

(3) The vicinity of Labuan city

The following rivers can be anticipated as water sources.

Cidangur river : The existing water supply facility from BPAM is available in the middle of the city. 20 lit/sec can be expected for the new development.

Cisata river : 1.3 m³/sec can be expected for new domestic use according to the Directorate General of Irrigation.

Cilemer river : 3.3 m³/sec can be expected for new domestic use.

(4) Southern part of Labuan

1.7 m³/sec can be expected for new domestic use from Ciseukeut river.

(5) Others (Krakatau, Ujung Kulon, etc.)

Boreholes should be exploited for a very limited quantities from pitched water tables.

2.4.4 Electricity

1) Organization

Electricity in the Republic of Indonesia is supplied by the PLN (Public Corporation of Electricity), which has responsibility for all phases of electricity supply activities covering generation, transmission, distribution and consumer services.

PLN has the following regional management system by Wilayah in Java.

- West Java Wilayah : No. XIV, Jakarta headquarters
- Central Java Wilayah : No. XIII, Sewarang headquarters
- East Java Wilayah : No. XII, Sulabaya headquarters

2) Existing Electrical Facilities

PLN supplies electricity to DKI Jakarta and the regional capital of Bandung from both hydropower and thermal power stations.

The principal power plants in West Java are the following:

- Cirata PLTA (Hydro power, 500 MW)
- Saguling PLTA (Hydro power, 700 MW)
- Suralaya PLTU (Thermal power, 3,100 MW in final output)

Suralaya PLTU located in the northern part of the promontory in Kab. Serang has been generating 800 MW with two sets of thermal generators consuming up to 170 tons of coal an hour since the end of 1985. The final output of Suralaya PLTU is expected to be 3,100 MW.

In addition to Suralaya PLTU, PT Kratatau steel power plant generates 150 MW in Cilegon Industrial Estate and small scale thermal generators for the rural area are being operated by PLN in the study region.

From Suralaya PLTU, an extra high voltage transmission line of 500 KV is connected directly to Gandul substation in the suburbs of Jakarta and to Kosambi substation in the centre of Jakarta via the Serang substation in order to supply of electricity to the capital.

Fig. 2-15 shows existing electrical facilities in the study region. Electricity, generated in Suralaya PLTU, is transmitted to the substations of Serang and Pandeglang and is transformed to a medium voltage of 20 kV or 6 kV. The medium voltage supplies are distributed within a radius of 40 km from these substations.

Labuan and Anyer cities receive electricity from Suralaya PLTU, but Carita is outside the radius of supply.

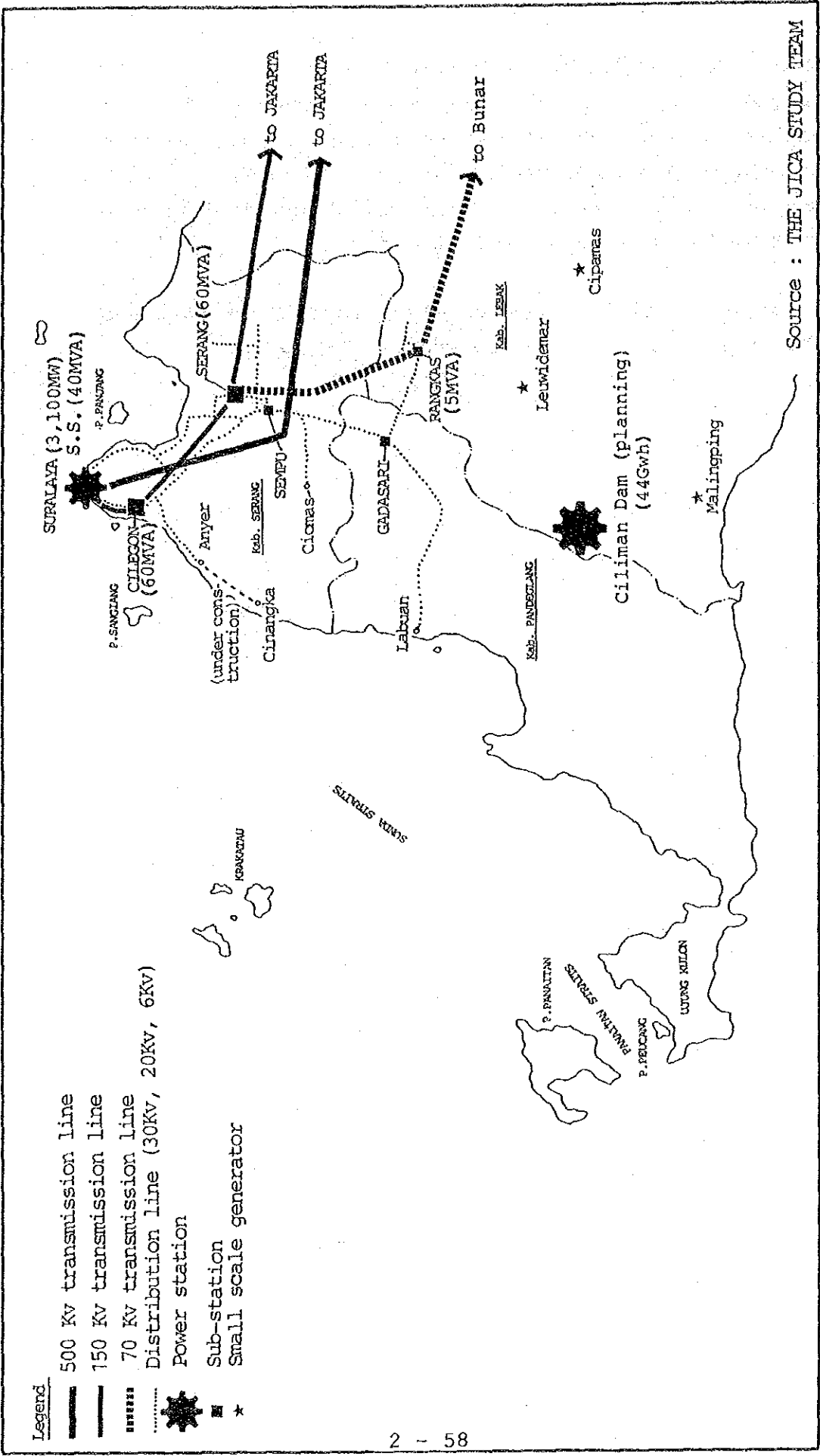


Fig. 2-15
PRESENT CONDITION OF THE ELECTRIC FACILITIES

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0 5 10 20 30 Km

Table 2-20 shows the number of customers and electricity consumption from PLN. 20,158 customers in Serang and 5,066 in Pandeglang account for only 7.9% and 3.1% respectively of the total households. The number of households using the electricity for lighting is still very small in the study region as shown in Table 2-21.

Table 2-20 NUMBER OF CUSTOMERS, ELECTRICITY CONSUMPTION SERVED BY PLN IN 1984/85

Kab.	No. of Customer	MWh	No. of Households	Ratio of diffusion (%)	MWh per Customer
Serang	20,518	45,683	260,604	7.9%	2.23
Pandeglang	5,066	4,411	162,062	3.1	0.87
Study region	25,584	50,094	422,666	6.1	1.96
West Java	918,460	1,809,334	6,570,519	14.0	1.97

Source: Data dan Statistik, 1984/85, PLN

Table 2-21 TYPE OF FUEL FOR LIGHTING BY HOUSEHOLD IN 1980

(Unit: %)

	Electricity	Pressure lamp	Kerosene	Others	Total
Kab. Serang	9.1	10.1	79.1	1.7	100.0
Kab. Pandeglang	3.3	6.2	89.7	0.8	100.0
West Java	13.9	12.0	72.9	1.2	100.0

Source: Penduduk Jawa Barat - Hasil Sensus Penduduk 1980
[Biro Pusat Statistik]

3) Future plan

PLN is planning to expand the capacity of the existing power stations, transmission lines and substations. Suralaya, Saguling and Cirata power station may be enlarged in the near future.

In the study region, there is a medium voltage transmission line construction project from Anyer to Cinangka [see Fig. 2-15] which is expected to be realized very soon.

2.4.5 Other infrastructures

1) Solid waste

Public services for solid waste disposal are only provided in Serang and Pandeglang cities. The Cilegon Industrial Estate has its own disposal system.

DPUK (Regional Public Works Service), the solid waste disposal authority in Serang collects 60 m³ of solid waste per day and disposes of this at a tip on the outskirts of the city, using six garbage trucks with a capacity of 4 m³ per each. 20% of the total garbage in Serang city is disposed of by DPUK.

DPUK handles also solid waste disposal in Pandeglang city. Four garbage trucks with the capacity of 4 m³ each collect every day approximately 10 m³ out of a total of 100 m³ solid waste generated in the city. The tip for the solid waste disposal is located in a field 7 km south-east from Pandeglang city.

Based on the accommodation survey conducted by JICA Study Team, Anyer Beach Hotel and Krakatau Beach Hotel have their own solid disposal tips adjacent to their sites.

2) Waste Water Treatment

There are no waste water treatment facilities even in the urban areas of the study region.

Septic tanks provide the only treatment, however the service ratio of septic tanks is no more than a few percent in West Java as shown in Table 2-22.

Even at first class hotels in Jakarta, waste water is treated by septic tanks.

Table 2-22 PRESENT CONDITION OF WASTE WATER TREATMENT

Kab.	Private toilets with septic tank	Private toilets without septic tank	Shared toilets & others	Total
Serang	14,352 (6.2%)	5,437 (2.4%)	211,233 (91.4%)	231,022 (100%)
Pandeglang	4,308 (3.0%)	3,820 (2.7%)	135,989 (94.3%)	104,117 (100%)
West Java	411,105 (6.7%)	443,162 (7.3%)	5,246,446 (86.0%)	6,100,713 (100%)

Source: Penduduk Jawa Barat - Hasil Sensus Penduduk 1980, Biro Pusat Statistik

2.5 Socio-Culture

2.5.1 Language

Indonesia is a country of tremendous diversity in term of culture and this has an important effect upon its socio-economic structure. Although there are many dialects used locally, the national language Bahasa Indonesian is spoken by the whole population.

2.5.2 Religion

There are five religions which are legally recognized in Indonesia, namely, Islam, Christian Protestant, Christian Catholic, Hindu and Buddhist. The religion of West Java Province is predominantly Islam, as well as that of the whole Indonesia.

The population by religion of West Java Province (in 1984) was: 1) Islam (98.06%), 2) Protestant (0.8%), 3) Catholic (0.44%), 4) Buddhist (0.48%), 5) Hindu (0.06%) and 6) Others (0.16%). The two Kab. of Serang and Pandeglang with 99% of its Moslem population indicates that the study region is one of the areas most influenced by Islam in Indonesia.

Each Kabupaten has its own informal leaders or heads of the Islamic organization of the area. They have great influence not only in religious matters but also in all kinds of matters related to the daily life of inhabitants. Although the informal leaders agreed to the needs of creating additional recreational activities in their regions, they will frown upon gambling and other promiscuous establishments.

Most families in the study region still follow traditional social customs (adat). In the transitional mutual aid "Gotong Royong" practiced in Indonesia, such custom is limited in the study region to the construction and repair of local public structures such as roads, bridges, mosque, etc. but this valuable system seems not yet to have been fully exploited for rural development.

About 64 km to the south-east of Rangkasbitung (just outside the study region), there is land reserved for Badui people who still follow their original way of life and do not accept any change or renovation from outsiders. Derived from the Pajajaran - the Hindu Kingdom in the area of Bogor today, Badui people settled there after Islam infiltrated into their kingdom.

2.5.3 Education

In West Java Province, as well as in the whole of Indonesia, the percentage of population 10 years old and over who are not being schooled continues to decline. Accordingly, the illiteracy rate of the population aged 10 years and over has decreased from 35% in 1971 to 8% in 1980. The rate of decrease in rural areas (from 38.08% to 28.54%) is higher than that of the urban areas (from 15.44% to 12.14%) in the same period.

The enrollment ratio in primary schools in the Province has increased from 55.63% in 1971 to 82.40% in 1980. The rate of children currently in elementary school in the region was 81.47% in 1980. This percentage is below than that of West Java Province (83.5%).

The illiterate ratio of the population (10 years old) in the study region accounted for 26.22% in 1980, while that of West Java Province was 24.98%. It is noticed that the illiterate ration is small in the urban area, as shown in percentage of Serang (8.18%) and Pandeglang.

This may suggest that the low education level in rural areas is basically due to family economic conditions which generally necessitate minimum expenditure on education and medical care.

2.5.4 Sanitation and health

The number of public (state and private) and maternity hospitals in West Java Province is 104 with a bed capacity of 10,301 in 1984. In the study region, there are 5 public and maternity hospitals. The total number of beds of those hospitals amount to 339, corresponding to 5,533 persons for one bed. It can be said that the number of health facilities and doctors are short in both Kabupatens, Serang and Pandeglang, and the uneven distribution of basic public services favors urban dwellers.

The morbidity rate in West Java Province was 5.7% and this figure was more than 4.08% of Java Island and 4.1% of the national level. Regarding infant mortality, the situation is much better than that in the preceding decade. The infant mortality rate per 1,000 persons in West Java Province decreased from 158.90 in 1971 to 130.5 in 1980. This figure in 1980 is nevertheless higher than the average of Jakarta (80.85) and the whole Indonesia (108).

2.6 Land Use and Land Tenure System

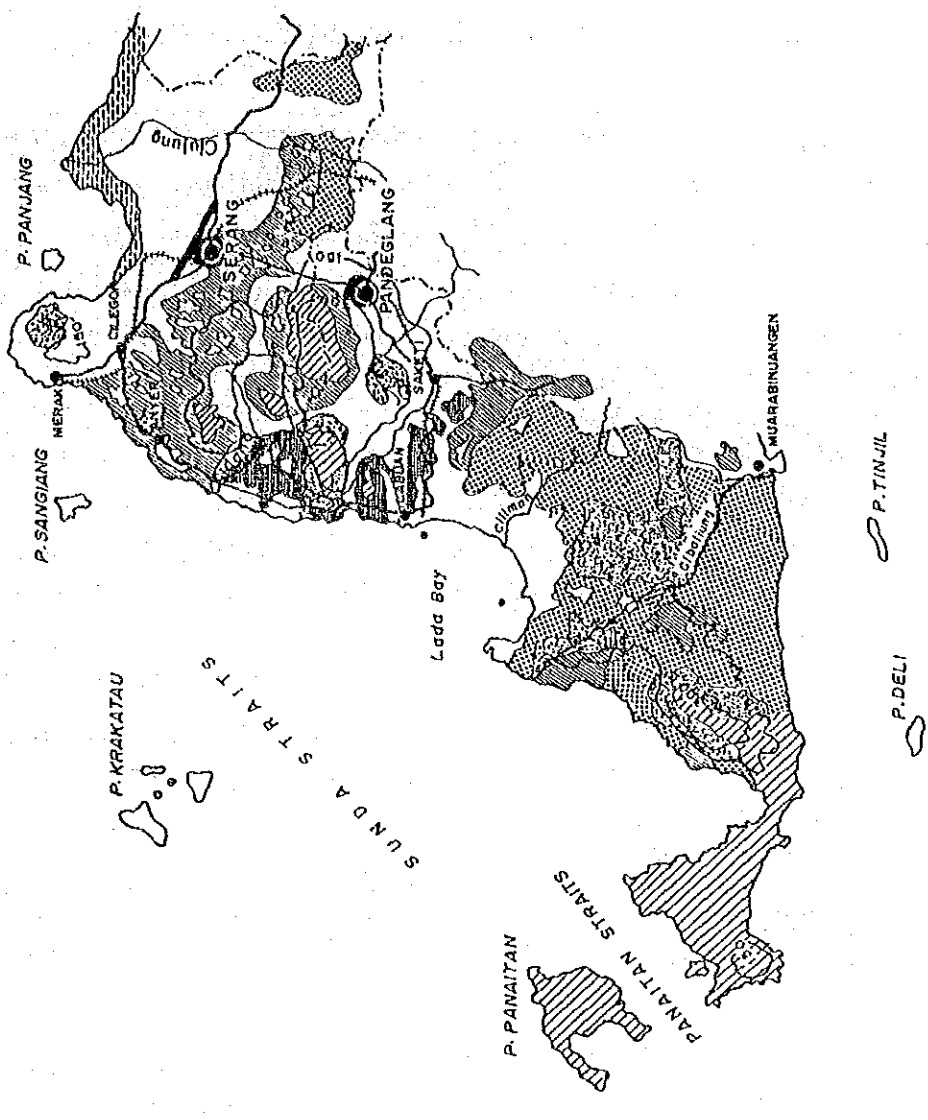
2.6.1 Land use

A distinct difference in land use appears between the two Kabupatens of Serang and Pandeglang in the study region. Reflecting the uneven population distribution and socio-economic activities of the region, the share of lands for agricultural, residence and construction uses in Kab. Serang accounts for 70% of its total area, whereas more than 40% of lands in Kab. Pandeglang are covered with forests, plantations and grass land [see Fig. 2-16].

A total of 2,477 km² (54.7%) out of 4,520 km² of the study region is used for agricultural purpose at present. They comprise 673.4 km² (14.9%) of irrigated paddy fields, 426.6 km² (9.4%) of upland and mixed crops fields, 141.1 km² (3.1%) of plantations. The land use patterns in Kab. Serang and Pandeglang are shown in Table 2-23.

Legend :

- Dense forest
- Bush forest
- Mixed plantation
- Rice field
- Swamp, fish pond, etc.
- Dry field
- Residence area
- Plantation



Source : BAPPEDA Tk. I, Jawa Barat, 1982



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Fig. 2-16
 PRESENT LAND USE OF THE STUDY
 REGION

Scale : 1 / 1,000,000

0 10 30 50 Km

N

Table 2-23 LAND USE OF THE STUDY REGION

Land Use	Kab. Serang km ² (%)		Kab. Pandeglang km ² (%)		Study Region km ² (%)	
- Irrigated paddy field	381.2	(20.3)	292.2	(11.2)	673.4	(14.9)
- Rain-fed paddy field	240.3	(12.8)	186.3	(7.2)	426.6	(9.4)
- Arable land	675.4	(36.0)	560.9	(21.5)	1,236.3	(27.3)
- Plantation	8.0	(0.4)	133.1	(5.1)	141.1	(3.1)
- Residence and construction area	246.5	(13.1)	109.3	(4.2)	355.8	(7.9)
- Grass Land	9.6	(0.5)	113.2	(4.3)	122.3	(2.7)
- Forests	83.1	(4.4)	845.3	(32.4)	928.4	(20.6)
- Others	231.9	(12.5)	368.7	(14.1)	635.6/1	(14.1)
Total	1,876.0	(100.0)	2,609.0	(100.0)	4,519.5	(100.0)

Remarks: /1 Krakatau Islands (35 km²) are included in "Others".

Source: Kabupaten Daerah Tingkat II Serang dalam Tiga Pelita, Pamerintah Kab. Daerah Tingkat II Serang, 1985; Penjelasan Bupati Kepala Daerah Tingkat II Pandeglang, Menganai Penyelenggaraan Pemerintah dan Pembangunan di Kab. Dabi II sampai Tahun III Pelita IV, Pamerintah Kab. Daerah Tingkat II Pandeglang, 1986.

The northern parts of the region along the coast are mostly covered with swamps and used as fish ponds (hatcheries). The dense forest and bush areas are located in the mountainous areas and in the western parts of the region.

The northern and central plain areas are used for rice cultivation and scattered rice field areas are seen in the mixed plantation areas in the northern part of the region. Other land used for mixed plantations are located in the central and southern parts of the region.

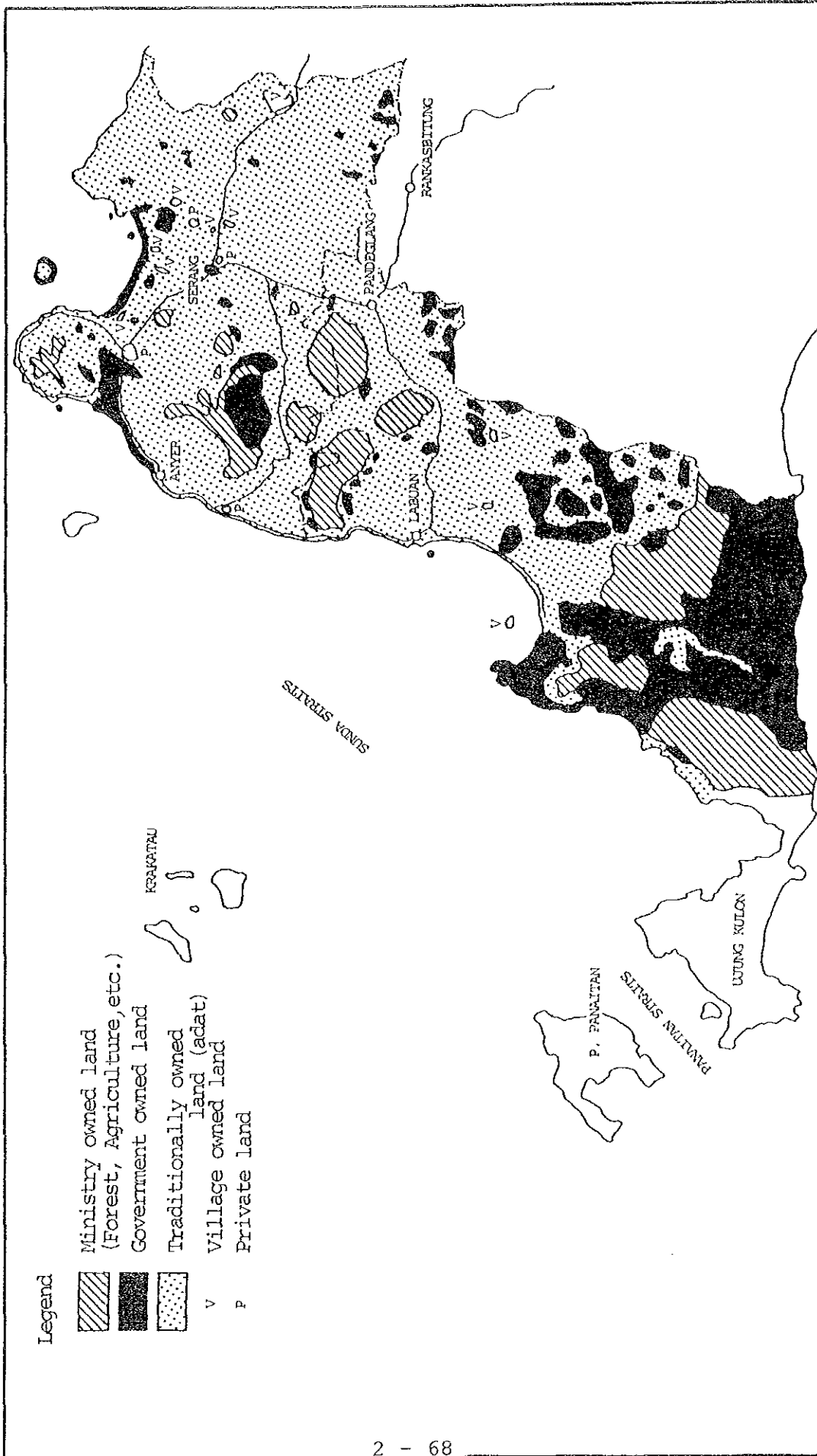
Land in the central west parts of the region are used for plantations. Unirrigated fields are located in the hilly areas in the southern and northern parts of the region.

