

Shift-Share Analysis of Tourism Industry Growth in Kulon Progo Yogyakarta

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ABSTRACT

The purpose of this paper is to examine relevant practices, potentials, and opportunities of tourism industry at Kulon Progo District. Tourism is expected to be a supporter of sustainable economic growth so that various regions will compete to develop local destination and maintain local wisdom. The number of foreign and domestic tourist arrivals to Yogyakarta Province in 2012-2016 were used as the basis for assessing tourism potential. Shift-share was used to analyze the potentiality of tourism sector in Kulon Progo compared with tourism in Yogyakarta, Sleman, Bantul, and Gunung Kidul. Results showed that the tourism sector contributed to the Kulon Progo economy with indicators from actual growth, region mix effect, and competitive effect yield positive value. Regularly local government established the regulation for improving the tourism in Kulon Progo. It is concluded that Kulon Progo tourism sector is capable of being a propulsive and potential industry in future. In order to upgrade the advantage and specialized the destination, it is indispensable for Kulon Progo to take proper marketing strategies, to encourage local creativities, to cooperate and integrate with other regions. Therefore, stakeholders can use the information as the basis for making decisions related to tourism in Kulon Progo.

Keywords: Shift Share, Propulsive Industry, Tourism, Kulon Progo

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1. INTRODUCTION

The tourism industry is attractive to be empowered because it contributes to economic and employment growth. World Tourism Organization (2017) reported that the number of international tourist arrivals in 2016 has increased 3.9% from previous year, even above the average post-crisis global economic growth rate in 2009. Approximately, 53% of tourist' objectives are leisure, recreation, and holiday so expenditures such as accommodation, food and drink, entertainment, shopping and other goods or services are economic opportunities for the destination. As much as 55% foreign tourists are using air transport, so areas with access to an airport have a great opportunity in this industry. In developing countries, tour-

ism acts as a major component of service-driven economic (Yasin *et al.*, 2011) so that creativity and innovation become an attraction for tourists. Thus, tourism development has a positive impact on the regional economy as well as to grow business opportunities for entrepreneurship sector and SMEs.

Related to the development of tourism, Kulon Progo as one of the districts in Yogyakarta Special Region Province has a great expectation in the tourism industry. By relying on the availability of natural resources and local wisdom, the local government together with local communities build and manage local tourist destinations. Geographically, Kulon Progo is located at the west of Yogyakarta so that some of its territories is adjacent to Magelang district in Central Java Province which is

widely known for its Borobudur destination. To the east, Kulon Progo is bordered by Bantul and Sleman district which have the closest access to tourism activities in Yogyakarta. Those districts, namely Bantul, and Sleman, are easy to receive tourists overflow and capture the opportunities of the creative economy industry. The existence of Yogyakarta as the City of Culture and Education causes the existence of Kulon Progo as less attractive tourist destinations. Based on these conditions, Kulon Progo has started to foster local creativity to develop ecotourism for the last 8 years. Although simple, the seriousness of Kulon Progo local government can be seen in form of provision of facilities, infrastructures, training, and promotion to support the ecotourism.

Topographically, the height of Kulon Progo region varies so much that it affects the tourism potential and natural wealth. The northern part of Kulon Progo is Menoreh Hills and in the south facing the Indian Ocean so that in the past agricultural sector made an important contribution to Kulon Progo. The development of information technology has motivated some local communities to pioneer Menoreh ecotourism. In the future, the opening of international access through New Yogyakarta International Airport will encourage the tourism industry. Innovation and regional asset development strategy are done through the cooperation of local, national, and foreign investors, so it is expected that there will be a shift in the pattern of the economy from agriculture to services, one of which is tourism. By promoting the principles of sustainable development, local government regulation acts as a counterweight between local economic, socio-cultural, and environmental interests. The progress of the tourism sector can remain synergistic with the agricultural sector which has been the backbone of the Kulon Progo community economy, such as the Subak system on agrotourism in Bali. Kulon Progo can integrate the aspects of triple bottom line as a sustainable competitive advantage in future.

In line with the Development Plan of 2012-2032 (Pemerintah Kabupaten Kulon Progo, 2012), the commitment for sustainable development is implied in Kulon Progo district development planning. The development of the tourism sector can be directed to encourage local brands so that local potential and wisdom can be empowered simultaneously. Tourism optimization is not just about pursuing economic targets but also contributing to the preservation of local wisdom as well as the future of ecology in Kulon Progo. Local commodities such as brown sugar, tea, coffee, chocolate, batik, and socio-cultural life are the supporting assets of tourism. Along with the increasing needs of the community for tourism services, supported by the synergy of natural resources potential and regulation of local government, this sector is expected to grow rapidly in the future.

