

SUSTAINABLE TOURISM

Opportunities to Create Green Job



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Foundation

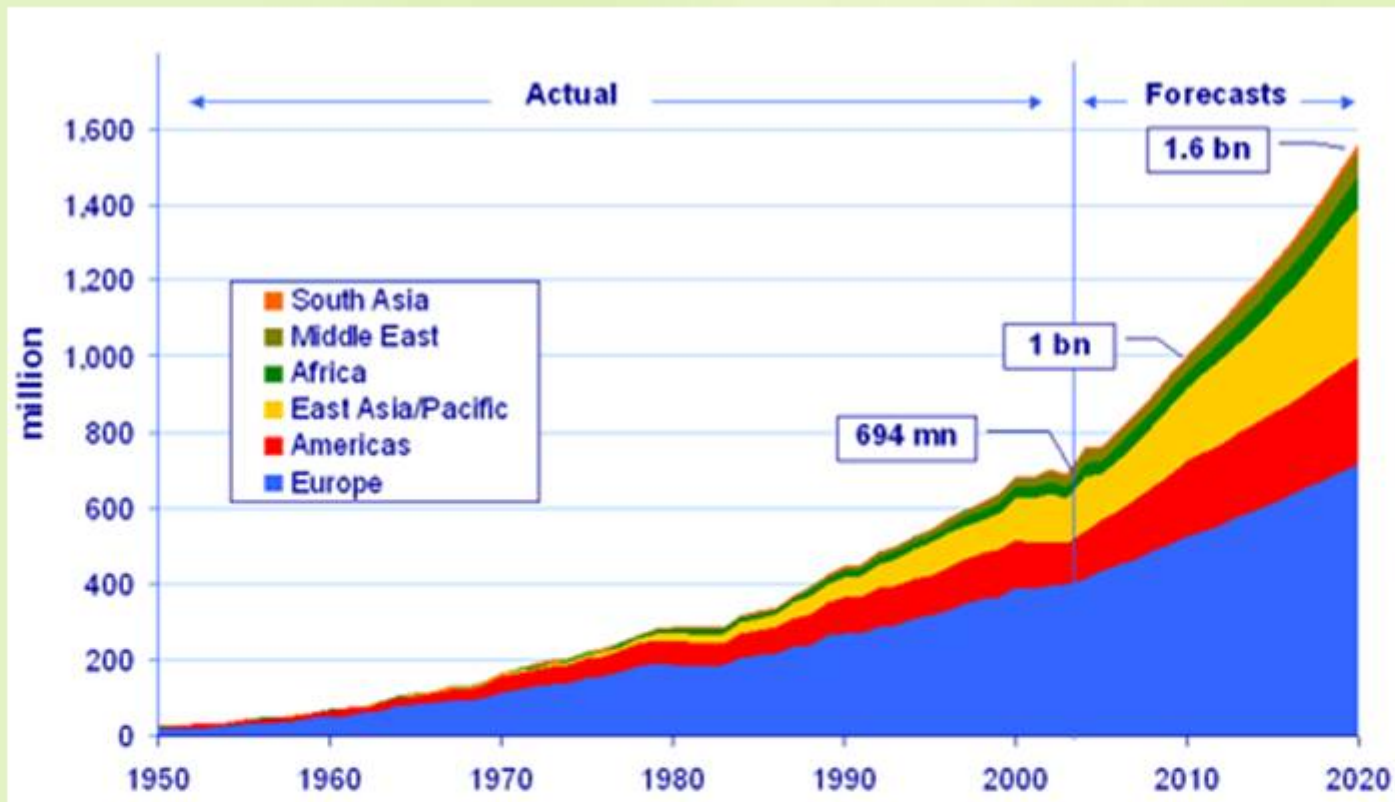
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Tourism is one of the world's largest industries and one of its fastest growing economic sectors. It has a multitude of impacts, both positive and negative, on people's lives and on the environment.



Sustainability principles refer to the **economic, environmental, and socio-cultural aspects of tourism development**, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.

Forecast International Arrivals



UNWTO's *Tourism 2020 Vision* forecasts that international arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intraregional and 378 million will be long-haul travelers. The total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and the Americas (282 million), followed by Africa, the Middle East and South Asia.

Overall, international tourist arrivals totaled **642 million** during **January-August 2010**; This is some 40 million more than 2009 (+7%) and one million more than in the same period. Based on the current trend, international tourist arrivals are projected to increased in the range of 5% - 6% over the full year.

