasingly intense and complex competition to encourage travelers to visit a certain tourism destination [6], the need for advanced technology especially industrial technology should encourage tourism destinations to develop the ability to apply the latest technology for tourism purposes [7]. In those destinations, rapid technological advancement will happen, expected to be appropriated according to need, which will support other economic activities [8]. In such a case, tourism development should bring a wider, more fundamental impact on the local communities and governments. Tourism will be an inseparable part of the development of a region and will be integrated into the framework of the region's improvements in its peoples' societal welfare [9].

As can be seen in Table 1, the contribution of each economic sector to Bali's GRDP in 1970 was dominated by the primary sector at 54.64%, the secondary sector at 2.76%, and the tertiary sector at 40.60% [10]. The dominance of the primary sector in gross national product and employment caused the government at that time to reorient its policies to

encourage greater economic development in the Bali region and create a balanced role between sectors in the economy. Bali region [11]. In order to create a new balance in Bali's economic structure, three sectoral policies were issued, namely agricultural development in a broad sense, development and development of the tourism sector, and development of the small industrial sector [8].

**Table 1.** Development of Bali's economic structure 1970-2020

Year	Development Sector		
	Primary	Secondary	Tertiary
1970	54.64%	2.76%	40.60%
1980	50.58%	9.81%	39.70%
1990	34.96%	11.39%	53.64%
2000	19.98%	13.93%	66.09%
2010	18.67%	16.73%	64.60%
2020	14.50%	18.80%	69.71%

Source Data: Bali in Numbers (2021) [12].

Initial conclusions can be drawn from Table 1 regarding the evolution of Bali's economic structure from 1970 to 2020, but at the same time the problem is that Balinese people will find it difficult to return to the primary sector (agriculture) [8]. Restoring the tourism sector is a more realistic and competitive step for Bali, which has limited agricultural land, a dense population and a culture of people who are accustomed to working in the tourism sector [13].

Currently there are hundreds of hotels and thousands of rooms available in Bali tourism destinations [14]. Hotels in Bali Airport (1 Hotel), Hotels in Badung Bali (1066 Hotels), Hotels in Buleleng Bali (74 Hotels), Hotels in Candidasa Bali (12 Hotels), Hotels in Canggu Bali (99 Hotels), Hotels in Denpasar Bali (202 Hotels), Hotels in Gianyar Bali (310 Hotels), Hotels in Jimbaran Bali (107 Hotels), Hotels in Karangasem Bali (97 Hotels), Hotels in Kerobokan Bali (160 Hotels), Hotels in Kintamani Bali (7 Hotels), Hotels in Klungkung Bali (52 Hotels), Hotels in Kuta Bali (392 Hotels), Hotels in Legian Bali (178 Hotels), Hotels in Manggis Bali (18 Hotels), Hotels in Negara Bali (6 Hotels), Hotels in Nusa Dua Bali ( 57 Hotels), Hotels in Pecatu Bali (35 Hotels), Hotels in Sanur Bali (209 Hotels), Hotels in Seminyak Bali (359 Hotels), Hotels in Singaraja Bali (65 Hotels), Hotels in Sukawati Bali (14 Hotels), Hotels in Tabanan Bali (46 Hotels), Hotels in Tanah Lot Bali (1 Hotel), Hotels in Tanjung Benoa Bali (46 Hotels), Hotels in Ubud Bali (403 Hotels), Hotels in Ungasan Bali (29 Hotels) [15]. The number of hotels and rooms available in Bali Tourism Destinations in shows how much labor is absorbed by the tourism sector, especially by the hotel accommodation sector. In conclusion, the tourism sector is very important for Bali [16].

Bali Tourism Destination cannot deny that domestic tourists are a potential market share that has tended to be neglected. Therefore, the existence of foreign tourists is something that should be taken into account and needs to receive more serious attention [17]. One of the important things that needs to be pursued to support the development of the foreign tourist market is the availability of information regarding the characteristics of foreign tourists that is more reliable and adequate [18]. Regarding efforts to determine the characteristics of domestic tourists who visit Bali, research is needed that can provide various information about the characteristics of domestic tourists, including regarding accommodation/place to stay, length of stay, modes of

transportation used, expenses while in tourist destinations, as well as expectations and levels of travel. their satisfaction with the destination visited. This information can be used as a guide for formulating policies and strategic steps in the field of marketing and providing quality products to tourist expectations [19].

