EXECUTIVE SUMMARY


The idea of sustainable development that has been applied to tourism as sustainable tourism is a complex term and encompasses other sectors besides tourism itself: economic, social, cultural and environmental. Nevertheless, sustainable tourism is applicable, measurable and can be applied by any individual or related group to tourism who are willing to participate and be effective in a sustainable way.

As the concepts of sustainable tourism have been established by developed countries, there is a challenge to assess this concept and its implementation in the context of the developing world. Toraja as one of tourist destinations in Indonesia, has a great potential of resources and attractions. It also has experienced the results of successful touristic marketing in the past, but since year 2001, Toraja was facing multiple challenges due to the continuous decline of the number of tourist arrivals until now.

There are three objectives of this study: (1) to identify the current situation of tourism in Toraja by using value chain approach, (2) to discover the gap between evaluated experience of tourists (domestic and international) with three other stakeholders: entrepreneurs, residents and government officials, (3) to assess the possible strategies to assist the entrepreneurs and government officials to develop Toraja as a sustainable tourist destination in the future. To meet these objectives, a field study was undertaken in Toraja, as a case study, and current relevant literature was reviewed. This study examines the current situation of tourism in Toraja with a close look at stakeholders’ perceptions towards tourism in Toraja during February and March 2010. A sample of stakeholders: tourists (domestic and international), residents, entrepreneurs and government officials are included in the process of the research. A small workshop with representatives of stakeholders was set up as focus group discussions, followed by a dept interview, and a questionnaire for three stakeholder groups inquiring about their perceptions of tourist destination experience in Toraja.

The performance of value chains was measured on the basis of the five drivers of value chain development: system efficiency, product quality, product differentiation, social and environment standard, and enabling business environment. Six ‘As’ components of a destination with each characters are also applied in the performance measurements: attractions (natural, man-made, artificial, purpose built, heritage, special events), accessibility (entire transportation system comprising of routes, terminals and vehicles), amenities (accomodation and catering facilities, retailing, other tourist services), available packages (pre-arranged packages by intermediaries and principals), activities (all activities available at the destination and what consumers will do during their
The gap analysis with the equation: Gap = (tourists’ experiences) – (entrepreneurs/residents/government officials perceptions of tourists experiences) as part of efforts toward a sustainable tourism destination to investigate the difference between the most directly involved parts of destination, tourists (international and domestic) with three other stakeholders in tourism: entrepreneurs (tourism supply or service providers), residents and government officials. This analysis is conducted in order to get a clear and correct perception of what tourist experience is towards planning and management of sustainable tourism in Toraja.

Identification of current Toraja tourism value chain map reveals that there are four main actors in the Toraja tourism: end markets (domestic and international tourists), travel agents, service providers (hotel, restaurants/cafe, transport, tour guide, souvenir shops, handicraft producers, traditional houses, traditional wedding ceremonies, historical and cultural sites, cliff burial sites, traditional burial ceremonies and other attraction, etc and inputs (suppliers of food, textile, toiletries, etc). There are four categories of attractions in Toraja tourism (1) features in the natural environment: beautiful panorama with rice terraces, bamboo trees with a backdrop of blue misty mountains such as in Batutumonga which is located on the slope of Sesean mountain, (2) historical and cultural attraction: traditional houses with buffalo horns, rice barns, cliff burial sites hanging graves, carved graves, stone graves, megalith stone for funeral ceremony, coffins hanging on the wall of the cliff, (3) special interests: trekking activities along the beautiful scenery and rafting along Sa’dan river or Mai’ting river, and (4) special event: ceremonies of wedding and funeral, art festivals, weekly animal market, traditional markets, traditional weaving.

Results from gap analysis reveals that entrepreneurs hold a relatively precise knowledge of international tourists’ travel pattern. While the answer from residents and government officials are generally the same as the answer from domestic tourists. Gaps were detected among the stakeholders in the case of travel party composition, booking form and factors influencing decision to travel. For tourist behaviour at the destination, there are gaps in the case of activities during stay, tourists trade type and average daily expenses. While the gaps of domestic tourists behaviour with the answers according to entrepreneurs, resident and government officials are in the case of type of transportation, visit reason and nights stayed at accommodation. Statistically significant differences of means was found between international tourists and entrepreneurs, residents and government officials with regards to overall satisfaction from food services, transportation and the accommodation services at the destination. Significant difference of means was also found as part of t-test and chi square test between international tourists and government officials concerning overall satisfaction and between domestic tourists and residents concerning destination service assessment.

International tourists display positive attitudes towards the destination. Entrepreneurs, residents and government officials have an accurate knowledge of tourists attitude. And a return to Toraja was considered likely by 28 per cent of international tourists and 57.6 per cent of domestic tourists, while 32 percent of
international tourists are very likely to return to Toraja and 21.2 per cent of domestic tourists have the same intention.