Asia and the Pacific, the region to have first shown signs of rebound at the end of 2009, posted an **impressive +14%**. Compare with the pre-crisis year of 2008, the region has already gained an extra 10 million international tourist arrivals. **Most of destinations have registered double-digit growth rates**, many even above 20%, showing once again resilience and a strong capacity for recovery.

24 posted double-digit growth including Estonia, Israel, **Hong Kong (China)**, **Macao (China)**, Japan, Taiwan (pr. of China), Indonesia, Singapore, Vietnam, Guam, India, Nepal, Sri Lanka, US Virgin Islands, Nicaragua, Ecuador, Kenya, Seychelles, Morocco, Egypt and Saudi Arabia.



The Role of Global Tourism for Economy

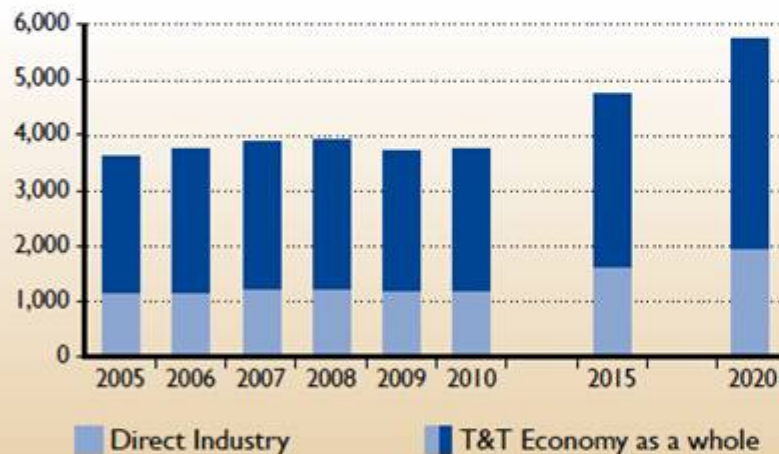
- Tourism contributes 6% of global export for goods and services
- Tourism is the 4th exported goods globally after oil, chemical, automotive
- Tourism contributes 5% of total global economic activities
- **Tourism provides 6-7% of jobs globally**
- 1 out of 5 highest earning from export in 150 countries

Sumber : UNWTO, 2010

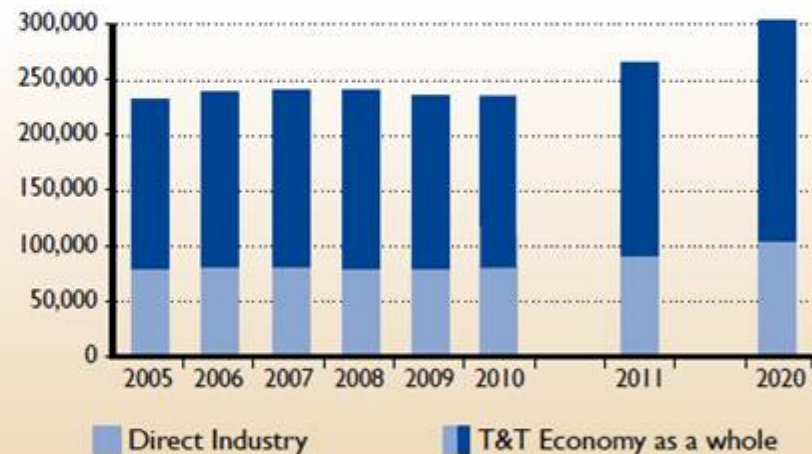
Tourism and Job Provision

235 million of jobs or 8,1 % of total job provision globally

WORLD
Travel & Tourism GDP
(2000 constant US\$ bn)



WORLD
Travel & Tourism Employment
('000 jobs)



Tourism in South East Asia

- 65million international tourist arrival in 2009
- Tourism GDP : US\$ 165 billion → 9,7 % of total GDP
Tourism is projected to grow by 6,3%/year in average up to 2020
- Tourism provides 22.581.000 jobs → 8,1 % of total jobs created

