

รายงานการวิจัยฉบับสมบูรณ์
(Final Research Project Report)

จุดยืนภาพลักษณ์ทางการท่องเที่ยวของกลุ่มประชาคมเศรษฐกิจอาเซียน
กรณีศึกษาประเทศอินโดนีเซีย



ASEAN Image Positioning:
The Case Study of Indonesia

โดย

ดร. พิมพะระวี โรจน์รุ่งสัจย์





สำนักประสานงานการพัฒนาและจัดการท่องเที่ยวเชิงพื้นที่อย่างยั่งยืน
สำนักงานกองทุนสนับสนุนการวิจัย

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เสนอต่อ

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สำนักงานกองทุนสนับสนุนการวิจัย (สกว.)

สร้างสรรค์ปัญญาเพื่อพัฒนาการท่องเที่ยวไทยให้ยั่งยืน

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While traveling in Indonesia for the research, I received great hospitality from old and new Indonesian friends: Dr. Erna, Dr. Rara, Prof. Pitana, Ika, Agus, and colleagues who joined the focus group meeting. Thank to them for all inputs which fulfilled this study. Lastly, thank to my parents who always encourage me in every situation.

EXECUTIVE SUMMARY

The Thailand Research Fund supported the project of ASEAN Image Positioning which aim to establish and strengthen collaborative networks among all tourism-related stakeholders and to create ASEAN databank to facilitate the growth of tourism in ASEAN. This project was a part of the ASEAN Image Positioning Project focusing on Indonesia. The research objectives of the study were to analyze tourism situation of Indonesia; to propose tourism image positioning of Indonesia; to create network of tourism researchers in Thailand and tourism business sectors and other stakeholders in Indonesia; and to serve information for tourism information bank of ASEAN.

There were two phrases of research methodology. Firstly the data collection and analysis was implied by using secondary data analysis from at least 20 top tourism websites informing tourism of the country, 20 travelogues of tourists who have been to the country, articles, and tourism news. Content analysis was employed to organize the data received. Interview of tourism business sectors in Thailand and key persons from the embassy was implemented. Results were used as a basis for image position development at a later stage (second phrase). In the second phrase, the focus group meeting in Indonesia was employed to collect information from different key informants on the issues and concerns of tourism in Indonesia as well as their opinions on the strength, weakness, opportunity and threat they perceived from tourism of the country. They also were asked to give recommendations on the main attractions and tourism image. Tourist interview at different attractions in Indonesia was also employed to organize and confirm the data received.

The results of the study were SWOT analysis of tourism in Indonesia, the image and themes of tourism of the country and fifteen recommended attractions. The image that the key informants voted for was "Where Culture and Nature Blend". The tourism themes were Cultural Tourism, Nature-based Tourism and Ecotourism.

The focus group was asked to input fifteen main attractions which represent tourism in the country and to be published in ASEAN Tourism Book. From the process of brainstorming, the result of fifteen attractions were: Borobudur, Bali, Yogyakarta, Tana Toraja, Toba Lake, Komodo Island, Bunaken National Park, Raja Ampat, Tanjung Puting National Park, Leuseur, Way Kambas National Park, Jakarta, Bandung, West Sumatera, and Kalimutu Lake

ABSTRACT

This study examined tourism situation of Indonesia and the country's image positioning.

There are two phrases of the research. First was secondary data analysis and interview

Thai travel agents who arrange tour to the country to acquire initial data. Then the

researcher travel to Indonesia to do a focus group with the key professionals to gain input

and comments about SWOT of tourism in Indonesia and agreement on image and themes

of tourism. Also, there was valuable details from the discussion which lead to the

improvement of the ASEAN tourism network.

บทคัดย่อ

การวิจัยเรื่อง จุดยืนภาพลักษณ์ทางการท่องเที่ยวของกลุ่มประชาคมเศรษฐกิจอาเซียน กรณีศึกษาประเทศอินโดนีเซียนี้เป็นการศึกษาถึงสถานการณ์ทางการท่องเที่ยวของประเทศอินโดนีเซีย และหาจุดยืนภาพลักษณ์ทางการท่องเที่ยวที่โดดเด่นของประเทศ การวิจัยครั้งนี้แบ่งเป็นสองขั้นตอนดำเนินการ คือ เริ่มต้นศึกษาค้นคว้าจากข้อมูลทุติยภูมิ และจากการสัมภาษณ์บริษัทท่องเที่ยวในประเทศไทยซึ่งมีการจัดทัวร์ไปยังประเทศอินโดนีเซียเพื่อเป็นข้อมูลเบื้องต้นที่สำคัญ ในขั้นตอนที่สองนักวิจัยได้เดินทางไปยังประเทศอินโดนีเซียเพื่อที่จะจัดการประชุมกลุ่มตัวแทนผู้เชี่ยวชาญทางการท่องเที่ยวของประเทศอินโดนีเซีย เพื่อที่จะได้ข้อเสนอแนะและความคิดเห็นเกี่ยวกับสถานการณ์ทางการท่องเที่ยวทั้ง จุดแข็ง จุดอ่อน โอกาสและภัยคุกคาม ของประเทศอินโดนีเซียโดยนำข้อมูลที่ศึกษาเบื้องต้นในขั้นแรกให้ผู้เชี่ยวชาญพิจารณา นอกจากนี้จะได้ความคิดเห็นเกี่ยวกับภาพลักษณ์ทางการท่องเที่ยวและประเภทการท่องเที่ยวที่โดดเด่นของประเทศ จากผู้เชี่ยวชาญ ในการประชุมยังมีรายละเอียดเนื้อหาเกี่ยวกับการพัฒนาความสัมพันธ์ทางการท่องเที่ยวในกลุ่มประเทศประชาคมเศรษฐกิจอาเซียนอีกด้วย

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INTRODUCTION

The Asia-Pacific region has exhibited strong growth rates of tourist arrivals over the last two decades due to growing number of new destinations being offered in the region. Also the continually improved air access in the region has reduced both the travel time and the cost of flying. Asia and the Pacific has been one of the fastest growing regions for tourism as destination due to the diversity and attractiveness of the natural environment and cultural heritage. Rising income and increased leisure time have been the main reasons behind increased international travel (Mill & Morrison, 1985). Since 1995, over two thirds of tourists to Asian and Pacific countries and areas were from places within the region. Intraregional tourism has clearly been a major part of the rapid expansion of the Asia and Pacific tourism industry (APEIS, 2006). Moreover, the rapid growth of Asian economies before the 1997 economic crisis has created a growing middle class in the Asian Tiger economies who have boosted intraregional tourism. However, as reported by a study undertaken by WTO, the share of world arrivals decreased slightly in 1998 compared to 1995 due to the Asian economic crisis. Consequently the average annual growth rate for the Asia-Pacific region showed down considerably in the second half of 1990s. While tourist arrivals in the region have over quadrupled since 1980, with a growth rate of more than 8.2 per cent over the period 1980-1998 (APEIS, 2006).

Many countries in the region are taking affirmative action to mitigate the impact of the financial and economic crisis and give tourism a new impetus (Singh, Timothy, & Dowling, 2003). In the context, promotional activities in the tourism sector are being intensified (Boniface & Cooper, 2005). There is also a trend towards the promotion of conservation as well as restoration of national arts and culture, and tourism resources (Boniface & Cooper, 2005; Cook, Yale & Marqua, 2002). The concept of sustainable tourism development is becoming a priority area of concern to tourism policy makers. Countries in the Asia-Pacific region have therefore formulated their strategies to meet the emerging challenges facing

their tourism sector. There was the promotion of the ASEAN initiated programme of Visit ASEAN Year 2002.

Although the economic and financial crisis in some parts of the Asian and Pacific regions has somewhat disturbed the promising trend that the tourism industry was expected to enjoy, such changes provide countries with both challenges and opportunities for strengthening further national capacities, especially in promoting regional and international tourism activities. Indeed, unexpected economic disruptions at regional and subregional levels call for remedial actions, in order to regain the continuous and uninterrupted rapid expansion that many Asian and Pacific countries, including those from ASEAN, had seen earlier in their tourism sector (Boniface & Cooper, 2005; ECTWT & TEN, 1986).

Possible course of action by ASEAN

One of the goals of these countries should therefore be to liberalize and harmonize rules and procedures governing cross-border access, paving the way for both international and intraregional tourism expansion. This can be achieved by countries through communicating and finding a mutually accepted set of rules and measures appropriate for the safe management of international and intraregional tourism.

At the ASEAN Transport Ministers Meeting (ATM) held in Thailand in February 1997, it was agreed in principle that ASEAN's member countries should develop an integrated and harmonized trans-ASEAN transportation network within the subregion (ACD, 2003; Yue, 2006). The main objectives of the proposed ASEAN Highway Network Development are to link capitals of the respective ASEAN's member countries, major industrial and agricultural areas, main sea ports, and border crossing points with significant trade and tourism potential. With that understanding, the Ministerial Understanding on the development of the ASEAN Highway Network Project was then signed in Hanoi, Viet Nam, on 15-16 September 1999 and the following time table for its implementation was agreed upon:

- Year 2000: completion of the Network configuration and designation of national routes;
- Year 2004: installation of road signs on all designated national routes, which are to be upgraded to high standard, construction of missing links and rendering all designated cross-border points operational;
- Year 2020: upgrading all designated national routes to primary road standards.

The Network of Asia-Pacific Education and Training Institutes (APETIT) was thus established at Meeting for the Establishment of a Network of Tourism Training Institutes and Organizations in the Asian and Pacific Region organized by the United Nations Economic and Social Commission for Asia and the Pacific (ESCAP) at Tehran from 22 to 25 September 1997. Now APETIT comprises 58 member institutes in 25 countries (Rahmatullah, 2000).

ESCAP Plan of Action for Sustainable Tourism Development

ESCAP did carry out several activities in tourism development and one of them is to formulate a Plan of Action for Sustainable Tourism Development in the Asian and Pacific Region. It sets forth proposals for action in six distinct theme areas. These are: human resources development in the tourism sector; economic impact of tourism; environmental management of tourism; infrastructure development and investment for the tourism sector; facilitation of travel; regional and subregional cooperation in tourism development (Rahmatullah, 2000).

When focusing in Indonesia, there is also ASEAN tourism networking. Like in other South-East Asian countries, the economic crisis adversely affected the Indonesia's tourism sector. While its mid-to-long-term potential is still considered promising, Indonesia's short-term prospects in tourism remain difficult. To meet these challenges, Indonesia has embarked into a number of public relations activities, such as arranging field visits for tour operators, travel agents and travel journalists and writers from major generating markets to Indonesia's

various tourism centers. Indonesia is also stepping up its engagement in regional collaboration, such as Indonesia-Malaysia-Thailand and Indonesia-Malaysia-Singapore growth triangles, and the Brunei-Indonesia-Malaysia-Philippines East ASEAN growth area (ACD, 2003).

This research also supports the ASEAN networking of tourism. It is a part of ASEAN image tourism study that focuses on Indonesia. The ASEAN countries will be explored their SWOT of tourism and tourism images as the core. The results will be a database for tourism information of ASEAN countries and help promoting tourism in each particular country in the right direction after clarifying their image positioning which will be agreed by the tourism experts of the country.

REVIEW OF LITERATURE

Travel and tourism is one of the world's largest industries, responsible for more than 10 per cent of global GDP (Boniface & Cooper, 2005; Mill, 1990). About 694 million international arrivals were registered in 2003, a figure estimated to double by 2020. Currently, developing countries receive about one third of the tourism trade, a number sharply rising (Rahman, 2005). Ten per cent of export earnings in developing countries come from tourism. The industry is one of the biggest global employers with more than 250 million jobs depending directly or indirectly on tourism. Sixty-five per cent of those jobs are in developing countries (APEIS, 2006).

The region in focus are Asia and the Pacific region which are the fastest growing regions, with a growth rate in international tourist arrivals of 8.4 percent between 2001 and 2002 (APEIS, 2006). The rapid increase in tourist arrivals and income from international tourism has encouraged ASEAN (Association of Southeast Asian Nations) governments to label the tourism industry the most important foreign exchange earner and provider of employment (Mill & Morrison, 1985; Mill, 1990; O' Grady, 1990; Boniface & Cooper, 2005; ACD, 2003; APEIS, 2006).

To develop tourism, it is necessary to understand tourism situation and potential of the country. Therefore, the SWOT (strength, weakness, opportunity, and threat) analysis is important before the further development. The analysis is based on the understanding that tourism has both positive and negative effects on destination countries (Mill & Morrison, 1985; Murphy & Murphy, 2004). The positive effects are such as economic growth, generation of foreign exchange, expansion of the service sector, creation of employment opportunities, diversification of the economy, and transportation and infrastructure development (Withington, 1985). But it has led to negative environmental, social, and cultural effects as well (Singh, Timothy, & Dowling, 2003; Rosenow & Pulsipher, 1979).

