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Indonesian tourism between international volatility and domestic stability

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ABSTRACT

This study investigates the dynamics of Indonesian tourism from 2000 to 2024, emphasizing the dual roles of international tourist arrivals and domestic tourist trips. The analysis examines how international markets exhibit volatility in response to global crises, whereas domestic tourism demonstrates notable stability and resilience. This research employs official secondary data from Statistics Indonesia, including annual international arrivals, monthly arrivals by nationality, domestic trips by province of origin and destination, and tourism foreign exchange earnings. All datasets were standardized into a panel format and analyzed using descriptive quantitative methods combined with the periodization of crisis and recovery phases. The findings show that international arrivals are highly volatile, with sharp declines during the 2003 SARS episode, the 2008 global financial crisis, and especially the COVID-19 pandemic, with an approximately 80% drop in 2020–2021. In contrast, domestic trips reached 2.9 billion in 2019 and recovered quickly, surpassing 3.3 billion in 2023. Foreign exchange earnings move in tandem with international arrivals, averaging more than US\$10 billion annually before 2014 and falling during crisis episodes. This evidence underscores a structural duality: international arrivals remain crucial for foreign exchange and global positioning, whereas domestic trips provide the backbone of resilience and local economic continuity. Policy implications include diversifying international markets, enhancing domestic tourism infrastructure and connectivity, and embedding the principles of resilient and sustainable tourism in national strategies.

Keywords: Indonesian tourism; international arrivals; domestic trips; foreign exchange; resilience sustainable tourism

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1. INTRODUCTION

Tourism has become an important pillar of Indonesia's economic development. This sector not only plays a role in increasing Gross Domestic Product (GDP), but also in job creation, the distribution of economic benefits to the regions, and the promotion of culture and national identity. The government aims to enhance the economic benefits of tourism, thereby increasing foreign exchange income and integrating tourism into regional economic growth strategies (Setiawati et al., 2023; Azizurrohman et al., 2021). In the last decade, the Indonesian government has placed tourism as one of the priority sectors in the non-oil and gas economic development agenda. External factors such as the global economic crisis, epidemics, and security issues have a significant impact on tourist visitation patterns. Indonesia has experienced various phases of crisis: the Asian economic crisis (1997–1998), terrorist attacks (2002, 2005), the global financial crisis (2008–2009), and the COVID-19 pandemic (2020–2021). Data indicates that international tourist numbers dropped significantly during the pandemic, illustrating the industry's severe vulnerability to external shocks and global crises (Restikadewi et al., 2021; Anele, 2021). All these events affect the flow of international tourists.

Meanwhile, domestic tourists show a different dynamic. International tourism has grown into a major market supporting the tourism sector, with travel scales in the billions. As domestic trips have increased significantly, policy and research should adapt to include this unique market dynamic instead of solely focusing on foreign tourists (Anele, 2021; Setiawati et al., 2023). This indicates that research and policy focus cannot solely be on international tourists; rather, domestic tourists need to be strategically positioned. However, foreign exchange earnings from tourism are directly correlated with the number of international tourist visits. This creates a policy dilemma: how to balance the role of international tourists as foreign exchange contributors with that of domestic tourists as stabilizers of the domestic economy. This creates a nuanced policy dilemma: balancing the economic imperatives of attracting foreign tourists against the necessity of cultivating and supporting the domestic tourism industry (Pertiwi et al., 2021).

Global tourism is one of the fastest-growing sectors in the world, contributing approximately 10% to the global Gross Domestic Product (GDP) before the COVID-19 pandemic (Yamamoto et al., 2021). This sector plays a dual role, serving as both a foreign exchange earner and a catalyst for regional development, but on the other hand, it is highly vulnerable to external shocks. Masrom et al. (2023) emphasise that tourism is highly sensitive to economic crises, natural disasters, and epidemics, making the issue of tourism resilience an increasingly important academic agenda. This vulnerability dynamic can be observed in various global crises that affect tourist movement. The COVID-19 pandemic, for example, is recorded as the biggest crisis in the history of modern tourism, with a decline of over 70% in international arrivals in 2020 (Satyarini et al., 2022). Similar drastic declines have also occurred on a regional scale, such as during the 2003 SARS outbreak in East Asia (Fadhilah et al., 2020) and the 2006 Yogyakarta earthquake (Naimah, 2022). This condition shows that tourism is always the sector most affected early on and often takes the longest time to recover.

In the Indonesian context, the tourism sector has different characteristics than its neighboring Southeast Asian countries. Before the pandemic, tourism's contribution to Indonesia's GDP was only about 4.3%, much lower than Thailand (20%) or Malaysia (12%) (Suroyo & Putra, 2022). Nevertheless, Indonesia has a very large domestic tourist market with billions of trips each year, which can serve as a pillar of economic stability when international tourism declines (Geçikli et al., 2024). This confirms the existence of potential structural strength in the domestic market, which is often overlooked in academic studies. The history of Indonesian tourism development also shows its vulnerability to security issues and global crises. After the reform, government policies tended to focus on international promotion, for example, through the Visit Indonesia Year campaign (Syah et al., 2021). However, these efforts were repeatedly disrupted by the Bali bombings in 2002 and 2005, which seriously impacted the destination's image (Saputri et al., 2022). Under the administration of Joko Widodo, tourism was even designated as a flagship sector through the "10 New Bali" program. However, the COVID-19 pandemic once again shifted policy orientation, from increasing the quantity of visits to quality and sustainability (Marlina et al., 2023).