2.6.2 Land tenure system

The land tenure system in the study region is regulated by the Agrarian Law (1960) and the Adat Law (traditional law) whenever the latter does not contradict with the Agrarian Law [see Fig. 2-17].

Under the Agrarian Law, the rights of land ownership and land utilization are clearly defined in 8 categories. They involve the rights of ownership, of exploitation, of building, of use, of lease, of opening up land, of collecting forest products, and of managing land. The last one, the right to manage land (Hak Pengelolaan) is basically owned by government authorities.

The rights of use of water, fishing and space are also defined in the existing Agrarian Law.



Sources : Peta Status Tanah, 1:25,000
 Sub Direktorat Tata Guna Tanah;
 Direktorat Agraria Propinsi Jawa Barat, 1977

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Fig. 2-17 PRESENT LAND TENURE

CHAPTER 3

CONDITIONS OF TOURISM

CHAPTER 3 CONDITIONS OF TOURISM

3.1 Tourism in ASEAN Countries

3.1.1 International tourist destination

Generally speaking, the main international tourist destinations in ASEAN Countries, as shown in Table 3-1 and Fig. 3-1, may be classified into the following groups:

- Seaside resorts for marine sports and recuperation,
- Highland resorts for a variety of recreations and recuperation,
- City resorts for sightseeing and shopping, and
- Historic or cultural resorts for sightseeing.

1) Seaside resorts

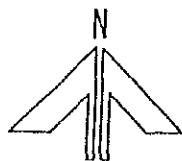
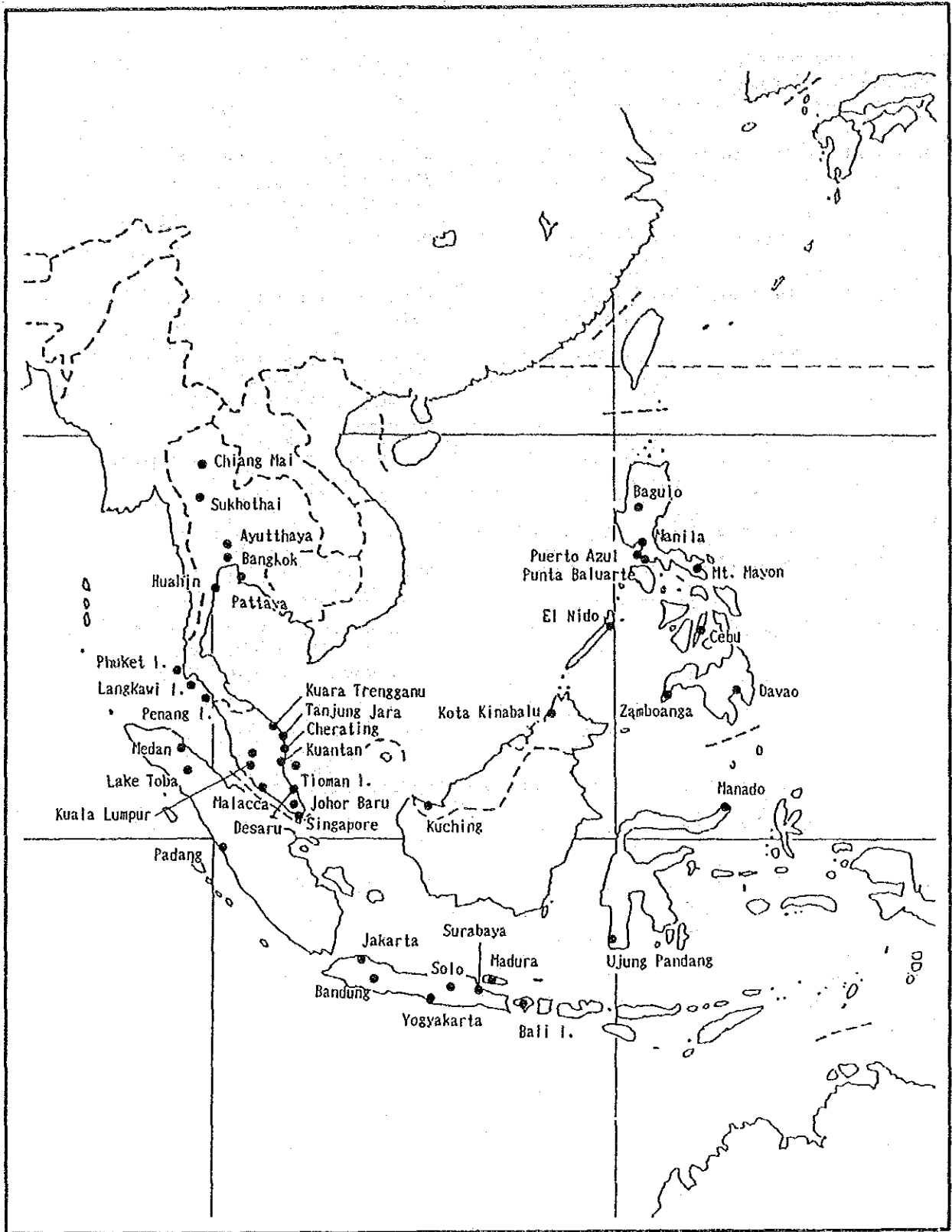
Tourism at seaside resorts is now booming in ASEAN Countries and new ones are being developed every year.

This type of resorts was originally based solely on natural resources such as a white fine sandy beach, clean sea, lovely surroundings etc., but recently a variety of modern facilities have been introduced for a comfortable stay and the diversification of recreation activities, in addition to the above resources. Thus human-made facilities can supplement the quality of the natural resources as seen in the Nusa Dua development, although at great capital expense.

Table 3-1 MAJOR TOURIST DESTINATIONS IN ASEAN
OTHER THAN INDONESIA

Nation	Place	Type	Remarks
Malaysia	Langkawi	Seaside Resort	Beach, Cruising, Legend, Nature
	Penang Is.	Seaside Resort	Beach, Marine Sports Facilities, Botanical Garden, Temples
	Kuala Lumpur	City Resort	Remarkable Superstructures (Mosques, Monuments, Palace, etc.), Cuisine, Shopping
	Malacca	Historical Resort	Historical Assets (Churches, Ruins of Chinese Temples, Dutch Fortress, etc.), Shopping
	Johor Baharu	City Resort	Islamic Palace & Mosque, Ethnic Entertainment, Park
	Port Dickson	Seaside Resort	Beach
	Tanjung Jara	Seaside Resort	Beach (on development)
	Cherating Beach	Seaside Resort	Mediterranean Club
	Kuantan	Seaside Resort	Beach (on development)
	Tioman Is.	Seaside Resort	Beach
	Dasaru	Seaside Resort	Beach
	Kota Kinabalu	City Resort (Gateway)	Beach, Mountain (Mt. Kinabalu)
Kuching	City Resort	Old Colonial Buildings, Longhouse	
Singapore	Singapore	City Resort, Gateway	Remarkable Superstructures (Parks, Palaces, Churches, Mosques, etc.) Orchid Garden, Island, Ethnic Culture, Cuisine, Shopping

Nation	Place	Type	Remarks
Thailand	Chiang Mai	Historic Resort	Remarkable Superstructures (Palaces, Temples), Old Chiang Mai, Shopping
	Sukhothai	Historic Resort	Museum, Temples
	Ayutthaya	Historical Resort	Ruins of Temples, Summer Palace
	Bangkok	City Resort, Gateway	Remarkable superstructures (Palace, Temples), Rose Garden, Floating Market, Cuisine, Shopping
	Pattaya	Seaside Resort	Beach, Marine Sports, Cuisine
	Chaam	Seaside Resort	Beach, Marine Sports
	Hua Hin	Seaside Resort	Beach, Marine Sports
	Phuket Is.	Seaside Resort	Beach, Marine Sports
Philippines	Manila	City Resort, Gateway	Remarkable Superstructures (Palace, Churches, Ruins of Fortress), Culture, Cuisine, Shopping
	Baguio	Highland Resort	Parks, Museum, Golf Course
	Puerto Azul	Seaside Resort	Sports Facilities on Shore
	Punta Baluarte	Seaside Resort	Sports Facilities on & off Shore
	El Nido	Seaside Resort	Marine Sports Facilities
	Mt. Mayan	Highland Resort	Observatory
	Cebu	Seaside Resort	Beach, Marine Sports Facilities
	Zamboanga	City Resort, Gateway	Islamic Mosque, Down Town, Island
	Davao	City Resort	Ethnic Culture, Pearl Farm, Sea Garden



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Fig. 3-1

MAIN TOURIST DESTINATIONS IN ASEAN

However, in such Pacific Islands as Guam, Saipan, Pulau Islands in Micronesia and Melanesia, where natural conditions for a seaside resort are more prevalent than in ASEAN countries, a fairly large number of seaside resorts are being planned for development. In this context, the danger of over-supply of such resorts for international tourism has to be carefully taken into consideration in the future.

2) Highland resorts

As a highland resort requires a cool climate as well as a plateau with natural beauty and comfortable accommodation as well as various recreation facilities, the number of this type of resort in ASEAN Countries is rather small.

Representative highland resorts in ASEAN are:

- Lake Toba, Bukittinggi, Puncak (Indonesia),
- Fraser's Hill, Genting Highland (Malaysia), and
- Baguio (Philippines).

3) City resorts

Cities have a variety of attractions and assets such as famous monuments, modern buildings, interesting exhibition facilities, exciting markets, lovely parks, nice restaurants, etc., as well as historic relics. Therefore, tourists can enjoy sightseeing, cuisine, shopping, recreation and so on in a city.

Furthermore, most of such cities function as a gateway to the surrounding region and tourists stop by to get information for their tours and arrangements for transportation.

Capital cities such as Bangkok, Singapore, Manila and Jakarta, and some other large cities with international airports, such as Davao, Medan etc. are in this category.

4) Historic or cultural resorts

In addition to the above-mentioned types of resorts, other types of tourist destinations can be found in ASEAN countries.

Representatives of such types are historic or cultural resorts such as:

- Yogyakarta (Indonesia), and
- Chiang Mai (Thailand).

This type of resort has its own historic and cultural assets accumulated over many years, although there may be few city attractions as aforementioned. Such resorts, however, are decreasing in number and losing their attractions because of city development.

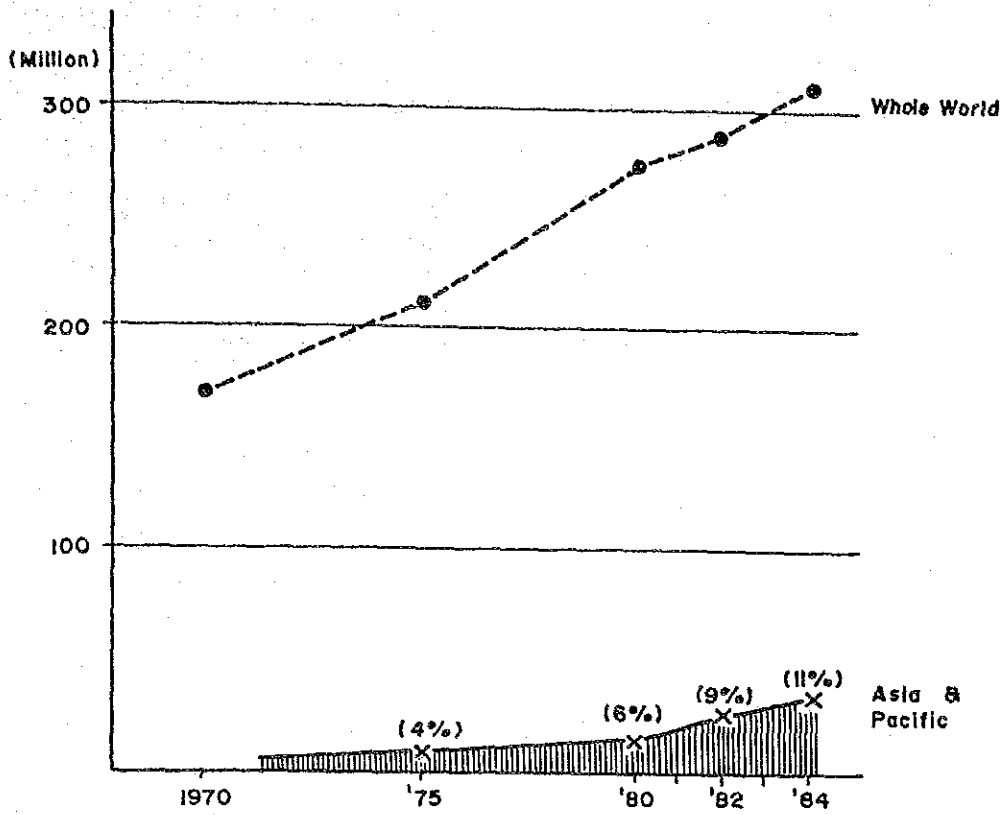
In summary, development of seaside resorts has recently been the focus of attention rather than improvement of city resorts, and historic or cultural resorts are less conspicuous.

It is suggested, however, that in the future greater emphasis be put on improvement of cities in order to attract visitors for sightseeing purposes which will constitute a fairly large part of international tourism. In addition, such destinations reflect the image and reputation of the whole country which may influence tourism in other types of resorts.

3.1.2 Trend of tourism

During the past 15 years, the number of international tourists world-wide has been continually increasing, but the rate of growth has recently been leveling off [see Fig. 3-2].

Fig. 3-2 NUMBER OF INTERNATIONAL TOURISTS

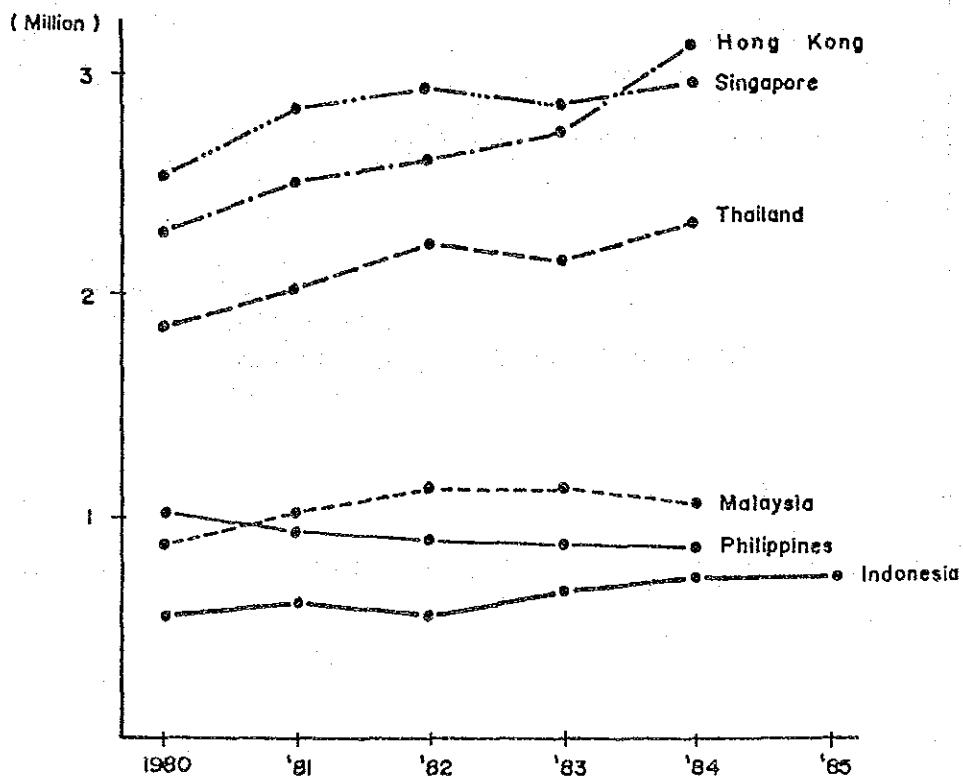


Source: Ministry of Transport (Japan) through data from WTO

In 1984, the total number of international tourists world-wide reached more than 300 million, and total tourist expenditures in the world exceeded 100 billion dollars (US).

According to the data on world tourism, the most noticeable zone for growth is Asia and the Pacific. As shown in Fig. 3-2, the proportion of Asia and the Pacific in number of tourist arrivals to the whole world grew from 4% in 1974 to over 11% in 1984. The number of visitor arrivals in ASEAN countries in the last 5 years are shown in Fig. 3-3.

Fig. 3-3 NUMBER OF VISITOR ARRIVALS



Source: PATA Annual Statistical Report '84

According to these data, Asian countries can be classified into two groups. One is the rather well established group, attracting already a large number of visitors, which is still increasing. Singapore and Thailand belong to this groups. Hongkong, a neighboring ASEAN territory, has a similar trend to this group and passed Singapore in 1984 to exceed 3 million arrivals in a year.

This other is the developing group, to which Malaysia, the Philippines, and Indonesia belong. Amongst the countries in this group, the Philippines shows a decline to 900,000 visitor arrivals, though it had more than one million in 1980.

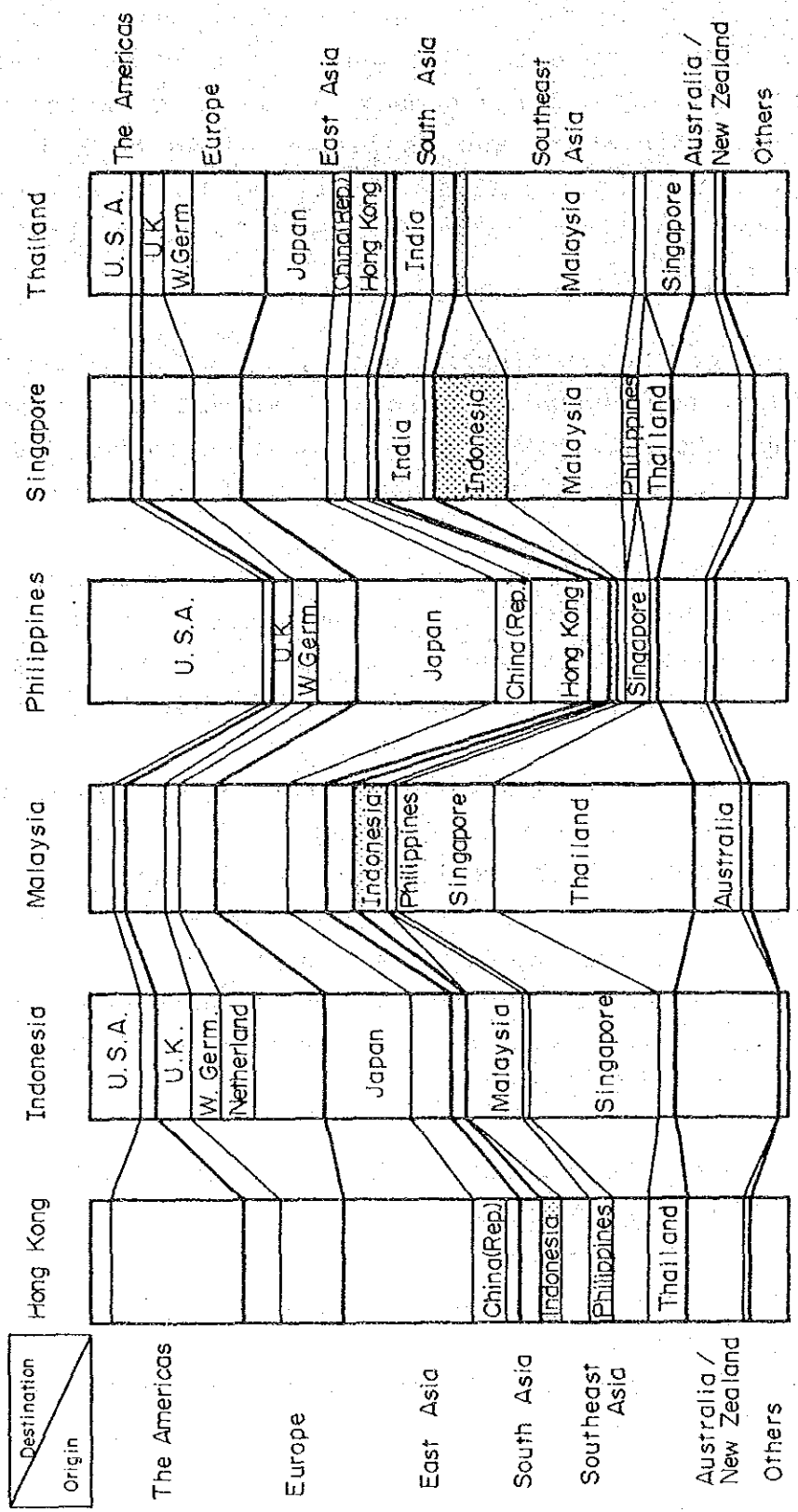
From the number of visitor arrivals in each country, it would seem that this factor may be influenced by the distance between the destination country and tourist market, as well as by the quality of tourist resources and facilities.

