

Mapping Study of Bali Tourism Destination Readiness: A New Normal Adaptation of CHSE from Demand and Supply Perspective

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Abstract

The Covid-19 pandemic has the potential to threaten the welfare of the tourism workforce in Bali Province. The implementation of CHSE is still dealing with the unpreparedness of amenities in Bali tourist destinations. The purpose of this study is to identify the readiness of tourism destinations in implementing a new custom order in Bali based on the perceptions of managers and tourists. This research was conducted in 9 districts or cities in the province of Bali with different characteristics, development, and readiness of tourism. The sample of this study came from 214 tourists and 101 managers in Bali tourism destinations. The analysis used is descriptive quantitative analysis, Spatial analysis, and Important Performance Analysis. The results of this study identify that, Bali tourism destinations are in a state of readiness for the implementation of new habit adaptations, where only 3% are in a less prepared condition. The tourist perspective also shows that the comparison between expectations and tourist satisfaction related to the CHSE protocol is only 0.2. There is a staff service variable in educating and encouraging the application of protocols that are in the top priority quadrant which means that the expected value for the attributes in this quadrant is high but the value of tourist satisfaction that can be realized is still low.

Keywords: *tourism destination readiness, new normal, CHSE adaptation, demand and supply, Bali*

Introduction

The Coronavirus and Disease (Covid-19) pandemic has had a fatal impact on the global tourism industry, as of April 2020, as many as 83% of the world's destinations have imposed travel restrictions. As many as 49% of destinations closed their borders to tourists and halted flights partially or simultaneously. Large-scale travel restrictions make the world of tourism must anticipate losses that reach more than US \$ 2.1 trillion and more than 75 million people lose their jobs in 2020 (WTTC, 2020).

In Indonesia, the tourism sector has become sluggish since large-scale tourism restrictions are unavoidable. This condition has had a crucial impact on the Indonesian economy including: (1) workers who were laid off and laid off, more than 1.5 million; (2) 12,703 flights at 15 airports were canceled during January-March 2020; (3) tourist arrivals fell to 6,800 per day, especially tourists from China; (4) the loss of revenue in the air service

sector reached Rp 207 billion; (5) The decline in occupancy/placement at six thousand hotels decreased by five percent (Hanoatubun, 2020).

In line with these data, in 2020 the number of tourist visits to Indonesia decreased by -95% overall. As the main entry point for foreign tourists to Indonesia, Bali Province experienced a decline in tourist arrivals for the first time in the last five years. As an illustration, in May 2020 compared to May 2019 the decline reached -99.99%. With a decrease of 486,602 visits. When compared to the previous month, decreased - 88.99% from 327 visits. The total number of foreign tourists to Bali throughout 2020 was 1,050,060 visits, down -54.47% from the same period in the previous year. The inclination of the decline in tourist visits has an impact on other components of tourism destinations. The hospitality industry is one of the most affected components of the destination.

The occupancy rate of 5-star hotels as seen from the room occupancy rate (TPK) has significantly decreased from 63.58% in December 2019 to 5.08% in September 2020. The lowest rate of 5-star hotel room occupancy in Bali was in May 2020 which is only 1.25%, in contrast to May 2019 which was 51.56%. In fact, the decline began to be seen from February to May 2020 and this month was the lowest point of 1.25%. However, from June to September 2020 it began to increase, although it was not significant because it was only in the range of 0.50% to 2%.

The decline in the tourism industry ultimately threatens the welfare of the workforce in Bali Province. BPS data (2019) shows that as much as 50% of Bali's workforce is absorbed in the tourism service sector. This means that 50% of the workforce has a high potential to experience termination of work contracts due to the company being unable to operate and even going bankrupt due to the COVID-19 pandemic. As an illustration, based on data from regencies and cities throughout Bali, the number of employees or workers affected by termination of employment (PHK) is 1,806 people and 63,029 people are laid off. Most of the employees or workers who are laid off or laid off in the tourism sector are in the field of providing food and beverages such as restaurants or restaurants and others (Merdeka.com, May 2020).