The literature on Indonesian tourism generally emphasizes the role of foreign tourists as a source of foreign exchange. Tourism revenue is the fourth largest source of state income after oil and gas, coal, and palm oil (Prihantoro et al., 2022). Various studies have shown a strong correlation between the number of international tourist arrivals and foreign exchange earnings (Dewantara et al., 2023; Albasrie et al., 2024). However, this foreign exchange pattern is highly volatile: the early 2000s showed a sharp decline due to the global crisis and security issues, while the 2010s saw a recovery as international tourist visits increased (Mardianto et al., 2019). Although relatively rarely studied, domestic tourists play a significant role in supporting the tourism sector during crises. Nugroho Subrata et al. (2023) emphasize that the domestic market not only ensures the sustainability of the tourism industry but also strengthens the local economy through contributions to micro, small, and medium enterprises (MSMEs), and community-based services (Iroham et al., 2025). A report by the Ministry of Tourism shows that domestic tourist spending at the regional level can surpass the contribution of international tourists (Lestari et al., 2022). This fact became even more evident during the pandemic, when international travel restrictions made domestic tourist movement the backbone of many destinations (Helmy et al., 2022).

The framework of tourism resilience then became a key concept for understanding how destinations can survive, adapt, and recover from crises (Hanjaya & Putri, 2025). In the Indonesian context, the strength of domestic tourism during the pandemic highlights the opportunity to implement a dual-market approach by integrating international and domestic tourists into tourism development strategies. Recent literature confirms that tourism recovery after a crisis is highly dependent on the ability to rebuild tourist confidence, and Indonesia's capacity to leverage its large domestic tourist base is an important asset for creating a more resilient tourism model (Wulandari et al., 2023).

This study contributes to the tourism literature by integrating analyses of international and domestic tourists and foreign exchange over a long period (2000–2024). Analyzing these trends within a phased historical context will shed light on how both domestic and international tourist flows adapt to economic realities (Anele, 2021; Nugraha & Naylah, 2023). Employing a quantitative descriptive approach and phase periodization, this research provides a comprehensive understanding of the vulnerability and resilience of Indonesian tourism. This can enable Indonesia's tourism sector to better navigate future crises while maximizing its contribution to the national economy and cultural heritage (Mahmudin et al., 2024; Fu, 2024).

This study aims to provide a comprehensive understanding of Indonesian tourism dynamics by highlighting the dual roles of international and domestic tourists throughout the period from 2000 to 2024. First, the research aims to examine the long-term trends of international tourist arrivals from 2002 to 2023 and domestic tourist travel from 2017 to 2023, allowing us to see how these two markets have developed over different time periods and have been influenced by global and domestic contexts. Furthermore, this study aims to analyze tourism foreign exchange earnings from 2000 to 2014, emphasizing its relationship with fluctuations in international tourist arrivals. This analysis is important because tourism foreign exchange is a direct indicator of the sector's contribution to the national economy, but it also shows its vulnerability to global crises. Additionally, this study aims to identify patterns in Indonesian tourism across six major historical phases: early pre-crisis (2000–2004), global pre-crisis (2005–2008), global post-crisis (2009–2013), pre-pandemic (2014–2019), COVID-19 pandemic (2020–2021), and post-pandemic recovery (2022–2024). This periodization was chosen to capture the close link between tourist movements and cycles of crisis and recovery. Finally, this research aims to formulate policy implications that can strengthen the resilience of Indonesia's tourism sector in the future through market diversification strategies, strengthening domestic tourism, and implementing the principles of resilience and sustainability as the foundation for tourism development.

2. METHOD

This study fully utilizes official secondary data obtained from the Indonesian Central Bureau of Statistics' tourism statistics publications, which are freely accessible on its website. Three main types of data were analyzed. First, data on foreign tourists covering the period from 2002 to 2023 are presented

annually by country of residence, as well as monthly data by nationality for the period 2017–2024. Second, data on domestic tourists are available in three forms: national data (2022–2024), data by province of origin (2017–2023), and data by province of destination (2019–2023). Third, data on foreign exchange earnings from tourism are only available up to 2014, covering the period 2000–2014. These three types of data provide a comprehensive overview of the flow of international and domestic tourists and the contribution of tourism to the national economy. Data processing was performed in stages to ensure consistency and comparability across periods. Each raw data file, mostly in Excel format, has a different structure. Some files list the title twice on the first line, whereas others include a total aggregate within the data rows. Therefore, the first step is data normalization by cleaning empty rows, removing aggregate rows, and merging headers so that they can be processed further.

The second step involved transforming the data into a panel format. At this stage, each table is converted into a structure with time and entity index. For international tourist data, the panel format is formed based on a combination of year and country, with the main variable being the number of visits. For domestic tourist data, the panel format is formed based on a combination of year and province, both as the province of origin and the province of destination, with the main variable being the number of trips taken. Meanwhile, foreign exchange data is formed in a year format as an index and revenue in millions of US\$ as the main variable. This transformation to a panel format is important because it facilitates longitudinal analysis over time and allows for comparisons between data categories. The third step was to integrate the data into a single master table. This table includes the total annual international tourist variable, the total monthly international tourist variable, the total domestic tourist trips by origin, the total domestic tourist trips by destination, and the foreign exchange earnings. Thus, every year from 2000 to 2024 has a possible cross-variable representation, although with varying degrees of completeness.

