



THE  NDONESIAN INSTITUTE  
CENTER FOR PUBLIC POLICY RESEARCH

# *Tourism Behaviour Embracing New Normal*



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# TOURISM INDUSTRY

## WHY TOURISM MATTERS



Tourism has the biggest economy impact and Comprised of 185 business activities (SICTA-WTO)



“Tourism as the most efficient and faster contributor towards GDP, Foreign Exchange, and Employment.”  
World Bank

UNWTO STEP Program - Sustainable Tourism for Eliminating Poverty

(2000 – 2010)

**35%**

( WTTTC “Trade and Tourism Linkages” report, 2014)

**CONTRIBUTION of TOURISM towards TRADE (global export)**



(2018)

**US\$ 8,8 Tn**

(10,4% of Global GDP)

**GDP of TOURISM CONTRIBUTION**



(2017)

**319 M**

(10% of Global Employment)

**EMPLOYMENT of TOURISM CONTRIBUTION**

# CAPAIAN DAN PROYEKSI PARIWISATA INTERNASIONAL

## International Tourist Arrivals



### Growth International Tourist Arrivals



## International Tourist Receipts



### Growth International Tourist Receipts



## International Muslim Tourist Arrivals



### Growth International Muslim Tourist Arrivals



## International Muslim Tourist Receipts

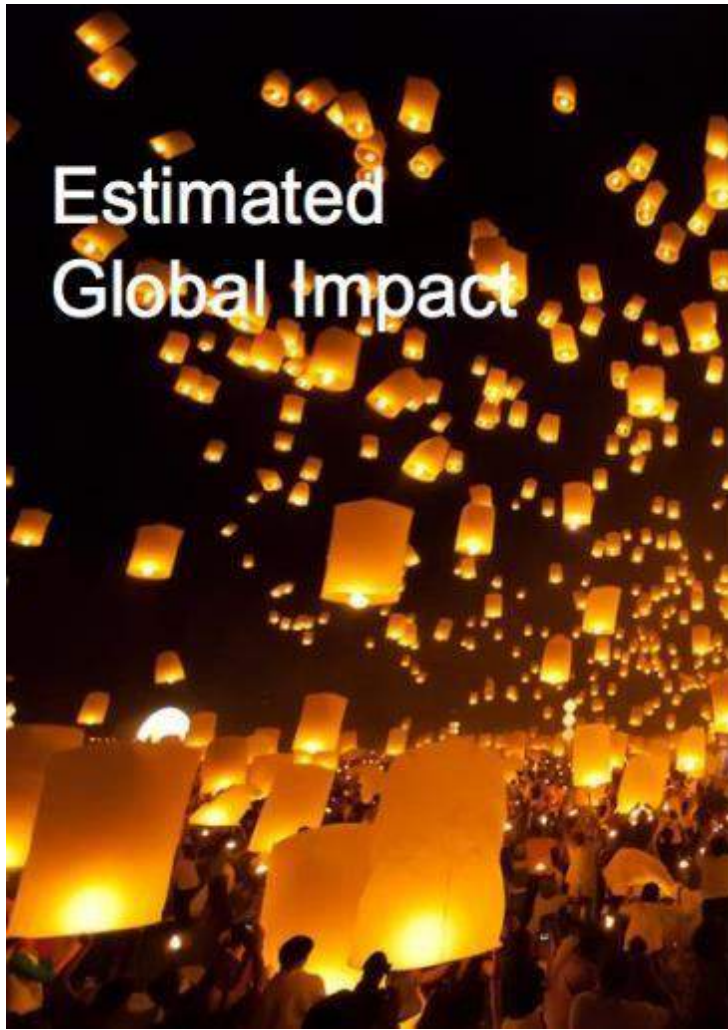


### Growth International Muslim Tourist Receipts



Source : SofyanConsulting Compilation from UNWTO

# ESTIMATED GLOBAL IMPACT ON THE TOURISM SECTOR



Estimated  
Global Impact



↓ **290 M** to **440 M**  
International  
Tourist Arrivals



↓ **300** to **450 US\$ Bn**  
Tourism Exports (receipts)



