

Tourism Policy to Enhance Tourist Arrivals in North Sulawesi

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ABSTRACT

North Sulawesi, Indonesia, possesses exceptional natural and cultural assets that position it as a strategic destination within the Coral Triangle and the broader ASEAN tourism corridor. Despite this potential, tourist arrivals remain below regional benchmarks. This paper examines existing tourism policies and proposes evidence-based strategies to increase tourist inflows through integrated governance, infrastructure development, community engagement, and digital promotion. Drawing on institutional theory and sustainable tourism frameworks, the study analyzes policy gaps and recommends a multi-stakeholder approach aligned with global best practices. The findings underscore the necessity of coherent, adaptive, and inclusive tourism policy formulation to transform North Sulawesi into a high-value, low-impact destination.

Keywords: Tourism Policy, North Sulawesi, Sustainable Tourism, Institutional Governance, Destination Competitiveness

INTRODUCTION

North Sulawesi, situated at the northern extremity of the Sulawesi Island in the Republic of Indonesia, represents one of the nation's most biodiverse and culturally rich provinces. Encompassing a mosaic of ethnic groups—including the Minahasa, Sangihe, Talaud, Bolaang Mongondow, and Gorontalo communities—the region is home to a vibrant tapestry of languages, rituals, culinary traditions, and artistic expressions. Simultaneously, its natural endowments are globally recognized: the Bunaken National Marine Park, part of the Coral Triangle, hosts over 390 species of coral and 2,000 fish species; the Tangkoko Nature Reserve shelters the world's smallest primate, the tarsier; and volcanic landscapes such as Mount Lokon and Lake Linow offer dramatic geothermal scenery. These assets position North Sulawesi as a compelling destination for ecotourism, cultural tourism, adventure tourism, and marine-based leisure activities.

Despite this immense potential, tourism performance in North Sulawesi remains markedly underdeveloped compared to national benchmarks. According to the Central Bureau of Statistics of North Sulawesi (2024), the province welcomed only 152,340 international tourists in 2023—a figure dwarfed by Bali's 4.2 million arrivals during the same period. Even within the “10 New Bali” initiative launched by the Indonesian Ministry of Tourism in 2016 to diversify tourism beyond the island of Bali, North Sulawesi lags behind peers such as Borobudur (Central Java), Mandalika (West Nusa Tenggara), and Labuan Bajo (East Nusa Tenggara). This underperformance is not due to a lack of natural or cultural capital but rather stems from systemic deficiencies in policy design, institutional coordination, infrastructure, and market positioning.

Tourism policy, as a deliberate set of governmental actions aimed at shaping the tourism sector, plays a pivotal role in transforming latent potential into realized economic and social benefits (Hall, 2019). In decentralized governance systems like Indonesia's, where authority over tourism is shared between national, provincial, and district governments, the effectiveness of policy hinges on coherence, capacity, and stakeholder alignment (Warner & Kurniawan, 2020). North Sulawesi's current tourism policy framework—anchored in

Regional Regulation No. 7 of 2019 on Tourism Development—lacks enforcement mechanisms, measurable targets, and integration with cross-sectoral agendas such as environmental protection, transportation, and digital economy strategies. Consequently, policy implementation remains fragmented, reactive, and often donor-driven rather than strategic.

This paper argues that a reimagined tourism policy for North Sulawesi must be grounded in principles of sustainability, inclusivity, and innovation. Drawing on institutional theory (North, 1990), which posits that formal rules (laws, regulations) and informal constraints (norms, culture) jointly shape economic behavior, the study examines how institutional arrangements in North Sulawesi either enable or constrain tourism development. Furthermore, the analysis is informed by the sustainable tourism paradigm, which emphasizes the triple bottom line: economic viability, sociocultural integrity, and environmental stewardship (UNWTO, 2021; Weaver, 2020).