Sumber : WTTC, 2010

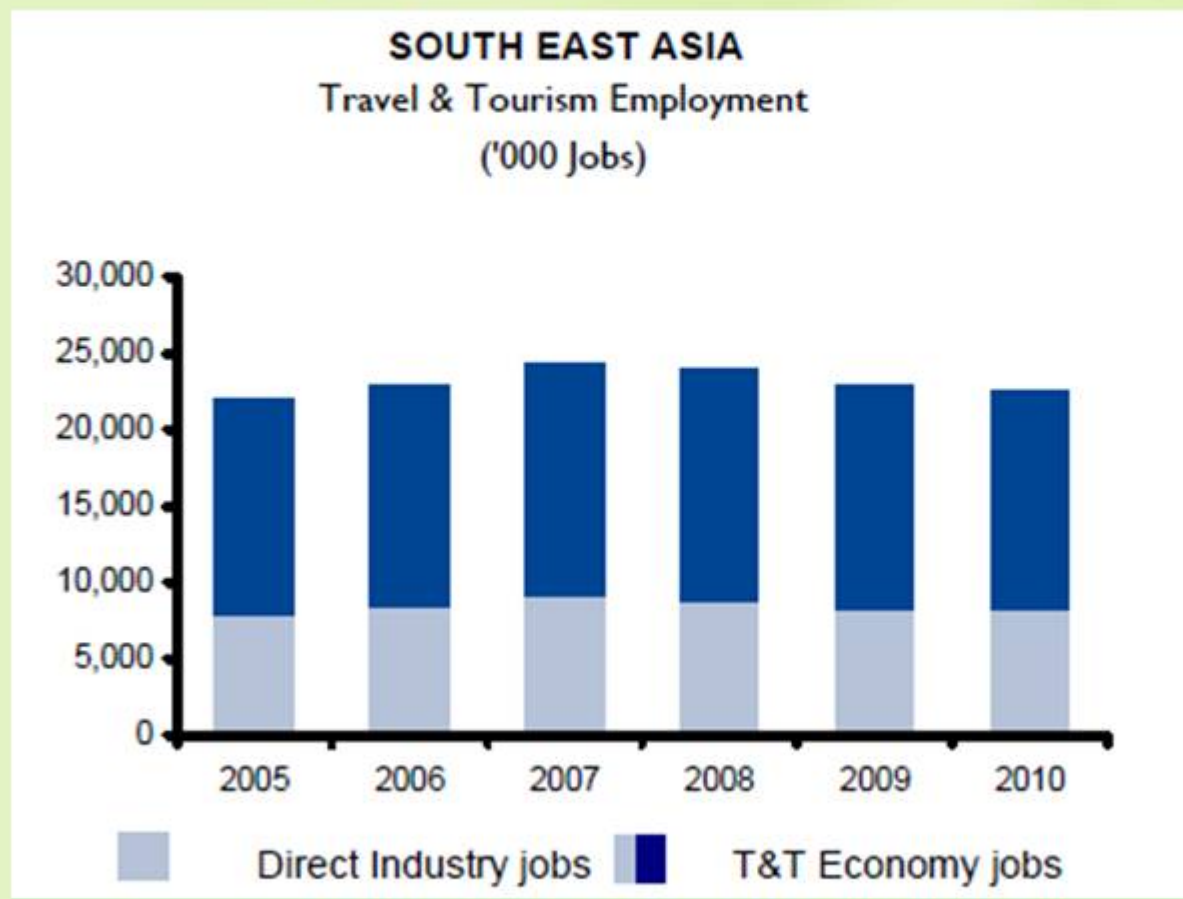
ASEAN Tourist Arrivals: 2005 – 2008

Year	Total Arrivals	Growth Rate	ASEAN Arrivals	Growth Rate	% Share
2005	52,811,170	n/a	24,403,222	n/a	46.21%
2006	56,914,488	7.77%	25,396,631	4.07%	44.62%
2007	62,272,270	9.41%	27,335,279	7.63%	43.90%
2008	65,605,499	5.35%	30,276,449	10.76%	46.15%
2009	65,749,758	2.20%	31,107,299	2.74%	47.31%

(Source: ASEAN Secretariat)

Jobs in Tourism in South East Asia

Tourism is projected to provide 29,402,000 jobs in 2020



INDONESIA AT A GLANCE



± 237 million people

More than **17,000** islands

Extending **5,120 km** from east to west and **1,760 km** from north to south, with **total land area 1.9 million km²** and **7.9 million km²** (including sea)

MEGA BIODIVERSITY: Terrestrial



16% of the world's reptiles and amphibians



35 primate species, 25% endemic



121 butterflies species,
44% endemic



17% of the world's
birds, 26% endemic

Forest Diversity

About **59%** of terrestrial areas in Indonesia are tropical forest or **10%** from the total forest area in the world (Stone, 1994).