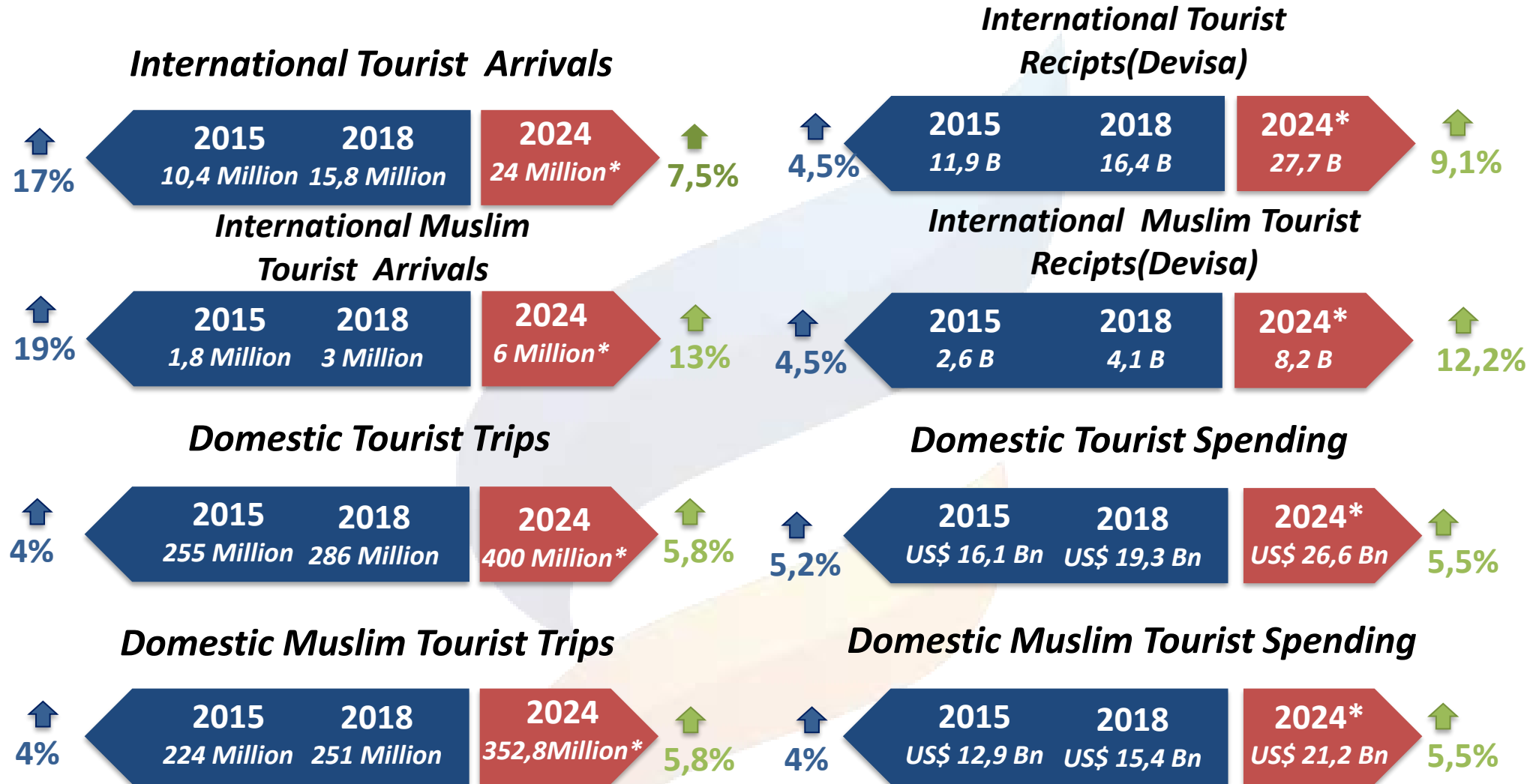
**5** to **7 years**  
Lost in number of  
tourist



↓ **1/3** of **1.5 US\$ Tn**  
Lost in Tourism Exports

Source: UNWTO April 2020

# CAPAIAN DAN TARGET PARIWISATA NASIONAL



\*target

Source : Sofyan Consulting Analysis from Several Sources

# DAMPAK TERHADAP INDUSTRI PARIWISATA DI INDONESIA



Pemerintah menutup **180** destinasi dan **232** desa wisata di Indonesia



Penurunan kunjungan wisman pada Maret 2020 sebesar **-64,11%** dibandingkan Maret 2019



**>2000** hotel dan **>8000** restoran/tempat hiburan berhenti beroperasi dan kehilangan **\$4 Bn**



**90%** (13juta) tenaga kerja Pariwisata terkena PHK/Dirumahkan/Unpaid Leave

Hampir **7000** BPW Anggot ASITA Berhenti beroperasi, Airline kehilangan **\$ 812 M**



Sekitar **37.000** UMKM yang terdampak



Penjualan sektor ritel, khususnya pusat perbelanjaan, turun **95%**



Potensi Penurunan pendapatan sbb.:  
dari WISMAN *devisa* sebesar **\$1Bn** /bulan,  
dari WISNUS *spending* **\$1.6Bn**/bulan



## COVID-19 IMPACT (17 June 2020)

	World	USA	Brazil	Russia	India	Indonesia
<b>Cases</b>	8.282.689	2.208.402	928.834	553.301	355.060	41.431
<b>Deaths</b>	446.519	119.132	45.456	7.478	11.922	2.276
<b>Recovered</b>	4.337.963	903.042	477,364	304.342	187.718	16.243