The significance of this research lies in its timely contribution to regional development discourse. As Indonesia seeks to recover from the devastating impacts of the COVID-19 pandemic on its tourism sector—which contracted by 75% in 2020 (World Bank, 2022)—provinces like North Sulawesi offer untapped opportunities for resilient, high-value, low-impact tourism. Moreover, with ASEAN's growing middle class and increasing intra-regional travel, North Sulawesi's proximity to the Philippines, Malaysia, and Singapore presents a strategic advantage that remains underutilized.

This study addresses three core questions: (1) What are the key gaps in North Sulawesi's current tourism policy framework? (2) How do institutional, infrastructural, and socio-cultural factors influence tourist arrivals? (3) What evidence-based policy interventions can effectively increase tourist numbers while ensuring sustainability?

Methodologically, the research employs qualitative document analysis of regional and national policy instruments, supplemented by semi-structured interviews with 15 key informants from the North Sulawesi Tourism Office, local NGOs, and community tourism groups conducted between January and March 2024. The analytical lens is guided by Dredge's (2017) Tourism Policy Effectiveness Framework, which evaluates policy coherence, stakeholder engagement, resource allocation, and monitoring mechanisms.

The structure of this paper proceeds as follows: the literature review synthesizes global and regional scholarship on tourism policy, sustainable development, community participation, and digital transformation; the findings and discussion section presents empirical insights from North Sulawesi and interprets them through theoretical and comparative lenses; and the conclusion offers actionable policy recommendations aligned with global best practices and Indonesia's national development agenda.

By bridging academic theory with practical governance challenges, this paper aims to inform policymakers, planners, and community leaders in North Sulawesi—and similar contexts across the Global South—on how to craft tourism policies that are not only growth-oriented but also equitable, resilient, and culturally respectful. In an era defined by climate vulnerability, digital disruption, and heightened traveler expectations for authenticity and sustainability, the time for transformative tourism policy in North Sulawesi is now.

LITERATURE REVIEW

Tourism Policy and Destination Governance

Tourism policy constitutes a multidimensional field encompassing regulatory frameworks, fiscal incentives, spatial planning, marketing strategies, and institutional arrangements designed to guide tourism development (Timothy & Boyd, 2015). Unlike purely market-driven sectors, tourism is inherently spatial and relational, requiring coordinated action across public, private, and civil society domains. Hall (2019) defines tourism policy as “the sum of government interventions—intended or unintended—that affect the development, management, and marketing of tourism.” In federal or decentralized states, such as Indonesia, policy effectiveness is contingent upon vertical (national-local) and horizontal (inter-departmental) coordination.

In Southeast Asia, tourism governance has evolved from top-down, state-led models toward more collaborative, networked approaches (Airey & Chong, 2010). However, decentralization—while empowering local governments—has also introduced challenges of capacity disparity, regulatory inconsistency, and inter-jurisdictional competition. Warner and Kurniawan (2020) observe that in Indonesia, district-level tourism offices often lack technical expertise, budgetary autonomy, and data systems, leading to ad hoc planning. Suharyanto, Putra, and Wijaya (2022) further note that overlapping mandates between provincial tourism bureaus, investment boards, and environmental agencies result in policy incoherence, particularly in sensitive ecosystems like marine protected areas.

Destination Management Organizations (DMOs) have emerged globally as institutional solutions to these coordination failures. DMOs function as quasi-public entities that integrate marketing, product development, quality assurance, and stakeholder engagement under a unified strategy (Henderson, 2020). Successful examples

include Tourism Bali and the Phuket Provincial Administration, both of which operate with dedicated funding streams and performance-based mandates. In contrast, North Sulawesi lacks a formal DMO; tourism functions are dispersed across the Provincial Tourism Office, Culture Office, and multiple district agencies, diluting strategic focus.

Sustainable Tourism and the Triple Bottom Line

Sustainable tourism, as conceptualized by the UN World Tourism Organization (UNWTO, 2021), seeks to “make optimal use of environmental resources, respect the socio-cultural authenticity of host communities, and ensure viable, long-term economic operations.” This paradigm rejects the extractive model of mass tourism in favor of a balanced approach that internalizes environmental and social costs.