For those reasons, it is necessary to analyze how far

the tourism sector is capable of being a propulsive industry in Kulon Progo. The shift-share approach will analyze the contribution of the tourism sector to regional economic growth such as the study of Akita (2002, 2003), Petrakos *et al.* (2011), Sjafrizal (2014) or as a technique for assessing tourism competitiveness (Sirakaya *et al.*, 2002; Yasin *et al.*, 2011). Based on prior studies, components of shift share consist of national share, proportional shift (industrial mix), and differential shift (locational component). Shift-share will identify whether the tourism sector can serve as the parent industry to improve community welfare in Kulon Progo. By mechanism, the increase in the number of tourists will have a positive impact on the regional economy and contribute to the welfare of the community. The number of foreign and domestic tourist arrivals to Kulon Progo will be compared with the other four regions in Yogyakarta Special Region namely Sleman, Bantul, Yogyakarta, and Gunung Kidul.

The purpose of this study is to understand the use of shift-share analysis to assess the tourism potentiality in Kulon Progo. Furthermore, the results of the analysis can be used as information for regulators and review materials for academics or NGOs related to the development of Kulon Progo tourism. Finally, the results of the analysis can also be used as an overview for SMEs and entrepreneurs to take opportunities in Kulon Progo tourism.

2. LITERATURE REVIEWS

2.1 The Role of Tourism Industry

Related to tourism, World Tourism Organization (2017) reported the number of international tourist arrivals in 2016 reached 1,235 million, an increase of 46 million from the previous year. The increase in international tourists reached 3.9% in 2015 or exceeded the average post-crisis global economic growth in 2009. The UNWTO estimates a 3.8% increase from 2010 to 2020, thus indicating an opportunity in the world tourism industry sector. Specifically, the tourism sector is a key sector for economic development and job creation around the world. World Travel and Tourism Council (2017) reported in 2016, the sector directly contributed US\$2.3 trillion and 109 million jobs worldwide. Therefore, contributed US\$7.6 trillion to the global economy and supported 292 million jobs. In Indonesia, the direct contribution of the tourism sector to GDP in 2016 is IDR 226,411,000. This contribution is expected to grow by 5.6% annually to IDR 405,975,000 by 2027. This sector directly supports 1,944,000 jobs in 2016 and will increase to 2,517,000 jobs over the next ten years. This information illustrates the benefits of the development of the tourism sector that can be used to prosper the community.

Based on World Tourism Organization (2017) reported that international travel demand follows a positive trend, although several destinations are constrained by security incidents. To improve travel demand, several efforts have been done to improve networking, access to air transportation, and facilitate visa procedures. World Tourism Organization (2017) details the tourists' objectives: (1) 53% to leisure, recreation and holiday, (2) 27% to visit friend recreation, health, religion, (3) 13% for business and professional, and (4) 7% not specified. The preferred mode of transportation is 55% air, 39% road, 2% rail, and 4% water. Meanwhile, World Travel & Tourism Council (2017) identified that in 2016, 76.8% of all travel spend was as a result of leisure travel, compared to 23.2% from business travel. Along with the opening of international access, the development of tourism sector in Kulon Progo will be more competitive so that natural wealth and local wisdom can be a force to capture the opportunities of world tourism industry.

Generally, community assesses the development of tourism has only an economic orientation, while the impact of tourism is not just limited to that aspect. Kreag (2001) categorizes seven impacts of tourism development, namely economic, environmental, social and culture, crowding and congestion, services, taxes, and community attitude. Specifically, the categories are divided into three interest groups: economic, social culture, and environmental. Each category has a positive and negative effect on people's lives so that stakeholders should predict and measure the impact on the sustainability of tourist destinations and community welfare. The interests of each group need to be synchronized to support the realization of sustainable development in tourism sector.

2.2 Sustainable Development

According to Organization for Economic Co-operation Development (OECD), sustainable development is defined as "development that meets the need of the present without compromising the ability of future generations to meet their own needs" (Strange and Bayley, 2008). Prior to that, Elkington cited by Taylor and Walley (2003) sparked the idea of triple bottom line encompassing three aspects of development that are economic, environmental, and social/ethical as pillars of sustainable development. Implementation of the principle creates a balance between profit, people, and planet to achieve sustainable prosperity. The principle of sustainability in tourism development is not limited to maintain local wisdom but in harmony with green economic (Ministry of Tourism and Creative Economy of the Republic Indonesia in cooperation with the International Labour Organization, 2012) and green tourism (Patti, 2017). Generally, implementation of sustainable development will improve welfare, social justice, and maintain the scarcity of natural resources. The usage of

natural resources and energy sources must balance the availability and preservation of natural resources. Therefore, the goals of sustainable development can be realized effectively through the development of destination.

