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Mapping the Potential of the Domestic Tourist Market in Indonesia

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Abstract

By modifying the quadrant model using secondary data related to the number of domestic tourist trips, GRDP per Capita, Trip Duration, and Average Spending per visit in each province in Indonesia. This research has succeeded in mapping 7 provinces which are categorized as high domestic tourist market categories, including DKI Jakarta, Riau Islands, East Kalimantan, North Kalimantan, Papua, West Papua, and Riau. And, 11 provinces with moderate potential categories, including Central Kalimantan, Gorontalo, Jambi, West Kalimantan, Maluku, North Maluku, East Nusa Tenggara, Central Sulawesi, Southeast Sulawesi, North Sulawesi, and South Sumatra. The Indonesian government needs to optimize these provinces because they are considered capable of providing added economic value to other provinces when traveling.

Keywords: Domestic Travelers, Quadrant Model, Economic Value Added

I. INTRODUCTION

In a health crisis, isolation is the most effective method and has proven successful over time [1]. This is what is happening in the world today when facing the massive spread of Covid-19. The world tourism organization - UWNTO, even in its report states that until the first quarter of 2020 the world has lost more than 67 million foreign tourist trips, whereas of April 20, 2020, it was recorded that all tourist destinations in the world implemented Travel Restrictions [2, p. 8]. The potential losses caused by travel restrictions are very significant for the travel business and tourism industry and have the potential to damage a country's "image", especially tourism [3]. But what is certain is, the restrictions will deter foreign visitors from affected countries [4].

UNWTO stated that according to experts, domestic tourists are the market that will recover first [2, p. 6]. But unfortunately, domestic tourists are still ignored by many developing countries, even though developed countries manage domestic tourism seriously as a way to achieve sustainable tourism development [5]. Likewise with Indonesia, which until now still places the indicator of foreign tourists as an indicator of tourism progress, and this is deemed inappropriate because domestic tourists have a bigger role [6, p. 54]. Domestic tourists play an important role in Indonesia's tourism economy by always being the largest contributor compared to other sources of tourism income (foreign tourists, national tourists, investment, promotion & development) to output, gross value added, labour compensation, and tax on products Neto [6, pp. 56–62].

The advantages of domestic tourists include that this market is not sensitive to crises, be it economic, natural, health or political [7], and does not hesitate to change its travel plans in cases of emergencies such as epidemics or security alerts, and the existence of social commitment as an important function of individuals to visit relatives [8]. This is one of the reasons why domestic tourists can become the basis for the tourism economy in a country [9]. Thus, good management of domestic tourists in Indonesia is expected to help optimize the economic impact of tourism nationally.

The problem faced by Indonesia is, apart from not being managed by the domestic tourist market to provide an optimal tourism impact, there is also no mapped market potential in Indonesia. One of the studies that conducted a mapping of the domestic tourist market was carried out by Anonymous (2019) who modified the Boston Consulting Group matrix, using indicators of travel trends and potential tourism expenditure in Indonesia. In this study, the results showed that the economic conditions described by the indicator of GDP per capita in a province are not always directly proportional to the tendency of the population to travel (Anonymous, 2019). Therefore, further research needs to be carried out, to identify with

certainty the potential of domestic tourist markets in Indonesia, by using the latest data, as well as adding other indicators that can help map potential markets.

The development of Indonesian tourism under the document of the National Long-Term Development Plan is that increasing the added value of tourism will be focused on increasing the length of stay and tourist spending [10, p. 29]. This is done by promoting tourism through various events and easy access to travel within the country, which are expected to increase the choice of domestic tourists for domestic tours, so that service imports can be managed better [10, p. 31]. Where there are 10 priority destinations that will be developed over the next 5 years, including: Lake Toba and its surroundings, Borobudur and its surroundings, Lombok-Mandalika, Labuan Bajo, Manado-Likupang, Wakatobi, Raja Ampat, Bangka Belitung, Bromo-Tengger- Semeru, and Morotai [10, p. 29]. Thus, the research will map the potential of the domestic tourism market in Indonesia, which can be used by the government in formulating Indonesian tourism development policies that, in addition to paying attention to aspects of tourism trends and potential tourism expenditures, also pay attention to aspects of trip duration and expenses per visit when conducting tourism activities. It is important that the economic benefits of tourism can be seen from the indicators of the number of tourists, the length of stay, and the average tourist spending [11].

