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Tourism Recovery and Structural Resilience in Indonesia After COVID-19

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Abstract

Indonesia's inbound tourism experienced a severe pandemic contraction followed by a rapid but nonlinear recovery between 2019 and 2025. This study examined the depth, speed, and remaining gap of that recovery using a longitudinal quantitative descriptive design based on official BPS-Statistics Indonesia data. Annual international visitor arrivals were analyzed through year-on-year growth, a 2019-based recovery index, recovery gaps, and phase-specific comparisons. Arrivals fell from 16.11 million in 2019 to 1.56 million in 2021 before rising to 15.39 million in 2025. The recovery index increased from 9.68 at the 2021 trough to 95.53 in 2025, leaving a gap of 0.72 million visits, or 4.47%, below the pre-pandemic benchmark. The findings show that Indonesia achieved substantial demand restoration, while growth moderated as the market approached its former scale. However, restored visitor volume does not automatically indicate structural resilience. Stronger resilience requires market diversification, crisis preparedness, digital capability, financial and workforce adaptability, and sustainable destination management. The study provides an empirical framework for distinguishing numerical tourism recovery from broader organizational, institutional, and destination-level resilience for future shocks and long-term sustainable tourism development strategies.

Keywords: *crisis resilience, inbound tourism, Indonesia, recovery index, tourism management.*

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INTRODUCTION

Tourism is highly vulnerable to external disruptions because its performance depends on human mobility, destination accessibility, traveler confidence, and the continuity of interconnected service industries. The COVID-19 pandemic exposed this vulnerability on an unprecedented scale by restricting international movement and generating simultaneous shocks to transportation, accommodation, attractions, and other tourism-related activities (Gössling et al., 2021; Hall et al., 2020). These conditions encouraged tourism scholars to reconsider recovery not merely as the restoration of visitor numbers but as a broader process involving adaptation, preparedness, organizational learning, and structural transformation (Sigala, 2020). Consequently, evaluating post-pandemic tourism performance requires attention to both the speed of demand recovery and the capacity of tourism systems to withstand future disturbances.

Indonesia represents an important context for examining this post-crisis trajectory because international tourism experienced an exceptionally severe contraction followed by a rapid but uneven recovery. International visitor arrivals declined from 16.11 million in 2019 to 4.02 million in 2020 and subsequently reached only 1.56 million in 2021, demonstrating the prolonged effects of mobility restrictions and travel uncertainty (BPS-Statistics Indonesia, 2021, 2022). Following border reopening and the gradual restoration of international connectivity, arrivals increased to 5.47 million in 2022, 11.68 million in 2023, 13.90 million in 2024, and approximately 15.39 million in 2025 (BPS-Statistics Indonesia, 2023, 2024, 2025, 2026). This sequence provides a comprehensive empirical trajectory through which the contraction, recovery acceleration, and normalization of Indonesian inbound tourism can be evaluated against the 2019 pre-pandemic benchmark.

Tourism resilience provides an appropriate theoretical foundation for interpreting this trajectory because resilience extends beyond short-term recovery toward the ability of organizations and destinations to absorb shocks, adapt operations, and retain essential functions. Orchiston et al. (2016)

explain organizational resilience through preparedness, leadership, networks, and adaptive capacity, whereas Sharma et al. (2021) emphasize technology, stakeholder participation, institutional support, and market confidence in post-pandemic tourism revival. Tourism crisis research similarly demonstrates that effective resilience involves interconnected stages of preparedness, response, recovery, and organizational learning rather than isolated reactions after disruption occurs (Ritchie & Jiang, 2019). From this perspective, increasing visitor arrivals may indicate demand recovery, but such growth cannot independently demonstrate whether the underlying tourism system has become more structurally resilient.