In the analysis process, this study also divides the data into six historical phases: early pre-crisis (2000–2004), global pre-crisis (2005–2008), global post-crisis (2009–2013), pre-pandemic (2014–2019), COVID-19 pandemic crisis (2020–2021), and post-pandemic recovery (2022–2024). This periodization aims to capture the structural dynamics of tourism, which are closely linked to global and domestic events, so that emerging trends are understood as statistical fluctuations and as a reflection of the historical context.

However, the data used in this study have certain limitations. Foreign exchange revenue data is only available up to 2014, making it impossible to directly assess the impact of the COVID-19 pandemic on tourism foreign exchange. Domestic tourist travel data is also relatively new, with national records only available since 2022, origin province data only available since 2017, and destination province data only available since 2019. This means that the period before 2017 can only be analysed using international tourist and foreign exchange data. Additionally, there are indications of a methodological change in the domestic travel survey, as evidenced by the significant jump in travel figures between 2018 and 2019. This change has the potential to cause inconsistencies, so interpretation must be done carefully.

Nevertheless, the main strength of this research lies in its ability to integrate available data into long-term macro analysis. Instead of emphasising absolute numbers each year, this study focusses more on structural patterns and trends. A quantitative descriptive analysis approach is used to present the dynamics of international tourists, domestic tourists, and foreign exchange, both separately and in an integrated manner. Long-term trend analysis is then enriched with periodisation interpretation, so that the dynamics of Indonesian tourism can be understood as part of a recurring cycle of crisis and recovery. With this approach, even though the data is not completely complete or consistent, the research is still able to provide a comprehensive overview of the dual role of tourism in Indonesia's development, namely as a source of foreign exchange through international tourists and as a pillar of domestic economic resilience through domestic tourists.

3. RESULT AND DISCUSSION

3.1. Long-term trends in international and domestic tourism

Long-term analysis shows that the number of international tourists visiting Indonesia has fluctuated quite sharply. Figure 1 shows that in the early 2000s, international tourist arrivals remained stable at around five million per year. A significant decline occurred in 2003, coinciding with the SARS epidemic in Asia and the lingering effects of the 2002 Bali bombing tragedy. This decline has impacted Indonesia's image as a safe tourist destination (Setiawati et al., 2023). In 2005, there was a decline again due to terrorist attacks that caused concern among tourists (Azizurrohman et al., 2021), but since 2009, the number of international tourist visits has gradually recovered. This condition aligns with the government's efforts to boost tourism promotion through the "Visit Indonesia Year" campaign and enhance safety at tourist destinations (Restikadewi et al., 2021). See Figure 1

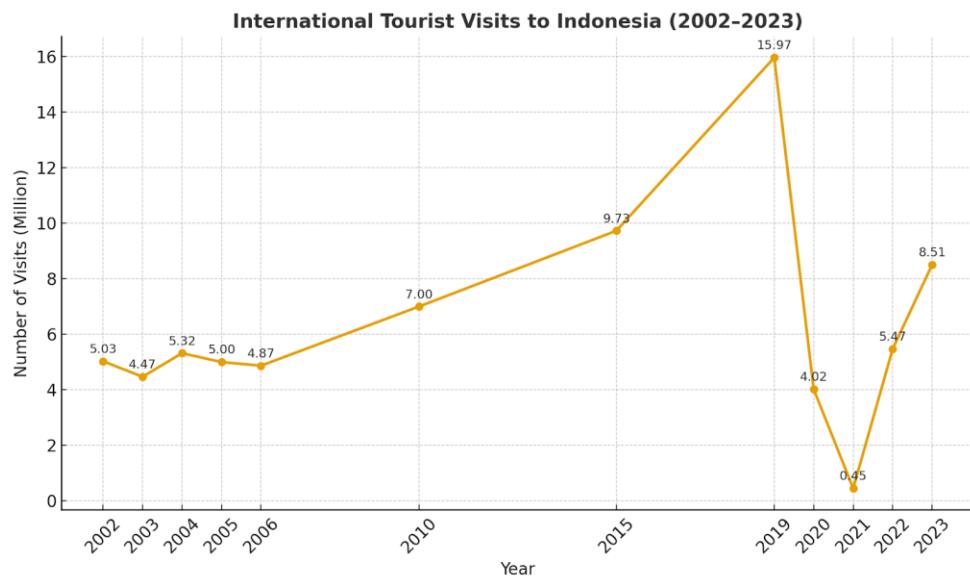


Figure 1. Number of Visit International Tourists (2002–2023)

Source: Processed data from BPS (2002–2023)

The peak of international tourist visits occurred in 2019, with a total of nearly 16 million visits. This peak in international visits signifies Indonesia's success in attracting international tourists (Anele, 2021). However, the COVID-19 pandemic in 2020 caused an extreme decline: the number of international visits plummeted by over 80%, and in 2021 only hundreds of thousands of visits were recorded. This condition illustrates the severe impact of the pandemic on the tourism sector in Indonesia (Pertiwi et al., 2021). In 2022 and 2023, data shows a rebound, although the numbers are still far from pre-pandemic levels. This rebound is influenced by the recovery measures implemented by the government and the tourism sector to attract international tourists back, including reopening for international travel and implementing health protocols (Sugiarto et al., 2024; Nugraha & Naylah, 2023). This finding indicates that the international tourism sector is highly vulnerable to external factors, ranging from security issues to global pandemics.

