

Between Star and Non-Star Accommodation: Governing Uneven Development in an Emerging Destination

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Abstract

This study problematizes the persistent structural imbalance between star-rated and non-star accommodations in Subang Regency, West Java—a strategically positioned yet emerging tourism destination. Moving beyond traditional market-driven explanations, this research employs a qualitative case-study approach, integrating semi-structured interviews with key institutional actors and rigorous document analysis. The findings reveal that uneven development is not merely a byproduct of spatial characteristics or demand fluctuations, but is actively produced and mediated by complex governance configurations. Specifically, the study identifies how land-tenure complexities involving state-owned enterprises (PTPN), rigid zoning thresholds, and environmental mandates act as institutional filters that dictate investment feasibility and access. In response, local government necessitates adaptive, multi-layered strategies to navigate these structural bottlenecks. By conceptualizing governance as a mediating force rather than a neutral regulatory framework, this study contributes to the literature on emerging destinations by highlighting the necessity of institutional alignment to bridge the development gap and foster sustainable, balanced growth.

Keywords: Accommodation development; Institutional governance; Land-tenure; Emerging destinations; Spatial planning; Indonesia

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INTRODUCTION

Tourism is widely recognized as a strategic sector that contributes to economic growth, employment generation, and regional development across national and local scales (UNWTO, 2023a; WTTC, 2023; Roy & Medhekar, 2026; Indriana, 2022). As a multisectoral industry, tourism is inherently interconnected with a wide range of related sectors, including transportation, culinary services, the creative economy, and accommodation, thereby functioning as a key driver of integrated economic activity (Cooper et al., 2008). Through its multiplier effect, tourism stimulates local economic activity and contributes to regional revenue generation in a more inclusive manner (UNWTO, 2023c). Within this context, the institutional capacity of local tourism governance becomes increasingly critical, as it requires adaptive, coordinated strategies that align local resource potential with evolving market dynamics and development priorities (Ministry of Tourism and Creative Economy, 2023).

Subang Regency, situated strategically within the Bandung–Jakarta corridor, represents a compelling case of an emerging destination exhibiting a structural paradox. Reinforced by major infrastructure such as Patimban Port and the Smartpolitan Industrial Area, Subang is increasingly recognized as a burgeoning economic hub. However, as illustrated in Figure 1, recent tourism dynamics from 2022 to 2024 reveal a striking divergence: while international arrivals surged from 575 to 5,989, domestic tourist visits declined steadily (Badan Pusat Statistik Kabupaten Subang, 2025).

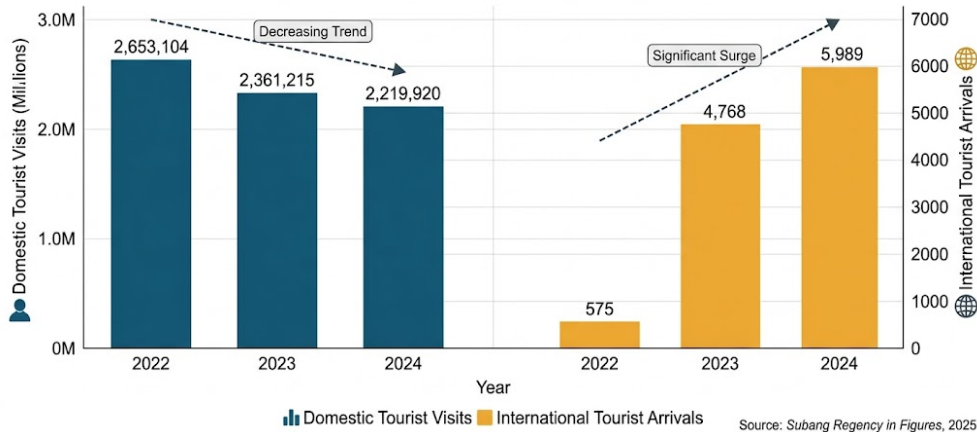


Figure 1. Number of Tourist Visits in Subang Regency, 2022–2024

Source: Badan Pusat Statistik Kabupaten Subang, 2025

This divergence suggests that Subang faces challenges in sustaining domestic demand and maintaining its competitive position. Accommodation services constitute a key component of the tourism system and serve as an important indicator of destination readiness and competitiveness, as part of the supporting infrastructure that enables tourism development (Dwyer & Kim, 2003). In particular, hotels not only provide lodging but also reflect service quality and play a significant role in shaping tourists’ perceptions and trust toward a destination (Pizam & Ellis, 1999; Xiang et al., 2015). As such, well-developed accommodation infrastructure signals destination reliability and strengthens both visitor confidence and investment attractiveness. In this context, high-standard, star-rated hotels play an important role in supporting investment attractiveness and the development of tourism infrastructure, as emphasized in global tourism development frameworks (UNWTO, 2023b).

