

TOURISM AND DISASTER: THE REVIEW OF GOVERNMENT POLICY TOWARD THE IMPACT OF NATURAL DISASTER ON TOURISM INDUSTRY PERFORMANCE

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Bogor Over the last decade, a number of disaster have affected Indonesia as the tourist destination. This article provides the analysis of the relation between tourism and disaster and frames the impact of natural disaster (hazards) to the performance of tourism industry in Indonesia under the perspective of sustainable development. It shows that Indonesian Government prepare the strategy to cope with the natural disaster but low response in tourism sector recovery. The article concludes that since tourism is very vulnerable sector, which mainly influence by the internal aspect and external aspect, the need of crisis management related to natural disaster is needed.

disaster, planning, tourism, industry, performance

INTRODUCTION

Over the last decade, a number of disaster have affected tourist destination. However, at the same time the tourists industry is continuing grow, locally and globally. The growth of tourism has been a major source of economic development in many countries. The international tourism trend shows that the tourist arrival in Europe is decreased but the market in Asia-Pacific region is increasing. Since 2004, the Asia-Pacific region tourist arrival is behind Europe. The increasing number of tourist visitation gives positive impact to the growth in expenditure which is positive to developing countries in Asia especially Indonesia which has thousand island, beautiful scenery and at the same time is threatening by natural hazards. Natural hazard can be a threatening and also can be the opportunities as attraction in another ways. However in this article the author would like to analyse the relation of tourism and disaster in the threatening aspect. Therefore, the event of disaster should be managed with comprehensive mitigation to minimize the impact of disaster to the community and tourist industry.

Tourist industry is the economic sector that depends on the image of the destination. Bad image of destination will directly influence the tourist industry performance. As known that the world is unpredicted, which mean turbulence would trigger crisis in tourism industry. The characteristic of tourism put them in the vulnerable sector, which is impacted by external and internal factors. Compare to other business, tourism is more vulnerable to the crisis, because other business sectors able to do so with less effort than the tourism and travel industry (Peattie and Moutinho 2000, 17-38).

This article would like to provide the analysis of the relation between tourism and disaster and frame the impact of natural disaster (hazards) to the performance of tourism industry in Indonesia under the perspective of sustainable development.

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LITERATURE REVIEW

Natural Disaster and Tourism

Many researchers recommend tourism industry to become more aware to the natural disaster (Pforr and Hosie 2008, 249-264; Blackman and Ritchie 2008, 45-57). This is a consequence of the sensitive and uniqueness of tourism sector. Tourist destination is defined by specific amalgamations of environmental resources both natural and manmade, which include the factor of robustness of those resources. It should be supported by appropriate policies for the management and development of tourism considered.

Disaster management in a tourism context embraces business objective as well as concerns about the well being of destinations communities and visitor population (Anuar et al. 2012, p69; Drabek 1995, 7-23; Murphy and Bayley 1989, 36-46; Tsai and Chen 2010, 470-481). Managing the tourism is not only merely about managing its development but also managing during crisis. It is very little literature discuss about managing tourism sector in crisis especially in crisis due to natural disaster. According to Ritchie (2009) there are three main stages in managing such incidents on tourism; 1) prevention and planning; 2) implementation; 3) evaluation and feedback (Ritchie 2009). This stage is mostly following the disaster lifecycle introduced by Baker et., al (2014). Moreover, there are visible similarities between the lifecycle of crisis/disaster and the strategic planning or management framework. A lot of research focuses on the recovery process after the disaster and measuring the vulnerability, however the government and stakeholder planning are very limited in the discussion. This attitude raises attention about unpreparedness of early warning system in tourism industry.

DISCUSSION

Indonesia Tourism Industry Performance during Crisis

Indonesia, as the developing countries is facing the challenge in employment creation and balance of payments deficits; regard tourism as one of the most promising means of increasing foreign exchange earnings and creating more jobs. Tourism in Indonesia is difference with other sectors. In the past, before 1990 travel and tourism services do not face the marketing problems (Booth 1990, 45-73). In order to analyse the market of Indonesia tourism one need to see how the foreign country restricts or warning their citizens to visit Indonesia. Those restrictions are related to the issues that happen in the destination and in origin of the country.