Tourism demand can be divided into 3 types, namely Inbound, Outbound, as well as domestic market demand [12]. In the tourism sector, the effective measure of demand is the propensity to travel (Travel propensity), which means the percentage of the population that is engaged in tourism [13], [14]. Travel propensity is divided into two, namely: Net Travel Propensity which refers to the percentage of the population that takes at least one tour in a certain period, and Gross Travel Propensity gives the total number of travel trips taken as a percentage of the population [13, p. 23]. Referring to two measures (Nett and Gross), the concept of Gross Travel Propensity (GTP) or the portion of the tourist trips of foreign residents becomes more relevant because it includes multiple visits [13, p. 23]. In previous research, Anonymous (2019) successfully identified Indonesia's GTP in terms of domestic tourist travel. Provinces with the highest GTP in Indonesia include Bangka Belitung Islands (3.63), DKI Jakarta (2.41), Riau Islands (2.21), DI Yogyakarta (2.09), and North Sulawesi (1.75) (Anonymous, 2019).

Tourism demand is influenced by many factors such as the desire of tourists to get away from their worldly life, the need to escape [23] [31], the urge to look for something new or the desire for a certain experience, culture, the number of hotel rooms, transportation, tourism infrastructure such as direct flights, sanitation facilities, safety, security, and information dissemination systems [17]–[19], distance [17], [20], [21], Population trends [22],

the price [15], [23], [24], economy [25]–[27], the image of the destination [28], [29], infrastructure, diversity of attractions and seasons/climate [30], [31]. In addition to factors originating from within tourists, the motivation for tourist visits is also influenced by factors that come outside of their control. These factors include marketing programs [32], [33], as well as government policies related to travel [4], [20], [34].

There are several indicators that are generally used as a measure of prosperity or welfare, one of which is GDP per capita. In macroeconomic measures, the level of welfare of a country's population is generally measured using GDP per capita [35] [36]. Despite its distribution and equity limitations, GDP per capita is a reasonable, rough, and ready-to-use standard of living [37]. GDP and GDP per capita have a relationship with a person's tendency to travel, as well as tourist spending [38] [39]. Gross Regional Domestic Product (GRDP) at constant prices shows the added value of these goods and services which is calculated using the prevailing price in a certain year as the base year, which can be used to determine the distribution and economic structure of an area [40]. The greater the per capita GRDP, the more prosperous the population of an area [41] [42]. Economic growth is also an important factor as an illustration of people's income as seen through the per capita GRDP indicator [43].

Tourist expenditure is an indicator that affects the value of income obtained from the tourism sector [44], so the most important government policy goal is to increase spending by tourists [45]. The increase in tourist consumption will increase the growth of economic output, with various efforts, among others: promotion by targeting potential markets based on market segmentation, especially quality tourists; and increase the length of stay and return visits [46]. Apart from income [47] or who have more potential in terms of expenditure (Gilmore, 2017 & Anonymous, 2018), length of stay and disperse [50] are the indicators commonly used in defining quality tourism.

From a tourist perspective, the length of stay is one of the most important variables in the tourist decision-making process (Salmasi et al. In Alén, Nicolau, Losada, & Dominguez, 2014). In the statistics of domestic tourists in Indonesia, the indicator of the length of stay is shown by the indicator of trip duration. Trip duration is the number of days spent traveling, counted from the time the respondent leaves his house until he returns home [52, p. 26]. From a destination perspective, the factor of the length of stay for tourists is one of the factors that determine the size of foreign exchange received [53]. Travelers with longer stays open the possibility to generate more economic impacts [54]. The amount of money spent by tourists in carrying out tourism activities, include: recreation costs, lodging, and the use of other entertainment services facilities can produce results in the trade sector, hotels, and

restaurants [44]. The amount of tourist expenditure depends on how much time they spend on the trip [55].

