

ARE THEY STILL TRAVELING TO BALI FOLLOWING THE COVID-19 PANDEMIC?

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ABSTRACT

The world has been significantly impacted by the COVID-19 epidemic, particularly in the travel and tourism sector. Even after the Covid-19 outbreak stopped, the effects in various forms continued to recur. The market segment is also affected by post-pandemic developments in the tourism industry. Geographically, changes in tourist market sectors might present new perspectives and opportunities or new challenges and risks to a tourism destination if it does not adjust quickly to these changes. This pilot study attempts to identify shifts in traveler market patterns that arise in Bali as a global travel destination following the pandemic. It illustrates how changes in market segments have occurred in this destination through tourist arrival data recorded by the National Statistics Bureau. A quantitative comparison analysis approach to the number of tourist visits reveals that there have been changes in nearly every region. The number of visitors to Bali has changed significantly in each region's tourist-generating countries. This study demonstrates that, due to various circumstances, market segment shifts have happened considerably in practically every region and every country. This study offers a crucial overview for formulating strategies and policies for growing the tourism industry after the COVID-19 outbreak.

KEYWORDS: Traveling, Post-Pandemic, Tourism Destination, Tourist Market, Tourism Trends

INTRODUCTION

One of the sectors most badly impacted by the COVID-19 outbreak is tourism (Becken et al., 2021; Ntounis et al., 2022; Koh, 2020; Sharma et al., 2021; Ianioglo & Rissanen, 2020; Cai et al., 2021; Zheng et al., 2022; Zenker et al., 2021; Benjamin et al., 2020; Yin & Ni, 2020). Because all nations impose social restrictions and forbid tourists from traveling between regions and abroad, domestic and international tourism has drastically declined (Pambudi et al., 2020). Significant drops in hotels, entertainment, cruise lines, and other associated industries occurred. It is unknown how this crisis will affect society in the long run (Assaf et al., 2022). The ability to effectively position oneself in the post-COVID-19 age and pave the route for continued competitiveness and growth will only be available to locations and hotels that comprehend the new equilibrium that makes tourism possible (Kock et al., 2020).

The COVID-19 pandemic has caused a global phenomenon of tourism stagnation, which has drawn the attention of numerous researchers who have studied this issue. Some of these researchers have examined the impact of COVID-19 on the tourism industry (Skare et al., 2021) post-COVID-19 opportunities for regions experiencing overtourism and no tourism (Koh, 2020);

and post-COVID-19 tourism industry recovery (Yu et al., 2023; Shin et al., 2022; Ćorak et al., 2020; Sharma et al., 2021; Y. Liu et al., 2021). Numerous studies address how the tourism industry is recovering now that the pandemic has ended and things are returning to normal (Fotiadis et al., 2020; Kanom et al., 2020; Zhang et al., 2021). Nevertheless, scholars have not focused on the trend of post-pandemic tourist visitation. In order to implement policies, particularly those pertaining to marketing tourist destination areas, that will be able to offer significant benefits for both tourists and the local community at tourism destinations, it is actually crucial to analyze trends in tourist visits to destinations following COVID-19 (Stankov et al., 2020).

Bali is a well-known tourism destination around the world, serving as both an international tourism destination and a barometer of Indonesian tourism performance. The number of tourists visiting Bali has also greatly impacted Indonesia's national tourism industry. Bali has emerged as a major entry point for tourists worldwide seeking to visit and enter Indonesia. During the COVID-19 pandemic, tourist entrance ports in Bali continued to receive visitors and international planes, but under very rigorous health supervision and standards. According to the research findings, both domestic and foreign tourists have a high level of satisfaction and performance appraisal of Bali's quality as a tourism destination (Liestiandre, 2021; Suasapha, 2023; Suasapha et al., 2021). The findings of this study can be utilized to analyze and evaluate the quality of destinations or tourist attractions established by each region in Bali, as well as factors that encourage tourists to return and travel to Bali.

