Proceeding Paper

Revisiting Ferry Tourism Development in Indonesia †

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Abstract: As a specific form of water transport that involves a simultaneous carriage of passengers and cargo, the function of a ferry to bridge one area to another is threatened by the fast growth of air transport, which is not only faster and more convenient but also often cheaper than traveling by ferry. The objective of this paper is to identify market expectations of ferry services and to identify the opportunity for ferry tourism development in Indonesia. This paper is a market survey of 103 ferry passengers in seven locations in Indonesia: Merak, Bakauheni, Bayuwangi, Bali, Batam, Labuan Bajo, and Lake Toba. Data analysis uses descriptive statistics to identify customers' top-of-mind opinions. The results show that the market prefers extended digital platforms to co-create their experience, both in ferry services and their trips, shortened route ferries to enrich their experience on multi-transportation facilities, while providing more entertainment and recreational facilities on longer routes, as well as instagrammable spots, both on the ferry or in the terminal. There are also collaboration opportunities with sports and other communities to cater to weekenders to create island-hopping events on weekends. The conclusion is that ferry operators should conduct market surveys periodically to understand their markets and their requirements to cope with the ever-changing marketplace. In addition, co-creating products with community customers and product development innovations is the solution to make ferry tourism relevant to current and future demands.

Keywords: tourism; ferry tourism; water transportation; tourism development

1. Background

In order to achieve a competitive advantage, a company needs to consider two aspects: defining and managing activities in the production and consumption processes that are integrated into the company's value chain, as well as ensuring how the company's value chain fits into the overall value system in the tourism industry. The company's competitive advantage in the industry is determined by how dominant the company's contribution is in the value system of tourist destinations [1].

Tourism development is always associated with transportation services, as its growth is often measured by how advanced the adopted transportation technology is, and how easy the transportation makes the access to its destinations. In fact, transportation is one of the key factors that create tourism destinations [2]. The availability of transportation facilities and infrastructure encourages more intensive destination growth, offers more excursion options, and provided maximum connectivity to destinations [3].

Ref. [4] mentions that tourism and transportation infrastructure have an interdependent and incremental relationship. The first shows that the tourism sector is directly dependent on the means of transportation, as it has the ability to supply visitors to and from tourist destinations, as well as making the destinations convenient and cost-effective. The incremental relationship suggests that a basic level of transport infrastructure is required, especially in the early development of tourism destinations, to connect with the main source tourism market.

According to [5] the role of gateways and other transport hubs, in terms of whether they are central or intermediate, locations between important origins and destinations, close

to the market, as well as the gateway to tourist attractions, are the common elements of the locations in the travel network and visitor circuit that determine visitor travel patterns. Specifically, ref [2] mentions passenger ferry travel patterns with respect to the length of stay, purpose of visit, and travel index. According to ref [6], harbors, gates, and ferry services are also developing new travel experiences, so they recommend partnerships and involvement between businesses and other services used by passengers at ferry ports.

Ref. [2] mentions problems and challenges in tourism development: the access and distances; interest in tourism operators, availability of infrastructure; governance and policy; gateway facilities and local activities; and security, which result in the role of global water passenger transport that has drastically decreased since the last century, as many ferry services around the world are shutting down due to declining market demand and increasing financial deficits. This is due to the intense competition for modes, and the rapid development of road infrastructure (roads, tunnels, and bridges), as well as the rise in low cost carriers, which have caused the role of water transportation to become less important than it used to be [7]. However, water transportation, which has various unique characteristics, such as its proximity to nature and stunning views of the coastline and sky, can be promoted to regain the attention of tourists.

In recent decades, globally, ferry transportation has again received wider attention in the realm of public transportation, especially in several coastal cities such as Brisbane, New York, San Francisco, and London. Ferry tourism is considered a well-defined tourism landscape, being a network of actors linking within and across different communities and regions, transportation systems, accommodation and facilities, resources, environment, technology, and people and organizations with heterogeneous actors playing different roles [8].