Negatively, it is one of the least regulated industries in the world and big travel corporations dominate the market. It is estimated that currently up to 50 per cent of revenues from tourism leave the country through foreign-owned businesses, imported goods, and promotional spending (O'Grady, 1990). In particular, the popular "all-inclusive" packages and the cruise industry leave hardly any profits for destination countries (APIES, 2006). Additionally, tourism is a very volatile industry, susceptible to political unrest, exchange rate fluctuations and natural disasters. This makes it a dangerous path to development, in particular, for the poorest of the community. Conversely, the exchange of values, which is encouraged by tourism, is generally seen as a positive trend (ECTWT, 1988; Mill, 1990). Tourist money can help sustain indigenous culture, language or religion (O'Grady, 1990).

As tourism spreads quickly around the world, always in search of new, untouched destinations, looking for a sustainable path to tourism becomes more urgent. Some tour operators realize that the industry relies on natural and cultural diversity as well as security of the destination to attract customers. Several tourism themes initiated by government sectors and business sectors were arisen to find the particular country's image position and also attract tourists to visit. In Asia the key-concepts that shed light on the image position are mainly ethnic identity and authenticity (Boniface & Cooper, 2005; ACD, 2003). Reconstructed ethnicity and ethnic identity invariably involve the objectification and reification of ethnic images and are produced particularly during the process that engenders a global network of interaction.

Asia is the focus of this research project. The region is home to over half of the world's population, possesses tremendous tourism potential with a broader range of tourism resources compared to other regions. As for the world's oldest cultures and civilizations, Asia is attracting a growing number of visitor arrivals (Boniface & Cooper, 2005; ACD, 2003). Every Asian country recognizes the importance of tourism as a major social and economic development instrument. Tourism cooperation in Asia will allow member countries to bring together their tourism products and jointly promote them for mutual benefit. This will

boost the industry's competitiveness, increase the region's negotiating power against other competing destinations and develop a more sustainable tourism industry (Boniface & Cooper, 2005; ACD, 2003, APEIS, 2005).

Based on the information provided by ACD (2003), in 2000, global visitors totaled 698.8 million (an increase of 7.4% over 1999), generating tourism receipts of US\$476 billion (up 4.5%). Europe has maintained its position as the most popular region with the biggest market share of 57.7% of total arrivals (403.3 million visitors). This was followed by the Americas (market share of 18.5%) and Asia Pacific (16.0%).

The WTO forecast that in 2010 and 2020, Asia (including the Asia-Pacific, South Asia and the Middle East) would become the world's second most popular destination. Europe will remain the top destination with a projected total of 242 million in 2010 and 485 million in 2020. These projections clearly show that the future of tourism to Asia will be strong. The region will attract an increasing number of visitors and revenue from other regions. However, intra-regional tourism is also a major force to boost tourism revenue flows and strengthen regional economies (Boniface & Cooper, 2005; ACD, 2003). In order to efficiently promote tourism growth, all Asian countries will have to work closely to ensure mutual benefits (ACD, 2003; Rahman, 2005; TRF, 2006). The clear example is ASEAN member countries that endeavor to foster tourism in the regions through cooperation and networking.

Tourism Cooperation Strategy in Asia are:

- Expand tourism cooperation while decrease competitiveness among all countries in Asia and promote intra-regional travel and tourism;
- Strengthen regional tourism by jointly developing tourism-related resources sustainable and promoting them in global markets;
- Cooperate in and implement tourism security measures around the Asian region;

- Boost the potential of regional tourism by increasing its competitiveness and bargaining power against other regions in order to create jobs and income in the countries of the region;
- Promote stronger partnership between public and private sectors as well as people in the Asia Cooperation Dialogue group;
- Promote mutual assistance among member countries to eliminate travel-and tourism-related obstacles, expand transportation networks, exchange of knowledge and technology as well as encourage more tourism-related investment within the region; and
- Highlight the principle of mutual gain around the region.

(ACD, 2003)

According to the ACD study, the new niche tourism products and services in Asia have become increasingly popular. These include cultural tourism to experience the ways of life of local people, multi-cities trip (joint tourism packages linking various region destinations), health and spa tourism, sports activities, cruising and adventure tourism. This leads to the importance of image position of each country and also the overall region in order to be able to compete with the fastest growing of tourism in other regions and tourist changing demand. The following Table 1, taken from ACD (2003), illustrates the strengths of Tourism in ASEAN.

Table1 : Tourism strengths of Asian countries categorized by market interests

Countries			Strengths									
			Culture	Multi-Cities Trip	Health and Spa	Sports		Cruise	Eco and soft Adventure	MICE	Pilgrimage	Special Events
						Golf	Diving					
ASEAN	GMS	Thailand	X	X	X	X	X	X	X	X	X	X
		Lao	X					X			X	X
		Myanmar	X	X				X	X		X	X
		Cambodia	X	X	X	X		X	X		X	X
		Vietnam	X	X				X	X		X	
		Singapore		X				X		X		
	IMTGT	Malaysia		X		X	X	X	X	X	X	
		Indonesia	X		X		X		X		X	
		Philippines		X			X	X	X			
		Brunei							X			
		China	X	X		X				X		X
		Japan	X	X				X		X		X
		South Korea	X	X				X		X		
	BIMSTEC	India	X					X	X	X	X	
		Pakistan									X	
		Bangladesh									X	
		Qatar							X			X
		Bahrain							X			

As shown in the table, products which are of interest in the markets are:

- Cultural tourism
- Ecotourism and soft adventure tourism
- Multi-cities trips / combination packages offering highlighted products of each member country
- Health and spa tourism
- Sports tourism e.g. golf and diving
- Cruises

In overall, ASEAN direction for cooperation according to those similar tourism themes and neighborhood emphasizes the following implementations:

- General more integrated tourism magnets within the region by initiating cooperation in tourism products and services development and management (physical or environment and services) as well as marketing cooperation to increase the region's competitiveness and boost visitor arrivals to/from and within the region;
- Encourage the private sector to coordinate with the public sector and act as a mechanism to generate commercial outcome in product improvement. (ACD, 2003)

To support the cooperation of tourism among the ASEAN countries, Thai Research Foundation has initiated the ASEAN Image Positioning Project. This project mainly examines tourism in Indonesia (Partly the project of ASEAN Image Position Project). This project is to support the ASEAN Collaborative Tourism Research Databank via ASEAN Tourism Stakeholder Network (TRF, 2006) that emphasize the collaboration among ASEAN countries for better development in tourism industry.

This project mainly examines tourism situation in Indonesia (Partly the project of ASEAN Image Position Project) as the research first phrase. This is to gain insight understanding of strengths, weaknesses, opportunities, and threats of tourism situation in Indonesia. This will

lead to the second phrase of research which are to develop active network among thai researchers and partners in related tourism business and government sectors of the country. This SWOT analysis and image position will gain their inputs and agreement before public presentations.

Research objectives of the study:

- To analyze tourism situation of Indonesia
- To propose tourism image positioning of Indonesia
- To create network of tourism researchers in Thailand and tourism business sectors and other stakeholders in Indonesia
- To serve information for tourism information bank of ASEAN

General information of Indonesia

The following information about Indonesia was the succinct information received from the review of travel websites of Indonesia (see references) as a core.



Geography

Indonesia, officially the Republic of Indonesia (Indonesian: *Republik Indonesia*), is a nation of islands consisting of almost 18,108 islands in the South East Asian Archipelago. There are about 6,000 islands that are inhabited, and scattered around the equator, giving the country a tropical climate. It is a country with many volcanic islands. Its location on the edges of tectonic plates, specifically the Pacific, Eurasian, and Australian makes Indonesia frequently hit by earthquakes and the resulting tsunamis. Indonesia has at least 66 volcanoes, the most famous one is Krakatau (*Krakatoa*), which was located between

Sumatra and Java. Flora and fauna differ markedly between Kalimantan, Bali, and western islands on the one hand and Sulawesi (Celebes), Lombok, and islands further east on the other. This ecological boundary has been called the 'Wallace line' after its discoverer. The line is often given as the boundary between Asia and Australasia, as such making Indonesia a bicontinental country and 45% of Indonesia is covered by forests.

Indonesia is the world's largest archipelagic nation. It is the world's 16th-largest country in area and its population density of 120.5 people per square kilometer ranks 98th in the world. Indonesia borders Malaysia on the island of Borneo (Indonesian: Kalimantan), Papua New Guinea on the island of New Guinea and East Timor on the island of Timor.

The capital is Jakarta, formerly known as Batavia. In addition to the capital city of Jakarta, principal cities of high population include Surabaya, Bandung, Medan, Palembang, and Semarang.

Administrative divisions

Indonesia currently has 33 provinces, of which three have special status and one is a special capital region. The provinces are subdivided into regencies and cities, which are further subdivided into sub-districts.

The provinces are: Nanggroe Aceh Darussalam*, Bali, Bangka-Belitung, Banten, Bengkulu, Gorontalo, West Irian Jaya (*Irian Jaya Barat*), Jakarta*, Jambi, West Java (*Jawa Barat*), Central Java (*Jawa Tengah*), East Java (*Jawa Timur*), West Kalimantan (*Kalimantan Barat*), South Kalimantan (*Kalimantan Selatan*), East Kalimantan (*Kalimantan Timur*), Central Kalimantan (*Kalimantan Tengah*), Riau Islands (*Kepulauan Riau*), Lampung, Maluku, North Maluku (*Maluku Utara*), West Nusa Tenggara (*Nusa Tenggara Barat*), East Nusa Tenggara (*Nusa Tenggara Timur*), Papua*, Riau, West Sulawesi (*Sulawesi Barat*), South Sulawesi (*Sulawesi Selatan*), Central Sulawesi (*Sulawesi Tengah*), South East Sulawesi (*Sulawesi*

Tenggara), North Sulawesi (*Sulawesi Utara*), West Sumatra (*Sumatera Barat*), South Sumatra (*Sumatera Selatan*), North Sumatra (*Sumatera Utara*), Yogyakarta*.

(*) The provinces which have special status.

The special territories have more autonomy from the central government than other provinces, and so have unique legislative privileges: the Acehnese government has the right to create an independent legal system, and instituted a form of *sharia* (Islamic Law) in 2003; Yogyakarta remains a sultanate whose sultan is the territory's de facto governor for life. Papua (formerly called *Irian Jaya*) has had special status since 2001. Though Jakarta is a single city, it is administered much as any other Indonesian province. For example, Jakarta has a governor (instead of a mayor), and is divided into several sub-regions with their own administrative systems.

Climate

Indonesia's climate is definitely tropical. There is no autumn or winter and distinctive "dry" and "wet" seasons share the year. The East Monsoon, from June to September, brings dry weather while the West Monsoon, from December to March is moistureladen, bringing rain. The transitional period between these two seasons is interspersed by the occasional heavy rain shower, but even in the midst of the West Monsson season, temperatures range from 21 degrees (70 F) to 33 degrees celcius (190 F) except at higher altitudes which can be much cooler. Heaviest rainfalls are usually recorded in December and January and humidity is generally between 75% and 100%.

People and culture

Indonesia has a population over 200 million (The country's Central Statistics Bureau and *Statistics Indonesia* quote 222 million as the population for 2006, while the CIA Factbook estimates are over 245 million. Non-governmental and international sources report that

Indonesia's current population is estimated to be over 280 million.) which is the world's fourth most populous country and most populous Muslim-majority nation.

Although the national language is Indonesian (called *Bahasa Indonesia*) and the population is overwhelmingly Muslim, there are several hundred diverse linguistic and ethnic groups across the country, as well as other religious communities. Islam is Indonesia's main religion, with almost 86% of Indonesians declared Muslim according to the 2000 census. The remaining population is 11% Christian (of which roughly two-thirds are Protestant with the remainder mainly Catholic, and a large minority Charismatic), 2% Hindu and 1% Buddhist.

Indonesia's population can be roughly divided into two groups. The west of the country is mostly occupied by Malay people, while the east is more Pacific and people on the island of New Guinea are Papuan, with roots in the islands of Melanesia. Many Indonesians identify with a more specific ethnic group that is often linked to language and regional origins; examples of these are Javanese, Sundanese, or Batak. The total number of ethnic in Indonesia is 300 and the total number of different dialects is 742. Small but significant populations of ethnic Chinese, Indians and Arabs are concentrated mostly in urban areas.

