Integrated Tourism Master Plan (ITMP)

Lombok Island

2022 -2030

MINISTRY OF PUBLIC WORKS AND HOUSING
REGIONAL INFRASTRUCTURE DEVELOPMENT AGENCY
Integrated Tourism Master Plan (ITMP)
Lombok Island 2022 - 2030

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Assalamu’alaikum Warahmatullahi Wabarakatuh

Praise and gratitude we pray to Allah SWT, because for all His grace and guidance, the preparation of the Integrated Tourism Master Plan (ITMP) Lombok Island can be completed.

The preparation of this book is a form of real contribution from the Regional Infrastructure Development Agency (RIDA) in carrying out the mandated tasks related to the preparation of technical policies and integrated plans for the Public Works and Public Housing (PWPH) infrastructure development program based on regional development. In addition, the Lombok Island RIDP also acts as a follow-up step for the Ministry of PWPH in the aspect of integrated planning towards established national policies such as the National Medium-Term Development Plan (NMTDP) and the Regional Spatial Plan.

The Lombok Island RIDP is one of the PWPH infrastructure development plan documents which is expected to be the main reference and coordination medium for technical organizational units within the PWPH Ministry in carrying out infrastructure development oriented to the development of the Lombok Island region. Furthermore, Lombok Island RIDA will also be able to act as a medium of communication with other Ministries/Institutions related to the infrastructure development process on Lombok Island.

Finally, it is highly hoped that the Lombok Island RIDP can be useful for all stakeholders involved in the process of implementing development on Lombok Island, so as to encourage the acceleration of regional development in West Nusa Tenggara Province, and be able to improve the welfare of the community in general.

Wassalamualaikum Warahmatullahi Wabarakatuh

Jakarta, September 2021

Ir. Rachman Arief Dienaputra, M.Eng
Head of Regional Infrastructure Development Agency
Assalamu’alaikum warrahmatullahi wabarakatuh

While giving thanks to Allah SWT for His blessings and grace, this book of the Integrated Tourism Master Plan (ITMP) Lombok Island can be completed properly.

Lombok Island RIDP is one of the island-based planning documents in West Nusa Tenggara Province. The substance of the main discussion reviewed in this book includes the direction of regional development policies and infrastructure development on the island of Lombok, regional profiles, regional development scenarios and Ministry of Public Works and Housing’s infrastructure development programs.

The analysis was carried out on primary data and information collected through a series of discussions/interviews with key stakeholders, surveys and field observations, as well as mapping and aerial video (drones).

In addition, in order to enrich the analysis, secondary data has also been collected in the form of various types of publications published by each institution. The results of the analysis provide a presentation of the current baseline condition and the direction of Ministry of Public Works and Housing’s (MPWH) infrastructure development for the future period in encouraging regional development on the island of Lombok.

We would like to express our gratitude for the participation and assistance of all parties involved in the process of compiling this book, and hope that all the data and information contained in this book will be able to provide maximum benefits for improving the performance of MPWH infrastructure in West Nusa Tenggara Province, especially Lombok Island. Which in the end will be able to encourage regional development in the islands of Nusa Tenggara and Eastern Indonesia.

Wassalamu’alaikum warrahmatullahi wabarakatuh

Jakarta, September 2021

Ir. Kuswardono, MCP
Head of Center for Public Works Infrastructure Development Region II
Integrated Tourism Master Plan (ITMP)

Lombok Island

2022 - 2030
Lombok Island is one of the 5 Super Priority Tourism Destinations (SPTD) that have been set by the Government of Indonesia in order to encourage tourism as one of the priority sectors, with a tourist target projected in 2045 to reach 12 million visits both domestic and foreign tourists, as well as a projected tourism revenue of IDR 260 trillion in 2045.

The coverage of the Lombok DPSP includes the Gili Senggigi Key Tourism Area (KTA), South Beach KTA, Mataram Potential KTA, and Rinjani Potential KTA. Based on tourism potential, Lombok Island will be developed with a vision of being sustainable, resilient, and inclusive and providing a complete and quality experience.
Lombok has a variety of **thematic tourism potentials** of Nature, Artificial, and Socio-Cultural. In addition, the Mandalika Special Economic Zone (SEZ) also provides its own advantages in supporting tourism rebound through the organization of international World Superbike and Moto GP events. Food Crops Agricultural Commodities also have great potential to be developed to support the development of the tourism sector in Lombok, in accordance with the concept of developing an agriculture belt in the middle lane area of Lombok Island.