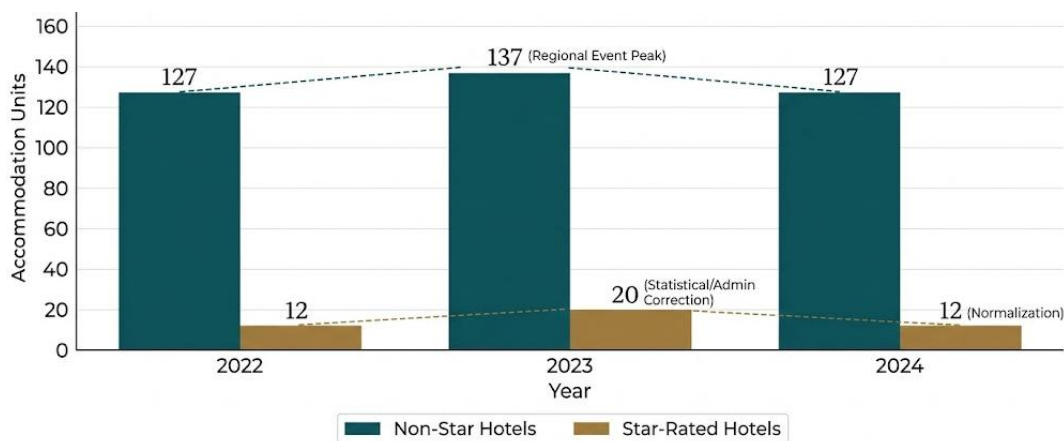


Figure 2. Number of Star-Rated and Non-Star Hotels in Subang Regency, 2022–2024

Source: Badan Pusat Statistik Kabupaten Subang, 2025

Despite this, Subang's accommodation structure exhibits a persistent and uneven development trajectory. As shown in Figure 2, the landscape is overwhelmingly dominated by non-star establishments, which accounted for 127 units in 2024, while star-rated hotels accounted for only 12 units (Badan Pusat Statistik Kabupaten Subang, 2025).

The temporary spike in star-rated hotels observed in 2023 (rising to 20 units) must be interpreted with caution. This fluctuation does not reflect a structural shift in supply or the rapid construction of new facilities; rather, it highlights the administrative volatility and regulatory fluidity inherent in Indonesia's hotel classification systems. Certification renewals and compliance shifts mean establishments may temporarily appear in the star-rated category before reverting to non-star status, marking a statistical reporting anomaly rather than structural growth (Badan Pusat Statistik Kabupaten Subang, 2025).

Previous studies on regional accommodation development have primarily examined hotel growth through the lenses of spatial distribution, location determinants, and agglomeration dynamics (Yang et al., 2012; Yang et al., 2014; Sangkaew et al., 2025; Urtasun & Gutiérrez, 2006). These studies highlight how accessibility, proximity to attractions, and clustering effects shape where accommodation develops, reflecting a predominantly market- and location-driven perspective. In the Indonesian context, existing research has largely emphasized community-based tourism and small-scale accommodation development, particularly in emerging and rural destinations, where non-formal lodging such as homestays plays a significant role. However, these strands of literature remain largely disconnected. Empirical studies that explicitly examine how governance structures—particularly land tenure, zoning regulations, and institutional coordination—interact to shape uneven accommodation development, including the persistent divergence between star-rated and non-star establishments, remain limited. Addressing this gap, this study investigates how institutional and spatial governance mechanisms influence the development trajectory of accommodation services in Subang Regency, with a particular focus on the imbalance between formal and non-formal lodging in an emerging destination context.