Languages

The official national language, Indonesian is universally taught in schools and is spoken by nearly every Indonesian. It is arguably the greatest national unifying tool for a country made up of hundreds of different ethnic and linguistic groups. It is the language of business, politics, national media, education and academia. However, in isolated areas even on the major islands it is not uncommon to find villagers who are not familiar with Indonesian. Most Indonesians speak at least one of the several hundreds of local languages (*bahasa daerah*) as their first tongue, with Javanese the most widely-spoken being the language of the country's largest ethnic group.

Culture

Indonesia has around 300 ethnic groups each with cultural differences which have shifted over the centuries. Prominent example is the Borobudur temple, which is a mix of Hinduism and Javanese culture, as it was built by a Javanese dynasty, the Sailendra. Indonesia has also imported cultural aspects from Arabic, Chinese, Malay and even European sources. Art forms in Indonesia also have been influenced by several cultures. For example, the famous Javanese and Balinese dances that contain aspects of Hindu culture and mythology. The well known Javanese and Balinese wayang kulit shadow theatre shows also displays several mythological events. Several islands are famous for their batik, ikat and songket clothes.

Indonesian music varies within cities and groups as people who live in the countryside would listen to a different kind of music than people in the city. Native Indonesian music is still preserved. Examples of Indonesian traditional music are Gamelan and Keroncong. A more modern form of Indonesian native music is Dangdut.

The Cuisine

The staple food of most of Indonesia is rice. On some of the islands in eastern Indonesia, staple food traditionally ranged from corn, sago, cassava to sweet potatoes, though this is changing as rice becomes more popular. From the surrounding seas as well as from fresh water fisheries fish is abundant and of great variety, such as lobsters, oysters, prawns and shrimps, squid, crab, etc. Fish features prominently in the diet as fresh, salted, dried, smoked or a paste. Coconut is found everywhere and besides being produced for cooking oil, its milk the juice from the white meat is an ingredient for many dishes.

History

The archipelago of Indonesia, specifically Java, was inhabited by *Homo erectus* approximately 500,000 years ago, while the island of Flores was home to a newly

discovered species of hominid, *Homo floresiensis* until approximately 10,000 years ago. The date of the earliest arrival of *Homo Sapiens* into the area was between 40,000 and 100,000 years ago. The earliest historical mention of the area was of the Jawa Dwipa Hindu kingdom in Java and Sumatra around 200 BC by Indian scholars, and various archeological sites show the influence of the Hindu religion in the area from the first century AD to the fifth century AD.

Under the influences of Hinduism and Buddhism, several kingdoms formed on the islands of Sumatra and Java from the 7th to 14th century. The arrival of Arabs trading in spices later brought Islam, which became the dominant religion in many parts of the archipelago after the collapse of Hindu and Buddhist kingdoms. When the Portuguese came in early 16th century, they found a multitude of small states vulnerable to the Portuguese, and later other Europeans, wanting to dominate the spice trade.

In the 17th century, the Dutch became the most powerful of the European powers in the archipelago, preventing the Spanish from any attempt to settle down from the neighbouring Philippines and ousting the Portuguese from their settlements other than their colony of Portuguese Timor on the island of Timor which remained Portuguese until the 20th century.

The people across many islands rebelled in the early 20th century against Dutch control. There were 3 major rebellions against Dutch occupation:

Java War (1825-1830). The rebels were led by Prince Diponegoro from the kingdom of Mataram, central Java.

Padri War (1821-1837) in West Sumatra. The rebels were led by Tuanku Imam Bonjol.

Aceh War (1873-1903) in Aceh.

After a brief occupation by Imperial Japan during World War II, Sukarno and Mohammad Hatta declared independence unilaterally on August 17, 1945 soon after the Japanese lost

the war. A united and independent Indonesia was recognized in 1949. It was also recognized by the United Nations in 1950.

Indonesia is a unitary state, and for most of its post-independence history, was first governed by Sukarno, leader of the national independence struggle, and then under controversial and authoritarian Suharto. Suharto's administration is commonly called the *New Order* era. Suharto invited major foreign investment, which produced substantial, if uneven, economic growth. During the regime of president Suharto, Indonesia built strong relations with the United States and had difficult relations with the People's Republic of China owing to Indonesia's anti-communist policies and domestic tensions with the Chinese community.

However, Suharto enriched himself and his family through widespread corruption and was forced to step down amid massive popular demonstrations and a faltering economy by the Indonesian Revolution of 1998. Democracy was restored following the revolution of 1998. From 1998 to 2005, the country had four presidents: Bacharuddin Jusuf (BJ) Habibie (1998 to 1999), Abdurrahman Wahid (1999 to 2001), Megawati Sukarnoputri (2001 to 2004) and Susilo Bambang Yudhoyono (2004 to Current). On May 21, 1998, President Suharto announced his resignation and ask Indonesian Vice President DR BJ Habibie to become the new Indonesian President. President Habibie was born in Makassar, Sulawesi and become the first Indonesian President from outside Java.

Economy

Major agricultural products of Indonesia include palm oil, rice, tea, coffee, spices and rubber. Some big industries in Indonesia are petroleum and natural gas, textiles, apparel and mining. In 2005, the industrial production growth rate was 4.8%, made Indonesia on the 73th place on the world rank. Indonesia's major trading partners are Japan, the United States, Singapore, Malaysia and Australia.

The country has extensive natural resources outside Java, including crude oil, natural gas, tin, copper and gold. Indonesia is the world's largest LNG producer, exporting about 20% of the world's total volume in 2002. Apparently, in 2005, the income from exports was larger than the import's expenditure with \$83.64 billion and \$62.02 billion respectively. Indonesia's imports commodities include machinery and equipment, chemicals, fuels, foodstuffs.

Despite being the only East Asian member of OPEC, Indonesia's fuel production has declined significantly over the years, owing to aging oil fields and lack of investment in new equipment. Indonesia is now a net importer of oil and had previously subsidized fuel prices to keep prices low, costing US\$ 7 billion in 2004. The current president has mandated a significant reduction of government subsidy of fuel prices in several stages. In order to alleviate economic hardships, the government has offered one-time subsidies to qualified citizens. The government has stated to reduce subsidies, aiming to reduce the budget deficit to 1% of gross domestic product (GDP) this year, down from around 1.7% last year. The real Gross Domestic Product (GDP) of Indonesia is projected to reach 5.2% in the second half year of 2006.

Indonesia has received many aids in economic sector, which are varies in bilateral, multilateral and non-governmental organization (NGO). In addition to this, although Indonesia finished its IMF program in December 2003, the country still receives bilateral aid through the Consultative Group on Indonesia (CGI) which reached \$2.8 billion for 2004 and 2005. Another aid was intended for the post-Tsunami reconstruction in Aceh through the NGO and reached \$5 billion. The total of aid for Indonesia is \$43 billion.

Tourism Information

Information from the Ministry of Culture and Tourism, Republic of Indonesia shows the visitor arrivals statistics which based on the collection and processing of visitor embarkation and disembarkation cards from the Directorate General of Immigration:

Table 2: Visitor Arrivals Statistics

YEAR	INTERNATIONAL VISITORS	AVERAGE EXPENDITURE/PERSON (US \$)		AVG. STAY IN DAY(S)	FOREIGN EXCHANGE INCOME
		PER VISIT	PER DAY		
2000	5.064.217	1.135,18	92,59	12,26	5.748,80
2001	5.153.620	1.053,36	100,42	10,49	5.396,26
2002	5.033.400	893,26	91,29	9,79	4.305,56
2003	4.467.021	903,74	93,27	9,69	4.037,02
2004	5.321.165	901,66	95,17	9,47	4.797,88
2005	5.002.101	904.00	99,86	9,05	4.521,89

Source: the Tourism Statistics Division of the Statistics-Indonesia (BPS).

There are more than 80 ports of entry into Indonesia covering the whole area of the country, of which 56 are seaports. The eleven main ports are Soekarno-Hatta (Jakarta), Ngurah Rai (Bali), Polonia (Medan), Sekupang (Batam Island), Juanda (Surabaya), Sam Ratulangi (Manado), Entikong (Pontianak), Tabing (Padang), Adi Sumarmo (Solo), Selaparang (Mataram), and Hasanuddin (Makasar).

Since 2000, there have been, on average, 5 million foreign tourists each year, who spend an average of US\$ 100 per day (see table). With an average visit duration of 9-12 days, Indonesia gains US\$ 4.6 billion of foreign exchange income annually. This makes tourism Indonesia's third most important non-oil/gas source of foreign revenue, after timber and textile products (CIA, 2006).

Visitor arrivals to Indonesia in 2004 increased by 19.12% compared to that in 2003, from 4,467,021 in 2003 to 5,321,165 in 2004. It showed that the Indonesian tourism has been recovered after experienced a high decreases. Moreover, it showed that some events that happened in 2004 such as, the policy implementation of Visa On Arrival for some countries,

the President election and bomb tragedy in Kuningan, Jakarta, did not give much impact to visitors arrival to Indonesia.

Three quarters of Indonesia's visitors come from the Asia Pacific region, with Singapore, Malaysia, Australia, Japan and South Korea among the top five markets. The United Kingdom, France, Germany and the Netherlands are the largest sources of European visitors. The major markets for 2004 were among other Singapore which represented 30.91% to the total, Malaysia 11.70%, Japan 11.57%, Australia 7.63%, Taiwan 7.22%, South Korea 4.30%, USA 2.88%, Germany 2.53%, United Kingdom 2.13% and Netherlands 1.73%. They made up a total of 82.60%. Compared to the previous year, there was an increase of 0.48% . ASEAN is still remained the biggest contribution of visitors which recorded 45.69% to total arrivals.

Visitors arrival for holiday shared the biggest number which accounting for 2,827,235 or 53.15% to the total arrival, while visitors who came for business placed the second ones that reached 40.09%. There was a small change of visitor composition by purpose of visit compared to that in 2003.

Total revenue from tourism in 2004 recorded as much as US\$ 4,797.88 million or increase by 18.85% over 2003. The biggest share were contributed by visitors from Singapore at 13.46% to total revenue. While revenue from Japans which was recorded 12.25% to total was the second biggest contribution. Visitor expenditure per visit had reached US\$ 901.66 or experienced a decrease by 0.23% over 2003. While the average expenditure per visitor per day was US\$ 95.21 or increase by 2.07% over 2003.

Over the 5 years up to 2006, attention has been focused on generating more domestic tourism. Competition amongst budget airlines has increased the number of domestic air travellers throughout the country. Recently, the Ministry of Labour legislated to create long weekends by combining public holidays that fall close to weekends, except in the case of

important religious holidays. During these long weekends, most hotels in popular destinations are fully booked.

METHODOLOGY

This descriptive study focuses on exploring image positioning of Indonesia's tourism. Issues concerning image positioning in this study are: the overall situation analysis (SWOT), theme(s) of tourism that match the country's resources, and fifteen main attractions of the country.

Instrument

In the first phase, the SWOT analysis of the country was explored by using secondary data as a core. This research also employed the content analysis of travel stories available to the public on the internet to gain initial image of the country. There are advantages of this method as its low cost, unobtrusiveness and as a consequence reduce bias (Dann, 1981; Mann & Stewart, 2000). It is possible to see online travelogues as a new unobtrusive data source because the writers of the travelogues have freely chosen what to write, what not to write, how to express themselves and how much to write (Yagi, 2001). This method allows the writers to discuss what they wanted to mentioned so it is possible that themes mentioned have some importance and personal significance. Tourism is one of the areas that has received considerable advantages from the internet, not commercially, but also as a tool for providing and gathering travel information (Williams, Bascombe, Brenner & Green, 1996) Therefore, this online travelogues are becoming very popular for presenting one's travel experience to a mass audience (Yagi, 2001).

Moreover, the travel agents in Thailand who operate tour to Indonesia were interview for cross checking with the secondary data. Based on the aims of the study, the questions used in the interview process consisting issues as follow:

- What would you say if you have to recommend people who would like to visit the country?
- What are SWOT about tourism in Indonesia from your opinion?

- What are the most prominent attractions in Indonesia that the visitors should not miss from your experiences?
- Other recommendations for the tourism development of the country.

In the second phrase, the SWOT analysis of the country, images and themes of tourism were explored by using focus group method. The researcher invited key informants from different related sectors to meet in Indonesia and ask them for agreement and inputs about SWOT, images, themes and main attractions in Indonesia. Also, field study was implemented to find comments from visitors who were visiting the country.