Unlike international tourists, Figure 2 shows that domestic tourist travel is on a much larger scale and relatively more stable. Since being systematically recorded for the first time in 2017, the number of domestic trips has reached hundreds of millions and soared dramatically to nearly three billion trips in 2019. Although the pandemic limited mobility in 2020, the number of domestic trips remained in the billions, proving the high resilience of the domestic tourism market. These data demonstrate the significant potential and resilience of the domestic tourism sector, especially during difficult times such as the COVID-19 pandemic, which restricted mobility in 2020 (Setiawati et al., 2023). 2023 set a new record with

over 3.3 billion trips, making domestic tourists the main driver of Indonesia's tourism recovery post-pandemic (Restikadewi et al., 2021). See Figure 2

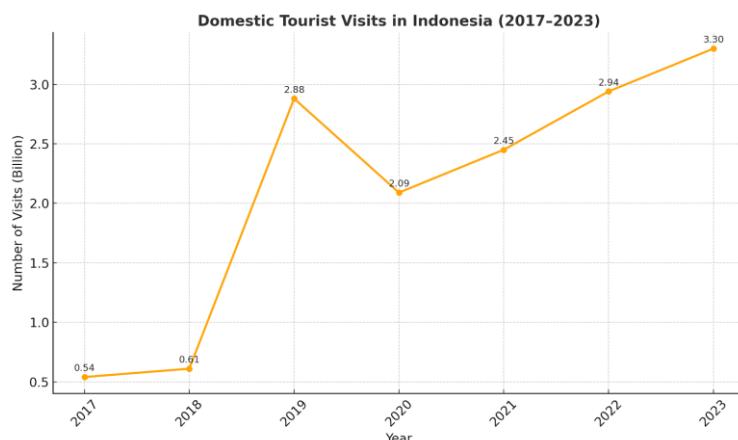


Figure 2. Number of Visit Domestic Tourist (2017–2023)

Source: Processed data from BPS (2017–2023)

The significantly larger scale of domestic tourist travel compared to international tourists highlights the importance of making the domestic market a strategic focus for tourism development, especially during crises. Developing domestic potential will not only provide economic benefits but also strengthen cultural identity and local communities (Pertiwi et al., 2021).

3.2. Tourism foreign exchange earnings and their relationship with international tourist arrivals

Tourism foreign exchange earnings show a pattern that aligns with international tourist arrivals (See Table 1). In 2000, tourism revenue reached US\$1.2 billion, but decreased to US\$7.8 billion in 2003 due to the impact of security issues and the SARS epidemic. Recovery was seen in the following decade, with average revenue exceeding US\$0 billion after the global crisis. This period was characterised by effective promotional initiatives, improved safety measures, and the overall enhancement of Indonesia's tourism infrastructure (Restikadewi et al., 2021; Anele, 2021).

Table 1. Indonesian Tourism Foreign Exchange Earnings

Tahun	Year Earnings (US\$ billions)
2000	11,25
2001	10,75
2002	8,33
2003	7,87
2004	9,59
2010	10,00
2014	11,17

Source: Processed data from BPS (2017–2023)

Unfortunately, official data is only available up to 2014, making it impossible to measure the direct impact of the COVID-19 pandemic on foreign exchange earnings. However, the pattern observed strengthens the close relationship between the number of international tourists and foreign exchange contributions. However, it can be inferred from available statistics that the pandemic caused a catastrophic decline in international tourist visits, leading to severe reductions in foreign exchange earnings (Nugraha & Naylah, 2023).

The relationship between international tourist arrivals and foreign exchange contributions to the economy underscores the vital role that tourism plays in Indonesia's economic framework. The tourism sector's capacity to generate revenue through foreign exchange remains one of its most critical contributions to national income. This dynamic highlights the importance of preparing strategic frameworks to enhance resilience in the tourism sector amid crises (Sugiarto et al., 2024; Mahmudin et al., 2024).

3.3. Phases and Patterns of Indonesian Tourism

To understand the dynamics of Indonesian tourism over the long term, the research data is divided into six historical phases in Table 4, reflecting the close link between tourism and global as well as domestic crisis cycles. The first phase was the pre-crisis period from early 2000 to 2004, when the number of foreign tourists remained relatively stable at around five million visits per year. At this phase, although foreign exchange earnings tend to fluctuate due to the impact of security issues and regional epidemics, their value remains high and demonstrates the importance of the tourism sector as a contributor to national foreign exchange. This phase highlights the tourism sector's role as a significant contributor to national foreign exchange, despite facing challenges (Setiawati et al., 2023; Azizurrohman et al., 2021). The second phase, pre-global crisis 2005–2008, was characterised by moderate growth in the number of international tourist arrivals. Foreign exchange earnings during this period began to rise, reflecting the ongoing efforts to stabilise and promote the industry to a global audience (Restikadewi et al., 2021; Anele, 2021).

Entering the third phase, which is the post-global crisis period of 2009–2013, there was a significant surge in the number of international tourists. The recovery of the global economy after the 2008 crisis had a positive impact on visitor arrivals, and Indonesia's tourism revenue peaked during this period. As international confidence in Indonesia's safety grew, tourism foreign exchange earnings peaked, demonstrating the positive correlation between improved economic conditions and tourist arrivals (Pertiwi et al., 2021; Nugraha & Naylah, 2023). The fourth phase is the pre-pandemic period of 2014–2019, when Indonesian tourism reached its highest momentum. International tourist arrivals peaked at nearly 16 million in 2019, while domestic tourist numbers began to be systematically recorded and showed a travel scale of almost three billion in the same year. This dual growth exemplified the burgeoning importance of both international and domestic tourists to the national economy (Sugiarto et al., 2024; Mahmudin et al., 2024).