This distinction is particularly important because post-pandemic recovery can reproduce pre-existing vulnerabilities when policy and management focus primarily on restoring market volume. Brouder (2020) argues that tourism systems may follow different post-crisis pathways, ranging from a return to previous structures to more substantial institutional and economic transformation. Higgins-Desbiolles (2020) and Romagosa (2020) further emphasize that recovery should incorporate community interests, ecological sustainability, and alternative forms of tourism rather than concentrating exclusively on commercial growth. Similarly, Prideaux et al. (2020) contend that lessons from COVID-19 should support tourism systems that are more environmentally sustainable and less vulnerable to future economic, climatic, and mobility-related disruptions.

The significance of tourism recovery also extends beyond aggregate arrival statistics because the pandemic generated extensive consequences for businesses, workers, communities, and destination economies. Previous research documents substantial reductions in tourism demand, liquidity constraints, employment risks, and spillover effects across accommodation, transportation, food services, and tourism-related enterprises during the pandemic period (Škare et al., 2021; Abbas et al., 2021; OECD, 2020). Social and destination-level consequences were equally important because tourism disruption altered resident welfare and local economic dependence, while platform-based accommodation providers were also exposed to severe market instability (Qiu et al., 2020; Dolnicar & Zare, 2020). Therefore, tourism recovery represents not only a macroeconomic phenomenon but also a management challenge involving capacity restoration, market prioritization, business continuity, and the retention of adaptive capabilities developed during the crisis.

Changes in technology, consumer expectations, and risk perceptions further complicate the post-pandemic tourism environment. Tourism businesses accelerated the adoption of contactless services, digital platforms, automation, and robotics as mechanisms for maintaining operational continuity and responding to health-related concerns (Zeng et al., 2020). At the same time, traveler behavior became increasingly influenced by perceived health risks, uncertainty, destination safety, and changing expectations regarding service delivery, requiring stronger theoretical integration between tourism demand and crisis management (Zenker & Kock, 2020; Yang et al., 2020). These transformations indicate that the restoration of international mobility should be assessed alongside the managerial and technological adaptations that may determine the long-term capacity of tourism systems to respond to subsequent disruptions.

Although international tourism has progressively recovered, existing literature still provides limited longitudinal evidence distinguishing numerical demand restoration from structural resilience within specific national contexts. Global tourism indicators demonstrate a strong revival of international travel as restrictions were removed, yet global aggregates cannot reveal the precise extent to which individual countries have regained their pre-pandemic visitor scale or how the remaining recovery gap has evolved over time (United Nations World Tourism Organization [UNWTO], 2024; World Travel & Tourism Council [WTTC], 2024). Moreover, exceptionally high post-crisis growth rates may be statistically influenced by very low pandemic-era baselines, making them potentially misleading when interpreted without a fixed pre-crisis benchmark (Fotiadis et al., 2021; Assaf & Scuderi, 2020). A longitudinal recovery index based on a consistent benchmark can therefore provide a clearer empirical basis for distinguishing rebound intensity, restored tourism volume, and the remaining distance from pre-pandemic performance.

Based on this research gap, the present study examines Indonesia's inbound tourism recovery during 2019–2025 by measuring the depth of the pandemic contraction, the speed of recovery from the 2021 trough, and the remaining gap relative to the 2019 pre-pandemic benchmark. The analysis applies a recovery index, annual growth rates, and phase-based decomposition to distinguish the shock period, reopening acceleration, and subsequent normalization of international visitor arrivals. Unlike

approaches that equate increasing tourist arrivals with resilience, this study treats demand restoration as an observable outcome that must be interpreted separately from broader institutional, organizational, ecological, and destination-level resilience (Jiang et al., 2019; Gössling et al., 2021). The study therefore contributes an empirically transparent framework for evaluating tourism recovery while providing management implications concerning market diversification, crisis preparedness, adaptive capacity, and the development of a more resilient Indonesian tourism system.