II. METHODS

This is a descriptive statistical study using the quadrant model modification approach. The quadrant model is an integrative operating system for complex knowledge and practical development in various areas of life, that defines four basic perspectives that can help expand our understanding of a given phenomenon by combining precision and focus with a broad scope and a clear overview [56]. Quadrant model is a planar (container) divided by grid-2 and formed cells of the same size which is called a quadrant and the number of points in each cell is random, rectangular, (Figure 1) and the hypothesis developed is more about whether the points are regularly distributed or clustered or random or not random [57]. So it can be concluded that the quadrant model can help us understand the phenomenon of the 2 types of variables observed through the four perspectives depicted.

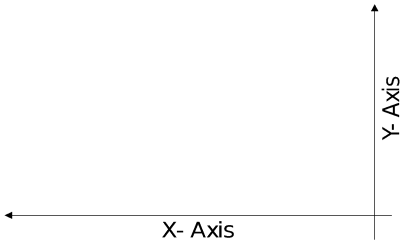


Figure 1. Quadrant Model Illustration

The indicators that will be used as benchmarks in this study include Gross travel propensity according to the province of origin, GRDP per capita Province based on current prices for each province, duration of travel by the province of origin, and average expenditure per visit according to the province of origin. Gross travel propensity in the province of origin refers to the definition presented by Boniface & Cooper (2009) and Rögnvaldsdóttir (2015). Provincial GRDP per capita the current price basis describes the added value of goods and services calculated using the prices in the current period [40], which is divided by the number of inhabitants. In this research, a quadrant model exercise of the four observation indicators will be carried out as shown in Appendix 1.

The steps taken to map the potential domestic tourist movement are as follows. First, for the GRDP per capita indicator based on the prevailing prices for each province, length of stay by the province of origin, and average expenditure per visit by the province of origin, the data

is already available on the official website of the Central Statistics Agency in the 2019 Indonesian Statistics book and Indonesian Tourist Statistics. 2019. Meanwhile, the calculation of GTP is by dividing the total trips produced in a country, by the total population of that country in the same period, then multiplying by 100 [13], [58]. In this study, provincial GTP is obtained from the number of domestic tourist trips produced by a province, divided by its total population and multiplied by 100.

$$GTP_{Province} = \frac{Number\ of\ total\ trips\ generated}{Total\ Population} \text{ x } 100 \quad (1)$$

Second, the midpoint or the intersection of the X and Y axes is the national average, so that the quadrant model will later show which indicators are above or below the national average. Third, pairing the four observed variables with each other to produce six simulation results of comparing the data as shown in Figure 2. The national average data on the X and Y axes will be used as the meeting point. So that the quadrant will show the position of the Province when compared to the national average.

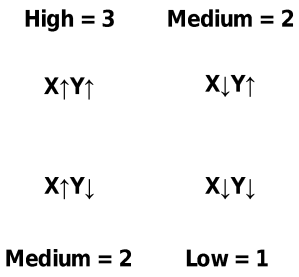


Figure 2. Quadrant Model Modification and Scale Division

Fourth, dividing the simulation results class for each province into a scale of 1 for low, 2 for medium, and 3 for high as in Figure 2. If quadrants IV and II show that one of the indicators is below the national average, then the value in The quadrant is 2. Whereas in quadrant III, where the two indicators are below the national average will be given a value of 1. Quadrant I, which shows both indicators are above the national average, will be given a score of 3. Referring to the picture above, the formula to get the total simulation value is as follows. The total minimum value (V_{Min}) is obtained by the formula:

$$V_{Min} = S_{Min} \times E_n \quad (2)$$

Where is the minimum score, namely 1, and is the number of simulations carried out, namely 6 exercises. So that is 6. The total maximum value (V_{Max}) is obtained by the formula:

$$V_{Max} = S_{Max} \times E_n \quad (3)$$

Where is the maximum score, namely 3, and is the number of simulations carried out, namely 6 simulations. So that is 18. To determine the range between classes (r), the following calculations are performed:

$$r = \frac{V_{Max} - V_{Min}}{N_c} \quad (4)$$

Where is the number of classes, namely 3. Thus, the quadrant with a low total value will be in the range of 6 to 10. A quadrant with moderate values will be in the range 10 to 14. While the quadrant with a high value will be in the range of 14 to 10. 18.

