



Wonderful Tourism for Wonderful People Quality of Life

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Ministry of Tourism, Republic Indonesia

Jakarta, 14 Oktober 2019



ARAH STRATEGIS PEMBANGUNAN PARIWISATA NASIONAL



Kondisi saat ini (2017)

- Kontribusi PDB Nasional (5%)
- Devisa (Rp. 202,13 Trilyun)
- TTCI (Ranking 42)
- Jumlah Wisman (14,04 Juta)
- Perjalanan Wisnus (270,82 Juta)

Corporate level strategy/ National strategy

- Sustainable Competitive Growth
- Integrated e-Tourism Ecosystem
- Government Support – Industry led

KONDISI 2019

INDONESIA MENJADI NEGARA TUJUAN PARIWISATA KELAS DUNIA (WORLD CLASS TOURISM DESTINATION)

- Kontribusi PDB Nasional (5,5%)
- Devisa (Rp. 280 Trilyun)
- TTCI (Ranking 30)
- Jumlah Wisman (20 Juta)
- Pergerakan Wisnus (275 Juta)

SBU level strategy / Ministry Strategy

<p><u>Destinasi</u> Pengembangan destinasi pariwisata berdaya saing dan berkelanjutan di destinasi pariwisata prioritas</p>	<p><u>Pemasaran</u> Penguatan pemasaran pariwisata nasional yang berorientasi pada pelanggan</p>	<p><u>Industri</u> Meningkatkan jumlah dan daya saing industry pariwisata</p>	<p><u>Kelembagaan</u> Meningkatkan kualitas SDM dan kelembagaan pariwisata nasional</p>
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Functional strategy

<p><u>Destinasi</u></p> <ul style="list-style-type: none"> • S1. Pengembangan ekosistem pariwisata • S2. Pengembangan investasi pariwisata • S3. Penerapan destinasi pariwisata berkelanjutan • S4. Pengembangan amenities • S5. Pengembangan aksesibilitas dan konektivitas • S6. Pengembangan atraksi 	<p><u>Pemasaran</u></p> <ul style="list-style-type: none"> • S7. Pemasaran destinasi branding dan destinasi pariwisata nasional prioritas (Destination) berbasis Teknologi Informasi dan Komunikasi (digital tourism) • S8. Segmentasi pasar yang fokus pada negara asal (untuk Wisman) dan provinsi asal (untuk Wisnus) Wisatawan (Origin) • S9. Meningkatkan penjualan pariwisata yang bersifat musiman dalam meningkatkan jumlah Wisman dan pergerakan Wisnus (Time) 	<p><u>Industri</u></p> <ul style="list-style-type: none"> • S10. Membangun kerjasama Pengembangan industry pariwisata • S11. Deregulasi Peraturan perundangundangan terkait pariwisata • S12. Diversifikasi produk pariwisata • S13. Pengelolaan data, informasi dan Teknologi Informasi dan Komunikasi Pariwisata 	<p><u>Kelembagaan</u></p> <ul style="list-style-type: none"> • S14. Pemberdayaan Masyarakat • S15. Pengelolaan SDM Pariwisata berbasis kompetensi • S16. Pengelolaan kebijakan pariwisata berbasis penelitian dan pengembangan (Research based tourism). • S17. Peningkatan kapasitas dan kapabilitas perguruan tinggi pariwisata • S18. Meningkatkan tata kelola pariwisata nasional
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OUTLINE

1. Indonesia Tourism Performance
2. Ministry of Tourism Organization Structure
3. Tourism Marketing Development
4. Tourism Destination Development
5. Industry & Institution Development
6. Strategi Pengembangan Investasi Pariwisata
7. Digital Tourism
8. Pengembangan Usaha Rintisan (start-up) Pariwisata
9. Millennials Tourism
10. Generasi Pesona Indonesia / Generasi Wonderful Indonesia
11. 3 Ultimate Weapons 2019

Indonesia Tourism Performance



ACKNOWLEDGEMENT OF WONDERFUL INDONESIA BRANDING



Selama 2016, *Wonderful Indonesia* menerima **46 penghargaan** pada berbagai event di **22 negara**.



Minggu, 13/03/2016 10:59 WIB
Bangga! Wonderful Indonesia Juara di Pameran Wisata Terbesar Sedunia



Selama 2017, *Wonderful Indonesia* menerima **27 penghargaan** pada berbagai event di **13 negara**.



Selama 2018, *Wonderful Indonesia* menerima **66 penghargaan** pada berbagai event di **15 negara**

Menpar Terima Penghargaan dari Lonely Planet di WTM London



Hingga akhir Agustus 2019, *Wonderful Indonesia* menerima **41 penghargaan** pada berbagai event di **15 negara**



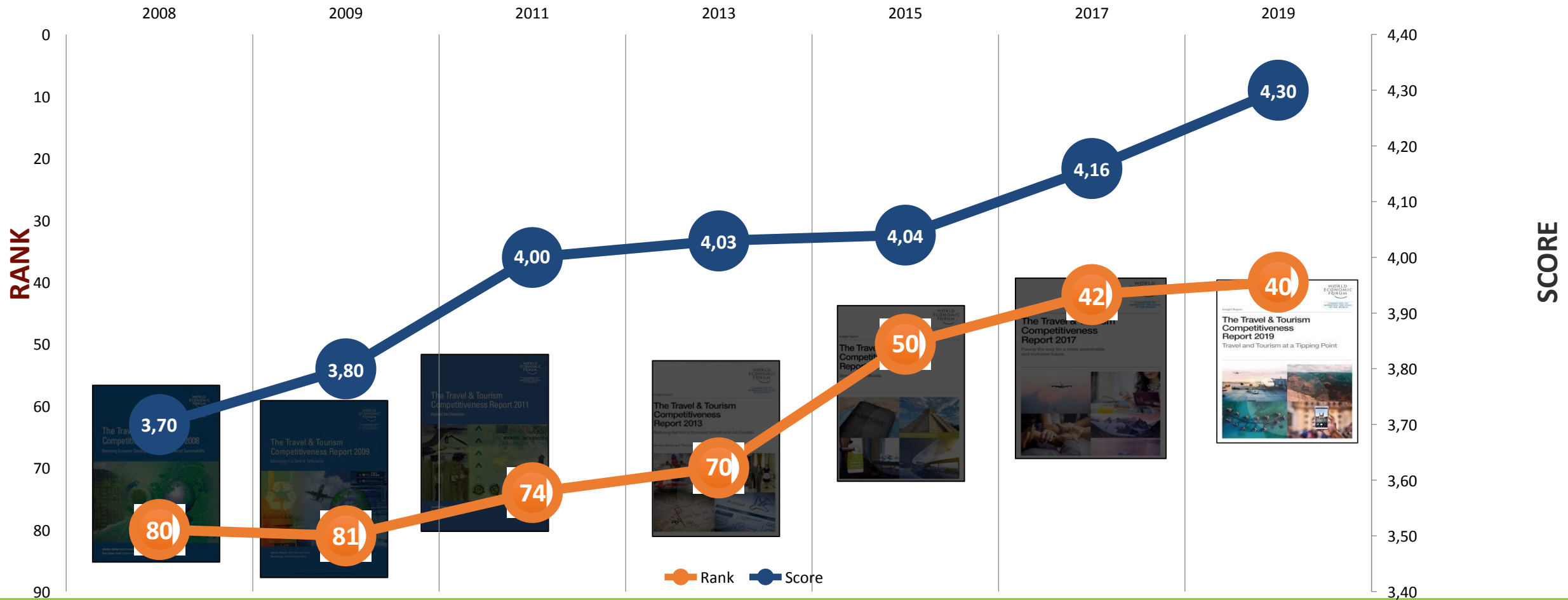
PERINGKAT INDONESIA

di Travel and Tourism Competitiveness Index (TTCI) oleh World Economic Forum (WEF)



MELESAT!!!

Dari ranking **70** pada tahun 2013, menjadi ranking **40** pada tahun 2019



TTCI 2019 vs Rank TTCI 2017



Skor nominal Indonesia naik signifikan dari 4,16 menjadi 4,30 pada tahun 2019, seandainya skor 4,30 diletakkan pada index tahun 2017, maka Indonesia diperkirakan setara dengan ranking 36.

Namun, kenyataannya tahun 2019 Indonesia berada pada posisi ranking 40, artinya negara lain juga meningkat.

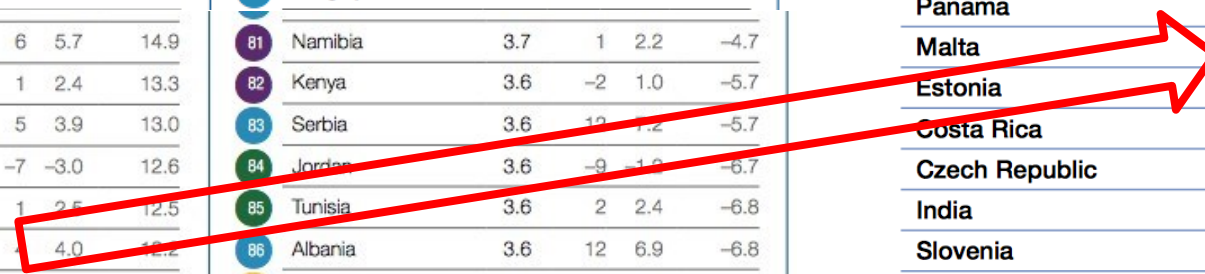
T&T Competitiveness Index 2019 (

Covering 140 economies, the Travel & Tourism Competitiveness Index policies that enable the sustainable development of the travel and tourism industry and the development and competitiveness of a country.

Rank	Economy	Score ¹	Change since 2017		Diff. from Global Avg. (%)
			Rank	Score ²	
1	Spain	5.4	0	0.3	41.4
34	India	4.4	6	5.7	14.9
35	Malta	4.4	1	2.4	13.3
36	Slovenia	4.3	5	3.9	13.0
37	Taiwan, China	4.3	-7	-3.0	12.6
38	Czech Republic	4.3	1	2.5	12.5
39	Russian Federation	4.3	1	4.0	12.2
40	Indonesia	4.3	2	2.8	11.0
41	Costa Rica	4.3	-3	1.0	10.9
42	Poland	4.2	4	2.9	10.0
43	Turkey	4.2	1	2.0	9.8
48	Hungary	4.2	1	3.4	9.0
81	Namibia	3.7	1	2.2	-4.7
82	Kenya	3.6	-2	1.0	-5.7
83	Serbia	3.6	12	7.2	-5.7
84	Jordan	3.6	-9	-1.9	-6.7
85	Tunisia	3.6	2	2.4	-6.8
86	Albania	3.6	12	6.9	-6.8
87	Trinidad and Tobago	3.6	-14	-2.4	-6.9
88	Cape Verde	3.6	-5	0.0	-7.7
89	Iran, Islamic Rep.	3.5	4	3.4	-7.9
90	Bolivia	3.5	9	4.7	-9.1

Table 1: The Travel & Tourism Competitiveness Index 2017

Country/Economy	Rank	Score	Change since 2015
Canada	9	4.97	1
Switzerland	10	4.94	-4
Croatia	32	4.42	1
Finland	33	4.40	-11
Thailand	34	4.38	1
Panama	35	4.37	-1
Malta	36	4.25	4
Estonia	37	4.23	1
Costa Rica	38	4.22	4
Czech Republic	39	4.22	-2
India	40	4.18	12
Slovenia	41	4.18	-2
Indonesia	42	4.16	8
Russian Federation	43	4.15	2
Turkey	44	4.14	0
Bulgaria	45	4.14	4



