

Strengthening the Tourism Promotion Strategy in Priority Destinations for Lake Toba

Marhanani Tri Astuti

*Ministry of Tourism and Creative Economy / Strategic Study of Tourism and
Creative Economy, Jakarta*

Author's email: Marhananitria@kemenparekraf.go.id;

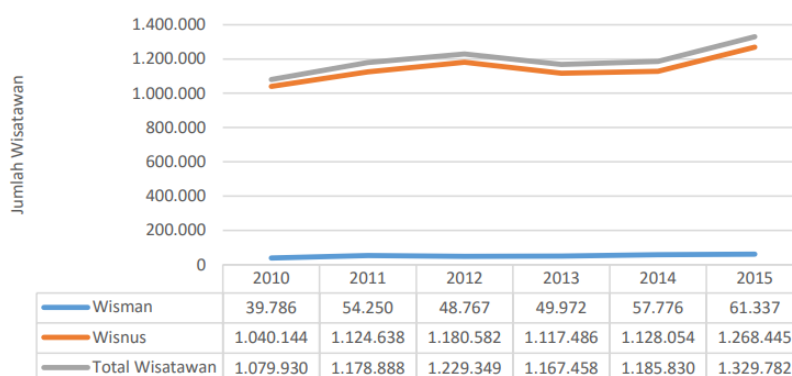
Corresponding Author : marhananitriastuti@yahoo.co.id

Abstract. *Tourism management has a positive impact on the economy, environment, and socio-culture both locally and nationally. One indicator of the success of tourism performance is the increase in the number of foreign and domestic tourist visits. Lake Toba is one of Indonesia's tourist destinations that has the charm of natural and cultural beauty. Lake Toba is designated as a priority destination in Indonesia. The number of foreign tourist visits to Lake Toba reached 270,292 people in 2017. However, in the following year, foreign tourist arrivals decreased 14% to 231,465 people. Likewise, domestic tourist visits reached 14.04 million in 2017, and decreased to 12.14 million people. Therefore, efforts are needed to increase tourist visits by strengthening tourism promotion strategies in Lake Toba Priority Destinations. This study uses a qualitative descriptive methodology. Data collection is done through literature study, research reports, and other sources. The results of the research required efforts to strengthen tourism promotion strategies in Lake Toba Priority Destinations, including through branding destinations. Promotional efforts carried out by the government through destination branding programs can include the Tourism Association, academics, media and the public.*

Keywords: *Lake Toba promotion, branding destinations, priority destinations*

1. INTRODUCTION

Lake Toba is the largest caldera lake in the world, located in North Sumatra Province. Lake Toba is the largest lake in Indonesia and is also a volcanic-tectonic caldera (giant volcanic crater). As the largest tectonic volcano lake in the world, this makes Lake Toba a tourist attraction in North Sumatra. Lake Toba has been designated as one of the 10 priority tourism destinations by the Ministry of Tourism. It is known the number of tourist visits to Lake Toba as follows:



Sumber: Dinas Pariwisata Kabupaten Toba Samosir, 2016

Based on the graph of the number of tourist visits to Lake Toba, it is known that tourist visits have increased. The Ministry of Tourism of the Republic of Indonesia projects that tourist visits to Lake Toba in 2019 will reach 1,000,000 for foreign tourists. With the various uniqueness of Lake Toba, North Sumatra Province and the tourism conditions of Lake Toba, it is important to have a marketing strategy and be supported by the creation of a brand as one of the important factors in marketing activities because the activities of introducing and offering products and services cannot be separated from a reliable brand. This means that the brand does not stand alone. The brand must match the other components of the marketing process, including the product marketing mix tools. The role of the brand is important because it differentiates a product from its competitors, so it depends on the brand displayed. The creation or development of the right brand requires marketing research related to the suitability of the brand with the product, the destination manager brand, the brand with the values the destination wants to convey. (source: Executive Summary Basic Research STP Bandung 2016)

The number of foreign tourists visiting reached the highest point in 2017, namely 270,292 people. However, the following year the number of foreign tourists visiting Lake Toba actually fell 14% to 231,465 people. On the other hand, domestic tourist visits (wisnus) to the largest volcanic lake in the world grew higher with an average of 25%. The number of foreign tourists who came to Lake Toba reached 9.71 million people in 2015 then increased to 14.04 million people in 2017. However, in 2018 the number of foreign tourists visiting also fell 14% to 12.14 million people. (source: <https://databoks.katadata.co.id>)

In an effort to increase the number of foreign tourists visiting Indonesia, the Government uses a Promotion Strategy, namely a promotional strategy, among others, through the branding of Lake Toba. Branding efforts are made to strengthen the image of Indonesian tourism in the minds of tourists, especially in increasing the growth and number of tourist visits according to the target to be achieved.