Data Collection

There were two phrases of data collections. In the first phrase secondary data collection and interview were implemented to initially analyze SWOT and image of tourism in Indonesia. The secondary data were searched from:

- 1) Websites: the 30 top websites of tourism in Indonesia were reviewed these websites were retrieved from the keyword "tourism Indonesia," then the websites shown in order from the first to the thirtieth were chosen;
- 2) Articles, books, and magazines that written about tourism in Indonesia;
- 3) Travelogue which is a travel stories available to general public. Its advantages are low cost and unobtrusiveness and a consequent reduced bias (Dann, 1999; Mann & Stewart, 2000). Also, the writers have freely chosen what to write and what not to write. It is possible to suggest that themes mentioned have some importance and personal significance (Yagi,2001).

The travel agents chosen to interview about situation of tourism and image of Indonesia were from the list of Association of Thai Travel Agents (ATTA) of the year 2005. This was to crosscheck with the secondary data analysis. Those travel agents consider

themselves as specialize for tourism in Indonesia. There were 4 travel agents involved in this interview process.

In the second phrase, the researcher contacted key professionals from different sectors of tourism such as government sector (Ministry of Tourism) and business or private sectors (restaurants, travel agents, NGO, hotels) to implement the focus group in Indonesia. There were a total of 25 key participants involved in the focus group. The discussion was:

- to gain their agreement and input about SWOT analysis from the first phrase of research;
- to discuss and finalize the image of tourism in Indonesia and also tourism themes that suite the country's resources; and
- to receive their input about the main 15 attractions that represent tourism in Indonesia

The focus group discussion period was four hours and successfully met the aims of the focus group meeting. In this phrase, the interview of the visitors on the field study was also implemented to crosscheck the overview data received. As the limitation of time, 10 visitors were chosen based on convenient sample.

RESULTS OF THE STUDY

The results of the analysis are reported in sequence of SWOT analysis, Indonesia's images and themes of tourism, fifteen attractions which represent the country, and discussion of the networking process.

SWOT analysis of Indonesia

The results of SWOT analysis of tourism situation in Indonesia derived from the first phrase and the second phrase of the study. The researcher reviewed secondary data and interviewed travel agents in Thailand then categorized the analysis into strengths, weaknesses, opportunities, and threats of tourism situation in Indonesia. In the second phrase, the agreement was made from the key informants before this final reported (Table 3).

TABLE 3: SWOT ANALYSIS OF TOURISM IN INDONESIA

Strengths
Attractions
Indonesia has a large system of national parks considering the size of the country. Tourism is a key incentive for local people to help protect the national parks. There are 39 national parks. Guung Gede Pangrango National Park and Mjung Kulon National Park were first protected area established in 1978 in Indonesia.
The country is rich in natural resources such as forests, marine, lakes, volcanoes, and scenery.
Indonesia consists of a multitude of 17,000 islands, of which 6,000 are inhabited, extends across the three time zones, form Sumatra in the west to Papua in the east, and offers a great variety of scenery , from the rice paddies of Java and the rainforests of Kalimantan (Borneo) to the snow-capped mountains of New Guinea.

Indonesia has more than **400 ethnic groups** and more than **500 dialects**, each with **cultural differences** which have shifted over the centuries. Prominent example is the Borobudur temple, which is a mix of Buddhism and Javanese culture, as it was built by a Javanese dynasty, the Sailendra. Indonesia has also imported cultural aspects from Arabic, Chinese, Malay and even European sources.

Art forms in Indonesia were developed in the courts of former kingdoms such as in Bali, where they are part of religious ceremonies. Art forms in Indonesia also have been influenced by several cultures. The famous dance dramas of Java and Bali are derived from Hindu mythology and often feature fragments from the Ramayana and Mahabharata Hindu epics.

The "**Wayang kulit**" (leather puppets) of Java is performed with leather puppets held by the puppeteer, who narates the story of one of the famous episodes of the Hindu epics, the Mahabharata or the Ramayana. It is performed against a white screen while a lantern in the background casts the shadows of the characters on the screen, visible from the other side where the spectators are seated.

The "**Wayang Golek**" (wooden puppets) of West Java is based on the same concept.

The **batik** process of waxing and dyeing originated in Java centuries ago and classic designs have been modified with modern trends in both pattern and technology. There are several centres of Batik in Java, the major ones being Yogyakarta, Surakarta, Pekalongan and Cirebon. Batik is also being produced in some other areas as in Bali where local designs are incorporated.

Pencak Silat is a **unique martial art** originating from the archipelago. This can be developed in the future.

Indonesian **music** varies within cities and groups as people who live in the countryside would listen to a different kind of music than people in the city. Highly stylized in

movement and costume, dances and the "*wayang*" drama are accompanied by a full "gamelan" orchestra comprising xylophones, drums, gongs, and in some cases string instruments and flutes. Bamboo xylophones are used in North Sulawesi and the bamboo "angklung" instruments of West Java are well-known for their unique tinkling notes which can be adapted to any melody.

Indonesia is **rich in history**. The Indonesian archipelago, specifically Java, was inhabited by *Homo erectus* -- the Java Man -- about 500,000 years ago, while the island of Flores was home to what, as of 2006, may be a newly discovered species of hominid, *Homo floresiensis*.

Tourism resources of prominent islands / cities are:

Java: dominated by a chain of high volcanic mountains such as Mount Bromo in the east of the island and Merapi Mountain in the central and Gede Pangrango in west Java that are still active. The island's fertility has supported a number of advanced civilizations. The most spectacular examples of the heritage are the temple at Borobodur, which is world largest Buddhist edifice, and the lesser-known Hindu temple at Prambanan nearby.

The palaces of former sultans at Solo and Yogyakarta also attract growing numbers of cultural tourists. Jakarta is the primary gateway and business centre, shopping, and also offer the historic port area, Batavia. Jakarta retains much from the colonial Dutch and British periods.

Sumatera: Sumatera is the second-largest island in Indonesia, straddling the Equator, with a volcanic mountain range, hot springs, unexplored jungle and vast plantations. Tourism resources here include the mountain scenery around lake Toba, world's largest craters; the remaining rainforests ; and the distinctive folklore of the Minangkabau people.

Bali: known as 'tropical paradise' where artistic people live in harmony with their environment. The tourism resources include a spectacular landscape. The opening in 1986 of international airport at Denpasar was the catalyst for the large-scale expansion of tourism. Bali is famous for its woodcarving and sculptures; silver and gold jewelry, woven cloth, sarongs, traditional and realist paintings, bone and coconut shell carvings, antiques, basket wares and masks.

Lombok: has been the main beneficiary of government policy to separate tourism away from Bali. The two islands are same size but Lombok is less developed version of Bali. It has drier climate and a Muslim culture. The authorities have set out to attract upmarket tourists with luxury hotels and the associated infrastructure including a new international airport and improvements to ferry services, port facilities and road network.

Lesser Sunba Island: It is to the east of Lombok and remain undeveloped, but increasingly feature on the backpacker's trail, closely followed by divers and surfers. Ecotourism has potential for growth in some of the islands such as Komodo.

Sulawesi: offers world- class diving. The Bunaken National Park is an outstanding example of marine conservation. In the mountainous interior the Toraja villages with their unique architecture and ceremonies based on ancestor worship provide the main attraction for tourists.

Several **national tourist events** have been held throughout Indonesia. The events are such as Toba Lake Festival in North Sumatra; The Indonesian Archipelago Palace Festival in West Java; Borobudur Festival in Central Java; Bromo Festival in East Java; The Bali Art Festival in East Timor; The Bidar Kapuas Festival in West Kalimantan; Sea Park Festival in Maluku; and the Lembah Baliem Arts and Culture Festival in Papua, Bunaken Festival in North Sulawesi, and many other areas. There is the event of Tourism Indonesia Mart Expo (TIME) every year and this year (2007) will be held in Bali.

People/ Ways of life
Indonesia is rich in art and culture which are intertwined with religion and age-old traditions from the time of early migrants with Western thoughts brought by Portuguese traders and Dutch colonists. Though the legal system is based on the old Dutch penal code, social life as well as the rites of passage are founded on customary or "adat" law which differs from area to area. "Adat" law has a binding impact on Indonesian life and it may be concluded that this law has been instrumental in maintaining equal rights for women in the community.
Community benefit
Community-based tourism in Indonesia is considered to be an innovative mechanism as the overall picture. Indonesia has some tourism sites as example for good practices inventory cases identified by APEIS (2006). - Community-based tourism at Gunung Gede Pangrango National Park - Building a unique partnership among major stakeholders to promote responsible tourism in Gunung Rinjani National Park - Community-based tourism in Gunung Halimun National Park - Ecotourism as a tool for switching communities from destructive to non-destructive activities, Tangkahan, Gunung Leuser National Park - Local community initiative in developing culture and nature tourism in Bromo Tengger Semeru National Park - Rural Tourism in Desa Wirun - Penglipuran in Bangli, Bali and Pemuteran coral gardening in Bali
Tourism can bring supplementary income to the local communities.
Informal economic activities are of considerable importance in many tourism destinations. Characteristics of the informal sector generally include lack of legal recognition and registration, evasion of taxes, ease of entry, reliance on indigenous resources, family ownership, small scale of operation, labour intensiveness, skills acquired outside formal education systems, part-time labour, locally-based ventures,

and unregulated and competitive markets. This is considered strength because everyone can increase their income from tourism (in other words, pro-poor tourism).
Government Support
Tourism is gaining a more important sector as a foreign exchange earner. To production and growth in the industry, the government has formulated new policies and improved facilities. Significant progress has been made in communications and transportation and since 1976, Indonesia has had its own communications satellite system which has enabled rapid expansion of telephone, television and broadcast facilities to all 33 provinces. Air and sea ports are being extended to cater to the growing traffic on both domestic and international sectors, of passengers as well as freight.
Tourism continues to be a priority for the new democratic government, with the restructured Ministry of Culture and Tourism developing the market for conferences, exhibitions and incentive travel.
In fiscal year 1997/98, the Main National Tourism Development Plan (RIPP) was completed.
In the present Indonesian government, the promotion and development of tourism was focused primarily on the role of tourism as a foreign exchange earner and strengthen domestic tourists.
Having been criticised, in the past, for the destruction of large areas of its rainforest through forest exploitation, the Indonesian government is now keen to encourage an environmentally friendly tourism policy.
Tourism in Indonesia is being developed through two main programs , covering tourism marketing and tourism products and destination development.

Group tourist awareness (Pokdarwis) has been established as moving spirit for tourist development such as the improvement of tourist attractions to socialize the Seven Charms Program (Sapta Pesona) consisting of safety, cleanliness, orderliness, comfort, beauty, hospitality, and enchanting memories. Until 1997/98, there were 921 Pokdarwis throughout Indonesia, or an increase of 71.5% since 1993/94. To encourage domestic tourism, in 1997/98 the Government started to develop tours for senior citizens.

The **Tourist Awareness Campaign** every year adopted different themes in accordance with the national development rhythm and dynamics. In 1997, the theme was The Year of Cooperatives and Telecommunication and in 1998 the theme was: The Year of Art and Culture. However, the new themes should also be developed.

Information and Promotion

The Ministry of Culture and Tourism of Indonesia participated in JATA World Travel Fair 2006, held in the Bigsight Building, Tokyo last September 21- 23, 2006. During the event, a press conference was staged participated by the ministry, Indonesian Embassy in Tokyo, Jakarta Tourism Office, Bali Tourism Office, Yogyakarta Tourism Authority, and Garuda Indonesia. Following the press conference, a dinner with Indonesian art performance was presented to all audiences from Japan travel bureaus, journalists, and other prominent guests.

Tourism Indonesia Mart & Expo (TIME) 2006 was officially closed on September 22, 2006 in Makassar, South Sulawesi. The total transaction made was estimated to reach US\$ 15 million. The biggest Indonesian mart in global scale was participated by 110 buyers from 21 nations and 124 sellers from 20 provinces in Indonesia, occupying around 105 booths at the exhibition, according to a release from the TIME 2006 organizer.

Indonesia has participated in several important tourism promotional events abroad.

Indonesia also promote convention tourism. There were 34 companies operating in the convention services business, including the Jakarta Convention Center, Jakarta International Trade Center and Bali International Convention Center.

Infrastructure/ Facilities

Indonesia has a good internal air system linking most of the larger cities to Jakarta.

PELNI, the state-owned shipping company, has six modern ferries serving all the main ports across the archipelago.

There are nearly 7000km (4350 miles) of track on Sumatra, Madura and Java. An extensive rail network runs throughout Java.