As shown in Fig. 3-4, the most dominant visitors by place of residence are those from neighboring countries. For example, the Philippines, which is located in the northern part of ASEAN countries, attracts the largest number of visitors from East ASEAN countries, while other countries attract visitors from South East Asia. Indonesia, the southern most country in ASEAN, attracts a fairly large number of visitors from Australia and New Zealand.

Other noticeable tendencies of international tourism shown in the statistics are as follows:

- There is much difference among countries in the average length of stay. The Indonesia datum of about 10 days is ranked in the middle class in the PATA area [see Table 3-2].

Fig. 3-4 VISITOR ARRIVALS BY RESIDENCE (%)



Source: PATA ANNUAL STATISTICAL REPORT '84

Table 3-2 AVERAGE LENGTH OF STAY IN 1984 & 1985

	1984	1985
EAST ASIA		
REPUBLIC OF CHINA	6.35	6.51 (nights)
HONG KONG	3.62 (nights)	3.55 (nights)
JAPAN	11.1 (a)	11.4
KOREA	5.8	6.4
MACAU (b)	1.33	1.42
SOUTH ASIA		
INDIA	-	29.8
PAKISTAN	26.0	N/A
SRI LANKA	8.9	9.2
SOUTHEAST ASIA		
INDONESIA (c)	10.6 (nights)	10.9 (nights)
PHILIPPINES (d)	8.22	9.08
SINGAPORE	3.6	3.5
THAILAND	5.47	5.58
AUSTRALIA/NEW ZEALAND		
NEW ZEALAND	26.0 (e)	20 (f)
SOUTH/CENTRAL PACIFIC		
AMERICAN SAMOA (g)	7.0	8.09
COOK ISLANDS	10.0	10
FIJI	-	8.3
GUAM (h)	3-6 (night)	3-6 (nights)
NEW CALEDONIA	12.6	11.4
NORTHERN MARIANAS	3	4.5
SOLOMON ISLANDS	-	12
TAHITI	7.56	7.69
TONGA	7.2	9.7 (heights)
VANUATU (i)	-	11
HAWAII (j)	10.5 (westbound)	10.2

Remarks:

Methods Used in Estimating Average Length of Stay

Sample Survey

Hong Kong, Pakistan, Guam, Hawaii, Northern Marianas

E/D Cards (matching arrival and departure cards)

Rep. of China, Sri Lanka, Philippines, Singapore, Thailand, New Zealand, Cook Islands, Solomon Islands, Tahiti, Tonga, New Caledonia and Vanuatu

- (a) Based on statistical report of ministry of Justice averaged from data showing less than 6 months' stay.
- (b) Length of stay derived from data provided by deluxe and first-class hotels and pousadas.
- (c) Calculated using visitor embarkation cards departing through three main gates (Jakarta, Bali, Medan).
- (d) Includes air visitors only.
- (e) Year ended 31 March 1984.
- (f) Intended length of stay as given on arrival card.
- (g) Randomly sampled monthly.
- (h) Voluntary survey form attached to E/D card.
- (i) Total number of days stated on arrival cards divided by number of visitors stating length of stay.
- (j) Inflight questionnaire.

Source: PATA Annual Statistical Report, 1986.

- The average daily expenditure in 1984 ranged from 26 to 200 dollars (US). Countries with high expenditures such as Hong Kong and Guam are widely known for their shopping attractions [see Table 3-3].
- The difference in the average hotel occupancy rate is not as much as in visitor expenditures [see Table 3-4]. Hong Kong and Guam are rather highly ranked.

Table 3-3 VISITOR EXPENDITURES/1

Unit: US Dollars

	Total (Thousand)		Average Expenditure per Visitor		Average Daily Expenditure	
	1983	1984	1983	1984	1983	1984
East Asia						
China, Rep. of	990,000	1,066,000	679.53	702.82	105.19	110.58
Hong Kong	1,575,579	1,799,024	542.00	552.00	150.00	152.00
Japan	835,000	970,000	-	-	-	-
Korea	506,245	673,355	499.00	-	64.00	-
South Asia						
Pakistan	201,600	177,900	552.20	437.00	32.50	26.00
Sri Lanka	126,856	104,932	361.00	330.00	38.00	37.00
South East Asia						
Thailand	1,089,140	1,155,000	N/A	492.00	N/A	90.00
Australia/ New Zealand						
New Zealand	236,865	308,616	-	-	-	-
South/Central Pacific						
Guam	210,324	219,000	600.00	-	200.00	200.00
Tahiti	74,981	72,2687	550.67	567.00	66.67	75.00
Tonga	5,735	5,535	288.25	307.62	48.04	42.73
Hawaii	4,026,575	4,582,122	-	-	-	89.86

Remark: /1 No data of Indonesia

Source: PATA Annual Statistical Report, 1984.

Table 3-4 AVERAGE HOTEL OCCUPANCY RATE, 1983 & 1984/1

	1983		1984	
	Number of Rooms (As at 31 Dec.)	Occupancy Rate (%)	Number of Rooms (As at 31 Dec.)	Occupancy Rate (%)
East Asia				
China,				
Rep. of	22,336	57.7	22,582	59.6
Hong Kong	17,518	83.0	17,979	89.0
Korea	22,233	58.0	19,592	59.0
Macau	2,208	53.8	2,636	61.44(a)
South Asia				
India	13,758	67.3	31,402	65.5
Pakistan	18,326	N/A	26,538	-
Sri Lanka	8,852	35.9	9,627	35.6
Southeast Asia				
Philippines	13,227(b)	56.9(c)	10,052(d)	55.32(d)
Singapore	14,468	75.5	16,440	75.5
Thailand(e)	12,806	N/A	18,906	N/A
Australia/ New Zealand				
Australia	31,800	49.6	-	-
New Zealand	11,461(f)	53.5(g)	19,931	57.0(h)
South/Central Pacific				
American Samoa	200	40.0	216	45.0
Cook Islands	N/A	60.0	223	-
Fiji	2,890	56.9	-	-
Guam	2,751	87.0	3,018	86.0
Tahiti	1,841	65.9	2,107	61.84
Tonga	148	42.7	-	39.9
Hawaii	62,448	69.7	-	76.0

Remark: /1 No data of Indonesia.

Source: PATA Annual Statistical Report, 1984.

3.2 Tourism in Indonesia

3.2.1 Trends in tourism

1) Trends of tourist destinations

(1) Overall tourism

a. Annual visitor arrivals in major tourist destinations and objects

According to the available data the following tendency can be observed as shown in Table 3-5.

- The annual number of visitors in remote area and country-side resorts ranges from some hundred thousand to some one million, while the number in large cities such as Jakarta may vary from some millions to 10 million.

Table 3-5 ANNUAL NUMBER OF VISITORS TO MAJOR TOURIST OBJECTS

(1,000 persons)

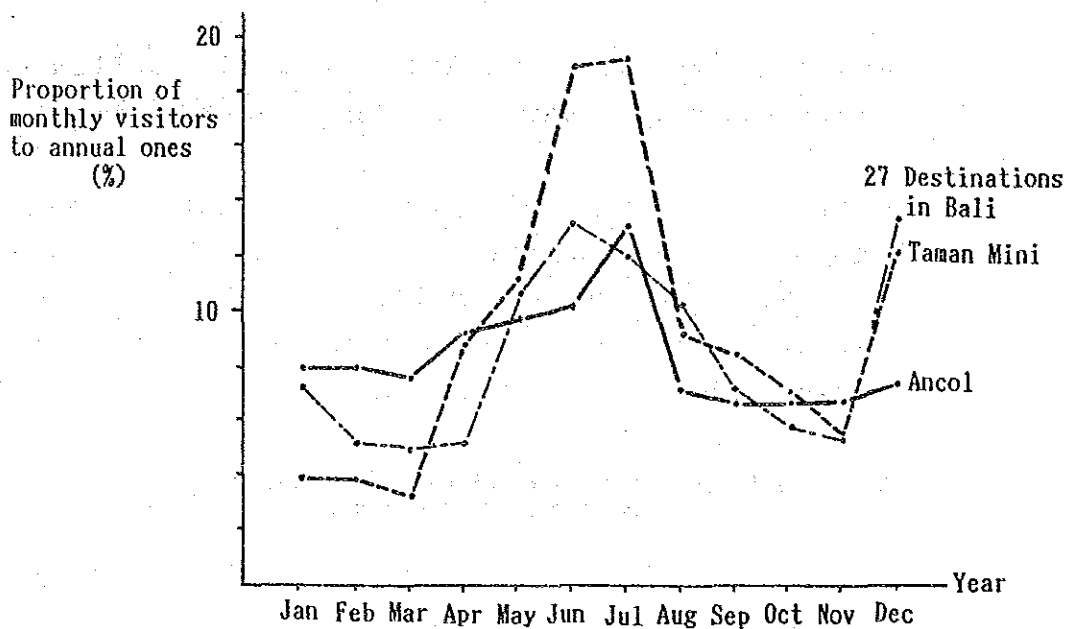
Tourist objects	1981	1982	1983	1984	1985
Bali (27 objects)	527	1,248	1,131	1,261	1,521
Borobudur	859	935	1,029	1,133	1,247
Prambanan	368	398	443	495	558
Safari Park					(480)
Bogor Botanical Garden		2,799	3,083	4,494	4,590
Taman Mini					538
Taman Ancol		10,224	10,439	10,777	9,794

Sources: Diparda Tk.I Bali; Kanwil Pariwisata DI Yogyakarta, Administration and Public Relation Dept. of Borobudur Office; Perhimpunan Usaha Taman Rekreasi Indonesia; and JICA Study Team Survey (Safari Park, April '86 to March 1987).

b. Monthly and daily fluctuation of visitor arrivals

Although seasonal fluctuation of visitor arrivals is, in general, comparatively small, it can be said that January to March and September to November are off-season and May to August and December are high season.

Fig. 3-5 EXAMPLE OF SEASONAL FLUCTUATION IN TOURIST OBJECTS



Daily fluctuation of visitor arrivals is also rather small, as seen in Table 3-6. This is advantageous for operation and management of tourist facilities.

Table 3-6 DAILY PEAK RATIO OF VISITOR ARRIVALS
TO ANNUAL ONES IN MAJOR TOURIST
OBJECTS

(%)

Tourist objects	1984		1985	
	DPR	IPR	DRP	IPR
Ancol	1.10	-	1.08	52.3
Taman Mini	-	-	2.18	70.0 /1
Taman Safari	-	-	(1.25	40.0) /1
Bogor Botanical Garden			(2.74	60.0)

Remarks: DPR: Daily peak of visitor arrivals/Annual ones
IPR: Instantaneous peak of visitor arrivals/daily ones
/1 Ratios in 1986.

Source: Interview survey by JICA Study Team

(2) Proportion of Indonesian and foreign tourists

Although there is no national data on the proportion of some Indonesian and foreign tourists, the following information provide same indication.

- According to statistics on the number of visitor arrivals in West Java prepared by DGT, domestic visitors are believed to form around 97% of the total [see Table 3-7].
- Domestic visitors accounted for 98.5%, 98.0%, and 93.0% of the total visitors to Ragunan Zoo, Safari Park and Borobudur in 1985 respectively, and 53.2% and 38.0% at 72 tourist objects and overall classified hotels in Bali respectively.^{/*}

^{/*} Sources: JICA Study Team survey (Ragunan and Safari);
Kanwil Pariwisata DI Yogyakarta; and
Kiparda Tk. I Bali.

Table 3-7 NUMBER OF VISITOR ARRIVALS
IN WEST JAVA BY CATEGORY

Category	1,000 persons (%)					
	1980	1981	1982	1983	1984	1985
Domestic visitors (Proportion)	8,789 (99.3)	8,926 (99.1)	6,833 (98.9)	8,348 (97.4)	8,731 (97.0)	7,487 (96.5)
Foreign visitors (Proportion)	65 (0.7)	77 (0.9)	75 (1.1)	226 (2.6)	268 (3.0)	270 (3.5)
Total	8,854	9,003	6,908	8,574	8,999	7,757

Source: DGT

2) Trends in tourism

(1) Indonesian tourists

Although foreign residents, according to the definition provided by Indonesian Steering Committee, are classified as domestic tourists, their tourism will be examined together with foreign tourists in this section because of the nature of the available data.

Based on the survey on domestic tourism in 1984 by BPS ("Survei Wisatawan Domestik"), the trends in Indonesian tourism can be summarized as follows:

a. Participation in tourism

Over a period of three months, 3.1% of all Indonesian tourists participated in visits to tourist objects, while 9% made travels including visits to other than tourist objects.

A breakdown of the above participants in visits to tourist objects is shown in Table 3-8.

Table 3-8 PROPORTION OF DOMESTIC PARTICIPANTS IN VACATION AND RECREATION TRAVEL BY CATEGORY

(%)

Residence/ Sex Age	City			Village			Total		
	M	F	M&F	M	F	M&F	M	F	M&F
<10	3.4	3.5	6.9	5.4	4.1	9.5	8.8	7.6	16.4
10-14	3.0	3.1	6.1	5.6	5.2	10.8	8.6	8.3	16.9
15-24	8.3	6.4	14.7	10.7	7.5	18.2	19.0	13.9	32.9
25-49	7.1	5.9	13.0	10.3	6.0	16.3	17.4	11.9	29.3
>49	0.8	0.6	1.4	1.8	1.3	3.1	2.6	1.9	4.5
TOTAL	22.6	19.5	42.1	33.8	24.1	57.9	54.4	43.6	100.0

Remarks: M = Male F = Female

Source: Survey on domestic tourism, 1984, BPS

Order of per capita participation ratio by main Province is as follows (refer to Table 3-9):

DI Yogyakarta (8.3%), DKI Jakarta (5.3%), West Java (5.3%), Bali (4.1%) West Sumatra (3.9%).

Table 3-9 PARTICIPATION RATIO IN TRAVELS TO TOURIST OBJECTS DURING 3 MONTHS IN 1984

(1,000 persons, %)

Province	Population	No. of Participants	Participation ratio
North Sumatra	9,037	284	3.14
West Sumatra	3,583	140	3.91
DKI Jakarta	7,309	390	5.34
West Java	29,653	1,560	5.26
Central Java	26,480	432	1.63
DI Yogyakarta	2,895	239	8.26
East Java	30,444	914	3.00
Bali	2,585	106	4.10
North Sulawesi	2,277	38	1.67
South Sulawesi	6,426	100	1.56

Source: Survey on domestic tourism, 1984, BPS

b. Frequency of tours

The average number of travels per person is 1.25 per 6 months and is differentiated in proportion to household expenditures as shown in Table 3-10.

Table 3-10 AVERAGE NUMBER OF TRAVELS PER PERSON DURING 6 MONTHS IN 1984

Household expenditure (RP. 1,000)	Average number of travels	Vacation & recreation
Under 20.0	1.20	0.73
20.0 - 39.9	1.21	0.66
40.0 - 74.9	1.24	0.87
75.0 -149.9	1.27	0.40
Over 150.0	1.30	1.03
Total	1.25	0.86

Source: Survey on domestic tourism, 1984, BPS

c. Motivation

The primary travel motivation is visiting friends and relatives (42.1% of all travels) followed by vacation and recreation (23.5%), and business (11.9%).

Table 3-11 NUMBER OF TRAVELS BY MAIN MOTIVATION DURING 6 MONTHS IN 1984

								Thousand (%)
Vacation/ Recreation	Business	Educational	Health	Pilgrimage	Visiting Friend/ Relatives	Art/ Sport	Others	Total
8,524 (23.5)	4,304 (11.9)	762 (2.1)	538 (1.5)	2,564 (7.1)	15,270 (42.2)	272 (0.8)	3,914 (10.98)	36,148 (100.0)

Source: Survey on domestic tourists in 1984, BPS.

d. Length of stay

Regarding the length of stay for vacation and recreation, one day travel occupies more than 90%, while more than 8 nights does 1% as shown Table 3-12.

Table 3-12 NUMBER OF TRAVELS BY LENGTH OF STAY
DURING 6 MONTHS IN 1984

	Vacation/Recreation		Whole Travels	
< 1 Night	8,020	(94.1)	26,872	(74.3)
1 - 3	336	(3.9)	5,212	(14.4)
4 - 7	102	(1.2)	1,732	(4.8)
8 - 14	36	(0.4)	888	(2.5)
15 - 20	16	(0.2)	776	(2.1)
21 - 30	14	(0.2)	668	(1.8)
31 ≤	-	-	-	-
Total	8,524	(100.0)	36,148	(100.0)

Source: Survey on domestic tourists in 1984, BPS.

e. Places for visiting (Tourist objects)

People more often visit tourist objects (57%) than others (43%) during their travels. Among tourist objects, beaches are the most popular (16%) followed by recreation parks (10.3%) as shown in Table 3-13.

Table 3-13 PLACES FOR VISITING

(%)

Tourist Objects		Tourist Objects	
Beaches	16.0	Cultural parks	0.2
Lakes	2.6	Traditional ceremonies	2.2
Water reservoirs	1.2	Art performances	0.5
Caves	0.6	Recreation parks	10.3
Tourist parks	4.5	Zoos	5.6
National parks	0.8	Camping grounds	1.0
Sea gardens	0.1	Others	3.2
Historic remains	7.6	Sub total	57.0
Museums	0.7	Other than tour object	43.0
		Total	100.0

Source: Survey on domestic tourism, 1984, PBS

The average number of places visiting during one travel for vacation and recreation purpose is approximately 1.3.

f. Occasion of travel

Most of vacation and recreation travels are made on holidays and paid holidays (58.1%), and weekends (21.8%), while 20% is done on weekdays.

g. Mode of transportation

Primary mode of transportation for vacation and recreation travel is vehicles comprising public cars (62.5%) and private cars (17.8%).

Table 3-14 NUMBER OF TRAVELS ON VACATION AND RECREATION
BY MODE OF TRANSPORTATION DURING 6 MONTHS IN
1984

Mode of Transport	Thousand (%)			
	Vacation		Whole Travels	
Air Transport	82	(1.0)	484	(1.3)
Sea Transport	54	(0.6)	1,124	(3.1)
River/Lake	42	(0.5)	548	(1.5)
Train	212	(2.5)	1,634	(4.5)
Public Car /1	5,326	(62.5)	26,228	(72.6)
Private Car	1,516	(17.8)	3,248	(9.0)
Others	1,292	(15.2)	2,882	(8.0)
Total	8,524	(100.0)	36,148	(100.0)

Remark: /1 Including official car

Source: Survey on domestic tourist 1984, BPS.

h. Travelling companies

Most of people travel for vacation and recreation in small groups consisting of family or family and someone (55.6%) and someone other than family members (39%).

i. Type of accommodation

The primary type of accommodation for overnight travel is self owned houses and relative's houses (59.1%). The share of hotels, inns and guest houses, and rental rooms are rather minor (12.1% and 3.5% respectively).

Table 3-15 TYPE OF ACCOMMODATION FOR OVERNIGHT TRAVEL TO TOURIST OBJECTS

(%)

Type of accommodation	Frequency
Hotel/inn/guest house	12.1
Rental room /*	3.5
Camping ground	8.5
Self owned house/relative's house	59.1
Others	16.8
Total	100.0

Source: Survey on domestic tourism, 1984, BPS

j. Origin and destination

For vacation and recreation travels, West Java and East Java are major generation and destination provinces, while DKI Jakarta is rather minor due to the exclusion of daily intensive inner-city travels from the objects of survey [See Table 3-16].

Table 3-16 NUMBER OF TRAVELS ON VACATION AND RECREATION BY PROVINCE OF ORIGIN

	1,000 persons, (%)	
North Sumatra	554	(6.5)
West Sumatra	324	(3.8)
DKI Jakarta	688	(8.1)
West Java	2,060	(24.2)
Central Java	784	(9.2)
DI Yogyakarta	552	(6.5)
East Java	1,892	(22.2)
Bali	214	(2.5)
North Sulawesi	56	(0.7)
South Sulawesi	180	(2.1)
Sub Total of 10 provinces	7,304	(85.7)
Sub Total of 17 provinces	1,220	(14.3)
Grand Total	8,524	(100.0)

Source: Survey on domestic tourists in 1984, BPS.

As for the relation between original and destination in overall travels, the most intensive flow can be seen within the province of West Java (18.5% of all visits) and within the province of East Java (17.6%) as shown in Table 3-17.

Table 3-17 MAJOR FLOW OF OVERALL DOMESTIC TRAVELS BETWEEN
ORIGIN AND DESTINATION BY PROVINCE

(Proportion to overall visitors, %)

Destination Origin	North Sumatra	West Sumatra	South Sumatra	DKI Jakarta	West Java	Central Java	East Java	South Sulawesi
N. Sumatra	5.1							
W. Sumatra		2.7						
S. Sumatra			2.5					
DKI Jakarta				1.4	2.3			
W. Java				5.6	18.5			
C. Java				2.4		7.1		
E. Java							17.6	
S. Sulawesi								3.7

Source: Survey on domestic tourism, 1984, BPS

(2) Foreigner

The trends in foreigners' tourism is not clear because of the lack of data.