The COVID-19 pandemic which has a negative impact on the Bali economic sector will put the Bali economy in a state of crisis (diskes.baliprov.go.id). Epidemiologists warn that if health protocols are not implemented in Bali as a destination for foreign tourists, this will actually make Bali the location of a new cluster of SARS-CoV-2 virus transmission. Epidemiologist from Airlangga University (Unair), Laura Navila Yamani warned the Bali government to open tourism gradually with the provisions of the SARS CoV-2 Virus protocol. Bali must ensure that tourists who come to Bali are not from the red zone. Then, the number must also be limited, including tourist attractions that are opened. This is done to reduce the number of cases of SARS-CoV-2 transmission and restore Bali tourism gradually (bbc.com, 2020).

In the future, tourists from various countries will feel more anxious when traveling. Therefore, in welcoming the new custom order, it is necessary to pay attention to various important factors and considerations that influence tourist decisions in visiting tourist destinations. The factors in question include; (1) safety, namely the perception and condition of reality; (2) health, namely the obligation to carry out health checks for every tourist; (3)

hygiene (cleanliness) is mandatory that cannot be compromised in building visitor trust; (4) a brand that prioritizes quality; and (5) value, where good value for good money will become the new mantra in every tourist destination (Kohli et al., 2020).

Responding to the enormity of the negative impact of the Covid-19 pandemic, the central and regional governments have tried to implement various priority policies to save the Bali tourism industry, one of which is adapting to the application of strict and disciplined health protocols in a new habit order or known as Cleanlines, Health, Safety and Environment or CHSE. On the other hand, the problem is that there are still many tourist destination locations in Bali that have inadequate amenities.

The Ministry of Tourism and Creative Economy (Kemenparekraf) plans to revitalize Bali tourism destinations with a main focus on improving amenities in a number of tourist attractions in Bali in the form of repairing toilets and adding other facilities to support cleanliness, health, security, and tourist comfort by implementing health protocols (kemenparekraf.go.id, 2020). In addition, there are still visitors and people who are not disciplined in implementing health protocols at destinations which are also a problem (<https://national.kontan.co.id/>, 2020). Therefore, a mapping study of the readiness to adapt to new habits in Bali tourism destinations is seen as very urgent.

Literature Review

Studies on crisis management in tourism destinations in Mexico in handling the AH1N1 influenza virus outbreak show that each destination will be affected in different ways and at different levels, requiring different responses and handling (Speakman & Sharpley, 2012). The Chaos Theory approach is considered suitable for handling crises in tourism destinations because it simply views the phenomenon of the tourism crisis as a complex non-linear system. The key is the ability to recognize the branching stage for what it is and be able to respond to chaos. This theoretical approach emphasizes that the non-linear nature of the crisis requires adaptive ways for the tourism sector to be able to survive and even continue its activities. With this theory, the steps that can be taken by Bali as a tourism destination hit by a crisis to be able to survive are to adapt to very fast changes that cannot return to its original form. Thus, the method of adapting to new habits seems relevant to Bali.

A similar study that is used as a reference in this study which was carried out long before was carried out by Denison (1995) where a model of organizational culture and effectiveness was developed based on four characteristics of organizational culture; engagement, consistency, adaptability, and mission. Adaptation is an emphasis on the organization's ability to adapt to the environment, accept, interpret and translate external disturbances or changes into organizational norms that have an impact on the sustainability and resilience of an organization. Culture can be studied as an integral part of the adaptation process and that certain cultural traits can be useful and effective predictors of performance.

Agustino's research results (2020) related to the Adaptation and New Habits of the Human Resource Department during the Covid-19 Pandemic are used as a reference in this study, especially regarding the adaptation of this new habit carried out in important sectors

or fields, one of which is tourist destinations in which there are tourist attractions, accommodation, accessibility and tourist facilities. As tourism restarts, UNWTO calls on destinations to recognize and meet the needs of travelers with disabilities or special access requirements. UNWTO recommendations cover four different areas, namely (1) Travel planning and protocols; (2) Transportation; (3) Accommodation, bars and restaurants; and (4) tourism activities.