Traffic drives on the left. There are over 378,000km (234,360 miles) of roads in the country, of which about 28,500km (17,670 miles) are main or national roads and 200km (125 miles) are motorway. Nearly half of the network is paved. There are good road communications within Java and to a lesser extent on Bali and Sumatra. The other islands have poor road systems, although conditions are improving with tourism becoming more important.

International hotels are found only in all 33 provinces. Several of these have business centres with a variety of services. However, hotels of all grades from deluxe to standard can be found in most cities around the country.

Activities
The Indonesian archipelago is one of the world's top surfing destinations. The best time to surf is from April to September. (Sumatra, Java, Bali, Lombok, Sumbawa, Flores and Sumba)
There are approximately 80,000km (50,000 miles) of coastline, reputed to contain 15 per cent of the world's coral reefs. Therefore Indonesia is famous for diving activity. (Java island, Sanggihe-Talaud and Togian, Gili islands, the Sumatra and Riau islands)
Other activities are: climbing, caving, sailing, volcano trekking. Jungle trekking
Existing market
Visitors arriving by air in 2004 made up 52.43% to the total while those arriving by sea recorded to 47.15% and land 0.41%. Comparing to year before there was a change in structure, where in 2003 the proportion of visitors arrived by air was lower than that by sea. Arrival by air predominated by visitors from Asia (excluding ASEAN) 39.08%, of which were from Japan 17.28%, followed by Taiwan 10.42%. Whereas visitors from ASEAN, Europe and Oceania were amounted about 21.75%, 20.04% and 12.70% respectively. Unlike arrival by air, visitor arrival by sea mostly come from ASEAN that was 72,12%. Among other were from Singapore 53.54% and Malaysia 15.70%. In 2006, ASEAN visitors were 43%, Japan 11 %, and Taiwan 10%. Similarly, visitor arrival by land which was accounting for 0.41%, was predominated by ASEAN visitors (67.53%).
The top five buyers in the Tourism Indonesia Mart & Expo (TIME) 2006 were: Netherlands, China, Korea, Malaysia, and Indonesia. The sellers were comprised by Hotel and Resorts (43%), Tour Operators/ Travel Agencies (29%), NTOs (20%) and others (8%). TIME 2006 was widely considered as a success, admitted by most sellers, buyers, and international media.

Weaknesses
Lack of good governance/ management
Need innovative system for tourism management to induce good governance
Need to have promotion office because there is no promotion office at the moment.
Insufficient budget for tourism management
Insufficient data and research to support sound tourism and protected area management although more have been done but not implemented.
Local people have few benefits except in some places such as Bali. - Poverty of local communities - No cooperation in natural resources/biodiversity conservation - Few communities involved in tourism management and/or decision-making - Conflict of interests
Threats from tourism development/activities in protected area - Increased visitors effect on the environment - Lack of CBT policy and/or policy implementation - Lack of law enforcement/visitor management - Low visitor awareness of tourism effects.
Government policies towards the local tourism sector vary widely, and there is no consensus regarding the ways in which tourism should be developed and the major objectives that this development should pursue. Where state-bureaucracies expect tourism to contribute significantly to national development, tourism policy is directed towards large-scale investments in co-operation with transnational enterprises and project developers that inhibit the participation of local people. The result is that profits remain beyond the reach of local communities, while their residents are often denied access to resources, such as beaches, which they previously enjoyed.

Tourism dependency
Economic implications of tourism development that are frequently mentioned concern the acceleration of inflation because of increasing tourist expenditure, the displacement of labour and increasing dependence on the industry, the loss of the best agricultural land to tourism, and the reduced access to reefs and shorelines for fishing.
Leakage from tourism
Much has been written about the economic costs of tourism development: the leakage of foreign exchange because of the necessity to purchase foodstuffs, capital goods, and other items to support the tourism industry, and the repatriation of profits when multinational firms are involved.
Opportunities
International support
The IUCN has declared the general purposes of protected area declaration to protect and maintain biological diversity and natural and cultural resources. This support the protected area system in Indonesia.
Indonesia is a founding member of the Association of South East Asian Nations, and thereby a member of both ASEAN+3 and the East Asia Summit. Since the 1980s, Indonesia has worked to develop close political and economic ties between South East Asian nations, and is also influential in the Organization of Islamic Conference.
In facing the globalization era and to improve the regional and sub-regional economic endurance, a closer cooperation program in the tourism sector has also been implemented with several ASEAN countries, such as the Indonesia, Malaysia, Singapore - Growth triangle (IMS-GI), Indonesia, Malaysia, Thailand, Growth-triangle (IMT-GT) and Brunei, Indonesia, Malaysia, the Philippines East ASEAN Growth Area (BIMP-EAGA) on marketing and promotion of tourist package programs, promoting tourist marketing between the member countries, accommodating and mobilizing private investment in the field of tourism. Also, there is the cooperating program of ASEAN-Australia and economic ASEAN community in Cebu Declaration, Philippines.

Freedom and expansion of communication
Media freedom in Indonesia increased considerably after the end of President Suharto's rule, during which the now-defunct Ministry of Information monitored and controlled domestic media and restricted foreign media. The TV market includes 10 national commercial networks, which compete with public TVRI. Some provinces also operate their own stations. Private radio stations carry their own news bulletins and foreign broadcasters can supply programmes. The radio dial is crowded, with scores of stations on the air in Jakarta alone. Internet use is increasing <i>Bisnis Indonesia</i> reported in 2004 that there were 10 million users.
Emerging of new markets
The emerging new market is in ASEAN countries such as China, India Korea, and also in other parts such as Middle East, Eastern Europe, and South Africa.
Threats
Natural disaster
Threats to natural resources, biodiversity and environment - Protected area encroachment - Illegal logging and hunting - Development pressure in protected areas (expanding industry, community settlement, visitor facilities) - Low local awareness of natural resource conservation.
A massive earthquake and tsunami on 26 December 2004 devastated parts of northern Sumatra, particularly Aceh. On March 2005, a powerful earthquake destroyed most buildings on Nias Island, west of Sumatra. Under the agreement. On the morning of Saturday, May 27, 2006, the city of Yogyakarta was struck by a severe earthquake. More than 6,000 people are currently estimated to have died.
Indonesia still has potential of natural disaster (Tsunami).

Terrorism

After the 2002 Bali bombing, terrorist activities have become increasingly significant in Indonesia. The bombing, in which 202 people, including 164 international tourists died, destroyed two nightclubs in Kuta, Bali. By looking at the number of international tourist deaths, the terrorist activity has been taken very seriously not only by the Indonesian government, but also international world, including Australia, The United States and The United Kingdom. Since 2001, the government of Indonesia has co-operated with the U.S. in cracking down on Islamic fundamentalism and terrorist groups. Over the next four years there were several other terrorist attacks including the 2003 Marriott Hotel bombing, 2004 Jakarta embassy bombing and 2005 Bali bombing. As a result, a number of countries have issued travel warnings for international tourists and workers.

Indonesia during the 1980s and 1990s experienced a very high rate of tourism growth. However, terrorist incidents – ‘Black October’, the bombing of a nightclub in the Balinese resort of Kuta in 2002 and the attack on an international hotel in Jakarta in 2003. Bali alone subsequently experienced a 75 per cent fall in tourist arrivals. This blighted the island’s economy that had become dependent on tourism. Matters were made worse by the reaction of various Western governments advising against travel to Indonesia, in contrast to the policy of encouraging tourism to the USA after 9/11.

There are several warnings through international media about different areas of Indonesia :

Aceh: The waters 12 nautical miles around Aceh are closed to all foreign shipping. Under Indonesian law tourists are banned from entering Aceh and the activities of all other foreigners including journalists and aid workers are regulated.

Maluku: There was strongly advise not to travel to Maluku province (particularly Ambon) due to the unsettled security situation, including the risk of bomb attack.

Papua: Political tensions associated with anti-government groups in Papua and inter-ethnic tensions may lead to violence. Sulawesi: There is violence associated with inter-ethnic tensions. West Timor: The security situation in West Timor remains unsettled, particularly in areas near the border with East Timor, where security incidents continue to occur and have the potential to inflame local tensions.
Economic downfall
Since the late 1997, Indonesia's economy suffered a drastic downturn followed by an at times patchy and slow recovery. This was due not only to the financial crisis that struck much of east Asia at the time, but also, due to corruption at all levels and a perceived slow pace of economic reform. The Asian financial crisis of 1997-1998 affected Indonesia more severely than others in the region, with the result that the majority of the population live below the poverty line.
Health issue
Now there have been human cases of avian influenza in Indonesia. Other health concern in Indonesia include polio, dengue fever, and smoke haze.

RESULT OF IMAGES AND TOURISM THEMES

The prominent images and themes of the country were received from the review of secondary data and then were approved by the key informants from the focus group meeting in the second phrase of the research. The results were as follow:

Prominent images of Indonesia (coded from tourism website, travelogue, and interview)

- For a long time the image of Indonesia as a tourist destination has been associated with the **island of Bali**, that has gained a reputation as a superior sun, sand, surf, and sea area.
- The symbol of 'Bali' has come to stand for almost anything tropical, exotic, and leisurely and **the use of 'Bali' as a brand name** continues to flourish.
- **Bali's** natural attractions include miles of sandy beaches (many are well-known amongst surfers), picturesque rice terraces, towering active volcanoes over 3,000 meters (10,000 ft.) high, fast flowing rivers, deep ravines, pristine crater lakes, sacred caves, and lush tropical forests full of exotic wildlife.
The island's rich cultural heritage is visible everywhere - in over 20,000 temples and palaces, in many colorful festivals and ceremonies (including tooth filings and cremations), in drama, music, and dance.
- The **floating emerald islands of the Indonesian archipelago** have for centuries lured everyone from missionaries to pirates, mining companies and backpackers to their sandalwood and spice breezes, their Bali Hai lifestyle and their magnificent beaches, mountains and volcanoes.
- Variety is the spice life and nowhere is this more true than in Indonesia. No two places are alike in unspoiled beauty, art, culture and people. The towering mountains and primitive cultures of Irian Jaya contrast sharply with the terraced hills, and highly sophisticated societies of Bali and Java and the animistic beliefs which still have a major influence on the way of life in South Sulawesi. **"Unity in Diversity"**,

which is the country's motto, accurately describe these diverse cultures and extraordinary people brought together to create one nation with one national language, Bahasa Indonesia. For the traveler, Indonesia offers a fine blend of scenic beauty, fauna and flora, culture, marine parks and a wide collection of modern accommodation.

- The **staple food** of most of Indonesia is rice. On some of the islands in eastern Indonesia, staple food traditionally ranged from corn, sago, cassava to sweet potatoes, though this is changing as rice becomes more popular. Fish features prominently in the diet: fresh, salted, dried, smoked and paste. Fish is abundant and of great variety: lobster, oyster, prawns, shrimp, squid, crab, etc. Coconut is found everywhere and besides being processed for cooking oil, its milk and meat is an ingredient for many dishes.

Spices and hot chili peppers are the essence of most cooking, and in some areas they are used generously such as in West Sumatra and North Sulawesi.

- From the wilderness of Sumatra; the steaming volcanoes of Java; the temples and beaches of Bali home of the Komodo Dragon, and the serenity of the less-developed island of Lombok, Indonesia offers **a rich diversity of landscape, cultures, tradition and religion**. And there's plenty of wide toothy smiles to greet visitor.
- For **sheer size, scale and variety** Indonesia, as a holiday or vacation destination, is pretty much unbeatable. The country is so enormous that nobody is really sure quite how big it is; there are between 13,000 and 17,000 islands. Its certainly the largest archipelago in the world, spreading over 5200km between the Asian mainland and Australia, all of it within the tropics and with huge areas of ocean separating the landmasses.

- Not surprisingly, **Indonesias ethnic, cultural and linguistic diversity** is correspondingly great – the best estimate is of 500 languages and dialects spoken by around 200 million people.
The largely volcanic nature of the islands has created tall cloud-swept mountains swathed in the green of rice terraces or rainforest, dropping to blindingly bright beaches and vivid blue seas, the **backdrop for Southeast Asia** is biggest wilderness areas and wildlife sanctuaries.
- The **ethnic mix** of Indonesia is overwhelming: this is the worlds largest Muslim country, but with a distinct local flavour, and there are also substantial populations of Christians, Hindus and animists, whose forms of worship, customs and lifestyles have been influencing each other for centuries.
- As Indonesia encompasses such a **diversity of cultures**.
- Many travellers on holiday hurtle through the southern half of **Sumatra** in their headlong rush to **Java**, probably bypassing the exhaustingly overpopulated capital **Jakarta**, but perhaps pausing at the relaxed beach resort of Pangandaran in **West Java**. Travel to the ancient capital of **Yogyakarta**, a cultural centre which hosts daily performances of traditional dance and music and offers batik courses for curious travellers. Yogya also makes a good base for exploring the huge Borobodur (Buddhist) and Prambanan (Hindu) temples. Javas biggest natural attractions are its volcanoes: the Dieng plateau, with its coloured lakes and ancient Hindu temples and, most famously, Gunung Bromo, where those on vacation brave a sunrise climb to the summit.
- With a wealth of culture, natural beauty and marine sporting facilities, **Indonesia has all the potential** to become one of the region's top tourist destinations.