Developing financially viable ferry services is a common challenge faced by ferry operators and local transport authorities. Often, ferry operators rely on public subsidies to maintain their operations. However, prolonged subsidies can add to the government's financial burden and have the potential to undermine the fare structure of public transport. Therefore, it is necessary to promote ferry travel while making ferry services financially sustainable, which remains a challenge [9].

Marine tourism is a tourism niche that combines all marine recreational activities with the aim of enjoying beaches, ports that offer facilities and services for tourists on dry land, cruisers and yachts, as well as other marine activities. In other words, marine tourism is all activities on land, offshore, and water using floating, underwater, and onshore infrastructure with a strong marine component [9]. The importance of the niche is not only limited to factors and facilities and infrastructure at sea, but also involves cultural conditions, land facilities, and the environment at the marina, on land, and around the coast. Marine tourism is one of the most complex niches involving several actors and institutions in the production and consumption processes [10].

2. Methodology

To obtain the primary data, questionnaires were circulated directly and through a Google form to ferry passengers who had experienced traveling by ferry in 2021–2022. The random sampling method was applied, and there were 103 respondents in total. There were closed questions asked about the customers' perception of ferry services and open questions to explore the customers' ideas to improve their satisfaction and experience. Descriptive statistics are used to describe the overall perceptions of the ferry customers, while the most common inputs from the open-ended questions are presented as findings to improve ferry services and utilize them to enhance islands as destinations. The perceptions of the respondents are measured in on a four-point Likert scale with the following responses: VA (strongly agree), SA (somewhat agree), SD (somewhat disagree) and VD (strongly disagree).

3. Results and Discussion

3.1. Market Profile and Consumption Characteristics

3.1.1. Age Range and Employment Backgrounds

Figure 1 shows that most of the ferry service users are in the age group below 26 years (Generation Z), while the age group of 27–40 years (Millennials) constitutes 28.4%, and 17.6% for the age group of 41–56 years (Generation X). These numbers shows that ferries are in demand by young travelers who are open to new experiences and have time to travel, but have limited budgets to travel. In the productive age group between 41 to 56-year-olds, who are at the peak of their careers, traveling by ferry is not very popular due to limited traveling time or choosing other, faster, modes of transportation. On the other hand, this group is an established age group that is not very sensitive to costs. Generation Z, in the age range of 18–26 years, who have a high level of self-confidence, get along with anyone, and appreciate small things, will also foster broader awareness to see the world [11].
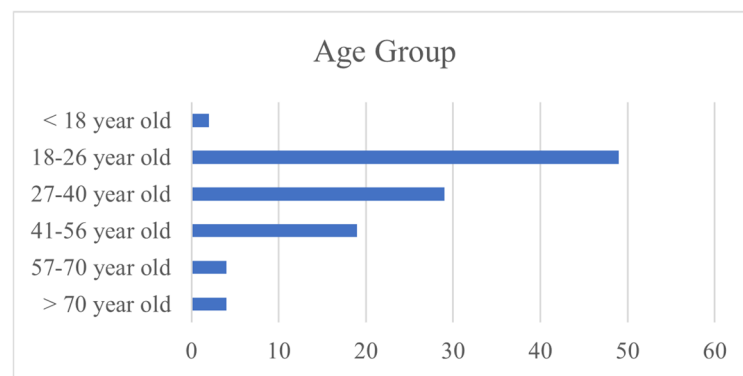

Figure 1. Respondents' age groups.

Most of the respondents are working in private companies (44.1%), students (29.4%), and army/police department/government employees (18%). From this, we figure that the passengers are paying with their own savings.

3.1.2. Respondents' Domicile and Travel Characteristics

The main market for ferry services comes from the island of Java, namely, Jakarta (54.6%), West Java (13.7%), and Banten (7.8%).