The number of tourists visiting Bali, the primary tourist destination in Indonesia, has progressively increased despite the island nation's extremely challenging circumstances brought on by the pandemic. International tourists started to travel after borders were opened, and Bali started to welcome them. The growth in tourist arrivals entering Indonesia through Bali has created opportunities for multiple international airlines to reopen flight routes from various tourist-producing countries to Bali, Indonesia's main tourism destination. The newly opened flight schedules and routes are expected to have an impact on changes in the main market and trends in Indonesian tourism visiting a tourism destination such as Bali, as well as on the type of travel and character of tourists who have visited or will visit Indonesia. This research analyzes trends in international tourist visits to Bali based on the tourists' country of origin and area of

origin to comprehend various patterns in international tourist visits to Bali. Travelers would typically seek locations with greater outdoor and natural tourism attractions (Aldao et al., 2022; Li et al., 2020; Wachyuni & Kusumaningrum, 2020). According to Tenaya and Salma (2023), marketing actions must be implemented through rebranding and the adoption of new values.

Tourists' intents, determination, and motivation have also shifted substantially, affecting the tourist market (Li et al., 2020; Pan et al., 2021; Pappas, 2021; Shin et al., 2022). Destination managers must grasp these changes in order to properly manage their tourism markets (Miao et al., 2022). This also happens in popular tourist destinations (Yuni, 2020). According to empirical research, more detailed details are required to comprehend the various sorts, approaches, and behaviors of tourists (Li et al., 2020). However, study into changing visitor travel habits like this is still uncommon. There must be studies to determine the conditions under which these changes can occur, particularly large-scale alterations like the COVID-19 epidemic.

METHODOLOGY

There are studies on tourism after COVID-19 pandemic that were based on secondary data analysis, such as those reported by Purba et al., (2021; Yoo & Choi; 2022; Zielinski & Botero, 2020; Susilawati et al., 2020). Using secondary data, this study takes a quantitative approach, generating results through quantitative data analysis (Veal, 2018). The quantitative secondary data under analysis is the data that was sourced from the <https://bali.bps.go.id> website of the Bali Central Statistics Agency. The information is presented as data on visits to Bali by foreign visitors between 2019 and 2022. Data analysis are conducted in many locations of the country based on geographical characteristics and the primary Balinese tourism market groups that visit Bali. The data gathered were compared to the number of tourists in 2019 as well as data on tourists visiting Bali prior to the COVID-19 pandemic, as well as data on the number of tourists until 2022, since international flights resumed during the COVID-19 pandemic and were declared safer by the government. The research took 3 months of collecting and analyzing the data.

In order to obtain an understanding of the evolving pattern in tourist visits prior to and during the COVID-19 pandemic, data analysis was performed by processing the data in Microsoft Excel software, following Leiva-Brondo

et al., (2022; Šaparnienė et al., 2022; Frauman & Banks, 2011). This was accomplished by computing the difference in the number of tourist visits for each country. The computed difference divides the number of visitors in 2019 and 2022. The results of the difference computations are then calculated as percentages, which are shown using Microsoft Excel's fast analysis command. The fast analysis results are given in the Results and Discussion section as a diagram. Each graphic is then carefully reviewed to understand the variations in tourist visits to Bali before and after the COVID-19 outbreak.

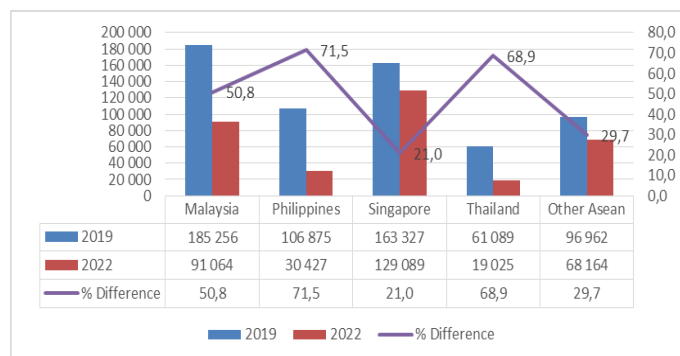
FINDINGS AND DISCUSSION

Findings

ASEAN Markets

Geographically, all Southeast Asian (ASEAN) countries are the closest and most strategically positioned in relation to other Asian countries. Malaysia, Singapore, Thailand, and the Philippines are the ASEAN countries with the most Bali tourists. These are tourist-producing countries that are consistently among Bali's top ten markets. Meanwhile, other ASEAN countries are not particularly significant.