Destination creates an identity as a differentiator from other destinations. Through a brand in a destination, communication between tourists and destinations will be created. Destination brands create differentiation from other destinations which can be the basis for creating a destination's excellence. Communicating the brand is important in creating a destination position to attract tourists to visit a destination (Morison, 2007). In line with branding destinations, (Kartajaya, 2005) argues that currently local governments must metamorphose into local governments that are customer-oriented and accountable to all stakeholders in a balanced manner.

Various benefits can be obtained from a strong brand, as stated by Hoeffler and Keller (2006), namely improving product quality, increasing customer loyalty, reducing market competition, increasing profits, increasing the number of buyers and increasing communication effectiveness. One of the advantages of building a strong brand is increasing effective marketing communication. In general, the result of a strong brand is that consumers will have the desire to communicate on a brand, communication activities will be more

attractive and have the power to react to the brand. The strength of a brand will affect advertising activities as the achievement of communication goals or the brand as a mediator to achieve corporate communication goals (Keller, 2006).

The benefits of communication can only be generated from a strong brand (Keller, 2006). Building a strong brand is a priority in the management process (Aaker and Kapferer in Keller, 2006). To build a strong brand requires knowledge of structures that can be accepted by consumers so that a positive response from marketing activities can achieve the expected goals. Marketing communication plays an important role in shaping consumers to understand the marketing program of an organization (Keller, 2006). To manage the brand effectively, a destination needs to be able to target the target tourists, create a strong brand identity and differentiate it from other brands in the market (Lascu and Amesquit, 2011).

Destination brand shows the identity of a destination or a place. Destination brands are also believed to have potential and play a role in the development of a destination. Branding is also believed to have the potential and plays a role in the development of a destination.

Priority activities that are focused on tourism are: 1) Continuing to increase tourism investment and develop tourism destinations through the 3 A program (Attractions, Accessibility and Amenities). 2) Development activities for international and domestic tourism marketing through the BAS approach (Branding, Advertising and Selling) and Promotion Strategy and higher education development in tourism in 6 regions (Medan, Palembang, Bandung, Bali, Lombok and Makassar) (Source: cnnindonesia.com).

The provincial government of North Sumatra targets foreign tourist visits (tourists) to reach 300,000 people by 2020, this figure is up 7.14% from the target of foreign tourist visits in 2019 of 280,000 people.

Judging from the level of foreign visits in 2017 there were 270,292 and there was a 2018 decline of 231,465, so promotional efforts are needed to increase foreign tourist visits to Lake Toba.

Lake Toba in North Sumatra is expected to use inclusive branding in its promotion so that priority tourist destinations are able to attract foreign tourists (tourists). (Source: cnnindonesia.com) Tourism Office of North Sumatra Province, Lake Toba Tourism Office, Marketing Directorate of the Ministry of Tourism and Creative Economy.

1.1 Lake Toba Tourism Market Conditions

Lake Toba has been designated by the central government as one of the leading destinations in Indonesia, even the President of the Republic of Indonesia, Jokowi, paid special attention to Lake Toba. However, tourism has not been going well in Simalungun Regency, North Sumatra. For example, Girsang Sipanganbolon Subdistrict, Parapat, Simalungun Regency reflects conditions that do not yet support tourism. The traditional market is supposed to be one of the attractions for tourists. The condition of tourist visits is currently decreasing, after Covid-19. Furthermore, the government strives to improve tourism infrastructure through RIDPP, the conditions for providing tourism services in Lake Toba include 5A components, namely attractions or attractions, activities, accessibility, accommodation and amenities.

1.1.1 Attractions

Attractions or Tourist Attractions (DTW) based on Law Number 10 of 2009 concerning Tourism is defined as everything that has uniqueness, beauty and value in the form of diversity of natural, cultural, and man-made assets that are targeted or purpose of tourist visits. Lake Toba is a unique DTW as a caldera area formed from the eruption of the Super Volcano about 74,000 years ago, the largest lake in Asia Southeast, and volcanic-tectonic with a length of 100 km, a width of 30 km, a depth of 505 meters and located at an altitude

of 904 meters above sea level (Master Plan and Detailed Plan The National Tourism Strategic Area of Lake Toba and its surroundings, 2012). Lake Toba area is the largest Quaternary Caldera in the world and makes it an important world heritage with a variety of geological, biological, and cultural diversity, which are also supported by attractions man made.

In 2019 the Toba Caldera was designated as a UNESCO Global Geopark (UGG) at the 6th Asia Pacific Geopark Network (APGN) event. Although the geosite has a high significance, there are no specific rules and policies for its protection. The development of the Toba Caldera Geopark has been harmonized in the Lake Toba RIDPP in accordance with the tourism development mission in Lake Toba.

The potential of the Lake Toba area resembles lake-based destinations in other countries, such as lakes Taupo in New Zealand and Lake Tahoe in America which have DTW for example hot springs, nature trekking, water tourism, historical heritage, tour around the lake, adventure tours, waterfalls, and so on. In the KTA which covers 31 Districts in the Lake Toba Area, there are approximately 127 DTW (Table 2.1). This number is likely to continue to grow, along with the identification of new places popularized as DTW.