This study also refers to several guidelines for handling Covid-19, including those issued by WTTC (2020) which provide a global protocol reference in the new normal era. The World Travel & Tourism Council (WTTC) in May 2020 has outlined what the New Normal or the new normal in traveling will look like. WTTC has compiled various protocols to support the New Normal in the tourism business sector. Several forms of the New Normal in tourist travel can generally be described as follows: (1) there will be a new check-in protocol involving digital technology; (2) hand sanitizer stations in frequently visited places; (3) contactless payments (cashless payments); and (4) maintain a safe distance of 2 meters from other people (WTTC, 2020).

Another guide that is used as a reference in this study is the guideline that has been officially released by the Ministry of Tourism and Creative Economy (Kemenparekraf) known as the CHSE Implementation Guide. Guidelines for the Implementation of Cleanliness, Health, Safety and Environmental Sustainability (CHSE) or hereinafter referred to as Guidelines for the Implementation of Cleanliness, Health, Safety, and Environmental Sustainability in Tourist Attractions is an operational guideline from the Decree of the Minister of Health Number HK.01.07/Menkes/382/2020 concerning Health Protocol for the Community in Public Places and Facilities in the Context of Prevention and Control of Corona Virus Disease 2019 (Covid-19). A number of variables in this guide are used to assess the readiness to adapt to new habits in the three main components of tourism destinations from the stakeholder side.

In addition, the guide used as a reference in this research is the Guidelines for Verification of Protocols for the New Era of Life Order of the Bali Provincial Tourism Office in 2020 which were issued long before the CHSE guidelines were issued by the Ministry of Tourism and Creative Economy which have been used for certification for tourism businesses in Bali related to the handling of Covid-19. This guideline is used to see the assessment of Bali's readiness from the perspective of tourists.

Method

Broadly speaking, this study was designed with a mix method approach (mixed qualitative and quantitative analysis). The mixed methods research strategy used is a sequential explanatory strategy (Creswell, 2013). Through a demand and supply side approach, this study seeks to provide a more comprehensive picture, so that it is expected to be a reference in deciding more sustainable tourism policies in the era of adaptation to new habits (Saddler, 1997 in Clayton, 2002). The location of the research was carried out in the province of Bali, which administratively went through 9 districts or cities with different characteristics, developments, and tourism readiness. The 9 regencies and cities in

question are Badung, Bangli, Gianyar, Klungkung, Karangasem, Buleleng, Jembrana and Denpasar City.

To analyze the readiness of tourist destinations in implementing the new custom order, two analytical approaches will be used. From the supply approach, the stakeholder perception will be used. The data will be analyzed qualitatively using Quantitative Descriptive (Frequency Distribution of Readiness). From the demand approach, the perception of tourists will be used. The data will be analyzed using quantitative methods, namely IPA (Importance Performance Analysis). Tourist perceptions are obtained through the results of a questionnaire. Respondents were asked to rate the level of importance (expectations) and performance (perceptions) of the dimensions of tourism destinations in Bali.

Tourists who became the sample in this study were 214 people through the Purposive Random Sampling technique. The number of samples as proposed by Cohen (1988) based on the analytical power of a sample of 156 will have an analytical power of 0.80 and 216 samples will have an analytical power of 0.90. As for the sample of managers in the Bali province destination, 101 managers were obtained through the Quota Sampling technique with details, 50 DTW, 25 hotels, and 26 restaurants. This sample reference is in accordance with the requirements of Fraenkel et al., (2012) a sample size of 100 is considered appropriate and even meets the requirements for descriptive data analysis.

In addition, spatial analysis through the application of ArcGIS 10.8 using spatial analyst tools is also applied in this study. The spatial analysis method used is interpolation with the IDW technique. By using the data from the questionnaire assessment, this score was converted to be able to see the distribution pattern of readiness for adaptation to new habits in 9 districts or cities in Bali. The Inverse Distance Weighted (IDW) method is a simple deterministic method by considering the surrounding points (NCGIA, 2007).

A number of data collection techniques will be carried out including: Focus Group Discussion (FGD) , in-depth interviews, surveys, observations, and literature studies in order to obtain a fairly strong triangulation of data in addition to validity and reliability tests. The results of this study are expected to provide a more comprehensive picture through a demand and supply approach that involves stakeholders in the main components of tourism destinations in Bali Province.