## Natural Disasters in Indonesia

- **3768** disasters in 2019
- **2240** disasters in 2018
- **2175** disasters in 2017
- **2171** disasters in 2016
- **1681** disasters in 2015

• Between 2000 – 2013, approx. :



**190.000**  
people died



**420.000**  
injured



**10.000**  
missing



**8,2M**  
evacuated

### Facts 2019

- ~ 10 Disasters/day

### Facts 2018

- ~ 5 Disasters/day
- **22 Dec 2018: Tsunami West Java – Eruption of Anak Krakatau (~300 people died).**
- **28 Sept 2018: Earth Quake Palu (Central Sulawesi): > 2000 people died, 1.5 million affected, 68,000 house damaged, thousand still displace.**
- **28 July 2018, Earth Quake in Lombok. 555 people died, 390,529 affected (refugee).**
- **April - May 2019, more 4 times the eruption of Mount Agung, Bali**

# THE 3 MEGASHIFTS of CONSUMER BEHAVIOUR

In Time of Covid-19 Crisis

## MORE ONLINE LIFESTYLE



01

- **Work,**
- **Learn,**
- **Social,**
- **Worship,**
- **Shop,**
- **Etc.**

## PRUDENT, ESSENTIAL, HEALTHY LIFESTYLE



02

- **Prudent Mobility**
- **"Work-Live-Play" Balance: Well- Being Revolution**
- **The Century of Self Distancing – Privacy Society**
- **Healthy and Wellness Lifestyle**

## Empathic Society



03

- **The Rise of Empathy and Solidarity**
- **Stronger Family Bond and Positive Parenting**
- **More Suffering, More Religious**

Source : SofyanConsulting Compilation from  
Consumer Behavior **New Normal** After Covid-19 - The 30 Predictions By Inventure Knowledge

## 1. Family Friendly Tourism Responsible, Inclusive, Halal Life Styles

## 2. Safety and Security of Wellness

1.  
Staycation, Hommy,  
Interactive, Relationship,  
Activites

2.  
Destinasi Jarak  
Pendek/Dekat, Domestic  
Travel

3.  
Safe, Clean, Health &  
Secure Destination

4.  
Health, Hygiene,  
Sanitation Sensitive, New  
Protocol

10.  
Niche Market,  
Voluntourism, Education,  
Phulanthropy, Eco-Nature  
Seekers, Healing,  
Ecotourism

### MEGA TRENDS & HALAL TRAITS NEW NORMAL IN TOURISM

5.  
Sustainable & Responsible  
Tourism

9.  
Non Personal Services  
Deliverables & Distancing

8.  
Digital Ecosystem

7.  
Authentic Value Creation  
Product Development

6.  
Reliance & Local  
Knowledge Experience,  
Local Wisdom, Past  
Literacy

## 3. Knowledge, Mutual Respect and Understanding

Notes:

TOURISM  
MEGA  
TRENDS

HALAL  
TOURISM  
TRAITS

## 5. Welfare and Betterment of Society

## 4. Culture, Heritage, The Virtue of Legacy

### PELUANG

- PDB Indonesia no 16 dunia dan populasi terbesar no 4
- Komitmen Pemerintah mendukung Perkembangan Pariwisata
- Peningkatan Masyarakat Kelas Menengah
- Destinasi Wisata yang beragam budaya dan alam.
- Biaya wisata murah
- Perkembangan Era Digital 4.0
- Destinasi Wisata Halal No.1 ver. GMTI
- Penyelenggaraan International Event
- Gaya Hidup “Halal Thayyiban” sudah menjadi DNA-nya Indonesia -> New Normal



### TANTANGAN

- Keterbatasan fasilitas kesehatan, obat-obatan, dan pencegahan Covid-19
- Berkurangnya daya beli masyarakat
- Minimnya program stimulus ekonomi dari Pemerintah dalam penanganan Covid-19 bagi para pelaku usaha
- Terbatasnya anggaran pemerintah untuk pariwisata
- Periode pandemi/PSBB yang lebih lama
- Trauma/ketakutan pada masyarakat akibat Covid-19
- Naiknya biaya transportasi
- Safety, hygiene, sanitasi