RESEARCH METHODS

This study employed a longitudinal quantitative descriptive design using secondary data on international visitor arrivals to Indonesia from 2019 to 2025. The primary data were obtained from annual international visitor statistics and official tourism releases published by BPS-Statistics Indonesia for the 2020–2025 reporting periods, while 2019 was established as the pre-pandemic benchmark because it represented the final year before the global COVID-19 mobility disruption. The analysis focused on annual international visitor arrivals as the principal variable and applied three descriptive indicators, namely the recovery index, year-on-year growth rate, and recovery gap. The recovery index was calculated by dividing annual visitor arrivals by the 2019 arrival figure and multiplying the result by 100, while the recovery gap represented the difference between each annual observation and the 2019 benchmark; additionally, the compound annual growth rate for 2021–2025 was calculated to summarize expansion from the pandemic trough.

The analytical procedure divided the tourism trajectory into three phases consisting of the shock period in 2020–2021, reopening acceleration in 2022–2023, and normalization in 2024–2025. The study was descriptive rather than causal because it did not statistically estimate the independent effects of policy changes, airline capacity, exchange rates, destination promotion, or public-health conditions on tourism recovery. Data reliability was strengthened by consistently using information issued by BPS-Statistics Indonesia, retaining the officially reported annual figures, and reproducing all calculations in a structured analytical worksheet before rounding values for presentation. The resulting indicators were interpreted using established tourism crisis and resilience literature to assess the restoration of inbound tourism volume without assuming that numerical recovery alone demonstrates institutional, organizational, or structural resilience (Ritchie & Jiang, 2019; Sharma et al., 2021).

RESULTS AND DISCUSSION

Depth and Duration of the Pandemic Shock on Indonesian Inbound Tourism

The empirical results demonstrate that the COVID-19 pandemic produced an exceptionally deep contraction in Indonesia's inbound tourism market. International visitor arrivals decreased from 16.11 million in 2019 to 4.02 million in 2020, representing a year-on-year decline of approximately 75.05%. This contraction reduced the recovery index from the pre-pandemic benchmark of 100.00 to only 24.95 within a single year. The magnitude of this decline is consistent with international evidence showing that COVID-19 generated an unprecedented disruption to tourism through border closures, mobility restrictions, and declining traveler confidence (Gössling et al., 2021; Škare et al., 2021).

The crisis intensified in 2021 rather than ending after the initial pandemic year. International arrivals declined further to approximately 1.56 million, which was 61.19% lower than the already depressed 2020 level and represented only 9.68% of the 2019 benchmark. This finding identifies 2021 as the actual trough of Indonesia's international tourism demand and illustrates that the effects of tourism crises can persist beyond their initial onset. Continuing restrictions, limited international transport connectivity, and uncertainty surrounding cross-border travel contributed to prolonged disruption across tourism systems internationally (Yang et al., 2020; Zenker & Kock, 2020).

The recovery-index approach provides a clearer interpretation of this contraction than year-on-year percentage changes alone. A recovery index of 9.68 in 2021 indicates that more than 90% of Indonesia's pre-pandemic international visitor volume remained absent at the lowest point of the crisis. The difference between 16.11 million arrivals in 2019 and 1.56 million in 2021 generated an absolute recovery gap of approximately 14.55 million visits. Such a gap demonstrates why tourism recovery should be evaluated relative to a stable pre-crisis benchmark rather than merely through growth from an unusually low pandemic base (Fotiadis et al., 2021; Assaf & Scuderi, 2020).

The magnitude of the decline also demonstrates the systemic nature of the pandemic shock because tourism operates through highly interconnected economic activities. Reductions in

international arrivals immediately affected accommodation, aviation, transportation, food services, attractions, tour operators, and destination-based enterprises that depend directly or indirectly on visitor expenditure. Research on the pandemic period similarly documented severe liquidity constraints, employment losses, and business-continuity pressures throughout the travel and tourism industry (Abbas et al., 2021; OECD, 2020). Indonesia's arrival trajectory therefore represents more than a temporary demand fluctuation and instead indicates a major stress event affecting the wider tourism value chain.