Fig. 1 depicts the changes in the number of tourists visiting Bali before and after the COVID-19 outbreak. Demonstrated among the ASEAN countries, Malaysia is Bali's largest market. Malaysian visitors to Bali outnumbered those from other ASEAN nations such as Singapore, the Philippines, Thailand, and others in 2019. Following the COVID-19 outbreak, the majority of ASEAN visitors visiting Bali were from Singapore. Malaysia, which had previously topped the number of visits compared to other ASEAN countries prior to the COVID-19 outbreak, has now fallen to second place, ahead of other ASEAN countries and the Philippines.



Source: BPS (2023) modified

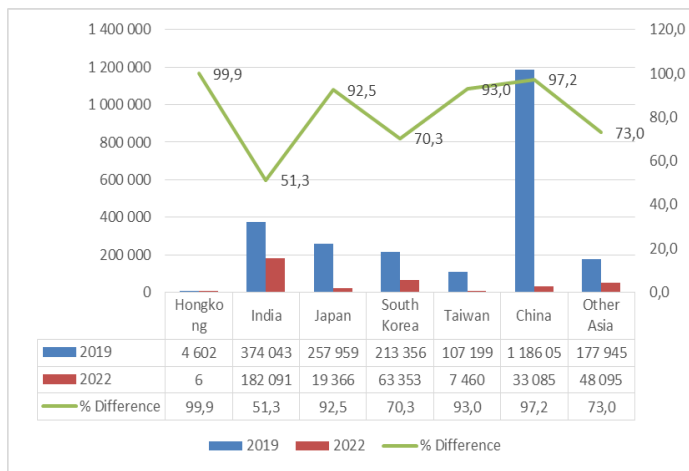
Figure 1. Trends in ASEAN Tourist Visits to Bali before and after the COVID-19 Pandemic (2019 and 2022)

Following the COVID-19 outbreak, visitors from all ASEAN nations have declined. Table 1 demonstrates that the Philippines suffered the greatest shift in the number of visitors when compared to the other ASEAN countries, with a percentage decline of 71.5%. Meanwhile, while it has not recovered completely compared to the number of visits prior to the COVID-19 pandemic, Singapore is the country of origin of tourists with the best recovery compared to other ASEAN countries, with Singaporean tourists visiting Bali down 21% in 2022 compared to before the pandemic.

Asian Markets

China, South Korea, India, Japan, Taiwan, and Hong Kong are the Asian countries with the most visitors to Bali. Several years before the COVID-19 pandemic, China was a tourist-producing country with the highest number of tourists, vying with Bali's five primary markets. This is consistent with the growing number of Chinese visitors traveling to all corners of the world. However, the COVID-19 pandemic has resulted in major changes in this country's market segment.

The following graph depicts a statistical analysis of trends in Asian tourist visits to Bali before and after the COVID-19 pandemic. Fig. 2 demonstrates that, aside from ASEAN, China is the Asian country with the most visitors to Bali in 2019. Meanwhile, following the COVID-19 epidemic (in 2022), India will be Bali's leading source of tourists. This dynamic is the result of China's travel restrictions on its residents, as China is one of the countries still seeing a spike in COVID-19 infection rates at a time when infection instances in other countries have begun to fall.



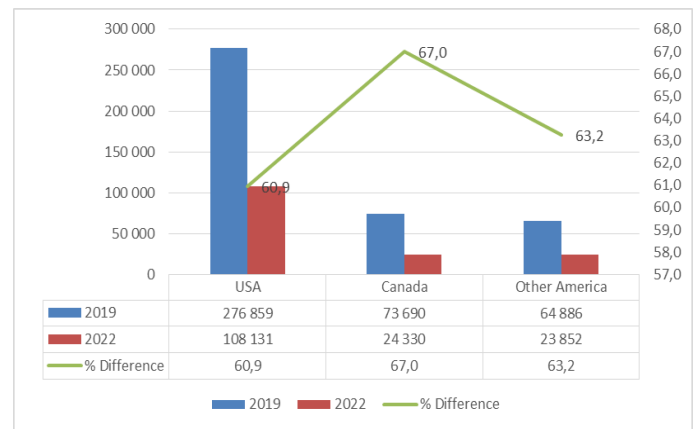
Source: BPS (2023) modified

Figure 2. Trends in ASIAN Tourist Visits to Bali before and after the COVID-19 Pandemic (2019 and 2022)