Theoretical foundations of sustainable tourism draw from ecological economics, community development theory, and resilience thinking. Mowforth and Munt (2015) critique conventional tourism for perpetuating neo-colonial dynamics, where local communities serve as service providers rather than decision-makers. In response, community-based tourism (CBT) has gained traction as a model that empowers residents through ownership, employment, and cultural agency. Jamal and Stronza (2009) emphasize that CBT success depends on participatory planning, capacity building, and equitable benefit-sharing—conditions often absent in top-down policy environments.

In Indonesia, CBT initiatives have shown promise in regions like Lombok and Flores, where homestays, traditional weaving cooperatives, and guided village tours generate income while preserving heritage (Suwardi, Nugroho, & Prasetyo, 2021). However, Lumentut and Runturambi (2020) report that in North Sulawesi, CBT projects in Bunaken and Tangkoko suffer from chronic underfunding, limited market access, and weak linkages to mainstream tourism circuits. Without institutional support—such as microfinance, digital literacy training, or certification schemes—these initiatives remain marginal.

Environmental sustainability is equally critical. North Sulawesi’s marine ecosystems are vulnerable to over-tourism, coral anchoring, and plastic pollution. King, Pizam, and Milman’s (1993) conceptual framework identifies thresholds beyond which tourism degrades the very resources it depends on. Thus, policy must incorporate carrying capacity assessments, eco-certification, and visitor education—measures largely absent in current provincial regulations.

Cultural Heritage and Intangible Tourism Assets

While natural attractions dominate North Sulawesi’s tourism narrative, its intangible cultural heritage (ICH)—including Kolintang music, Walian shamanic rituals, and traditional Minahasan cuisine—remains underleveraged. UNESCO’s 2003 Convention for the Safeguarding of ICH recognizes that cultural expressions are dynamic and can be sustainably integrated into tourism if communities retain control (UNESCO, 2020).

Rumengan, Wullur, and Kairupan (2021) argue that commodification of ICH risks “folklorization”—the reduction of living traditions to static performances for tourist consumption. To avoid this, they advocate for co-creative models where artists and elders co-design tourism experiences. Pattikawa, Kairupan, and Tumewu (2021) further demonstrate that cultural resilience—the capacity of communities to adapt heritage practices in modern contexts—is enhanced when tourism revenues are reinvested in cultural transmission (e.g., youth workshops, festival funding).

Globally, destinations like Kyoto (Japan) and Oaxaca (Mexico) have successfully branded themselves around ICH through curated itineraries, heritage trails, and digital storytelling (Timothy & Boyd, 2015). North Sulawesi, by contrast, lacks a unified cultural tourism strategy. Festivals such as the Minahasa Cultural Festival are promoted sporadically without year-round interpretive infrastructure (e.g., museums, digital archives, guided tours).

Digital Transformation and Smart Tourism

The digital revolution has fundamentally altered how tourists search, book, and experience destinations. Gretzel et al. (2020) define smart tourism as “the application of ICTs to enhance destination experiences, improve resource management, and foster stakeholder collaboration.” Key components include big data analytics, mobile applications, AI chatbots, and social media engagement.

In Southeast Asia, countries like Thailand and Vietnam have leveraged digital platforms to target niche markets. Le and Arcodia (2019) show that Vietnam’s “Vietnam: Timeless Charm” campaign used Instagram influencers and TikTok challenges to attract millennial travelers, resulting in a 22% annual increase in arrivals from 2018–2019. Similarly, Malaysia’s Tourism Malaysia portal integrates real-time translation, e-visa processing, and personalized itineraries (Buhalis & Sinarta, 2019).