The idea of sustainable development began in 2000 by raising the idea of accelerated human development and poverty reduction commitment. Millennium Development Goal's (MDGs) declared eight goals, namely: (1) Eradicating extreme poverty and hunger, (2) Achieve basic education for all, (3) Encourage gender equality and empower women, (4) Reduce child mortality, (5) Improve maternal health, (6) Fighting HIV and AIDS, malaria and other diseases, (7) Ensure environmental sustainability, (8) Develop a global partnership for development. After the MDGs end in 2015, continued by Sustainable Development Goals (SDGs) with achievement targets in 2030. SDGs has 17 targets: (1) Eliminating poverty, (2) Preventing hunger, (3) Health and wellbeing, (4) Good education quality, (5) Gender equality, (6) Clean water and sanitation, (7) Access to affordable energy, (8) Economic growth, (9) Innovation and infrastructure, (10) Reducing inequality, (11) Sustainable development, (12) Consumption and sustainable production, (13) Preventing climate change impacts, (14) Maintaining marine resources, (15) Maintaining terrestrial ecosystems, (16) Peace and justice, and (17) Revitalizing global partnerships (Hoelman *et al.*, 2015). The process of achieving targets requires the support of sustainability principles implementation in each development program. In line with programs, the management of the tourism industry contributes positively to poverty reduction, rural development, preservation of culture and society, gender equity, environmental protection, climate change mitigation and exhibits a beneficial impact on climate change mitigation economic (Ministry of Tourism and Creative Economy of the Republic Indonesia in cooperation with the International Labour Organization, 2012) so, further development of tourism destinations improvise to be sustainable tourism.

2.3 Linkage of Tourism Sector with Sustainable Development

The regulation of the development of tourism sector in Indonesia is governed by Tourism Act Number 10 Year 2009 (Pemerintah Republik Indonesia, 2009). Referring to Article 1 of the act, the definition of Tour and Tourism are defined as follows: "Tour is a travel activity undertaken by a person or group of people by visiting a particular place for recreational purposes, personal development, or studying the unique attractions of the visited for a temporary period." Then, the definition of tourism is a variety of tour activities and supported by various facilities and services provided by the community, businessmen, the government and local government." Facilities are needed to support visitor activity, so that the needs that arise become business

opportunities for SMEs and entrepreneurship. Tourists need facilities to enjoy leisure, recreation, and holiday. Expenditure from tourists for these facilities is an economic opportunity for tourist destinations. Referring to Tomić and Božić (2015) identified that destination attractiveness as one of the determinants of tourist destination choice. Thus, cultural heritage is a potential for tourist destinations. The longer the tourist stay, the greater the opportunity to get income for tourism businesses. For this reason, creative efforts and regulations are needed to extend the stay through unique cultures, traditions, natural wealth, and other unique potentials.

Article 4 of Tourism Act No. 10 of 2009 contains 10 objectives of tourism development programs in Indonesia. Of these objectives, there are four objectives that are inherent to the sustainable development, namely: (1) Increasing economic growth, (2) People's welfare, (3) Preserving nature, environment and resources, (4) Promoting culture. Based on regulations, the determination of the policy objectives of the tourism industry in Indonesia is in line with the triple bottom line. Therefore, in order to maintain sustainability, an integration among economic, social culture and ecological aspects is needed. This sector has potential to be empowered as sustainable tourism development as a model initiated by WTO. The uniqueness of local culture and Indonesia's natural wealth is very appropriate to be developed based on sustainability.

In addition to above considerations, the implementation of sustainable tourism is relevance to the achievement of MDGs or the creation of green jobs from tourism (Ministry of Tourism and Creative Economy of the Republic Indonesia in cooperation with the International Labour Organization, 2012). Therefore, it is necessary to introduce and direct the principle of sustainability to conventional tourism managers (Kleszczynski, 2016). Implementation of sustainable tourism development is also consistent with the target of SDGs, including economic growth, safeguarding marine resources, and terrestrial ecosystems (Hoelman *et al.*, 2015). Sustainable tourism development has widely effect to the welfare of community. Therefore, the local government need to apprehend two important consequences. Generally, the development of tourism sector has trigger to potential risk of environment. It could become a threat to sustainability of natural resource and culture environment. Inversely, the impact of nature environment condition to the tourist risk.

Relevant to sustainable development, prior articles illustrate the potential of implementing sustainable tourism development for the management of natural tourism in Indonesia, including: Kelimutu National Park (Djou *et al.*, 2016), Gunung Leuser National Park (Patana, 2012), habitat of Papua Bird (Pangau-Adam, 2012), Marine Biodiversity (Samiaji, 2012), or rural tourism development in Banyuwangi (Indarti and Munir, 2016). The beauty of nature and the uniqueness of socio-cultural life are assets

for the tourism industry so that to maintain the sustainability of the destination must be balanced with conservation regulations. In line with sustainable tourism, improvised development of destinations is realized through natural tourism. In line with Page and Dowling cited by Djou *et al.* (2016), natural tourism has a positive impact on three aspects: preservation and sustainability of nature, active participation, and environmental education. For this reason, destination development must balance biodiversity conservation with development programs (Ross and Wall, 1999). The uniqueness of local culture and the naturalness of natural potential is an attraction for ecotourism, such as: wild life (Bhargava, 2012), mangrove ecosystem (Heronasia *et al.*, 2012), forest (Chetha, 2012), ethnic minority (Sang, 2012) or life in the Himalayas (Barua, 2012). For this reason, it is relevant to the WTO policy, the tourism sector development strategy must synchronize the possible natural risks to tourist safety and the risks of tourism development on environmental sustainability.