Table 2.1 Tourist Attractions in Lake Toba

C	Toba Samosir	
1	Balige	Liang Siwege, Limestone Caldera Wall
2	(KTA 4)	Museum TB Silalahi
3		Batu Basiha Stone, Prismatic Joints, Andesitic Lava
4		Pantai Lumban Bulbul
5		Pasar Tradisional Onan Balerong
6		Makam Sisingamangaraja XII
7		Pantai Lumban Silintong
8	Tampahan	Desa Meat, Paleozoic Basement Caldera Wall dan aktivitas menenun
9		Bukit Tarabunga, panorama
10	Lagu Boti	Huta Tinggi Parmalim, wisata religi
11	Lumban Julu	Air Terjun Situmurun
12		Situmurun Uluhan Block
13		Taman Eden, Paleozoic Basement Caldera Wall
14		Eden 100 Botanical Garden
15		Desa Jangga Dolok, permukiman tradisional
16		Huta Bagasan, rumah tradisional
17	Ajibata	Desa Sigapiton
18		Future Sibisa Integrated Resort, Badan Pengelola Otorita Danau Toba (BPODT)
19		Bukit Gibeon, wisata religi

One of the main attractions in Lake Toba is its nature which stretches from East to West, from South to North, with various stretches in the form of lakes, rivers, hills, mountains, waterfall, forest, etc. This extraordinary view can be seen from various sides of the lake, namely from a point certain as a Panoramic View all the way in the form of a Scenic Road.

Some points enjoy Panoramic View and the Scenic Road line is already known as DTW, so there are already facilities for tourists. However most of these facilities need to be laid out for restore the existing scenic appeal.

The list of DTW Lake Toba is then grouped based on their advantages, as follows.

a. **33 Featured DTW (key attractions)**

DTW which has the highest rating in the group and is the strongest DTW to attract tourists. However, some DTWs are not included in the superior category even though they have high scores due to certain considerations, for example related to limited carrying capacity.

b. 70 DTW utama (*main attractions*)

DTW which has an intermediate group rating and is an important DTW to develop because of its strong appeal to attract tourists. All elements of the 16 geosites of the Toba Caldera are included in the main DTW category with the aim that their development can be carried out comprehensively and integratedly, and focused on the quality of the *geopark*.

c. 24 DTW Pendukung

DTW which is an attraction that supports DTW Unggulan and DTW Utama. The complete list of Lake Toba DTWs is shown in Table 2.2

1.1.2 Activities

Activities in DTW include a selection of tour activities offered to tourists. The entire DTW can serve all types of tourists, whether allocentric, midsentric, and psychocentric.

a. Alosentris

- 2) Camping: This activity is carried out in natural open spaces, including in Eden Park, Sidihoni Lake, Holbung Hill, and several other open spaces.
- 3) Water-based sports: canoeing and rafting. This activity can be found on recreational beaches such as the Bulbul Balige floor, Parbaba Samosir Beach, Parapat Free Beach, Tigaras Beach, and so on. Equipment for this activity is generally provided by local companies for rent. However, not all areas on the lake are suitable for water sports, while some are more suitable for rafting, or other activities that adventurers and millennials can do.
- 4) Paragliding: This sporting activity only attracts special interest tourists and is generally carried out when there are related events and competitions. The Lake Toba area suitable for this activity includes the Huta Ginjang in Muara and the Pakpak Bharat Government Office Area which is located on a hill.
- 5) Geological Tour: Lake Toba as a UNESCO Global Geopark has several geosites which can be explored by tourists interested in nature, and academic groups.
- 6) Hard hiking and trekking which are usually done by tourists in natural parks with quite challenging and varied terrain, such as Eden Park, Pusuk Buhit, Mount Sipisopiso, and so on. These areas have a lot of potential to be further developed through the provision of supporting infrastructure for Silimalombu Village and Camping on Lake Sidihoni.

b. Psychocentric

- 1) Sightseeing and relaxing: This activity can be found in almost every DTW, and is usually done with family and relatives to enjoy the beauty and coolness of nature.
- 2) Shopping: Almost all tourists are attracted to shopping, especially for souvenirs and local food. Local handicrafts and products can be found in tourism centers, such as Parapat, Tomok, Parbaba Beach and Balige.