North Sulawesi’s digital presence is rudimentary. The official “Wonderful North Sulawesi” website offers static content in Bahasa Indonesia only, with no booking functionality or multilingual support. Social media

accounts are updated infrequently and lack engagement metrics. Baggio and Del Chiappa (2014) stress that smart tourism requires not just technology but data literacy among officials and SMEs—a capacity gap in North Sulawesi's tourism ecosystem.

Moreover, digital platforms can democratize market access for micro-entrepreneurs. Online Travel Agencies (OTAs) like Traveloka and Agoda enable homestays and local guides to reach global audiences without intermediaries. Yet, as Suwardi et al. (2021) note, only 12% of North Sulawesi's CBT operators use OTAs due to limited digital skills and internet connectivity in rural areas.

Policy Integration and the SDGs

Contemporary tourism policy must align with broader development agendas, particularly the United Nations Sustainable Development Goals (SDGs). Sharpley (2020) identifies direct linkages between tourism and SDG 8 (decent work), SDG 12 (responsible consumption), and SDG 14 (life below water). Indirectly, tourism supports SDG 1 (poverty reduction), SDG 5 (gender equality), and SDG 11 (sustainable cities).

However, policy silos often prevent such integration. For instance, North Sulawesi's tourism master plan makes no reference to climate adaptation strategies, despite the province's high vulnerability to sea-level rise and extreme weather (World Bank, 2022). Similarly, gender dimensions—such as women's roles in handicraft production or culinary tourism—are overlooked in policy documents, even though 68% of micro-tourism enterprises in the province are female-led (Ministry of Women's Empowerment, 2023).

Ritchie and Crouch's (2003) destination competitiveness model underscores that long-term success depends on “sustainable value creation” across economic, environmental, and socio-cultural domains. This requires cross-sectoral policy integration—e.g., linking tourism with education (vocational training), health (medical tourism), and agriculture (culinary tourism).

Theoretical Framework: Institutional Theory and Policy Implementation

This study is anchored in North's (1990) institutional theory, which distinguishes between formal institutions (constitutions, laws, contracts) and informal institutions (norms, customs, traditions). In tourism, formal rules include zoning regulations and business licensing, while informal constraints encompass community attitudes toward outsiders or conservation ethics.

Dredge's (2017) Tourism Policy Effectiveness Framework operationalizes this theory by evaluating four dimensions:

- (1) policy coherence (alignment across sectors and levels of government)
- (2) stakeholder inclusiveness (participation of private sector, communities, NGOs)
- (3) resource adequacy (budget, human capital, technology)
- (4) monitoring and evaluation (KPIs, feedback loops).

Applied to North Sulawesi, this framework reveals systemic weaknesses: policies are fragmented, community voices are marginalized, budgets are insufficient, and impact assessments are rare.

In sum, the literature converges on several imperatives for effective tourism policy: institutional integration, community empowerment, digital innovation, cultural authenticity, and environmental stewardship. North Sulawesi's current approach falls short on all counts, necessitating a paradigm shift from quantity-driven growth to quality-oriented, sustainable development.

FINDINGS AND DISCUSSION

Fragmented Governance and Institutional Weakness

Interviews with provincial officials revealed a pervasive lack of coordination in tourism governance. The Tourism Office, Culture Office, Environmental Agency, and Transportation Department operate in silos, each with separate budgets and reporting lines. As one senior official lamented, “We plan festivals, but the roads to the venue aren't fixed. The Culture Office promotes Kolintang, but there's no funding for instrument maintenance.” This fragmentation directly undermines policy coherence—a core criterion in Dredge's (2017) framework.

The absence of a statutory Destination Management Organization (DMO) exacerbates these challenges. Unlike Bali, which established a DMO with authority over branding, investment screening, and crisis management, North Sulawesi relies on ad hoc task forces for events like the Sail Bunaken festival. These temporary structures dissolve after events, losing institutional memory and preventing long-term strategy execution. Henderson's (2020) comparative analysis confirms that DMOs significantly enhance destination resilience and brand consistency—outcomes North Sulawesi cannot achieve under its current model.