The fifth phase was the COVID-19 pandemic crisis period from 2020 to 2021. During this period, the number of international tourists plummeted drastically due to global mobility restrictions, dropping by over 80% compared to the previous period. Despite the catastrophic effects on foreign tourism, domestic travel remained at high levels, demonstrating the resilience of the domestic tourism market as a crucial stabilising force for the industry (Fu, 2024; Yamamoto et al., 2021).

Table 2. Summary of Tourism Indicators by Phase (2000–2024)

Phase	Foreign Tourists (millions)	Domestic Tourists (millions)	Foreign Exchange (US\$ billions)
Pre-Early Crisis (2000–2004)	5	n/a	9,6
Pre-Global Crisis (2005–2008)	5,4	n/a	10,8

Post-Global Crisis (2009–2013)	7–9	n/a	16,7
Pre-Pandemic (2014–2019)	10–16	3	n/a
Pasca-Pandemic (2020–2021)	0,45–4,0	2,2	n/a
Recovery (2022–2024)	5–8	2,9–3,3	n/a

Source: Processed data from BPS and Bank Indonesia (2000-2024)

Based on [Table 2](#), the final phase is the post-pandemic recovery from 2022–2024, when international tourist arrivals began to rebound, reaching a record 5.47 million visits in 2022 and 8.51 million in 2023, while domestic tourism set a new high of over 3.3 billion trips. This dual recovery phase illustrates the contrasting trends in Indonesian tourism, affirming the role of international tourists, who remain sensitive to global shocks, as well as the stability provided by domestic tourists in supporting sector resilience ([Masrom et al., 2023](#); [Satyarini et al., 2022](#)).

3.4. Resilient and Sustainable Tourism in Indonesia

The data analysis results show fundamental differences between international and domestic tourists. International tourists play a significant role in contributing to foreign exchange earnings, but they are highly vulnerable to external factors such as security and pandemics ([Setiawati et al., 2023](#); [Azizurrohman et al., 2021](#)). When incidents like terrorism occur or global crises like COVID-19 strike, the number of international tourist arrivals can experience a drastic decline, negatively impacting foreign exchange earnings ([Restikadewi et al., 2021](#)). Conversely, domestic tourism is much more stable, larger in scale, and serves as a buffer for the tourism sector during crises. During the pandemic, despite mobility restrictions, the number of domestic trips remained high, indicating the resilience of the domestic tourism market as a buffer for Indonesia's tourism sector during the crisis ([Anele, 2021](#); [Pertiwi et al., 2021](#); [Nugraha & Naylah, 2023](#)).

Foreign exchange dependence on international tourists creates a policy dilemma. The government needs to encourage the recovery of international markets to maintain foreign exchange contributions, while simultaneously strengthening the domestic market as a foundation for sustainability. This aligns with the resilient tourism approach ([Mahmudin et al., 2024](#); [Fu, 2024](#)), where tourism is not only dependent on the global market but is also supported by a strong domestic base.

Data on domestic tourists provides a spatial overview, both from the perspective of the province of origin and the province of destination. Data shows that densely populated provinces like West Java, Central Java, and East Java are the main contributors to domestic travel. In 2019, for example, West Java contributed over 500 million trips, followed by East Java and Central Java. The dominance of these provinces reflects two things: first, their high population, which naturally creates a large domestic tourist base; and second, the role of metropolitan areas like Jabodetabek as both centres of mobility and origins of travel to various regions. One solution that can be considered is improving the experience and satisfaction of domestic tourists, which can encourage them to travel more frequently and spend more money at local destinations. This approach aligns with findings indicating that domestic tourist satisfaction significantly influences their intention to return ([Yamamoto et al., 2021](#); [Masrom et al., 2023](#)). From a destination perspective, provinces with popular destinations like Bali, West Java, Central Java, and Yogyakarta consistently remain travel magnets. Bali, despite its small geographical size, records a high number of domestic trips thanks to its status as a national tourism icon. DI Yogyakarta shows a similar pattern, with cultural, historical, and educational attractions. Additionally, provinces with outstanding natural destinations such as North Sumatra (Lake Toba) and West Nusa Tenggara (Lombok) also recorded significant growth in the number of trips.

The spatial distribution of domestic travel in Indonesia shows a clear pattern of centralisation in certain destinations. Most domestic tourist trips take place on the islands of Java and Bali, while other provinces, such as Sumatra and parts of Nusa Tenggara, also make significant contributions. For many tourists, this trend can be understood through various factors, including better accessibility, more established tourism infrastructure, and effective branding strategies by the destination (Setiawati et al., 2023; Azizurrohman et al., 2021).

However, this concentration pattern poses challenges, particularly in terms of interregional tourism disparities. Provinces in Kalimantan, Maluku, and Papua, for example, are relatively behind in attracting domestic tourists compared to Java and Bali. This issue is exacerbated by a lack of adequate infrastructure and less effective promotion in those areas (Restikadewi et al., 2021; Anele, 2021). When transportation modes and tourism facilities in these regions are still underdeveloped, tourists tend to choose destinations that are more easily accessible and widely offered, creating disparities in economic development between regions (Pertiwi et al., 2021; Nugraha & Naylah, 2023). Table 3 provides a comparison of domestic travel origin and destination provinces in 2019, which was the peak before the COVID-19 pandemic, and shows these distribution patterns more clearly:

Table 3. Main Origin and Destination Provinces for Domestic Travel (2019)