Looking at the recovery, it is clear that India is the tourist-generating country with the best recovery. Fig. 2 shows that the number of Indian tourists visiting Bali in 2022 would still be 51.3% lower than in 2019. Tourists from China, the greatest source of visitors to Bali before the pandemic, are a tourism market. Except Hong Kong, Bali's recovery is the slowest among ASIAN countries. The percentage decline in the number of visits by Chinese tourists is the second worst after Hong Kong, which decreased by over 100%, with a decrease of 97.2% compared to the number of visits in 2022.

American Markets

Geographically, the countries of the American region are quite remote from Bali as a tourist destination. However, America and Canada are tourism-producing countries for Bali, with generally consistent numbers of visitor visits. Aside from China, America, a major tourist-producing country has recently sent many visitors to Bali. Despite several worldwide challenges, such as the recent global crisis and the COVID-19 outbreak, America continues to provide considerable funding for Bali as a tourist destination.



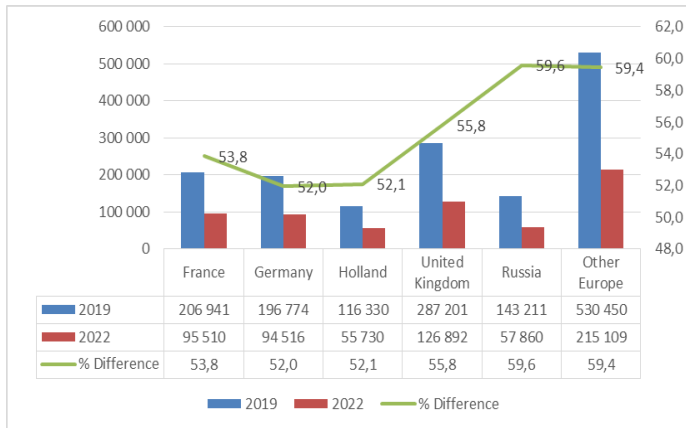
Source: BPS (2023) modified

Figure 3. Trends in American Tourist Visits to Bali before and after the COVID-19 Pandemic (2019 and 2022)

The number of tourist visitors from the United States to Bali before and after the COVID-19 outbreak has altered, as shown in Fig. 3. It is illustrated that the number of tourist visits from the United States recovers the fastest when compared to the number of tourists visits from Canada and other nations on the American continent. Even though it is still declining, the fall in tourist visits from America is the smallest, at about 61%. This is consistent with a study of the number of visits to the United States market before and after the COVID-19 pandemic, which is likewise higher than in other nations in the region. There were no substantial changes in the market sector of countries in the Americas before or after the COVID-19 pandemic; only the number of tourist visits is a concern that needs to be boosted further so that it may return to pre-pandemic levels.

European Markets

European countries such as England, France, Germany, the Netherlands, Russia, and various other European countries such as Italy, Spain, and others have long been popular tourist destinations for Bali. Before the COVID-19 epidemic, European tourists had a considerable impact on the number of tourists visiting Bali, even though these European countries are physically apart from other tourism markets.



Source: BPS (2023) modified

Figure 4. Trends in European Tourist Visits to Bali before and after the COVID-19 Pandemic (2019 and 2022)

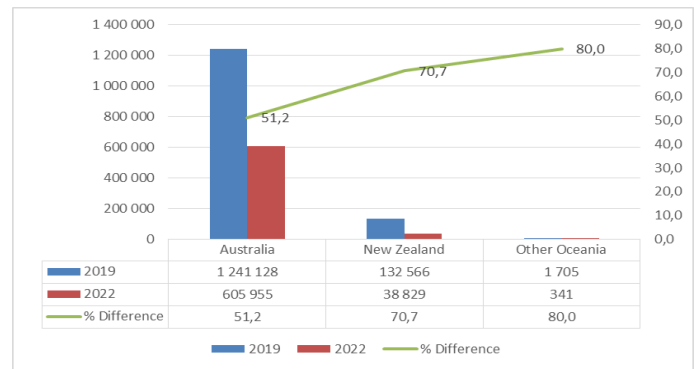
The following are the findings of an examination of data on European tourist visits to Bali, as depicted in Fig.4. The number of tourist visits from Germany showed the highest recovery rate in the European market. Even while the number of visits from all European nations has yet to recover compared to before the COVID-19 pandemic, the level of recovery displayed by tourists from Germany is the best, with the least fall compared to the decline recorded by other European countries. Meanwhile, despite having the highest number of visitor arrivals relative to other European countries following the COVID-19 epidemic, the UK's recovery in the number of tourist visits has been slow. The recovery rate of tourist visits from the UK is rated fourth, with a fall of 55.8% compared to the pre-pandemic era.