Therefore, JICA Study Team carried out a questionnaire survey on foreigners' tourism comprising foreign residents and foreign tourists in Bali, Bandung, Jakarta, Yogyakarta, the study region (Salira beach, Merak beach, Anyer beach, Karang Bolong and Old Banten).

Furthermore, the Study Team extended the questionnaire survey to Japanese residents in Jakarta to supplement the above destination side survey.

Based on the results of these surveys and the statistics on incoming foreign tourists provided by DGT, the following trends can be observed:

a. Frequency of travels

a) The number of incoming foreign tourists

As stated in 3.2, the number of incoming foreign tourists has been increasing rapidly in recent years and it is expected to exceed one million persons in 1987 (refer to Fig. 3-3). The annual growth rate has been 4.5% during the 5 years of 1981 to 1985 and will jump up to more than 20% between 1986 to 1987.

b) Number of travels of foreign residents per annum

The number of travels of a foreign resident per annum, according to the above surveys, was found to be as follows:

- Foreign residents as the respondents of the above questionnaire survey: 4.2 times, and
- Japanese residents in Jakarta: 4.3 times.

These figures are not standard because of the specific samples. The study team figured out the frequency of travels, based on the following logical calculation, as 0.35 times per person.

$$(NFT + PFR \times ANT) \times ANV \times SWF/TDW = RFV/RDV$$

where:

- NFT: No. of foreign tourists (701,000:DGT)
 PFR: No. of foreign residents (920,000)
 ANT: Average No. of trips to tourists objects per annum
 ANV: Average No. of visits per trip (1.3)
 SWF: Share of West Java in number of foreign visitors (0.196:DGT)
 TDW: Total domestic visitors in West Java (7,132,000:BPS)
 RFV: Ratio of foreign visitors in West Java (3.5%DGT)
 RDV: Ratio of domestic visitors in West Java (96.5%DGT)

$$\therefore ANT = 0.35$$

b. Nationality

Singapore, Australia and Japan are the major generation countries and form more than 40% of all foreign tourists in 1984 respectively as shown in Table 3-18.

Table 3-18 DOMINANT NATIONALITIES OF FOREIGN TOURISTS

Nationality	%			
	1980	1981	1983	1984
Singapore	10.9	11.6	14.9	14.4
Japan	11.0	11.1	13.3	13.2
Malaysia	7.5	7.4	8.1	8.9
Other Asia	8.0	6.2	6.7	7.2
Australia	14.6	15.8	13.1	13.6
Europe	33.4	33.9	30.4	29.6
The Americas	12.1	11.5	11.1	10.4
Others	2.5	2.5	2.4	2.7
Total	100.0	100.0	100.0	100.0

Source: Annual Statistical Report, PATA.

On the other hand, according to the aforementioned questionnaire survey, the following facts emerged about the main 6 destinations including Bali, Jakarta, Yogyakarta, etc.

- More than 50% of all respondents were Europeans while Australians are predominated in Bali.
- The fact that more than one-third of visitors to the study region were Japanese and North Americans. A large proportion of them were business-oriented.

c. Other attributes of tourists

a) Age groups

The predominant age group accounting for 70.5% was 20 to 49 years old [see Table 3-19] of whom 50.9% were incoming foreign tourists and 64.9% were visitors to the 6 destinations.

b) Sex

The visitors were more than 60% of male both for incoming foreigners and visitors to the 6 destinations.

e. Characteristics of behavior

a) Purpose of visits

Pleasure oriented travels, as a whole, formed more than 60% of all in both cases of incoming foreigners and the visitors to the 6 destinations (74.4% and 62.7% respectively) including the travels for the purpose of business and pleasure (less than 10% in both cases).

b) Length of stay

Incoming foreigners, on average, stay days, while visitors to the 6 destinations stay 4.6 days and Japanese residents 2.7 days per visit.

Table 3-19 AGE GROUP OF FOREIGNERS

1) Incoming foreign tourists (1984)

(%)

>20	20-29	30-39	40-49	50-59	60≥	Unknown	Total
9.1	24.0	26.9	19.6	12.0	8.3	0.1	100.0

Source: DGT.

2) Foreign visitors in 5 destinations

(%)

Age Group	Bali	Bandung	Jakarta	Study Region	Yogyakarta	Row Total
≤19	3.8	-	1.9	-	0.9	1.8
20 - 29	46.7	44.0	26.6	26.2	49.3	36.7
30 - 39	25.4	30.4	29.5	33.1	24.5	28.2
40 - 49	12.2	18.4	23.2	20.9	13.1	18.1
50 - 59	6.4	7.2	10.4	12.8	7.4	9.0
60 ≤	5.5	-	8.4	7.0	4.8	6.2
Column Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Questionnaire survey on foreign visitors in 5 destinations, 1986, JICA Study Team

Table 3-20 PURPOSE OF VISIT OF FOREIGN VISITORS

1) Incoming foreign tourists (1984)

Purpose of Visit	(%)
Holiday	69.0
Business	14.8
Business & Pleasure	5.4
Mission & Convention	2.2
Others	4.8
Undeclared	3.8
Total	100.0

Source: DGT

2) Foreign visitors in 5 destinations

(%)

Purpose	Bali	Bandung	Jakarta	Study Region	Yogyakarta	Row Total
Business	4.1	13.1	31.1	59.5	7.7	21.5
Pleasure	84.7	55.1	36.9	19.0	71.3	54.9
Business+Pleasure	3.8	13.1	11.0	0.6	4.4	7.8
Visiting Family	2.2	3.7	5.7	4.1	5.0	4.3
Leisure+Family	3.8	15.0	12.1	5.8	8.8	9.0
Others	1.6	0	3.1	5.0	2.8	2.5
Column Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Questionnaire survey on foreign visitors in 5 destinations, 1986, JICA Study Team

c) Destinations

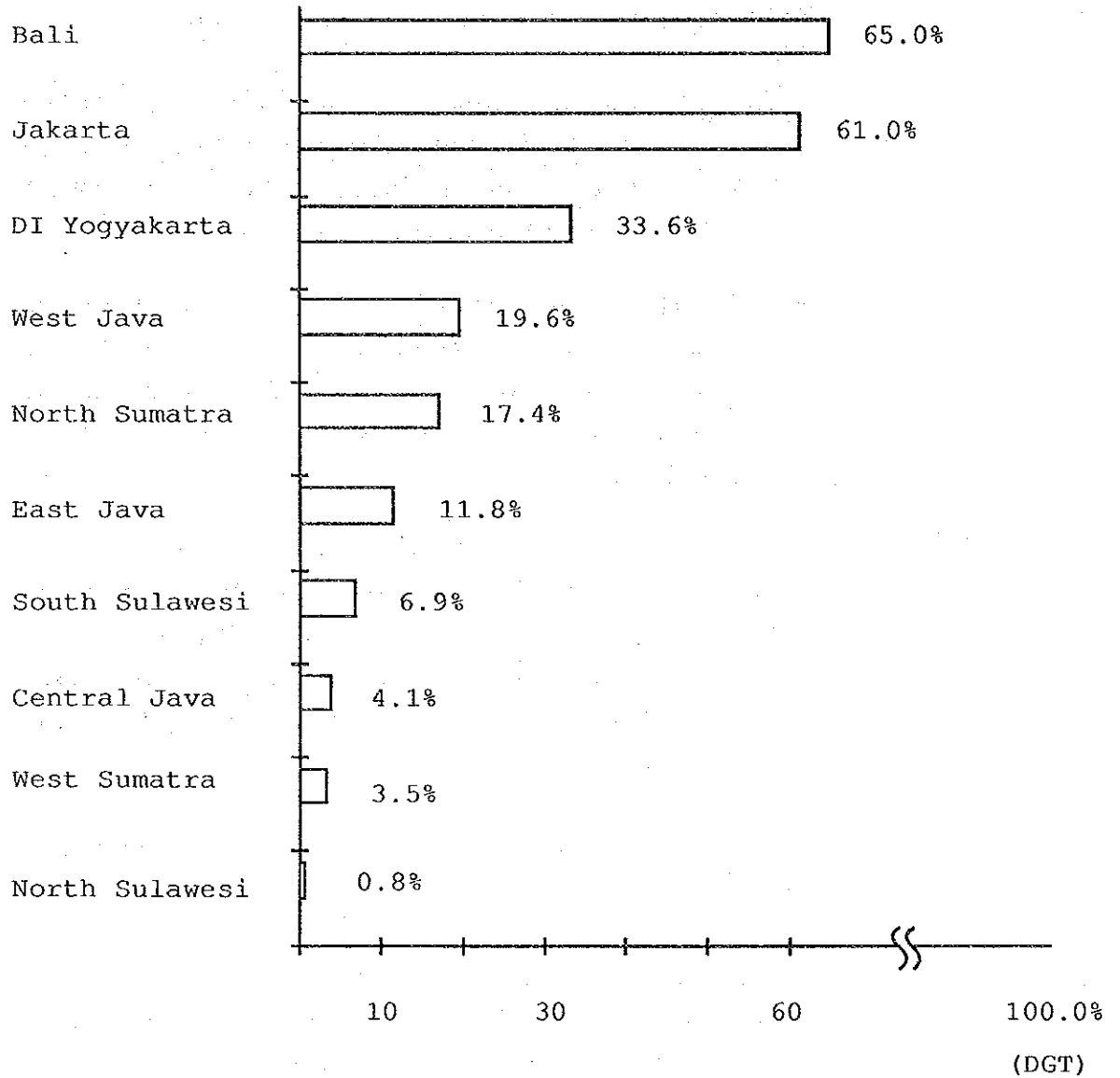
Although the overall trends are not clear because of the limitation of data, the following information presents its outline.

- The ratios of incoming foreigners visiting Bali, Jakarta, DI Yogyakarta and West Java to the total were 65.0%, 61.6%, 33.6% and 19.6% in 1981 respectively [see Fig. 3-6].
- Principal destinations for foreigners visiting the 6 destinations were Bali, Jakarta and Yogyakarta and followed by Eastern West Java and Sumatra [see Table 3-21].
- Bali, Pulau Seribu and Yogyakarta are the three principal destinations for Japanese residents. 50.8%, 42.1% and 35.7% of all visited the above destinations in year 1985 respectively, while about 20% visited the study region.

d) Stopover countries of incoming foreign tourists

- Generally, Singapore is the primary stopover country for foreign tourists before and after visiting Indonesia, and Thailand is secondary.
- Concerning stopover countries on pleasure trips, Malaysia, Hong Kong and Australia are the countries next to Singapore and Thailand [see Table 3-22].

Fig. 3-6 RATIO OF INCOMING FOREIGN TOURISTS FOR 10 PROVINCES (1985)



Source: DGT

Table 3-21 MAJOR DESTINATIONS OF FOREIGN VISITORS

1) Whole foreigners

Place	Percentage
Anyer	0.6
Carita	1.9
Bali	72.6
Irian Jaya	0.7
Java Island	6.3
Western West Java	3.1
Eastern West Java	28.7
Jakarta	42.6
Central Java	11.2
East Java	10.0
Kalimantan	2.2
Lampung	0.6
Nusa Tenggara	5.4
Sulawesi	5.8
Sumatra	17.2
Yogyakarta	38.4
Others	3.2

2) Foreign residents

Place	Percentage
Bali	66.7
Irian Jaya	4.4
Java	2.2
Western West Java	8.9
Eastern West Java	42.2
Jakarta	42.2
Central Java	13.3
East Java	13.3
Kalimantan	4.4
Lampung	2.2
Nusa Tenggara	8.9
Sulawesi	20.0
Sumatra	24.4
Yogyakarta	46.7
Total	299.8

Source: Questionnaire survey on foreign visitors in 5 destinations, 1986, JICA Study Team

Table 3-22 STOPOVER COUNTRIES ON TRIPS OF INCOMING FOREIGN TOURISTS VISITING 5 DESTINATIONS

(%)

	Aus- tral- ia	Eu- rope	North Amer- ica	Hong Kong	Japan	Malay- sia	Philip- pines	Singa- pore	Thai- land	Other Coun- tries	Row Total
Business	6.8	10.3	2.6	15.1	4.3	7.4	5.4	28.5	6.3	13.4	100
Pleasure	10.0	6.4	3.5	9.4	3.0	11.9	2.9	22.6	18.2	12.3	100
Business +Pleasure	4.7	5.8	2.1	12.0	4.2	11.0	3.7	29.8	14.7	12.0	100
Family	15.9	20.5	2.3	2.3	4.5	2.3	0	31.8	15.9	4.5	100
Pleasure +Family	10.9	3.9	6.3	5.5	6.3	14.1	1.6	35.9	10.9	4.7	100
Others	3.3	10.0	3.3	5.0	6.7	10.0	1.7	30.0	15.0	15.0	100
Column Total	8.8	7.4	3.3	10.2	3.8	10.7	3.3	26.0	14.8	11.8	100

Source: Questionnaire survey on foreign visitors in 5 destinations, 1986, JICA Study Team

3.2.2 Tourist destinations

The Republic of Indonesia is rich in diversified tourist resources comprising beaches, sea gardens, highlands, historic monuments, cuisines and cultures.

Therefore, tourist destinations are scattered all over the country ranging from Sumatra to Irian Jaya. They may be profiled as follows [refer to Annex I(D), Chapter 1 for their detail]:

1) Java Island

(1) Jakarta and West Java

Although Jakarta possesses historic assets and urban objects such as Ancol and Taman Mini and attracts a large number of domestic people, it is business

oriented destination, as far as international tourism is concerned.

However, recently, active movement can be seen in the development of international hotels and Pulau Seribu, and it is expected to become the gateway of international tourism, if further developments are promoted not only in Jakarta but also in its surrounding area.

Puncak and Bogor are outstanding tourist destinations for both domestic people and foreigners in West Java. They are facing the difficulties, however, of overuse and traffic jams especially at weekends and holidays. Therefore, alternative destinations need to be developed.

Although there are other destinations such as Bandung, Cirebon and Pelabuhan Ratu in West Java, attention should be paid to the study region and the eastern area of Jakarta such as Jatiluhur area because of the completion or extension of highways.

(2) Central Java

Yogyakarta and Prambanan are the representative tourist sites in the province. Furthermore, there are several well-known destinations such as Dieng Plateau, Baturaden and Surakarta.

(3) East Java

East Java abounds in diverse tourist attractions such as temples, beaches, mountains and highlands, and nature reserves. Madura, Malang, Mt. Bromo and Sarangan are well-known destinations, while Surabaya is the gateway city to the Province.

(4) Bali Island

Bali is an internationally known tourist destination and attracts foreigners as well as a domestic people because of its variety of attractions comprising beaches, mountains, temples, ethnic performances, handicrafts, etc.

In addition, it plays an important role as gateway to the eastern islands such as Nusa Tenggara Islands.

(5) Sumatra Island

North Sumatra and West Sumatra are prominent destinations with unique natural features such as lakes and volcanoes as well as interesting towns such as Medan and Padang.

(6) Sulawesi Island

Sulawesi has recently come to tourists' notice and is expected to be one of the representative destinations in Indonesia in future. Historic and cultural assets in South Sulawesi and the natural beauty of the sea are notable attractions of the island.

(7) Other islands

In addition to the above-mentioned destinations, there are many attractive islands with sea gardens, other natural beauties, unique wild life, ethnic performances and handicrafts.

Although tourism is not so prevalent mainly due to inconvenience of access, specific tourism is expected to be promoted in some of the above islands.

3.2.3 Tourist facilities and services

1) Accommodation

The accommodation offered by Indonesian hotels in 24 Provinces in 1985, which are classified in accordance with Department of Communication No. PM 10/PW.301/Phb-77, is shown in Table 3-24.

From these data, the total number of hotels in Indonesia is 275 classified hotels with 21,677 rooms and 1,346 non-classified hotels with 32,268 rooms.

Java Island has roughly 16% of the national total, while Bali has 10%.

Furthermore, based on the data recently prepared by DGT, there were 367 classified hotels with 27,656 rooms in Indonesia in 1986 and 94% of the total rooms are situated in 10 Provinces. The number of hotel rooms in Indonesia has been increasing at an annual growth rate of 6.8% between 1980 and 1986.

According to the DGT Hotel Directory, there were 1,346 unclassified hotels with 32,268 rooms in Indonesia in 1985, which implies that in 1985 the proportion of classified hotels to unclassified ones was 1:5 in number of hotels and 1:1.5 in number of rooms.

From the results of the questionnaire survey by the JICA Study Team and other information, the average occupancy rate of several hotels in Jakarta and Bali was found to be as follows:

- 39.1% in Jakarta in 1985
- 31.1% in Bali in 1985

However, more successful performances in the above places were recorded in "Asia Travel Trade" as shown in Table 3-23.

Table 3-23 HOTEL PERFORMANCE (OCCUPANCY RATE)
IN JAKARTA AND BALI

(Unit: %)

Place	1982	1983	1984
Jakarta			
Borobudur	88	82	
Hilton	87	85	
Sari Pacific	89	84	
Indonesia	72	64	70
Bali			
Bali Beach	64	58	61
Nusa Dua Beach		41	63
Pertamina Cot.		56	61
Sanur Beach		59	64

Source: "Asia Travel Trade"

Table 3-24 HOTELS IN 24 PROVINCES IN 1985

Provinces	Classified		Non-classified	
	Hotels	Rooms	Hotels	Rooms
North Sumatra	23	1,679	14	606
West Sumatra	10	377	26	563
DKI Jakarta	45	8,204	39	1,737
West Java	49	2,921	227	5,211
Central Java	23	1,148	261	4,845
DI Yogyakarta	8	735	36	941
East Java	24	1,411	148	4,465
Bali	28	2,912	107	3,253
North Sulawesi	6	220	22	313
South Sulawesi	19	624	57	1,039
South Sumatra	6	405	53	1,251
Lampung	2	102	12	302
West Nusa Tenggara	5	98	23	382
East Nusa Tenggara	1	25	33	511
Aceh	2	52	19	565
Bengkulu	1	21	29	614
South Kalimantan	4	115	31	804
East Kalimantan	6	212	54	1,674
West Kalimantan	1	83	12	589
Central Kalimantan	-	-	29	530
Central Sulawesi	2	30	30	534
Southeast Sulawesi	1	26	11	98
Maluku	5	124	23	322
Riau	3	114	26	565
Jambi	1	39	7	194
Irian Jaya	-	-	17	460
Total:	275	21,677	1,346	32,368

Source: Indonesia Hotel Directory, 1985/86, DGT

On the basis of the available data and field survey, it can be said that accommodation is fairly well developed in the major tourist destination regions, but the high class hotels are concentrated in Jakarta while there are less high class hotels in other regions [see Tables 3-25 and 3-26 for accommodation other than hotels].

The reservation system of classified hotels has been improved in major tourist destination regions, while it is less convenient in other cases.

2) Restaurant and catering

The most serious problem in tourism regarding cuisine is the scarcity of suitable restaurants for international tourists in the local cities and towns, but the recent efforts to construct new ones and present the variety of good Indonesian cuisine to tourists will help to improve the above situation.

The present situation of restaurants in 24 Provinces in 1984 is shown in Table 3-27.

3) Souvenirs

A large number of souvenir shops can be seen at all tourist destinations but most of these are just small stalls.

One of the most important tasks in souvenir sales is to train the vendors and control such small stalls at tourist destinations to make a better impression on tourists.

Furthermore, it is necessary to develop more attractive souvenir items with local or traditional characteristics by utilizing traditional skills and materials.

Table 3-25 TOTAL INNS IN 7 PROVINCES IN 1984

No.	Province	Total Inns	Total Rooms
1.	North Sulawesi	56	585
2.	Riau	41	976
3.	West Sumatra	41	910
4.	Lampung	7	171
5.	North Sumatra	48	895
6.	West Java	129	3,213
7.	East Kalimantan	39	882
Total		361	7,993

Source: Tourism in Indonesia 1984, DGT

Table 3-26 TOTAL YOUTH HOSTELS IN 1984

No.	Province	Youth Hostels	Rooms	Beds	1983 Data
1.	West Sumatra	1	12.40	10,000	7,500
2.	West Java	2	52.00	860	22,312
3.	Central Java	12	45.51	32,000	49,203
4.	Yogyakarta Special Territory	22	66.23	64,452	22,315
5.	East Java	10	102.00	33,350	118,535
Total:		47	278.14	140,662	219,865

Source: Tourism in Indonesia 1984, DGT

Table 3-27 RESTAURANTS IN 24 PROVINCES

Provinces	1984	
	Total Restaurants	Seat Capacity
<u>A. 10 Destinations</u>		
DKI Jakarta	70	12,061
West Java	615	21,179
DI Yogyakarta	13	1,349
Central Java	355	21,927
East Java	124	12,814
Bali	99	3,064
North Sumatra	18	2,905
West Sumatra	10	927
North Sulawesi	86	4,466
South Sulawesi	30	2,806
Total A:	1,420	83,498
<u>B. Other Provinces</u>		
Riau	6	752
South Sumatra	-	-
Jambi	10	316
Lampung	8	436
West Nusa Tenggara	51	1,547
East Nusa Tenggara	3	201
Maluku	-	-
Irian Jaya	-	-
West Kalimantan	10	62
East Kalimantan	32	1,556
Aceh Special Territory	27	1,301
South Kalimantan	5	3,300
Central Sulawesi	40	1,051
East Timor	2	100
Total: B	194	10,622
Total A + B:	1,614	94,120

Source: Tourism in Indonesia 1984, DGT

4) Recreation and amusement centres

Recreation and amusement centres, according to the regulation concerned, are classified into the following categories;

Recreation

- Recreation parks
- Swimming pools
- Natural bathing spots
- Zoos

Amusement

- Night clubs
- Discotheques and bars

Table 3-28 NUMBER OF RECREATION AND AMUSEMENT PLACES IN 8 PROVINCES, 1984

Provinces	Places of Recreation & Amusement
North Sumatra	12
West Sumatra	6
DI Yogyakarta	19
Bali	18
North Sulawesi	13
Riau	3
South Kalimantan	2
West Nusa Tenggara	2
Total:	75

Source: Tourism Indonesia 1984, DGT

5) Tourist transportation

As for tourist transportation, road transportation by vehicles is dominant with cruising for off-shore excursions. Chartered flights are less active.