Supporting indicators further illustrate the severity of the tourism-demand contraction during the first pandemic year. Star-hotel room occupancy in December 2020 was recorded at approximately 40.79%, substantially below the 59.39% recorded in December 2019, indicating that the reduction in international mobility was accompanied by weaker accommodation demand (BPS-Statistics Indonesia, 2021). The simultaneous deterioration of arrival and accommodation indicators shows that the crisis influenced multiple components of tourism consumption rather than a single statistical measure. This pattern corresponds with Sigala's (2020) assessment that COVID-19 affected tourism demand, organizational operations, customer relationships, and business models simultaneously.

Table 1. Depth of Indonesia's Inbound Tourism Shock and Early Recovery, 2019–2022

Year	International Arrivals (million)	YoY Change (%)	Recovery Index (2019 = 100)	Gap from 2019 (million visits)
2019	16.11	—	100.00	0.00
2020	4.02	-75.05	24.95	12.09
2021	1.56	-61.19	9.68	14.55
2022	5.47	250.64	33.95	10.64

Source: Author calculations based on BPS-Statistics Indonesia (2021, 2022, 2023).

Table 1 highlights the nonlinear nature of the shock and the early stage of recovery. The recovery gap expanded from 12.09 million visits in 2020 to 14.55 million in 2021, confirming that the tourism crisis continued to deepen during the second pandemic year. Although arrivals increased to 5.47 million in 2022 and produced an apparently extraordinary growth rate of 250.64%, the recovery index of 33.95 shows that approximately two thirds of the 2019 international visitor volume had still not returned. This contrast supports the argument that high post-crisis growth rates can overstate the strength of recovery when the calculation begins from an exceptionally low baseline (Fotiadis et al., 2021).

The depth and duration of the contraction provide an important test of organizational resilience within the tourism sector. Tourism enterprises with highly concentrated international markets, rigid cost structures, or limited financial reserves were likely to face greater adjustment pressures when visitor flows remained depressed for an extended period, although the aggregate data used in this study cannot directly measure individual firm outcomes. Organizational resilience literature emphasizes preparedness, leadership, collaborative networks, learning, and adaptive capacity as important resources for maintaining operations during severe disruption (Orchiston et al., 2016). The Indonesian case therefore illustrates why resilience should be understood as a capability developed before and during crises rather than as a label assigned after visitor numbers begin to increase.

The decline in visitor flows also generated implications extending beyond commercial tourism organizations. Tourism-dependent communities may experience substantial income and employment losses when demand disappears, while abrupt reductions in visitation can simultaneously reduce congestion and certain forms of environmental pressure at major destinations. Qiu et al. (2020) demonstrate that the social costs associated with pandemic tourism disruption extend to residents and destination communities, indicating that crisis consequences cannot be evaluated exclusively through firm-level revenues. Hall et al. (2020) similarly argue that the pandemic created an opportunity to reconsider how tourism systems balance economic recovery with broader social and structural objectives.

Technological adaptation became an important operational response during the crisis, although technology could not independently compensate for the disappearance of international mobility. Tourism businesses increasingly adopted digital communication, contactless payment, automated services, and other low-contact technologies to reduce physical interaction and respond to changing

consumer expectations (Zeng et al., 2020). These innovations could support business continuity, service efficiency, and traveler confidence, but their ability to generate demand remained constrained while borders and transport networks were restricted. The 2021 trough therefore demonstrates that digital capability and technological innovation must be complemented by broader market diversification, operational flexibility, and crisis-management capacity.

Overall, the 2019–2021 period represents a structural stress test for Indonesian inbound tourism, with the recovery index declining by approximately 90.32 points from the pre-pandemic benchmark to the crisis trough. The scale of the contraction distinguishes the pandemic from an ordinary cyclical slowdown and supports interpretations of COVID-19 as a system-level disruption capable of altering established tourism structures and managerial practices (Brouder, 2020; Lew et al., 2020). The initial rebound observed in 2022 marked an important transition toward recovery, but the remaining 10.64 million-visit gap confirms that market restoration was still incomplete at that stage. These findings establish the empirical foundation for examining the subsequent reopening acceleration and determining whether rapid numerical recovery translated into a more durable and resilient tourism trajectory.