Against this backdrop, this study employs a qualitative case-study approach, drawing on in-depth interviews with three core institutions—Subang's Disparpora (Regency Office of Tourism, Youth and Sports), DPMPTSP (Investment and Integrated One-Stop Service Office), and Bappeda (Regional Development Planning Agency)—to explore the dynamics of accommodation growth and identify systemic challenges. By foregrounding institutional governance, this research elucidates how local governments can navigate structural disparities through collaborative and adaptive strategies.

LITERATURE REVIEW

Conceptualizing Emerging Destinations

The concept of emerging destinations generally refers to tourism regions in the early stages of development, where infrastructure, services, and institutional systems have yet to stabilize. Emerging tourism destinations often demonstrate significant growth potential derived from their natural and cultural resource endowments; however, their development trajectories are frequently constrained by structural limitations, including restricted capital investment, limited institutional capacity, and underdeveloped infrastructure (Dwyer & Kim, 2003; Sharpley & Telfer, 2015; Rodríguez-Pose, 2013; UNWTO, 2023b). A common characteristic of such destinations is the prevalence of informal tourism practices. Small-scale, organic enterprises—ranging from community-based homestays to local eateries—often proliferate in the absence of structured planning. The prevalence of informal tourism enterprises in emerging destinations is often associated with structural constraints on development (Sharpley & Telfer, 2015). It may contribute to a mismatch between tourist expectations for standardized service quality and the actual service capacity available at the destination. Addressing this challenge requires gradual,

participatory development approaches, including community-based tourism (CBT), which can help align local service provision with institutional support and foster more inclusive economic outcomes (UNWTO, 2023c). While informality is often observed in emerging destinations, recent studies suggest that such patterns are not merely organic outcomes but are also shaped and reinforced by institutional and governance structures, thereby influencing the trajectory of tourism development.

Spatial Polarization: Core–Periphery Dynamics and the Development Gap

Building on this perspective, the uneven spatial distribution of tourism infrastructure can be more systematically understood through spatial development frameworks, particularly the Core–Periphery model and the Development Gap approach, which highlight disparities between established tourism hubs and lagging regions. These imbalances are structurally produced through unequal infrastructure provision, limited institutional capacity, and fragmented spatial planning, which collectively constrain the ability of peripheral regions to translate tourism potential into formalized and investable accommodation development (Wang & Xing, 2026), particularly in rural contexts, where tourism small and medium-sized enterprises often operate under conditions of resource constraints and limited governance support (Ramukumba, 2025). Core regions, characterized by superior connectivity and comprehensive amenities, tend to attract a disproportionate share of formal hotel investment, whereas peripheral areas experience stagnation due to limited accessibility and lower destination competitiveness (Dredge & Jenkins, 2020). The Core–Periphery Model—pioneered by (Friedmann, 1966) and further developed by (Peet, 1975; Sharpley & Telfer, 2015)—provides the spatial logic for this polarization, describing a hierarchical structure in which core regions concentrate economic power, while peripheral regions remain constrained by restricted access to resources and infrastructure (Rodríguez-Pose, 2013). In tourism contexts, this is reflected in the concentration of star-rated and formal accommodation in core growth poles, while peripheral areas rely on smaller-scale and less formal accommodation models as adaptive responses to structural constraints (Sharpley & Telfer, 2015). Consistent with Growth Pole Theory (Perroux, 1955), regional development tends to radiate from these cores, highlighting the need for targeted policy interventions to achieve more balanced and inclusive spatial development.

Institutional Mediators: Land Tenure and Governance as Structural Filters

Emerging destination literature increasingly recognizes that land tenure arrangements and governance structures are critical determinants of tourism development trajectories. In many developing contexts, strategic tourism land remains under state or corporate control, requiring investment to navigate complex legal frameworks involving state-owned enterprises or long-term sectoral land-use rights (Dredge & Jenkins, 2020). These arrangements often act as "institutional filters" through the following mechanisms: 1) Administrative Complexity: The requirement for specific lease-utilization schemes or land-use conversions creates a layer of regulatory uncertainty that deters capital-intensive investors; and 2) Spatial Exclusion: Where governance coordination is fragmented, land tenure can dictate the scale and distribution of infrastructure, often favoring areas with fewer administrative hurdles over those with high natural potential (Rodríguez-Pose, 2013).