Result

Readiness of Tourism Destinations in Implementing New Customary Orders in Bali based on stakeholder perspective

The readiness of Bali tourism destinations in this study was measured through an assessment of the application of the CHSE protocol in Bali Tourism Destinations not only limited to tourists who visit, but also those who act as managers in tourism destinations. This includes all elements of society who play a role and are involved in ensuring that health protocols are carried out according to procedures both in tourist attractions, as well as accommodation businesses and the provision of food and beverages. The following is an explanation of the readiness of tourism destinations in implementing a new custom order in Bali from the stakeholder side.

Overall, the readiness of the tourism destination CHSE protocol from managers in Bali Province shows good points of 51 percent, 46% is considered sufficient for the implementation of CHSE in Bali Province, the remaining 3% is considered still lacking in carrying out the CHSE protocol in Bali Province. The spatial pattern in Figure 1 is dominated by yellow and green zones which indicate a sufficient and good level of readiness spread across all districts in Bali Province. It was also found that red zones indicating less readiness were located in Jembrana, Tabanan, and Denpasar City.

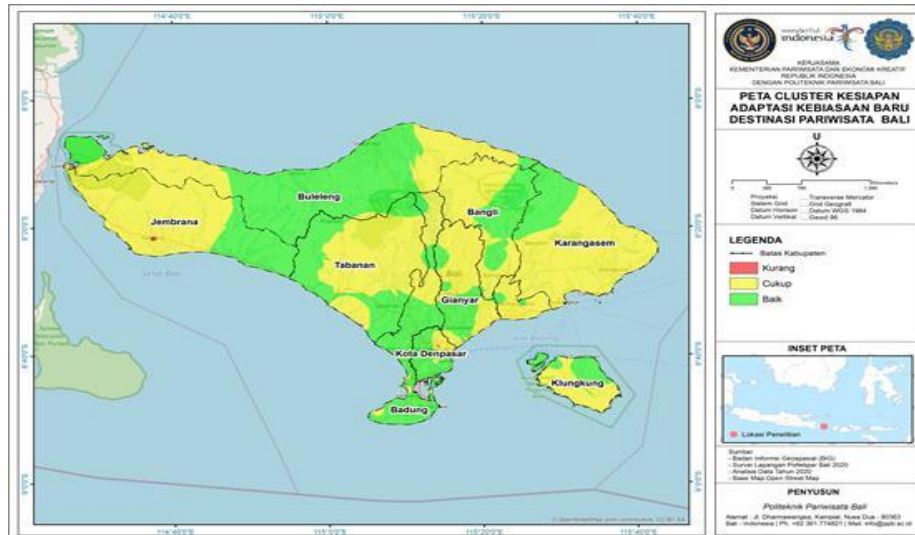


Figure 1 Cluster Map of Readiness Adaptation to New Habits of Tourism Destinations in Bali Province
Source: Researchers (2020)

In depth, the results showed good scores for several districts such as, Gianyar (55% sufficient and 45% good), Badung (35% sufficient and 65% good), Klungkung (63% sufficient and 38% good), Bangli (50 % sufficient and 40% good), Buleleng (17% moderate and 83 % good). Meanwhile, for the three regencies showed that there were less scores for the implementation of CSHE, namely Denpasar (7% less, 27% sufficient and 67% good), Tabanan (11% less, 33 enough, and 56% good) and Jembrana (17% less, 50 is sufficient, and 33% is good). This explains that, although there are shortcomings for some districts, in general the results show that the implementation of CHSE is good well in Bali Province.