Rank	Province of Origin (millions of trips)	Province of Destination (millions of trips)
1	West Java (520)	West Java (430)
2	East Java (470)	Bali (410)
3	Central Java (450)	Central Java (400)
4	DKI Jakarta (300)	DI Yogyakarta (350)
5	North Sumatera (250)	East Java (330)

Source: Processed BPS data (2019)

From Table 3, it can be seen that provinces with large populations are not only the origin of travel but also the destination, although the motivation for travel may differ. West Java, for example, is not only the largest origin of travel but also a destination thanks to its natural tourist attractions and proximity to Jakarta. Bali and Yogyakarta remain consistent as premier national destinations, demonstrating the strength of the established tourism branding. This distribution pattern highlights the need for strategic attention and development to reduce inequality in the tourism sector, particularly by improving infrastructure and accessibility to less developed areas, enabling them to participate more actively in the growth of the national tourism sector (Sugiarjo et al., 2024; Mahmudin et al., 2024). Quantitative analysis also shows a very large scale gap between international and domestic tourists. International tourists are measured in millions of visits, while domestic tourists are measured in billions of trips. In 2019, for example, Indonesia received nearly 16 million international tourist visits. At the same time, the number of domestic tourist trips reached 2.88 billion. This means that the scale of domestic travel is more than 180 times the number of foreign tourist visits. This gap became even more pronounced during the pandemic. In 2021, there were only 0.45 million international tourist visits, but domestic tourist travel still reached 2.45 billion. In other words, the domestic market became the main saviour of the tourism sector. Table 4 summarises the quantitative comparison of international and domestic tourists in key years.

Table 4. Comparison of International and Domestic Tourists

Year	International Tourist (millions of trips)	Domestic Tourist (millions of trips)	Ratio
2017	14,0	0,54	39 : 1
2019	15,9	2,88	181 : 1
2021	0,45	2,45	5444 : 1
2023	8,5	3,30	388 : 1

Source: Processed BPS data (2017–2023)

Table 4 shows that although international tourists are more often highlighted for their contribution to foreign exchange, domestic tourists are far more dominant in terms of the volume of activity. Even under normal conditions, the number of domestic tourist trips is hundreds of times greater than that of international tourists. This fact underscores the importance of a tourism strategy that not only focusses on recovering international markets but also on strengthening and diversifying domestic markets.

This analysis also shows that international and domestic tourists have different functions within the Indonesian tourism ecosystem. Foreign tourists serve as a source of foreign exchange and a tool for cultural diplomacy (Anele, 2021), while domestic tourists stabilise the tourism sector and drive the local economy through direct consumption. The development of domestic tourism not only supports local economic growth but also encourages the consumption of goods and services produced by local communities, such as MSME (Micro, Small, and Medium Enterprises) products and tourism services. Thus, balanced strengthening of both is key to the sustainability of Indonesia's tourism sector. With these two distinct roles, it is crucial for Indonesian tourism policy to integrate a balanced approach in the development and promotion of both market segments. Strengthening infrastructure capacity, human resource training, and targeted promotion must be undertaken to support both market segments (Sugiarto et al., 2024). Both can be mutually beneficial, where an increase in domestic tourists can help offset fluctuations in international tourist arrivals, and conversely, international tourist visits can enrich the experience and knowledge of the domestic market.

The distribution of domestic and international tourist travel shows an uneven spatial pattern in Indonesia. Most tourism activities are still concentrated on the islands of Java and Bali, with additional growth pockets in North Sumatra, South Sulawesi, and West Nusa Tenggara. This concentration has significant implications for economic inequality between regions. Bali, for example, is the most obvious example of a region whose economy is heavily reliant on tourism. Before the pandemic, more than half of Bali's revenue came from the tourism sector and its derivatives. When the COVID-19 pandemic halted the flow of foreign tourists, Bali's economy experienced a sharp contraction in 2020. This condition reflects the direct impact of the loss of tourism revenue (Anele, 2021; Pertiwi et al., 2021). This decline illustrates how vulnerable a regional economy is when it relies too heavily on a single sector, and emphasises the importance of economic diversification to reduce future risks.

Conversely, the provinces in Java exhibit a more balanced character. West Java and Central Java, for example, are both the origin and destination for a large number of domestic tourist trips. This is related to population density, the attractiveness of cultural and natural tourism, and transportation accessibility. Domestic tourism in this region not only supports the tourism sector but also strengthens the local economy through consumption in the hospitality, culinary, transportation, and MSME sectors. Thus, tourism plays a dual role: driving the regional economy while mitigating the impact of the global recession. Province outside Java and Bali, especially in Kalimantan, Maluku, and Papua, face different challenges. Despite having significant natural potential—for example, tropical forest ecotourism, marine tourism, and cultural diversity—the number of trips to these areas is relatively small. Infrastructure barriers,

transportation limitations, and a lack of promotion mean that destinations in eastern Indonesia are not yet able to compete with destinations in Java and Bali. This disparity not only impacts the distribution of tourism revenue but also exacerbates regional development gaps.

From a national economic perspective, the dominance of Bali and Java in tourism is also reflected in their contribution to foreign exchange earnings. The majority of foreign tourists visit Bali, Jakarta, Yogyakarta, and Batam. This pattern concentrates tourism revenue in specific corridors, while other areas still rely on the domestic tourist market. Thus, there is a policy dilemma: relying on flagship destinations to increase foreign exchange, but at the same time having to promote equity by developing alternative destinations outside of Bali and Java. [Table 5](#) illustrates a comparison of the main regions' contribution to tourism activities.