It is necessary to take into account the **high natural disaster risk** that exists in Lombok. In addition, the existence of Rinjani National Park also requires sustainable management of environmental carrying capacity. Fulfilling the need for raw water supply in the future also requires a sustainable water supply strategy in Lombok.
1. **Gili Senggigi and its surroundings:** Nature & Culture (6 Priority Tours)
2. **South Beach and its surrounding:** Nature & Culture (22 Priority Tours)
3. **Rinjani and its surroundings:** Nature & Culture (5 Priority Tours)
4. **Mataram City and its surroundings:** Manufacture & Culture (11 Priority Tours)

Total domestic tourist visits 2018: **1.3 million**
Total foreign tourist visits 2018: **980 thousand**

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2. **National Priority Super Priority Tourism Destinations:** NPSPTD Lombok

1. SPTD Mandalika – SEZ Mandalika is included in **10 Priority DPSPs** and entered into **5 DPSPs**.
2. Estimated Investment around: **USD 3 Billion**
3. KEK Mandalika will conduct MotoGP and Superbike International Events which are expected to boost Lombok tourism rebound.

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3. **Main Commodity Development Potential to support tourism:** Food Crops Agriculture

1. In the 2010-2019 period, the Agriculture, Forestry and Fisheries Sector became the highest sector (22%).
2. Food crops dominate the agriculture, livestock, hunting, and agricultural services sectors over the last 5 years in NTB.
3. The largest commodity in Lombok is rice (719,083 tons). Regency of East and Central Lombok are the biggest producers.
4. Potential development of agriculture belt in the middle lane of Lombok Island.
Water Needs and Availability in 2020 is still a surplus of around 0.5 m$^3$/second

Requirement : 7.0729 m$^3$/second
Availability : 7.57962 m$^3$/sec
Balance : 0.5067 m$^3$/sec

1. Mount Rinjani as the main water source in Lombok
2. Mount Rinjani is directed as a conservation area by minimizing exploration
3. Located in 4 districts, North, East, West and Central Lombok

Disaster High Risk
1. Earthquake North Lombok
2. Volcano\ Landslide, Mount Rinjani
3. Floods, East Lombok Mataram
4. Drought, Central Lombok, Lombok

Scarcity of Raw Water Supply
Water Needs and Availability in 2020 is still a surplus of around 0.5 m$^3$/second

- Requirement : 7.0729 m$^3$/second
- Availability : 7.57962 m$^3$/sec
- Balance : 0.5067 m$^3$/sec
Tourist Projection

Compound Annual Growth Rate (CAGR) of domestic tourists visiting for 25 years is around 6.1%. The highest CAGR for domestic tourists is projected to occur in the 2nd period (2024-2029) with an assumption of 10.9% growth.

The CAGR of foreign tourist visits for 25 years is estimated at around 6.0%. The origin of foreign tourists visiting Lombok Island is projected to remain dominated by foreign tourists from Europe. This is in line with the trend where foreign tourists from Europe account for 4-10% of foreign tourists visiting Lombok Island. Meanwhile, foreign tourist visits from Australia and Southeast Asia are projected to increase significantly in line with the increasing variety of activities and tourist attractions on the island of Lombok.
Growth projections are prepared taking into account:
- Supporting capacity of Lombok Island
- The readiness of the tourism situation on the island of Lombok to facilitate tourism growth and manage it sustainably
Population Growth

The population concentration in 2045 is mostly still in East Lombok Regency (27.5 percent), however it has spread to other areas compared to the population distribution in 2017 and 2018. The population in North Lombok, Mataram City and West Lombok Regency is projected to increase by approximately doubled or more over a 25-year period, in line with increased economic activity, including tourism, in both regions.