For Bali, returning to the agricultural sector is less relevant given the increasingly limited agricultural land and the increasing population of Bali. Balinese people are too comfortable with the tourism sector and in fact, the tourism sector promises better and more certain results for the majority of Balinese people today [20]. This research aims to find a solution to the decreasing level of tourist visits to Bali through various analyses based on the dimensions of tourist attractions, travel access, amenities, and tourism-supporting factors as New Orientation Strategy Into Domestic Market for Bali Tourism Destination after the COVID-19 Pandemic [21].

## 2. LITERATURE REVIEW

Along with the widespread development of the tourism sector which has provided benefits for human welfare. Tourist travel and movement have become one of the basic forms of human activity to fulfill various life needs, both in the form of experience, enlightenment, physical and psychological refreshment, and in the form of self-actualization. This tourism marketing section presents the following material: Tourism Marketing Mix [22], Tourism Destination Life Cycle, Tourism Marketing Communication, Holistic Marketing in the Tourism Services Industry, Tourism Consumers and Travel Motivation, Tourism Product Mix, Tourism Supply, Tourism Accommodation and Culinary Industry, Packages Tourism, Market Segmentation, Measuring Tourist Satisfaction, Measuring Tourist Loyalty [23], Tourism Destination Image, Marketing Strategy for Sustainable Tourism Destinations, Potential of the Domestic Tourist Market Segment for the Bali Tourism Industry which tends to be often overlooked [24].

In the tourism concept, there are four aspects (4<sup>a</sup>: Attraction, Accessibility, Amenities, Ancillary) that must be considered in tourism offers [25]. These aspects are as follows: Attraction is a tourist destination to attract tourists that has attractions, both natural attractions and people and culture [26]. Accessibility is intended so that domestic and foreign tourists can easily reach their destination at tourist attractions [27]. Amenities are indeed one of the requirements for tourist destinations so that tourists can feel at home staying longer in a tourist destination. Ancillary to the existence of tourism institutions, tourists will visit and search for tourist destinations more often if in these areas tourists can feel safe and protected [28].

The increase in Indonesia's domestic income and changes in people's behavior towards tourism development have become important studies for aspects of demand for tourism itself. The main factors influencing tourism demand can be explained as follows [29]:

(1) First prize; High prices in a destination affect or influence tourists' desire to travel, so that tourist demand decreases and vice versa [30]. (2) income; When a country's income is high, the tendency to choose a tourist destination as a vacation spot is higher, and potential tourists can start a business in that tourist destination if they feel it is profitable [31]. (3) Socio-Cultural; With the existence of a unique social culture that is distinctive or different from the country of origin of the prospective tourist, demand for tourism will increase

sharply [32]. This stimulates curiosity and exploration of knowledge as a treasure trove of the richness of tourists' cultural mindsets. (4) Social policy, meaning that social and political impacts are not yet visible when the destination is safe and peaceful. However, if this does not correspond to reality, the social and political impact and influence on increasing demand will be very pronounced. (5) family intensity; It can be ascertained whether there are many or few families who participate in the tourist request. The more families there are, the greater the desire to go on holiday with one of those families, this can be seen from the interest of the tourists themselves. (6) Price of replacement goods; Apart from the five aspects mentioned above, the price of substitute goods is also included in the demand aspect, for example substitute goods are a substitute for Tourist Attraction which is used as a travel reserve, such as to Bali as the main tourist destination in Indonesia [33]. For one reason or another, Bali cannot meet the requirements of tourist destination areas, so tourists indirectly divert their destinations to nearby areas such as Malaysia and Singapore. (7) Price of complementary goods; is a good that helps each other or in other words, complementary goods are goods that complement each other, whereas in the context of tourism, complementary goods are tourist attractions that complement other tourist attractions [34].