Oceania Markets

Geographically, countries in the Oceania area are ideal locations for Bali as a tourist destination. Geographically, countries like Australia and New Zealand must pass through Indonesian territory before departing for other tourism destinations. Thus, Bali is frequently used as a transit tourism destination before or after their main goal. Australia has produced the most tourists and controlled the Bali tourism business for numerous decades. According to the number of flights, both routes and flight schedules to and from Australia are considerably easier to identify and book than flights to and from other countries, even those in Asia or ASEAN itself.

The number of tourists visiting Australia, New Zealand, and other parts of Oceania was stable before and during the COVID-19 epidemic. If, prior to the pandemic, Australia was the leading market country for tourists from

the Oceania region, with New Zealand in second place, the same thing happened after the COVID-19 epidemic. As a result, the recovery in the number of tourist visits from Australia is likewise the best when compared to New Zealand and other Oceania countries, albeit it has not yet regained pre-pandemic visit levels. Bali has emerged as a top tourist destination for Australians.



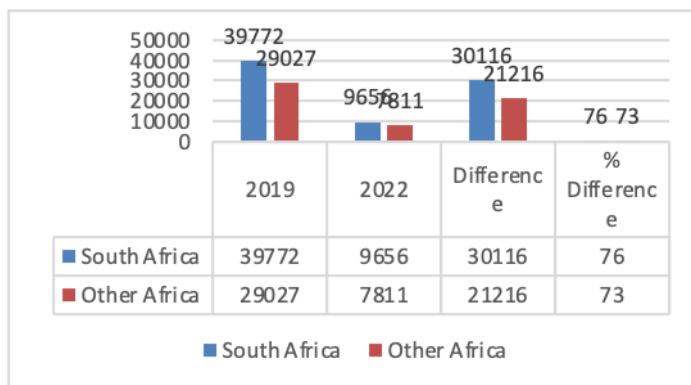
Source: BPS (2023) modified

Figure 5. Trends in Oceania Tourist Visits to Bali before and after the COVID-19 Pandemic (2019 and 2022)

The graph above illustrates that the recovery of the Australian tourist market is the best among Oceania countries for tourist-generating countries, with a percentage decline in the number of tourist visits of 51.2%. This recovery rate is higher than that of New Zealand, which recovered at only 29.3%, and other Oceania countries, which recovered at only 20%. Geographical reasons are considered the most essential factor for countries in Oceania visiting Bali. However, compared to nations that are geographically further away from Bali, such as ASEAN countries, Australian visitors are still taking longer to recover in terms of visitor numbers.

African Markets

Except for South Africa, countries in the African region do not have data significant enough to influence the number of tourists visiting Bali. However, the total number of visitors to Bali from all African countries is far higher. The number of flights and geographical location of African countries remain relatively small and more expensive than other countries to and from the continent. For more details on the number of tourist visits from the African region, see the figure below:



Source: BPS (2023) modified

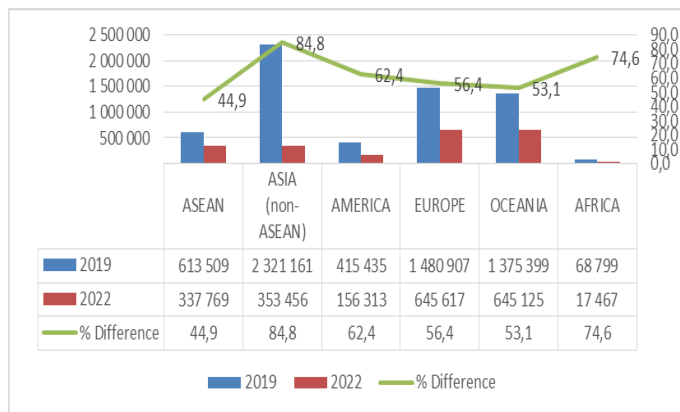
Figure 6. Trends in African Tourist Visits to Bali before and after the COVID-19 Pandemic (2019 and 2022)