- 3) Culinary: Tourists can enjoy local culinary delights, although the diversity and quality still needs to be improved, including the availability of a culinary center that is integrated with other attractions.

c. Midsentris

- 1) Cycling: This activity is usually carried out by tourists to enjoy nature around the central tourism area, such as Tuktuk. Tourists can cycle around Samosir Island.
- 2) Hiking (short distance): Tourists can do this activity, for example at Holbung Hill, or Lake Aek Natonang. Providing road signs on Samosir Island can also support the development of this light hiking activity.
- 3) Visiting DTW culture: Tourists can enjoy the beauty of cultural and historical heritage. This activity requires the support of translation services to increase tourists' understanding of cultural and historical heritage.
- 4) Boat cruising: On Samosir Island, one boat is available which can be chartered for cruises and other activities in the waters of the lake. In addition, there are also several boat owners who rent their boats for this activity with an all-day charter system. Most of the hotels on the Tuk-tuk of Samosir Island have boats for rent to tourists.
- 5) Water based recreation: waterpark, banana boat, and so on. In the waterfront area, there are a number of activities that tourists can enjoy, such as Water Fun Nine and banana boats in several locations such as Bulbul Beach and Parbaba Beach.

Marketing efforts that have been made include, among others, holding various festivals, carnivals and so on have become part of cultural and sports activities on Lake Toba. Cultural events offer a variety of cultural products, from music, dance, to agricultural products; while sports events focus on cycling, running, and so on. Both types of events are conducted at the local, regional, national or international level, or a combination of the four. In 2016 - 2019, five annual international cultural events will be held including the Samosir International Music Festival, Toba Caldera World Music Festival, International Tobatak Festival, 1st and 2nd North Sumatra International Choir Competition, Grand Fondo New York (GFNY) Championship Asia, and International Toba Kayak Marathon. Based on the trend of Lake Toba Calendar of Events in the 2016 - 2019 period, it can be concluded that the Lake Toba event tends to be held during the peak season, namely June - August which is the school holiday season and the end of the year. On the other hand, the number of events in low season is still limited.

1.1.3 Accessibility

Access to reach Lake Toba includes land, air and sea routes. Land access is connected to the tourism supporting road network (Tourism Relevant Road) which includes external and internal road access. External road access to support tourism is the road network to and from the Lake Toba Destination, while the internal tourism supporting road access is a road network that connects internally to the Lake Toba Destination.

Tabel 2.3 Jaringan Pergerakan Internal

Gate	Udara	Jalan Raya		Jalan Tol	Kereta Api	Danau
Silangit	v	v		-	-	-
Sibisa	v	v		-	-	-
Terminal A Kabanjahe	-	v		v	-	-
Terminal B Parapat	v	v		v	v	v
Terminal B Balige	v	v		v	-	v
Terminal B Muara	v	v		-	-	v
Terminal B Pangururan	-	v		-	-	-
Terminal B Sidikalang	-	v		-	-	-
Terminal B Salak	-	v		-	-	-
Terminal C Berastagi	-	v		-	-	-
Terminal C Simanindo	-	v		-	-	-

(Sumber: Ripda Danau Toba 2020-2045)

Land transportation routes in the external road network to reach Lake Toba are:

- Medan – Tebing Tinggi – Pematang Siantar – Parapat
- Kutacane (Provinsi Nangroe Aceh Darussalam) - Kabanjahe – Tongging
- Kutacane (Provinsi Nangroe Aceh Darussalam) - Sidikalang – Pangururan
- Rantau Prapat - Kisaran - Tebing Tinggi - Pematang Siantar – Parapat
- Rantau Prapat – Balige
- Sibolga - Tarutung – Balige

For air transportation routes, Lake Toba can be reached via Kualanamu Airport and Silangit Airport. Kualanamu Airport offers direct access to around twenty other destinations in Indonesia, particularly from provincial capitals in Sumatra (Palembang, Padang, Jambi, Pekanbaru and Banda Aceh) and major cities in Java (Jakarta, Bandung, Yogyakarta and Surabaya). Visitors from these cities need travel time from one to three hours of flight, followed by four to eight hours of road trip to reach their destination accommodation on Lake Toba. Silangit Airport offers shorter travel times via land than Bandar Kualanamu, but has fewer flight routes.

Tabel 2.4 Rute Kapal Ro-Ro Angkutan Danau Tahun 2018 dan Target 2045

No	Rute	Frekuensi (2018)	Frekuensi (2045)	Keterangan
1	Tigaras - Simanindo	5/ hari	7/ hari	-
2	Ajibata – Ambarita	4/ hari	8/ hari	-
3	Balige – Onan Rungu			Belum ada Kapal
4	Muara – Sipinggan Nainggolan			Belum ada Kapal
5	Muara – Sipinggan Nainggolan	2/ hari	8/ hari	Kapal Ro-Ro milik Swasta melalui pelabuhan Muara Putih milik swasta (2019)

(Source : Ripda Danau Toba 2020-2045)

For tourists who access Lake Toba by using sea transportation, it is facilitated through the Port of Belawan and the Port of Kuala Tanjung. The two ports accept cruises with travel times to Lake Toba which are almost the same as the travel time from Kualanamu Airport. Service improvements were carried out through the revitalization of 12 government-run ports around Lake Toba, namely: Tiga Ras, Ajibata, Balige, Muara, Marbun Toruan, Silalahi, Tongging, Sipinggan Nainggolan, Onanrungan, Ambarita, Simanindo and Porsea. Seven

ports have been renovated, and by the end of 2020 it is expected that the entire port will be completed. Three Ro-Ros owned by the community (private) also provide transportation services on Lake Toba, namely: Tomok Summersari, Sibandang, and Muara Putih.