Currently, the need for vacations and travel has become a basic need for humanity, including Indonesian citizens. The following are some of the essential needs of humankind [15]: (1) Physical needs are the basic needs for human survival. These basic needs are realized in various things related to food, drink, clean air, housing, clothing and other physical needs that are beneficial to humans. (2) The need for security is the need for a sense of security which represents a person's desire for self-protection both physically and mentally, for guaranteed health and stability in life. These needs can be in the form of old age insurance programs, health insurance, security guarantees from security officers, etc. (3) Social relationship needs are the need for social relationships, "personal interaction needs", namely the human need to love and be loved, the need for friendship between other people [24]. The need for personal interaction can be manifested in the form of the desire to get married, the desire to establish allies or connections with professional colleagues, the same hobbies and the same ideals. (4) The need for recognition is a person's need to be noticed by others, to achieve social status, to have the same rights as humans, to receive respect and recognition, and possibly to occupy a certain position in a social group. This need can be manifested in the desire to take a leadership role in a group or regional organization, for example becoming a regent, governor, etc. (5) The need for self-actualization is the highest level of human need. This need is realized in the form of a person's creativity to create their best work as a form of self-realization. Self-realization can occur in the application of acquired knowledge. The idealism he sparked, or the desire to realize the dreams that already exist in someone's mind [35].

### 3. MATERIAL AND METHODOLOGY

This research has conducted a study of secondary data, as well as the facts of the situation on Bali's tourism destinations. The tourism sector is a sector that is interrelated with other sectors and tourism is very dependent on other sectors, but the success of the tourism sector can also have a multi-sector impact on various sectors in a tourism destination [17].

It is based on research data on Market Analysis and the Domestic Tourist Satisfaction Index which has been carried out by the research team of the Bali Province tourism office, and is also compared with several research results which have been carried out by the author himself which are related to the condition of Bali tourism before the COVID-19 pandemic, during the Pandemic, and current conditions [36].

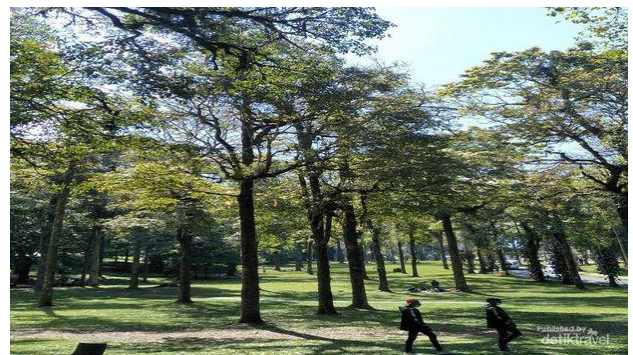
The data is presented through a descriptive qualitative analysis based on the 4A factors (Attraction, Accessibility, Amenities, Ancillary), and also explains the motivation of domestic tourists traveling to Bali [37].

## 4. RESULTS AND DISCUSSION

Several conditions of Bali tourism destinations can be described in several discussion points.

### 4.1 Bali attraction conditions

Below are listed the 10 most famous tourist attractions in Bali. Bali has always been a favorite holiday destination for domestic and foreign tourists. Every New Year, resolutions to go on holiday to Bali appear on social media. However, there are several legendary tourist attractions in Bali that you must visit. Here are 10 iconic tourist attractions in Bali for your holiday [7]:



**Figure 1.** Bedugul Botanical Gardens, Tabanan Regency [14]

Bedugul Botanical Gardens (Figure 1) is a natural tourist park where you can picnic and relax with your family. The smell of cool mountains and cool air makes the start of the new year feel so peaceful and far from the hustle and bustle of the city. Also, there are still many interesting tourist attractions that you can visit, such as the orchid garden, cactus greenhouse, water park, and many more. To enter the Bedugul Botanical Gardens there is an entrance fee of IDR 30,000 [33].