Table 5. Spatial Distribution of Indonesian Tourism

Region	International Tourists (proportion %)	Domestic Tourists (proportion %)	Economic Implications
Bali	>35%	10%	Highly dependent on tourism, foreign exchange dominant
Java	>40%	>60%	Center of domestic mobility, large tourism consumption
Sumatera	15%	15%	High potential (Lake Toba, Batam), still limited
Sulawesi & Nusa Tenggara	8%	10%	Cultural & natural potential, beginning to develop
Kalimantan, Maluku, Papua	<5%	<5%	Great potential, but limited infrastructure & accessibility

Source: Processed data from BPS and Ministry of Tourism and Creative Economy (2022)

[Table 5](#) confirms a strong concentration in Bali and Java, for both international and domestic tourist markets. Meanwhile, other areas are still lagging behind, despite having significant potential. This spatial inequality has two consequences: first, the uneven distribution of the economic benefits of tourism across regions; second, the increasing vulnerability of areas that are overly reliant on tourism, as is the case with Bali. From a policy perspective, this spatial-economic analysis confirms the need for a destination decentralisation strategy. The development of alternative destinations such as Lake Toba, Mandalika, Labuan Bajo, Likupang, and Borobudur, which is part of the "10 New Balis" program, is an important step because this program aims to diversify tourism revenue sources and reduce dependence on Bali as the sole major tourist destination. However, for this strategy to succeed, it requires infrastructure support, integrated promotion, and the empowerment of local communities so that the benefits of tourism can be felt more evenly across all regions of Indonesia.

Tourism is a sector highly vulnerable to external shocks, such as financial crises, natural disasters, epidemics, and geopolitical issues, which can suddenly alter tourist flows. During a period of unexpected growth in the tourism industry, resilience has become a key element for maintaining sustainability. Tourism resilience is defined as a destination's ability to withstand, adapt to, and recover from various external shocks, both quickly and sustainably. Research by [Wibowo and Hariadi \(2022\)](#) indicates that tourism in Indonesia, particularly in the context of the COVID-19 pandemic, faces various challenges that necessitate the development of a strong resilience model for tourist destinations. In this context, socio-ecology becomes an important element because local communities must remain able to maintain their well-being even if tourism conditions are affected. This aligns with the findings identified by [Cheer et al. \(2020\)](#), who emphasised the need to maintain a balance between ecological and social functions in sustainable tourism

development. Furthermore, the local community plays a central role in building resilience in the tourism sector. It has been proven that individuals with strong place attachment demonstrate better adaptive capacity, thereby strengthening community resilience (Guo et al., 2018). This aligns with research conducted by Yang and Kim (2023), who proposed a framework on how community resilience should be prioritised in efforts to develop sustainable tourism, particularly in the face of disasters and crises.

Tourism resilience is not limited to economic recovery, but also includes social and environmental aspects. Wang et al. (2022) argue that cities with high levels of resilience tend to demonstrate flexibility and the ability to cope with unexpected challenges, while ensuring quality tourism development. Research on network behaviour in the tourism business emphasises the importance of strong internal relationships between managers and staff in enhancing the resilience of the tourism business (Sulhaini et al., 2023). From a policy perspective, it is important for stakeholders to integrate resilience management strategies into their action plans. Data-driven management and appropriate technological adaptation can help tourism businesses prepare for potential future shocks (Lamhour et al., 2023). This aligns with research stating that collaboration between various stakeholders and strengthening community capacity are necessary to build a resilient and sustainable tourism system (Cherian & Natarajamurthy, 2024).

In the case of Indonesia, the analysed data shows that domestic tourists serve as the main buffer supporting the tourism sector when international tourist arrivals collapse due to a crisis. The COVID-19 pandemic is the most striking example: while international tourist arrivals decreased by over 80% in 2020 and 2021, domestic travel remained at over two billion. This number is not just a statistic, but a real reflection of the resilience of Indonesian society in maintaining domestic movement despite international travel restrictions.

The role of domestic tourists aligns with resilience theory, which emphasises the importance of market diversification. Tourism destinations that rely on a single market source will be more vulnerable, while destinations with diverse markets will be more resilient. Indonesia, with a population of over 270 million, has a structural advantage in the form of a very large domestic market. This distinguishes Indonesia from destinations heavily reliant on international tourists, such as the Maldives or Fiji, whose economies are almost entirely supported by international visitors and fell into a deep economic crisis during the pandemic. Indonesia's tourism resilience is also related to social and cultural dimensions. Domestic tourists travel not only for recreation but also for social, religious, and cultural purposes, such as returning home for Eid, pilgrimage tourism, and family trips. This character makes domestic travel relatively more stable because tourism motivation doesn't entirely depend on global conditions, but is instead embedded in society's social cycles. Thus, domestic tourism in Indonesia possesses elements of cultural resilience that strengthen the sector's overall resilience.

However, domestic tourism-based resilience also has limitations. First, although the number of domestic tourist trips is very large, their direct contribution to national foreign exchange is relatively small compared to international tourists. Second, domestic tourist consumption has a greater impact on the local economy, so its role in the national balance of payments is not as strong as the international market. Third, without adequate infrastructure and governance support, the surge in domestic travel could actually put pressure on the environment, such as over-tourism in certain areas. Thus, Indonesia's tourism resilience can be understood as a form of dual resilience: on the one hand, domestic tourists support the sector's stability during crises; on the other hand, international tourists remain key contributors to foreign exchange and international diplomacy. The integration of these two dimensions, domestic and international, is a concrete application of the resilient tourism concept in the Indonesian context.

