

REPORT

Towards a Roadmap for Inclusive Business in Wellness Tourism in Indonesia



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Inclusive Business Action Network

The Inclusive Business Action Network (iBAN) is a global initiative supporting the scaling and replication of Inclusive Business models. Through its strategic pillars iBAN blue and iBAN weave, iBAN manages an innovative online knowledge platform (www.inclusivebusiness.net) on inclusive business and offers a focused Capacity Development Programme for investment seeking companies and policymakers in developing and emerging countries.

iBAN creates a space where evidence-based knowledge transforms into learning and new partnerships. With its focus on promoting the upscale of Inclusive Business models and consequently improving the lives of the poor, iBAN is actively contributing to the achievement of the United Nations Sustainable Development Goals.

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EXECUTIVE SUMMARY

English

Inclusive Businesses offer triple wins for the poor, the private sector and for society and need supportive ecosystems to thrive and scale. Inclusive businesses (IBs) provide goods, services, and livelihoods on a commercially viable basis, either at scale or scalable, to people living at the base of the economic pyramid (BOP) making them part of the value chain of companies' core business as suppliers, distributors, retailers, or customers.¹ IBs are companies that use innovative business models to include low-income people and marginalised communities along their value chain for mutual benefits. For low-income populations, IB models create income generation opportunities above the market rate and/or expand access to essential goods and services. For companies, IB models may offer higher-profit business and investment opportunities, help reduce risks, develop new markets and foster innovation. For governments, IBs help create jobs and address essential needs of the poor, low-income and vulnerable people. IBs need a supportive enabling business environment (ecosystem) to thrive and scale. In accordance with the G20 Inclusive Business Framework² and the ASEAN Inclusive Business Framework,³ an enabling environment for IBs requires information, rules, financial resources, and capacity. Although IB is primarily a private sector activity, a variety of stakeholders, including the government, have an important role to create a conducive ecosystem for IB.

Tourism is a priority sector for the Government of Indonesia and plays an important role for economic growth and employment creation. Indonesia has diverse and rich landscapes and natural ecosystems that position the country as an attractive destination for tourists. In 2018, tourism was responsible for 10.3 per cent of the total employment in Indonesia and over 6 per cent of national GDP.⁴ Because of a significant increase in foreign visitors since 2016, these numbers were expected to increase until the COVID-19 pandemic hit the tourism sector in early 2020. In 2019, the President of Indonesia selected tourism as one of priority sectors because of its strong potential for higher economic growth, its catalytic effect on other industries, and its contribution to more inclusive growth.

Wellness tourism has the potential to further increase the competitiveness of the tourism sector in Indonesia and drive inclusive economic growth. Compared to its regional competitors, the tourism sector in Indonesia outperforms on natural resources and price competitiveness, but is weaker in sustainability, tourist service infrastructure and health and hygiene.⁵ Wellness tourism has the potential to increase the competitiveness of Indonesia's tourism sector, because it requires high-value products and services and can significantly increase spending per tourist. In addition, wellness tourism has the potential to drive inclusive growth, because it actively promotes sustainability practices and engages local communities to create authentic wellness and cultural experiences. Before COVID-19 hit the tourism economy hard, wellness tourism was on the rise, globally and in the Asia-Pacific region; expenditures in wellness tourism were growing twice as fast as in general tourism.⁶ Rebuilding the tourism sector will likely take several years. As tourism recovers, wellness tourism might continue to increase its relative importance, as natural areas are expected to drive recovery. Yet, wellness tourism will also need to respond to the increasing importance of domestic tourism, which is more price sensitive; and to the increasing demand for safety and hygiene. Indonesia was the second largest market for wellness tourism in Southeast Asia (after Thailand) with 1.3 million direct employees, USD 6.9 billion expenditure in 2017 and an annual rate of 21.5 per cent from 2015-2017.⁷