The interaction between spatial planning, land governance, and market dynamics is central to understanding the "structural paradox" of accommodation development. While emerging destination theory highlights the early-stage characteristics of a region, the Core–Periphery model and Institutional Governance theories explain why these imbalances persist. Together, they suggest that uneven development is not merely a market-driven outcome but is institutionally produced and mediated.

In addition, destination competitiveness frameworks provide an analytical lens to understand how these structural conditions translate into tourism performance. Competitiveness is shaped by the integration of resources, supporting infrastructure, demand conditions, and governance effectiveness, which collectively shape a destination's ability to attract investment and sustain visitor flows, particularly in converting tourism demand into formal accommodation development (Dwyer & Kim, 2003). In this regard, such a framework is useful for understanding how development challenges in emerging destinations may arise not only from demand limitations but also from the capacity of institutional and spatial systems to translate tourism potential into investable, standardized accommodation supply.

METHODS

This study adopts a qualitative descriptive research design to deconstruct the structural and institutional dynamics of the hotel sector in Subang Regency, West Java. By focusing on both star-rated and non-star accommodation types, the research investigates the local government's multifaceted role through regulatory, developmental, and supervisory functions. The study examines the dynamics of accommodation services—specifically their numbers, classifications, and spatial distribution—with a focused analysis of the institutional mechanisms that guide the formal sector. Subang Regency was purposively selected as the research site due to its strategic position within the Bandung–Jakarta high-growth corridor and its pronounced imbalance between star-rated and non-star hotels. This disparity serves as a representative case of the structural and governance challenges that characterize emerging tourism destinations. Consequently, the study's scope extends beyond quantitative growth patterns to include qualitative dimensions of public policy, spatial governance, and institutional capacity.

The research utilizes an integration of primary and secondary data to ensure analytical depth: **Primary Data:** Elicited through semi-structured, in-depth interviews with key institutional stakeholders who serve as expert informants. These include representatives from the Tourism, Youth, and Sports Office (*DISPARPORA*), the Investment and Integrated One-Stop Service Office (*DPMPTSP*), and the Regional Development Planning Agency (*BAPPEDA*) of Subang Regency. The interviews focused on government strategies, licensing bottlenecks, and the evolution of local accommodation policies. **Secondary Data:** Obtained through documentation and field observation, including official government archives and statistical reports from the Badan Pusat Statistik (BPS) and Open Data Jabar. This data covers hotel classification trends and visitation dynamics between 2022 and 2024. Additionally, a systematic review was conducted of academic journals (2019–2024), national policy documents (Kemenparekraf), and international guidelines (UNWTO).

The analytical process followed the interactive model of Miles and Huberman (1994), which involves three concurrent flows of activity: data reduction, data display, and conclusion drawing/verification. An inductive approach was employed to identify emerging growth patterns, systemic institutional challenges, and broader policy implications from the raw data. To ensure methodological rigor and validity, the study utilized methodological triangulation. This involved cross-referencing interview findings with statistical documentation and existing literature to ensure analytical consistency and to mitigate bias. This robust framework enables a comprehensive understanding of the institutional mechanisms driving the tourism sector in a complex, emerging destination context.

RESULTS AND DISCUSSION

Accommodation Service Development in Subang Regency by Hotel Classification

The development trajectory of accommodation services in Subang Regency from 2022 to 2024 reveals a stark quantitative imbalance between star-rated and non-star establishments. Official data from the Central Bureau of Statistics indicates a temporary fluctuation in the number of star-rated hotels, rising from 12 units in 2022 to 20 units in 2023, before reverting to 12 units in 2024. This shift should be interpreted as administrative volatility rather than a structural expansion or contraction of the sector. In the Indonesian context, hotel classification is governed by periodic certification and compliance with national standards; thus, establishments may temporarily appear in the star-rated category during active certification windows and revert to non-star status upon non-renewal. Consequently, this fluctuation represents a statistical reporting anomaly rather than a genuine shift in Subang's accommodation supply.