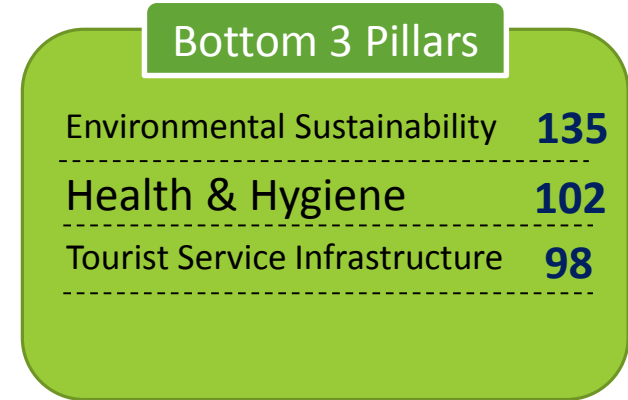
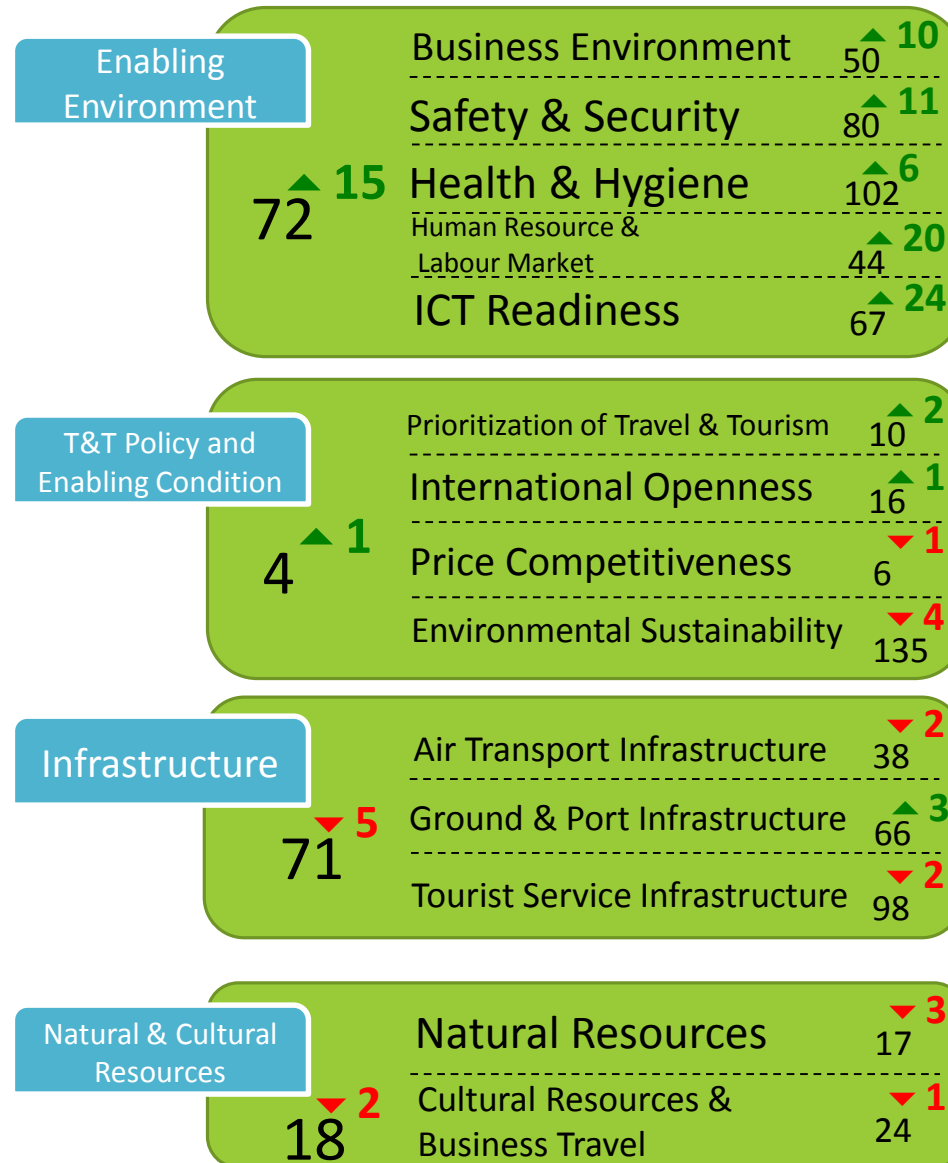
4 – Sub Index

14 Pillars

Rank of 140

40²

INDONESIA TRAVEL & TOURISM COMPETITIVENESS



INDEKS DAYA SAING PARIWISATA INDONESIA TAHUN 2017 & 2019



Sub-Index / Pillar	2017		2019		
	Rank/136	Score	Rank/140	Score	
ENABLING ENVIRONMENT	87	4,54	72	4,8	
Business Environment	60	4,5	50	4,7	↑
Safety and Security	91	5,1	80	5,4	↑
Health and Hygiene	108	4,3	102	4,5	↑
Human Resources and Labour Market	64	4,6	44	4,9	↑
ICT Readiness	91	3,8	67	4,7	↑
TRAVEL AND TOURISM POLICY AND ENABLING CONDITION	5	4,80	4	5,0	
Prioritization of Travel and Tourism	12	5,6	10	4,7	↑
International Openness	17	4,3	16	4,3	↑
Price Competitiveness	5	6,0	6	6,2	↓
Environmental Sustainability	131	3,2	135	3,5	↓
INFRASTRUCTURE	66	3,40	71	3,5	
Air Transport Infrsatructure	36	3,8	38	3,9	↓
Ground and Port Infrastructure	69	3,2	66	3,3	↑
Tourist Service Infrastructure	96	3,1	98	3,1	↓
NATURAL AND CULTURAL RESOURCES	16	4,00	18	3,8	
Natural Resources	14	4,7	17	4,5	↓
Cultural Resources and Business Travel	23	3,3	24	3,2	↓

Keterangan:

- : Tertinggi
- : Terendah
- ↑ : Skor meningkat
- ↓ : Skor menurun

Total
8 Pillar naik
6 Pillar turun

INDEKS DAYA SAING PARIWISATA TAHUN 2019



Di wilayah **Asia Pasifik**, Indonesia menempati **peringkat ke-12** dari 22 negara.

Sementara untuk wilayah **ASEAN**, Indonesia menempati **peringkat ke-4** setelah Singapore, Malaysia, dan Thailand.

ASIA Pacific TCI 2019 Ranking				
Global Rank	Country	Score	Difference from 2017	
			Rank	Score Growth (%)
4	Japan	5.4	0.0	2.1
7	Australia	5.1	0.0	0.8
13	China	4.9	2.0	3.2
14	Hong Kong SAR	4.8	-3.0	-1.1
16	Korea, Rep.	4.8	3.0	4.7
17	Singapore	4.8	-4.0	-2.0
18	New Zealand	4.7	-2.0	1.4
29	Malaysia	4.5	-3.0	0.4
31	Thailand	4.5	3.0	2.6
34	India	4.4	6.0	5.7
37	Taiwan, China	4.3	-7.0	-3.0
40	Indonesia	4.3	2.0	2.8
63	Viet Nam	3.9	4.0	3.4
72	Brunei Darussalam	3.8	n/a	n/a
75	Philippines	3.8	5.0	4.2
77	Sri Lanka	3.7	-13.0	-2.3
93	Mongolia	3.5	9.0	4.8
97	Lao PDR	3.4	-3.0	0.4
98	Cambodia	3.4	3.0	2.4
102	Nepal	3.3	2.0	2.3
120	Bangladesh	3.1	5.0	7.3
121	Pakistan	3.1	3.0	7.1

ASEAN TCI 2019 Ranking				
Global Rank	Country	Score	Difference from 2017	
			Rank	Score Growth (%)
17	Singapore	4.8	-4.0	-2.0
29	Malaysia	4.5	-3.0	0.4
31	Thailand	4.5	3.0	2.6
40	Indonesia	4.3	2.0	2.8
63	Viet Nam	3.9	4.0	3.4
72	Brunei Darussalam	3.8	n/a	n/a
75	Philippines	3.8	5.0	4.2
97	Lao PDR	3.4	-3.0	0.4
98	Cambodia	3.4	3.0	2.4

Index Daya Saing Indonesia dari tahun 2013 hingga tahun 2019 terus mengalami kenaikan signifikan.

No.	Tahun	Ranking Indonesia	Ranking Malaysia
1	2013	70	34
2	2015	50	25
3	2017	42	26
4	2019	40	29

STRATEGI PENINGKATAN RANK BOTTOM 3

NO	PILLAR	RANKING EKSISTING	TARGET RANKING	STRATEGI*
1	Environmental Sustainability	135 (2019)	120 (2021)	<p>A. Sustainable Tourism of Travel Tourism Industry Regulasi sektor Pariwisata yang menjamin keberkelanjutan industri Pariwisata</p> <p>B. Stringency of Environmental Regulation Regulasi lingkungan yang lebih ketat</p> <p>C. Coastal Shelf Fishing Pressure Regulasi yang menjamin keberlangsungan biota laut di wilayah pantai</p>
2	Health and Hygiene	111 (2019)	90 (2021)	<p>A. HIV Prevalence/ % adult population Mengakselerasi usaha-usaha pencegahan HIV</p> <p>B. Malaria cases/100.000 population Mengakselerasi usaha pencegahan Malaria</p> <p>C. Hospital Beds/10,000 population Deregulasi untuk memacu pembangunan Rumah Sakit</p>
3	Tourist Service Infrastructure	98 (2019)	80 (2021)	<p>A. Hotel Rooms Deregulasi investasi hotel, termasuk peningkatan jumlah homestay di daerah tujuan wisata.</p> <p>B. Presence of major car rental companies Deregulasi investasi di usaha transportasi, termasuk kemudahan bagi sistem ride-sharing guna meningkatkan aksesibilitas ke Destinasi Wisata.</p> <p>C. Automated teller machines, per 100,000 adults Percepatan coverage ATM dan alat pembayaran non-tunai.</p>

* Strategi : Indikator yang terkait langsung dengan Industri Pariwisata dan Indikator yang sudah terbukti naik rankingnya.

Ministry of Tourism Organization Structure



LEGAL BASIS OF MINISTRY OF TOURISM

1. Law Number 10 of 2009 concerning Tourism
2. Presidential Regulation Number 7 of 2015 concerning the Organization of State Ministries Presidential
3. Regulation Number 19 of 2015 concerning the Ministry of Tourism as amended by Presidential Regulation Number 93 of 2017 concerning Amendment to Presidential Regulation Number 19 of 2015 concerning the Ministry of Tourism
4. Minister of Tourism Regulation Number 11 of 2017 concerning the Organization and Work Procedure of the Ministry of Tourism

MINISTRY OF TOURISM'S STRUCTURE ORGANIZATION



Minister of Tourism

- Senior Advisor for economy and tourism destination to the ministry of tourism
- Senior advisor for multicultural
- Senior advisor for marine tourism
- Senior advisor for technology and informatics

INSPECTORATE

MINISTRY SECRETARIAT

- Bureau of General, Civil Service, Law and Organization
- Bureau of Finance
- Bureau of Public Communication

DEPUTY OF

DEPUTY OF TOURISM DESTINATION DEVELOPMENT

DEPUTY OF NATIONAL TOURISM MARKETING DEVELOPMENT

DEPUTY OF INTERNATIONAL TOURISM MARKETING

- Deputy Secretariat
- Deputy Assistant of Strategic Management
- Deputy Assistant of Tourism Regulation and Industry
- Deputy Assistant of Cultural Tourism
- Deputy Assistant of Natural and Man-made Tourism
- Deputy Assistant of Tourism Human Resources

- Deputy Secretariat
- Deputy Assistant of Ecosystem and Infrastructure Development
- Deputy Assistant of Tourism Investment
- Deputy Assistant of Destination Development Regional I
- Deputy Assistant of Destination Development Regional II
- Deputy Assistant of Destination Development Regional III

- Deputy Secretariat
- Deputy Assistant of Marketing Strategy Communication
- Deputy Assistant of Marketing Development I Regional I
- Deputy Assistant of Marketing Development I Regional I
- Deputy Assistant of Marketing Development I Regional III
- Deputy Assistant of Marketing Development I Regional IV

- Deputy secretariat
- Deputy Assistant of Marketing Strategy Communication
- Deputy Assistant of Marketing Development II Regional I
- Deputy Assistant of Marketing Development II Regional I
- Deputy Assistant of Marketing Development II Regional III
- Deputy Assistant of Marketing Development II Regional IV

MINISTRY OF TOURISM

Vision

Ministry of Tourism development is using the foothold of President RI's vision Period 2014 – 2019: "The realization of a sovereign Indonesia, Independent and Personality based on Cooperation"

Mission

- Develop competitive tourism destinations, environmentally and culturally, in order to increase national, regional income and create an independent community;
- Develop products and services of the international tourism industry, enhance business partnerships, and be responsible for the natural and socio-cultural environment;
Develop tourism marketing in a synergistic, superior, and responsible way to increase the travel of domestic tourists and foreign tourist visit so as to be competitive in the international market; and
- Develop the organization of the Government, Regional Government, private sector and society, human resources, regulation and operational mechanisms as effectively and efficiently as well as enhancement of international cooperation in order to improve the productivity of tourism development and promote the development of sustainable tourism.