- Unofficially known as '**Orchid Island**', **Sulawesi** is a land of high mountains, misty valleys and lakes. In the south is Bantimurung Nature Reserve which has thousands of exotic butterflies. The island has geysers and hot springs.
- For both biological and historical reasons, Sulawesi can be viewed as **the Galapagos of Asia** as it sits astride the Wallace Line, the convergence zone of the Australasian and Asian geological plates, and has a variety of endemic and endangered species.
- The landscape of **Bali**, '**Island of the Gods**', is made up of volcanic mountains, lakes and rivers, terraced ricefields, giant banyans and palm groves and, on the coast, bays ringed with white sandy beaches.
- The 1 October 2005 Bali bombings and bomb attack outside the Australian Embassy in Jakarta in September 2004 underscore that the **terrorist threat** to Australians in Indonesia is real. Further terrorist attacks, including in Bali, cannot be ruled out.
- If you do decide to travel to Indonesia, including Bali, you should exercise extreme caution. Terrorist attacks could occur at any time, anywhere in Indonesia. We continue to receive reports that **terrorists** are in the advanced stages of planning attacks against Western interests in Indonesia against a range of targets, including places frequented by foreigners. Recent new information suggests that terrorists may be planning attacks to occur before the end of 2005.

Themes presented (coded from tourism website, travelogue, and interview)

- Indonesia has recently been adding value to its existing tourism product by diversifying into '**environmental**' and '**heritage**' tourism. An example is the agritourism project in Central Java.
- The Indonesian policy of 'regionalization' aims at developing and promoting other areas in Indonesia as tourist destinations through the establishment of regional Tourism Development Corporations. The Indonesian government has been favourably inclined towards **cultural tourism** in particular.
- The possibilities for **ecotourism** are indicated by the 'Wallace Line', which separates islands with Asian flora and fauna from those having species typical of Australia.
- **Ecotourism** in Indonesia: the growing trend for back-to-nature holidays means that numerous types of eco-tours are available. In the Tukangbesi archipelago near Sulawesi, tourists have the opportunity to participate in coral reef preservation projects by helping to collect scientific data.
- There is a great **diversity of cultures** which is both a strength from viewpoint of tourism and a challenge to the process of nation-building.
- **Agritourism** is receiving increased recognition in rural development strategies as part of a wider trend of expanding rural tourism and community development.

Table 4: Topics presented from the review of websites

URL	Topics presented
http://www.alliance-indonesia.com/	Mainly information about Bali Booking service Destination beyond Bali: Sumatera, Mentawai Island, Yogyakarta, Sulawesi, Lombok, Sumbawa, Flores, Borneo, and Irian Jaya (Papua)
http://www.yogyas.com/	Mainly information about Yogyakarta - Calendar of events - Tour destinations - Cultural shows - Alternative tourism - Accommodations and restaurants - Transportation - Tour Packages
http://www.asiatour.com/indonesia/e-01land/ei-lan01.htm	Information about Indonesia - Geography - Climate - People - Religion - History - Natural resources - Economy - Arts and culture

	- Language - Cuisine - Transportation - Travel information - Destinations : Jakarta, Bali, Java, Sumatra, Sulawesi, Kalimantan, Nusa Tenggara, Maluku, Irianjaya
http://www.indonesia-tourism.com/	General information - history - culture - language - natural resources - climate - religion - cuisine - arts and dance - economy - monument - mining - social welfare - lifehood - media - useful links Information of every provinces linked through the map: local interest, history, accommodation, restaurants, arts.

https://www.cia.gov/cia/publications/factbook/print/id.html	Facts about Indonesia - general information - geography - people - economy - government - communication - transportation - Military - Transnational issues
http://www.indonesianembassy-china.com/Index.htm	Information about Indonesia in details search through A-Z Consular services Social and Culture Trade Map
http://www.budpar.go.id/page.php?ic=621	General information Statistic Transportation Travel agents Accommodations Cuisine Culture and tourist attraction Map
http://en.wikipedia.org/wiki/Indonesia	History Politics Provinces

	Geography Economy Demographics Culture Other miscellaneous topics
http://www.responsibletravel.com	Tours in Indonesia categorized by: -adventure -beach -budget travel -culture -ecotourism -family holidays -honeymoon -luxury travel -overland tours safaris -short vacation -special interest -volunteer travel
http://www.infohub.com/	Offering several types of tours in Indonesia and links : -volunteer tour -study tour -Ecotourism -honeymoon -holiday tours -adventure -culture -history and archeology

http://www.swagatam.com/indonesia-tourism.html	Information about Indonesia tourism -when to visit -attractions : Bali, Lombok, Sumatra, Java, Flores, Irian Java, Kalimantan -travel information -tour packages
http://www.nuansabalitour.com/buy/bali/tour/italy/bali_tour.htm	Information about Bali and tour packages/ booking
http://www.alliance-indonesia.com/cruise/ombakputih/index.htm	Information about Indonesia packages especially in Bali, Lombok, Komodo, Baliem, Lake Toba, Flores, Medan and Paddang
http://www.asiahotels.com/	Short travel stories about staying in hotels and eating at restaurants in Indonesia Country information: weather, events, accommodations, entry information Destinations: Bali, Bandung, Batam, Jakarta, Java, Kalimantan, Lombok, Solo, Sulawesi, Sumarta, Surabaya, Yogyakarta
http://www.alloexpat.com/indonesia_expats_forum/viewforum.php?f=7	Information in details about Indonesia through travel stories/ Forum. Destinations emphasized: Bali, Jakarta, Bandung

http://www.lonelyplanet.com/	Information of destinations in Indonesia. Map Travel services Fast facts Tsunami Updates
http://www.indonesiatourism.com/	Interesting topics: About Indonesia, How to travel in Indonesia, Useful tips, Best of Indonesia, Arts and crafts Destinations: Bali, Jakarta, Bandung, Medan, Yogyakarta, Lombok, Maluku Map Travel service: accommodation booking Forum News of Indonesia
http://www.baliforum.com/travel/ubbthreads.php	Forum / Discussion about Bali topics
http://www.asianinfo.org/asianinfo/indonesia/about_indonesia.htm	General information about Indonesia Areas of Interest: Jakarta, Sumatera, People, Education, Economy, Politics, Transportation, Languages, Geography, History, Religion, Wildlife, Tourism

	Culture and Tradition: Arts and crafts, painting, performing arts, celebrations, customs Map
http://www.indonesianembassy.org.nz/DaftarMenu.htm	- Indonesia general information - Policy - Economic - Indonesia Culture and Tourism Board - Indonesian Tourism Information Network - Indonesian National Parks - Indonesian and Bali Tourism - Dive Exploration Indonesia - Indonesia e-Travel - Indonesia travel and tourism news portal with extensive links from tour packages to tourism business opportunities in Indonesia. - Information on Tourism - Access Bali online - Yogyakarta - Nusa Tenggara - Maluku -Hotel -Travel notes
http://www.indonesia-tourisminfo.com/	-Indonesia tourism -Nusa Dua -Hotel -Bali -Tickets -Tour reservations

http://www.smarttraveller.gov.au/	-Travel advisories - safety and security - local laws - entry and exit requirements - health issues -Travel tips
http://www.indonesiapromo.com	-Information about Indonesia -Adventure packages -Activities -Attractions : Bali, Java, Sulawesi, Irian Jaya, Sumatra, Kalimantan, Nusa Tenggara, Maluku

From the initial research of the interview of Thai travel agents and secondary data analysis based on the content analysis, Indonesia's images can be summarized as following:

- *Images from quotations:* The frequently stated images about tourism in Indonesia could be categorized into three clear images. Indonesia is seen as: Diversity of cultures, Land of rich natural resources, and beautiful resources in Bali. The examples of the quotations that reflect the images are such as:

"Unity in Diversity", which is the country's motto, accurately describe these diverse cultures and extraordinary people brought together to create one nation with one national language, Bahasa Indonesia "

"The floating emerald islands of the Indonesian archipelago have for centuries lured everyone from missionaries to pirates, mining companies and backpackers to their sandalwood and spice breezes, their Bali Hai lifestyle and their magnificent beaches, mountains and volcanoes."

*“For a long time the image of Indonesia as a tourist destination has been associated with the **island of Bali**, that has gained a reputation as a superior sun, sand, surf, and sea area.”*

- *Images from the pictures:* the 30 top websites of tourism in Indonesia were reviewed these websites were retrieved from the keyword “tourism Indonesia.” The pictures appeared on the first page of these websites were categorized into five clear images which are: Historical Treasures, Natural Beauty, People’s ways of life, Rich cultures and arts, and International standard facilities.
- *Images from the review focused on attractions and package tours:* The mostly stated four main attractions are: Bali (tropical paradise), Jakarta (city centre), Lombok (Bali’s sister island), Java (arts and culture), Yogyakarta (local life), and Sulawesi (adventure and nature).

The results of images and themes after the focus group meeting of key informants

After the discussion in the focus group meeting from the key informants, there were several inputs. Eight positioning images were received from the brainstorming process of the focus group. Those images were:

- Real Asia
- Small United Nation (from point of view of culture)
- Indonesia Ultimate in Diversity (Have been used for 3 years)
- Visit Beautiful Bali Indonesia (This is the proposed image from the government)
- Paradise Equator
- Uniquely Indonesia

- Smiling Island
- Where culture and nature blend

Finally, the key informants voted for the image of **“Where culture and nature blend”**. The reason is that tourism of Indonesia is cultural oriented and variety in cultures and arts. One of the key informants stated that “Indonesia has high potential for culture, adventure, and nature (CAN) Tourism.” Most of Indonesia’s attractions are based on culture, therefore, Indonesia should stress the tourism image on “culture” as the first priority. When asking the focus group what Indonesia should be specialized for in ASEAN tourism, the meeting group voted for Culture Tourism.

Themes presented

The researcher proposed three tourism themes to the focus group meeting resulted from the research in the first phrase. The themes were Ecotourism, Cultural Tourism and Agritourism. The key informants prioritized the themes into Cultural Tourism, Nature-based Tourism and Ecotourism.

Fifteen attractions

The focus group meeting was asked to input fifteen main attractions which represent tourism in the country and to be published in ASEAN Tourism Book. From the process of brainstorming, the result of fifteen attractions are:

1. Borobudur



2. Bali



3. Yogyakarta



4. Tana Toraja



5. Toba Lake



6. Komodo Island



7. Bunaken National Park



8. Raja Ampat



9. Tanjung Puting National Park



10. Leuseur



11. Way Kambas National Park



12. Jakarta



13. Bandung



14. West Sumatera



15. Kalimutu Lake



CONCLUSION AND DISCUSSION

Indonesia is the country with high potential of tourism development as shown in the strength of the SWOT analysis. However, there are problems that also highly affect the growth of tourism in the country that need to be resolved.

Between April to July 1997, the number of foreign tourists visiting Indonesia still showed an increase by 3.9%. The decline occurred since July 1997 due to the monetary crisis, natural disasters and security disturbances in many regions. Indonesia has a number of socioeconomic problems that affect not just the growth of international tourism but also domestic tourism. Although Indonesia's economy is progressive and regionally important, the problems of widespread corruption, poverty, illiteracy, political instability and regional separatism remain major issues hindering national tourism development.

Disregarding the problems which are the obstacles of tourism development, Indonesia has high potential to promote nature-based tourism, cultural tourism, and in some parts historical tourism. This could be confirmed from the SWOT analysis, images, themes and topics presented from the review of this research. The reason to emphasize nature-based tourism theme is because 45% of the country is covered by forest and the country still rich in nature resources and has large system of national parks. Although the government tried to promote ecotourism in the country but the weakness of the lack of proper management seem to be a problem to make ecotourism succeed. The ecotourism theme could be promoted in the tourism destinations which have already developed the system which can effectively educate tourists who visit.