Despite these statistical variations, the overarching pattern remains consistent: non-star accommodation continues to dominate the local structure. This configuration aligns with Subang's positioning as an emerging destination, where growth is primarily driven by nature-based attractions while formal investment lags. From a destination competitiveness perspective, this imbalance reflects a weak integration between demand potential, supporting infrastructure, and institutional effectiveness, as evidenced by zoning restrictions, land tenure complexity, and demand volatility, which collectively limit Subang's ability to convert visitation into stable accommodation investment (Dwyer & Kim, 2003). Specifically, southern zones like Ciater and Jalancagak have experienced rapid, community-driven growth in informal and semi-formal lodging, such as homestays and glamping, leveraging natural assets like hot springs and pine forests. However, the limited expansion of higher-standard, star-rated hotels indicates that this imbalance is shaped not only by market forces but is strongly mediated by institutional and spatial conditions that regulate land access, investment feasibility, and development scale.

From a spatial-planning perspective, the expansion of star-rated hotels is structurally constrained by land allocation policies within the Regional Spatial Plan and the Detailed Spatial Plan. A significant portion of strategically located land is strictly designated for agriculture and food security, reflecting Subang's role as a national rice-producing hub. As a result, parcels with high tourism potential are often legally unavailable for formal accommodation projects, creating administrative limits on where star-rated hotels can be established. Furthermore, several prospective sites are associated with land assets managed by the State-Owned Plantation Enterprise operating under long-term Land-Use Rights (HGU). Utilizing such land for tourism requires complex governance mechanisms, including Operational Cooperation Schemes (KSOs), lease agreements, and land-use conversion approvals spanning multiple institutional levels. These multi-layered approval processes extend negotiation timelines and increase regulatory uncertainty, deterring capital-intensive investors who typically prefer the lower administrative barriers of privately owned land.

Technical land-use provisions further exacerbate these governance constraints. Tourism-supporting zones in Subang commonly impose a 60% maximum buildability threshold, requiring the remaining area to be preserved as green open space. For star-rated hotels, which necessitate substantial built footprints to meet standards for guestrooms, parking, and MICE (Meetings, Incentives, Conferences, and Exhibitions) facilities, this requirement can diminish project feasibility and operational scale. Moreover, construction in ecologically sensitive areas, such as water catchment landscapes, attracts heightened scrutiny from environmental authorities, increasing perceived regulatory risks.

Table 1. Institutional and Market Mediators of Accommodation Unevenness

Dimension	Mediating Factors	Impact on Star-Rated Development
Spatial Planning	Agricultural land protection in Spatial & Detailed Plans	Limits physical locations for formal hotels

Dimension	Mediating Factors	Impact on Star-Rated Development
Land Tenure	State-Owned Enterprise (SOE) Land-Use Rights	Increases administrative complexity and uncertainty
Technical Zoning	60% Buildability Threshold	Reduces operational scale and financial feasibility
Mobility Pattern	Transit-based visitation (Bandung–Jakarta corridor)	Depresses the length of stay and occupancy stability

Source: Research data, 2025

Demand-side dynamics and mobility patterns further reinforce this unevenness. Subang’s location along the Bandung–Jakarta corridor often positions it as a transit area rather than a primary overnight destination. Stakeholder accounts suggest that many trips are short and schedule-compressed, with visitors returning to nearby urban centers rather than extending their stay locally. This mobility pattern contributes to unpredictable occupancy for formal properties, which rely on stable room-night demand to sustain viability. Concurrently, visitors increasingly prefer experience-oriented lodging—such as homestays and glamping—as these options align with the destination’s nature-based core appeal.

In summary, the imbalance between star-rated and non-star supply in Subang is an institutionally produced phenomenon. It is not merely a result of unequal resources but is actively mediated by governance systems that regulate access to land, capital, and licensing. These findings suggest that the "development gap" and the "core–periphery" distinction are continuously shaped by policy decisions that enable development in specific nodes while limiting it in others. Strengthening spatial coordination and synchronizing cross-institutional regulations are, therefore, critical prerequisites for moving toward a more standardized accommodation system.

Local Government Constraints in Expanding the Number and Quality of Star-Rated Hotels

Evidence from semi-structured interviews with the Tourism, Youth, and Sports Office (Disparpora), the Investment and Integrated One-Stop Service Office (DPMPTSP), and the Regional Development Planning, Research, and Innovation Agency (Bappeda), corroborated by field observations, identifies three systemic clusters of constraints hindering star-rated hotel expansion: (1) regulatory and spatial-planning bottlenecks, (2) economic and market-demand volatility, and (3) social and environmental trade-offs. These clusters indicate that the "development gap" is not merely a resource issue but is institutionally produced and mediated.