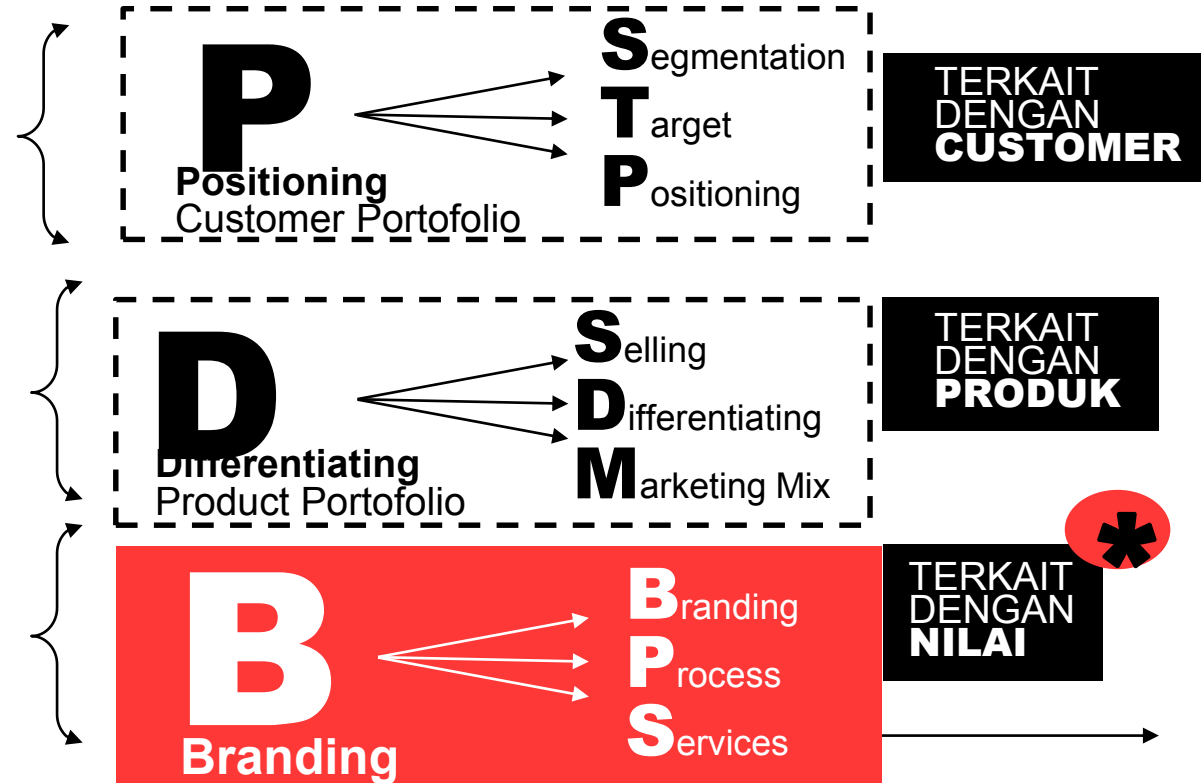
Tourism Marketing Development



TOURISM MARKETING DEVELOPMENT STRATEGY



3 important things in marketing



Branding is **Key Element** in Marketing Process

1. Promise
2. Reputation
3. Long term investment

TOURISM MARKETING DEVELOPMENT STRATEGY



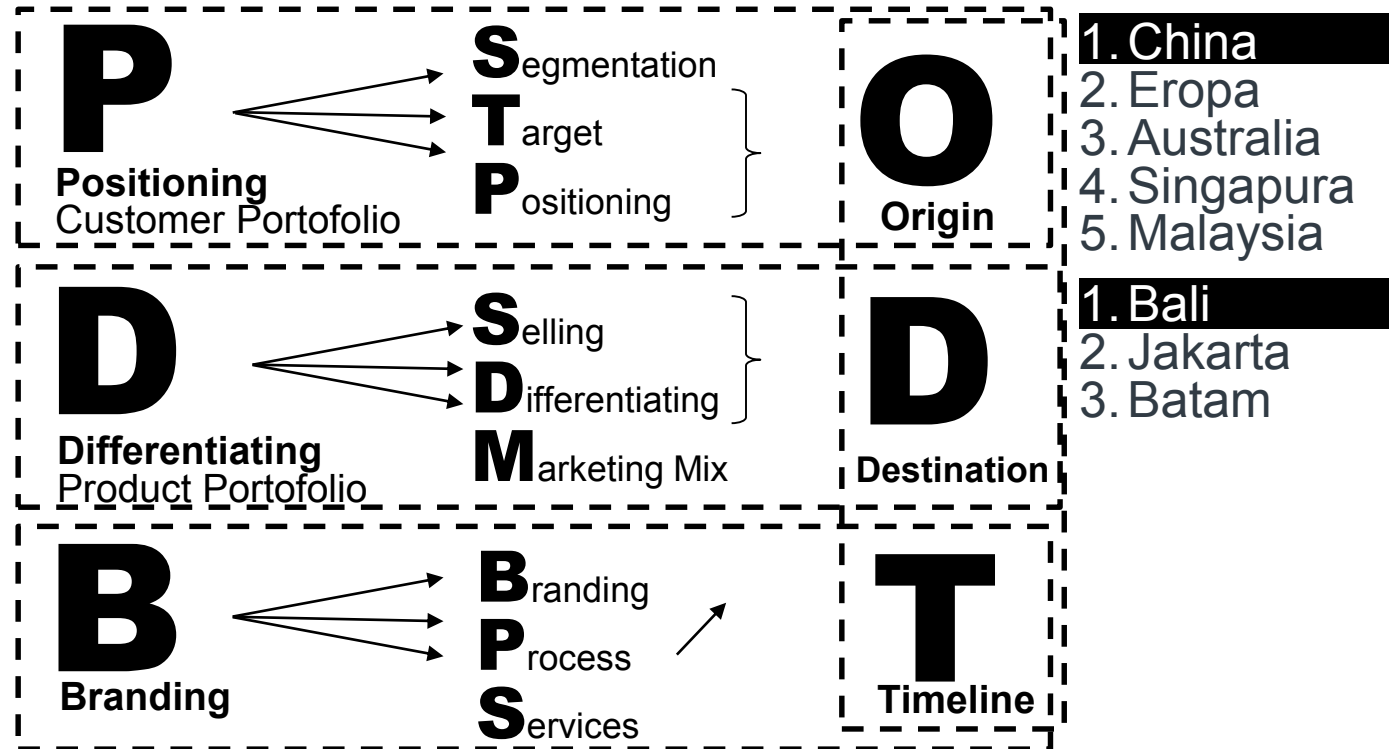
MARKETING STRATEGY

#1



“Positioning determined Differentiating”

Arief Yahya.

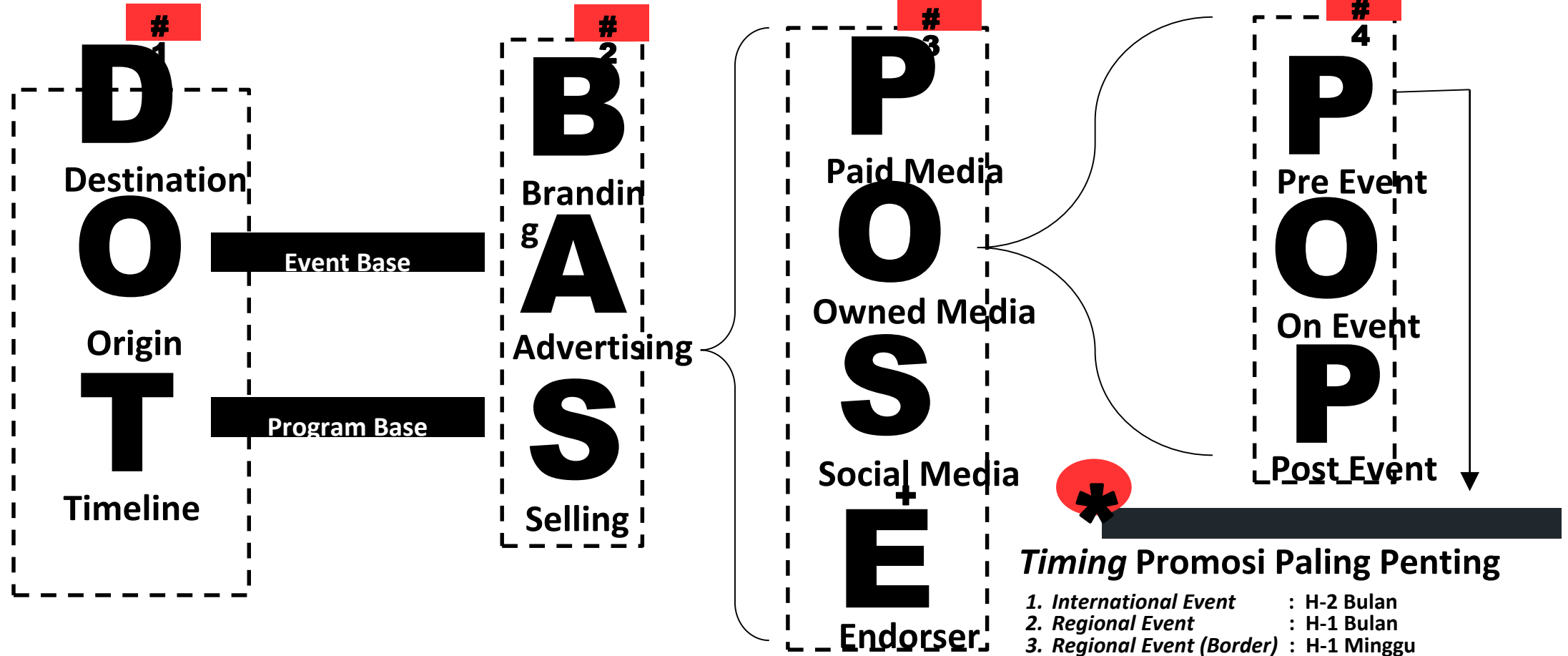


MARKETING STRATEGY

PROMOTION STRATEGY

MEDIA STRATEGY

PROMOTION TIME



MENURUT PENDEKATAN 'DOT'

D ESTINATION (DESTINASI)	Great Bali, Great Jakarta, Great Batam
O RIGIN (ASAL)	Tiongkok, Eropa, Singapore, Malaysia, dan Australia
T IME (WAKTU)	Market Seasonality (Pola Musiman Pasar)

PROMOTION STRATEGY IMPLEMENTATION

National Branding, Regional Branding, Local Branding



Inbound Tourist



Local Tourist



By Customer, By Product, By Event



Commercial TV Promotion in China Market



Advertisement in South Korea (Samsung)



Travel Mart, Direct Sales, Big Festivals



THE WORLD'S
LEADING TRAVEL
TRADE SHOW®
7-11 MARCH 2018



Media Strategy Implementation



PAID MEDIA



OWNED MEDIA

www.Indonesia.travel

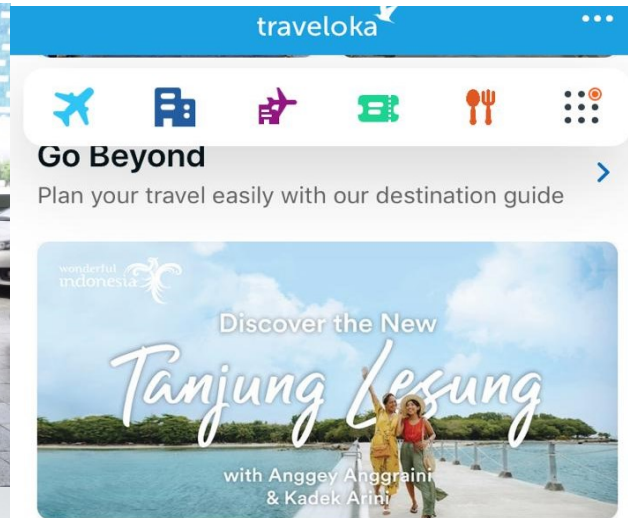
SOCIAL MEDIA

Instagram, Facebook, Twitter, Blog, dsb.