Compare to ASEAN countries the number of foreign tourist visitation in Indonesia do not show high rank. Malaysia is the highest number of tourist in 2012, followed by Thailand and Singapore. Hence, Indonesia is in number four for about 8,044,500 visitors. Indonesian tourist industries have to compete with manmade tourism innovation like in Singapore, strong promotion like as Malaysia and Thailand. The tourist attraction between ASEAN countries is relatively similar, such as sunshine, exotic scenery and wildlife. Indonesia has benefited from tourism as well as other ASEAN countries especially in foreign tourist arrivals and in foreign exchange earnings. Table below shows the growth of foreign tourism in ASEAN region from 2009 – 2012.

Table 1. Growth of Foreign Tourism in ASEAN Region ('000)

Country	2009	2010	2011	2012
Brunei Darussalam	157,5	214,3	242,1	209,1

Country	2009	2010	2011	2012
Cambodia	2.161,6	2.508,3	2.881,9	3.584,3
Indonesia	6.323,7	7.002,9	7.649,7	8.044,5
Lao PDR	2.008,4	2.513,0	2.723,6	3.330,1
Malaysia	23.646,2	24.577,2	24.714,3	25.032,7
Myanmar	762,5	791,5	816,4	1.059,0
Philippines	3.017,1	3.520,5	3.917,5	4.272,8
Singapore	9.681,3	11.638,7	13.171,3	14.491,2
Thailand	14.149,8	15.936,4	19.098,3	22.353,9
Vietnam	3.772,3	5.049,9	6.014,0	6.847,7
ASEAN	65.680,3	73.752,6	81.229,0	89.225,2

Source: ASEAN Tourism Statistic Database, 2014

Dropping Number of Tourist during Crisis

In this article we are going to examine the tourism industry performance in last 13 years. In order to find the insight of what the cause of dropping and increasing, especially to give us more understanding of crisis in tourism statistic data is needed. The data of number of visitation foreign tourist during 2000 – 2013 can be seen in the chart below.

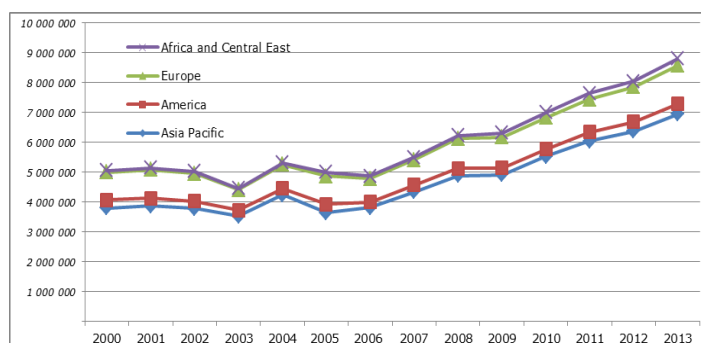


Figure 1. Number of Visitation Foreign Tourist during 2000 - 2013

The number of tourist visitation during 2000 – 2013 tends to increase. However the dropping period is reported two times in 2003 and 2005. Many researchers assume that the decreasing number of tourist is 2003 due to the terrorist attack in Bali at 2002. Moreover the decreasing number of tourist in 2005 was the impact of tsunami Aceh at December 2004. Based on the geographical region segmentation, the foreign tourists from Africa and Middle East are the highest number. European, American and the Asia Pacific follow it. After three years of tsunami the number of tourist back to normal and increase simultaneously until 2013. Through this data we can see that the tsunami in Aceh put tourism in the lower level and it took three years for recovery to the normal number of tourists.

Dropping Length of Stay during Crisis

Hotels are the most easily identified tourist facility, since by definition, only tourists use them. The number of accommodation, room and beds from 2000 – 2014 is increasing significantly; the average growth is 8% per year. However, in 2004 and 2005 the growth of accommodation was the lowest in 10 years. And the highest growth of accommodation

was in 2010 at 14% per year. The increasing number of rooms and beds follows the growing of accommodation. Based on the Statistic Data (2014), the number of accommodation was dropped 1 %, from 1,055 to 1,041. If we want to draw connection between the dropping number of accommodation, rooms and bed in 2007 we would find that in 2007 there was several hazards hits Indonesia, such as West Sumatra (7,9 SR) earthquake, Bengkulu earthquake, Mentawai island earthquake and flood in Jakarta. In West Sumatra the number of hotels was reported damaged by earthquake, as well as in Mentawai Island as the tourism spot for surfing.