III. RESULTS AND FINDINGS

3.1 Population, GRDP Per Capita, Domestic Tourist Trip, Length of Travel, Expenditure, and Gross Travel Propensity

The data used as an indicator is official data from the Indonesian Central Bureau of Statistics, can be found in Appendix 2. In 2018, Indonesia's population was recorded at 265 million with a growth rate of 1.19% compared to the previous year [59, p. 2]. Provinces with the highest population, among others: West Java (48.7 million), East Java (39.5 million), Central Java (34.9 million), North Sumatra (14.4 million), and Banten (12, 7 million). Indonesia's national average GRDP Per Capita is Rp. 56,548 thousand[59, p. 655]. Provinces with the highest per capita GRDP, among others: DKI Jakarta (Rp. 248,306 thousand), East Kalimantan (Rp. 174,882 thousand), North Kalimantan (Rp. 120,126 thousand), Riau Islands (116,581 thousand), and Riau (110,827 thousand).

When viewed from the number of trips produced by domestic tourists, there are 5 provinces that have the largest number of domestic tourist visits, including East Java (52 million), West Java (49.2 million), Central Java (39.2 million), DKI Jakarta (21.7 million), and Banten (11.4 million). The total of all domestic tourist trips that occurred in 2019 was 282.93 million trips [52, p. 38]. If seen, then 3 of them are provinces with the largest population in Indonesia. This is in accordance with the statement Tribe (2004) which states that the population is an important factor in the aspect of tourism demand.

The national average length of travel taken is 3.13 days [52, p. 47]. Based on the length of trip duration taken, the province of origin of domestic tourists, the longest is West Papua (9.32 days), Maluku (8.34 days), North Maluku (7.41 days), Papua (6.8 days), and North Kalimantan (6.32 days). Meanwhile, the average national expenditure of domestic tourists is Rp. 1,086.2 thousand[52, p. 49]. Provinces with the highest average expenditure per visit were Papua (Rp. 3,846.41 thousand), West Papua (Rp. 3,918.99 thousand), North Kalimantan (Rp. 2,983.8 thousand), North Maluku (Rp. 2,685.15 thousand), and Maluku (Rp. 2,452.02 thousand). There is a positive relationship between the length of the tour and the expenses incurred by domestic tourists. This is in accordance with what was stated by Suastika & Yasa (2015), Wang, Ka, Fong, Law, & Fang (2017), and Brida & Scuderi (2013). The GTP calculation for each province can be found in Appendix 3.

Nationally, Indonesia's GTP is 1.07, which means that every Indonesian resident takes domestic tourist trips on average 1.07 times per year. Provinces with the highest GTP include Bangka Belitung Islands (6.05), Riau Islands (3.70), DKI Jakarta (2.07), DI Yogyakarta (2.03), and Bali (1.48). There has been a shift in the travel pattern of domestic tourists compared to the previous year, as has been done by Anonymous (2019). The Bangka Belitung Islands are still the province with the highest GTP, however, the frequency of trips has almost doubled, while the Riau islands, which were previously in the second position, were displaced by DKI Jakarta, which increased from before. The Riau Islands have experienced a decline in the tendency to travel domestically and occupy third place nationally. Meanwhile, DI Yogyakarta is still in the fourth position with an increase in GTP. However, the fifth rank, previously North Sulawesi Province, was shifted by Bali. The national average used as the intersection point between the X and Y axes are 1.07 for GTP, Rp. 56,548 thousand for GRDP per capita, 3.313 days for trip duration, and Rp. 1,086.2 thousand for average spending per trip.

3.2 Quadrant Model Exercises

The simulation on each combination of the 2 indicators that can be found in Appendix 4. The result is there are Provinces identified that can be used as potential markets for domestic tourists in Indonesia when viewed from each of the 2 forming indicators. The markets with the highest potential are those in quadrant I, where each indicator he observes is above the national average. In exercise 1, which identifies the indicators of GTP and GRDP Per Capita, it can be seen that 2 provinces are in quadrant I, namely DKI Jakarta and Riau Islands. Likewise with Exercise 2, which combines the GTP and Trip Duration indicators, and Exercise 3 which combines the GTP and Average Spend Per Trip indicators which show the same results.