ENDORSER

Brand Ambassador: Philip Kotler, Ted Siong, Christy Chung; Testimoni artis di Media Sosial, Tokoh Berpengaruh

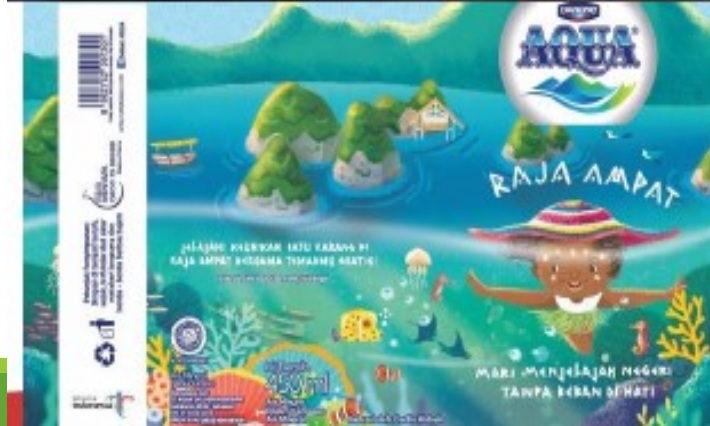
WONDERFUL INDONESIA CO-BRANDING FORUM



Wonderful Indonesia Co-Branding Forum



No. of Brands with MoU: 131
 No. of Brands with Agreement: 51



Tourism Destination Development



ATTRACTION

NATURE



CULTURE



MAN-MADE



TRANSPORTATION AND INFORMATION INFRASTRUCTURE

ACCESSIBILITY

Air



Sea



Land



PUBLIC UTILITIES, PUBLIC FACILITIES, TOURISM FACILITIES : INVESTMENT

(Public Utilities: Electricity, Water, Waste management)

(Banking, Hospitals, Toilet & Parking)

(Accommodations, Restaurants, TIC & Souvenirs)



58 Digital Destinations in all over Indonesia



ATTRACTION

INDONESIA TOURISM PORTFOLIO PRODUCT



INDONESIA TOURISM PORTFOLIO PRODUCT

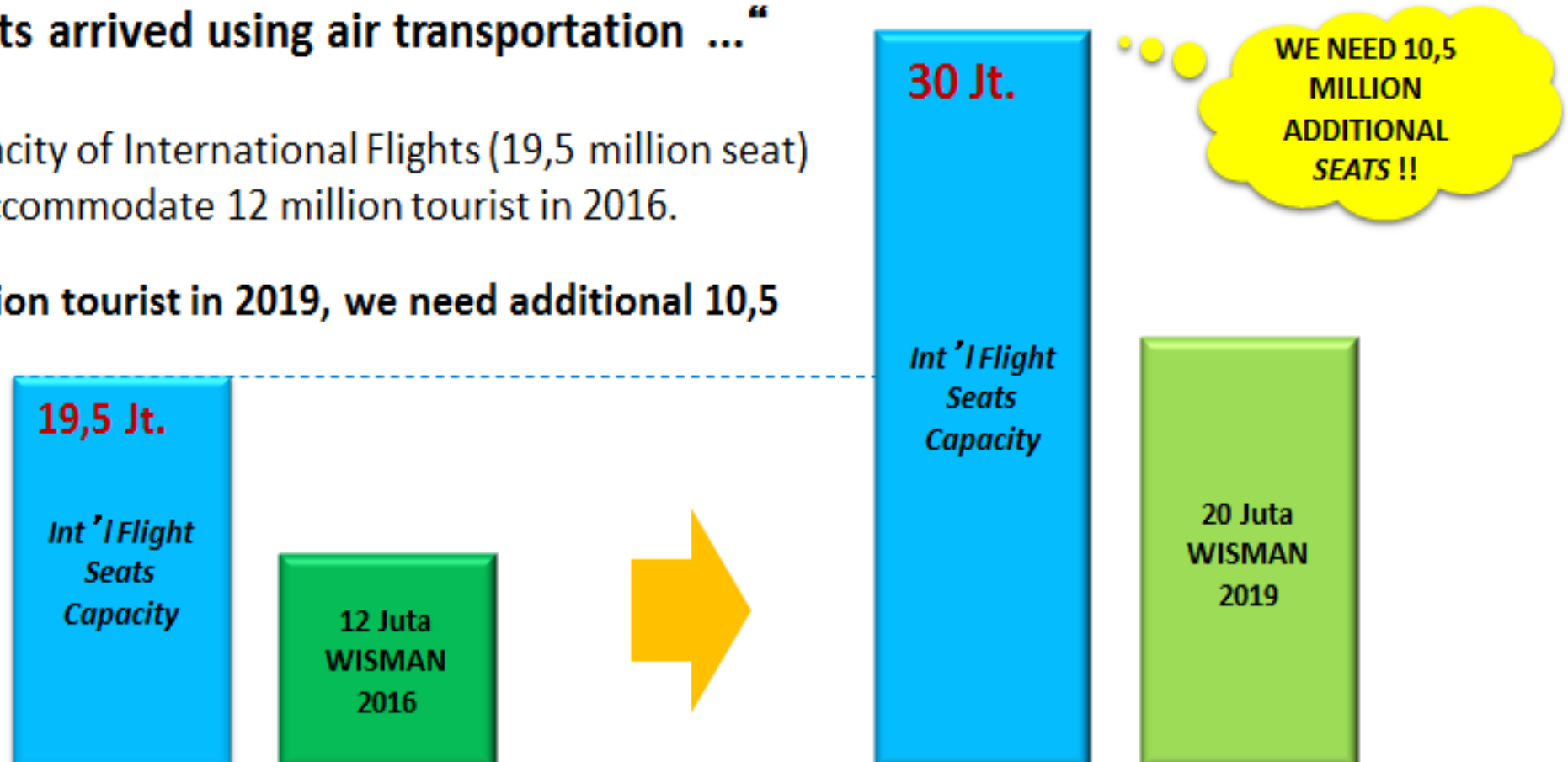
INDONESIA TOURISM PORTFOLIO PRODUCT	Nature (35 %)	1. MARINE TOURISM (35%)
		2. ECO TOURISM (45%)
		3. ADVENTURE TOURISM (20%)
	Culture (60 %)	1. HERITAGE AND PILGRIM TOURISM (20%)
		2. CULINARY AND SHOPPING TOURISM (45%)
		3. CITY AND VILLAGE TOURISM (35%)
	Man Made (5 %)	1. MICE & EVENTS TOURISM (25%)
		2. SPORT TOURISM (60%)
		3. INTEGRATED AREA TOURISM (15%)

ACCESSIBILITY

Air Connectivity



- “Air Connectivity is a Critical Success Factor for boosting inbound tourists arrival initiatives, since 75% of foreign tourists arrived using air transportation ...”
- Current Seats Capacity of International Flights (19,5 million seat) only effective to accommodate 12 million tourist in 2016.
- To Achieve 20 million tourist in 2019, we need additional 10,5 million seats.



AMENITY

Nomadic Tourism



TEMPORARY SOLUTIONS = PERMANENT SOLUTIONS

NOMADIC ACCESS



SEAPLANE

NOMADIC AMENITIES



GLAMPING

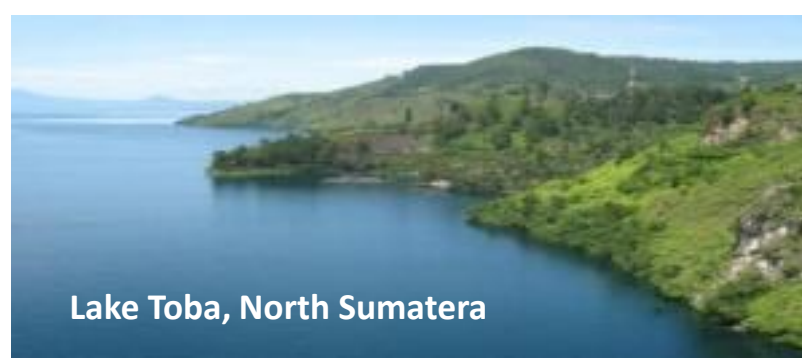
NOMADIC ATTRACTION



LIVEABOARD

CREATING “10 NEW BALI”

Currently we are developing Top 10 priority destinations called 10 New Bali.