The four features for tourism to be truly sustainable as cited by Hobson and Essex (2001) from Beioley (1995) can be developed as a vision for Toraja tourism.

1. Tourism in Toraja must respect the economic well-being and social and cultural concerns of communities in Toraja. Based on the composition of Gross Domestic Regional Product (GDRP), the tourism sector as part of trading, hotel and restaurant is in the fifth rank with the contribution of 7.5% to Toraja GDRP means from the economic point of view the contribution of the tourism sector for local economy is very low. Consequently, tourism development in Toraja must involve consultation and participation as well as a degree of local control by creating the conducive business environment for the local entrepreneurs to play an important role. As Toraja tourism value chains do not exist in isolation but become lodged in a complex social, economic, political and cultural environment which will determine the success of the tourism business. The nearest environment for the small and medium enterprises in tourism business in Toraja are tourists, labour, skills and technology, information, networks and capital while the wider environment are society and culture, regulation and bureaucracy, government and politics. These environments need to be developed by involving the stakeholders where the Tourism Office as government officials can be the bridge amongst the stakeholders group by organizing the periodical meeting and training.

2. Tourism must respect the character of Toraja environment and operate within its capability to regenerate itself. Natural beauty is one of the strong character of Toraja environment. Tourism activities especially the special interest of tourist related an encounter with the environment such as trekking activities and rafting along Sa’dan and Mai’ti ng rivers have to maintain the environment.

3. Tourism in Toraja should reduce its impact on the wider global environment in terms of depletion of natural resources and pollution. Global warming as one of the global issue should be considered by Toraja tourism in sustainable development of Toraja tourism by adopting the environmental friendly process in tourism activities and practice recycle, reuse and reduce products in daily business activities.

4. Tourism should provide meaningful and satisfying experience for the visitor (tourists). Destinations have to focus on facilities and services designed to meet the needs of the tourists. The ‘six As framework’: attractions, accessibility (transportation), amenities (accommodation, food services and tourism trade), available packages, activities and auxiliary services have to meet the needs of the tourists arriving in Toraja.

The research determined that there is a need for a better understanding of the customers’ (tourists) perspective in order to consistently deliver good service toward Toraja as a sustainable tourist destination. Action plan matrix with the key areas of development and detailed activities, responsible agents of change and key partner can help the stakeholder groups to develop Toraja as a sustainable tourist destination in the future. And there are incentives for the market players in the value chain and for the stakeholder groups when they actively involve in
developing Toraja as a sustainable tourist destination by improving the communication and coordination amongst the actors and stakeholder groups.

Regarding the declining of tourists arrived in Toraja, based on results from focus group discussion with stakeholder groups (entrepreneurs and government officials), observations, the depth interview with stakeholders (entrepreneurs, residents and government officials) and 109 usable questionnaires from the stakeholders (entrepreneurs, residents and government officials) is caused by five interrelated reasons in order of urgency: (1) international and national security issues, (2) transportation problems to arrive in Toraja due to the limited transportation facilities and infrastructure, (3) lack of promotion, (4) lack of quality and facilities in the destination, and (5) lack of coordination amongst stakeholder groups in Toraja, at the provincial and national level.

The promotion of the diversity of the tourists products needs to be improved, so far, most of the promotions underline the uniqueness of the funeral rites while Toraja has more to offer especially the natural beauty of the environment. The promotion through brochures/leaflets, web sites/internet and advertisement in media needs to reveal the order of importance of tourists attractions in term of sustainability.

There are practical recommendation from the tourists that needs to be followed up by the stakeholder groups under the coordination of Tourism office as the agent of change: formation of local guides, involvement of local population as craftsmen, restoring and maintaining sites, cleaning up the sites and putting up litter bins, manufacturing of more artful souvenirs instead of selling cheap stuff, mass tourism has to be avoided in any case, the construction and repairing of an adequate road network, minibuses circulating between hotels and various tourist sites, the publication of brochures and tourist guide books to be consulted by tourists before their arrival at Toraja, the sites like the burial cliffs have to be maintained, in order to raise money to provide such an infrastructure, entrance fees can be levied.

Although the concept of sustainable tourism is a complex term and encompasses other sectors such as: economic, social, culture and environment in a long term perspective, hence sustainable tourism can be put into practice by any individuals or related groups to tourism in Toraja. Starting with their willingness to participate and being effective in a sustainable way then being actively involved in the developing of Toraja tourism as an integrated system while at the same time maximizing their role in the system. And finally, future research needs to be done to complement this study especially regarding the impact of the tourism to the local community and carrying capacity assessment of tourist arrival in Toraja toward a sustainable tourist destination.

Keywords: tourism destination, sustainable tourism, stakeholder, value chain, gap analysis