Reopening Acceleration and the Dynamics of Tourism Recovery

Indonesia's inbound tourism entered a clear reopening phase in 2022 after reaching its lowest point in 2021. International visitor arrivals increased from 1.56 million in 2021 to 5.47 million in 2022, equivalent to year-on-year growth of approximately 250.64%. Despite this exceptional percentage increase, the recovery index reached only 33.95, indicating that almost two thirds of the 2019 visitor volume had not yet returned. This pattern confirms that early post-crisis growth must be interpreted cautiously because exceptionally low base values can produce very large percentage increases without representing full market restoration (Fotiadis et al., 2021; Prayag, 2020).

The recovery accelerated further in 2023 when Indonesia recorded approximately 11.68 million international visitor arrivals. This represented growth of about 113.53% from 2022 and increased the recovery index from 33.95 to 72.50 within a single year. The expansion reflected the normalization of cross-border travel, restoration of international routes, and stronger traveler confidence as pandemic-related restrictions were progressively removed (BPS-Statistics Indonesia, 2024). Comparable global trends were reported by UN Tourism, which documented substantial recovery in international tourism as mobility restrictions eased and international connectivity improved (United Nations World Tourism Organization [UNWTO], 2024).

The scale of the 2022–2023 rebound demonstrates that restoration of accessibility was a central mechanism in the early recovery period. In only two years, annual arrivals increased by more than 10 million compared with the 2021 trough, showing that latent international demand could return rapidly once major mobility barriers were removed. Sharma et al. (2021) argue that post-pandemic tourism revival depends on a combination of traveler confidence, institutional support, technological capability, and adaptive business practices. The Indonesian evidence supports this interpretation while also indicating that restored access and released pent-up demand were particularly important contributors to the initial numerical acceleration.

The compound annual growth rate from the 2021 trough to 2025 was approximately 77.23%, but this value should not be interpreted as a sustainable long-term tourism growth rate. Such a high CAGR is strongly affected by the unusually low level of international arrivals recorded during the crisis trough. Assaf and Scuderi (2020) emphasize that tourism recovery after COVID-19 should be understood within the exceptional conditions created by the pandemic rather than compared directly with conventional periods of industry expansion. Accordingly, the CAGR is more useful as an indicator of recovery intensity than as a forecast of normal future growth.

The rapid return of visitor flows also depended on the reactivation of tourism supply capacity. International demand could not be converted into realized arrivals without operational airlines, accommodation facilities, tourism workers, transportation services, attractions, and border-processing infrastructure. The restoration of these components occurred after a period in which tourism enterprises had faced severe liquidity, labor, and operational pressures, meaning that reopening required both market demand and functioning supply systems (OECD, 2020; Ritchie & Jiang, 2019). The strong increase observed between 2021 and 2023 therefore reflects not only renewed traveler demand but also the ability of tourism-related organizations to restore operational capacity.

Table 2. Recovery Dynamics of Indonesian Inbound Tourism, 2021–2025

Year	International Arrivals (million)	YoY Change (%)	Recovery Index (2019 = 100)	Gap from 2019 (million visits)
2021	1.56	-61.19	9.68	14.55
2022	5.47	250.64	33.95	10.64
2023	11.68	113.53	72.50	4.43
2024	13.90	19.01	86.28	2.21
2025	15.39	10.72	95.53	0.72

Source: Author calculations based on BPS-Statistics Indonesia (2022, 2023, 2024, 2025, 2026).

Table 2 demonstrates that Indonesia's tourism recovery was strongly nonlinear, with extremely rapid growth during reopening followed by progressively lower growth as visitor numbers approached their pre-pandemic level. The recovery gap narrowed from 14.55 million visits in 2021 to 4.43 million in 2023, while the recovery index increased by approximately 62.82 points over the same period. This transition is consistent with tourism-crisis research showing that recovery processes commonly pass through distinct stages rather than following a constant linear trajectory (Jiang et al., 2019; Ritchie & Jiang, 2019). The results therefore justify separating the reopening phase from the later normalization phase when evaluating post-pandemic tourism performance.