The Government of Indonesia selected wellness tourism as a pilot sector for promoting inclusive business. Because of the strategic relevance for inclusive economic growth, the Government of Indonesia selected the wellness tourism as a pilot sector for promoting IB in the country. Against this background, the Ministry of Cooperatives and SMEs officially requested United Nations ESCAP – in the context of its IB capacity building work for ASEAN member countries – to assist the Government of Indonesia in designing a roadmap for promoting IB in wellness tourism. For that purpose, this report presents an analysis of the enabling environment for IB in wellness tourism, highlights selected IB

models in the sector that could serve as good practice examples, and outlines recommendations for a possible roadmap for promoting IB in wellness tourism in Indonesia. Indonesia can build on existing IB models in the wellness tourism sector and initiatives that promote IB in tourism, including from GIZ.

Currently, national stakeholders have limited knowledge and information on IB practices and limited capacity to engage in or promote IB in wellness tourism in Indonesia. The analysis of the enabling environment for IB in the wellness tourism sector in Indonesia suggests that businesses, government and local communities alike have limited knowledge and information on how to successfully operate or facilitate IB models in the wellness tourism. In terms of rules, the analysis reveals that some existing policies and regulations in the tourism sector are conducive for IB practices, but limited compliance with regulations can jeopardise the quality of wellness tourism and no specific incentives exist to promote IB in the sector. Financial resources to promote IB in wellness tourism exist on national and local government level as well as on business level, but resources are rarely used to promote IB in the sector. The capacity of low-income people and local communities to participate in wellness tourism is limited, especially on hygiene, sanitation and safety standards for homestays, local cuisine and transportation. In addition, the skills mismatch between vocational training graduates and job requirements calls for developing research and training in specific wellness skills and traditions, expanding training online, staff duties and languages, and promoting more practical training and work placements.

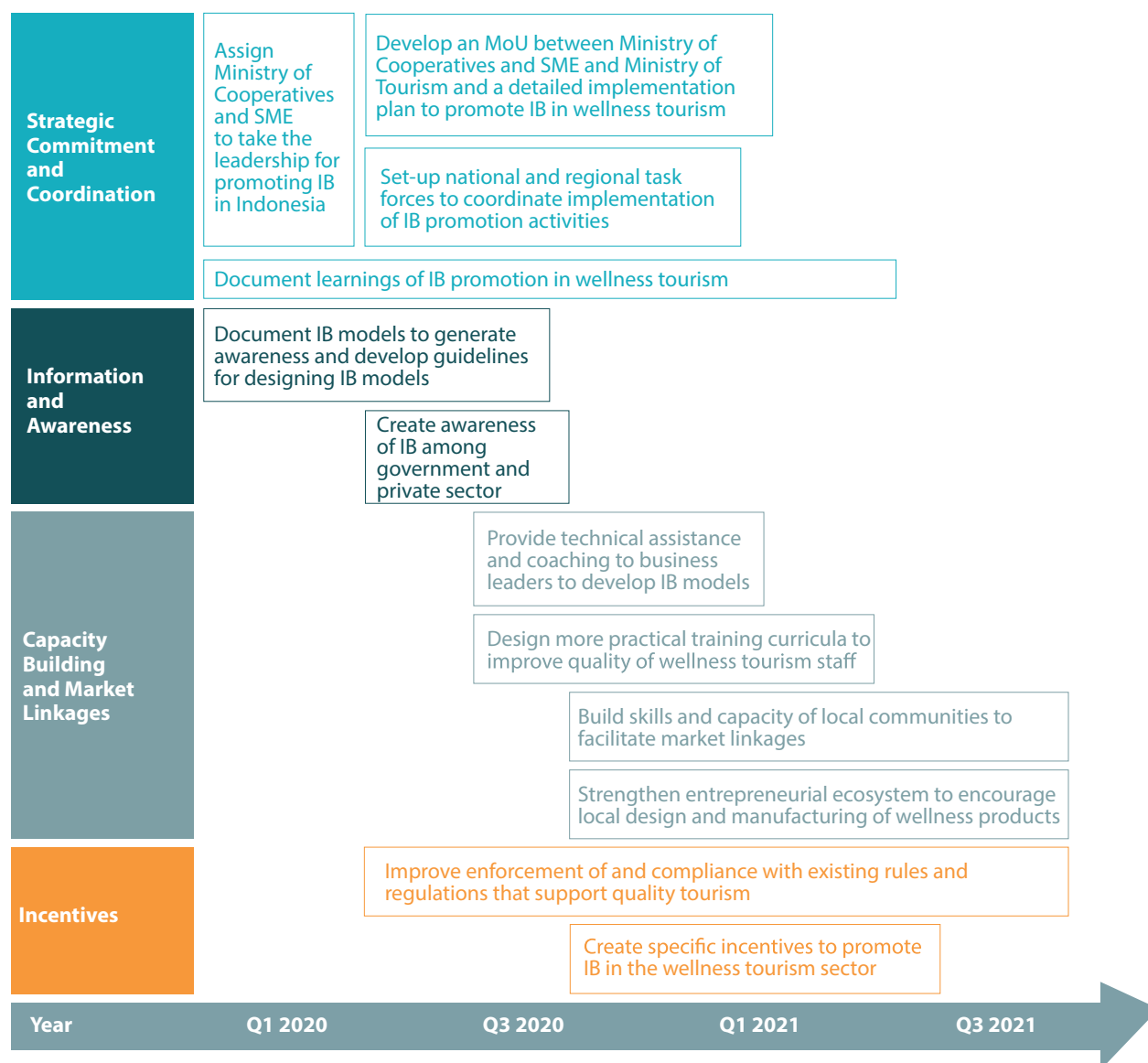
A roadmap to effectively promote IB in the wellness tourism sector in Indonesia would require interventions in four strategic areas. The first step is to take the strategic decision at high-level if promoting IB in wellness tourism will be a priority for the Government of Indonesia. Moving forward, an intergovernmental steering group under the leadership of the Ministry of Cooperatives and SMEs and the Ministry of Tourism and Creative Economy should further develop and concretise the initial ideas highlighted under each strategic intervention area and the activities outlined in the roadmap (see figure). The roadmap should be implemented by government actors, business associations and other stakeholders, some of which have already expressed strong interest in supporting IB efforts in the wellness tourism sector.