Lake Toba, North Sumatera



Tanjung Kelayang, Belitung



Tanjung Lesung, Banten



Kepulauan Seribu, Jakarta



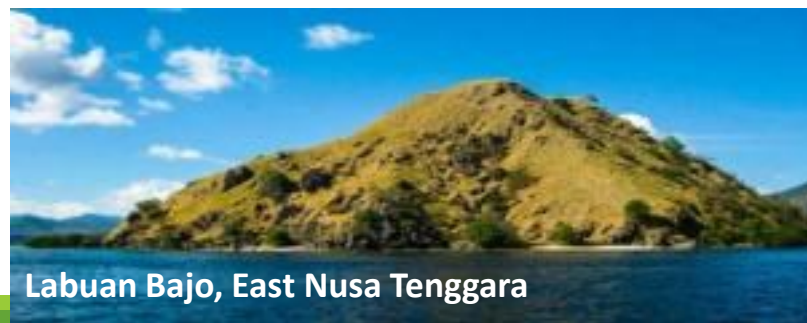
Borobudur, Central Java



Bromo Tengger Semeru, East Java



Mandalika, West Nusa Tenggara



Labuan Bajo, East Nusa Tenggara

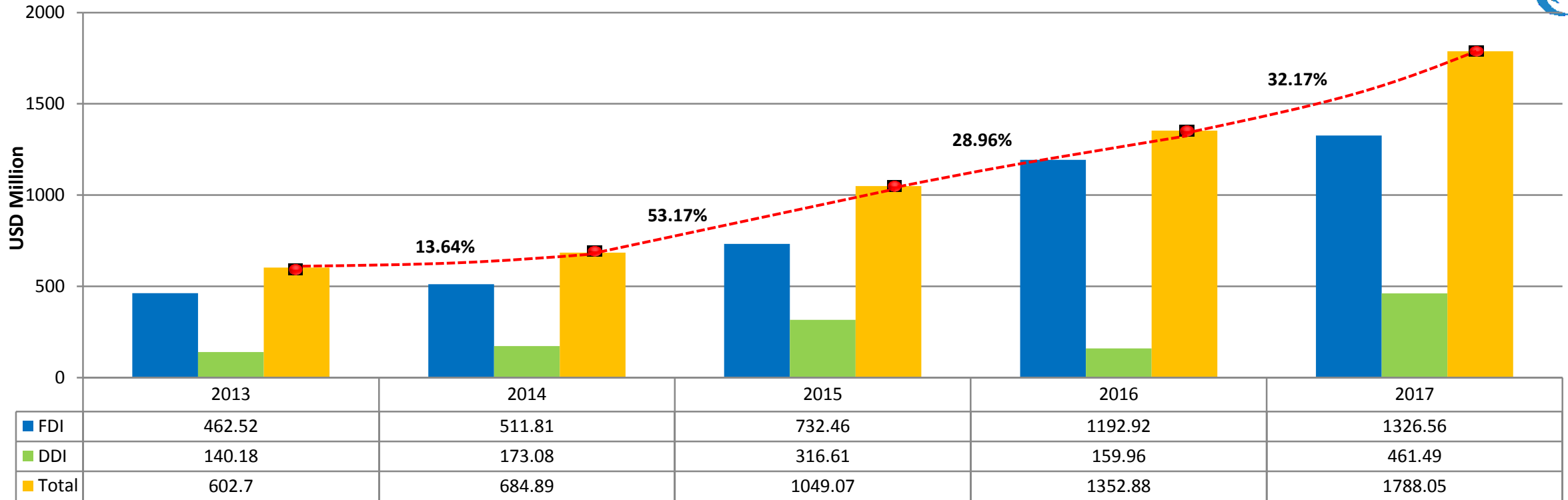


Wakatobi, South East Sulawesi



Morotai, North Maluku

TOURISM INVESTMENT REALISATION



1,788.05
USD Million
Tourism Investment Realization
Jan-Dec 2017

32%
 Growth from 2016 to 2017

102%
 Reached from total target in 2017

Top-10 Tourism Priority Destinations

Lake Toba

Area : 500 Ha Investment :
USD 1.6 Billion

Tanjung Kelayang

Area : 324 Ha
Investment : USD 1.4 Billion

Borobudur

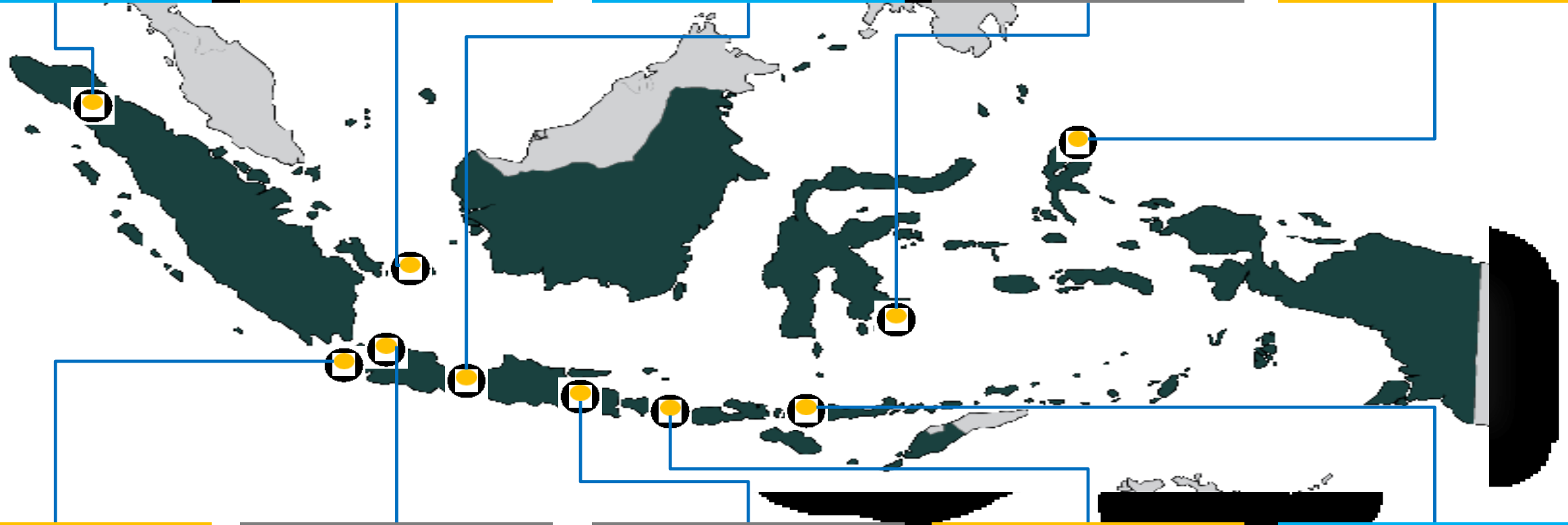
Area : 309,5 Ha Investment
: USD 1.5 Billion

Wakatobi

Area : 532 Ha Investment :
USD 1.5 Billion

Morotai

Area : 300 Ha Investment :
USD 2.9 Billion



Tanjung Lesung

Area : 1500 Ha Investment :
USD 4 Billion

Kep. Seribu & Kota Tua

Area : 1009 Ha Investment : USD
1.5 Billion

Bromo Tengger Semeru

Area : 325 Ha Investment : USD
1.4 Billion

Mandalika

Area : 1175 Ha Investment
: USD 3 Billion

Labuan Bajo

Area : 400 Ha Investment :
USD 1.2 Billion

Industry & Institution Development



HUMAN RESOURCES



ASEAN CERTIFIED TOURISM PROFESSIONALS (MRA TP)



- Basic Training for HR in Tourism Education = 15,750 people
- Competence Certification = 66,705 people

COMMUNITY



TOURISM AWARENESS CAMPAIGN (SAPTA PESONA ACTION)



- Basic Training for HR in the tourism community = 25,490 people
- Tourism Awareness Movement (around tourism destinations) = 4,360 people

INDUSTRY



STANDARD CERTIFICATION OF TOURISM BUSINESSES: ISO, ASEAN & SNI



- Basic Training for HR in the tourism industry = 5,280 people
- Tourism Industry profiling = 30%
- Tourism Business Standard = 50% (2 of 4 standard targets)
- Socialization of Tourism Business Standards and Certification = 50% (3 of 6 regions)

The Needs of Tourism Human Resources



Year	s.d 2014	2015	2016	2017	2018	2019
TOURISM WORKFORCE	11,000,000	11,400,000	11,800,000	12,200,000	12,600,000	13,000,000
• Direct Tourism Workforce : 30%*)	3,300,000	3,420,000	3,540,000	3,660,000	3,780,000	3,900,000
• Indirect Tourism Workforce : 50% *)	5,500,000	5,700,000	5,900,000	6,100,000	6,300,000	6,500,000
• Induce Tourism Workforce : 20% *)	2,200,000	2,280,000	2,360,000	2,440,000	2,520,000	2,600,000
CERTIFICATION						
Needs (30% from direct)	990,000	1,026,000	1,0620,000	1,098,000	1,134,000	1,170,000
Target						
1. Kemenpar Target (Per year)	58,627	17,500	35,000	65,000	75,000	70.000
Kemenpar Target (cumulative)	58.627	76.127	111.127	176.127	251.127	326.127
2. Independently Target (cumulative)	62,893	82,893	88,873	123,873	148,873	203,873
Total of Certified Tourism Human Resources (cumulative)	121,520	159,020	200,000	300,000	400,000	500,000
The needs' precentage of certified tourism HR	12,27%	15,50%	18,83%	27,32%	35,27%	42,74%
Realisasi						
Certified Tourism Human Resources (Kemenpar)	58,627	17,500	35,150	65,000	75.000	

Note :

HUMAN RESOURCE SERVICES IN TOURISM INDUSTRY CONSISTS :

1. Hospitality
2. Attraction and destination
3. Event
4. Travel and transportation services

Strategi Pengembangan Investasi Pariwisata



Program Prioritas Kementerian Pariwisata



Top 3 Priority Programs



Digital Tourism (E-Tourism)

- 63% of all travels, searched, booked, purchased and sold are online
- 50% from all online travel sales involves more than 1 devices
- More than 200 reviews per minute posted on TripAdvisor



Homestay

- Ministry of Tourism contributes to the development of 100 thousand homestay as part of the 1 Million Home Program
- President Jokowi plans to develop a rural tourism concept



Air Accesibility

Air Connectivity is the Success Factor to push international visitor growth because 75% - 80% international tourists arrive with air transportation

Others Priority Programs



Branding / PR-ing



Top 10 Originasi



Top 3 Main Destinations
(15 Destination Branding)



Development of 10 Priority Tourism Destinations



Human Resource Competence Certification & Tourism Awareness Movement



Tourism Investment Enhancement



Crisis Center Management



Kemudahan Masuk Indonesia



1. Free Visa

Peraturan Presiden No 21 Tahun 2016; → **15 negara tahun 2013 menjadi 169 negara tahun 2016**



2. Simplifying Yacht Arrivals

Waiving Clearance Approval for Indonesia Territory (CAIT) Policy → **pengurusan izin masuk dari 3 minggu menjadi 3 jam**



3. Abolition of Cruise Cabotage Principle

To allow passengers of foreign cruise ships → **masuk dan keluar dari 5 pelabuhan utama yaitu Tanjung Benoa (Bali), Tanjung Mas (Semarang), Belawan (Medan), Tanjung Perak (Surabaya), Tanjung Priuk (Jakarta), dan Makassar**



Kemudahan Berusaha Sektor Pariwisata



Berdasarkan Perpres No.44 Tahun 2016 tentang Bidang Usaha yang Tertutup dan Bidang Usaha yang Terbuka dengan Persyaratan di Bidang Penanaman Modal