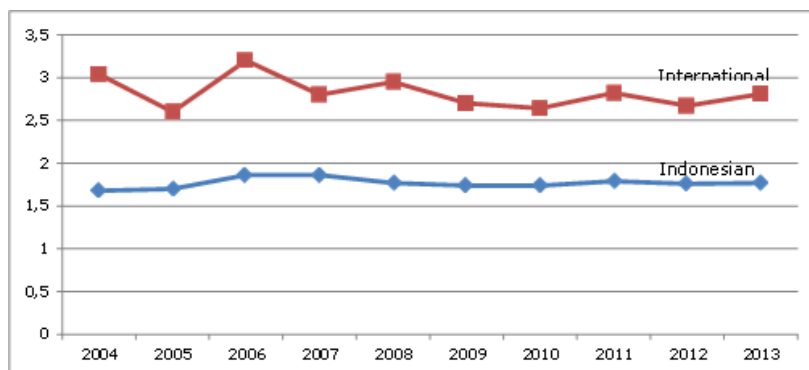
The number of domestic tourist stay in star hotel is higher than foreign tourist. From 2012 to 2013 the growth of tourist stay in Star Hotel is higher than previous year. It is related to the increasing number of middle class income of the Indonesian citizen. It is reported that middle class was 37% of the population in 2004, but increase at 56,7% from the total population in 2013. I assumed that the increasing number of middles class income of Indonesian influence their willingness to pay for travel and staying in four star hotel. In Indonesia, the middle class is calculated by their daily expenses that more than 2 USD/day and less than 20 USD/day. Besides the increasing number of Indonesian stay in star hotel, the increasing number of middle class is also seen in several statistic data such as increasing motor bike ownership, increasing flight frequency, increasing computer ownership and increasing number of housing ownership.

The number of Indonesian stay in star hotel is increasing and the number of Indonesian stay in non-star hotel is also growing. Compare to the foreign tourist, the increasing number of Indonesian tourist is very dynamic. It was dropped in 2005 due to the tsunami disaster in Aceh that influence the decision to travel at that moment. It took for about two years to back in normal number of tourist for non-star hotel to attract the tourist. Before tsunami in 2004, the number of tourist stay in non-star hotel was dropped significantly in 2003 due to the terrorist attack at 2002.

The length of stay of tourists staying in Non-Star Hotel at 2004 – 2013 is fluctuating. We can see based on the Statistic Data 2014, the foreign tourist stay in non-star hotel increase very little from 2004 – 2006, drop in 2007, increase again in 2008, dramatically drop in 2009, steady in 2010, increase relatively high in 2011, drop again in 2012 and increase a little in 2013. However, the pattern of length of stay of domestic tourist is different with international tourist. The domestic tourist length of stay relatively stable even though slightly down in 2005 due to the tsunami disaster.



Figure 2. Length of Stay in Non-Star Hotel at 2004 – 2013



Source: Statistic Indonesia, 2014

Figure 3. Length of Stay in Star Hotel at 2004 – 2014

The length of stay foreign tourist in Indonesia can be seen based on the origin of the visitors. Chart above shows the average of length of stay tourist in Indonesia. It shows the longest length of stay is tourist from Central America in 27 days, Nederland is the second longest at 18 days which almost similar to Austria and Belgium. Country like Japan, Korea, Pakistan, Bangladesh, Sri Lanka, Taiwan, China and Arabic were staying for about 5 – 10 days in Indonesia. France, Germany, Italia, Spain, UK, Finland, Russia, US, Canada, Australia and New Zealand stayed in Indonesia for about 10 – 15 days. Hence the shortest visit is Singapore at 5 days.

Tourism is an industry where both demand and supply can be sensitive to security and safety incidents (Pizam and Mansfeld 1996). Based on the data, we gain clear explanation about how such event like as terrorist attack and natural hazard influence tourism industry performance. In many cases the incident such as natural disaster, security and safety influences the tourists' perception of risk. In recent years the concept of tourists' risk perception has gained attention (Jonas et al. 2010). The fear and incident play significant role in forming the perception of risk especially for destination. In consequence it would shaping the tourist behaviour (Jonas et al. 2010; Sheng-Hsiung, Gwo-Hsiung, and Kuo-Ching 1997, 796-812; Sönmez, Apostolopoulos, and Tarlow 1999, 13-18).

Factor Influence the Tourism Performance

The changed influence Indonesian tourism industry can be categorized in four aspects include; origin pushes, destination pull factors, repellents and destination pull response tactics (Prideaux, Laws, and Faulkner 2003, 475-487). Origin pushes is understood as Indonesia became more competitive as the value of the rupiah fell during the Asian financial crisis. Destination pull factors can be analyzed on the greater buying power as a result of Asian financial crisis which rupiah was falling value. Repellant examples are smoke haze, political unrest, ethnic violence, religious violence, rebellions and terrorist attack. Furthermore, the destination pull response tactics include discount holiday package, open visa for ASEAN countries and rebranding country Wonderful Indonesia.