2.4 Usage of Shift-Share Analysis

Shift-share analysis is used to determine the effect of improving people's welfare or economic change of a region due to internal and external factors (Sjafrizal, 2014; Petrakos *et al.*, 2011). The use of current shift-share analysis in addition to regional economic analysis (He, 2012), is also used to assess export competitiveness (Wilson, 2000; Wilson *et al.*, 2005), analysis of export competition among members of the economic region (Herschede, 1991), analysis of tourism industry competition (Sirakaya *et al.*, 2002; Sirakaya *et al.*, 1995; Alavi and Yasin, 2000; Yasin *et al.*, 2011; Walmsley, 2003), and growth of international trade (Ahmadi-Esfahani, 1995; Ongsritrakul and Hubbard, 1996).

The shift-share analysis is based on locational shifts previously invented by Creamer (1943) in manufacturing (Lasuen, 1971; Yasin *et al.*, 2011). This technique is a tool that classifies area growth in several economic variables (such as income, output, employment, etc. into various components in certain areas (states, territories and cities) into various components (Mondal, 2009; Dinc and Haynes, 1999, 2005; Yasin *et al.*, 2011) The main benefit of shift-share analysis is simple and does not require primary data collection (Yasin *et al.*, 2011). In addition to the benefits, this technique has limitations because the nature of analysis tends to be temporal, leading to relatively weak theoretical and predictive capabilities (Houston, 1967; Stillwell, 1970; Hellman, 1976; Richardson, 1978; Stevens and Moore, 1980; Knudsen, 2000). To compensate for the results of shift-share analysis, it is necessary to develop a more accurate approach in analyzing the competitiveness of tourism industry, such as using the SWOT analysis for evaluating the developing strategy in tourism sector (Sayyed *et al.*, 2013; Ganjali *et al.*, 2014; Ghorbani *et al.*, 2015).

3. RESEARCH METHODS

3.1 Population and Sample

Population and sample come from five regions in Yogyakarta Special Region Province. The regions are the city of Yogyakarta, Sleman, Bantul, Kulon Progo and Gunung Kidul. The analysis was focused on the number of foreign and domestic tourist arrivals for the period between 2012 and 2016 with the source of BPS DIY 2017 (BPS Kabupaten Kulon Progo, 2016, 2017).

3.2 Data Analysis Method

Data technical analysis uses shift share to measure tourist growth rate from one area to another and to know the impact of tourist visits to the regional economy. This approach was used by Sirakaya *et al.* (2002), Sirakaya *et al.* (1995), Alavi and Yasin (2000), Yasin *et al.* (2011), Walmsley (2003), Yu *et al.* (2010), Shi and Yang (2008), Shi *et al.* (2007), Chiang (2012). Formulation of shift-share approach is as follows:

$$T_{ij}^1 - T_{ij}^0 = T_{ij}^0 (G_{AREA}) + T_{ij}^0 (G_{i,AREA} - G_{AREA}) + T_{ij}^* (G_{ij} - G_{i,AREA}) + (T_{ij}^0 - T_{ij}^*) (G_{ij} - G_{i,AREA}) \quad (1)$$

$$G_{AREA} = \frac{T_{AREA}^1 - T_{AREA}^0}{T_{AREA}^0} \quad (2)$$

Information:

T_{ij}^1 : Number of tourist arrivals from region i to area j at the end of a period.

T_{ij}^0 : Number of tourist arrivals from region i to area j at the beginning of a period.

G_{AREA} : Tourist growth rate from the beginning of the period to the end period.

$$G_{i,AREA} = \frac{T_{i,AREA}^1 - T_{i,AREA}^0}{T_{i,AREA}^0} \quad (3)$$

Information:

T_{AREA}^0 : Number of tourist arrivals at the beginning of a period.

T_{AREA}^1 : Number of tourist arrivals at the end of a period.

$G_{i,AREA}$: Tourist arrivals growth rate from region i to all destinations from the beginning to the end period.

$$T_{ij}^* = T_j^0 \frac{T_{i,AREA}^0}{T_{AREA}^0} \quad (4)$$

Information:

$T_{i,AREA}^0$: Number of tourists from region i to all destinations at the beginning of the period.

$T_{i,AREA}^1$: Number of tourists from region i to all destinations at the end of the period.

T_{ij}^* : Representation of the number of tourists coming to area j of region i if the structure and pattern of tourists in the region i equals all regions.

$$G_{ij} = \frac{T_{ij}^1 - T_{ij}^0}{T_{ij}^0} \quad (5)$$

Information:

T_j^0 : Number of tourists coming to area j at the beginning of the period.

T_j^1 : Number of tourists coming to area j at the end of the period.

G_{ij} : Growth of tourist arrivals from region i to area j.

Based on the above formulation, the influence of tourist visits to a region is divided into 4 parts: Area Wide Effect, Region Mix Effect, Competitive Effect, and Allocation Effect.