It is hoped that the widening of the channel and the construction of the Tano Ponggol bridge will strengthen the land and lake transportation system. The plan to build a shipyard in Porsea to serve the repair and maintenance of all vessels operating on Lake Toba is expected to improve.

lake transportation safety followed by improvement of navigation systems and development of human resources. In line with the development of KTA in Lake Toba, several routes that can be added in the future are as follows.

Tabel 2.5 Identifikasi Kebutuhan Rute Tambahan

No	Rute	Jenis Layanan
1.	Merek - Silalahi	A
2.	Simanindo - Harang Gaol - Tigaras - Tongging	A
	Pangururan - Silalahi - Tongging - Haranggaol - Tiga Ras	A
	Pangururan - Simanindo - Pasir Putih Situngkir - Ambarita - Tomok	A
3.	Parapat - Pasir Putih Situngkir	A
4.	Balige - Onan Rungu	A/B
5.	Muara - Sipinggan Nainggolan	A/B
6.	Ambarita - Simanindo - Pangururan - Sipinggan Nainggolan - Onan Rungu - Tomok - Ambarita (Cruise Lingkar Dalam)	A
7.	Ajibata - Balige - Muara - Pangururan - Silalahi - Tongging - Haranggaol - Tiga Ras - Ajibata (Cruise Lingkar Luar)	A

Keterangan: A = Rute Pariwisata; B = Rute Kapal Barang

1.1.4 Accommodation

In Sumatra in 2020 Figures, the number of star and non-star hotels in North Sumatra is 388 accommodation units with 8,369 rooms. Most of the accommodations (51 percent) are in Karo District, especially in Berastagi and Samosir District, particularly in Tuk-Tuk. Most of the accommodations are non-star hotels (92.5 percent). Star hotels are mostly located in Karo and Simalungun (Parapat) Regencies. Other districts such as North Tapanuli, Humbang Hasundutan, Dairi, and Pakpak Bharat have more limited accommodation, and most of them are in the small category with an average of 23 rooms per unit. Karo Regency has several large hotels, some of which are foreign investment (PMA). About 27 percent of commercial accommodations in the Lake Toba area already use online booking platforms, especially commercial accommodations located in Karo, Simalungun and Samosir.

Tabel 2.6 Jumlah Akomodasi di Sumatera Utara

No.	Kabupaten	Akomodasi Komersial (2019)			Terdaftar di Platform Booking Online (2018-2019)	Proporsi Akomodasi yang Memanfaatkan Booking Online
		Bintang	Non-Bintang	Total		
(1)	(2)	(3)	(4)	(5)	(6)	(7)
1.	Karo	10	90	100	25	25,0%
2.	Simalungun	11	55	66	26	39,4%
3.	Samosir	4	94	98	43	43,9%
4.	Toba Samosir	-	63	63	11	17,5%
5.	Tapanuli Utara	3	24	27	4	14,8%
6.	Humbang Hasundutan	1	9	10	-	-
7.	Dairi	-	21	21	-	-
8.	Pakpak Bharat	-	3	3	-	-
Total		29	359	388	109	28%

(Source : Ripda Danau Toba 2020-2045)

The compound annual growth rate (CAGR) of accommodation and rooms in North Sumatra in the past five years was 8.3 percent and 7.1 percent, respectively. Hotel growth is driven by increased accessibility to Lake Toba, especially land accessibility between Medan - Karo via Berastagi and Medan - Simalungun via Pematang Siantar, as well as the opening of Silangit Airport. Investments in new hotels in Berastagi, Parapat, and Balige include the provision of Meeting, Incentive, Conference and Exhibition (MICE) facilities, as well as the development of contemporary boutique hotels to accommodate the needs of the millennial market.

1.1.5 Amenity

Means of Eating and Drinking

Food and drink facilities spread across 8 districts are dominated by Batak cuisine with limited menu choices. The use of local ingredients has grown in popularity, including the use of local fruits, Batak spices and vegetables from the surrounding plantations. Culinary tourism centers are scattered in popular tourist areas that have been developing for a long time, including KTA Parapat, KTA Simanindo, and Berastagi. Arrangement of restaurants needs to be done in the Lake Toba area, especially those whose locations are not in accordance with their carrying capacity, for example ribbon development for restaurants on the edge of cliffs, on the border and jutting into the water body.