**Figure 2.** Kuta Beach, Badung Regency [14]



Kuta Beach (Figure 2) can be the best holiday destination in Bali because of its beautiful sunsets and ocean waves. In fact, it's not only busy on holidays, many tourists also flock to this beach on weekdays. Kuta Beach is a child-friendly area that does not require an entrance fee, so it must be included in your 2024 holiday itinerary [34].



**Figure 3.** Garuda Wisnu Kencana, Badung Regency [14]

The next tourist attraction that is a shame to miss is Garuda Wisnu Kencana (Figure 3) or abbreviated as GWK. As the name suggests, GWK is home to the Garuda Wisnu Kencana statue, the fourth tallest in the world. The statue was designed by renowned local artist Nyoman Nuarta. To reach this magnificent statue, visitors will ride a buggy to explore the beautiful cliffs. On certain holidays, GWK often holds concerts or musical performances by local musicians [35].



**Figure 4.** Tegallalang, Ubud, Gianyar Regency [14]

Ubud is famous for its natural and rural areas, suitable for tourists who want to experience a calm and warm atmosphere. One area in Ubud that can become a tourist destination is Tegallalang (Figure 4). The unique views of rice fields and terraces as well as the stunning backdrop make this place a favorite photo spot for tourists. In the surrounding area, visitors can also enjoy traditional dance performances. Many tourists also come to this tourist spot for meditation and introspection [36].

Tanah Lot (Figure 5) is one of the destinations that must be visited if you want to vacation in the Tabanan-Bali area. Tanah Lot is considered to symbolize Balinese romance because of the beauty of the temple's silhouette at sunset. Even though it is famous for its sunset views, there is no harm in visiting this place in the morning to feel the calm of the morning sea. Tanah Lot ticket prices currently start from IDR 15,000 for domestic tourists and IDR 30,000 for foreign tourists. Tanah Lot is approximately 30 kilometers from Ngurah Rai Airport [37].



**Figure 5.** Tanah Lot Temple, Tabanan Regency [14]



**Figure 6.** Temple of the Holy Spring, Gianyar Regency [14]

Apart from admiring the natural beauty, you can also try visiting Tirta Empul (Figure 6), a cultural tourist attraction located in Gianyar during your holiday. The name Tirta Empul itself means holy spring that radiates from the ground. Considering that the main function of the temple is as a place of worship for Hindus, you can visit the temple while purifying (melukat) with the temple's holy water. Apart from paintings, visitors can walk around the area and visit buildings and gardens typical of Balinese culture which look very beautiful.

To enter the Holy Spring Temple tourist attraction, tourists need to pay an entrance fee of Rs. 15,000. Pura Mata Air Suci is a Hindu temple and is a favorite destination for tourists in Bali. Located in central Bali, Manukaya Village, Taksilin District, Gianyar Regency. This temple is famous for its holy water and is a place where Balinese Hindus seek purification. Not only Hindus but tourists can also perform purification at the Holy Springs Temple [38].



**Figure 7.** Campuhan Ridge Walk, Gianyar Regency [14]



There's nothing wrong with enjoying the sunset around Campuhan Ridge Walk (Figure 7). This destination must be included in the list of recommended tourist attractions in Bali which are a shame to miss. Not without reason, there are many fun activities you can do. Starting from jogging or taking a leisurely walk accompanied by cool air and beautiful views, to cycling in the afternoon watching the beautiful panoramic sunset from the top of the mountain, to hunting for photos on Mount Campuhan. It should also be noted that this destination location is free to enjoy without paying any fees [39].



**Figure 8.** Kelingking Beach Nusa Penida, Klungkung Regency [14]

One of the iconic destinations in Bali that you can visit next is Kelingking Beach (Figure 8) in Nusa Penida. This beach is located in West Nusa Penida, Bali. The name Kelingking Beach itself comes from the appearance of this beach which looks like a little finger, although some say it looks like a Tyrannosaurusrex. On this beach, visitors can take selfies on the cliffs which show the beauty of Kelingking Beach. The entrance fee to Kelingking Beach is IDR 5,000 per trip [1-5].