The vehicles for tourist road transportation in 12 Provinces in 1984, according to the statistical data of DGT, comprise 578 buses, 557 micro buses and 316 sedans, 61% of them belonging to the private sector, 36% to public travel bureaux and 3% to the government. All can be easily chartered at the main tourist destinations. It, however, is necessary to develop a limousine service between airports and cities and to train drivers to speak a foreign language for further promotion of international tourism.

6) Tour supporting services

In order to cope with increasing tourists, tour support services such as travel bureaux, tour leaders and tour guides have been developed.

Total travel bureaux in 1984, comprising public travel bureaux (PTB), branches of public travel bureaux (BPTB) and travel agents (TA) amounted to 449 as shown in Table 3-29.

The number of tour leaders who are employees of travel bureaux with the ability to lead and arrange tours, and tour guides in 1984 are reported to be 342 and 1,440 persons respectively in 10 Provinces [see Table 3-30].

7) Others

Although the formalities for entry into Indonesia are much improved, custom's procedures still need to be made more simple.

Table 3-29 TRAVEL BUREAUX IN INDONESIA IN 1984

	PTB	BPTB	TA	Total
A. 10 Destinations				
1. North Sumatra	11	7	12	30
2. West Sumatra	4	6	5	15
3. Jakarta Metropolitan	73	29	15	117
4. West Java	9	10	4	23
5. Central Java	10	4	1	15
6. Yogyakarta Special Territory	6	9	3	18
7. East Java	18	11	13	42
8. Bali	18	10	1	29
9. South Sulawesi	5	6	10	21
10. North Sulawesi	7	-	5	12
Total A:	161	92	69	322
B. Outside 10 Destinations				
11. Aceh Special Territory	1	-	4	5
12. Riau	3	2	7	12
13. Jambi	-	-	4	4
14. Bengkulu	-	-	1	1
15. Lampung	2	-	2	4
16. West Kalimantan	5	2	-	7
17. South Sumatra	3	1	7	11
18. South Kalimantan	6	2	9	17
19. East Kalimantan	5	6	10	21
20. Central Kalimantan	1	1	4	6
21. N.T.B.	2	-	2	4
22. N.T.T.	3	1	3	7
23. Central Sulawesi	4	1	6	11
24. Southeast Sulawesi	1	-	1	2
25. Maluku	1	1	5	7
26. Irian Jaya	3	2	5	10
27. East Timor	-	-	-	-
Total B:	40	19	70	129
Total A + B:	209	111	139	451

Remarks: PTB: Public Travel Bureau
 BPTB: Branch of Public Travel Bureau
 TA: Travel Agent

Source: Tourism in Indonesia, 1984, DGT

Table 3-30 NUMBER OF TOUR LEADERS AND TOUR GUIDES
BY PROVINCE, 1984

	Tour Leaders	Tour Guide
North Sumatra	41	98
West Sumatra	23	7
DKI Jakarta	129	251
West Java	23	36
Central Java	14	250
DI Yogyakarta	9	109
East Java	49	49
Bali	32	496
North Sulawesi	13	47
South Sulawesi	9	47
Sub-Total of 10 provinces	342	1,440
Sub-Total of 17 provinces	24	115
Grand Total	366	1,555

Source: Tourism in Indonesia, 1984, DGT

3.3 Tourism in the Study Region

3.3.1 Trends in tourism

As seen in Table 3-31, the study region attracted some one million visitors in 1985. The number fluctuates from 1.0 to 1.9 million according to year (1980 - 1985).

However, the following tendency can be clearly observed:

- Old Banten, comprising an Islamic Mosque, Chinese Temple, Dutch fortress, man-made lake, etc., is the greatest tourist destination in the study region with one million of annual visitors.
- In addition to Old Banten, Salira beach and Karang Bolong in the study region have about one hundred thousand annual visitors.
- The study region, as a whole, has tended to attract domestic tourists who form 97 to 99% of all visitors. Foreign visitors are concentrated at Anyer Beach and Carita Beach.

In addition, based on information from the concerned agencies and the observation at site, it is pointed out that the predominant tourist activity is visits to holy places such as Old Banten accompanied with picnics afterwards at beach-side recreation parks.

Table 3-32 shows the proportion of visitors by activity assumed by JICA Study Team through arranging yearly fluctuated data by averaging two of extremes and classifying tourists by activity.

Table 3-31 NUMBER OF VISITOR ARRIVALS IN
THE STUDY REGION BY DESTINATION

(1,000 Persons)

	1980		1981		1982		1983		1984		1985	
	F	D	F	D	F	D	F	D	F	D	F	D
Old Banten	1	<u>1,696</u>	2	1,138	-	1,540	x	x	-	<u>688</u>	-	710
Pulau Dua	-	1	x	x	x	x	x	x	x	x	1	2
Salira Beach	x	x	x	x	-	7	-	16	-	<u>57</u>	-	<u>110</u>
Pulorida Beach Motel	x	13	-	17	-	17	-	<u>15</u>	x	x	x	x
Anyer Beach Motel	x	x	5	8	4	7	6	10	6	<u>11</u>	9	15
Batukuwung	-	18	-	8	-	10	-	25	-	<u>34</u>	-	22
Karang Bolong	-	22	-	24	-	54	-	67	-	<u>99</u>	1	82
Carita Beach	x	x	x	x	x	x	8	17	<u>8</u>	<u>19</u>	10	23
Carita Krakatau Beach Hotel	x	x	x	x	6	7	6	8	6	<u>8</u>	7	9
Ujung Kulon	x	x	-	1	-	1	-	1	1	3	1	1
Others	7	37	3	23	6	25	5	44	5	<u>58</u>	5	82
Total	8	<u>1,787</u>	10	1,219	16	1,668	x	x	26	977	34	1,066

Remarks: - F: Foreign Visitors D: Domestic Visitors

- The number of visitor arrivals in holy places other than Old Banten is not included in the above Table.

- Figures underlined are adopted for reviewing the number of visitor arrivals in 1984 in order to arrange yearly fluctuation (see Table 3-32).

Sources: Kantor Diparda Kab. Pandeglang, Kepala Dinas Pariwisata Daerah Kab. Serang, Survey by JICA Study Team.

Table 3-32 MODIFIED NUMBER OF VISITOR ARRIVALS
IN THE STUDY REGION (1984)

(1,000 Person-visits)

		Beach	Marine	Nature	Pilgrimage	Culture	Outdoor Rec.	Others	Total
S e r a n g	Old Banten			2	1,121	72			1,195
	Existing Beaches in Kab. Serang	180	3				68		251
	Other Exist. Destination			1			17	34	52
	Sub Total	180	3	3	1,121	72	85	34	1,498
P a n d e g l a n g	Ujung Kulon & Krakatau			4					4
	Existing Beaches in Pandeglang	33	1				13		47
	Existing Holly Places in Pandeglang				238				238
	Other Exist. Destination						3		3
	Sub Total	33	1	4	238		16		292
Grand Total		213	4	7	1,359	72	101	34	1,790

Source: JICA Study Team estimation

Refer to Table I(E)-2 for further detail.

Table 3-33 PROPORTION OF VISITORS BY ACTIVITY
IN THE STUDY REGION IN 1984 /*

				(%)
Beach recreation	11.9	Pilgrimage	75.9	
Marine holiday	0.2	Culture	4.1	
Outdoor recreation	5.6	Others	1.9	
Nature observation	0.4	Total	100.0	

Remark: /* Detail to be referred to Table I(E)-2, Chapter 2.

According to the figures in Table 3-34, the rate of overnight use is fairly small. On the other hand, most foreign visitors are of overnight users in spite of their few visits.

The occupancy rate of hotels, in general, is small, but comparatively high in businessman oriented hotels such as Merak Hotel as shown in Table 3-34.

Table 3-34 SITUATION OF ACCOMMODATIONS
IN THE STUDY REGION IN 1984

(No. of guests: 1,000)

	No. of rooms	No. of beds	Number of guests			/2 Occup. rate (%)
			D	F	/1 T	
Classified hotels						
Anyer beach motel	62	132	18.6	9.9	28.5	59.1
Carita beach hotel	150	320			13.8	11.8
Merak beach hotel	40	104			25.5	67.2
Pulorida beach hotel	31	62			10.6	29.0
Others	49	100	7.9	-	7.9	21.6
Total		718			86.3	32.9
Other accommodations	605	991				

Remarks: /1 T = Total, D = Domestic, F = Foreign

/2 Occup. rate = Bed occupancy rate

Source: DGT & DIPARDA Kab. Serang

3.3.2 Tourist resources

Based on the results of field surveys and available data and information, existing tourist resources in the study region can be assessed as follows (see Fig. 3-5).

1) Tourist resources in the study region

(1) Natural assets

a. The Krakatau Islands

The Krakatau Islands are a group of four islands lying between Java and Sumatra in the Sunda Straits and are part of Kab. Lampung Selatan of Sumatra. Krakatau became world famous after the disappearance of the island of that name in the aftermath of the catastrophic eruption in 1883 and its rebirth in 1927. The new volcano was named Anak Krakatau or Child of Krakatau. It rises to a height of 150 m and is still rising. Subsequent significant eruptions occurred in 1952 and 1981.

The phenomenon of the Krakatau Islands has attracted the interest of scientists as well as the attention of tourists. They are preserved as a part of the Ujung Kulon National Park. Access to the Islands can be made from the port of Labuan by motorized boats. Because of the scarcity of boat facilities, only a limited number of day trippers can visit the Islands at present.

b. Ujung Kulon National Park and neighbouring islands

The Ujung Kulon peninsula is located at the southwestern tip of the western part of West Java. It is covered with dense forests and is administered as a national park along with Panaitan Island and Peucang Island and is both a UNESCO Biosphere Reserve and a World Heritage Site. The national park is the habitat of many rare and interesting species of wildlife such as the one-horned rhinoceros, wild oxen, Javan green peafowl, green junglefowl, white-winged wood-duck, leaf monkeys, flying foxes, crocodiles, giant lizards, green turtles, and many rare and interesting trees and plants. The Javan tiger however is unfortunately now extinct.

The two islands of Panaitan and Peucang are partly surrounded by some exceptionally fine coral reefs and have some palm-fringed white sand beaches. They offer suitable spots for undersea recreation such as snorkeling and scuba diving. Panaitan has possibly the oldest Hindu relic in Indonesia.

They are only accessible by boats from Labuan or Tamanjaya. Visit permits from the Forestry Service are required for entry to the area. Existing overnight accommodations which are administered by the Forestry Service consist of guest houses in Peucang and Handeuleum islands. A special programme for a 5-day package tour for visitors desiring to visit the Ujung Kulon National Park is available from Jakarta.

Although the Ujung Kulon Peninsular inclusive of its neighbouring islands possess to some potential for tourism, it is thought that in order to preserve the natural environment and existing

wildlife, no major development for mass tourism should be made in the area. Moreover, the remoteness of the sites and difficulty of access will render any major investment unfeasible. It is recommended, however, that improvement should be made to existing facilities, and that the area should be reserved mainly for naturalists and nature loving visitors.

c. Pulau Dua

This island is located in the Bay of Banten in the northern part of the study region. It is known as a bird sanctuary. It is accessible by boat from nearby Kaibon Palace. Entry permits are needed to visit the island.

Pulau Dua is administered as a natural reserve and is of interest to naturalists and scientists because of the varieties of birds found there.

d. Rawa Danau

Rawa Danau is situated on a plateau lying between Mt. Gede and Mt. Karang. With its lake and the surrounding freshwater swamps, it is administered as the Rawa Danau Reserve.

Rawa Danau originated as a part of a caldera or collapsed volcano and abounds in swamp vegetation. It is inhabited by leaf monkeys, leopards, porcupines, wild pigs, crocodiles and a wide variety of birds.

The lake has been invaded by swamp vegetation and at present nearly half of the reserve area is being farmed by local inhabitants. For vacationers, boats are available on the lake and

walking can be enjoyed around the area. Entry permits are required to visit the reserve.

The area would attract naturalists with specific purposes. Scenic spots can be viewed from the upper road along the northern boundary and can be of interest to tourists travelling along this road.

e. Beaches

Sandy beaches stretching along the coasts of the study region are generally narrow and partly rocky. Water is slightly turbid due to release from coral reefs.

Some beaches in the northern part of the region facing the Java Sea are lacking in natural beauty and most of them have been developed for industrial purposes. The surrounding landscape is not very attractive. Despite such environment, the Pulorida and Salira beaches are popular among domestic vacationers.

The beaches on the west coast, however, and along the Sunda Straits have fine white sand although some of them are interrupted by rocks.

Among the locations investigated, Carita beach is agreeable in beauty, but most of the land has already acquired by city people and partly occupied by local inhabitants.

Other beaches have fewer constraints to development in spite of their less attractiveness.

Although tourist facilities have been developed to some extent at various locations, many of them are

sub-standard. A general assessment of existing conditions is shown in Fig. 3-7.

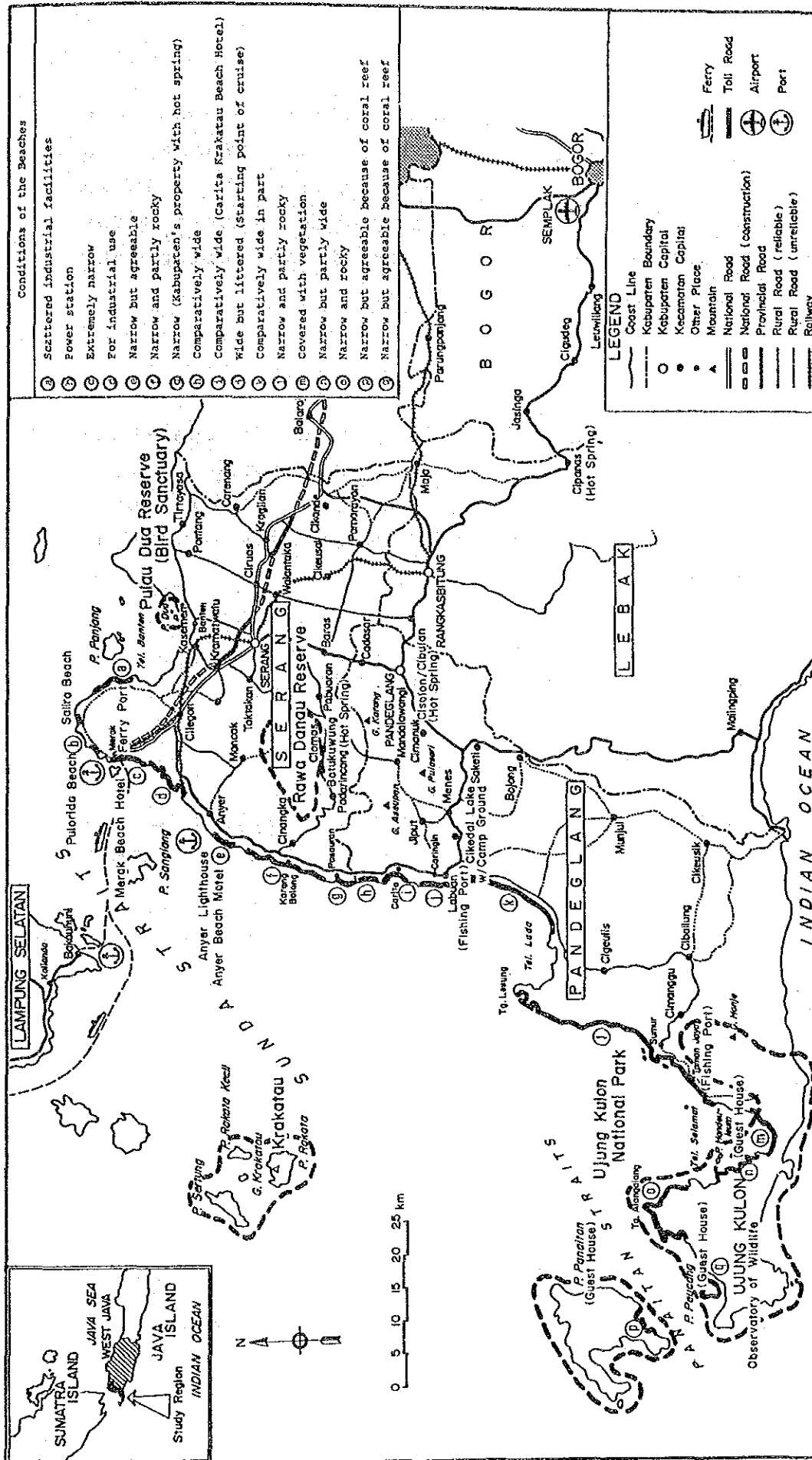


Fig. 3-7

TOURISM CONDITIONS IN THE STUDY REGION

DEPARTMENT OF TOURISM, POST AND TELECOMMUNICATION
 DIRECTORATE GENERAL OF TOURISM
 JAPAN INTERNATIONAL COOPERATION AGENCY
 THE STUDY ON THE REGIONAL DEVELOPMENT PROJECT
 IN THE WESTERN PART OF JAVA

f. Danau Cikedal

Danau Cikedal is a small lake surrounded by forests lying 8 km east of Labuan. There is a camping ground on the shore of the lake. It is suggested that the area should be converted for educational purposes by providing appropriate facilities.

g. Hot springs

A number of hot springs are found in the study region. Except for the one at Butukuwung, most of the existing hot springs are mainly used by local inhabitants. The known hot springs are located at the following sites:

- Batukuwung (now under repair)
- Sukanegara (8 km north of Carita)
- Cisolong
- Cibulan

Hot springs can become a valuable asset in tourism if they are properly developed in prominent surrounding and well managed.

(2) Human assets

a. Historic relics

Many historic relics are found in the area. They consists mostly of remains of the Sultanate of Banten from the 15th Century and are concentrated mainly in the Old Banten area. They consist of:

- Ruins of former palaces;
- an Islamic Mosque (Mesjid Agung);
- Graves of the Sultans; and
- an old water reservoir.

Furthermore, the ruins of the old Fort Speelwijk built by the Dutch in 1684 ~ 5 and the renovated Buddhist Wan De Yuan Temple, one of the oldest in Java are located nearby. There is also a small historic museum located next to Surosoan Palace.

The Department of Culture and Education have been surveying the ruins of the Istana Kaibon and Surosoan Palaces and have undertaken some restoration work for historical and educational purposes. There are also many pilgrims visiting the Grand Mosque at Old Banten. However, despite the existence of these historic relics, their superstructure and appearance are less impressive than those found in other parts of the country, and in particular those in Central Java.

Consequently, the historic relics and existing Mosques will be used primarily for educational and religious uses, while tourism will be secondary.

However, the area could attract more tourists if appropriate development is realized by planning better restoration of the ruins and by improving

tourist facilities and approach roads. When these are realized, the area could be connected with other tourist attractions and included in tourist tours of the study region.

In addition to the above, there is Karanghantu which used to be the prosperous port of Old Banten in the 15th and 16th Centuries. It has no historic relics left and is presently used as a fishing port.

b. Cultural assets

a) General background

Most people living in the Banten region, which consists of the Kabupaten Serang, Pandeglang and Lebak, are Moslem Sundanese.

Among the three Kabupatens, Serang has been subject to influence from the outside throughout its history. In the period of the Sultanate this was due to the existence of the port of Banten. Today it is due to the existence of the Jakarta-Merak Highway and large scale industries such as the Krakatau Steel factory at Cilegon.

b) Social characteristics

Lead by Serang, the community of the 3 Kabupatens is known as Islamic fanatic community, rough and hard. This community has the reputation of not knowing the word of "surrender". But they are open and straightforward, and don't bear grudges. There is a spirit and tradition of mutual aid.

It was in this Islamic spirit that the leaders of those times including Sultan Ageng Tirtayasa in the 16th century for long resisted the colonial Dutch.

The present community still respects and obeys its Islamic leaders and their nearby followers who provide strong informal leadership and have great influence, especially in rural areas, in all socio-cultural matters.

In the situation as described above, tourism could be developed side-by-side with the orthodox religion.

c) Socio-cultural tourist resources

Viewing from the standpoint of tourism, the study region is abundant in socio-cultural resources for tourism such as arts, ceremonies, handicrafts, cuisine and religious places, most of which date back to many years ago.

Arts

The arts in the study region comprise 3 categories: music, dance and stage.

In music, such a variety of instruments as mentioned below are played.

- Rattling bamboo instrument (Angklung Banten)
- Bamboo pipe instrument (Calung)
- Metal gong (Degung)
- Drum (Gendang, Genjring)

The above instruments are often performed together with songs (Orkes, Mawalan, Kawih) and/or dances (Ubrug, Rudat, Kuda Lumping).

Besides these arts, there is a kind of self-defence magic such as Debus and Patingtung, which will be of interest for tourists, if moderately performed.

Ceremonies

There are various types of ceremonies as follows:

- Personal ceremonies,
- Islamic ceremonies,
- Agricultural ceremonies,
- Ceremonies concerning the construction of houses,
- Sea ceremonies, and
- Annual ceremonies of the Old Banten Chinese temple.

Although some ceremonies are closed and cannot be attended by tourists, others are open.

Some of the agricultural ceremonies and sea ceremonies could be important tourist attractions in the study region, if well organized.

Handicrafts

The handicrafts in the study region are based on small home industry, commodity oriented and producing handmade souvenirs such as the following:

- Settings of semi-precious stones
- Embroidery work,
- Iron goods,
- Handicrafts made from bamboo, screw-pine, coconut leaves, etc., and
- Shell works.

However, these are not yet refined as souvenirs for tourists and do not yet have a study market.

Cuisine

The study region is supposed to be the source of Sundanese food, but as yet there are few good restaurants serving such ethnic cuisine of interest to tourists.