Natural Hazards

The trend of natural disaster in Indonesia shows the increasing frequency and number of victims. According to the BNPB, Java Island is the highest number of disaster events during 1815 – 2014. In addition, flood is the most frequent compare to others. The second frequent is strong winds and landslide. Indonesian Disaster Reduction Board recorded other disaster such as volcano eruption, epidemic, earthquake, tsunami, drought, conflict,

terrorism, and transportation accident, plague, landslides, forest-fire and industrial accident.

Terrorist Attack

The number of terrorist attack in Indonesia have been counted more often compare to other countries in South East Asia. According to local newsletter there were a lot of terrorist attack in Indonesia.

- 1981 : Hijack the Garuda Indonesia Airline
- 1985 : The boom in Borobudur Heritage Site
- 2000 : The boom in Philippine Embassy, Malaysian Embassy, Jakarta World Trade Center, and Christmas Boom in several cities
- 2001 : Boom in Church, Atrium Plaza Senen, KFC restaurant, and Australia School
- 2002 : Boom in Bali, McDonalds Restaurant
- 2003 : Boom in Police Office, Soekarno Hatta Airport, and JW Marriott Hotel
- 2004 : Boom in Palopo, Australia Embassy, Immanuel Church East Sulawesi
- 2005 : Boom in Ambon, Tentena, Pamulang, Bali, and Palu Market
- 2009 : Book in Ritz Carlton Jakarta
- 2010 : Shooting civilian in Aceh and Bank robe
- 2011 : Boom in Cirebon, Gading Serpong, and Solo
- 2012 : Boom in Solo

Indonesian Tourism Development Policy

Natural disaster have power to create chaos for the tourism industry by generate the low number of tourist visitation, coping with this problem is not easy for public and private agencies (Laws and Prideaux 2006, 1-8). The data in previous discussion shows how the impact of natural disaster and terrorist attack, which mean the security and safety issue, influence the performance of tourism industry. Following the frequency of disaster event and considering the risk of natural disaster to the tourism sector and in order to deal with the situation there no doubt on agreement that effective planning and management is needed to solve the problems generated by the natural disaster.

The question that come up after reviewing the statistic data is 'how the government put this issues in their policy? In this subchapter, I would review the Indonesian government policy since 1969 especially to see disaster management in tourism development. In the context of governmental structure Indonesia content of three major government levels, starting from national level, province level, regency level (Laws and Prideaux 2006, 1-8). In addition the district level and sub district level is also being officially operated under the government structure.

National Tourism Planning and Policy

Five-Yearly Development. Tourism became a President Instruction at 1969 started by the new organization maintained tourism activities in Indonesia called Directorate Jenderal Departement Perhubungan (Directorate General for Ministry of Transportation). Indonesia has five-yearly development plans (REPELITA), which establish the country's regulations, policies and programs for its development. There was target to maintain tourism growth at 10-13% per annum at the 1994/1995 – 1998/1999 plan in line with the previous decade. The emphasis of the plan was placed on the regionalization and the reduction of social inequalities. The position of tourism was a sector to meet the government's goals of economic development throughout the regions.

Upon PELITA I which was started at 1969, the political situation was not stable. Therefore government policy was more focus on the political stabilization and the food security. Tourism was not considered as the important part. In addition, there was not tourism part in the National Guide Line (GBHN, Garis Besar Haluan Negara) although government has policy on tourism through President Instruction Number 30 at 1969. In this era two important organizations was developed, PHRI (Perhimpunan Hotel dan Restoran Indonesia) Indonesia Hotel and Restaurant Organization at 1969, and ASITA (Association of the Indonesian Tour and Travel Agencies) at 1971. The program conducted by the BAPPARNAS was human resources training in Bandung and renovation the heritage sites.

In the PELITA II the tourism policy and program was extended on the tourism product, monitoring and regulating tourism activities. There was also increasing number of study, research and planning about tourism. Nevertheless, government developed more infrastructures to meet the demands. In PELITA III era the number of visitor increased significantly. It was more than 400% of increasing number of visitor supported by 53,965 rooms and seven days average length of stay. The increasing number of tourists was analysed as the positive impact of the promotion program and the existence of the office in abroad such as: Frankfurt, San Francisco, Tokyo, Sidney and Singapore. Moreover, the international airport was opened during this time. Furthermore, the program on training and community advocacy to involve in tourism was begun in this PELITA III. In 1979/1980 to 1980/1981, the government develops the RIPPN (Rencana Induk Pengembangan Pariwisata Nasional), National Tourism Development Master Plan. This master plan identified the tourist destination and the entrance city. The RIPPN exposed the problem related to the policy needed by the tourism as a sector.