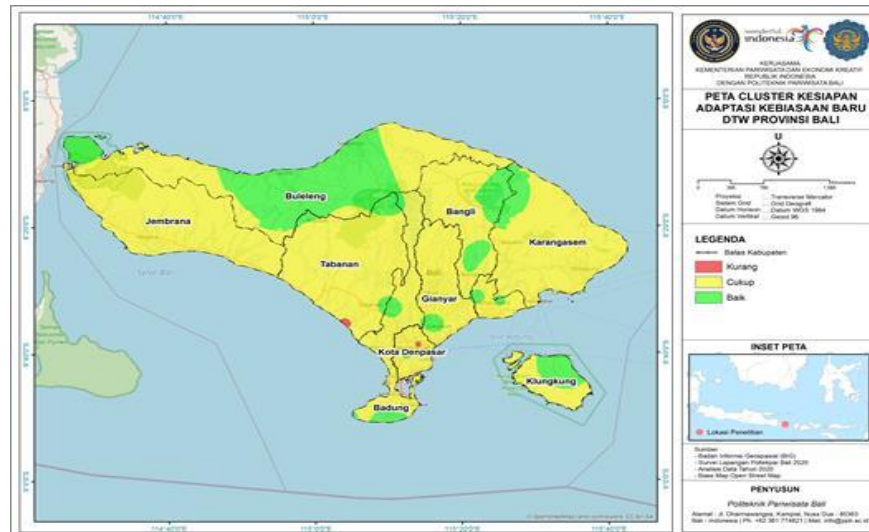


Figure 2. Map of Clusters of Readiness to Adapt New Habits of Tourist Attraction in Bali Province
Source: Researchers (2020)

The results of the study describe the assessment of the CHSE Protocol at tourist attraction with the following details; Gianyar (80% sufficient & 40% good), Badung (60% moderate & 40% good), Klungkung (75% sufficient & 25% good), Bangli (66.7% moderate & 33.3% good), and Jembrana and Klungkung (75 % is sufficient & 25% is good). Figure 2 shows that, Buleleng has the highest level of readiness for the CHSE protocol at tourist attraction (100% good). In detail, the province of Bali shows sufficient readiness (yellow zone). Meanwhile, the green zones with the category of good readiness are spread over the districts of Buleleng, Bangli, Klungkung, Karangasem, Gianyar and Badung. Meanwhile, the unprepared category is spatially located in the coastal part of Tabanan Regency and in Denpasar City.

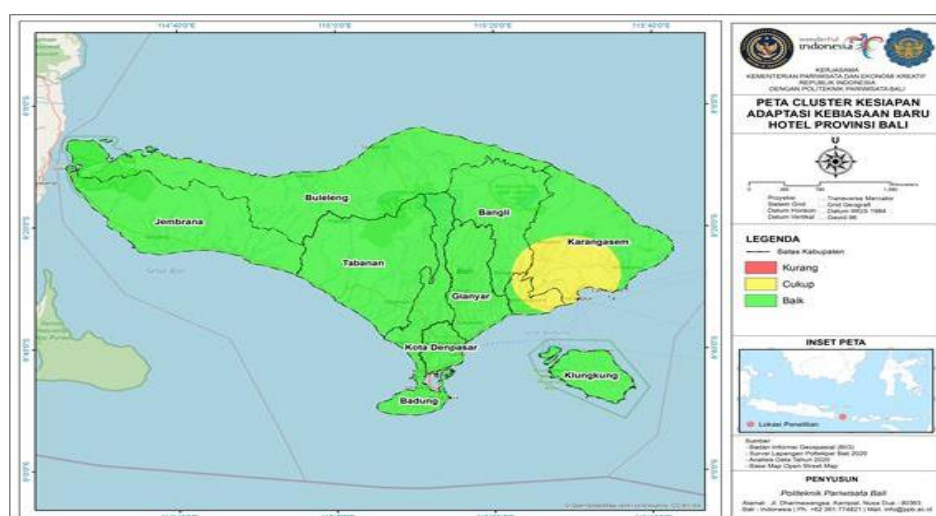


Figure 3 Cluster Map of Readiness to Adapt New Habits of Hotels in Bali Province
Source: Researchers (2020)

Based on Figure 3, the assessment of the implementation of the CHSE protocol on accommodation providers shows a 100% good score in Gianyar, Tabanan, Badung, Klengkung, Bangli, Buleleng, and Jembrana. Meanwhile, Karangasem (100% sufficient) and Denpasar (80% good & 20% sufficient) did not show more value, but remained at a sufficient and good level to face the COVID-19 pandemic. Based on the results of interviews, Karangasem's readiness has the highest percentage due to several considerations:

1. Limited funds to maximize health protocol facilities and infrastructure due to the lack of tourist visits to Karangasem;
2. Not yet optimal distribution of CHSE facilities and infrastructure assistance to destinations in Karangasem by the government; and
3. In general, the provision of CHSE facilities is still in the standard category.