Besides the above dishes, there are special ethnic cakes mostly made of rice powder. They are served only on special occasions, like weddings and annual festivals.

Religious places

In the study region, there are the following religious places:

- Sultanate Palace (Old Banten),
- Grave of Sultan Hasanuddin (Old Banten),
- Chinese Temple (Old Banten),

- Cibulakan Batu Qurai of Syah Mansur (Cibulakan),
- Grave of Syah Mansur (Cikaduweun), and
- Grave of Syah Asnawi (Caringin).

The above religions places attract more than one million pilgrims every year from Sumatra, Jakarta and the whole West Java.

2) Tourist resources in related area (Kab. Lebak and Lampung Selatan)

Lebak

The Gunung Halimun Reserve is located in the Halimun Massif in the southeastern part of Lebak. It covers an area of 36,000 hectares and constitute the main watershed of western Java.

Its forests abound in flora and fauna. The characteristics of the flora are the presence of many varieties of plants and trees ranging from temperate species to tropical ones such as laurels, oaks, moss and orchids. There is also a rich fauna, including leopards, several kinds of monkeys, and wild pigs.

The Halimun mountains are the traditional hunting grounds of the Badui people. This minority ethnic group lives in small isolated communities. There is also a small Hindu community located near Cibeo some 30 km south of Rangkasbitung. Though their life style may be attractive and exotic they have no wish to open their society to the outer world due to their strong faith. This area should not therefore be opened to tourists.

On the western lower slopes of Halimun, one can find old gold and silver mines.

From information gathered so far, it would seem that there is no plan to construct new access roads into the area, and in particular no tourist access roads are presently envisaged by the authorities.

Other natural assets can be found. The hot spring at Cipanas is one of them but its use will be limited to local inhabitants.

The beaches along the Indian Ocean on the southern coast could not at present be considered for development as a tourist destination because of remoteness and lack of access.

Lampung Selatan

The scarcity of attractive resources in Kabupaten Lampung Selatan is one of the reasons for tourist under development in this part of Lampung Province in Sumatra.

However, some beaches such as Merak Belantung Beach Resort would be suitable for marine sports.

There is also the Way Kambas Reserve in the Kabupaten Lampung Tengah, north of Lampung Selatan which is reputed to be the best place to observe the famous wild Sumatran elephants and its elephant training school. Besides elephants, there are other large animals such as Sumatran tigers and wild pigs which thrive in the reserve. There are also a wide variety of bird species.

The Reserve, and Lampung Selatan generally, is isolated from the major tourist route, and is mainly accessible by motorized boats from Merak or Jakarta. It offers much interest to naturalists however.

3.3.3 Tourist facilities

1) Accommodation

In the study region, there are a variety of accommodations such as hotels, cottages, home stays, guest houses, etc., however the number of classified hotels is only 6, comprising 2 of two stars and 4 of one star [see Table 3-35).

The above two star hotels are of the cottage type and are less attractive than those in the same charge group in Bali.

Therefore, it can be said that although accommodation for domestic tourists is quite well developed, there is as yet no international class hotel in the study region. Such a situation is clearly disadvantageous to attracting not only foreign tourists, but also foreign residents to the study region.

Table 3-35 ACCOMMODATIONS IN THE STUDY REGION IN 1984

Kabupaten	Category	No. of facilities	No. of rooms	No. of beds	
Pandeglang	Hotel	Classified	1	150	300
		Non-Classified	1	13	15
	Others	4	56	80	
	Total	6	219	395	
Serang	Hotel	Classified	5	182	398
		Non-Classified	4	79	140
	Others	28	457	756	
	Total	37	718	1,294	
Total in the study region	Hotel	Classified	6	332	698
		Non-Classified	5	92	155
	Others	32	513	836	
	Total	43	937	1,689	

Source: BAPPEDA TKI

2) Restaurants and catering

The restaurants and catering situation in the study region is similar to that of accommodation.

Although there are plenty of restaurants and food stands, restaurants for foreigners are limited to those in classified hotels and some in populated cities such as Serang, Cilegon, etc. and they are also substandard. This

situation has to be improved to promote tourism in the study region.

3) Recreation and amusement centers

As for recreation facilities, the following toll beaches are listed:

a. Salira beach

This private beach was opened in 1980 and has inns, cottages, a restaurant, food stalls, etc. It is fairly spacious and its entry fee is cheap, so it is suitable for domestic group use.

b. Pulorida beach

Pulorida beach is located 5 km north of Merak Harbour with cottages, a restaurant, swimming pool, etc., but the environment is poor because of urbanization of Merak.

c. Anyer beach

This beach belongs to the Anyer Beach Motel with well maintained agreeable facilities such as restaurants, bowling-alleys, a garden and marine sports equipment.

d. Karang Bolong beach

Karang Bolong is named after a hollow reef stone along the sea caused by the eruption of Krakatau in 1883. This beach has a pool, cottages, and an observation place on the above mentioned stone. It is also suitable for domestic group use.

e. Carita beach

Carita beach, about 10 m wide and 2.5 km long, is the best beach in the study region. The Carita Krakatau Hotel is situated on the shore at the middle of the beach.

The public beach of Kabupaten is 2 km north of the Hotel. No specific recreational facilities have been developed on this beach, but the Carita Resort Hill behind the beach has a tennis court.

Besides the recreational facilities mentioned above, there is the Krakatau Country Club with restaurants and guest houses located in Cilegon and managed by the Krakatau Steel Industry.

4) Tourist transportation

Vehicles can be hired at most of the cities and towns neighbouring tourist destinations, while motor-cruisers are available at a few ports such as Labuan, Merak, etc.

A public bus service is available from Jakarta to Merak and Labuan, and daily a transport service operates from Jakarta to Krakatau Beach Hotel.

There is no marina for public use or airstrip for flights in the study region.

5) Other facilities and services

Although tour guides can be hired at certain tourist destinations such as at Carita, the base for excursions to the Krakatau Islands and Ujung Kulon, the tour support system, in general, is poor.

3.4 Institutions and Organizations for Tourism Development

3.4.1 Legislations and institutions

The regulations (legislation and institutional) related to tourism in Indonesia are generally promulgated in the form of decrees or instructions of the President of the Republic of Indonesia and the Ministers concerned.

Government policy on the tourism development and general stipulations are enacted as instructions or decrees of the President of the Republic of Indonesia.

Regulations concerning the implementation of tourism development, however, such as organization, operations, working procedures, etc. are issued in the form of decrees of the Minister of Tourism, Post and Telecommunication.

Recently, in order to promote tourism, the Government of Indonesia has been improving the legislation and regulations concerned, among which the followings are noteworthy:

- Permitting a two-months stay without visa for foreign tourists from approximately 40 countries,
- Relaxation of foreign investment in Indonesia,
- Opening international airports in other parts of the country, such as Manado, Ambon, Padang and Biak, and
- Increasing the fiscal fee for domestic tourists travelling abroad.

3.4.2 Organization for tourism development

In Indonesia, regional development is promoted on the initiative of the Government (consisting of several Departments and other national agencies) headed by the President of the Republic.

The organizational structure for tourism development is shown in Fig. 3-8. As shown in this figure, tourism development has various overspill effects, and induces necessarily many intricate involvements of the agencies concerned. The Departments and other national agencies which are deeply engaged in tourism development are the following:

- Department of Tourism, Post and Telecommunication
 - . Directorate General of Tourism
 - . Regional Office of Tourism, Post and Communication (KANWIL)
- Department of Forestry
 - . Directorate General of Forest Protection and Nature Conservation
- Department of Education and Culture
- Department of Home Affairs
 - . Governor of West Java Province
 - . Bupati (Kab. Serang and Pandeglang)
 - . DIPARDA I & II (Kab. Serang and Pandeglang)
 - . BAPPEDA I & II (Kab. Serang and Pandeglang)
- Department of Communications
 - . Directorate General of Land Transportation
 - . Directorate General of Sea Transportation
 - . Directorate General of Air Transportation
- Department of State for Population and Environment
- Department of Justice
 - . Directorate General of Immigration
- Investment Coordinating Board

The Directorate General of Tourism, under supervision of the Department of Tourism, Post and Telecommunication, is primarily responsible for implementation of policy in regard to tourism as stipulated by the Minister.

The Directorate General of Tourism consists of:

- Secretariat of Directorate General;
- Directorate of International Tourism and Institutional Relations;
- Directorate of Accommodation and Multi-Tourism Guidance;
- Directorate of Tourism Marketing;
- Directorate of Travel Agencies.

The Directorate General has the following executive functions:

- Formulation of technical policy, providing guidance and encouragement, and granting permits in the sector of tourism in conformity with the policy as stipulated by the Minister and on the basis of prevailing legal provision;
- Implementation of technical policy in conformity with prevailing legal provisions and policies; and
- Technical observation and reporting on the basis of prevailing legal provisions and policies.

West Java is divided by the Directorate General of Tourism into 6 development regions, namely Tourism Region I - Banten, Region II - Bogor, Region III - Purwakarta, Region IV - Cirebon, Region V - Priangan, and Region VI - East Priangan. The study region is within the Tourism Region I - Banten.

The Directorate General of Forest Protection and Nature Conservation under the supervision of the Department of Forestry administers the Ujung Kulon National Park (PHPA) consisting of G. Payung, G. Honge, Panaitan, Peucang and Krakatau Islands and other natural resources in the study region such as Rawa Danau, Pulau Dua, Pulau Sangiang and G. Tukkung Gede.

The Department of Education and Culture superintends relics, monuments, museums, historic buildings, etc. by constructing, maintaining and/or restoring them.

The Department of Home Affairs is the principal agency responsible for regional development through the administrative structure of the governorship and its regional offices (BAPPEDA I & II and Cabang Dinas).

The Department of State for Population and Environment has been more directly concerned in regional development since enactment of the regulation pertaining to environmental impact analysis (1986). It is expected that tourism development, which has various impacts, will necessarily be much affected by this regulation.

The Directorate General of Immigration under supervision of the Department of Justice is involved in tourism through the issue of entry visas for foreign visitors to Indonesia at its immigration offices (mostly at the international airports).

The Investment Coordinating Board is responsible for the coordination of capital investment in Indonesia and is thus concerned in the tourism development mainly in regard to the joint ventures in business between local and foreign investors.

Under the Secretariat General of the Department of Tourism, Post and Telecommunication, there exist the State-operated enterprises such as Natour, Borobudur, BTDC, PT. HII and two

centers of tourism: one for training and education and another for research and development. In case of implementation of the present Regional Development Project in the western part of West Java (Tourism Development Project), it is probable that this project will be operated by the State under the BUMN.

CHAPTER 4

GUIDELINES FOR REGIONAL DEVELOPMENT

CHAPTER 4 GUIDELINES FOR REGIONAL DEVELOPMENT

4.1 Direction of Regional Development

4.1.1 Development potentials

1) Natural conditions

The study region is included in the Tourism Region I of Banten. It possesses tremendous diversities in natural resources as it has on three sides the Java Sea, the Sunda Straits and the Indian Ocean. Its diversified topographic features are additional to its development potential.

The study region is covered with arable lands, rivers and lakes, mountains and forests. Most of the arable lands are cultivated. Protected forests, national parks, hot springs and lakes as well as sandy beaches have prospective potential for development.

With about 75 km of coastline, many beaches have been established in the northwestern parts of the study region. There are hot springs, in mountainous areas some of which are being used by the local population. The most outstanding tourist assets of the study region are the historical and cultural background of the Banten area, the Ujung Kulon National Park and the Krakatau Islands in the Sunda Straits.

The study region possesses a comparatively good road network which is linked with the capital Jakarta through the Jakarta-Merak Highway and with Bandung, the capital of West Java Province, through Bogor. It is also the gateway to Sumatra Island served by ferry services at Merak.

2) Agriculture

More than 68% of the population in the study region are engaged in agricultural activities. They provided more than 33% of GRDP of the Banten area in 1984. The main products are food crops, vegetables and fruit. Plantation estates produce coffee, rubber, coconut, etc. Animal husbandry is widely practiced but on a small scale involving buffalo, horse, goat, sheep, chicken and duck breeding.

3) Fisheries

Fisheries are important activities not only along the coast but also inland at many fish breeding ponds.

4) Forestry

Out of the area of 4,520 km² in the study region, forests cover about 928 km². Most of the forests belong to the Ujung Kulon National Park and are designated as nature reserve areas. Forest exploitation is regulated and is an important source of raw materials for agro-forestry industries. The forests are also a source of domestic fuel.

5) Manufacturing industries

Except for the northern part of the Banten area around Cilegon where heavy industries are located, the majority of industries in the study region are small enterprises employing 5-19 workers. The total number of small industries in the study region was about 19,400 units employing some 50,000 workers. Their total production was valued at Rp. 44 billion in 1985/86.

6) The constraints

With more than 68% of the population living in rural areas, and with the major part of the food crop production used for self-consumption, it is obvious that increase in agricultural productivity should be emphasized in the context of regional development.

Many obstacles will have to be overcome to solve existing problems. In the agricultural sector, land holding averages less than 0.7 ha per farm household. Although any surplus of the production can be sold for cash, commercialization of production is made difficult by the inadequacy of inter-regional communication with insufficient rural roads.

In the fisheries sector, poor facilities for cold storage is seen as a major obstacle to greater catch of both marine and inland fish.

The sales of manufacturing products are constrained by the limited purchasing power of the majority of the region's population. The low income of the people has an impact on their living standards as well as on their health and education as a whole.

7) The prospects

With its geo-economic importance, the northern parts will continue to play a leading role in regional development. As it develops further, it will generate more productive and service activities. These will include not only commerce and trade but also public service functions. There is already a significant trend in the migration from rural areas to the cities in the study region.

If such trend continues, the ratio of rural to urban population will decrease in the future. The lower

population in rural areas will provide more land for the remaining farmers and result in bigger production per farm household. This will lead to more income from sales of farm products. With higher purchasing power from farmers, demands for consumer goods will become higher and will have a beneficial impact on the manufacturing and service industries.

The regional economy will have a further boost if tourism, as is being planned, is being developed in the study region. The prospect of tourism development is particularly bright as the region possesses intrinsic natural potential as well as historical assets.

4.1.2 Development strategies

1) Objectives

The Government of West Java Province has set out long term objectives for social, economic and cultural development of the province. Along with the national development policy, the development objectives for the West Java Province were set in the Regional Repelita IV (the 4th Five Year Development Plan). They are (1) to level up living standards, education and social welfare of the people and, (2) to establish solid foundations for the next development stage.

2) Conceptual spatial framework

Many projects have been studied at the national as well as at the regional level as far as the study region is concerned. The full list of projects is mentioned in Annex I(C), Section 2.2.1.

The concept of the development strategy in the study region is based on the development of three main development corridors [see Fig. 4-1]. It involves (1) the

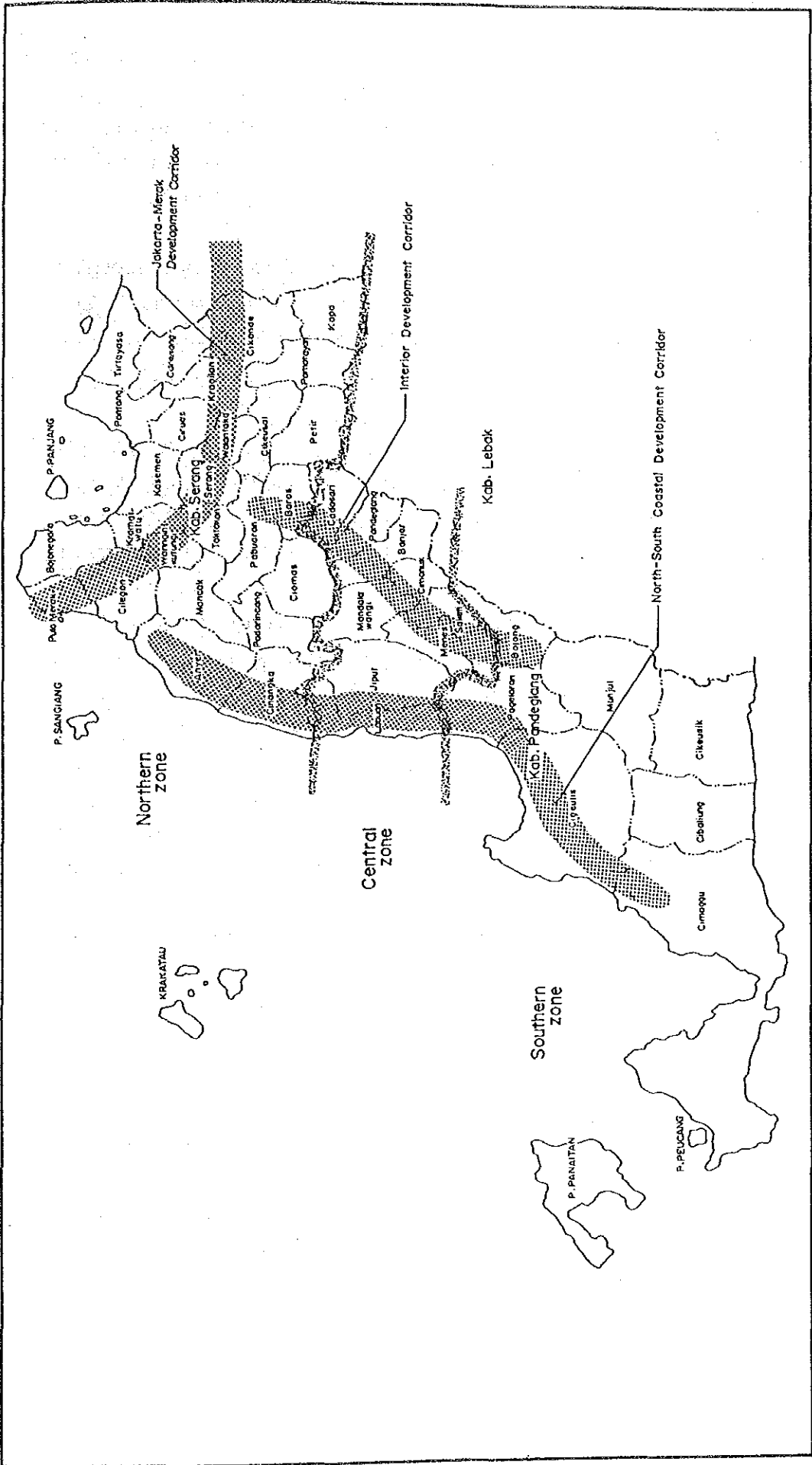


Fig. 4-1
DEVELOPMENT CORRIDORS AND DIVISION
BY ZONE OF THE STUDY REGION

DEPARTMENT OF TOURISM, POST AND TELECOMMUNICATION
DIRECTORATE GENERAL OF TOURISM
JAPAN INTERNATIONAL COOPERATION AGENCY
THE STUDY ON THE REGIONAL DEVELOPMENT PROJECT
IN THE WESTERN PART OF JAVA

0 5 10 20 30 Km

consolidation of the Jakarta-Merak development corridor (through Serang and Cilegon), (2) the enhancement of the north-south coastal development corridor (from Anyer to Cigenlis) and, (3) the establishment of the interior corridor (Baros-Pandeglang-Menes and Saketi-Bojong).

The Jakarta-Merak development corridor is rapidly becoming an industrial zone with Cilegon as its nucleus. The completion of the Jakarta-Merak Highway will quicken the pace of industrialization in this corridor.

As compared with the Jakarta-Merak development corridor, the north-south coastal development corridor has not yet been well established in the region due to poor infrastructures and under-development of remote areas in the south. The enhancement of the north-south coastal development corridor is meant to remedy to such a situation. For that, growth centers need to be created in the northern and southern areas of the region where Anyer, Panimbang and Cigeulis can be the respective growth points.

The interior development corridor along the provincial roads from Serang to Labuan and Malingping through Pandeglang may be regarded as a secondary development corridor in the study region. To undertake regional development in the more peripheral areas, it is necessary to promote the development of surrounding corridors.

It should be noted that these strategies are not meant simply to promote urban development of the study region. More importantly, they are aimed at inducing the development of rural hinterlands which are the base of the regional economy. Thus complementary measures would be required to incorporate rural areas into the spatial framework envisaged.