The data collected by the Bali Statistics Center only lists two countries of origin for tourists in the African market: South Africa and other African countries. As shown in Fig. 6, the recovery in tourist visits from other African nations is slightly better than the recovery in tourist visits from South Africa, with a percentage drop after the COVID-19 pandemic of 73 and 76%, respectively.

Trends in Tourist Visits to Bali before and after the COVID-19 Pandemic Based on the Continent of Origin

Based on the findings of this data analysis, it is possible to conclude that there have been changes in the level of tourist arrivals from various tourist-producing nations, both towards Bali's key markets and countries that were not previously of concern. Even the countries that used to produce the most tourists are now seeing major declines.

When we look at the data by continent, we see that the ASEAN market recovery rate is the best. According to Figure 7, Oceania is a rapidly rebounding tourism market for Bali, followed by Europe, America, Africa, and Asia (except ASEAN). It has been proposed that the rapid recovery of the ASEAN market is due to changes in visitor preferences following COVID-19, with tourists acting more sustainably by choosing to visit tourism destination countries close to their home countries.



Source: BPS (2023) modified

Figure 7. Trends in Tourist Visits by Continent to Bali Before and After the COVID-19 Pandemic (2019 and 2022)

The most distant recovery was witnessed in Asian countries. This is because countries such as China, South Korea, Japan, and Taiwan, which are the main markets for Bali tourism, have not yet fully recovered; in fact, there is a significant difference between before and after the COVID-19 pandemic, particularly in China, which is thought to be the origin of the COVID-19 pandemic worldwide. However, it is worth noting that India, although geographically farther away than other Asian countries, has already demonstrated a rebound in the number of tourists visiting Bali, surpassing Japan, South Korea, and Taiwan.

The same thing occurs in countries throughout Africa, the Americas, and Europe. The average level of tourist visits is still recovering slowly and will take some time to reach pre-COVID-19 levels. This could be owing to the restricted number of flights to and from Indonesia, particularly Bali, to these destinations. This comprises countries in Oceania. Even if they are physically close to Bali, they have little influence on the recovery of tourist visits from their respective nations to Bali.

However, ASEAN countries have seen a resurgence in the number of tourists visiting Bali, which is still relatively high when compared to other regions. This is due to the closer geographical location and the increased number of routes and flights. As a result, ASEAN visitors' journeys can be considered more effective and efficient. Singapore is the country that has the fastest recovery in visitor levels for Bali, owing to the greater number of flights accessible compared to other countries, especially ASEAN countries.

Discussion

The analysis reveals that ASEAN countries, especially Singapore and Malaysia, are the tourist-generating countries that are the fastest going back to the state before the COVID-19 pandemic. Australia of Oceania is also the fastest to get back to the previous state, followed by Europe, America, Africa, and the Asian markets.

To engage in tourism activity, one needs money. Since tourism is usually not considered the primary need, discretionary income is important in determining engagement in tourism activities. Discretionary income is the income available after taxes, house costs, and other basic needs have been fulfilled that are ready to be spent (Boniface et al., 2005). Discretionary income is strongly linked to people's tendency to travel. The higher a person's discretionary income, the higher the person's propensity to travel (Boniface & Cooper, 2005; Uysal, 1998).

Price is one of the essential components of a tourist destination (UNWTO, 2007). Since tourist is essentially a consumer, they depend on their ability to pay a price to sustain themselves during their trip. Price is closely related to a person's income level. Given that prices reflect other dimensions of purchasing power (Uysal, 1998), increasing income in the tourist-generating countries of Bali will automatically increase the purchasing power of their residents when visiting Bali. Price determines the performance of a tourist destination (Hanafiah & Zulkifly, 2019), therefore price is one of the essential indicators of the competitiveness of a tourism destination. When the price competitiveness index of Indonesia is taken into the equation, Indonesia is still superior compared to other destination countries such as Malaysia and Thailand (Utami et al., 2016). That means that the prices of Indonesian tourist products are lower compared to the prices of tourist products in other countries. Therefore, choosing Bali as a destination is a good decision for most tourists from countries with better economies than Indonesia since they will have a superior purchasing power compared to destinations with higher prices. In this regard, this result supports the study conducted by (A. Liu & Wu, 2019) who stated that domestically, when tourism prices decrease, the demand are higher.