As for the cultural and historical tourism, whilst unity has been a result of history, different cultures are based on many different ethnic groups found throughout the country which have maintained their traditions, languages and dialects. Protected by adat (customary law) which differs from one region to another, modernization is only a

superficial veneer covering the daily life in the cities. As well as superb traditional dances, there are classical Gamelan orchestras, Shadow Puppet Plays, Dramas, and a variety of traditional cultural entertainments unique to this culture.

Customs and traditions which have merged with religious teachings, have brought about different ceremonies and festivities, which vary from area to area. The Indonesian culture originated from the farming activities of the indigenous people. It was influenced by the waves of traders from India, China, Saudi Arabia and Europe. Therefore, the cultural tourism theme is one of the themes that Indonesia should not oversee and it should be promoted internationally as being confirmed from the result of the study.

Moreover, the image that should represent tourism of the country that resulted from the focus group and interview is the country “where culture and nature blend”. This should be supported by the process of promotion within and outside the country.

This study is also one of the implementations that endeavor to build ASEAN tourism network. As the results and the research process especially the focus group meeting in Indonesia, this networking is considered successful. The continuation of the network is possible as everyone share the same goal that is to develop tourism in ASEAN sustainably and promote tourism of ASEAN internationally.

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APPENDIX I

Pictures of the Focus Group Meeting at the Ministry of Culture and Tourism,
Indonesia: 16 January 2007







APPENDIX II



Dear Distinguished Participant

I would like to express my thank to you for your kind cooperation and willingness to join the focus group meeting on this 16 January 2007 at Department of Culture and Tourism of Indonesia. According to my initial contact, this meeting will be about tourism in Indonesia which will ask for your comment and find agreement in the content of SWOT analysis, themes and images positioning, and attractions in Indonesia. The key participants will be from education, government and business sectors as one of the objectives of the project is to build up network among involved stakeholders.

However, the time of the meeting is a limit; therefore I would like to ask for your kind help to read and fill out the following questionnaire before the meeting and further discussion will be upon the comments you have made when we meet. Please kindly bring the filled questionnaire with you on the day of the meeting. I have also attached the sequence of our meeting below for your information.

I am very much appreciated your participation in this meeting and looking forward to meeting you in Indonesia soon.

Best Regards,

Dr. Pimrawee Rocharungsat

**FOCUS GROUP MEETING
ASEAN IMAGE POSITIONING PROJECT
(THE CASE STUDY OF INDONESIA)
SUPPORTED BY THAI RESEARCH FOUNDATION
16 JANUARY 2007**

9 a.m. – 1.30 p.m.

- 1) Registration of the participants**
- 2) Introduction of the project and introducing the team**
- 3) SWOT analysis presentation and discussion**
- 4) Presentation about the images/ themes**
- 5) Asking the key informants to discuss and comments about images and themes of tourism in Indonesia**
- 6) Additional brainstorming about the main and possible attractions of the country**

7) *Lunch Break*

- 8) Conclusion/ Agreement of SWOT, Images and Themes**
- 9) Presenting the souvenir by Dr. Terdchai (Head of the project from TRF)**
- 10) Photo taking of the group – End of the meeting**



Questionnaire: Tourism Image Positioning of Indonesia

**Please provide your comments on this initial SWOT analysis of
tourism in Indonesia**

<u>Strengths</u>	<u>Agree</u>	<u>Disagree</u>	<u>Reason</u>
Indonesia has a large system of national parks considering the size of the country. Tourism is a key incentive for local people to help protect the national parks. Guung Gede Pangrango National Park and Mjung Kulon National Park were first protected area established in 1978 in Indonesia.			
The country is rich in natural resources .			
Indonesia consists of a multitude of islands, of which 6,000 are inhabited, extends across the three time zones, from Sumatra in the west to Papua in the east, and offers a great variety of scenery , from the rice paddies of Java and the rainforests of Kalimantan (Borneo) to the snow-capped mountains of New Guinea.			
Indonesia has around 300 ethnic groups each with cultural differences which have shifted over the centuries. Prominent example is the Borobudur temple, which is a mix of Hinduism and Javanese culture, as it was built by a Javanese dynasty, the Sailendra. Indonesia has also imported cultural aspects from Arabic, Chinese, Malay and even European sources.			
Art forms in Indonesia were developed in the courts of former kingdoms such as in Bali, where they are part of religious ceremonies. Art forms in Indonesia also have been influenced by several cultures. The famous dance dramas of Java and Bali are derived from Hindu mythology and often feature fragments from the Ramayana and Mahabharata Hindu epics. The " Wayang kulit " (leather puppets) of Java is performed with leather puppets held by the puppeteer.			

The "Wayang Golek" (wooden puppets) of West Java is based on the same concept. The crafts of Indonesia vary in both medium and art form. As a whole the people are artistic by nature and express themselves on canvas, wood, metals, clay and stone. The batik process of waxing and dyeing originated in Java centuries ago and classic designs have been modified with modern trends in both pattern and technology. There are several centres of Batik in Java, the major ones being Yogyakarta, Surakarta, Pekalongan and Cirebon. Batik is also being produced in some other areas as in Bali where local designs are incorporated. <i>Pencak Silat</i> is a unique martial art originating from the archipelago. Indonesian music varies within cities and groups as people who live in the countryside would listen to a different kind of music than people in the city. Highly stylized in movement and costume, dances and the "<i>wayang</i>" drama are accompanied by a full "gamelan" orchestra comprising xylophones, drums, gongs, and in some cases string instruments and flutes. Bamboo xylophones are used in North Sulawesi and the bamboo "angklung" instruments of West Java are well-known for their unique tinkling notes which can be adapted to any melody.			
Indonesia is rich in history. The Indonesian archipelago, specifically Java, was inhabited by <i>Homo erectus</i>			
Tourism resources of prominent islands / cities are: Java: dominated by a chain of high volcanic mountains such as Mount Bromo in the east of the island that still active. The island's fertility has supported a number of advanced civilizations. The most spectacular examples of the heritage are the temple at Borobodur, which is world largest Buddhist edifice, and the lesser-known Hindu temple at Prambunan nearby. The palace of former sultans at Solo and Yogyakarta also attract growing numbers of cultural tourists. Jakarta is the primarily gateway and business centre, and also offer the historic port area, Batavia. Jakarta retains much from the colonial Dutch and British periods. Sumarta: Sumatra is the second-largest island in Indonesia, straddling the Equator, with a volcanic mountain range, hot springs, unexplored jungle and vast plantations. The separatist uprising in Aceh			

province has had a negative impact on tourism in the northern part of the island. Tourism resources here include the mountain scenery around lake Toba, world's largest craters; the remaining rainforests ; and the distinctive folklore of the Menankabau people. Bali: known as 'tropical paradise' where artistic people live in harmony with their environment. The tourism resources include a spectacular landscape. The opening in 1986 of international airport ay Denpasar was the catalyst for the large-scale expansion of tourism. Bali is famous for it's woodcarving and sculptures; silver and gold jewelry, woven cloth, sarongs, traditional and realist paintings, bone and coconut shell carvings, antiques, basket wares and masks. Lombok: has been the main beneficiary of government policy to separate tourism away from Bali. The two islands are same size but Lombok is less developed version of Bali. It has drier climate and a Muslim culture. The authorities have set out to attract upmarket tourists with luxury hotels and the associated infrastructure including a new international airport and improvements to ferry services, port facilities and road network. Sunda Islands: It is to the east of Lombok and remain undeveloped, but increasingly feature on the backpacker's trail, closely followed by divers and surfers. Ecotourism has potential for growth in some of the islands such as Komodo. Sulawesi: offers world- class diving. The Benaken National Park is an outstanding example of marine conservation. In the mountainous interior the Toraja villages with their unique architecture and ceremonies based on ancestor worship provide the main attraction for tourists.			
Several national tourist events have been held throughout Indonesia. The events are such as Toba Lake Festival in North Sumatra; The Indonesian Archipelago Palace Festival in West Java; Borobudur Festival in Central Java; Bromo Festival in East Java; The Balibo Art Festival in East Timor; The Bidar Kapuas Festival in West Kalimantan; Sea Park Festival in Maluku; and the Lembah Baliem Arts and Culture Festival in Irian Jaya.			
Indonesia is the world's largest Muslim nation, with a population approaching 250 million.			

Indonesia is rich in art and culture which are intertwined with religion and age-old traditions from the time of early migrants with Western thoughts brought by Portuguese traders and Dutch colonists. Though the legal system is based on the old Dutch penal code, social life as well as the rites of passage are founded on customary or " <i>adat</i> " law which differs from area to area.			
Community-based tourism in Indonesia is considered to be an innovative mechanism as the overall picture. Indonesia has some tourism sites as example for good practices inventory cases identified by APEIS (2006). - Community-based tourism at Gunung Gede Pangrango National Park - Building a unique partnership among major stakeholders to promote responsible tourism in Gunung Rinjani National Park - Community-based tourism in Gunung Halimun National Park - Ecotourism as a tool for switching communities from destructive to non-destructive activities, Tangkahan, Gunung Leuser National Park - Local community initiative in developing culture and nature tourism in Bromo Tengger Semeru National Park Indonesia			
Tourism can bring supplementary income to the local communities for example to in place of illegal hunting and cutting trees especially when protected areas in Indonesia are declared.			
Local people do not necessarily conceptualize the changes coinciding with tourism and affecting their way of life in terms of cultural denigration. For example, the Balinese seem to regard tourism as an enrichment of their culture.			
Tourism is gaining a more important sector as a foreign exchange earner. To production and growth in the industry, the government has formulated new policies and improved facilities . Significant progress has been made in communications and transportation and since 1976, Indonesia has had its own communications satellite system which has enabled rapid expansion of telephone, television and broadcast facilities to all 27 provinces. Air and sea ports are being extended to cater to the growing traffic on both domestic and international sectors, of passengers as well as freight.			

Tourism continues to be a priority for the new democratic government , with the restructured Directorate General of Tourism developing the market for conferences, exhibitions and incentive travel.			
In fiscal year 1997/98, the Main National Tourism Development Plan (RIPP) was completed.			
Under the New Order government, the promotion and development of tourism was focused primarily on the role of tourism as a foreign exchange earner rather than on the development of outbound or domestic leisure travel.			
Having been criticised, in the past, for the destruction of large areas of its rainforest through forest exploitation, the Indonesian government is now keen to encourage an environmentally friendly tourism policy .			
Tourism in Indonesia is being developed through two main programs , covering tourism and tourism products. There are five supporting programs, namely' control of environmental pollution, education, training and tourism guidance; tourism research and development; tourism infrastructure development; and the supervision and development of arts and culture.			
Group tourist awareness (Pokdarwis) has been established as moving spirit for tourist development such as the improvement of tourist attractions to socialize the Seven Charms Program (Sapta Pesona) consisting of safety, cleanliness, orderliness, comfort, beauty, hospitality, and enchanting memories. The Tourist Awareness Campaign every year adopted different themes in accordance with the national development rhythm and dynamics. In 1997, the theme was The Year of Cooperatives and Telecommunication and in 1998 the theme was: The Year of Art and Culture.			
Indonesia has participated in several important tourism promotional events abroad. The Ministry of Culture and Tourism of Indonesia participated in JATA World Travel Fair 2006, held in the Bigsight Building, Tokyo last September 21-23, 2006.			
Tourism Indonesia Mart & Expo (TIME) 2006 was			

officially closed on September 22, 2006 in Makassar, South Sulawesi. The total transaction made was estimated to reach US\$ 15 million. The biggest Indonesian mart in global scale was participated by 110 buyers from 21 nations and 124 sellers from 20 provinces in Indonesia, occupying around 105 booths at the exhibition, according to a release from the TIME 2006 organizer.			
Tourist promotion campaigns have been staged through Indonesia's Seven Tourism Promotion Centers abroad, namely in Frankfurt, Los Angeles, Tokyo, Singapore, Sydney, London and Taipei. Since 1989 the Indonesia Tourism Promotion Agency (BPPI) developed new markets and improved promotion programs.			
Indonesia also promote convention tourism. There were 26 companies operating in the convention services business, including the Jakarta Convention Center, Jakarta International Trade Center and Bali International Convention Center.			
Indonesia has a good internal air system linking most of the larger towns to Jakarta. PELINI, the state-owned shipping company, has six modern ferries serving all the main ports across the archipelago. There are nearly 7000km (4350 miles) of track on Sumatra, Madura and Java. An extensive rail network runs throughout Java. Traffic drives on the left. There are over 378,000km (234,360 miles) of roads in the country, of which about 28,500km (17,670 miles) are main or national roads and 200km (125 miles) are motorway. Nearly half of the network is paved. There are two forms of tricycle rickshaws available in Indonesia: the motorised version is called bajaj (pronounced 'baj-eye'), which is a bright orange colour and seats two passengers, with the driver in front; and the becak (pronounced 'be-chak') is pedal-powered by a rider sitting behind a maximum of two passengers.			