First: Area Wide Effect [$T_{ij}^0 (G_{AREA})$] measures changes in tourist arrivals for a region compared to the total number of arrivals. Based on the statement there are several possibilities, namely:

1. If the value is equal to the actual growth, then the area can maintain its market share of tourism. The impact of the other components will be zero.
2. If the value is greater than the actual growth, then the area has a smaller tourist potential compared with the expected market share of tourism. This needs to consider other components.
3. If the value is less than the actual growth, then the area has the potential of tourists greater than the expected market share of tourism. The other components need to be taken into consideration to find out why these conditions can occur.

Second: Region Mix Effect [$T_{ij}^0 (G_{i,AREA} - G_{AREA})$] measures the difference in tourism growth from region i over other regions as a whole. If the tourism growth value from region i is larger, it means tourism in the area is able to grow more rapidly than the average growth of tourism. Thus, the tourism sector can make as an attraction to develop the economy or vice versa.

Third: Competitive Effect [$T_{ij}^* (G_{ij} - G_{i,AREA})$] measures the growth differential of regional tourism j with region i and overall. If the value is positive it means that region j is able to attract more tourists than region i and vice versa. The condition can be interpreted that area j is more competitive for tourism sector than region i or another area.

Fourth: The Allocation Effect ($G_{ij} - G_{i,AREA}$) measures the growth of tourism in an area associated with the Region Mix Effect and Competitive Effect. This effect indicates whether an area has a competitive advantage or vice versa. In addition, to know whether an area can specialize in the development of the regional economy through the tourism sector or vice versa. Yasin *et al.* (2011) mapped four possible areas in the Allocation Effect Possibility (Table 1).

Table 1. Allocation effect possibility

		Competitive Advantage	
		Advantage (+)	Disadvantage (-)
Specialization	Not Specialized (Negative)	$(G_{ij}-G_{i,AREA}) > 0$	$(G_{ij}-G_{i,AREA}) < 0$
		$(T_{ij}^0-T_{ij}^*) < 0$	$(T_{ij}^0-T_{ij}^*) < 0$
		A, N	D, N
	Specialized (Positive)	(Negative)	(Positive)
		$(G_{ij}-G_{i,AREA}) > 0$	$(G_{ij}-G_{i,AREA}) < 0$
		$(T_{ij}^0-T_{ij}^*) > 0$	$(T_{ij}^0-T_{ij}^*) > 0$
	A, S	D, S	
	(Positive)	(Negative)	

Source: Yasin *et al.* (2011).

Information: A = Advantage, N = Not Specialized, D = Disadvantage, S = Specialized.

4. RESULT AND DISCUSSION

4.1 Result

Tourism development of Kulon Progo district is indicated by the number of tourist visits to the area compared to the number of visits to other regions in Yogyakarta Special Province (Table 2). Statistically, the average growth of Kulon Progo tourism occupied the second position (22.73%) after Gunung Kidul (28.43%). This growth is contributed by foreign tourists by 74.29% and domestic tourists by 22.62% per year.

Table 2. Tourists by district/city

District/City	Origin (Person)		Total
	Year	Foreign	
Yogyakarta			
2012		233,841	3,849,764
2016		249,481	5,271,471
Growth (%)		1.63	8.17
			7.83
Sleman			
2012		262,916	2,779,316
2016		246,136	5,696,332
Growth (%)		-1.64	19.65
			18.22
Bantul			
2012		550	2,378,209
2016		5,540	5,143,093
Growth (%)		78.15	21.27
			21.29
Kulon Progo			
2012		705	595,824
2016		6,506	1,346,894
Growth (%)		74.29	22.62
			22.73
Gunung Kidul			
2012		2,053	1,277,012
2016		3,882	3,476,008
Growth (%)		17.26	28.45
			28.43

Source: Processed from several publications of Book of tourism statistics of Yogyakarta Special Region.

Compared to other districts, there is an interesting development in the tourism sector Kulon Progo district. There has been a significant increase in foreign tourist arrivals from 705 people to 6,506 people with a growth rate of 74.29% per year. This figure is higher than the growth of foreign tourists in Gunung Kidul Regency which is 17.26% per year. However, the growth of foreign tourist arrivals in Kulon Progo is lower than that of Bantul. The average growth of tourists in Bantul reaches 78.15% per year with an increase in the number of tourists from 550 people to 5,540 people. Nevertheless, Kulon Progo is still an attractive tourist destination for foreign and domestic tourists compared to other areas in Yogyakarta Special Province. Over the past few years, tourists have continued to arrive to visit nature tours or attend cultural performances in Kulon Progo. Kulon Progo tourism promotion is done creatively through cultural events at regional, provincial, cultural performances in Taman Mini Indonesia Indah (Beautiful Indonesia in Miniature Park), education through songs, achievements, and talk shows on television. Based on above description, it is necessary to analyze the potential of the tourism destination development in Kulon Progo. This potential assessment is used as information for designing tourism sector regulations. Below is the data of tourist visit which is analyzed using shift-share (Table 3).