Market composition represents an important dimension that aggregate recovery statistics cannot fully capture. A national increase in international arrivals may be concentrated among a limited number of origin markets, destinations, or international gateways, leaving the overall system exposed to future disruptions despite strong aggregate performance. Tourism resilience literature emphasizes diversification as an important mechanism for reducing dependence on narrow demand sources and strengthening the capacity of destinations to withstand external shocks (Prayag, 2020; Sharma et al., 2021). For Indonesia, monitoring source-market concentration, route dependence, seasonality, and regional distribution is therefore necessary alongside aggregate arrival growth.

Digital capability also changed from an emergency response mechanism during the pandemic into a potential source of competitive advantage during reopening. Technologies initially introduced to reduce physical contact could subsequently support online distribution, dynamic pricing, customer communication, destination information, and more efficient service delivery. Sigala (2020) argues that COVID-19 accelerated experimentation with digital business models, while Zeng et al. (2020) demonstrate how tourism organizations adopted automation and low-contact technologies in response to crisis conditions. The management challenge is therefore to convert short-term emergency digitization into durable capabilities that improve productivity and customer experience after normal mobility has resumed.

Rapid tourism recovery may nevertheless recreate several vulnerabilities that existed before the pandemic. Large increases in visitor flows can intensify congestion, environmental pressures, infrastructure demand, and unequal benefit distribution if destination capacity does not expand or become more effectively managed. Higgins-Desbiolles (2020) argues that tourism recovery should incorporate social and ecological objectives, while Prideaux et al. (2020) emphasize that post-pandemic rebuilding provides an opportunity to develop less vulnerable and more sustainable tourism systems. The Indonesian recovery should consequently be accompanied by destination-capacity management rather than treated exclusively as a promotional challenge aimed at maximizing visitor numbers.

The reopening period also illustrates the strategic role of domestic and proximity tourism as complementary sources of market stability. Although domestic tourism cannot perfectly replace international visitor expenditure, it can reduce dependence on cross-border mobility during periods when international travel becomes constrained. Romagosa (2020) identifies proximity tourism as an important pathway for strengthening sustainability and resilience after COVID-19, particularly by connecting tourism demand more closely with accessible regional markets. For Indonesian tourism managers, combining international market restoration with stronger domestic-demand capabilities may improve portfolio resilience and reduce exposure to future external disruptions.

Overall, the 2022–2023 period represented a decisive transition from crisis survival to accelerated market restoration, but the subsequent moderation in 2024 and 2025 indicates that the recovery mechanism changed as Indonesia approached its former tourism scale. The increase in the recovery

index from 9.68 in 2021 to 72.50 in 2023 demonstrates exceptionally rapid restoration, yet numerical growth alone cannot establish that tourism organizations and destinations became structurally more resilient. UNWTO (2024) and WTTC (2024) document a broader global restoration of tourism activity and economic contribution, but national resilience ultimately depends on preparedness, diversification, adaptive capacity, and sustainable destination governance. These findings provide the basis for the next subsection, which examines near-restoration by 2025 and evaluates its implications for structural tourism resilience.

Near-Restoration by 2025 and Implications for Structural Tourism Resilience

Indonesia's inbound tourism recovery entered a normalization phase in 2024 as international visitor arrivals reached approximately 13.90 million. This figure represented year-on-year growth of 19.01% and increased the recovery index to 86.28, substantially closer to the 2019 benchmark than the 72.50 recorded in 2023. The slowing growth rate compared with the triple-digit increases observed during 2022 and 2023 reflects the mathematical transition from an exceptionally low crisis base toward a more normalized market scale. Such a trajectory corresponds with tourism recovery literature emphasizing that post-crisis expansion generally moderates as suppressed demand is absorbed and mobility conditions stabilize (Assaf & Scuderi, 2020; Fotiadis et al., 2021).