Source : Sofyan Consulting Analysis from Several Sources

# 3 Main Factor



**NEW  
BUSINESS MODEL**



**HEALTH PROTOCOL**



**EXTERNAL RISK**

## LANGKAH STRATEGIS

1. New Business Model (Manage Cash Flow, Cut/Restructure Cost, Request Additional Loan, Restructure Loan, Manage Utilities Cost, Tax etc., Secure Employee/Partnership Scheme, BPJS, Pivoting Scheme for Employee/Associate/Vendor, Product and Services Transformations)
2. Pembuatan *Save Travel Protocol Indonesia* dan *Traumatic Recovery Program*
3. Inovasi dan kreatifitas dalam penciptaan produk atau jasa yang dapat segera dibutuhkan pasar
4. Go Digital (Digitalisasi *Save Travel Protocol*, *Contactless Procedures & Services*, Digital Marketplace, *E-Training* dan *E-Learning*, Digital Marketing Communication and Campaign)
5. Pembuatan Program Mitigasi “ *SIAP SIAGA PARIWISATA* “ → *SECOND WAVE, OTHER CRISES - LIMITED GOVERNMENT SUPPORT*



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# TERIMA KASIH



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General Guidelines



Wear a mask & change it every 4 hours.



Respect a social distance of 1.5 m



Use a single-use tissue to blow your nose and wash your hands after you throw it away.



Don't touch your face



Cough or sneeze into your elbow.



Discard the protective equipment in a trash can identified "COVID"



Avoid direct contact with other people.



Disinfection: no direct spraying on but soak soft disposable cloths or microfibers

Aspek - Aspek yang Terpengaruhi

**1** Mengecek kesehatan dan kebersihan diri sebelum menaiki transportasi publik

**2** Pembatasan tempat duduk pada transportasi publik

**3** Jumlah armada dan penumpang yang dibatasi

**PROTOKOL LUAR RUANG DAN TRANSPORTASI PUBLIK**

**PARIWISATA & PERHOTELAN**

**1** Penerapan sistem self check-in dan self service

**2** Pembatasan jumlah wisatawan / pengunjung

**3** Pengembangan fitur "virtual tour" pada tempat wisata

**1** Meningkatkan standar kebersihan

**2** Utamakan sistem "take away"

**3** Membatasi jumlah pengunjung, dan melakukan modifikasi tempat duduk berjarak

**RESTORAN & CAFE**

**DUNIA KERJA**

**1** Peningkatan standar kebersihan dan kesehatan bagi karyawan

**2** Perjalanan dinas dibatasi

**3** Pembatasan jumlah karyawan yang bekerja dari kantor dan menerapkan sistem work

# Covid-19 Economic Stimulus:

Learning from Other Countries

**Indonesia Rp 695 Tn / US\$ 49 Bn**  
**(4,4% GDP US\$ 1,111 Bn) :**



- Healthcare Spending
- Tax Incentives & Credit
- Social Protection
- Economic Recovery Program



**Germany US\$ 810 Bn (21% GDP US\$ 3,853 Bn):**

- Small companies receive 15.000 Euro for 3 Months
- Big Companies receive 400 Bn Euro



**China US\$ 424 Bn (3% GDP US\$ 14,140 Bn):**

- Companies receive financial support: 3 T Yuan



**New Zealand US\$ 120 Bn (59% GDP US\$ 203 Bn):**

- Cash transfer for workers: US\$ 6 Bn



**Malaysia US\$ 62.9 Bn (18% GDP US\$ 358 Bn):**

- Cash transfer for Companies and Workers



**Singapore US\$ 44.4 Bn (12% GDP US\$ 364 Bn):**

- Cash transfer for Companies and Workers



**Thailand US\$ 43.3 Bn (9% GDP US\$ 505 Bn):**

- Six Months Loan Moratorium
- Cash transfer for Workers

# CAPAIAN DAN TARGET PARIWISATA NASIONAL

## International Tourist Arrivals



## International Tourist Spending/trip



## Devisa Pariwisata



## International Muslim Tourist Arrivals



## International Muslim Tourist Spending/trip



## Domestic Tourist Trips



## Domestic Tourist Spending



## Devisa Pariwisata Halal



## Domestic Muslim Tourist Trips



## Domestic Muslim Tourist Spending



\*target

Source : Sofyan Consulting Analysis from Several Sources

# DAMPAK EKONOMI GLOBAL & INDONESIA

## Perkiraan Pertumbuhan Ekonomi Global

**-3%**

**IMF**

**-1.1%**

**JP Morgan**

**-2.2%**

**EIU**

**-3.9%**

**Fitch**

Dampak Covid-19 dalam sector Ekonomi berpotensi memicu **GLOBAL RECESSION**

## Kondisi Perekonomian Indonesia



Pertumbuhan Ekonomi Indonesia diperkirakan **hanya -0,4% bahkan hingga -3,5% (World Bank)**



Mayoritas sektor produksi mengalami penurunan pendapatan di Q1-2020, terutama di komoditas, perdagangan, dan sektor berbasis transportasi



Ada 3 sektor yang masih berkembang: **Informasi & komunikasi, layanan kesehatan, dan layanan keuangan**

Source : Sofyan Consulting Analysis from Several Sources