In exercise 4 which combines the indicators of GRDP Per Capita and Trip Duration, and exercise 5 with indicators of GRDP per Capita and Average Spending per Trip, it can be seen that each of the 7 provinces are the same in quadrant I, including DKI Jakarta, Riau Islands, East Kalimantan, North Kalimantan, Papua, West Papua, and Riau. While in exercise 6 with indicators of Trip Duration and Average Spending per trip, 17 provinces are in quadrant I, namely DKI Jakarta, Riau Islands, East Kalimantan, North Kalimantan, Papua, West Papua, Riau, Central Kalimantan, Gorontalo, West Kalimantan, Maluku, North Maluku, East Nusa Tenggara, Central Sulawesi, Southeast Sulawesi, and South Sumatra. Based on the exercise results graphs, it can be seen that the observed variables are random with an indication that there is no pattern formed between the two variables.

From these results, it is found that in the case of domestic tourists in Indonesia, the welfare of an area does not have the potential to generate the tendency of its citizens to travel. This is shown by the quadrant model in exercise 1, where only 2 provinces are in quadrant I, which contradicts the statement of Morphet & Bottini (2015). The results in the quadrant exercise 5 model show that there are only 7 provinces that have a welfare level above the national average with an average spend per trip above the national average. This shows that the findings of WTTC & Oxford Economics (2016) in their research which state that richer regions will spend more per capita spending on tourist trips, do not apply to the domestic tourist market in Indonesia.

Likewise with the findings of Brida & Scuderi (2013), Barros & Machado (2010), Suastika & Yasa (2015), which in their research stated that the amount of tourist expenditure depends on how long they spend while traveling. This looks not much different from what happens in the domestic tourist market in Indonesia, where the quadrant model in exercise 6 shows that there are 17 provinces out of 34 provinces that have the trip duration and average spend per trip above the national average. These findings certainly reaffirm the statement of the Federation of Indian Chambers of Commerce and Industry (2007) where visiting relatives and friends is the main and most frequent destination of domestic tourists. This, of course, will affect spending patterns and length of stay in the area visited. Because this type of visit also generally indicates that tourists are likely to have a stay at a relative/friend's house compared to using the means of commercial accommodation.

3.3 Quadrant Model Combined-Exercises

If the entire quadrant model is combined to be able to identify the potential market for domestic tourists in Indonesia, it can be found in Appendix 5. From Appendix 5, the results show that there are 7 provinces in Indonesia that are in the high potential category to serve as a domestic tourist market, namely DKI Jakarta, Riau Islands, East Kalimantan, North Kalimantan, Papua, West Papua, and Riau. These provinces have the potential for travel, potential expenditure, and a high potential for the length of stay, so efforts can be made to provide added value to the economy of the destinations they visit. Meanwhile, there are 11 provinces that fall into the medium potential category, including Central Kalimantan, Gorontalo, Jambi, West Kalimantan, Maluku, North Maluku, East Nusa Tenggara, Central Sulawesi, Southeast Sulawesi, North Sulawesi, and South Sumatra.

In Appendix 6, can be seen the results of the potential market mapping when combined with the distribution of 10 priority destinations. First, there are priority destinations that are located in provinces with low market potential, but are geographically located close to

each other, either on one island, adjacent to or opposite other provinces with moderate to high market potential. These destinations include Lake Toba and its surroundings, Bangka Belitung, Borobudur and its surroundings, Bromo-Tengger-Semeru, and Lombok-Mandalika. Second, some destinations are located in provinces with medium to high market potential and are geographically located close to each other, either on one island, adjacent to or opposite other provinces with moderate to high market potential. These destinations include Manado-Likupang, Morotai, and Raja Ampat. Third, some destinations are located in provinces with medium to high market potential, but are not geographically close to each other, are in one island, adjacent to, or opposite other provinces with moderate to high market potential. The destination is Labuan Bajo.