The recovery strengthened further in 2025 when international arrivals increased to approximately 15.39 million. This level corresponded to a recovery index of 95.53, leaving Indonesia only 0.72 million visits, or approximately 4.47%, below its 2019 international visitor volume (BPS-Statistics Indonesia, 2026). The result indicates that almost all of the inbound tourism demand lost during the pandemic had been quantitatively restored by the end of the observation period. Nevertheless, near-restoration of aggregate visitor volume cannot independently demonstrate whether firms, destinations, institutions, and communities developed greater capacity to withstand future disturbances (Orchiston et al., 2016; Prayag, 2020).

The declining year-on-year growth rate from 113.53% in 2023 to 19.01% in 2024 and 10.72% in 2025 should therefore not be interpreted automatically as deteriorating tourism performance. Absolute arrivals continued to rise in both years, while the recovery gap relative to 2019 consistently narrowed. This distinction demonstrates the analytical advantage of evaluating growth rates together with recovery indices and absolute visitor levels rather than relying on a single performance indicator. Tourism crisis research similarly recommends multidimensional evaluation because the apparent speed of recovery can differ considerably depending on the benchmark and measurement framework applied (Ritchie & Jiang, 2019; Jiang et al., 2019).

Near-restoration also changes the primary management challenge from rebuilding basic market access toward improving the durability and quality of tourism growth. When visitor volume approaches its previous peak, competitive performance increasingly depends on destination quality, labor capability, infrastructure, service innovation, market diversification, and organizational preparedness. Sharma et al. (2021) conceptualize tourism resilience as an integration of technological, institutional, community, and operational capabilities rather than a simple return to previous demand levels. Consequently, the 95.53 recovery index should be interpreted as evidence of strong demand restoration while structural resilience remains a broader managerial issue requiring direct capability-based assessment.

The 2025 data also provide additional evidence that tourism activity had moved considerably closer to normal operating conditions. BPS-Statistics Indonesia (2026) reported approximately 1.41 million international visitor arrivals in December 2025, while the star-hotel room occupancy rate reached 56.12% during the same month. These indicators suggest a substantial restoration of both international mobility and accommodation demand when compared with the severe disruption observed during the pandemic period. The contrast with the unprecedented global contraction documented by the United Nations World Tourism Organization (2020) demonstrates the considerable scale of the recovery achieved over the six-year observation period.

Table 3. Normalization and Remaining Recovery Gap in Indonesian Inbound Tourism

Indicator	2023	2024	2025
International arrivals (million)	11.68	13.90	15.39
YoY growth (%)	113.53	19.01	10.72
Recovery index (2019 = 100)	72.50	86.28	95.53
Gap from 2019 (million visits)	4.43	2.21	0.72
Gap from 2019 (%)	27.50	13.72	4.47

Source: Author calculations based on BPS-Statistics Indonesia (2024, 2025, 2026).

Table 3 demonstrates that the remaining recovery gap decreased substantially during the normalization phase, from 4.43 million visits in 2023 to only 0.72 million in 2025. The simultaneous reduction in percentage growth and recovery gap confirms that deceleration primarily reflected movement toward the pre-pandemic benchmark rather than a reversal of the recovery process. Global tourism indicators also showed substantial restoration of tourism activity and economic contribution during this period, placing Indonesia's trajectory within a wider international recovery pattern (United Nations World Tourism Organization [UNWTO], 2024; World Travel & Tourism Council [WTTC], 2024). However, global and national improvements should not obscure differences among individual destinations, tourism businesses, labor markets, and source-market structures.

Market diversification remains particularly important because aggregate visitor restoration can coexist with dependence on a limited number of international origins or transport gateways. Heavy reliance on particular markets increases exposure to geopolitical disruptions, economic downturns, health emergencies, and aviation shocks affecting those specific sources. Romagosa (2020) emphasizes the potential role of proximity and domestic tourism in strengthening tourism systems, while Brouder (2020) argues that post-crisis tourism can either reproduce existing structures or move toward more adaptive configurations. Indonesia can therefore use the near-complete restoration of international tourism as an opportunity to strengthen domestic demand, broaden international source markets, and reduce concentrated exposure to future mobility disruptions.