The four strategic intervention areas to promote IB in the wellness tourism sector in Indonesia include:

- 1. Strategic commitment and coordination:** Nominate and assign key government champions to lead on the promotion of IB in Indonesia. According to the stakeholder consultation workshop, the Ministry of Cooperatives and SMEs would be best placed to drive IB in Indonesia. Ministry representatives have already signalled their interest to play a leadership role. In the case of promoting IB in wellness tourism, the work should be done jointly with the Ministry of Tourism and Creative Economy. To effectively promote IB in the wellness tourism sector, stakeholders should create a task force or steering group that includes IB focal points from key government agencies, local level government, private sector, business associations and academia.
- 2. Information and awareness:** Raise awareness around the opportunities and positive financial, social and environmental impact of IB models in wellness tourism among government stakeholders and industry players and investors. Actors could promote information through publications, good practice case studies, guidelines for developing IB models, workshops on the role of governments to facilitate IB, and awards for the best IB models in the (wellness) tourism sector.
- 3. Capacity building and market linkages:** Provide technical assistance and capacity building support to increase the quality of IB models and the capacity of low-income people to engage with the private sector. This should include technical assistance to business leaders on developing IB models, for example through business coaching, peer-learning and international exposure visits. It should also include active facilitation of market linkages and Public Private Partnerships (PPPs) as well as capacity building support for local communities at destination level, including on technical and entrepreneurship skills.

4. **Incentives:** Identify incentives that encourage the replication and scale-up of existing IB models in wellness tourism and facilitate traditional wellness companies to become more inclusive. This could include the establishment of IB incentives provided by the government. For businesses, relevant incentives might include tax incentives that encourage training initiatives for the BOP, local sourcing of food and non-food wellness products, or regulations that promote decent employment conditions of local community members. For government officials at national and local level, relevant incentives might include a specific IB mandate or key performance indicators (KPIs) for promoting IB and the enforcement of regulations that support quality tourism.