**Figure 9.** Ulun Danu Beratan Temple, Tabana Regency [14]

The next tourist attraction recommended for tourists to visit is Ulun Danu Beratan Bedugul Temple (Figure 9). This tourist destination has natural beauty and is also the center of religious activities for the Balinese people, such as Melasti.

The attraction of Uluen Temple is located on the shores of Lake Bharatan. With a beautiful mountain backdrop, this towering temple is the most iconic photo spot for tourists. Visitors can also take a boat around the lake. To enjoy the beauty of this tourist attraction, the ticket price is IDR 30,000 for domestic tourists and IDR 70,000 for foreign tourists [1-5].



**Figure 10.** Trans Studio Bali Amusement Park, Denpasar City [14]

The last tourist spot that you must visit with your family is Trans Studio Bali (Figure 10). The only indoor recreation park in Bali featuring 16 world-class rides and spectacular shows. There is Bali Senses, an interactive digital technology zone, Flying Over Indonesia, a virtual paragliding ride around the archipelago. After the performance, visitors can take part in the Dream Festival parade performance. Here the Trans Studio Bali logo will circle the amusement park area before dancing and ending with fireworks and confetti. Entrance fees for domestic tourists usually range from IDR 225,000 – IDR 275,000 per person. Above are 10 recommendations for tourist attractions in Bali that you must visit to welcome the New Year [1-5].

## 4.2 Bali accessibility conditions

Of all passengers leaving Bali via Gilimanuk Harbor, Padangbai, and the Ngurah Rai Airport Domestic Terminal, it is known that 82.4% of them are domestic tourists. The number of male domestic tourists visiting Bali is slightly more than female domestic tourists. Domestic tourists visiting Bali are dominated by the 26-55 year age group and the 16-25 age group. The five categories of potential tourist markets for Bali tourism are the provinces of East Java, West Nusa Tenggara, East Nusa Tenggara, DKI Jakarta, Central Java, and Yogyakarta. Based on occupation, foreign tourists who visit Bali are dominated by private sector employees, students, civil servants, and entrepreneurs. There are slightly more domestic tourists visiting Bali by land than by air. The mode of transportation most frequently used by foreign tourists while visiting Bali is a rental car [39].

## 4.3 Bali amenities conditions

Based on the type of accommodation used, it turns out that it is dominated by star hotels and family or friends' homes. The allocation of foreign tourists' expenses during tourist visits to Bali is dominated by expenses for accommodation, souvenirs, and consumption. Based on length of stay in Bali, the highest percentage of foreign tourists who visit Bali are those who

have a length of stay of 2 nights (3 days) with an average length of stay of 4.3 days. Based on average daily expenditure, it is known that foreign tourists who visit Bali are dominated by those with an average daily expenditure of IDR. 200,000 – 400,000, where the average expenditure of foreign tourists is IDR. 530,000 per day [38].

#### 4.4 Bali ancillary conditions

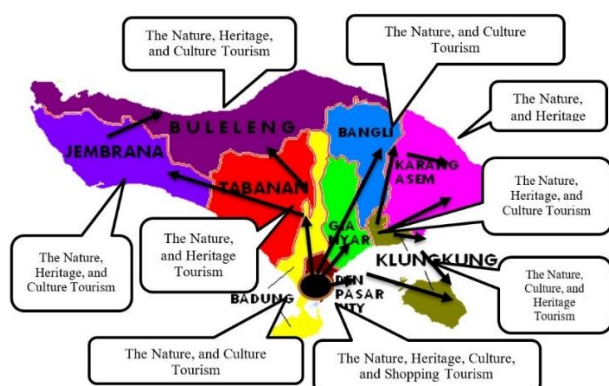
Almost all foreign tourists who visited Bali expressed good to very good impressions of the hospitality of the Balinese people, the cleanliness of the environment in Bali, security conditions in Bali, services at the entrance gate to Bali, taxi services or public transportation in Bali, hotel or accommodation services in Bali. Restaurant services in Bali, traffic conditions in Bali, and the tourist attractions visited. Most foreign tourists who visit Bali state that they do not use tour guide services. Based on their level of satisfaction during their visit to Bali, some foreign tourists expressed the impression of being satisfied and very satisfied [34].