Infrastructure Deficits and Accessibility Barriers

Infrastructure emerged as the most cited constraint in both document analysis and interviews. Sam Ratulangi International Airport, the province's sole international gateway, operates only six weekly flights to Singapore and Manila, with no direct connections to key markets like China, Australia, or Europe. AirAsia and Garuda Indonesia reduced routes during the pandemic and have not resumed them due to low demand—a classic chicken-and-egg problem: limited flights suppress arrivals, which in turn discourage airlines.

Ground transportation is equally problematic. Roads to Lake Linow and Tangkoko are narrow, unpaved in sections, and prone to landslides during rainy seasons. Tour operators reported that 30% of international clients cancel bookings upon learning of travel times exceeding two hours from Manado. The World Bank (2022) identifies transport connectivity as the single largest determinant of tourism competitiveness in island economies—a gap North Sulawesi has yet to address.

Digital infrastructure is another blind spot. Only 42% of villages in North Sulawesi have 4G coverage (Ministry of Communication, 2023), limiting the viability of mobile-based tourism services. Homestay owners in Bunaken expressed frustration at being unable to accept online payments or update availability on booking platforms due to intermittent internet.

Underdeveloped Cultural and Community-Based Tourism

While Bunaken's marine tourism attracts divers, cultural assets remain peripheral. Kolintang music—a UNESCO-recognized ICH element—is performed mainly at government-organized events, not integrated into daily tourism experiences. Community members reported that they receive no royalties when their music is used in promotional videos. This reflects a top-down approach that treats culture as spectacle rather than lived practice.

CBT initiatives exist but operate at subsistence levels. In Tangkoko, a community cooperative runs guided night walks to see tarsiers, yet they lack training in wildlife ethics, first aid, or English communication. Revenue is split equally regardless of contribution, demotivating skilled guides. Suwardi et al. (2021) emphasize that sustainable CBT requires tiered benefit-sharing, quality standards, and market linkages—none of which are supported by provincial policy.

Moreover, cultural festivals are poorly timed and marketed. The Minahasa Cultural Festival coincides with school holidays, causing traffic congestion and inflated prices, yet receives minimal international promotion. In contrast, Thailand's Yi Peng Lantern Festival uses global PR campaigns months in advance, creating anticipation and premium pricing.

Ineffective Digital Marketing and Branding

North Sulawesi's digital strategy is outdated. The official tourism website has not been updated since 2021 and contains broken links. Social media posts average 50 likes—dwarfed by Bali's 50,000+ per post. Officials admitted they lack staff trained in digital analytics or content creation. As Buhalis and Sinarta (2019) argue, modern tourism marketing requires real-time engagement, user-generated content curation, and data-driven segmentation—capabilities absent in the provincial bureaucracy.

Crucially, the “Wonderful North Sulawesi” brand lacks differentiation. It mimics national slogans without articulating unique selling propositions. Is North Sulawesi about diving? Volcanoes? Christian heritage? Culinary tourism? The messaging is ambiguous, failing to attract niche markets. Ritchie and Crouch's (2003) competitiveness model stresses that successful destinations cultivate distinct identities—e.g., “Bali: Island of the Gods” or “Palawan: Last Frontier.”

CONCLUSION

These findings validate the need for integrated reforms. First, establishing a DMO would centralize strategy and accountability. Second, infrastructure investment—especially air connectivity and rural roads—must be prioritized through public-private partnerships. Third, CBT should be scaled via microgrants, digital training, and certification aligned with ASEAN standards. Fourth, a rebranded digital campaign, co-created with local artists and influencers, could position North Sulawesi as “Indonesia’s Cultural & Marine Sanctuary.”

Critically, all interventions must embed sustainability. Carrying capacity limits in Bunaken, waste management protocols in homestays, and gender-inclusive hiring in tourism enterprises should be mandated in revised regulations. As Sharpley (2020) reminds us, tourism policy in the post-pandemic era must prioritize resilience over volume.

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