36 Usaha pariwisata terbuka **100%** untuk Penanaman Modal Asing



16 Usaha pariwisata terbuka dengan persyaratan (**67%**)



4 Usaha pariwisata yang dicadangkan untuk UMKM:
▪Pondok Wisata
▪Travel Agen
▪Jasa Pramuwisata
▪Sanggar Seni



1 Usaha pariwisata yang tertutup untuk penanaman modal: kasino / perjudian



Kebutuhan Investasi Pariwisata



120,000
Hotel Rooms



15,000
Restaurants



100
International
Recreational Parks



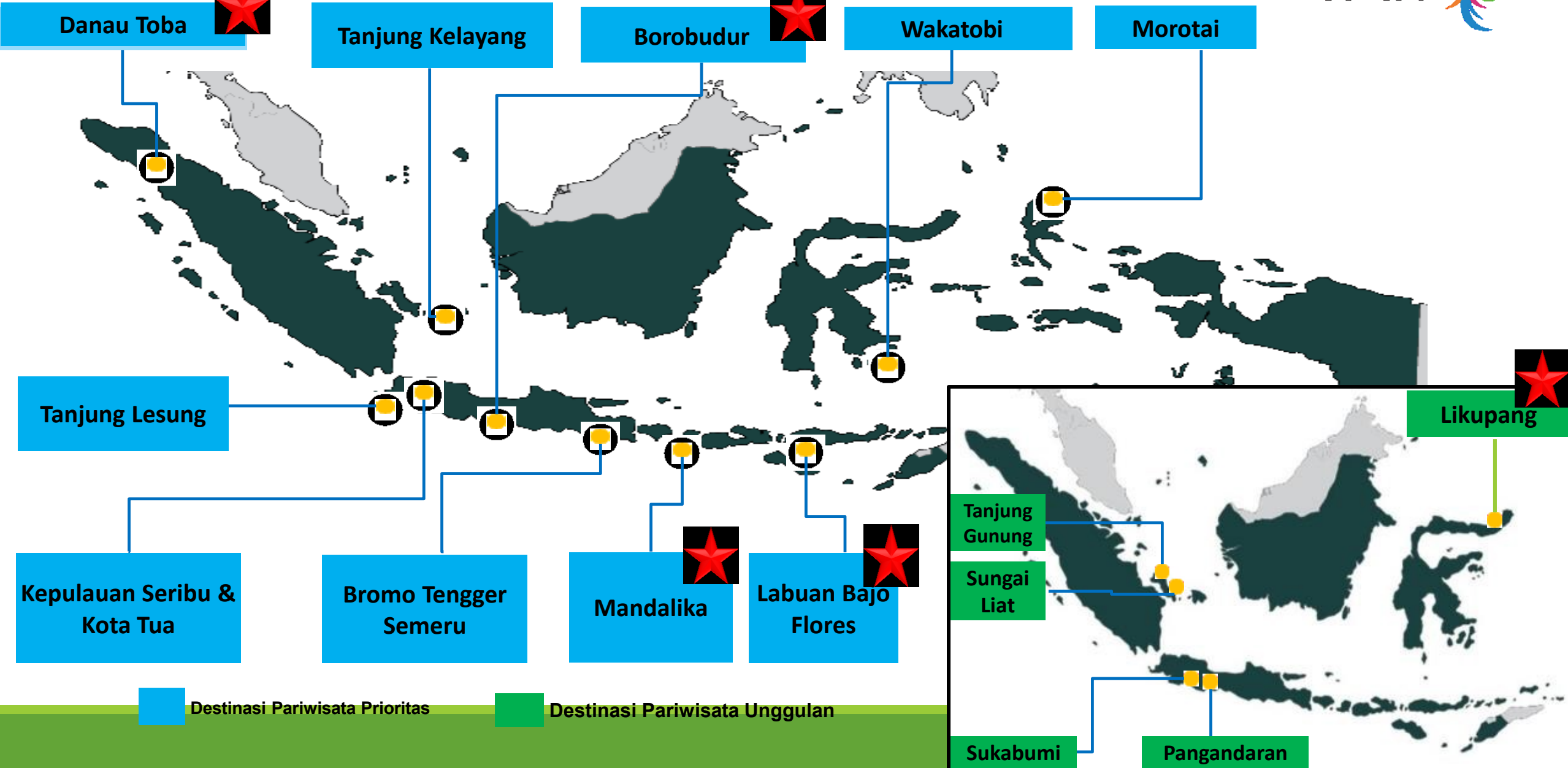
100
Diving Operators



100
Marinas

5 DESTINASI SUPER PRIORITAS

(10 Destinasi Pariwisata Prioritas dan 5 Destinasi Pariwisata Unggulan)





Strategi Pengembangan Investasi Pariwisata



DEREGULASI

- Penyusunan Pedoman KUR Sektor Pariwisata (2019)
- Kajian Faktor Penarik Investasi di KEK (2019)
- Kajian Target Market Investasi Pariwisata (2020)
- Kajian Insentif Fiskal untuk Akselerasi Usaha Pariwisata (2020)

PROFILING

- Profiling Usulan KEK Maguwo dan Parangtritis (2019)
- Profiling Usulan KEK Sukabumi (2019)
- Profiling Usulan KEK Rupaat dan Pekanbaru (2020)
- Profiling Usulan KEK Kalimantan Timur (2020)

PROMOSI

- Hospitality Investment Conference South Asia 2019
- Indonesia Infrastructure Investment Forum 2019
- Kawasan Ekonomi Khusus Awards 2019
- Indonesia Briefing 2020
- Tourism Hotel Investment & Networking Conference 2020

ADVOKASI

- Advokasi pengusulan masterlist KEK Tanjung Kelayang (2018)
- Advokasi Pengusulan KEK Likupang (2019)
- Advokasi Pengusulan KEK TanaNaga & TanaMori (2019/2020)
- Advokasi Pengusulan KEK Yogyakarta (2019/2020)

PENDANAAN

- Pendanaan oleh LPEI untuk Pengembangan KEK Mandalika (2019)
- Penyaluran KUR Sektor Pariwisata

DIGITAL TOURISM



DIGITAL TOURISM



Top-20 fastest growing tourism destination

Lifestyle : Personal, Mobile, Interactive

TELECOMMUNICATION

Highest forex earnings

70% search and share

TRANSPORTATION

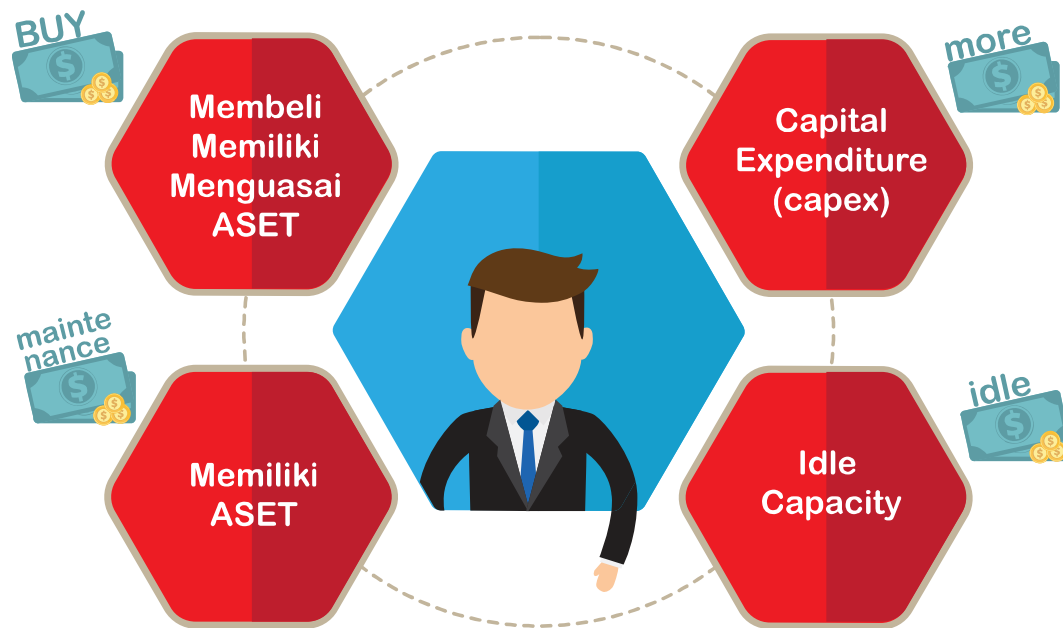
Create Job Opportunity

Digital media effectiveness is 4x more than that of conventional media

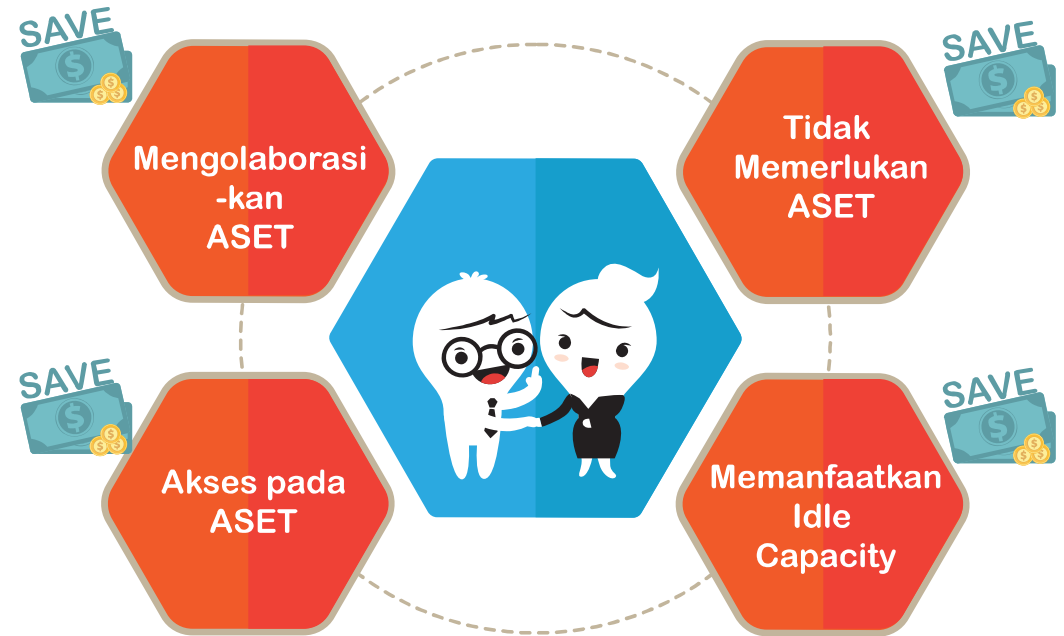
TOURISM

TREND INDUSTRI

OWNING ECONOMY



SHARING ECONOMY



DIGITAL COMPANY VALUE



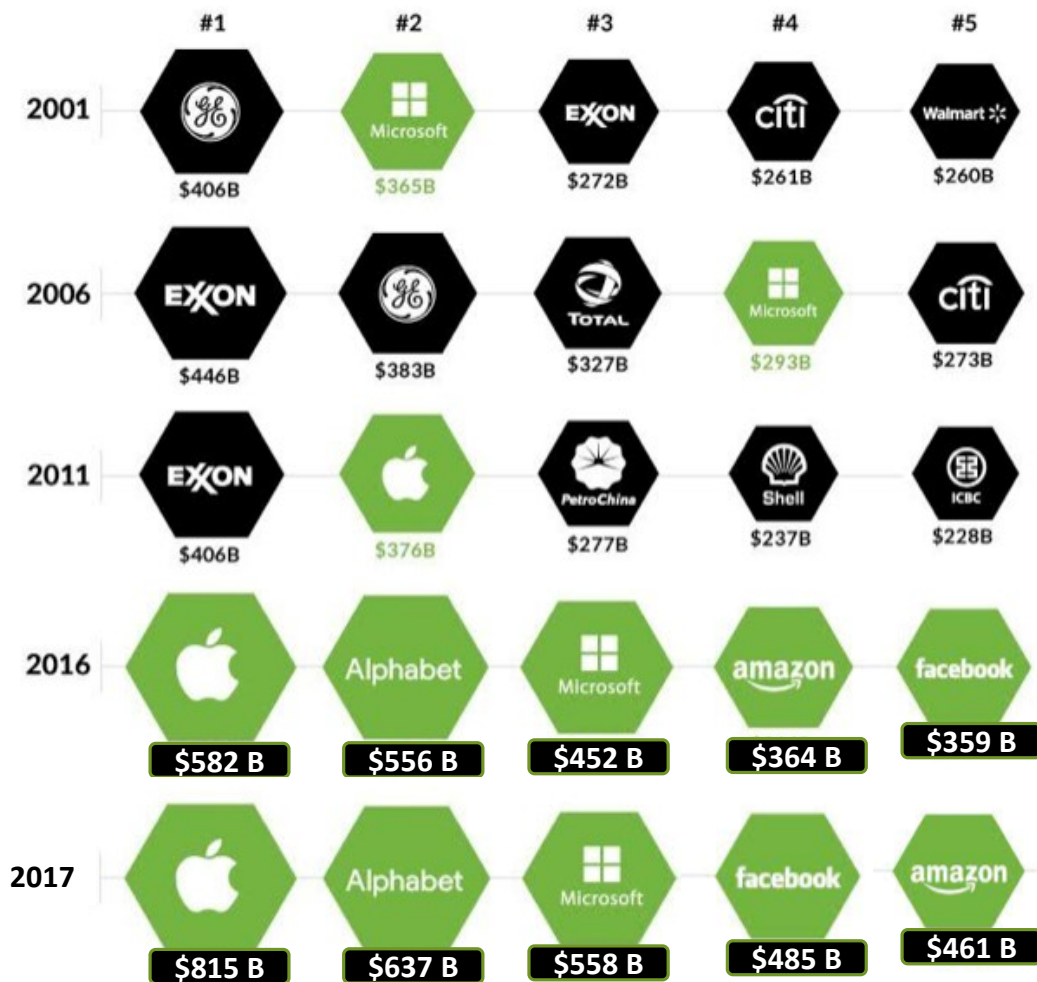
THE LARGEST COMPANIES BY MARKET CAP

The oil barons have been replaced by the whiz kids of Silicon Valley



Top 5 Publicly Traded Companies (by Market Cap)