4.1.3 Direction of development

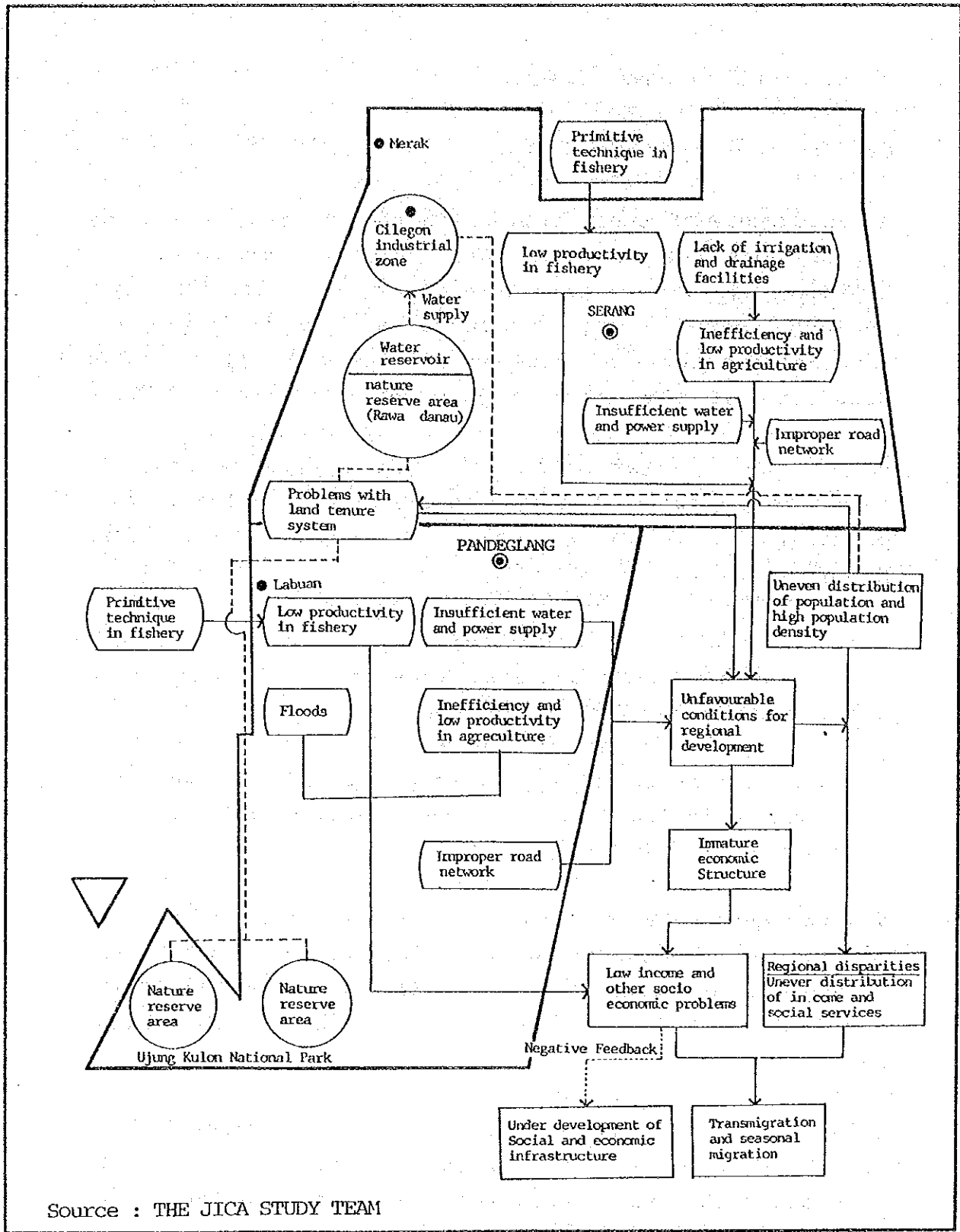
1) Overall direction

As compared with other regions in the country, the study region does not seem to have critical problems for regional development other than common obstacles that most regions share. Major factors and more important interactions between problems are shown by the problem structure of the study region in Fig. 4-2. Future prospects of the region seem fairly bright, given its various kinds of resources. To exploit these potentials, development efforts should be concentrated on several most promising areas rather than spread out thinly over different areas.

The study region consisting primarily of the two Kabupatens of Serang and Pandeglang can be divided into three main zones, namely the northern zone covering the whole Kabupaten of Serang, the central zone comprising the northern Kecamatans of Kab. Pandeglang and, the southern zone which includes the southern Kecamatans of Kab. Pandeglang [see Fig. 4-1].

The northern zone is the most developed with the highest population concentration of 1,150 persons/km² in the Serang-Cilegon-Merak area. It contains many industries and includes the old city of Banten with its historical background.

Other activities revolve around agriculture, fisheries and livestock breeding. Most of the forests in the northern zone are protected forests for soil protection and water conservation. Some 70% of farm households own less than 0.5 ha of land. The northern zone has a direct link with the capital Jakarta through the Jakarta-Merak Highway.



Legend :

- Direct flow
- Indirect relation
- Close connection flow
- Boundary of Kabupaten



DEPARTMENT OF TOURISM, POST AND TELECOMMUNICATION
DIRECTORATE GENERAL OF TOURISM

JAPAN INTERNATIONAL COOPERATION AGENCY

THE STUDY ON THE REGIONAL DEVELOPMENT PROJECT
IN THE WESTERN PART OF JAVA

Fig. 4-2
PROBLEM STRUCTURE OF THE STUDY REGION

The central zone has a relatively high population density. Its economic activities are mainly agriculture and fisheries. Land holding is less than 0.5 ha per family for about 69% of the farming households. The annual per capita income amounted to Rp. 81,100 in 1980. The zone is a big producer of fruits. Other important cash crops are coconuts, rubber, cloves, coffee, melinjo, etc. Pandeglang and Labuan cities support the zone's activities with their commercial and service functions.

There is an arterial road connecting east-west through Pandeglang, Saketi and Labuan and from Labuan it continues north along the west coast toward Anyer. From Saketi it branches off toward the south. A small mooring exists at Labuan for fishery but no other significant activity can be observed along the coast. An old railway runs alongside of the east-west arterial road although the service on this line has been terminated some years ago.

The southern zone is the least developed among the three zones in the study region, with an estimated annual per capita income of only Rp. 63,270 (1980). The number of farm households with the land holding of less than 0.5 ha amounts to 36,295, accounting for about 56% of the total.

The majority of farmers are engaged in subsistence agriculture, cultivating mostly paddy, maize, soybeans, cassava, sweet potatoes, groundnuts, etc.

Main cash crops are coconuts, rubber and coffee. Oil palm, cloves, kapok and sugar-palm are also grown in areas suitable for those respective crops.

Other production activities have generally high potential, but have not been sufficiently utilized. Fisheries (both sea and inland) have been developed but only on a small scale, especially in Kec. Pagelaran, Cigeulis and

Cibaliung. Yields are naturally low, despite their favorable location, because of the small scale.

The zone is considered to be comparatively suitable for livestock production. Stock raising is, practiced generally on hill slopes, fairly active in Kec. Cigeulis, Cimanggu and Cibaliung.

The Ujung Kulon National Park (56,000 ha) located in the southwestern part of the zone (Kec. Cimanggu), is a nature conservation area.

The manufacturing sector is minor. The small industries of the zone are mainly concerned with the processing or manufacturing of sugar palm (Kec. Cigeulis), salted fish (Kec. Cimanggu and Cigeulis), and tiles/brick (Kec. Cigeulis, Bojong, Cikeusik and Cibaliung).

Road links are the only reliable means of transportation in the region. However, their maintenance and improvement is lagging far behind demand and are not sufficient to support any development activities.

Tourism would be a potentially important sector with the Ujung Kulon National Park, viz. G. Payung and Honje, Panaitan, Peucang, Handeuleum and Krakatau Island, Carita beach, etc.

2) Basic direction by zone

(1) Northern zone

Themes for development of the northern zone revolve around the problems of excessive population concentration and shortage of arable land, poor accessibility to the interior areas, economic dependency on heavy industries around Cilegon and, lack of social infrastructures in rural areas.

To solve the above problems, main directions of the northern zone development would be the following:

- To introduce new types of sub-sector industries to further process primary products manufactured in the Cilegon Industrial Estate and to develop the agro-based and aqua-based industries; and
- To increase production of paddy and horticultural crops by intensification and expansion and to diversify crops (food and cash crops) in combination with the rehabilitation or construction of dams for irrigation (ex. Karian dam) with a view to inducing processing industries in the backward areas of the northern zone.

As for increasing crop production, the zone's preference order for different crops is as follows:

a. Paddy

- Irrigation Paddy: to be developed especially in Pontang, Tirtayasa and Kasemen areas,
- Rain-fed paddy: to be promoted in Carenang, Cicande, Pamarayan and Kopo areas.

b. Horticultural Crops (to supply the development centers and Jakarta)

c. Coconuts

d. Coffee (Robusta)

e. Cloves

f. Vanilla

g. Rubber

h. Melinjo

It is doubtful if a significant increase in coconut and rubber production would be justifiable under present world markets conditions, but production of cloves and vanilla should be encouraged to meet international and domestic demands.

Other possibilities include the following:

- To increase fisheries activities and production of marine products (e.g. sea weeds) by organizing, and possibly by capitalizing on, fishermen's cooperative societies, together with the construction of ice plants and cold storage in each fishery base (e.g. in Kec. Anyer, Cinangka and Kasemen);
- To promote livestock production, especially stall-fed cattle and milk production with zero grazing, in order to improve the diet of people and meet increasing demand in the development centers;
- To intensify afforestation so as to protect against soil erosion, to protect the catchments of rivers and underground water resources, and to promote sustained production of timber and wood products;
- To strengthen the economic structure through securing marketing channels by improving access roads and other facilities and institutions;
- To develop tourism on the west coast and in old Banten in order to meet the needs of international and domestic tourists.

(2) Central zone

The central zone is facing problems similar to most rural areas in Indonesia pertaining to poor rural infrastructures and amenities, low levels of technology in production sectors and the like.

The basic direction for development of the central zone will lie in the following:

- To improve access from the main provincial road in order to induce agricultural development in the interior and the establishment of agro-processing industries along the corridor;
- To organize existing fisheries and stockbreeding activities which are mostly at subsistence level, possibly by capitalizing on existing cooperative societies so as to provide another driving force for the zone;
- To make Labuan to continue to lead the zone's development by removing the existing bottlenecks of storage and marketing facilities, and other infrastructure;
- To enhance people's standards of living by meeting more immediate requirements such as by increasing in food and cash crop production and creation of job opportunities by promoting manufacturing industries (including agro- and aqua-industries);
- To improve the provision of infrastructure and utilities, especially rural access roads and electricity in order to promote the rural economy;
- To exploit the potential tourism resources (especially west coastal beaches) for the regional development of the zone.

(3) Southern zone

The southern zone is handicapped by its peripheral location. Due to its remote location, it has similar problems to those of the other zones but to a more serious degree.

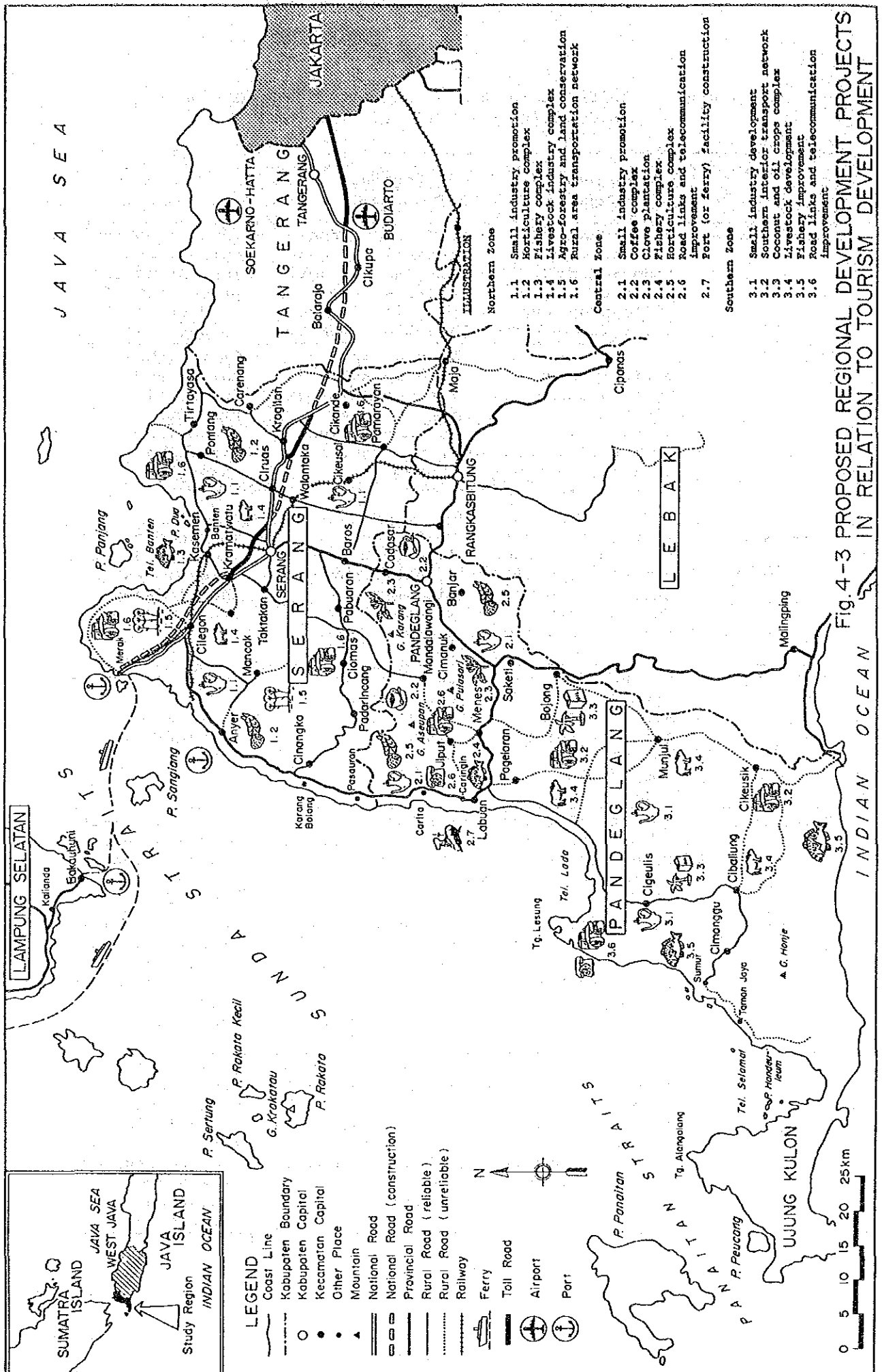
The basic direction for development will lie in the following:

- To improve the road network and storage facilities with the view to expanding and intensifying agricultural (food and cash crops), livestock and fisheries production in backward areas;
- To establish marketing channels to and from Labuan and Pandeglang by establishing cooperatives in each production activity and providing better-storage and marketing facilities;
- To improve the provision of social and economic infrastructure such as water, power, health and education facilities in order to promote the existing economic activities of the zone;
- To strengthen the economic structure by increasing the production of food and cash crops such as paddy, cloves, coffee, pepper, etc. and promoting agro-and aqua-processing industries;
- To tap tourism potentials (e.g. Ujung Kulon National Park) while paying due attention to the needs of nature conservation.

The outline of guidelines for regional development by sector and zone is summarized in Table 4-1 and Fig. 4-3.

Table 4-1 OUTLINE OF THE GUIDELINES FOR REGIONAL DEVELOPMENT BY SECTOR AND ZONE

Zone	Northern Zone	Central Zone	Southern Zone
Agriculture	- To increase the productivity of food and cash crops by intensification and diversification.	- To promote the intensified and diversified agriculture, especially in the interior areas.	- To develop agriculture by increasing the production of food and cash crops.
Fisheries	- To increase marine products by organizing fisherman cooperatives, together with the establishment of the cold storage system.	- To organize fishery activities and improve the storage, transportation and marketing system.	- To increase marine and inland fishery production and establish marketing channels.
Livestock	- To promote livestock production, especially cattle and milk production with zero-grazing.	- To increase livestock production, especially small stocks such as goats, sheep, poultry, etc.	- To promote livestock production (big stocks) in the backward area.
Manufacturing	- To introduce new type of sub-sector industries and develop the agro- and aqua-based industries.	- To establish agro-processing industries along the corridor.	- To promote agro- and aqua-processing industries.
Forestry	- To intensify the afforestation so as to prevent soil erosion, to conserve water resources and to promote the sustained wood production.		- To put emphasis on the nature conservation as well as timber production.
Tourism	- To develop the west coast, Old Banten and Serang as the gateway of the study region.	- To exploit the potential tourism resources (especially west coastal beaches) for the regional development.	- To make the most of wild nature in paying due attention to its natural conservation.
Others	- To strengthen the economic structure through securing marketing channels by improving access roads and other facilities.	- To improve the infrastructure especially rural access roads and electricity in order to promote the rural economy.	- To improve the provision of social and economic infrastructure such as water, power, health and education facilities



4.2 Regional Development and Tourism

Tourism has become one of the biggest sources of foreign exchange earnings in many countries. This tendency has become more important for exporting countries since the decline in world prices of primary products. Indonesia is not an exception to this trend although the country is the biggest producer and exporter of crude oil and mineral fuel related products in Asia.

Indonesia is well known as a tourist destination and it has witnessed a spectacular increase in the number of incoming tourists in recent years. It is blessed with diversities of tourism assets spread over the multitude of islands of this vast country. The diversities lie not only in the country different topographic features, but also in the different ethnics and local traditions and arts. Indonesia already possesses many well-known tourist destinations and has the knowledge and experience in the management of tourism.

In the context of regional development, tourism plays an ever important part as an engine of economic growth for localities where tourism facilities are created. The most obvious and immediate benefit of tourism to regional development is the creation of jobs and opportunities for local people to increase their income and standard of living.

Through increased for food products, souvenirs and other goods, it generates employment in agriculture, food processing, handicrafts, and light manufacturing tourism might contribute to the preservation and revival of local arts and crafts. Among them pottery, weaving, embroidery, jewelry and leather works. There are also knitwear, textile, and glasswares among them. The influx of tourists will encourage the upsurge of performing arts and folklore as well as stimulate local ceremonies and festivals, local music and traditional dance.

There will be also opportunities for the production of crafts for use, both by local population and in hotels, restaurants, and recreation facilities.

Along with the development of tourism facilities, attention should be given to the basic needs of the local population for housing, water, sewage disposal, schools, medical and health services, improvement of infrastructures, and other services.

The impact of tourism on people, particularly on those who work in tourism facilities can be beneficial through the general improvement in living standard derived from employment opportunities.

Employment generated by tourism falls into three categories such as:

- 1) Employment directly related to tourism industries such as hotels, restaurants, transport and commerce,
- 2) Employment indirectly generated in manufacturing and distribution of goods and services to tourism related business, and
- 3) Employment related to investments in construction and other capital goods industries.

In addition to the creation of direct and indirect employment opportunities, the development of tourism in an area can be a motivating factor in promoting and diversifying local production, particularly in agricultural production. Apart from the fact that the tourist industry will attract domestic and foreign visitors, a large number of people will be employed to provide necessary services.

Even though some of the foods will have to be brought from outside of the area, the demand for locally available

fresh foods will stimulate local production to meet such demands. The number of employed people will increase as they settle in the area with their families. In addition to souvenir and handicraft items sold to visitors, the large community employed in tourism industries will become steady customers for daily commodities which will boost local and regional commerce.

Tourism development, without exception, is linked with the construction or improvement of infrastructures and public utilities. The improvement of access will facilitate communication to and from the tourist area. Electricity and water will be supplied to the local population as well. Sewage water treatment plant and other facilities will provide a more hygienic environment for the whole locality, and with the increase in people, schools, hospitals and other public services might improve substantially to serve the needs of the whole local population.

4.3 Direction of Tourism Development

4.3.1 Effects of tourism development

1) Desirable effects

Tourism has become a major industry in many developing countries, which stimulates not only national, but also regional growth in various ways.

From the national standpoint, tourism development is expected to offer the following benefits:

- Foreign exchange earning,
- Promoting regional development,
- Generation of recreational benefits.

On the other hand, from the regional standpoint, tourism development is likely to bring:

- Creation of job opportunities in tourism business,
- Encouragement of other industrial sectors, and
- Improvement of infrastructures.

In order to secure the above-mentioned broad effects, there is a need to intensify regional industrial relations and to improve the regional self-supply system as far as possible, so that the living standards of local people can be improved through multiplier effects of the tourism development projects.

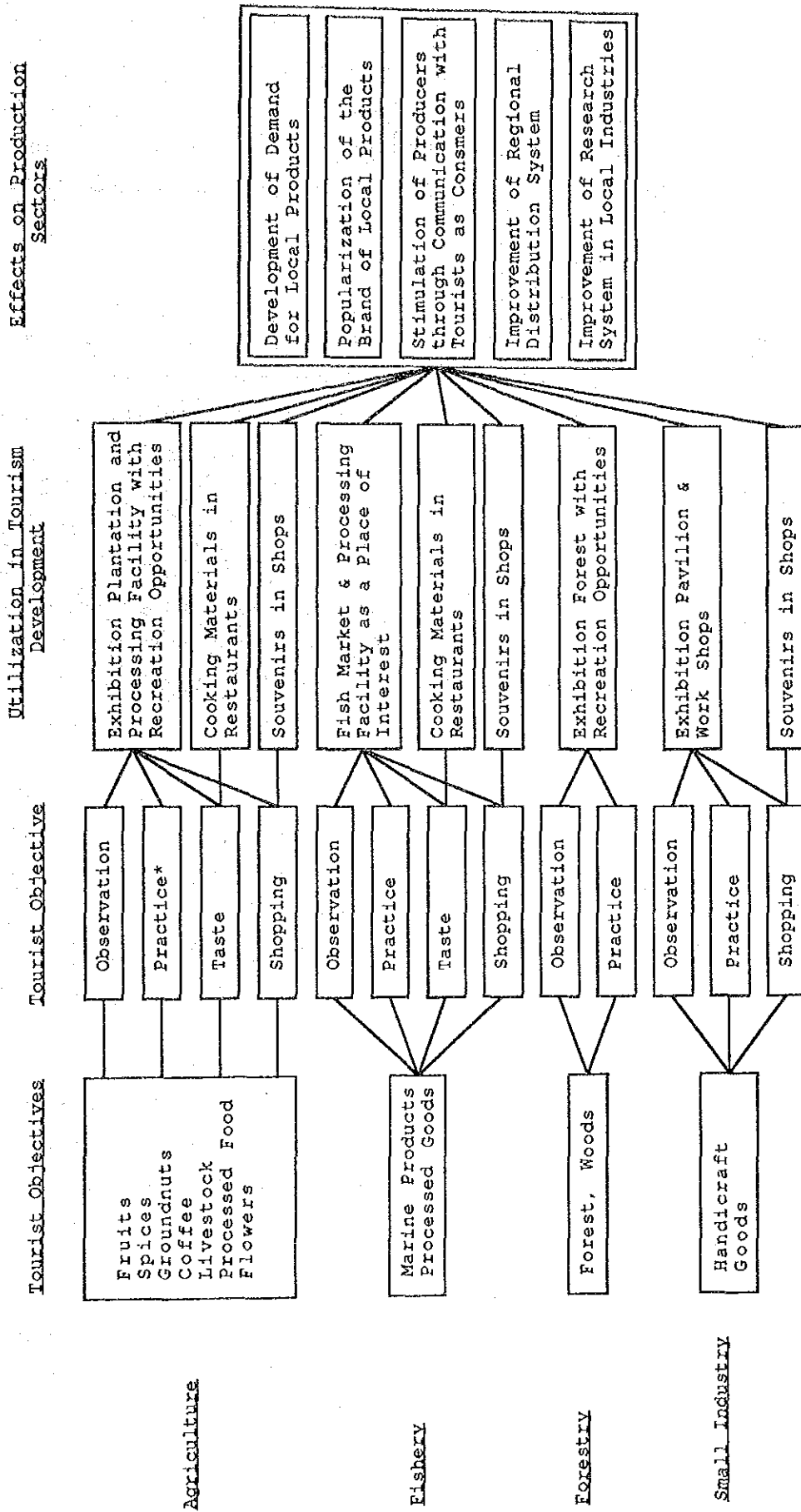
In this connection, much attention has to be paid to utilization of other industrial sectors as well as the existing tourist resources. Fig. 4-4 shows the promising material in other industrial sectors and the possibilities for their utilization in tourism development.