Sustainability constitutes another important dimension because returning visitor volumes can reactivate environmental and social pressures that temporarily diminished during the pandemic. Congestion, waste generation, water demand, infrastructure pressure, carbon-intensive transportation, and resident dissatisfaction can intensify when destination growth occurs without appropriate carrying-capacity management. Higgins-Desbiolles (2020) emphasizes socially and ecologically responsible tourism recovery, while Prideaux et al. (2020) argue that pandemic lessons should support structural transformation toward tourism systems better prepared for environmental and climate-related challenges. Near-restoration should consequently be accompanied by destination-level governance that evaluates economic benefits together with environmental capacity and community welfare.

Digital transformation and organizational learning should similarly be retained after the immediate crisis conditions disappear. Technologies adopted during the pandemic for contactless interaction, automated services, digital communication, and online distribution can provide enduring benefits when integrated into routine operational and customer-management systems (Sigala, 2020; Zeng et al., 2020). The pandemic also demonstrated that tourism organizations require flexible processes capable of responding rapidly to changes in traveler risk perceptions, health conditions, and mobility regulations (Yang et al., 2020; Zenker & Kock, 2020). Structural resilience therefore depends on converting emergency innovations into permanent managerial capabilities rather than abandoning them once visitor flows return.

Financial and operational preparedness are equally important because restored demand does not necessarily eliminate vulnerabilities accumulated during an extended crisis. Tourism businesses that survived prolonged revenue reductions may continue to experience weakened balance sheets, workforce shortages, disrupted supplier relationships, or deferred investment even after customer demand improves (Abbas et al., 2021; OECD, 2020). Dolnicar and Zare (2020) demonstrate that even digitally mediated accommodation models were vulnerable to the pandemic shock, while Qiu et al. (2020) show that tourism disruption generated broader social costs for destination communities. Resilience policy should therefore combine demand development with business continuity planning, financial buffers, workforce retention, supplier flexibility, and institutional coordination.

Indonesia's 2019–2025 trajectory demonstrates a tourism system that absorbed an unprecedented collapse and subsequently restored almost all of its pre-pandemic international visitor volume. The recovery supports evidence of strong demand resilience, but it should not be equated automatically with comprehensive structural resilience because vulnerabilities related to concentration, sustainability, organizational capacity, and preparedness may remain (Gössling et al., 2021; Hall et al., 2020). Lew et al. (2020) argue that major disruptions can reshape tourism systems rather than simply interrupt them, making post-crisis learning essential for determining whether recovery produces meaningful transformation. Indonesia's strategic priority should therefore move beyond restoring visitor numbers toward consolidating diversified markets, adaptive organizations, digital capability, stronger crisis coordination, sustainable destination management, and institutional learning capable of reducing vulnerability to future shocks.

CONCLUSION

Indonesia's inbound tourism recovery between 2019 and 2025 demonstrates a clear transition from severe contraction to rapid reopening and subsequent normalization. International visitor arrivals declined from 16.11 million in 2019 to only 1.56 million in 2021 before recovering to 15.39 million in 2025, equivalent to a recovery index of 95.53. The remaining gap of approximately 0.72 million visits, or 4.47% below the pre-pandemic benchmark, indicates that international tourism demand had almost completely returned by the end of the observation period. Nevertheless, the findings confirm that numerical restoration of visitor arrivals should not be interpreted automatically as evidence of comprehensive structural resilience.

The recovery trajectory highlights the importance of transforming post-crisis demand restoration into stronger long-term tourism capabilities. Tourism managers and policymakers should strengthen market diversification, domestic-demand buffers, crisis preparedness, digital capability, business continuity, workforce adaptability, and sustainable destination management to reduce vulnerability to future disruptions. Particular attention should also be directed toward environmental capacity, community welfare, financial resilience, and institutional learning as visitor volumes return to pre-pandemic levels. Future research should extend the present analysis using monthly data, origin-country patterns, airline capacity, hotel performance, business survival indicators, and destination-level sustainability measures to identify the determinants of tourism resilience more comprehensively.

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