IV. CONCLUSIONS, IMPLICATIONS, AND SIGNIFICANCE

This study mapped 7 provinces with high potential for domestic tourists and 11 provinces with medium-level potential for domestic tourists. Under normal conditions, the government needs to develop the seven provinces that have high potential to be able to have an impact on added economic value to other provinces through their tour trips. Meanwhile, in 11 provinces with medium level potential, the government needs to look back at each indicator to be able to find which indicator is below the national average. This can be done to determine the right stimulus for the province in order to increase the number of trips it produces, the average expenditure, and the length of stay on domestic tourism trips.

The implication of this research is that it is time for Indonesia to also pay attention to domestic tourists with great economic potential that can be generated by each trip. Especially at this time where the whole world is being hit by the Covid-19 pandemic, and UNWTO predicts that the domestic market is the first market to recover compared to the international market, where until now Travel restriction is still set by almost all countries in the world. So Indonesia must be able to optimize the potential of domestic tourists. It has to be able to recover the economy from the crisis caused by this pandemic. However, of course, Indonesia must also juxtapose Health indicators in its implementation.

Development of priority destinations that are in provinces with low market potential, but geographically located close to each other, either on one island, adjacent to, or opposite other provinces with moderate to high market potential, it is necessary to create a stimulus so that they visit priority destinations. The geographical location between destinations and markets with medium to high potential levels is an advantage, so it is necessary to optimize promotional activities to generate awareness, interest, and the decision to visit these priority

destinations. For destinations that are in provinces with moderate to high market potential levels, and have a geographic location that is close to each other, either within one island, adjacent to, or opposite other provinces with moderate to high market potential, with the advantage of the geographical location with potential markets, of course In addition to optimizing promotional activities to generate interest, as well as decisions to visit other provinces, it is also important to do the same for market demands that are local in nature or within one province. Meanwhile, for destinations that are in a province with a moderate to high market potential level, but geographically not close together, on one island, adjacent to, or opposite to another province with moderate to high market potential, more effort is needed to bridge the distance between destinations and potential markets, both in terms of promotion and ease of accessibility.

This research has significance in the conditions currently facing Indonesia, where travel abroad is not possible and it is time for domestic tourists to play a bigger role in the tourism economy. Domestic tourist trips must also pay attention to health protocols and the risk of spreading a pandemic. The economic recovery policy through gradual domestic tourism trips can be started with trips within the city, across cities - within provinces, across cities - across provinces, which still pay attention to health indicators.

It is felt that the research still needs further development by identifying and mapping destination provinces which are tourist destinations. Further research using primary data sources is also felt necessary, in order to strengthen the findings in this study.

Appendix 1. List of Exercises for Mapping the Potential of the Indonesian Domestic Tourist Market

	INDICATORS	X-Axis			
		Gross Travel Propensity	**GRDP Per Capita**	**Trip Duration**	**Average Spending Per Trip**
Y-Axis	**Gross Travel Propensity**	-	-	-	-
	PDRB Per Capita	Exercise 1	-	-	-
	Trip Duration	Exercise 2	Exercise 4	-	-

	Average Spending Per Trip	Exercise 3	Exercise 5	Exercise 6	-

Source: Author's Process, 2020

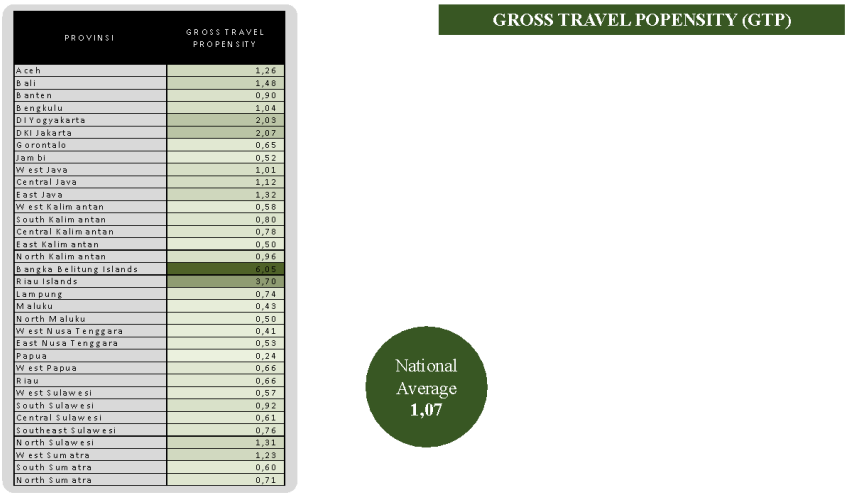
Appendix 2. Population, GRDP per Capita, Number of Domestic Tourist Trips, Average Domestic Tourist Trips, and Average Domestic Tourist Expenditure per Province in Indonesia.