Furthermore, considering the educational situation for local people in the study region, it is also necessary to create opportunities for educating and training them so as to get better jobs in tourism projects.

2) Other effects

Other effects of the tourism development are analyzed in Section 6.4.2. As for the adverse impacts, the counter-measures are proposed in the implementation programme of each Project.

Fig. 4-4 PRODUCTION SECTORS IN TOURISM DEVELOPMENT AND ITS EXPECTED EFFECTS



* Operation Practice for Pleasure

4.3.2 Development potential of tourism

The development potential of tourism in the study region has been assessed by tourist activity as follows (see Fig. 4-5).

1) Nature observation

There are several nature reserves of very high quality with an abundance of objects for nature observation. The Sunda Straits also provide many sites for studying the effects and ecological succession resulting from the explosion of Krakatau in 1883.

Among these sites, Ujung Kulon is the most famous and interesting with such animals as the one-horned rhinoceros and Banteng. It also has exceptionally important coral reefs. It is, however, located far from the tour base on the west coast and it takes time and expense for visits.

The Krakatau Islands themselves are interesting places for naturalists and researchers interested in ecological succession and the geological process of volcanos.

Pulau Dua is a famous bird sanctuary, but bird watching activities and visiting times are hampered by the characteristics of the area.

As for the Rawa Danau, it should be left in its natural environment. The priority must be accorded to preservation of water resources and tourism has to be controlled.

In summary, it can be said that nature observation will contribute to promoting a diversification of tourism in the region. However, sites suitable for nature observation are located at remote areas.

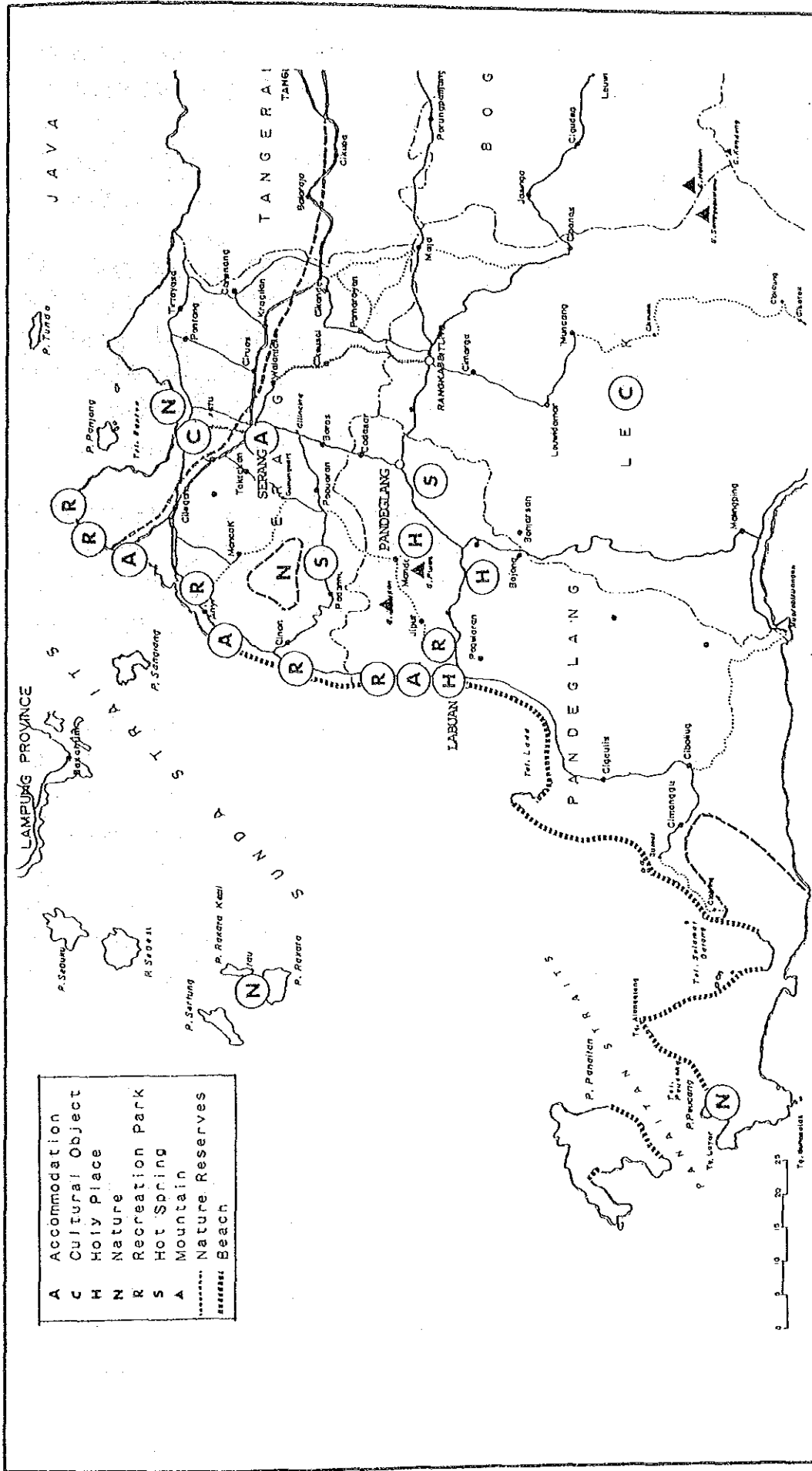


Fig. 4-5
TOURIST RESOURCES

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In such conditions, it is more appropriate to improve existing facilities and administration than to develop new large scale tourist resorts.

2) Marine oriented recreation

Although the sea and beaches along the coast are somewhat affected by turbidity from the coral reefs and increasing private development, the surroundings are still pleasant and water suitable. The accessibility from Jakarta, the largest market will be greatly improved after the completion of the Jakarta-Merak Highway.

Nevertheless the sea and beaches are the most popular attractions for both domestic and foreign tourists. Consequently, it can be said that there is the clear possibility of developing a variety of viable marine resorts on the west coast.

As for Peucang, Panaitan and Handeuleum Islands, although they abound in marine recreation resources, they should not be developed as marine resorts because of their disadvantage in accessibility and infrastructure. Priority should be given to nature observation as mentioned later. The disadvantage in inaccessibility, however, is an advantage in view of nature conservation and full benefits of the advantage should be given in management of the asset and promotion of their attractions.

3) Sightseeing

Sightseeing consists of activities searching for tourist attractions and is characterized by round trip excursions.

The most notable object for sightseeing is the Krakatau Island, which have a famous history as well as interesting

geographical features. They can attract both foreign residents and tourists if its accessibility is improved.

Although the historic relics of Old Banten attract a million visitors as pilgrims, their superstructures, and surroundings are less impressive for sightseers than those observed in such regions as Yogyakarta and Bali.

They could, however, become one of the objects for sightseeing in the study region if efforts for other improvements in addition to the restoration works in progress are realized.

As for socio-cultural resources, there are some interesting entertainments such as debus (self-defence dances) and traditional instrumental music. But in the present situation, there are few opportunities for visitors to enjoy their performance.

If a combination of dances, music and other arts are well organized and periodically performed, they could be one of the tourist objectives for sightseers as well as sojourners in marine resorts.

Local industries such as agriculture, fisheries and handicrafts also can provide stopover places on tours as seen in the art villages of Bali Island [the details to be referred to Chapter 4 of Annex I(C)].

4) Conventions

A convention, in the context of this report, is a gathering of people, members or delegates, to specific assemblies for political, social, professional or religious purposes. The importance of attracting conventions to a particular city or centre is realized by the tourist industry and is strongly supported by many governments the world over. For example, the Government

of Singapore has enacted an implementation programme to declare Singapore as an international convention city.

To become a convention city and be accepted as such, many prerequisites are required. It is necessary to realize and maintain the following facilities and locational conditions:

- A convention center (and exhibition center),
- International standard hotels,
- Preparation of an attraction programme during conventions,
- Provision of attractive tourist resorts for after convention excursions,
- Establishment of a convention bureau and congress organizer body,
- Introduction of information functions such as interpretation, typing and copying, publications, communications, etc.,
- Presence of travel agencies,
- Provision of transportation facilities,
- Others including interior decoration, events, souvenir shops, advertisement agencies, banks, recruitment facilities, etc.

In Indonesia except for Jakarta, Bandung and Bali, few places can meet such requirements. In this context, the study region should aim to become a destination for small and informal conventions or an excursion destination after conventions held in Jakarta rather than to become a large and formal convention center itself.

To attract small conventions and post-convention tours, it is recommended that interesting places should be developed for sightseeing and that international class hotels and restaurants be established. It is also necessary to develop and maintain good connections with convention bureaux and congress organizers in Jakarta to promote these projects.

5) Other recreational activities

Besides the above mentioned activities, there are good possibilities for hot spring bathing and outdoor recreation such as picnics, camping and hiking.

Hot springs in the study region serve mostly for local needs as public baths, but it is necessary to exploit their remedial use along with the introduction of recreational programmes in order to develop and to promote this new aspect of tourism in Indonesia.

Outdoor recreation is becoming popular especially among the younger generation and this could attract a wider following in future.

There are good opportunities for providing outdoor recreating centers to facilitate a variety of activities and each creating a specific identity. There are several suitable places for such kind of development in the study region.

6) Pilgrimages

Pilgrimages are undertaken to holy places in the study region. The objects themselves are, of course, outside the scope of development projects, but improvement of their surroundings and access roads is needed to encourage this form of tourism

Pilgrimage when accompanied by agreeable tourist destinations for domestic use often leads to recreation after visiting the object of the Pilgrimage.

In this context, tourism development can be consistent with the promotion of pilgrimage, if it is well organized.

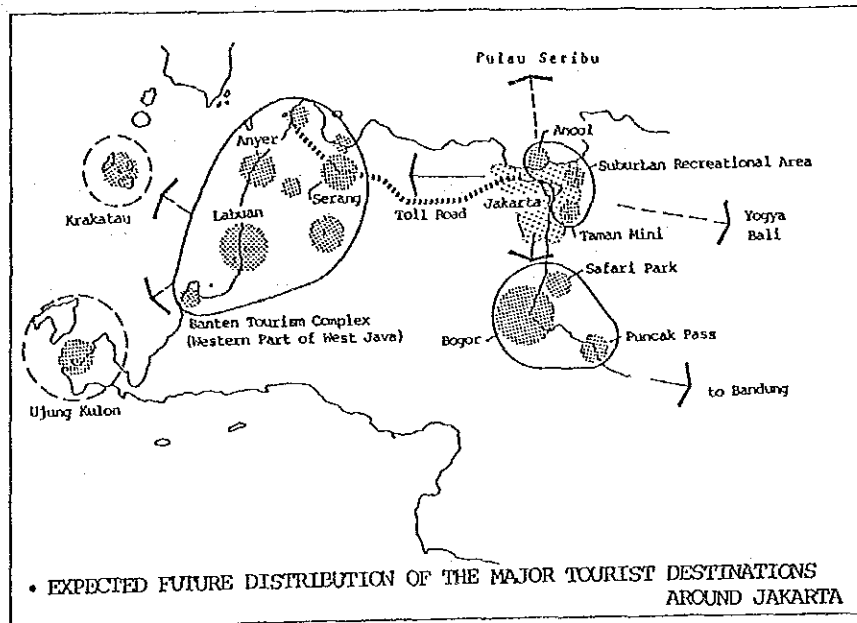
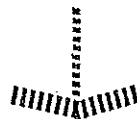
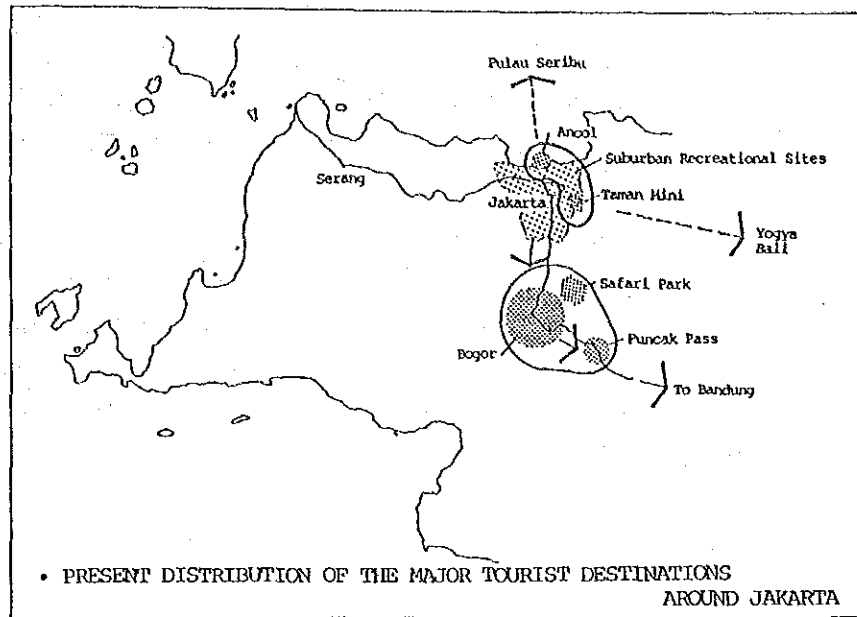
4.3.3 Direction of tourism development

1) The macroscopic view of the study region

In the earlier discussion of international tourism it was observed that Bali functions as the principal gateway and tourist destination in Indonesia. However, to promote international tourism further in Indonesia the following efforts are now needed.

- To intensify the functions of other gateways, especially Jakarta as the capital city of the Republic of Indonesia.
- To develop satellite tourists destinations around the above gateways in order to provide more and diversified attractions for tourists.
- To consolidate shuttle flights between those gateways for the improvement of inter-city transportation and to encourage longer stays by foreign visitors.

From such a standpoint, the study region is expected to become one of the excursion objectives from Jakarta even a main destination for international tourists, such being the growing world wide interesting tropical beach vacations in remote places coupled with intense interest in tropical rainforests of which Ujung Kulon is the most famous example [see Fig. 4-6].



Source : THE JICA STUDY TEAM



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Fig. 4-6
PRESENT AND EXPECTED FUTURE
DISTRIBUTION OF THE MAJOR TOURIST
DESTINATIONS

Such view should also be taken into consideration for domestic tourism because it is necessary to distribute the tourist demand generated in Jakarta to other directions than eastward and southward where tourist destinations are already crowded with visitors and roads are jammed with cars at weekends and holidays.

In the light of the above, it is clear that tourism development in the study region could play an important role in the macroscopic aspects of tourism development in Indonesia.

2) Direction of tourism development

In view of the scarcity of prominent tourist resources in the study region, it would not seem appropriate to develop major tourist destinations. Such direction is not recommended, because the development effects would not spread throughout the region.

Consequently, it is seen to be essential to promote tourism as an engine of regional growth, to develop diversified destinations of various identities and to attract tourists by accumulated interest in the whole region.

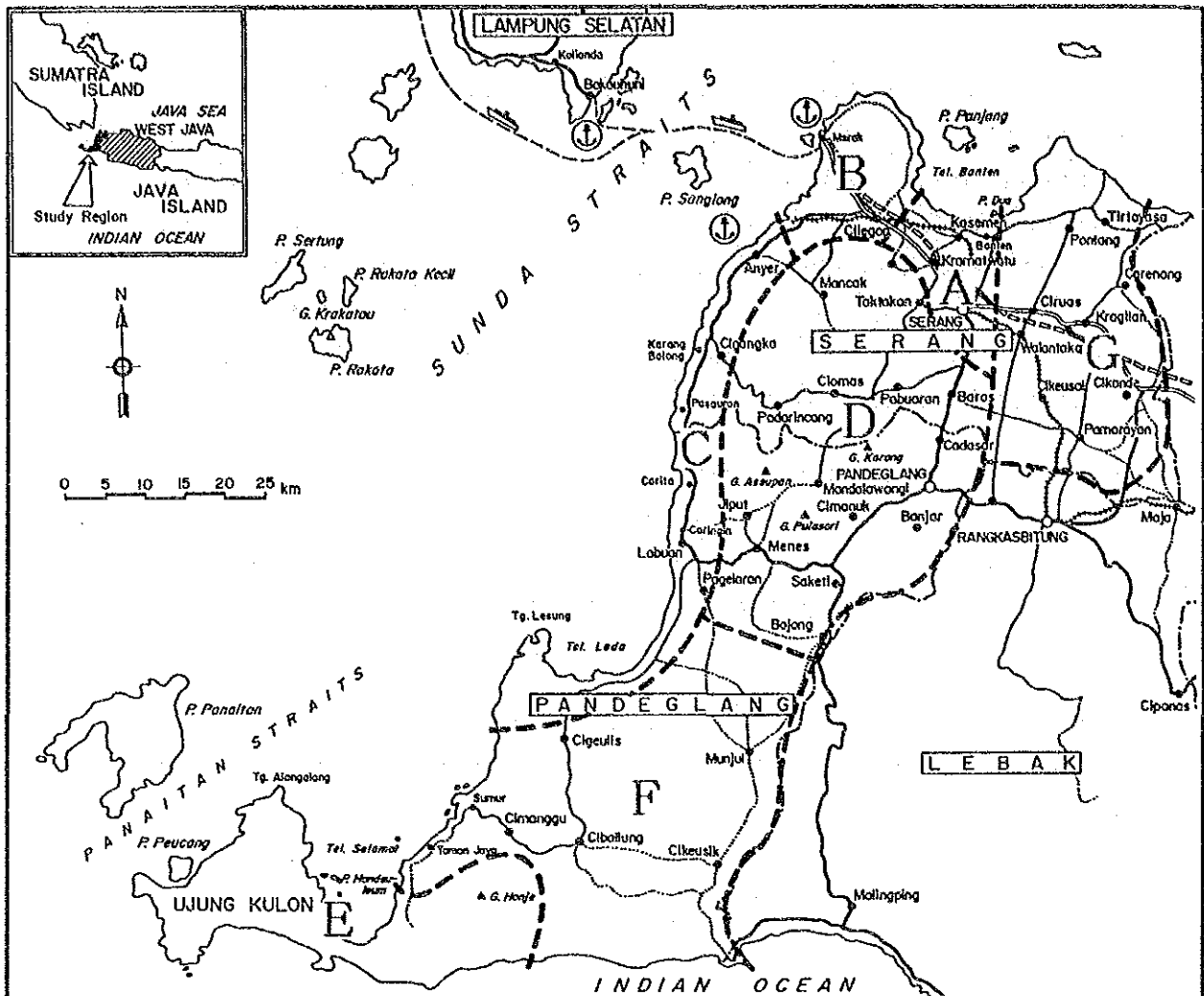
The theme of each identity should not be limited to inherent resources such as beaches and historic assets, but should be sought in other industrial sectors for their utilization and promotion.

The following principles are, therefore, proposed as the direction for tourism development:

- For inherent resources, the sea, beaches and Krakatau Islands should be focussed on, using also historic relics and ethnic cultures such as arts and entertainments.

- Among other sectors, plantations, livestock, fisheries, their processing industry and handicraft have, to some extent, potentials as tourist attractions. It is, however recommended to put emphasis on their potentials for observation and recreation aspects as well as on the consumption of local products, so that the benefits can be felt not only in the tourism industry, but also in other industrial sectors.
- Most of the nature reserves are precious, but not suitable or attractive for mass tourism because of their characteristics and remote locations. Accordingly, priority should be given to conserving them as resources for researchers, naturalists and others.
- The tourist destinations of the above identities needed to be linked together for establishment of tourist routes.

As for the basic direction of tourism development by area, Fig. 4-7 can be referred to as a proposal.



Code	Area	Basic Direction
A	Old Banten	To make better use of socio-cultural resources as well as historical relics.
B	Northern Tip	To develop and improve small-scaled recreation parks along the beach utilizing its advantageous location near the end of the Jakarta-Merak highway.
C	West Coast	To establish a marine resort area with a variety of tourist attractions.
D	Northern Inland	To exploit the local industries as well as its natural environment in order to establish tourist route.
E	Western Tip	To promote nature oriented activities with consideration to nature conservation.
F	Southern Inland	To preserve as a buffer area and watershed management for future development.
G	East Plain	To promote its agricultural activities while preserving its desirable landscape.

LEGEND

- Coast Line
- - - Kabupaten Boundary
- Kabupaten Capital
- Kecamatan Capital
- Other Place
- ▲ Mountain
- == National Road
- National Road (construction)
- Provincial Road
- Rural Road (reliable)
- Rural Road (unreliable)
- Railway
- ⚓ Ferry
- ⚓ Toll Road
- ✈ Airport
- ⚓ Port



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Fig 4-7
BASIC DIRECTION OF TOURISM DEVELOPMENT
BY AREA