Initial Roadmap to Promote IB in Wellness Tourism along four Strategic Intervention Areas



Source: United Nations ESCAP, Note: Q1 and Q3 refer to the quarters of the year.

Note: Following the impact of COVID-19 on the tourism sector, the timeframe will need to be reviewed.

The implementation of IB in Wellness Tourism Roadmap will become the role model for Indonesia to further promote IB in other sectors.

EXECUTIVE SUMMARY

Bahasa Indonesia

Bisnis Inklusif memberikan manfaat tiga kali lipat bagi kalangan masyarakat miskin, sektor swasta, dan kelompok sosial serta membutuhkan ekosistem pendukung untuk tumbuh dan berkembang. Bisnis Inklusif / Inclusive Businesses (IB) memberikan barang, jasa, dan mata pencaharian yang layak secara komersil, baik yang sedang berkembang maupun berpotensi untuk lebih berkembang, bagi masyarakat yang berada pada dasar piramida ekonomi (BOP) dengan menjadikan mereka bagian dari rantai nilai bisnis inti perusahaan baik sebagai penyedia barang, distributor, pedagang, maupun konsumen. Bisnis inklusif adalah perusahaan-perusahaan yang menggunakan model bisnis inovatif dengan melibatkan masyarakat berpendapatan rendah serta kaum marjinal dalam rantai nilai sehingga mendapatkan manfaat bersama. Bagi masyarakat berpendapatan rendah, model IB menciptakan peluang menghasilkan pendapatan di atas rata-rata dan/atau memperluas akses pada barang atau jasa pokok penting lainnya. Bagi perusahaan, model IB menawarkan kesempatan bisnis dengan keuntungan lebih besar, peluang investasi, membantu mengurangi resiko, menciptakan pangsa pasar baru serta membantu pengembangan inovasi. Bagi pemerintah, IB membantu menciptakan lapangan kerja dan sebagai media menyampaikan pesan kebutuhan pokok bagi masyarakat miskin, rentan, dan berpendapatan rendah. IB membutuhkan lingkungan usaha (ekosistem) pendukung sehingga memungkinkan bisnis untuk berkembang dan lebih meningkat lagi. Sesuai dengan G20 Inclusive Business Framework dan ASEAN Inclusive Business Framework, lingkungan yang kondusif bagi IB membutuhkan informasi, regulasi, sumber finansial, dan kapasitas. Walaupun secara mendasar IB adalah aktivitas bisnis pada sektor swasta, namun berbagai para pihak terkait, termasuk pemerintah, memiliki peran penting dalam menciptakan ekosistem yang kondusif untuk pengembangan IB.

Pariwisata adalah salah satu sektor prioritas bagi Pemerintah Indonesia serta berperan penting dalam peningkatan ekonomi dan menciptakan lapangan kerja. Indonesia memiliki bentang alam yang kaya dan beragam serta ekosistem alami yang memposisikan Indonesia sebagai destinasi yang menarik bagi wisatawan. Pada 2018, sektor pariwisata memberikan kontribusi lebih dari 10.3 persen dari total penyerapan lapangan kerja di Indonesia dan lebih dari 6 persen dari GDP Nasional. Angka tersebut diperkirakan akan meningkat lebih tinggi pada tahun-tahun yang akan datang sebagai dampak dari peningkatan kunjungan wisatawan mancanegara yang signifikan sejak tahun 2016, hingga pandemi Covid-19 memukul sektor pariwisata pada awal 2020. Pada 2019, Presiden Indonesia memilih pariwisata sebagai salah satu sektor unggulan karena berpotensi bagi pertumbuhan ekonomi dan menjadi katalis pada industri terkait lain, serta menjadi sektor prioritas untuk mencapai pertumbuhan yang lebih cepat dan inklusif.

Wellness tourism (wisata kebugaran) berpotensi meningkatkan daya saing pada sektor pariwisata di Indonesia dan mendorong pertumbuhan ekonomi yang inklusif. Dibandingkan

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