Distance is also an important determinant of destination choice. Distance possesses the ability to decrease or increase the number of tourists visiting a tourist destination. Increased distance will decrease tourist visits (Bao & McKercher, 2008; McKercher, 2008; McKercher et al., 2008). After the COVID-19 pandemic, research confirms that visitors tend to visit tourist destinations that

are nearer due to health and safety issues (Lebrun et al., 2022). As the finding of this analysis shows, it is only logical that the countries of origin whose number of tourists visiting Bali is nearing their previous state before the COVID-19 pandemic are those that lie close to Bali, such as Singapore, Malaysia, and Australia.

Politics seems to play an essential role in determining choices regarding tourism destinations post-COVID-19. During the pandemic, Indonesia and Singapore launch an initiative to open their border for tourism to occur in a carefully selected tourist destination. This initiative is known as the "Travel Corridor Arrangement/TCA" (Kurnianingsih et al., 2022), also widely known as the "travel bubble" (Wu et al., 2022) that is not only implemented by Indonesia and Singapore but also other countries (Wu et al., 2022).

Lastly, it is said that if the currency exchange rate of a tourism destination country is smaller compared to the tourist's home country, then the tourist product's price will be cheaper for the tourist (Uysal, 1998) and some articles has been published related to it. In the United States of America, it was found that the depreciation of The US Dollar to the other currency has resulted in the improvement in the tourism industry of the United States (Dogru et al., 2019). In Vietnam, it is revealed that the currency devaluation has resulted in more tourist arrivals in the country (Tung, 2019). Other article reported that lower exchange rates of destination countries has resulted in a higher tourist flow (Athari et al., 2020). The idea of that article are the same that the lower exchange rate of a tourist destination, the higher the tourist arrival to that area. After the COVID-19 Pandemic, the Rupiah exchange rate is weaker compared to most other countries. Therefore, it will be an advantage for foreign tourists to visit Bali, since they will enjoy a higher spending power. Exchange rate has likely been one of the crucial determinants that encourage ASEAN tourists, along with European, Oceanian, and American to visit Bali. In this regard, this study confirms the research results of Millia et al., (2020) who declared that the depreciation of the Indonesia Rupiah to The US Dollar has resulted in decreasing tourist numbers.

CONCLUSION

This research gives a crucial overview of the development of tourism marketing regulations, particularly in Bali. The research yielded significant results, namely the return of the tourist market to Bali from numerous countries

originating in the geographical regions of ASEAN, Asia, Africa, America, Europe, and Oceania. With the increase in the number of tourists, Bali remains an appealing tourist destination. However, data reveal that not all nations have returned to the number of tourists they had before the epidemic. Market trends in various nations, including ASEAN, Asia, and Europe, have changed in the post-pandemic period. Although this is preliminary research based on secondary data, it is critical to conduct additional research on changes in market trends and studies that focus more on travel patterns and the behavior of visiting visitors.

The government and industry participants must be aware of these developments and be able to adjust rapidly, making practical and strategic efforts to overcome them. Calculating the number of airline seats and additions to flight schedules will impact the rate of tourist recovery in Bali. Opening possible flight routes is also a factor in expanding into new markets from nations that produce high-quality tourists and have strong economic growth, which can influence the targeted tourist categories. Creating a high awareness of Bali's image and the necessity of ecologically friendly and sustainable tourist travel can serve as the foundation for future marketing efforts.

Additional research is required to go deeper into the reasons why tourists visit Bali. Specifically, research might be conducted utilizing tourists as direct respondents to learn about their reasons for visiting Bali after the COVID-19 outbreak. More detailed information on market categories, including not just where tourists come from, but also their gender, age, and even their purpose for going, which was not discussed in this study.

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