The COVID-19 pandemic experience not only brought significant shocks to the tourism sector but also opened up space for reflection on the future direction of tourism development. Before the pandemic, tourism policy in Indonesia was heavily focused on increasing the number of foreign tourist arrivals, reflected in the ambitious target of 20 million visits in 2019. However, the global crisis that halted international mobility showed that solely focussing on the quantity of visits is not resilient enough to withstand uncertainty. Post-pandemic, global and national discourse began to shift towards sustainable tourism, which is a tourism model that balances economic, social, and environmental interests.

The United Nations World Tourism Organisation in 2021 emphasises that tourism recovery must be built on the principles of sustainability, with a focus on low-carbon tourism, nature conservation, and the empowerment of local communities. This shift is also evident in Indonesian government policies, for example, through the program to develop five super-priority destinations (Lake Toba, Borobudur, Mandalika, Labuan Bajo, and Likupang), which not only emphasises infrastructure aspects but also the sustainability of the tourism ecosystem. In the domestic context, tourism sustainability is closely related to the dynamics of domestic tourists. The scale of domestic travel, reaching billions annually, poses a significant challenge to environmental carrying capacity. Popular areas like Yogyakarta, Bandung, and Bali are facing overtourism issues, including congestion, pressure on water resources, and environmental degradation. If not managed sustainably, the surge in domestic travel can actually create new vulnerabilities for tourism itself. Conversely, the positive potential of sustainable tourism emerges through the development of community-based tourism.

During the pandemic, many local tourism villages and ecotourism sites actually thrived because they were supported by the domestic market. This phenomenon shows that sustainability is not only understood from an environmental perspective, but also from the standpoint of social inclusion and economic empowerment of local communities. Thus, the pandemic became a momentum for Indonesia to revamp its tourism model from simply chasing visitor numbers towards sustainable quality tourism experiences. Going forward, the integration of resilience and sustainability will be the main foundation for Indonesia's tourism development. Resilience ensures tourism can withstand global shocks, while sustainability guarantees that tourism growth doesn't sacrifice the environment and the social well-being of future generations.

4. CONCLUSION

International tourism has proven to be highly volatile and susceptible to external shocks. The early 2000s were marked by the impact of security and epidemic issues, while the 2008 global crisis and the COVID-19 pandemic highlighted the fragility of dependence on international markets. Although the number of visits peaked in 2019 with nearly 16 million tourists, this figure plummeted in 2020–2021 before starting to recover since 2022. This finding confirms that international tourists play an important role in foreign exchange, but cannot be the sole foundation for tourism resilience. Meanwhile, domestic tourists are the main support for the tourism sector. The scale of domestic travel reaches billions annually, far exceeding international tourism, which is only in the millions. During the pandemic, despite mobility restrictions, domestic travel remained high, with over two billion trips taken in 2020–2021. This shows that domestic tourists serve as an economic buffer, ensuring the sustainability of the tourism sector while also strengthening local consumption. Thus, the development of domestic tourism is not only relevant as a recovery strategy, but also as a foundation for long-term resilience. Tourism foreign exchange earnings are highly dependent on international tourists. Data from 2000–2014 show that foreign exchange follows the fluctuation pattern of international tourist arrivals, with a sharp decline during crisis periods and recovery during stable phases. The limited data after 2014 indeed prevent a full analysis of the pandemic's impact on foreign exchange, but historical trends indicate a strong correlation. Thus, the strategy for increasing foreign exchange must still rely on the recovery of international markets.

Based on empirical findings and conceptual analysis, there are several policy implications that the Indonesian government needs to consider when formulating the direction of tourism development. First, there needs to be diversification of the international tourist market to reduce vulnerability to global shocks. Dependence on specific markets, such as China, Japan, and Australia, makes Indonesian tourism highly vulnerable when those countries experience crises. Diversifying into ASEAN, European, Middle Eastern, and Indian markets can enhance Indonesia's international tourism resilience. Strengthening domestic tourism must be made a primary strategy. The government needs to improve transportation infrastructure, inter-provincial connectivity, and promote lesser-known local destinations. Additionally, supporting tourism MSMEs, tourism villages, and community-based ecotourism will ensure that the benefits of tourism are more evenly distributed across various regions.

Tourism development also needs to be directed towards a sustainable tourism model. The significant increase in travel, both by international and domestic tourists, puts pressure on the environment, particularly in popular destinations like Bali and Yogyakarta. Carrying capacity-based management, environmental conservation, and low-carbon tourism are key to ensuring long-term sustainability. Resilient tourism strategies are also important for dealing with sudden shocks such as pandemics or global crises. This can be achieved through an early warning system, diversification of tourism products, and protection mechanisms for tourism business operators. The government's role in building an adaptive governance framework is also crucial to ensure a rapid response to crises. The spatial-economic implications indicate the need for decentralisation of destination development. Currently, tourism activities are still concentrated in Bali and Java, while other regions have great untapped potential. The "10 New Balis" program is a good first step, but it needs to be strengthened with infrastructure investment, global promotion, and the active participation of local communities.

Ethical Approval

Not applicable; the data used in this article are from dynamic tables freely available at <https://www.bps.go.id/id/query-builder>

Informed Consent Statement

Not applicable; I used published secondary data from www.bps.go.id.

Informed Consent Statement

Not applicable.

Authors' Contributions

Not applicable.

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