Based on the periodicity of visits, foreign tourists who visit Bali are dominated by foreign tourists who make repeat visits 2 to 5 times. Domestic tourists who visit Bali are dominated by tourists to visit for vacation/recreation and visit friends or family. Domestic tourists who visit Bali generally do not use tour packages and those who use tour packages generally come from school and college students. Domestic tourists who visit Bali are generally accompanied by friends or family [40].

#### 4.5 Bali tourism branding

From the appearance of tourist attraction information in all of the regencies and cities in Bali, it can be deduced that Bali's tourism has a notable presence in nature, culture, and heritage. The provincial government must have the capacity to come together as a consensus to determine the priority scales for development based on the benefits of each region, the center of tourism, and the supporter of tourism. More importantly, what is the ideal distribution system, and what factors determine the composition of the distribution of tourism's contribution to regional development in the Province of Bali.

All of the tourist destinations in every region and city in Bali's Province seem to be of the same type, except for the City of Denpasar. As such, a joint promotional program that promotes the Province of Bali will have the potential to be more effective and efficient.



**Figure 11.** The Branding Bali, based on of Regencies Tourist Attractions [31]

Based on the list of Bali's attractions, the Travel Design Bali Tourism Destination recommendations for the city are nature, culture, and heritage tourism (see Figure 11). When considered from the location of hotels in Bali's Province, Badung is the most productive district in regards to tourism-related businesses, followed by Denpasar and then Gianyar. These three territories are supported by the presence of tourist sites, natural resources, historic sites and culture, all of which are significant and have a greater degree of popularity than the other territories [31].

## 5. CONCLUSION

Based on the area of origin, domestic tourists visiting Bali are dominated by domestic tourists who come from areas that are geographically relatively close to Bali, namely areas on the islands of Java and Nusa Tenggara. The strategy offered is that promotion outside these areas needs to be increased.

Based on the purpose of their visit, domestic tourists are for vacation or recreation. The strategy offered is to maintain or improve the quality of service, security, and arrangement of holiday or recreation places.

More than half of domestic tourists who visit Bali obtain information from electronic media, and also from family or friends (word of mouth). The strategy offered is that promotion through electronic media needs to be increased, and tourist satisfaction must be maintained and continued in both quality and quantity.

The natural beauty and unique culture of Bali are the types of tourist attractions that are most in demand by domestic tourists visiting Bali. So the strategy offered is the development of tourism with a cultural and environmental perspective which is still very relevant as a reference for tourism development in Bali.

Of the various types of natural tourist attractions in Bali, more than half of domestic tourists visiting Bali stated that they were more interested in the beach/sea, followed by mountains, lakes, and rice fields. So the strategy offered is that the future development of Bali tourism should be more directed at efforts to conserve and organize the coastal/sea, mountains, lakes, and rice fields.

Of the various types of cultural tourism attractions, it turns out that the types of tourist attractions that are most popular are regional arts, traditions/customs, special foods (culinary), architecture, and spas, aromatherapy. The strategy offered is that the development of cultural tourism attractions is more oriented towards the revitalization of these types of cultural tourism attractions.

Apart from sightseeing, the type of tourist activity that many domestic tourists also do while visiting Bali is shopping. The strategy offered is improving service quality, and security and structuring shopping centers that provide local products.

When viewed based on regional distribution, the most popular tourist attractions are dominated by tourist attractions in the South Bali region (Kuta, Pandawa Beach, Tanah Lot, and Garuda Wisnu Kencana). The strategy offered is to increase the competitiveness of tourist attractions in other areas of Bali.

Domestic tourists' expenditure on souvenirs and consumption is relatively high. On that basis, the strategy offered is improving the quality of restaurant businesses, diversifying souvenirs, and empowering craftsmen groups.

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