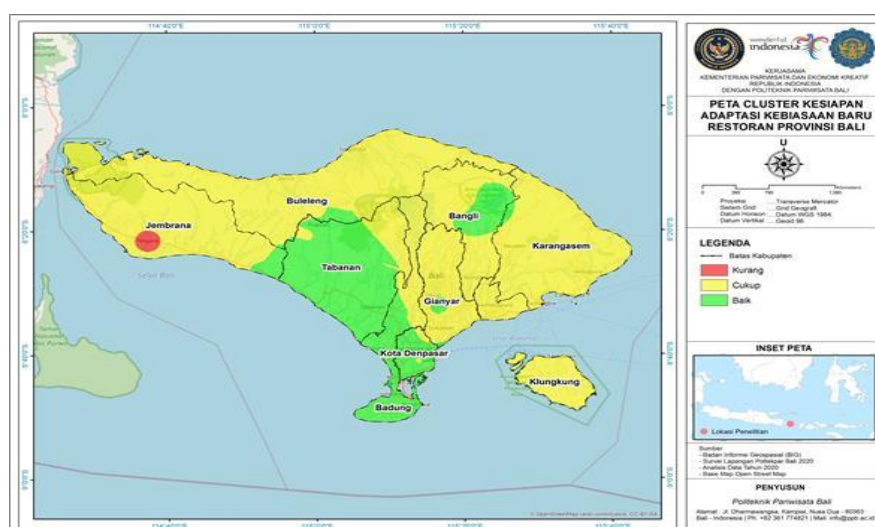


Figure 4 Map of Clusters of Readiness New Habits Adaptation of Restaurant in Bali Province

Source: Researchers (2020)

Figure 4 shows the clusterization of assessments of readiness for adaptation to new habits in restaurants in Bali Province. The Green Zone shows good conditions in Tabanan, Denpasar, Bangli and Badung Regencies, however, there is a red zone which indicates a poor category in Kota Negara Restaurant, Jembrana Regency. In detail, Gianyar (60% moderate & 40% good), Badung (20% adequate & 80% good), Bangli (50% sufficient & 50% good), and Denpasar (17% moderate & 83% good). All four have variations in readiness in the CHSE protocol, however, remain in sufficient readiness to welcome tourists during the ongoing COVID-19 pandemic.

Readiness of Tourism Destinations in Implementing a New Custom Order in Bali based on the perspective of tourist

The perspective of tourists related to satisfaction with the readiness of tourism destinations in implementing a new custom order in Bali is measured by the level of readiness and expectations of the dimensions of products, services, general protocol management, and destination attributes in the era of the new custom order.

In general, through Table 3 shows that, the dimension of destination attributes during the new habit order has the highest performance for tourists, which is 4.12 where tourists are satisfied with these dimensions.

Table 3
Respondents' Satisfaction with the Readiness of Tourism Destinations in Implementing a New Custom Order in Bali

No	Dimension	Mean
1	Product	3,98
2	Service	3,91
3	General Protocol Management	3,80
4	Destination Atribute	4,12
	Mean	3,95

(Source: Researcher, 2020)

The attributes of this destination can be seen from the uniqueness and diversity of attractions, the suitability of prices, facilities and services, as well as the ease of access during the new custom in Bali. Furthermore, the dimensions that show satisfied performance are product, service, and protocol management. For protocol management, it has the lowest average performance value of 3.80 compared to other dimensions. Therefore, management dimensions such as managing visitor capacity, availability of isolation rooms and evacuation routes for handling viruses need attention. Overall, tourist satisfaction with the readiness of tourism destinations in implementing the new custom order in Bali has an average value of 3.95. Where tourists are satisfied with the readiness of Bali tourism destinations during the new custom order.

In addition to the description of the level of satisfaction above, it is necessary to look at the level of expectations from tourists regarding the readiness of tourism destinations in implementing the new custom order in Bali. In this case the variables seen from each attribute are the same as the dimensions in tourist satisfaction.