A primary institutional barrier is the protracted revision of key planning instruments, specifically the Regional Spatial Plan and the Detailed Spatial Plan. This misalignment between potential development sites and current land-use designations—often locked in industrial or agricultural categories—creates acute legal and administrative uncertainty for investors. Furthermore, land tenure complexity involving the state-owned plantation enterprise acts as a significant "structural filter". Prospective sites associated with these assets require multi-layered approval processes for land-use conversion or partnership mechanisms that extend far beyond district-level authority, fostering a perception of an administratively burdensome investment climate. Technical restrictions further narrow feasibility; tourism zones commonly impose a 60% maximum buildable area threshold, which limits the large footprints required for standardized guestrooms, parking, and meeting facilities. These patterns reflect limitations in Multi-Level Governance, where a lack of synchronization between district, provincial, and central policies stagnates strategic sector development (Cairney et al., 2019).

Interview findings with local government agencies and operators indicate that market demand is characterized by high volatility and weak occupancy stability, which serve as major deterrents to capital-intensive investment. Star-hotel occupancy tends to be event-driven, peaking during specific large-scale regional events—such as sports championships or religious festivals—while declining substantially during off-peak periods. This seasonality is consistent

with broader tourism dynamics in emerging destinations (UNWTO, 2023; Badan Pusat Statistik Kabupaten Subang, 2025, 2025). Demand is further depressed by "destination substitution"; Subang's proximity to major urban centers like Bandung and Jakarta enables high-accessibility day trips, causing visitors to return to cities with more mature entertainment and urban amenities rather than staying overnight locally. Additionally, primary visitor segments increasingly favor experience-oriented lodging, such as homestays and glamping, which are more flexible and lower in cost than formal hotel models (Tucker & Boonabaana, 2021).

Socio-environmental trade-offs present a persistent dilemma for the local government. Many promising tourism areas, particularly in southern Subang, are situated within water catchment zones or ecologically protected landscapes, where permanent construction attracts heightened scrutiny from environmental authorities and law enforcement. Furthermore, a lack of essential supporting infrastructure—including access roads, drainage, and high-capacity electricity—imposes high upfront costs on potential investors. This challenge resonates with Institutional Theory, suggesting that where public institutions fail to provide foundational enabling conditions, "institutional voids" emerge that hinder the formal sector (Dredge & Jenkins, 2020). Consequently, environmental protection mandates and infrastructure gaps jointly reinforce a reliance on smaller-scale, non-permanent accommodation models.

Table 2. Summary of Institutional and Structural Constraints in Subang Regency

Constraint Cluster	Specific Institutional & Structural Bottlenecks	Impact on Star-Rated Hotel Development
Regulatory & Spatial	Incomplete <i>Regional Spatial Plan & Detailed Spatial Plan</i> revisions; Land tenure complexity with state-owned plantation assets.	Generates legal uncertainty and creates high entry barriers for capital-intensive investment.
Economic & Demand	Event-driven occupancy peaks; Transit-based mobility; Preference for experience-based lodging (glamping/homestays).	Depresses length of stay; reduces predictability of room-night demand; weakens the investment case.
Social & Environmental	60% buildability limits; Conservation & water catchment protection; Infrastructure gaps (roads/electricity).	Reduces project feasibility; increases upfront infrastructure costs and perceived regulatory risk.

Source: Research data, 2025

Local Government Strategies for Managing and Developing Accommodation Services

Subang Regency's accommodation development is guided by a spatially adaptive planning framework anchored in the Regional Spatial Plan (RTRW 2011–2031) and aligned with national and provincial tourism development frameworks, such as the National Tourism Strategic Area and Provincial Tourism Development Areas. Through this approach, the local government seeks to align sector growth with topographical realities, environmental mandates, and divergent economic trajectories. The core of Subang's strategy lies in delineating three distinct functional zones, each designed to mitigate the spatial mismatch between land suitability and market demand. As shown in Figure 3, this zoning serves as a governance mechanism to manage the spatial tension between tourism expansion and rigid land-use protection policies, such as those aimed at preserving agricultural land.