In the PELITA IV the free visa policy for 38 countries and the airport project development in Biak, Manado and Ambon are the factors of increasing number of tourists. There were 13 entry points from the air and nine new harbours were reported as factor of visitor mobility and economic development. At that time there were new policies that regulate the product, promotion, investment and human resources. Started in 1981 the number of visitors increases 14%. The dynamic of market, attraction and involvement of private sector in the tourism activities embolden the change of RIPPN (Rencana Induk Pengembangan Pariwisata Nasional) National Tourism Master Plan 1980/1981.

In the PELITA V, government established seven strategies to develop tourism including: Consistency of promotion, Increasing the accessibility, Increasing the quality of tourism product and services, Destination oriented development, Promotion the natural, biodiversity and marine tourism, Increasing the quality of human resources and Campaign of tourism awareness. In Repelita V, the concept of Sapta Pesona Policy was launched, consisting of: (1) promotion intensification, (2) increasing access, (3) increasing the product quality and service, (4) tourist destination development, (5) marine tourism development, (6) the development of quantity and quality of tourist human resources and (7) the increasing of the tourism awareness through Sapta Pesona (safety, orderliness, clean, comfortable, hospitality and great memory).

In 1992 the Indonesia government established DEKUNI (Dekade Kunjungan Indonesia), annually tourism theme program through President Instruction Number 60 year 1992. It was started 1993 to 2000; environment (1993), woman empowerment in youth and sport development (1994), 50-year independent (1995), marine and outer space (1996), communication (1997), art and culture (1998), handicraft and engineering (1999) and the using of technology to increase the quality of life (2000).

During 1994 to 1998 the tourism development gave the sign for the success of the program in term of economic development. There was increasing foreign and domestic tourism in 15 years since RIPPN was finished. In the middle of Repelita VI (1996/7 – 1997/8) government compiled the RIPP with the regional approaches where Indonesia was divided into six regions consist of several provinces. Unfortunately the crisis in 1997/1998 brought Indonesia in the fragile condition. In addition, the political crisis impacted Indonesia in the terrible situation. However, in term of planning process in the end of PELITA VI, the vision and mission of tourism become clear. It was supported by significant result of the tourism field study about the negative impact and positive impact and new perspective of planning in tourism.

After PELITA. After five-yearly development policy, a rather sophisticated development planning system has existed in Indonesia since more than 25 years, under the authority of the National Development Planning Board (Badan Perencanaan Pembangunan Nasional – BAPPENAS), which is particularly in charge of to coordinate the preparation and the implementation of the development planning. There are two development plans corresponding to distinct implementation periods; (1) The Long term Development Plan (LTPD), the duration is 25 years: the LTPD II is being implemented since the 1st of April 1994 and it will last until the 30 March 2018, (2) The Five years Development Plan (FYDP) is under implementation since the 1st of April 1994 and it will last until the 30 March 1999 (Repelita VI).

Decentralization Era. Indonesian political elites instituted a series of ‘reforms’ designed to respond to popular demand and to recover political stability after months of protest and political turmoil in 1998. The package of political laws consisting of a new election system and new autonomy was established, that is Law (UU) No.22 at 1999 about the Regional Development and UU No.25 at 1999 about the balance of Financial between Regional and National Government. New laws on local governance replaced the old regulation that was created in 1974.

The impact of the decentralization is being portrayed on the positive impact and negative impact. The positive perspective observes the decentralization to minimize of the long-time planning and decision making from central to the local government level. Therefore, there is effectiveness to be reached along the decentralization process. In addition, the development plan and implementation will be better in term of time and local participation. The negative perspective observes the decentralization as the scapegoat for competition between regions and increasing local corruptions. At that time the Ministry of Culture and Tourism hold the role to maintain tourism development. Institutionally, the vision of the Ministry of Culture and Tourism of the Republic Indonesia is “Envisage a national identity, unity of nation in multicultural, people's welfare and international cooperation”.