Referring to Figure 2, below, 82.4% of the respondents prefer travel by ferry with their family, 41.2% travel with friends, 12.7% travel alone, and only 9.8% are part of tour groups.
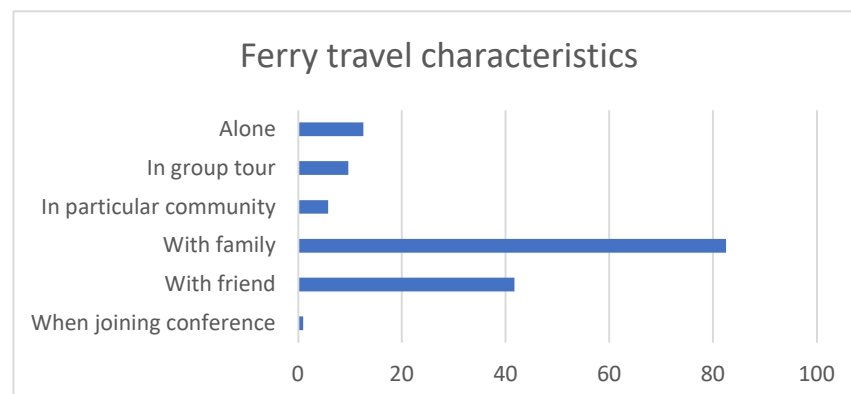

Figure 2. Ferry travel characteristics.

3.1.3. Respondents' Ferry Travel Motivation, Duration of Travel, and Favorite Destinations

As many as 70.6% of respondents mentioned that they travel by ferry for holidays; almost 50% travel for business; and 44.1% for hometown visits (refer Figure 3). From this perspective, tourists are interested in traveling by ferry when taking holidays.
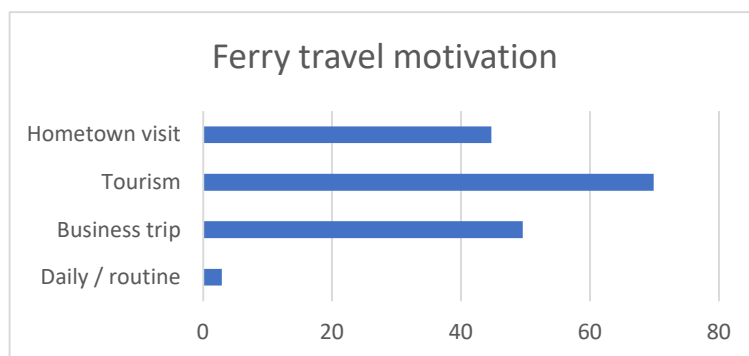

Figure 3. Ferry travel motivation.

Figure 4, below, shows that respondents are willing to travel by ferry for trips no more than 4 h, while the most preferred duration of travel is 2 to 4 h. The following conditions show that the travel time that can be tolerated by tourists in using the ferry is up to 4 h of travel. Although the preferred journey time is between 2 and 4 h, a maximum of 8 h can still be tolerated by tourists, even though they will use other modes of transportation if there is a choice. From the data results, it can be said that the tolerance limit of passengers to enjoy the ferry is due to the relative levels of service, in which there are variables of comfort and pleasure [12].
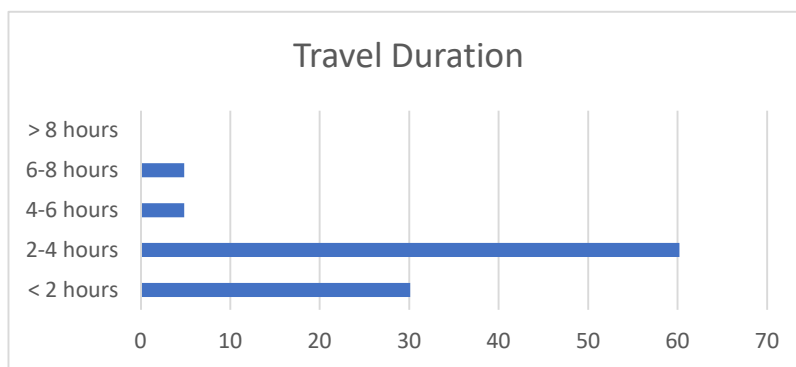

Figure 4. Ferry travel duration.