Table 4
Respondents' Expectations on the Readiness of Tourism Destinations in Implementing a New Custom Order in Bali

No	Dimension	Mean
1	Product	4,17
2	Service	4,11
3	General Protocol Management	4,06
4	Destination Atribute	4,26
	Mean	3,95

(Source: Researcher, 2020)

Based on the results of the analysis in Table 4, it shows that the dimension of the destination attribute during the new habit order has the highest expectation for tourists, which is 4.26 where tourists feel that this dimension is important. Destination attributes consist of the uniqueness and diversity of attractions in Bali, the suitability of product prices,

facilities and services, as well as ease of access during the new custom in Bali. The manager is expected to be able to carry out this indicator well, because the results of the assessment show that the average satisfaction of the dimension attribute of the destination is still below the expectations of the tourists. An evaluation of the attribute dimensions of destinations in Bali is needed so that they can be better managed in accordance with the appropriate CHSE protocol. When comparing the results in tables 3 and 4, it can be seen that the average value of expectations is 4.15 and the average value of satisfaction is 3.95. This explains that, currently the expectations of tourists are still not fulfilled compared to the satisfaction felt from various dimensions related to the period of the new custom order in the province of Bali.

Figure 5 shows that, the location of the indicators that affect tourist satisfaction with the readiness of tourism destinations in implementing the new custom order in Bali is divided into four parts.

1. Quadrant I (Priority/Concentrate Here). Indicators of staff services in educating and encouraging the implementation of health protocols (X13) in practice need to be prioritized by the management because this indicator is considered very important and expected by tourists, but its actual performance still does not meet the expectations of tourists.

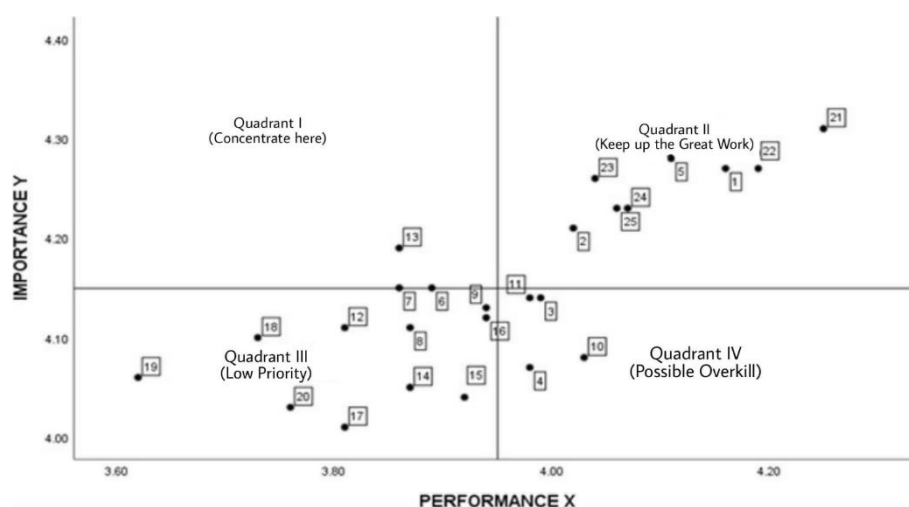


Figure 5 Results of the Cartesian Diagram Matrix
(Source: Processed Data, 2020)

2. Quadrant II (Maintain Achievements/Keep Up The Good Work). This quadrant is considered important and has met the expectations of tourists. These include a sink with running water taps and hand soap (X1); tissue/hand dryer (X2); Hand sanitizer in gel/liquid form (X5); Diversity and uniqueness of attractions, especially destinations (X21); Diversity and quality of accommodation/transportation/restaurant facilities, especially destinations (applying hygiene and health protocols during the COVID-19 pandemic) (X23); Service staff/officers at the destination (according to the SARS CoV-2) Virus prevention protocol (X24); and Price compatibility with products and services

during the Covid -19 pandemic (especially in the new normal era) (X25). These various indicators need to be maintained by the management because their existence is important according to tourists and the implementation of their performance has been carried out well.