In general, the arrival of foreign and domestic tourists provide benefits for the tourism sector in Yogyakarta Special Region. The results are evidenced by the positive growth of tourist visits. This can be interpreted that the tourist attraction in the city of Yogyakarta is a competitive tourist attraction and can attract tourists to visit the cultural city but cannot be interpreted as something special for Yogyakarta.

Tourism sector performance in Kulon Progo district is identified from Actual Growth, Wide Effect Area, Mix Effect Region, Competitive Effect, and Allocation Effect. First, Actual Growth shows positive growth from the visits of both groups of tourists with the number of 5,801

Table 3. Shift-Share analysis in district/city of Yogyakarta special region province

	Tourist		Actual Growth	Area Wide Effect	Region Mix Effect	Competitive Effect	Allocation Effect	Conclusion
	From	To						
Foreign		Yogyakarta	15,640	206,820	-124,512	-51,158	-15,509	D, S
		Sleman	-16,780	232,535	18,110	-135,973	-131,451	D, S
		Bantul	4,990	486	154	826,630	-822,280	A, N
		Kulon Progo	5,801	624	271	182,428	-177,521	A, N
		Gunung Kidul	1,829	1,816	1,717	-46,636	44,933	D, N
		Total	11,480	442,280	-104,261	775,290	-1,101,829	A, N
Domestic		Yogyakarta	1,421,707	3,404,905	-2,049,865	67,609	-942	A, N
		Sleman	2,917,016	2,458,152	191,439	279,859	-12,435	A, N
		Bantul	2,764,884	2,103,395	665,838	-4,159	-190	D, S
		Kulon Progo	751,070	526,974	191,439	-4,696	-210	D, S
		Gunung Kidul	2,198,996	1,129,447	229,003	1,631	72	A, S
		Total	10,053,673	9,622,873	-772,145	340,244	-13,705	A, N

Source: Processed by authors.

Legend: A = Advantage, N = Not Spesialized, D = Disadvantage, S = Spesialized.

people and 751,070 people. Secondly, the Area Wide Effect value (624 foreign tourists) which is smaller than the Actual Growth value (526.974 domestic tourists) shows that Kulon Progo tourism has appeal for tourists. This indicates that tourist arrivals to Kulon Progo in 2012 and 2016 are greater than expected. This development is a potency for Kulon Progo tourism sector. Third, Kulon Progo is more competitive attracting foreign tourists compared to three other areas such as the city of Yogyakarta, Sleman, and Gunung Kidul. This is evidenced by the value of Competitive Effects of foreign tourists in Kulon Progo as many as 182,428 people, although the value is lower than the Competitive Effect in Bantul Regency which reached 826,630 people. Different conditions occur with the arrival of domestic tourists. Kulon Progo considered less competitive to attract domestic tourists compared with the city of Yogyakarta, Sleman and Gunung Kidul. This fact is evidenced by the negative value of Competitive Effects of domestic tourists, although the figure is slightly better than the Bantul district.

Fourthly, Kulon Progo has considerable tourism potential in the future as evidenced by the positive value of

Region Mix Effect. The value indicates that Kulon Progo has a growth in tourist visits larger than the average growth. This condition has implications for increasing local revenue as well as the development of tourism development activities and other sectors. The results of shift-share analysis provide a picture of the potential or competitiveness of Kulon Progo tourism sector and possible follow-up in regulation design.

Kulon Progo is considered not yet able to compete with the city of Yogyakarta, Sleman, and Gunung Kidul, but still is something special for tourists. In this observation, the growth of the number of domestic tourists to Kulon Progo is dominated by 6 tourist destinations from 14 tourist objects, namely: Sermo Reservoir, Glagah Beach, Trisik Beach, Congot Beach, Kiskendo Cave, and Suroloyo Peak (Dinas Pariwisata Daerah Istimewa Yogyakarta, 2015, 2016). Table 4 illustrates tourism potential for domestic tourists. Besides Trisik Beach, five other tourist attractions have increased the number of tourists visiting the archipelago with a range from 3% to 49% per year. A significant increase in occurred in Sermo Reservoir with an average increase of 48.86% per year,

Table 4. Domestic tourist visit to kulon progo at year 2012 and 2016 (person)

Tourist Attraction	2012	2016	Growth (%)
Sermo Reservoir	20,822	102,238	48.86
Glagah Beach	278,519	314,036	3.05
Trisik Beach	23,076	11,074	-16.77
Congot Beach	37,544	57,605	11.30
Kiskendo Cave	8,956	14,771	13.32
Suroloyo Peak	10,954	24,513	22.31

Source: Processed from several publications of Book of tourism statistics of Yogyakarta Special Region.

followed by Suroloyo of 22.31%, furthermore by Kiskendo Cave and Congot Beach with a growth rate above 10% and Glagah Beach with the lowest growth rate.