Figure 5 confirms the respondents' duration of travel preference with the favorite destinations: Merak to Bakauheni, Java to Bali, and Bali to Lombok. From Figure 5, it is seen that ferry's favorite routes are those with easy and convenience access, or well-known tourist destinations. Figure 5 above shows that the Merak to Bakauheni route is the respondents' favorite route, in addition to routes that are major tourist destinations, such as Java to Bali and Bali to Lombok. Sea transportation is still the choice of many people in traveling, evidently, based on data from the Central Statistics Agency (BPS, 2019). Lampung Province is the top choice for sea transportation compared to other means of public transportation, such as trains and planes. The choice is also based on the fact that the cost spent traveling by ferry is relatively lower than using an airplane. In addition, the connectivity of Java and Sumatra Islands still relies heavily on ferries from the Merak to Bakauheni ports. The development of the Merak to Bakauheni port, which is getting better, is also the choice of the community. One of these developments is that the departure and arrival doors have been separated, the drop zone is increasingly comfortable, and there is a

guardrail to avoid ticket scalpers who tend to be troubling [13]. With such results, there is a greater potential to travel by ferry without the concerns that previously occurred regarding the security and safety of passengers.
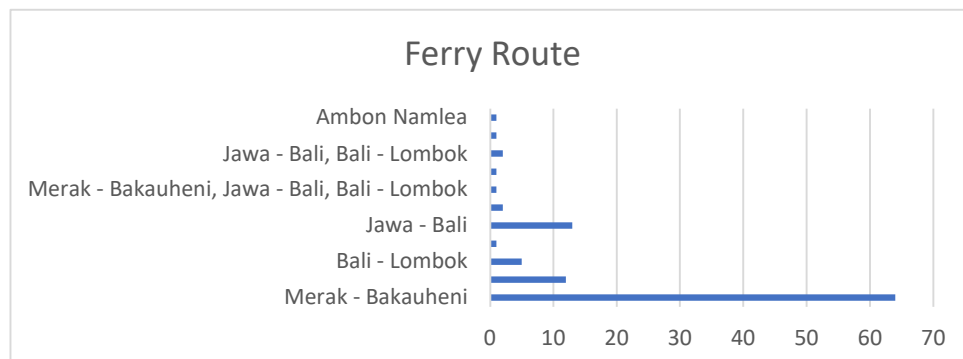

Figure 5. Ferry routes.

3.1.4. Respondents' Sources of Information, Ticket Buying Characteristics, and Promotion Media Channels

The way to convey information about the latest products from the ferry is through social media (55.9%); by e-mail (46.1%); through digital applications (17.6%), through WhatsApp groups (11.8%); and via SMS (6.9%) (see Figure 6). Social media is the most effective advertising portal, for now. Social media is a medium where users can create content and applications and which allows users to interact and exchange insights with other users [14].
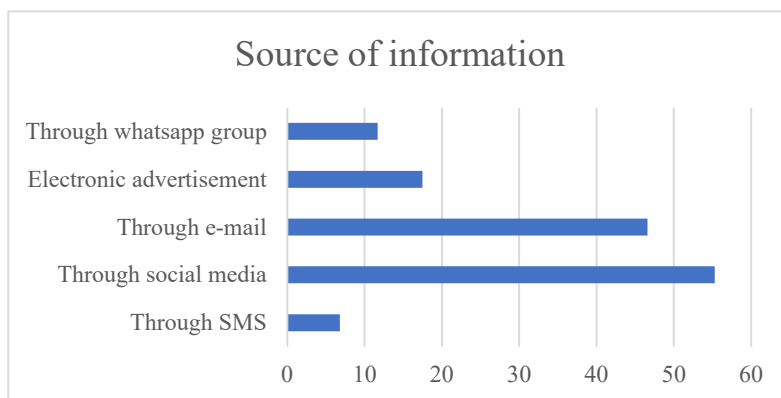

Figure 6. Ferry sources of information.