Province	**Population** [1)]	**GRDP Per Capita (In Rp. '000)** [1)]	**Total Trip According To Origin** [2)]	**Trip Duration (Day)** [2)]	**Average Spending Per Visit (In Rp. '000)** [2)]
Aceh	5,281,300	29,522	6,677,350	2.55	887.05
Bali	4,292,200	54,618	6,336,447	2.57	585.9
Banten	12,689,700	48,457	11,390,512	2.31	909.96
Bengkulu	1,963,300	33,827	2,049,220	2.99	832.9
In Yogyakarta	3,802,900	34,152	7,718,353	2.22	630.06
DKI Jakarta	10,467,600	248,306	21,683,578	3.89	1579.37
Gorontalo	1,185,500	31,832	764,717	3.16	1124.45
Jambi	3,570,300	58,365	1,862,760	3.26	1068.38
West Java	48,683,700	40,306	49,247,753	2.18	806.33
Central Java	34,908,000	36,784	39,211,023	1.82	525.15
East Java	39,500,900	55,436	52,081,723	1.86	565.7
West Kalimantan	5,001,700	38,794	2,924,941	3.28	1406.96
South Borneo	4,182,700	41,106	3,344,620	2.84	1043.56
Central Kalimantan	2,660,200	52,154	2,082,520	4.21	1566.05
East Kalimantan	3,648,800	174,882	1,823,000	4,9	2075.84
North Kalimantan	716,400	120,126	686,336	6.32	2983.8
Bangka Belitung Islands	1,459,900	50,052	8,835,507	1.88	631.26

Riau Islands	2,136,500	116,581	7,904,297	3.89	1693.89
Lampung	8,370,500	39,864	6,210,447	2.86	878.7
Maluku	1,773,800	24,278	754,528	8.34	2452.02
North Maluku	1,232,600	29,610	622,143	7.41	2685.18
West Nusa Tenggara	5,013,700	24,707	2,065,701	2.59	956.89
East Nusa Tenggara	5,371,500	18,447	2,865,432	4.92	1560.3
Papua	3,322,500	63,404	796,440	6.8	4846.41
West Papua	937,500	84,958	622,840	9.32	3918.99
Riau	6,814,900	110,827	4,524,315	4.31	1285.81
West Sulawesi	1,355,600	32,124	779,228	4.44	987.71
South Sulawesi	8,772,000	52,707	8,045,434	3,4	950.58
Central Sulawesi	3,010,400	50,038	1,850,710	4.88	1588.74
Southeast Sulawesi	2,653,700	44,502	2,028,472	4.36	1110.99
North Sulawesi	2,484,400	48,118	3,250,699	2.86	1116.2
West Sumatra	5,382,100	42,833	6,608,377	2.65	709.96
South Sumatra	8,370,300	50,144	5,005,476	3.32	1240.76
North Sumatra	14,415,400	51,417	10,270,955	2.66	812.1

Source: 1) Statistical Yearbook of Indonesia 2019 [59], 2) Domestic Tourism Statistics 2019 [52]