Growth Projections

At ITMP Best case, Projections include labor migration in new developments in Lombok, namely in Mandalika and Bandar Kayangan.
Integrated Tourism Master Plan (ITMP) also uses data from the 2015 Inter-Census Population Survey (SUPAS) to calculate population projections in the tourism development scenario in Lombok. The calculation results show that the population on the island of Lombok until 2045 will reach 5.3 million people.
Tourism Revenue Projection

The increase in domestic tourists and foreign tourists’ visits is expected to increase income from tourism. With the average ALOS for domestic tourists assumed to be a maximum of 4 days, with daily expenses continuing to increase, the income from domestic tourists is estimated to reach Rp 98.6 trillion in 2045. This projection shows an increase in the daily expenditure of foreign tourists from Rp 1,600,000 in 2018 to Rp 3,921,730 in 2045 with a CAGR of increasing the income of foreign tourists for 25 years is around 3.4 percent.

Growth Projections
Using the same maximum average ALOS as domestic tourists, but with a slower rate of increase in daily expenditures than domestic tourists, foreign tourists visiting in 2045 is estimated to generate Rp 164.2 trillion. The average daily expenditure of foreign tourists is estimated to increase from USD 123.3 in 2018 to USD 478.6 in 2045. The increase in foreign exchange from foreign tourists is estimated to grow (CAGR) by 5.2 per year for 25 years.
Regional Scheme

Lombok Island has great potential in forming the Bali – Lombok – Labuan Bajo national tourism network system. The island of Bali which is included in the international tourism area will provide a magnet for the development of tourism potential, especially for the islands of Lombok and Labuan Bajo which are included in the Super Priority Tourism Destinations.
Development Scenario

VISION:
Sustainable, resilient. And inclusive and provide a complete and sustainable experience.

The Lombok Island development scenario is directed to facilitate tourism corridors, especially in the southern and western parts of Lombok Island. Tourism development is focused on four Key Tourism Area (KTA) clusters in Gili-Senggigi, South Beach, Mataram and Rinjani.
During the 2009-2017 periods, Lombok recorded a total realized investment of Rp 18.6 trillion, of which 28 percent (Rp 5.3 trillion) was Domestic Investment (PMDN). The realization value of Domestic Investment in 2017 was the highest. Meanwhile, the largest realization of Foreign Investment (PMA) was recorded in 2015. Tourism is the sector that brings in the largest PMA and the second largest PMDN in the Province of NTB.

The investment, marketing and branding program on the island of Lombok is expected to be a gateway and stimulus in the development of Lombok tourism as a whole. The role of investors is expected to be a solution to the limited funding in the tourism sector. Some of the proposed major projects are:

Program Investment
- Lombok Investment Ready Program
- Tourism Investment Formulation
- Tourism investment roadshow

Marketing and Branding
- Production of environmental and tourism promotion
- Host international events
- Overseas advertising
- Involving influencers in tourism marketing activities
Basic Infrastructure Program

Basic infrastructure is one aspect that needs to be improved, especially to meet the basic needs of the Lombok people and in order to support the tourism sector. One of them is related to clean water which is needed to provide clean water supply for tourist areas and tourism supporting areas such as hotels and restaurants. Some of the proposed major projects are:

**Clean Water**
- Capacity addition and optimization of the Tibu Lempanas SPAM, Aik Berik Village
- Construction of new SPAM Dodokan Hilir

**Drainage**
- Watershed repair and maintenance
- Provision of coastal forest

**Garbage**
- Revitalization of the Moth Final Disposal Site
- Pujut Recycling Center Development
- Development of Waste to Energy Gerung
Road and Transportation Program

One of the important aspects in tourism development is the entry gate for tourists to and from Lombok Island and access on Lombok Island which connects land-air and sea transportation. Some of the proposed major projects are:

**Airport**
- BIL Infrastructure Improvements
- Expansion of Cargo Terminal 1

**Harbor**
- Terminal Infrastructure Improvements
- Parking Area Infrastructure Improvement
- Terminal 1 expansion
- Feasibility Study of Tembowong Port Development

**Road and Bridge**
- Construction of BIL bypass – Mandalika
- Feasibility Study of Sheet Section – Mataram – Kayangan
- Widening of the Kuta-Kruak road
- Addition of Lane Kediri – Praya