Figure 7 shows the types of tickets used by the respondents, while the respondents can choose more than one answer. Most of them are by vehicle (53.9%), regular tickets (38.3%), and express (35.3%). This indicates that the main motivation for traveling by ferry rather than other routes is because customers can use their private vehicles, which is considered very competitive, and the ferry is also in demand for respondents who have budget concerns. Interest in using the executive ferry is also very large, because it can save respondents' time. This also relates to the flexibility of passengers to continue their journey without having to find and wait for other transportation.

Figure 8 shows the market's desire to get ferry tickets by buying directly at the ferry terminal counter (54.9%), through digital applications (35.3%), including bundling prices for both tour packages and buses (27.5%), and buying at the special counter (15.7%). Purchasing through digital applications is increasingly in demand, along with the technological advances in Indonesia to support the implementation of the smart city concept.
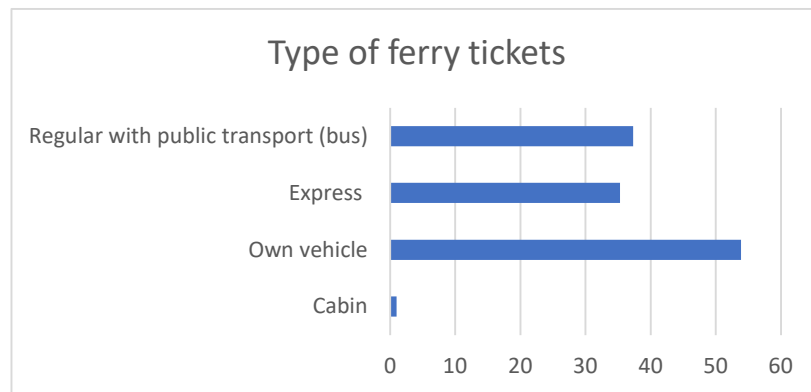
Type of ferry tickets

Figure 7. Types of travel tickets by ferry.
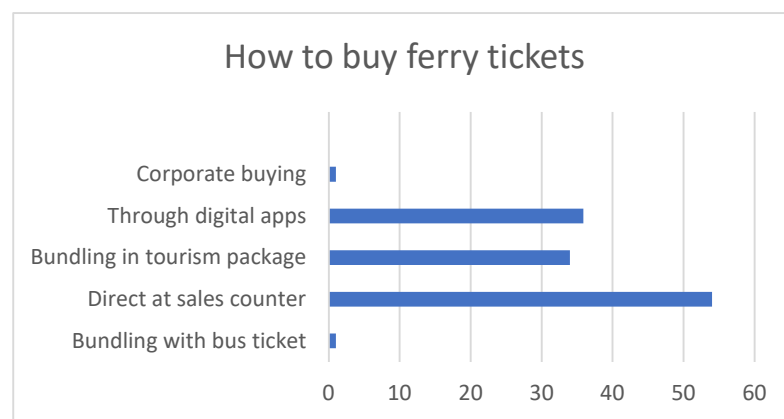
How to buy ferry tickets

Figure 8. How to buy ferry tickets.