Regional Tourism Planning and Policy

The Ministry of Cultural and Tourism Instruction Number: KM.16/UM.001/MKP/04 regulate about law's information and documentation network for the internal department of cultural and tourism. In addition the Ministry of Cultural and Tourism Instruction declared the instruction about Regional Tourism Planning and Policy through regulation Number KM.64/HK.201/MKP/04. The purpose of the last regulation is for unify the cooperation and collaboration of tourism development between central government, regional government, business people and community. Moreover, the regulation target is to achieve the understanding and knowledge about tourism development and encourage the cooperation and collaboration between government, business sector and regional

communities. The regulation then becomes the guide for developing the regional tourism master plan. In the second chapter of the regulation document the five aspects of tourism planning is explained as: (1) Tourists, (2) Transportation, (3) Tourism product, (4) Service and facilities, (5) Information about the destination.

Micro Level Planning and Policy

The destination planning in Indonesia is focused on the site specific, which mainly based on the investment demand that is market oriented. It almost does not touch the outside the area. The land use is maximized for the benefit to the investment. Hence, the regional planning conducted by government, which more oriented to the assets and resources. It is also focused on macro level problem such as promotion, human resources, institutional, and tourism linkages (RIPPNAS 1997/8, RIPPDA). The destination planning is called RIPOW or Master Plan of the Destination. In the national level Indonesian government has a program of certification, classification, monitoring, permit beside research and promotion.

The ministry of tourism and creative economy established the 16 KSPN (kawasan strategis pariwisata nasional) – national strategic tourism area that are located in 12 provinces. The ministry mentioned that the priority of development is needed in order to deal with the lack of government investment to all provinces in Indonesia. Therefore, the government focuses on 12 provinces only instead of 33 provinces. In the long-plan development document the national tourism development will be expanded under the Government Regulation No. 50 at 2011 about National Tourism Development Master Plan (Ripparnas 2010 – 2025) that include 222 tourist destination. Besides that, the government established the MP3EI (Master Plan Percepatan dan Perluasan Pembangunan Ekonomi Indonesia) – the Master Plan for Acceleration and Expansion of Indonesia's Economic Development 2011 – 2025 which decided the economic corridor in Bali and Nusa Tenggara as the entry point of national tourism. These two programs were success to increase the number of tourists.

Analysing the planning a policy in the Indonesian government shows us that emphasises on economic sector toward tourism development is very obvious. However, the government attention in disaster and crisis management is relatively low. Put the emphasis on the mitigation of natural disaster into the planning and policy is more spontaneous action with more reaction rather than planned in comprehensive ways. Moreover, there are some programs established after the massive crises such as Bali Boom and Tsunami for developing infrastructure and facilities for the people but neglect the program to build better image of Indonesia to the world, which important to attract tourist come back to the destination and recover the economy.

The tourist destination is prone to natural hazard as well as some natural hazard area has high potential for tourist destination. However, if the tourist destination is not well managed so it is more dangerous for the population and tourists. Greater exposure to political, economic, social and technological change in countries often removed from the bases of tourism companies requires tourism managers to effectively deal with crisis and disaster (often located a substantial distance away). Lack of in-depth and critical analysis of tourism disaster, which would produce better understanding into condition and help and formulate proper contingency plans. Furthermore, an assessment of past and potential disastrous situation and possible scenarios will assist in identifying and correcting errors in the future.

CONCLUSION

Based on the statistic data one can draw conclusion that tourism is an industry where both demand and supply can be sensitive to security and safety incidents. This case is happen in Indonesia. In many cases the incident such as natural disaster, security and safety influence the tourists' perception of risk. In recent years the concept of tourists' risk perception has gained attention. The fear and incident play significant role in forming the perception of risk especially for destination, which would shape the tourist behaviour.

The tourist destination is prone to natural hazard as well as some natural hazard area has high potential for tourist destination. An assessment of past and potential disastrous situation and possible scenarios will assist in identifying and correcting errors in the future. The Indonesian policy and law have been reviewed as not provide the clear disaster management in tourism development. Indonesian government respond toward natural disaster in order to recover tourism industry have been recorded as the spontaneous action rather than planned action with long term master planning. The effect of disasters on tourist industry performance and the effectiveness of government strategies to restore market confidence are additional avenues for further research, as are disaster preparedness and organisational learning within the tourism industry.

ACKNOWLEDGMENT

The author would like to extend the appreciation to Utrecht University, Nederland and LPDP (*Lembaga Pengelola Dana Pendidikan*) the Ministry of Finance Republic of Indonesia that makes this study and paper possible.

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