■ Tech
 ■ Other



MARKET CAP INDONESIA

TRANSPORTATION COMPANY BY 2018

Product (Jasa) Konvensional

Perusahaan
Taksi

Maskapai
Nasional

9,8 T

12,3 T

Product (Jasa) Distrupction

Grab

GOJEK

US\$ 10 B

US\$ 3 B*

DIGITAL COMPANY TOURISM



Market Cap digital companies are much higher compared to conventional companies



Kategori Portal e-Tourism

Benchmark Market

	Market Cap (US\$ Bn)	Revenue	EV/ EBITDA	EBITDA
OTA				
The Priceline	62.3	8.44	18.67	3.29
Expedia Inc	12.5	5.76	16.69	0.75
Orbitz	1.3	0.9	11.14	0.14
Traveloka	1.1	0.1		
Average			15.5	

Metasearch				
Tripadvisor	11.94	1.25	31.03	0.375
Ctrip.com	8.83	1.18	-1.66	-5.31
Homeaway	3.05	0.45	38.69	0.065
Yelp Inc	3.53	0.38	129.14	0.02
Average			49.3	

Offline Travel Agent (IDR Milyar)				
Panorama	630	1,973	7.2	144
Bayu Buana	371	1,676	3.6	48

Indonesia Market	OTA (Airline/Hotel)	Meta Search	Travel (POI) Portal	Tour Package
Top Player (based on Alexa Traffic rank)	1. Traveloka 2. Tiket.com 3. Pegi-peg 4. Nusatrip 5. Tiket2 6. Agoda	1. Tripadvisor 2. uTiket 3. Skyscanner 4. Wego	1. Detiktravel 2. Wonderful Indonesia	Valadoo
Business Model	• Fee/Trx • Discount • Advertising Indonesia	• Fee/Pageview (Hotel) • Fee/trx (Airlines) • Advertising	• Advertising • Listing fee	Rev/Trx

Pengembangan Usaha Rintisan (Start Up) Pariwisata



Pengembangan Usaha Rintisan (Start Up) Pariwisata

Young Entrepreneur in Tourism - From Creativity to Commercial



1. Wonderful Start Up Academy

2. Nomadic Tourism

3. Digital Destination

wonderful
STARTUP
academy



1. Wonderful Startup Academy



The First TOURISM STARTUP

Incubator Program
in **Indonesia**

180 Applicants

in 26 Days

**From all over
Indonesia**

(Banda Aceh to Papua)
20 Dec 2016 to 15 Jan 2017

10 Startups on third selection
39 Startups on second selection
68 Startups in first step Selection
34 Weeks
50 Experts
16 Coachs & Mentors

**Deep & Wide Insight & network
In Indonesia Tourism
Market & Industries.**

**62 VALUABLE
Sessions**

WSA Startups are part
tourism value chains
sectors

WSA on WOW Brand Festive Day 2017



Mendapatkan pengalaman dan free past untuk berdiskusi langsung dengan para speaker dan peserta yang terdiri dari para brand manager dari perusahaan nasional dan International



2. Nomadic Tourism

Solusi Sementara sebagai Solusi Selamanya



Caravan

Hotel karavan ini bisa berpindah harian atau mingguan, untuk mencari spot-spot terindah di suatu destinasi wisata.



Glamping

glam camp (glamour camp), semacam tempat camping tapi dengan fasilitas akomodasi kelas bintang. Glamping (glamour camping) kini menjadi tren berlibur gaya baru di seluruh dunia dimana wisatawan ingin mendapatkan pengalaman menyatu dengan alam tapi tetap mendapatkan layanan akomodasi

layaknya di hotel berbintang



HomePod

Homepod atau “rumah telur” yang juga bisa portable. Kalau karavan bisa berpindah dalam ukuran hari; glam camp bisa bulanan; maka homepod bisa enam bulan atau setahun dipindah. Ya, karena homepod ini semi-fixed

dengan berat sekitar 2 ton dan bisa

dibongkar

NOMADIC TOURISM ACCESS



SEAPLANE



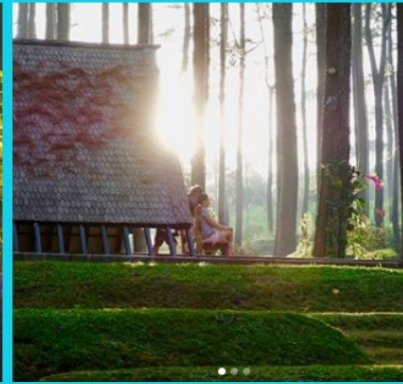
HELICITY



LIVE ON BOARD

Building Nomadic Ecosystem

Orchid Forest Case Study



f
Forestra
FOREST + ORCHESTRA



Jl.Genteng, Tangkuban Parahu, Cikole KM.8
Lembang, Kab. Bandung Barat

@orchidforestcikole

Bandung Philharmonic Orchestra • Doel Sunardi
Monita Tahalea • Pusakata • Teza Sumendy
Tampi • The Groove • Juicyluicy

Cp: Bagus Maulana 08131312490
Nexa Paisan 087824166843



3. DESTINASI DIGITAL



DESTINASI ZAMAN NOW



1 POSITIONING: **Esteem Economy**
Customers; Kids Zaman Now 70% Eksis di Dunia Maya, Media Sosial, Media Digital.

2 DIFFERENTIATING: **Destinasi Digital**
Product; Destinasi yang Instagramable, Instagenic, 1001 spot foto yang layak diposting di semua platform media sosial.

3 BRANDING: **Destinasi Zaman Now**
Promotion; Tagline Pasar Genpi, Pasar Zaman Now.

DESTINASI DIGITAL



54 Destinasi Digital di Seluruh Indonesia

LOMBA FOTO INSTAGRAM
TEMA: PESONA GANDRUNG SEWU BANYUWANGI 2018

UPLOAD HASIL JEPRETAN-MU YANG PALING KEREN & MENANGKAN

Juara 1
4.000.000
Juara 2
3.000.000
Juara 3
2.000.000
Juara Favorit
1.000.000

7 Foto "yang memiliki unsur Sapta Pesona: Aman, Tertib, Bersih, Sejuk, Indah, Ramah Tamah, Kenangan" Akan Mendapat Sweater Wonderful Indonesia Exclusive Periode Lomba 20 - 22 Oktober 2018
Pemenang akan diumumkan pada 24 Oktober 2018

pesona indonesia



Pasar Lontara

mariki ramaikan

Benteng Somba Opu
Minggu, 7 Okt 2018

PASAR INTI

pesona indonesia

Grand Opening Pasar Botani
Land of Flowers

SPECIAL GUEST
AYU SHITA

Powered by: GENPI LOMBOK SUMBAWA

pesona indonesia

Gebyar Pasar Kumandang

Gelaran ke - 19
Minggu Wage, 21 Oktober 2018
Pukul 06.00 - 12.00

- Kuliner Tradisional
- Permainan Tradisional
- Pertunjukan seni
- Pameran Foto KPW (Komunitas Photographer Wonosobo)
- Deklarasi Genasri (GenPI Wonosobo)

IG @pasarkumandang
FB Pasar Lawas Kumandang

pesona indonesia

DESTINASI DIGITAL JAWA BARAT

PASAR CIKUNDUL SUKABUMI



PASAR MAYA ASIH, KUNINGAN



Millennials Tourism



MILLENNIALS TOURISM

By 2030, Asia will be home to 57% of the world's 15-35 year-olds



*Population of 15-35 year-olds by 2030: (Forecast:
UNDESA, 2014)*

- *China : 333 million*
- *Indonesia : 82 million*
- *Philippines : 42 million*
- *Vietnam : 26 million*
- *Thailand : 19 million*

Potensi Millenials



1. Millenials memiliki needs dan behaviour yang distinct, khususnya karena mereka sangat bergantung pada teknologi dan sosial media → **Segmentasi terbaik adalah tidak mensegmentasi**
2. Millenials sebagai segmen yang penting karena size dan influencing powernya → **Big and Loud**
3. Diperlukan pengembangan strategi marketing khusus sebagai suatu inisiatif untuk mengkapitalisasi potensi masa depan industri pariwisata → **Who wins the future, wins the game**



Generasi Pesona Indonesia (GenPI) & Generasi Wonderful Indonesia (GenWI)

Generasi Pesona Indonesia (Genpi) dan Generasi Wonderful Indonesia (Genwi)



COMMUNITY

Komunitas anak muda yang bersifat sukarela yang bergerak di sosial media.

INTEREST

Mempunyai ketertarikan dibidang Pariwisata

ETHIC

Tidak memposting tentang politik, hoax, dan SARA.

POSTING

Memposting tentang : Destinasi Pariwisata, Calender of Event Pariwisata, dan Kebijakan Pariwisata

Implementasi

Traveling Trip, Fotografi, Videografi, Trending Topic di Media Sosial.

Trending Topic

Trending Topic Indonesia

Minggu, 15 September 2018
Pukul 11.00 WITA

Tren Indonesia · Ubah

#LombokBANGKIT

Andini Nuriaaa, #nutylaraswaty #genpibanten, dan 1 lainnya menge-Tweet tentang ini

#KirabSatuNegeri2018

1.064 Tweet

#CrazyRichBekasians

Upil Dinosaurus menge-Tweet tentang ini

#AudisiMI2019Surabaya

#PesonaTanjungLesung2018

1.062 Tweet

Minggu

37,7 rb Tweet

Cinta

45,2 rb Tweet

Maurizio Sarri

6.345 Tweet

Ma'ruf Amin



Semangat Kementerian Pariwisata melakukan recovery pascagempa di Nusa Tenggara Barat (NTB) menysar ke semua pihak. Kali ini, trauma healing dilakukan di Gili Trawangan, Lombok. Sebanyak 500 orang pelaku industri pariwisata akan terlibat dalam program ini

Trending Topic Indonesia

Rabu, 19 September 2018
Pukul 12.45 WIB

Tren Indonesia · Ubah

#PesonaIMFWBAnnualMeetings

Nurul Isti menge-Tweet tentang ini

#MVRinduku

Vicky Prasetyo

#2019TetapSemangat

Konklusi menge-Tweet tentang ini

Seoul

46,9 rb Tweet

China Open 2018

6.860 Tweet

Buwas

10,1 rb Tweet

Fahri

2.007 Tweet

Pengendara

5.742 Tweet



Menteri Keuangan Sri Mulyani Indrawati (SMI) membuka seminar dalam program "Voyage to Indonesia" di Banyuwangi, Rabu (19/8/2018). Seminar itu digelar dalam rangkaian menyambut ajang International Monetary Fund (IMF) - World Bank (WB) Annual Meetings yang bakal digelar Oktober 2018 di Bali.