3.2. Ferry Tourism

The types of tourism that are of interest to respondents are, respectively, nature and adventure tourism (68.6%), recreational tourism (56.9%), cultural tourism (47.1%), and shopping tourism (33.3%). These figures highly relate to the market profile of the ferry passengers, primarily Millennials and Generation Z, who are more active, curious, and adventurous (refer to Figure 9).
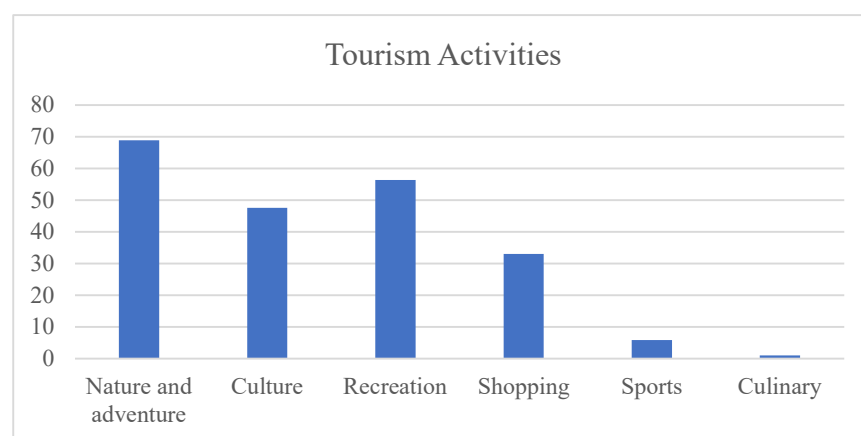
Tourism Activities

Figure 9. Interested type of travel.

The amount of money respondents spend or prepare for traveling is from Rp. 1.000.000 up to Rp. 5.000.000 (56.9%) and from Rp. 5.000.000 up to Rp. 10.000.000 (33.3%). Compared to the ferry ticket's price, around Rp. 250.000 per person or Rp. 700.000 per vehicle, the

amount of money to be spent is quite a lot. Therefore, the ferry must be able to make the passengers spend more money either during the ferry travel, at the ferry ports, or at the destinations.

3.3. Improving Ferry Travel Experience

Certain factors will affect the quality of the experience of traveling by ferry, which is divided into two parts: the important products and services at the port, and those on board the ferry.

3.3.1. At the Ferry Port

Figure 10, below, shows that 63.7% of respondents strongly agree with the need for accommodation facilities around the ferry port, and 32.4% agree. Further, a total of 56.9% of respondents agreed to the need for vehicle rental facilities at the ferry port, and 17.6% said they strongly agreed. However, 25.5% do not agree with the vehicle rental facility. This is probably due to many ferry passengers bringing their own vehicles. On the need for cafes and restaurants to be available at the ferry ports, the majority of respondents agree (55.9%) and strongly agree (40.2%). As many as 51% of respondents stated that the availability of tourist information at the ferry port was very important, while another 42.2% said it was important. This is related to the ease of passengers and tourists in obtaining tourist information without having to go to another place just to get it. Next, according to 63.7% of respondents, freight forwarding facilities at the ferry port were stated to be important, while 27.5% stated that they were very important. There were 8.8% who did not agree with the provision of this facility; this is likely due to the buildup of cargo, which can hinder the registration process of passengers. Related to shopping center facilities, a total of 47.7% of respondents agreed, and 41.2% said they strongly agreed with the provision of shopping center facilities at the ferry port; this shows that the shopping center facility makes it easy for passengers to buy the souvenirs they need.
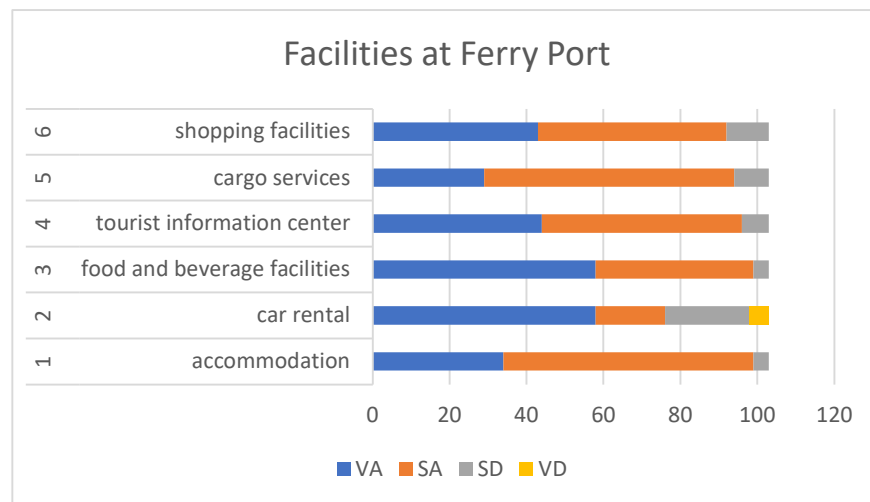

Figure 10. Facilities at the ferry ports.