3. Quadrant III (Low Priority). Various indicators located in quadrant III have a low level of performance and these indicators are not very important by tourists when compared to other indicators. Among these are the availability of several things, namely: Body temperature measuring device with infrared or digital system (X6); Masks/face shields that comply with standard protocols (X7); Health protocol advisory information board (X8); Non-cash payment facilities (X9); Staff services related to cleaning and disinfecting all facilities touched by visitors/tourists and employees (X12); posters calling for queue spacing and interaction (X14); a sign of seating distance arrangement in the form of an appeal sticker/poster (X15); The capacity setting sign is in the form of a sticker/poster (X16); Special evacuation flow for handling cases of the SARS CoV-2 Virus (X17); special isolation room for handling cases of the SARS CoV-2 Virus (X18); PPE that complies with the SARS CoV-2 Virus (X19) protocol standard; and Appeal markers for spitting, coughing and sneezing etiquette in the form of stickers or posters (X20). In quadrant III, various indicators have a relatively low level of expectation, and also in the implementation of their performance is low. This shows that tourists feel the quality of these indicators is not important compared to other indicators.
4. Quadrant IV (Excessive/Possible Overkill). This quadrant shows that these indicators have a high level of performance but the level of expectation is not so high. Among these are the availability of several things, namely: closed trash cans, especially in tourist attraction (X3); sign indicating the location of hand washing in any form that is easily visible (X4); Staff services related to checking or checking the body temperature of visitors/tourists (X10); and Staff services related to handling visitors/tourists who are detected to have a body temperature of 37.3 C or more (X11).

Staff services in educating and encouraging the implementation of health protocols (X13) should be a concern and a top priority. Sometimes, employees find it awkward to warn tourists when protocols are not being followed. In the current situation, the arrival of tourists is seen as a blessing. They are often afraid of disturbing tourists to reprimand or educate tourists who are active. Therefore, communication is needed to be able to increase tourist satisfaction without having to offend. In addition, through tourist reviews from digital media during the adaptation period, most of them talked about their satisfaction with destination attributes such as affordable prices, good hotel facilities and services, beautiful and irreplaceable views in Bali, peaceful Bali atmosphere, choices. diverse cuisine. In line with the IPA results, most of them place various destination attribute indicators in Quadrant II, namely maintaining achievement.

In particular, most tourists talk about Bali which has provided quite good service regarding health protocols at Bali Tourism Destinations. The quiet condition of visitors during the adaptation period of new habits is able to make many domestic tourists feel comfortable when traveling to Bali, especially to rural areas. In line with the IPA analysis, several indicators such as the availability of sinks and hand washing facilities are included

in Quadrant II. However, there are criticisms of cleanliness at tourist attraction which are still a finding. Overall, these findings are in line with the results of the assessment and mapping of tourism destination readiness. Where the tourist attraction component has a level of readiness with the lowest good category compared to hotels and restaurants.

Conclusion

Based on the discussion can be concluded in this study:

1. A study on the readiness of tourism destinations in implementing a new custom order in the province of Bali concerning the overall tourist attraction, hotels, and restaurants based on the results of the study identified that, the Province of Bali is in a state of readiness in implementing the adaptation of new habits. This can be seen from the 51% of the assessments of the implementation of the protocol indicating a good situation and as many as 46% indicating a fairly good situation. Meanwhile, 3% fall into the category of not yet ready.
2. Readiness of Bali Tourism Destinations from the perspective of tourists also shows a similar justification. This can be seen from the average value of tourist satisfaction which is quite high with the comparison value of expectations and satisfaction only being 0.2. Of all the indicators, indicator X13, namely the service of staff in educating and encouraging the implementation of health protocols, must be considered because it is included in quadrant I as the main priority quadrant, which means that the value of hope is high but the value of satisfaction is low. This is because the staff has not been able to choose the right communication method to tourists, so staff feel insecure and reluctant when reprimanding tourists regarding the implementation of health protocols.

Based on these conclusions, there are two recommendations :

1. This study recommends that the government and the community, especially the management of tourist attraction which is still carried out traditionally, should synergize more with digital-based Unicorns to be able to improve the quality of health protocol services in the adaptation of new habits in Bali. Cooperate in the form of infrastructure and assistance.
2. It is recommended to provide assistance to staff at DTW, restaurants, and hotels using a consumer psychology approach.

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