Trending Topic Indonesia

Rabu, 19 September 2018
Pukul 20.28 WIB

Tren Indonesia · Ubah

#PesonaFestivalTabot2018

yulfi agustiani22, Andini Nuriaaa, dan 1 lainnya menge-Tweet tentang ini

#AnakMudaBanten

#KUNFAYAKUNEPS49

#FENOMENATONIGHT

#PesonaIMFWBAnnualMeetings

Nurul Isti menge-Tweet tentang ini

Buwas

11,2 rb Tweet

20.30 WIB

15.30 WIB

1.469 Tweet

PlayStation Classic

68,1 rb Tweet

Rita Lee

38,1 rb Tweet



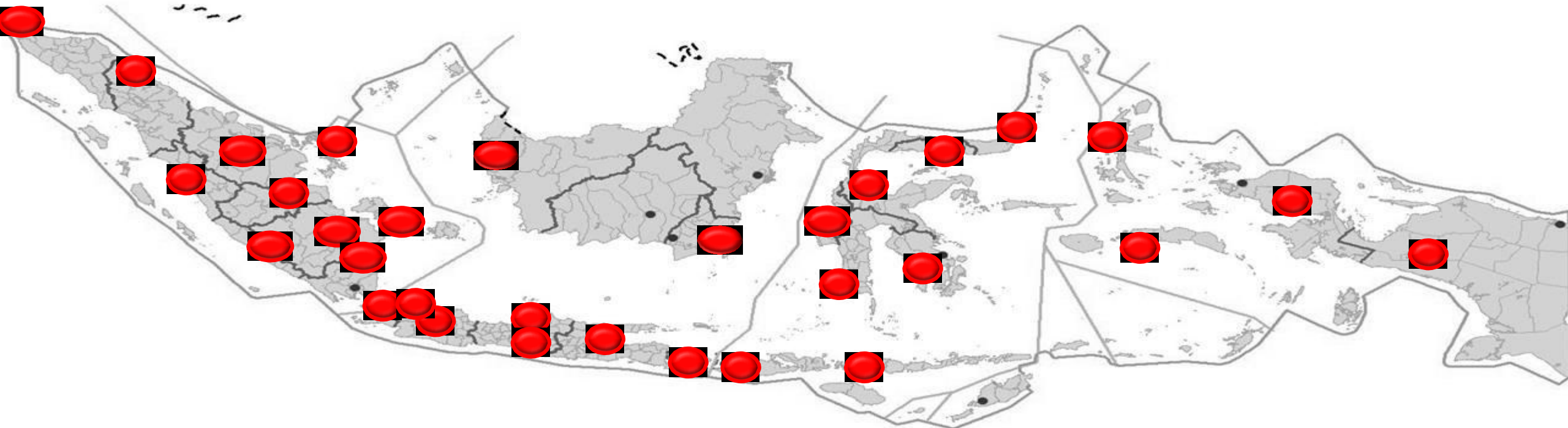
BANYAK upaya yang bisa dilakukan oleh sebuah daerah untuk memajukan sektor pariwisata daerahnya. Inilah yang sedang dilakukan oleh Bengkulu, melalui perhelatan festival Tabot. Tahun ini, festival tabot masuk ke dalam kalender acara 100 Wonderful Events Indonesia dihadiri langsung oleh Menteri Pariwisata Republik Indonesia, Arief Yahya.

GENERASI PESONA INDONESIA DAN WONDERFUL INDONESIA



Generasi Pesona Indonesia (GenPI)

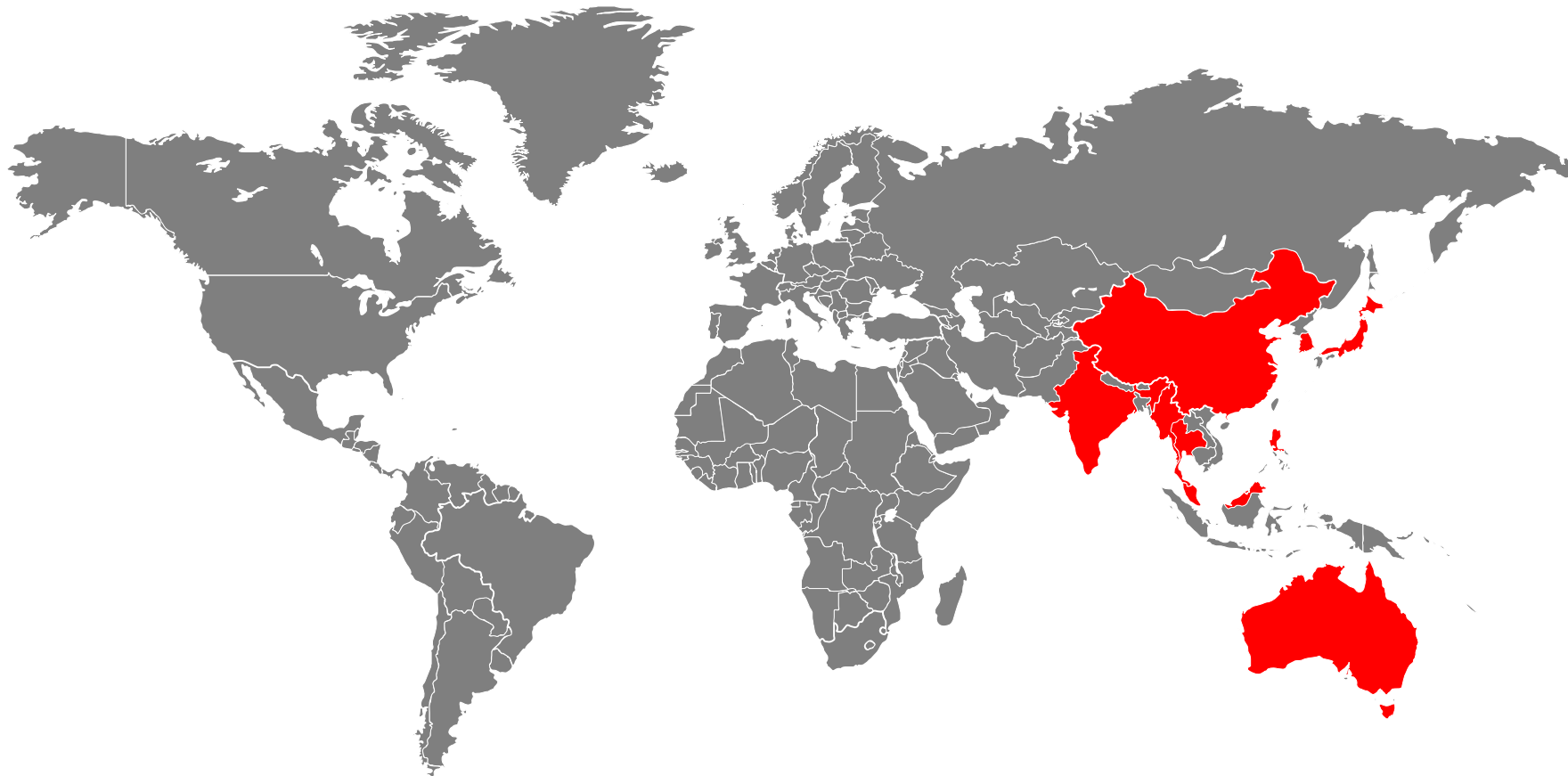
32 Provinsi



- | | | | | |
|---------------------------|---------------------------|----------------------------|-----------------------------|--------------------------|
| 1. Genpi Aceh | 8. Genpi Yogyakarta | 15. Genpi Maluku | 22. Genpi Bengkulu | 29. Genpi Gorontalo |
| 2. Genpi Sumatera Utara | 9. Genpi NTB | 16. Genpi Maluku Utara | 23. Genpi Kalimantan Barat | 30. Genpi Sulawesi Barat |
| 3. Genpi Sumatera Selatan | 10. Genpi NTT | 17. Genpi Riau | 24. Genpi Sulawesi Tengah | 31. Papua |
| 4. Genpi Banten | 11. Genpi Sumatera Barat | 18. Genpi DKI Jakarta | 25. Genpi Jambi | 32. Papua Barat |
| 5. Genpi Jawa Barat | 12. Genpi Kepri | 19. Genpi Sulawesi Utara | 26. Genpi Sulawesi Utara | |
| 6. Genpi Jawa Tengah | 13. Genpi Bangka Belitung | 20. Genpi Sulawesi Selatan | 27. Genpi Kalimantan Timur | |
| 7. Genpi Jawa Timur | 14. Genpi Sumatera Barat | 21. Genpi Bali | 28. Genpi Kalimantan Tengah | |

Generasi Wonderful Indonesia (GenWI)

10 Negara



1. Genwi Malaysia
2. Genwi Singapura
3. Genwi Thailand
4. Genwi Philipina
5. Genwi Tiongkok
6. Genwi India
7. Genwi Jepang
8. Genwi Korea
9. Genwi Australia
10. Genwi New Zealand

3 Ultimate Weapons 2019



MARKETING STRATEGY 2019



Ordinary | Extra Ordinary | Super Extra Ordinary

<p>ORDINARY</p> <p>BAS : 40 %</p> <p>Branding : 20% x 40%</p> <p>Advertising : 30% x 40%</p> <p>Selling : 50% x 40%</p>	<p>SUPER EXTRA ORDINARY</p> <p>BHL : 30 %</p> <p>Border Tourism : 30% x 30%</p> <p>Hubbing : 60% x 30%</p> <p>LCT : 10% x 30%</p>
<p>EXTRA ORDINARY</p> <p>IHC : 30 %</p> <p>Incentives : 50% x 30%</p> <p>Hot Deals : 25% x 30%</p> <p>CDM : 25% x 30%</p>	

2018

2019

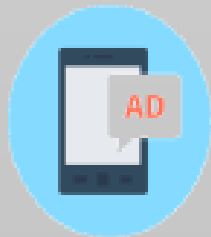
TIGA SENJATA PAMUNGKAS 2019

1 SUPER EXTRA ORDINARY EFFORTS	2 EXTRA ORDINARY EFFORTS	3 ORDINARY EFFORTS
 <div data-bbox="637 586 937 772" style="background-color: #f4a460; border-radius: 15px; padding: 10px; text-align: center;"> <p>Border Tourism</p> </div>	 <div data-bbox="1245 586 1549 772" style="background-color: #8e44ad; border-radius: 15px; padding: 10px; text-align: center;"> <p>Insentif Akses</p> </div>	 <div data-bbox="1819 586 2122 772" style="background-color: #3498db; border-radius: 15px; padding: 10px; text-align: center;"> <p>Branding</p> </div>
 <div data-bbox="637 805 937 991" style="background-color: #f4a460; border-radius: 15px; padding: 10px; text-align: center;"> <p>Tourism Hub</p> </div>	 <div data-bbox="1245 805 1549 991" style="background-color: #8e44ad; border-radius: 15px; padding: 10px; text-align: center;"> <p>Hotdeals</p> </div>	 <div data-bbox="1819 805 2122 991" style="background-color: #3498db; border-radius: 15px; padding: 10px; text-align: center;"> <p>Advertising</p> </div>
 <div data-bbox="637 1023 937 1209" style="background-color: #3498db; border-radius: 15px; padding: 10px; text-align: center;"> <p>Low Cost Terminal</p> </div>	 <div data-bbox="1245 1023 1549 1209" style="background-color: #8e44ad; border-radius: 15px; padding: 10px; text-align: center;"> <p>CDM</p> </div>	 <div data-bbox="1819 1023 2122 1209" style="background-color: #3498db; border-radius: 15px; padding: 10px; text-align: center;"> <p>Selling</p> </div>



Branding

- Branding through the promotion in online, electronic, printed and out-of-home media (according to market needs)
- Increasing destination branding
- Regional event promotion
- Famtrip



Advertising

- Promotion in online media, electronic, printed and out-of-home media (according to market needs)
- Promotion in main destinations
- Publication of 100 Calendar of Events



Selling

- Exhibiton
- Sales Mission
- Festival (Abroad)
- Joint promotion with Airlines, Ferry and Wholesaler



Incentives Access

- a. Fully Charter Airlines/Ferry
- b. Block Seats Regular Flight
- c. Joint Promotion (Existing & New Routes)



Hotdeals

- a. HOTDEALS Kepri
- b. HOTDEALS Jakarta
- c. HOTDEALS Bali



CDM

- a. To gather travelers data from online sources
- b. Profiling and segmentation of travelers data
- c. To target *travelers* with customized and targeted advertising campaign.



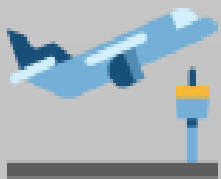
Border Tourism

- a. Ferry Joint Promotion/ Hotdeals KEPRI
- b. Cross Border Events (Music, Sport, Religious)
- c. Digital Market (Border Land)
- d. MPD Development



Tourism Hub

- a. Joint promotion with Wholesalers/TATO in Singapore
- b. To make use of Cash Incentives dan HotDeals strategy.



Low Cost Terminal

- a. Joint Promotion with AP2/ AP1 which implement LCT by lowering operational cost and PSC.
- b. Joint Promotion (placement) with airlines which open international routes in the LCT.



THANK YOU