Appendix 3. Indonesia's Gross Travel Propensity (GTP), 2019



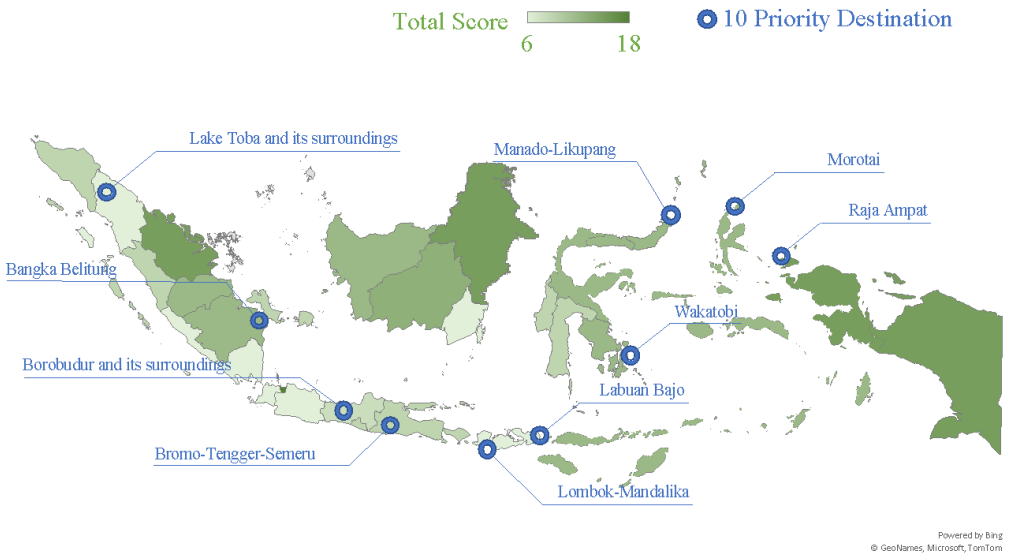
Appendix 4. Potential Market-Forming Indicators Exercis.

Appendix 5. Quadrant Model Scoring Results

Province	Exercise 1	Exercise 2	Exercise 3	Exercise 4	Exercise 5	Exercise 6	Total Score	Remarks
DKI Jakarta	3	3	3	3	3	3	18	HI
Riau Islands	3	3	3	3	3	3	18	HI
East Kalimantan	2	2	2	3	3	3	15	HI
North Kalimantan	2	2	2	3	3	3	15	HI
Papua	2	2	2	3	3	3	15	HI
West Papua	2	2	2	3	3	3	15	HI
Riau	2	2	2	3	3	3	15	HI
Central Kalimantan	2	2	2	2	2	3	13	MED
Gorontalo	1	2	2	2	2	3	12	MED
Jambi	2	2	1	3	2	2	12	MED
West Kalimantan	1	2	2	2	2	3	12	MED

Maluku	1	2	2	2	2	3	12	MED
North Maluku	1	2	2	2	2	3	12	MED
East Nusa Tenggara	1	2	2	2	2	3	12	MED
Central Sulawesi	1	2	2	2	2	3	12	MED
Southeast Sulawesi	1	2	2	2	2	3	12	MED
North Sulawesi	2	2	3	1	2	2	12	MED
South Sumatra	1	2	2	2	2	3	12	MED
Aceh	2	2	2	1	1	1	9	LOW
Bali	2	2	2	1	1	1	9	LOW
In Yogyakarta	2	2	2	1	1	1	9	LOW
East Java	2	2	2	1	1	1	9	LOW
Bangka Belitung Islands	2	2	2	1	1	1	9	LOW
West Sulawesi	1	2	1	2	1	2	9	LOW
South Sulawesi	1	2	1	2	1	2	9	LOW
West Sumatra	2	2	2	1	1	1	9	LOW
Central Java	1	2	2	1	1	1	8	LOW
Banten	1	1	1	1	1	1	6	LOW
Bengkulu	1	1	1	1	1	1	6	LOW
West Java	1	1	1	1	1	1	6	LOW
South Kalimantan	1	1	1	1	1	1	6	LOW
Lampung	1	1	1	1	1	1	6	LOW
West Nusa Tenggara	1	1	1	1	1	1	6	LOW
North Sumatra	1	1	1	1	1	1	6	LOW

Appendix 6. Potential Domestic Market and 10 Priority Destination



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