There are about **110 million Ha** of the total Indonesia's forest classified as preserved forest which **18.7 million Ha** are conservation area, including:
51 National Park; Nature Recreation Park Nature Reserve; Protected Forest



12% of the world's mammals,
36% endemic



Moreover, the percentage of endemic flora in Papua reaches 60-70%

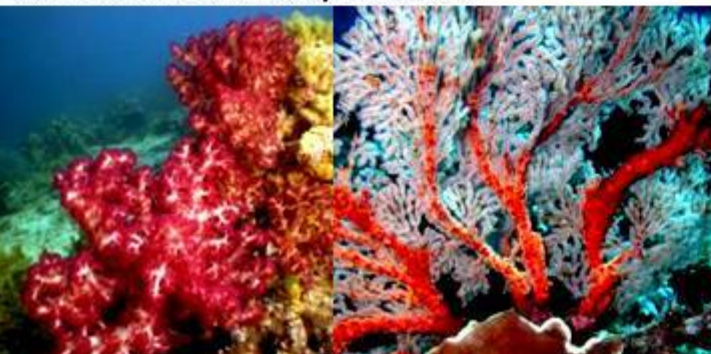
MEGA BIODIVERSITY: Marine

Coral Golden Triangle



Indonesia has approximately **50.875 km²** of coral reefs. If this conservative estimate is accurate, it means that **51%** of the South East Asia region's coral reefs and **18%** (284.300 km²) of the world's coral reefs are found in Indonesian waters.

-World Resources Institute



This abundance of coral reefs is not only contributed to biodiversity, but also to science and economic development in Indonesia and the world

CULTURAL DIVERSITY



More than **500** native ethnicities

742 different languages and dialects

Tourism in Indonesia: Arrival and Revenue



Sumber: Dep. Kebudayaan dan Pariwisata 2010

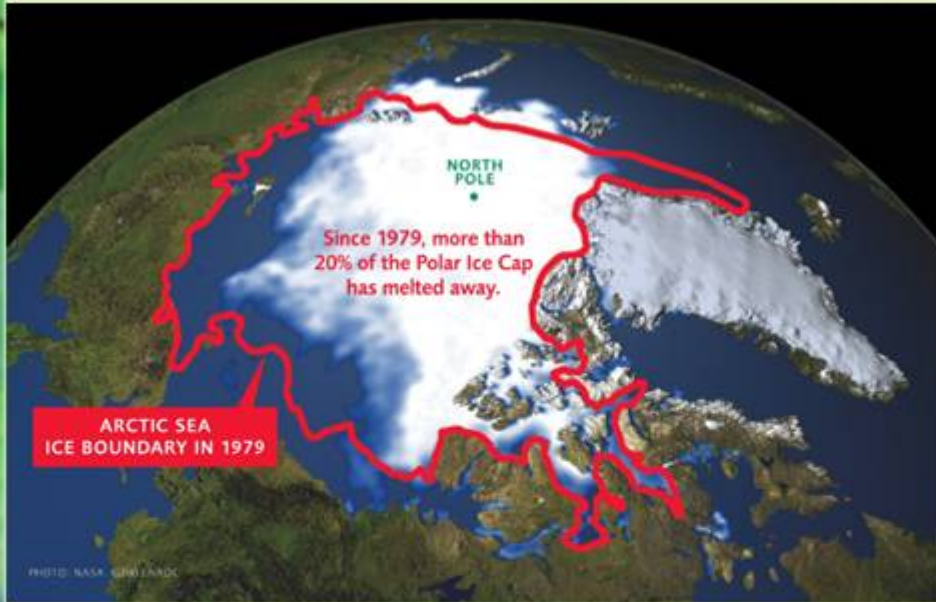
Role of Tourism for Economy Indonesia

Rank	2006		2007		2008		2009	
	Commodity	Value (Billion USD)	Commodity	Value (Billion USD)	Commodity	Value (Billion USD)	Commodity	Value (Billion USD)
1	Gas & Petroleum	21,21	Gas & Petroleum	22,09	Gas & Petroleum	27,71	Gas & Petroleum	19,02
2	Garments	5,61	Palm Oil	7,87	Palm Oil	11,64	Palm Oil	10,37
3	Rubber Products	5,46	Rubber Products	6,18	Rubber Products	7,58	Tourism	6,29
4	Palm Oil	4,82	Garments	5,71	Tourism	7,37	Garments	5,73
5	Electricity	4,45	Tourism	5,35	Garments	6,09	Rubber Products	4,87
6	Tourism	4,45	Electricity	4,84	Electricity	5,25	Electricity	4,58
7	Textile	3,32	Textile	4,18	Textile	4,13	Textile	3,60
8	Wood Products	2,86	Chemical	3,40	Paper Products	3,79	Paper Products	3,40
9	Paper Products	2,86	Paper Products	3,38	Food Product	2,99	Food Product	2,96
10	Chemical	2,69	Wood Products	3,08	Wood Products	2,81	Wood Products	2,27