First, the Southern Zone (500–1,500 mdpl): Prioritizes nature-based experiences through homestays, glamping facilities, and eco-resorts. This pattern reflects a demand-oriented approach targeting visitors' preferences for community-based tourism (CBT) and mountain landscapes. Second, the Central Zone (50–500 mdpl): Serves as the administrative and urban core, focusing on mid-range and business hotels to support government travel and Meetings, Incentives, Conferences, and Exhibitions (MICE) activities. Third, the Northern Zone (0–50 mdpl): Concentrates on business hotels and industrial-transit facilities serving the logistics-related mobility of the Patimban Port and Smartpolitan Industrial Area.



Figure 3. Functional Zoning for Tourism and Accommodation Development in Subang Regency
Source: Author's elaboration based on Subang regency spatial planning documents and field interview findings

This spatially adaptive approach is increasingly recognized as essential for fostering destination resilience amid environmental constraints and evolving market dynamics. However, the strict 60% buildability limit in these zones remains a significant hurdle, particularly for star-rated hotels that require large footprints for guestrooms and amenities. Given the dominance of the non-star sector, the Department of Tourism, Youth, and Sports has advanced Community-Based Tourism (CBT) by developing tourism villages and homestays. Interventions include Cleanliness, Health, Safety, and Environmental Sustainability (CHSE) certification, digital literacy mentoring, and the development of operational Standard Operating Procedures in collaboration with academic partners. While digital adoption improves operational efficiency and sustainability, and inclusive stakeholder participation ensures equitable benefits, this study identifies CBT as an adaptive response to structural bottlenecks rather than a comprehensive solution for the star-rated investment gap. In practice, CBT reinforces existing patterns where peripheral areas remain dominated by informal supply, functioning more as a complementary strategy to broader institutional efforts.

Upgrading the accommodation sector depends heavily on collaborative governance to navigate land-use complexity and investment legality. The Regional Development Planning Agency plays a strategic role in aligning the Detailed Spatial Plan with industrial and tourism directions. At the same time, the Investment and Integrated One-Stop Service Office facilitates licensing via Risk-Based Approach Online Single Submission (OSS-RBA). Coordination extends to State-Owned Plantation Enterprises and forestry authorities to manage land-use conversion and lease-utilization schemes in the south. Effective tourism governance in this context requires active engagement, trust-building, and clear mapping of actors among government, businesses, and communities.

The emergence of northern growth poles—namely Patimban Port and Subang Smartpolitan—is inducing demand for formal business and transit accommodation. This dynamic aligns with Growth Pole Theory, which holds that specific economic hubs generate spillover demand for hospitality services. However, a critical distinction remains between industrial-transit mobility and recreational tourism demand. To manage this, the local government has adopted

an incremental strategy to improve the quality of the non-star segment gradually. By focusing on consistent, small-scale improvements—such as basic operational training and modular SOPs—the non-star segment is repositioned as a structured pathway for future formal standardization and reclassification.

Discussion

The empirical findings from Subang Regency demonstrate that uneven accommodation development is not merely a byproduct of market demand or geographical accessibility, but is actively produced and mediated by governance configurations. While the region possesses significant potential as an emerging destination, the structural dominance of non-star accommodation reflects a persistent "development gap" that is institutionally anchored. This study argues that the observed imbalances result from institutional filters—including complex land tenure, rigid zoning, and administrative volatility—that determine investment feasibility and access.

A critical observation in this study is the statistical fluctuation of star-rated hotels, which rose from 12 units in 2022 to 20 units in 2023 before reverting to 12 in 2024. Rather than representing a structural shift or rapid physical construction, this study identifies this spike as a statistical reporting anomaly. In the Indonesian context, hotel classification is subject to periodic certification by national standards; thus, the 2023 surge likely reflects temporary administrative adjustments or classification renewals within the Central Bureau of Statistics database. This "administrative fluidity" underscores the fragility of the formal sector in emerging destinations, where recorded growth may reflect regulatory status rather than tangible infrastructure expansion.