International hotels are found only in major towns and tourist areas. Several of these have business centres with a variety of services. However, hotels of all grades from deluxe to standard can be found in most towns around the country.			
The Indonesian archipelago is one of the world's top surfing destinations. The best time to surf is from April to September. (Sumatra, Java, Bali, Lombok, Sumbawa, Flores and Sumba)			
There are approximately 80,000km (50,000 miles) of coastline, reputed to contain 15 per cent of the world's coral reefs. Therefore Indonesia is famous for diving activity. (Java island, Sanggihe-Talaud and Togian, Gili islands, the Bandana islands, the Sumatra and Riau islands)			
Other activities are: climbing, caving, sailing, volcano trekking. Jungle trekking			
In 2004, arrival by air predominated by visitors from Asia (excluding ASEAN) 39.08%, of which were from Japan 17.28%, followed by Taiwan 10.42%. Whereas visitors from ASEAN, Europe and Oceania were amounted about 21.75%, 20.04% and 12.70% respectively. Unlike arrival by air, visitor arrival by sea mostly come from ASEAN that was 72,12%. Among other were from Singapore 53.54% and Malaysia 15.70%. In 2005, the international visitors volume decreased from 2004. However, the international visitors visit Indonesia reaching 5,002,101.			

Weaknesses	Agree	Disagree	Reason
Need innovative system for tourism management to induce good governance			
Insufficient budget for tourism management			
Insufficient data and research to support sound tourism and protected area management.			
Local people have few benefits - Poverty of local communities - No cooperation in natural resources/biodiversity conservation - Few communities involved in tourism management and/or decision-making - Less benefit distribution from tourism to local communities - Conflict of interests			
Weaknesses from tourism development/activities in protected area - Over-capacity of visitors - Increased visitors effect on the environment - Lack of CBT policy and/or policy implementation - Lack of law enforcement/visitor management - Low visitor awareness of tourism effects.			
Government policies towards the local tourism sector vary widely, and there is no consensus regarding the ways in which tourism should be developed and the major objectives that this development should pursue. Where state-bureaucracies expect tourism to contribute significantly to national development, tourism policy is directed towards large-scale investments in co-operation with transnational enterprises and project developers that inhibit the participation of local people. The result is that profits remain beyond the reach of local communities.			
Informal economic activities are of considerable importance in many tourism destinations. Characteristics of the informal sector generally include lack of legal recognition and registration, evasion of taxes, ease of entry, reliance on			

indigenous resources, family ownership, small scale of operation, labor intensiveness, skills acquired outside formal education systems, part-time labour, locally-based ventures, and unregulated and competitive markets.			
Economic implications of tourism development that are frequently mentioned concern the acceleration of inflation because of increasing tourist expenditure, the displacement of labour and increasing dependence on the industry, the loss of the best agricultural land to tourism, and the reduced access to reefs and shorelines for fishing.			
Much has been written about the economic costs of tourism development: the leakage of foreign exchange because of the necessity to purchase foodstuffs, capital goods, and other items to support the tourism industry, and the repatriation of profits when multinational firms are involved.			
The corruption, collusion, and nepotism ('KKN' is the Indonesian abbreviation) which characterized Suharto presidency, built up a public resentment that led to the eventual downfall of the Orde Baru (New Order) regime but also clearly exacerbated ethnic tensions in Indonesia.			
Limited infrastructure includes: lack of modern vehicles, roads and railways, unreliable power supply, slow and costly installation of telecommunication facilities.			
There is also ethnic tensions in Indonesia, particularly between Indonesians of Chinese ethnicity and the Pribumi peoples. The fall of the authoritarian Suharto regime destabilized the country, bringing to the surface ethnic and religious tensions, such as between the Muslim majority and the ethnic Chinese- who dominate the commercial sector- and the Christian community in the Moluccas.			

Opportunities	Agree	Disagree	Reason
The IUCN has declared the general purposes of protected area declaration to protect and maintain biological diversity and natural and cultural resources. This support the protected area system in Indonesia.			
Indonesia is a founding member of the Association of South East Asian Nations, and thereby a member of both ASEAN+3 and the East Asia Summit. Since the 1980s, Indonesia has worked to develop close political and economic ties between South East Asian nations, and is also influential in the Organization of Islamic Conference.			
In facing the globalization era and to improve the regional and sub-regional economic endurance, a closer cooperation program in the tourism sector has also been implemented with several ASEAN countries, such as the Indonesia, Malaysia, Singapore - Growth triangle (IMS-GI), Indonesia, Malaysia, Thailand, Growth-triangle (IMT-GT) and Brunei, Indonesia, Malaysia, the Philippines East ASEAN Growth Area (BIMP-EAGA) on marketing and promotion of tourist package programs, promoting tourist marketing between the member countries, accommodating and mobilizing private investment in the field of tourism.			
Media freedom in Indonesia increased considerably after the end of President Suharto's rule, during which the now-defunct Ministry of Information monitored and controlled domestic media and restricted foreign media. The TV market includes 10 national commercial networks, which compete with public TVRI. Some provinces also operate their own stations. Private radio stations carry their own news bulletins and foreign broadcasters can supply programmes. The radio dial is crowded, with scores of stations on the air in Jakarta alone. Internet use is increasing <i>Bisnis Indonesia</i> reported in 2004 that there were 10 million users.			

Threats	Agree	Disagree	Reason
Threats to natural resources, biodiversity and environment - Protected area encroachment - Illegal logging and hunting - Development pressure in protected areas (expanding industry, community settlement, visitor facilities) - Low local awareness of natural resource conservation.			
A massive earthquake and tsunami on 26 December 2004 devastated parts of northern Sumatra, particularly Aceh. On March 2005, a powerful earthquake destroyed most buildings on Nias Island, west of Sumatra. Hundreds of people were killed. Partly as a result of the need for cooperation and peace during the recovery from the tsunami in Aceh, peace talks between the Indonesian government and Gerakan Aceh Merdeka (GAM, the Free Aceh Movement) were restarted and have borne fruit in a peace agreement. On the morning of Saturday, May 27, 2006, the city of Yogyakarta was struck by a severe earthquake. More than 6,000 people are currently estimated to have died.			
Indonesia received international condemnation for its annexation of East Timor in 1978. Indonesia was heavily criticized between 1998 and 1999 for allegedly suppressing human rights in East Timor, and for supporting violence against the East Timorese following the latter's secession and independence in 1999.			
After the 2002 Bali bombing, “Black October”, terrorist activities have become increasing significant in Indonesia. The bombing, in which 202 people, including 164 international tourists died, destroyed two nightclubs in Kuta, Bali. By looking at the number of international tourist deaths, the terrorist activity has been taken very seriously not only by the Indonesian government, but also international world. Over the next four years there were several other terrorist attacks including the 2003 Marriott Hotel bombing, 2004 Jakarta embassy bombing and 2005 Bali bombing.			

As a result, a number of countries have issued travel warnings for international tourists and workers.			
There are several warnings through international media about different areas of Indonesia : Aceh: Despite the Aceh Peace Agreement being signed on 15 August 2005 the security situation remains unstable. The waters 12 nautical miles around Aceh are closed to all foreign shipping. Under Indonesian law tourists are banned from entering Aceh and the activities of all other foreigners including journalists and aid workers are regulated. Maluku: There was strongly advise not to travel to Maluku province (particularly Ambon) due to the unsettled security situation, including the risk of bomb attack Kalimantan: Communal tensions in mixed Dayak and Madurese areas may turn violent. Papua: Political tensions associated with anti-government groups in Papua and inter-ethnic tensions may lead to violence. Sulawesi: There is violence associated with inter-ethnic tensions. West Timor: The security situation in West Timor remains unsettled, particularly in areas near the border with East Timor, where security incidents continue to occur and have the potential to inflame local tensions.			
Since the late 1990s, Indonesia's economy suffered a drastic downturn followed by an at times patchy and slow recovery. This was due not only to the financial crisis that struck much of east Asia at the time, but also, due to corruption at all levels and a perceived slow pace of economic reform.			

The Asian financial crisis of 1997-1998 affected Indonesia more severely than others in the region, with the result that the majority of the population live below the poverty line.			
In the past year there have been human cases of avian influenza in Indonesia.			
Other health concern in Indonesia include polio, dengue fever, and smoke haze.			

The followings are examples of images about tourism in Indonesia (taken from travelogue and websites)

*For a long time the image of Indonesia as a tourist destination has been associated with the **island of Bali**, that has gained a reputation as a superior sun, sand, surf, and sea area.*

*Variety is the spice life and nowhere is this more true than in Indonesia. No two places are alike in unspoiled beauty, art, culture and people. The towering mountains and primitive cultures of Irian Jaya contrast sharply with the terraced hills, and highly sophisticated societies of Bali and Java and the animistic beliefs which still have a major influence on the way of life in South Sulawesi. "**Unity in Diversity**", which is the country's motto, accurately describe these diverse cultures and extraordinary people brought together to create one nation with one national language, Bahasa Indonesia.*

***Spices and hot chili peppers** are the essence of most cooking, and in some areas they are used generously such as in West Sumatra and North Sulawesi.*

*From the wilderness of Sumatra; the steaming volcanoes of Java; the temples and beaches of Bali home of the Komodo Dragon, and the serenity of the less-developed island of Lombok, Indonesia offers **a rich diversity of landscape, cultures, tradition and religion**. And there's plenty of wide toothy smiles to greet visitor.*

*With a wealth of culture, natural beauty and marine sporting facilities, **Indonesia has all the potential** to become one of the region's top tourist destinations.*

Please write the most prominent main tourism images in Indonesia from your opinion

1).....

2).....

3).....

Indonesia is suitable for these following tourism themes (please put the number in order of importance)

.....Cultural tourism

.....Historical tourism

.....Adventurous tourism

.....Eco-tourism

.....Natural based tourism

.....Agro-tourism

.....(others, please specify).....

.....(others, please specify).....

If tourists visit Indonesia, they should not miss visiting these places

1).....in

2).....in

3).....in

4).....in

5).....in

6).....in

7).....in

8).....in

9)..... in

10).....in

The unseen attractions in Indonesia that could be developed are:

1).....in

2).....in

3).....in

4).....in

5).....in

6).....in

7).....in

8).....in

9).....in

10).....in

Additional comments:

I am willing to provide this information to the researcher and willing for it to be presented to the public

(Signature)

APENDIX III

Registration form of the participants



REGISTRATION FORM

FOCUS GROUP MEETING
ASEAN IMAGE POSITIONING PROJECT
(THE CASE STUDY OF INDONESIA)
SUPPORTED BY THAI RESEARCH FOUNDATION
16 JANUARY 2007

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	NAME	SURNAME	POSITION	ADDRESS/TEL./EMAIL
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11	DIYAH BEKTI	ERNAWATI	HEAD OF CENTER FOR TOURISM RESEARCH & DEVELOPMENT	clberna @ uns. ac. id 0856 281 4513 (M).
12	Rapi Mappa	Rapi		Tourism Centre (021) 3838601
13				
14				
15				

APENDIX IV

The Signed Letter of Agreement



LETTER OF AGREEMENT

The researcher has conducted the research in the topic of **Indonesia Tourism Image Positioning** at the Department of Culture and Tourism in Indonesia on 16 January 2007. This was the process of focus group meeting. The key participants were from education, government and business sectors. This is to encourage networking among involved stakeholders. The topics of the meeting were about tourism in Indonesia which asked the comment and find agreement among key participants in the content of SWOT analysis, themes and images positioning, and attractions in Indonesia.

The meeting has successfully finalized with an agreement on SWOT of tourism in Indonesia, clear themes and images of tourism in Indonesia, and recommended and possible tourist attractions in Indonesia. There were totally key participants involved in the meeting and all have agreed on the topic discussed and willing to have the information be presented to the international public. Therefore all participants have signed to confirm the agreement of the content being discussed here in this letter and show their consent to express the results of the meeting to the public.

1. IG PITANA	(		)
2. Caella Parengkuan, PHRE	(		)
3. SURYA DHARMA	(		)
4. FRANCESCA NINA S.	(		)
5. Rani Mappila	(		)
6. HARRIS L. GAN	(		)
7. Isdaryono	(		)
8. Dyah Bekh Ernawati	(		)
9.	(		)
10. SULAEMAN	(		)
11.	(		)
12.	(		)