Tourism in Indonesia

	2010	2011	2012	2013	2014
Tourism Contribution to GDP	4,80%	4,95%	5,10%	5,20%	5,25%
Employment (million people)	7,70	8,10	8,50	8,90	9,20
Investment	5,19%	5,45%	5,76%	6,06%	6,43%
International Tourist Arrivals (million people)	6,75	7,1	7,5	8,0	8,6
International Tourist Expenditure (USD milliar)	6,75	7,17	7,65	8,24	8,95
Domestic Tourist (trip)	230	237	245	258	276
Domestic Tourist Expenditure (Rp. trillion)	138,00	154,05	171,50	180,60	207,00

CLIMATE CHANGE and NATURAL DISASTER



Massive shift in community awareness

Star Agency Marketing Service

Saturday's biggest car market To sell your car call 13 25 35

drive

Go the green route

Find out how you can go green in the Greenest Car Market. Choose the best green car for your needs and budget. By RICHARD BLACKBURN

A lot of people are starting to think about the environment. They are looking for ways to reduce their carbon footprint. One of the easiest ways to do this is by driving a green car. There are many different types of green cars available, from small hatchbacks to large SUVs. Each car has its own set of features and benefits. For example, the Toyota Prius is a popular choice for its fuel efficiency and safety features. The Mercedes-Benz A-Class is another option, known for its compact size and advanced technology. The Fiat Punto is a small, affordable car that is also quite green. The Citroën C3 is a fun, sporty car that is also eco-friendly. The Alec Milden advertisement is also visible in the top right corner.

ALEC MILDEN
The Best Car
To Buy Now

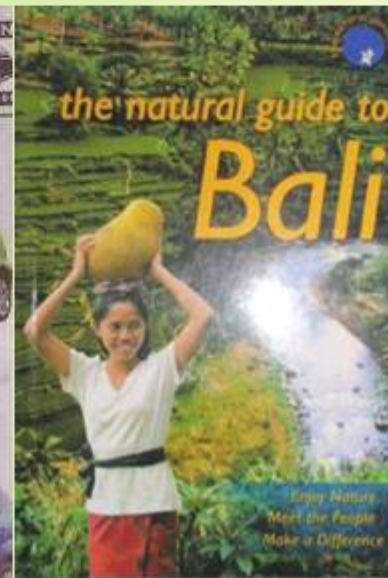
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TOYOTA PRIUS

FIAT PUNTO

CITROËN C3

MERCEDES-BENZ A-CLASS



Paradigm shift in Travelling

Growing demand for increased experiences and quality of the holidays



UK travellers

“83% - think holidays should not damage the environment.”

“77% - want holidays to experience local culture and foods.”

“54% - would like to know the social and environmental issue at destination level before booking the tour.

MARKET



MARKET PRESSURE

Demand for Community Involvement

Market demands business to provide product, which can benefit the local, allow tourists to interact with people, and give more experience.

Demand for Commitment on Environmental and Biodiversity Conservation

Market demands business to show commitment; which supports conservation and minimize destructive activities.

PRIVATE SECTOR

- Tour operator
- Accommodation management
- Attraction management

- Company commitment shown on Vision, Mission and Policy of the company.
- Implementing community friendly, environmentally friendly and Tourist Friendly Principles on management, tourist services and products.
- Implementing capacity building program for staffs.

COMMUNITY or CBO
NGO's
GOVERNMENT

Principles for Sustainable Tourism

Community Friendly

- Support local economies
- Respect and contribute to preservation of local cultures



Environmental Friendly

Minimize environmental impact
and contribute to conservation



Tourist friendly



Challenges and Opportunities

- Huge potential
- Huge Opportunities
- Market Opportunities

Indonesia should be able to develop variety of highly competitive tourism products



Opportunities

Indonesian Potential is highly suitable to be developed into competitive tourism products to answer the changing demand of tourism market.

Challenges

Providing sufficient and high quality human resources in tourism sectors.



Opportunities

In order to increase competitiveness and answering market demand, Indonesia has initiated several measures:

1. Declare 15 priority destination for improvement in destination management.
2. Develop new tourism products and packages suitable to answer market demand.
3. Develop standard of competency in tourism.
4. Support the establishment of Institution of Professional Certification in Tourism and Ecotourism
5. Encourage product certification