The persistence of non-star dominance is reinforced by severe spatial and regulatory constraints that disproportionately affect capital-intensive, star-rated investments. Two primary bottlenecks emerge from the data: 1) **Land Tenure Complexity:** Many high-potential tourism sites are managed by state-owned plantation enterprises, under Long-term Land Use Rights. Utilizing these assets requires complex mechanisms such as Operational Cooperation Schemes or land-use conversions involving multiple institutional levels. These processes extend administrative timelines and heighten regulatory uncertainty, deterring large-scale formal investors. 2) **Technical Buildability Limits:** Tourism-supporting zones in Subang commonly impose a 60% maximum buildability threshold, requiring 40% of the site to be preserved as green open space. For star-rated hotels, which require substantial built footprints for MICE (Meetings, Incentives, Conferences, and Exhibitions) facilities and parking, these limits significantly reduce project feasibility and operational scale.

Demand-side dynamics further explain the slow growth of formal hotels. Subang serves as a strategic transit area along the Bandung–Jakarta corridor, resulting in a short-visit market structure characterized by day trips rather than extended overnight stays. This mobility pattern depresses the length of stay and creates demand volatility, making occupancy stability difficult for formal properties that depend on consistent room-night demand. Furthermore, tourists increasingly favor experience-oriented lodging—such as glamping and homestays—which aligns more closely with the region's nature-based core appeal. Consequently, the growth of formal supply lags behind flexible, low-overhead alternative models that are more embedded within local communities.

Theoretical and Managerial Contribution

The findings of this study offer significant theoretical and managerial insights that are pivotal for the development of emerging tourism destinations. First, from a theoretical perspective, this research advances existing literature by demonstrating that uneven tourism development is not merely a market-driven outcome but is fundamentally produced and mediated by complex

governance configurations. Second, it provides a more nuanced interpretation of the Development Gap and Core–Periphery frameworks by identifying how institutional filters, such as intricate land tenure arrangements and rigid buildability thresholds, dictate the spatial distribution of investment opportunities and access to capital. Third, the study re-conceptualizes the role of Community-Based Tourism (CBT) in emerging contexts, positioning it as an adaptive response to structural bottlenecks rather than a comprehensive substitute for formal, high-standard accommodation development.

In terms of managerial contributions, first, the results highlight the critical necessity for institutional alignment, specifically the synchronization of local spatial planning instruments with feasible investment pathways to mitigate administrative uncertainty and address institutional voids. Second, local authorities should prioritize establishing transparent, collaborative mechanisms with state-owned enterprises to unlock strategic land assets currently constrained by long-term tenure arrangements. Third, policymakers must ensure that accommodation development strategies align with market realities by clearly differentiating between industrial-transit demand in growth corridors and experience-oriented leisure segments in nature-based zones. Finally, the study suggests that the non-star sector should be managed through incremental quality-upgrading programs that serve as a standardized foundation for future formal classification and reclassification.

CONCLUSION

Subang Regency's accommodation sector demonstrates a persistent pattern of uneven development that cannot be explained solely by disparities in market demand or spatial characteristics. While the expansion of star-rated hotels remains limited and spatially concentrated, and non-star accommodation continues to dominate the landscape, these patterns are fundamentally shaped by governance structures that regulate land access, zoning, and investment processes. In this context, uneven development emerges as a byproduct of institutional arrangements that act as filters, directing development opportunities across different zones and actors. Although local government responses—ranging from functional spatial zoning to community-based initiatives—reflect adaptive strategies to these constraints, their ultimate effectiveness remains contingent upon broader regulatory coherence, infrastructure readiness, and market alignment. Consequently, achieving a more balanced and competitive accommodation structure requires not only market-based adjustments but also systemic institutional reforms that address the deep-seated structural barriers to investment and formal development.

Limitations and Future Research

This study is subject to several limitations that provide fertile ground for future inquiry. First, the analysis primarily reflects the perspectives of local government institutions as the central actors in accommodation governance, meaning the viewpoints of hotel operators, private investors, residents, and tourists were not directly examined. Second, the empirical basis relies on a qualitative case-study design supported by official planning documents and statistics from 2022 to 2024, which may limit the generalizability of the findings to destinations with differing institutional or market conditions. Future research should therefore adopt multi-actor and mixed-method approaches—integrating business performance data, longitudinal tourist behavior, and community perspectives—while expanding comparative analyses across other emerging destinations to examine the transferability of the governance mechanisms identified in this study.

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