Tabel 2.7 Jumlah Rumah Makan Tahun 2017

No.	Kabupaten	Rumah Makan (unit)
1.	Karo	346
2.	Toba Samosir	148
3.	Tapanuli Utara	23
4.	HumbangHasundutan	32
5.	Samosir	104
6.	Pakpak Bharat	14

Sumber: Karo Dalam Angka (2018); Dinas Pariwisata Tapanuli Utara (2018); Toba Samosir Dalam Angka (2018); Dinas Pariwisata Humbang Hasundutan (2018); Dinas Pariwisata Samosir (2018); Dinas Pariwisata Pakpak Bharat (2018)

Meeting, Incentive, Conference, and Exhibition (MICE)

Means of Eating and Drinking

Food and drink facilities spread across 8 districts are dominated by Batak cuisine with limited menu choices. The use of local ingredients has grown in popularity, including the use of local fruits, Batak spices and vegetables from the surrounding plantations. Culinary tourism centers are scattered in popular tourist areas that have been developing for a long time, including KTA Parapat, KTA Simanindo, and Berastagi. Arrangement of restaurants needs to be done in the Lake Toba area, especially those whose locations are not in accordance with their carrying capacity, for example ribbon development for restaurants on the edge of cliffs, on the border and jutting into the water body.

The presence of MICE on Lake Toba can have multiple effects on the tourism industry through increasing hotel occupancy, culinary services, transportation services, souvenirs and others. MICE can too attracting tourists outside of peak season and encouraging increased length of stay.

The distribution of MICE activities in the Lake Toba area is concentrated in Parapat, Balige, Simanindo, Berastagi, as well as for certain capacities in Pangururan. The government, private companies, and users have used MICE facilities in Parapat, Simanindo, and Berastagi for a long time. The MICE facilities in Parapat, Simanindo and Brastagi also have better service quality in terms of staff readiness, availability of supporting technical equipment, good accessibility, and proximity to DTW, compared to other areas. Balige is a destination with significant MICE growth as shown by the construction of several new hotels that have MICE facilities. Sisingamangaraja XII (Silangit) Airport is also a driving factor for the growth of MICE demand for Balige and its southern regions. On the other hand, Pangururan has several accommodations that provide MICE facilities with a small capacity, with the main customers of the Regional Government, as well as training and seminars targeted at the local population.

Tabel 2.8 Ketersediaan Fasilitas MICE di 8 Kabupaten (2018)

Kabupaten	Kecamatan	Fasilitas MICE
Karo	Merek	Simaleum Resort
	Brastagi	Mikie Holiday Resort, Sinabung Hills Hotel, Rudang Hotel & Resort, Hotel Grand Orri, Berastagi Cottage
Simalungun	Girsang Sipangan Bolon	Inna Parapat, Niagara, Atsari, Siantar Hotel Parapat, Parapat View, Patra Comfort, Sapadia, Balai Harungan Bolon, Danau Toba International Cottage Parapat
Toba Samosir	Ajibata	Star Beach Hotel, Opriss, Aek Jordan
	Balige	Nabasa Hotel, HKBP Convention Hall, Hotel Sumatera, GM Marsaringar, Villa Sapadia, Mess Pemprovsu, Hotel Gelora Tao Toba Beach, Hotel Mareda
	Laguboti	IT DEL Convenson Hall, Sere Nauli, BaritaUli I, BaritaUli II
	Porsea	Hotel Santo Djaya
	Tampahan	Tiara Bunga Hotel Balige, Almonsari Panatapan Resort
Tapanuli Utara	Siborongborong	Noah Hotel Silangit
Samosir	Simanindo	Anju Cottages, Samosir Villa Resort, Lekjon Cottage, Silintong Hotel, Toba Beach, Thyesza, Ambaroba Hotel Resort, Tabo Cottages
	Pangururan	Parbaba Beach Hotel, Saulina Resort
Dairi	Silahisabungan	Debang Resort
	Sidikalang	Mutiara Dairi Hotel, Gedung Bale Karina
TOTAL	47 Fasilitas	

Sumber: Survei Primer dan Sekunder (2018)

Tourism Information Center

In the Lake Toba area, there are four Tourist Information Centers (TIC) and two Geopark Information Centers (GIC), although functionally they are still at the beginner stage. The provision of GICs located in Sigulatti and Parapat is under the supervision of the Toba Caldera Geopark Management Agency and functions to provide information and education for tourists about the Toba Caldera. GIC Sigulatti has limited exhibitions. GIC Parapat provides a quite interesting and complete exhibition.