Sermo tourism is managed by Kulon Progo Tourism Service while for developing the areas joins partnership with local tourism community. The community plays a role in developing Sermo Tourism Village with sub business units such as Jangkang Hill, Bamboo Garden, Munggur Garden, Cendana Hill, animal sanctuary and facilities for visitors. Local attractions such as Angguk, Incling, Krumpyung, Ketoprak, and Jathilan are regularly held to keep local wisdom and attract tourists at the same time. Angguk is a traditional dance originating from Kulon Progo. All the players of the dance are women. Incling is local art played by men and women accompanied by gamelan music. While Krumpyung is a set of traditional musical instruments from bamboo. Both are combined in a performance by the name of Incling Krumpyung. Ketoprak is a kind of traditional drama performance that is believed to have originated from Surakarta and is growing rapidly in Yogyakarta. Similar with Incling, Jatilan art is a traditional art that developed in the area of Yogyakarta, Central Java and the surrounding area. There are as a part of local art that are defended by community in the region as cultural heritage.

Some species are protected include deer, pangolin, coconut hummingbird, and jungle fowl. In special seasons, visitors enjoy durian or mangosteen and involved in the process of making brown sugar or palm sugar. Destination is connected with other ecotourism destination such as Kalibiru, Pule Payung, and Canting Dipowono Hill. Therefore, all potential are as a lure natural tourist destinations nature.

These various tourist destinations are easily traced through the Kulon Progo tourist map as shown in Figure 1.

Suroloyo Peak ecotourism is at the highest peak of Menoreh Hills with an altitude of 1019 meters above sea level. From the peak, tourists can see four mountains in Java Island that is Merapi, Sindoro, Sumbing, and Merbabu. The improvement of facilities and road access by the local government increasingly attracts tourists. Not far from Suroloyo Peak, there is Nglinggo Tourist Village with tea garden and tea processing appeal as well as local coffee processing under the brand of Suroloyo Coffee and Menoreh Coffee. The beauty of nature and local cultural traditions attract more foreign tourists to come to Suroloyo Peak. This location is also connected with Borobudur, Mendut, and Pawon temple, so that foreign tourists are increasingly interested to enjoy coffee at Puncak Menoreh.

Kiskendo Cave is a legendary tourist attraction in Bukit Menoreh. The Ramayana of Sugriwa Subali was adapted to art drama and dance to be a regular routine in the location. Kriskendho Mrahaswara is one of the dance community that is able to package the story of Sugriwa

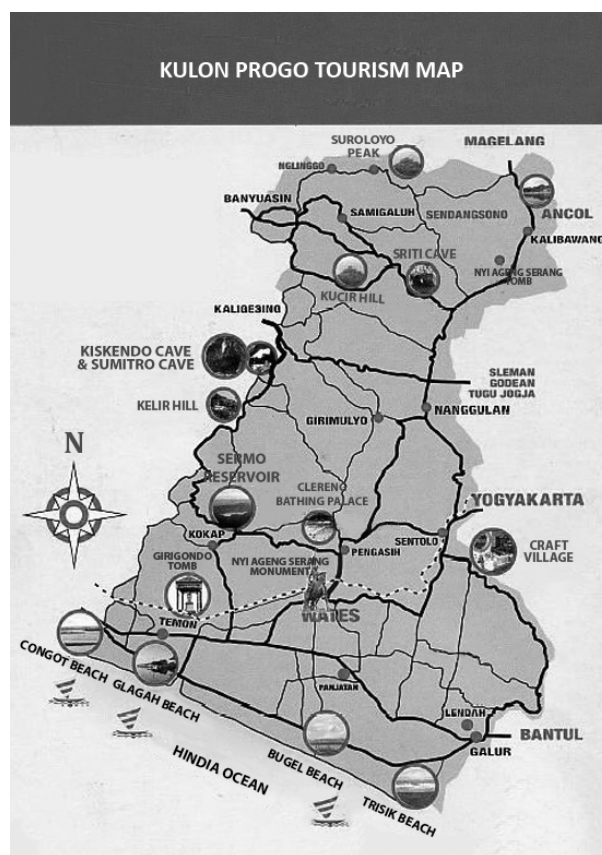


Figure 1. Kulon progo tourism map.

Subali become modern and interesting as a cultural attraction. This area is connected with nature tour of Mudal River, Kedung Pedut, and Ayunan Langit. The integration between cultural attractions and natural tourism around Kriskendo become a tourist attraction so that the number of visitors in the location is still more than visitors to beach tourism.

Inversely, tourist visits to Congot Beach are much lower than the previous. Tourism potential is diverted to the natural attractions of mangrove forest not far from the beach. The mangrove forest is managed by farmer groups with goal to preserve the ecosystem and improve the economy of coastal communities. For managing of mangrove forest cooperate to rice or shrimp farmers. In the last two years, the destination has become a destination favored by tourists. Meanwhile, visitors at Glagah Beach is a new airport for tourists, even for Trisik Beach tends to be unattractive with a less well-maintained condition. Even so, the destination began to be reorganized along with the development program of the south coast region in the Special Province of Yogyakarta.

4.2 Discussion

The results indicate the potential of tourism in Kulon Progo for foreign visitors is advantage-not specialized, so

that to raise the tourism potential to become specialized, it needs to be balanced with regulations and plans for investor cooperation. One example of the program being run by the local government is “*Bedah Menoreh*”. This program integrates infrastructure development by optimizing tourism potential in Menoreh Hills. It program connects the new airport with Menoreh tour and ends at the national strategic area development of Borobudur. The existence of Menoreh tourism destination serves as a buffer for Borobudur tourism park. With the preparation of such access, the regional government strategy must be integrated with tourism policies from rival regions. Therefore, the development of the tourism sector in Kulon Progo must be integrated with other districts in the Yogyakarta Special Region and Central Java Province.

Human resources quality improvement is provided through a training system for the community to improve the skills and knowledge that support the improvement of service quality to tourists or the ability to develop SMEs. Service to foreign tourists requires the ability to speak foreign languages, knowledge, and guide characters, so that the tour guide can speak a foreign language well, provides correct information, and provides good services to tourists. Program implementation will have a direct impact on improving facilities and services in the tourism industry.

An important factor is the role of government in the preparation of tourism regulations. In practice, Kulon Progo’s “*Bela and Beli*” policy has meanings to love and appreciate more local product compared to outside products. The local wisdom that has been developed into local branding includes brown sugar, Menoreh Tea, Menoreh Coffee, Suroloyo Coffee, and Pawon Gendis Chocolate. The development of local artists is encouraged to be able to create interesting performances. For improving the regulation above, it is better to build an icon “Kulon Progo House” as a center for promoting local products and tourist destinations in Kulon Progo. The promotion center serves as part of the Kulon Progo tourism marketing strategy. Positioning process is needed before designing the Kulon Progo House to suit the segment and target market of Kulon Progo tourists.

Local governments are expected to be faster and more serious to capture natural tourism opportunities. Jemparing Village stubs were immediately realized professionally. Kampung Jemparing is a tourism icon that elevates traditional archery during the Mataram Kingdom. At present, activities are still limited to training so that the destination development plan is realized through a variety of creativity in the form of: launching the Kampung Jemparing Website, a netbook school for children, souvenirs from Kampung Jemparing, live in Kampung Jemparing to being involved as organizers of the traditional archery national jamboree event. These breakthroughs increasingly lifted local genius as a tourism asset of Kulon Progo. In

addition to the icon above, Kulon Progo also has a Coffee Village icon. The location is at an altitude of 1000 meters above sea level so that the natural atmosphere of the countryside is very pronounced in these destinations. Life in the countryside and the traditions of the people must be well maintained so that foreign tourists are interested in staying in the Coffee Village. To develop these two icons, the Regional Government must selectively choose investors or partners who are strongly committed to sustainable development.

The coastal area south of Kulon Progo is less attractive compared to Gunung Kidul. The sand around the beach is used by the people as an agricultural land so that future development is more suitable for “coastal agro-tourism.” Farming technical innovation in the sandy land is a local genius that tourists need to appreciate. Assistance must be programmed immediately to help farmers implement traditional farming systems in coastal areas. On the southern coast, turtle conservation has been done but the program has not been continued until now. With reference to sustainable development, tourist destinations along the southern coast are more appropriately developed as turtle conservation as well as agro-tourism coast in Kulon Progo. With orientation to sustainable tourism development, the development of the tourism industry will provide welfare for the community, increase revenue for local government, and maintain environmental sustainability.

5. CONCLUSION

Overall, the result of shift-share analysis concludes that the tourism sector in Kulon Progo can be used as a sector that encourages economic growth. The tourism sector can be used as a propulsive industry and as a multiplier effect on other sectors. This conclusion is drawn from the positive values of Actual Growth, Regional Mix Effect, and Competitive Effect, as well as generating a Wide Effect Area value smaller than Actual Growth. This finding is supported by an increase in the number of tourist destinations and the number of tourists. Kulon Progo has new tourism potential as a buffer of Borobudur Tour in Central Java and completes Yogyakarta tourism destinations that tend to focus on Prambanan and Merapi. Another evidence is the regulation and development planning by local government that is in line with increasing access to international tourism. Thus, Kulon Progo with its community will be able to compete and play a role in international travel and tourism. In order to upgrade the advantage and specialized the destination, it is indispensable for Kulon Progo to take proper marketing strategies, to encourage the local creativities, to cooperate and integrate with main rival regions.

To compensate for the limitations of shift-share

analysis, another approach is needed to assess the competitiveness of tourism industry. Another way to do it is to use SWOT analysis to evaluate the development of strategies in tourism sector. As for implications, the result of sharing shift analysis can be used as benchmark or reference for tourism development. Entrepreneurs and SMEs can immediately focus on relevant and potential tourism business. While academics or NGOs can share the role of control over regulations and monitor the potential risks of tourism sector development.

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