Tabel 2.9 Pusat Informasi Pariwisata (2018)

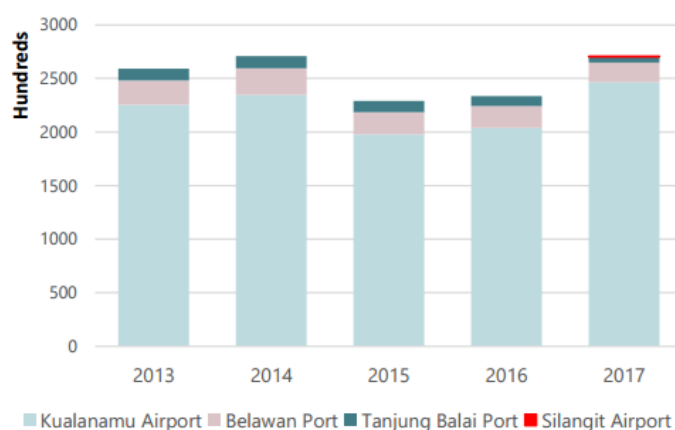
No	Pusat Informasi	Lokasi
1	TIC Parapat	Kecamatan Girsang Sipangan Bolon, Kabupaten Simalungun
2	TIC Tuktuk	Kecamatan Simanindo, Kabupaten Samosir
3	TIC Tele	Kecamatan Hariang, Kabupaten Samosir
4	TIC Silangit Airport	Kecamatan Siborong-borong, Kabupaten Tapanuli Utara
5	GIC Parapat	Kecamatan Girsang Sipangan Bolon, Kabupaten Simalungun
6	GIC Sigulatti	Kecamatan Sianjur Mulamula, Kabupaten Samosir

Sumber: Survei Primer (2018)

2.2 The Demand Side of the Tourism Market

2.2.1 International Tourists

The tourism potential in North Sumatra has not been optimally developed to attract foreign tourists (tourists) so that its growth in recent years has tended to fluctuate in the range of 200 thousand visits in the 2013-2017 period. Total arrivals to North Sumatra through various entrances totaled 270,782 in 2017, or 1.9 percent of the number of foreign tourists visiting Indonesia in the same year. In comparison, the CAGR of foreign tourists nationally in the same period was 12.4 percent.



(Sumber: Ripda Danau Toba 2020-2045)

Most of the foreign tourists visiting North Sumatra come from Malaysia and Singapore. Visits by foreign tourists from Singapore grew quite stable, while foreign tourists visiting from Malaysia experienced a decline. In the 2013-2017 period, foreign tourists from India, the United States and France grew the highest.

Tabel 2.10 Perbandingan Pasar Utama Sumatera Utara dan Indonesia, 2017

Kebangsaan	Kedatangan Internasional			CAGR 2013 – 2017 (%)	
	Sumatera Utara	Indonesia	Proporsi Sumatera Utara (%)	Sumatera Utara	Indonesia
Malaysia	128.761	2.121.888	6,1	-0,17	11,34
Singapura	17.312	1.554.119	1,1	17,61	2,07
China	8.635	2.093.171	0,4	16,75	24,97
Australia	5.184	1.256.927	0,4	15,93	6,31
Jerman	5.050	267.823	1,9	10,18	11,47
Belanda	4.636	212.426	2,1	-1,30	6,86
Amerika Serikat	3.918	344.766	1,1	19,30	9,90
Inggris	3.852	378.131	1,0	16,61	12,41
India	3.652	536.902	0,7	27,66	23,44
Perancis	3.124	274.117	1,1	19,30	7,94

Sumber: BPS, Sumatera Utara dalam Angka (dengan upscaling 10%), 2019; dan Kementerian Pariwisata, 2019

Tourists visiting North Sumatra choose to visit Samosir and Berastagi Islands for the purpose of traveling to enjoy the view of Lake Toba as well as the culinary richness and Batak culture. Statistical data in 8 districts around Lake Toba also shows that most of the tourists visiting Lake Toba in 2017 are concentrated in Samosir and Karo Districts. On the other hand, foreign tourist visits in other districts were quite volatile, with the exception of North Tapanuli, which recorded a positive growth trend.

The estimation results of foreign tourist visits show that foreign tourists from Malaysia (53.1 percent) and ASEAN (60.6 percent) are the main markets for Lake Toba. The Lake Toba market outside ASEAN originates from the European continent (22.8 percent), especially from the Netherlands, Germany and England. There are also quite a lot of foreign tourists from Australia and the United States visiting Lake Toba. The estimation results show that the expansion of the Lake Toba tourism market needs to be directed to new markets in Europe and the Asia Pacific region outside ASEAN. The trend of decreasing tourist arrivals from Malaysia needs to be observed in relation to the frequency of flights and the need for diversification of attractions.

2.2.2 Indonesian Tourists

The number of domestic tourists (wisnus) visiting North Sumatra in 2018 reached 11,586,299 trips, an increase of 8.7 percent compared to 2017. This domestic tourist trip mostly aims to visit friends / family (51.0 percent) and recreation. (39.4 percent). In 2018, the proportion of domestic tourists who traveled to North Sumatra for the purpose of recreation decreased compared to 2017 (40.7 percent). The decline also occurred on the trips of domestic tourists to North Sumatra for the purpose of MICE, pilgrimage / religion, and sports / arts. On the other hand, there is an increase in tourist visits to North Sumatra for business purposes, education and training and medical treatment. Most tourists visiting North Sumatra for recreational purposes choose natural and man-made tourist attractions, followed by marine and cultural tourism attractions.

Millennials Wisnus tend to try water sports on several local beaches, apart from exploring the area and enjoying culinary delights. In 2018, most domestic tourists in North Sumatra used friends / family home accommodation (84.2 percent) and the rest used commercial accommodation (13.6 percent). The number of domestic tourists living in commercial accommodation has decreased compared to 2017 (15.5 percent). This condition is in line with the decline in the proportion of domestic tourists doing recreation, and at the same time shows the challenges of the availability and quality of adequate amenities and accommodation. On 2017-2018 period, most of the domestic tourists used land transportation modes (94-95 percent).

Peak seasons for foreign tourists visiting North Sumatra are Eid al-Fitr, school holidays (June - August), Christmas and end of the year (mid-December to early January), and around Easter¹¹. Wisnus who is visiting Lake Toba for the first time tends to visit the Island

Samosir and popular destinations, such as Siallagan Trial Chair, King Sidabutar's Tomb, and so on, apart from shopping at Tuktuk¹². Crossing to Samosir Island by boat is one of the most popular experiences for tourists. (Source : RIPDA Danau Toba 2020 -2045)

Tabel 2.12 Perkembangan Wisatawan Nusantara ke 8 Kabupaten di Sekitar Danau Toba

No.	Kabupaten	Jumlah Kunjungan berdasarkan DTW					
		2012	2013	2014	2015	2016	2017
1.	Karo	n/a	n/a	n/a	241.803	n/a	552.430
2.	Simalungun	325.046	335.295	348.765	285.824	306.332	n/a
3.	Toba Samosir	116.349	93.493	103.896	102.766	370.898	729.445
4.	Tapanuli Utara	98.094	96.361	91.647	108.117	128.110	145.765
5.	Humbang Hasundutan	3.798	3.994	4.033	30.473	50.667	100.015
6.	Samosir	119.530	124.117	140.637	141.215	154.905	222.288
7.	Dairi	84.344	83.740	103.682	125.503	126.866	260.013
8.	Pakpak Bharat	n/a	n/a	6.300	4.620	4.181	n/a
Total		747.161	737.000	798.960	1.040.321	1.141.959	2.009.956

Sumber: Kabupaten dalam Angka (2013 – 2018), Data Dinas Pariwisata Karo (2017), Data Dinas Pariwisata Humbang Hasundutan (2017), Data Dinas Pariwisata Pakpak Bharat (2014 – 2015), Data Dinas Pariwisata Toba Samosir (2016)

Closing:

The winus calculation takes into account (i) differences in calculations between districts, (ii) Bank Indonesia research, and (iii) the assumption that the proportion of foreign tourists and tourists staying in commercial accommodation is 10%: 90%, which is then compared with data on the number of rooms available (31 Districts) to see the occupancy rate. Wisnus in the Lake Toba area stay at the house of relatives and friends (VFR: visiting friends and relatives) and same day tourists (daily visitors), each using different calculations and assumptions. Wisnus VFR considers the number of family heads and their growth, as well as the ratio to wisnus. Wisnus same day considers the number of residents in nearby cities (especially Medan as the largest market source), the percentage who make daily trips, and the number of trips per year.

Promotional efforts carried out by the government through destination branding programs can include the Tourism Association, academics, media and the public.

REFERENCES:

- Aaker, David.A, (1991), *Managing Brand Equity: Capitalizing on the Value of a Brand Name*. New York: Free Press
- BPS Sumatera Utara dalam Angka,2019
- Dinas Pariwisata Kabupaten Toba Samosir. 2016
- Kartajaya, Hermawan,(2005), *Attracting Tourist Traders Investor: Strategi Memasarkan Daerah di Era Otonomi*, Jakarta: Gramedia Pustaka Utama
- Keller, KL.(2006). *Strategic Brand Management; Building, Measuring, and Managing Brand Equity*.Prentice Hall.New Jersey
- Lescu, D.N. dan Amesquita, R.S(2011), *Branding the controversial: Challenges in destination branding*, *Innovative Marketing*, Vol.7, Issue 2, 2011
- Karo dalam Angka. 2018
- Kabupaten dalam Angka (2013-2018)
- Keputusan menteri Pariwisata Nomor KM.38/UM.001.MP/2017. Logo Branding 10 Destinasi Pariwisata Indonesia
- Morissan.(2007). *Periklanan: Komunikasi pemasaran terpadu*. Jakarta: Ramdina Prakarsa.
- Ripda Danau Toba 2020-2045
- Survei primer dan Sekunder.2018
- Stratego Pemasaran Dalam Negeri Kementerian Pariwisata. 2015
- cnnindonesia.com
- Executive Summary Basic Research STP Bandung 2016
- <https://databoks.katadata.co.id/datapublish/2019/07/17/kunjungan-wisatawan-mancanegara-ke-danau-toba-hanya-naik-tipis>)