3.3.2. On the Ferry during Travel

There are several things that are considered important by passengers traveling by ferry, including the availability of recreation areas, children's play areas, food and beverage facilities, shopping centers, business facilities, accommodation services, travel time, the timeliness of arrival and departure, the freedom to carry goods, entertainment facilities, and traveling with your own car. From Figure 11 below, it can be seen that a total of 47.1% of respondents stated they strongly agree, and 45.1% agreed to the need for various entertainment facilities during the trip by ferry. The duration of the ferry journey means that passengers need entertainment to distract them from the anxiety of the waves and

the dynamics of sea travel. Further, as many as 52% of respondents strongly agree that traveling by ferry can have more freedom to carry goods, 33.3% agree, and only 14.7% disagree. This is because the capacity of the ferry is very large, allowing passengers to carry a large amount of goods.
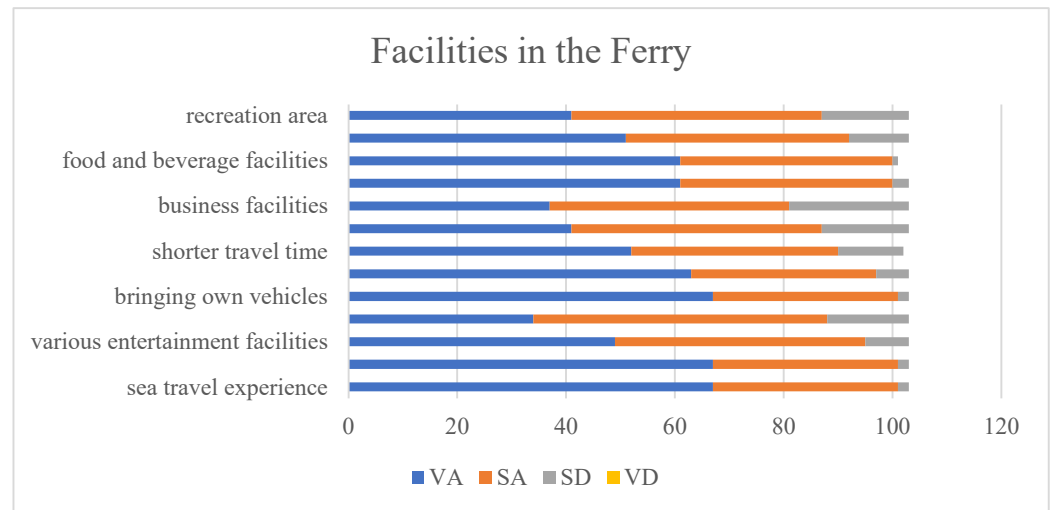

Figure 11. Facilities on board the ferry.

Related to the possibility of bringing your own vehicle on a ferry trip, as many as 65.7% of respondents stated that they strongly agree that traveling by ferry gives the possibility to bring private vehicles, and as many as 32.4% agree. Another important point is related to the timeliness of departure and arrival. A total of 61.8% stated they agree with the importance of punctual departure and arrival times of ferries, and as many as 32.4% strongly agree. This is very important, because the purpose of passengers or tourists is one of business, so timeliness is necessary. Next, as many as 51% of respondents stated they agreed with the importance of shorter travel times by using the ferry, as many as 36.3% strongly agreed, and 11.8% disagreed; the basic reasoning is that it relates to the anxiety level of passengers when traveling by sea, so it is important that the shorter the duration of travel time, the better.

3.3.3. Ferry Services and Tourism Business Development

Concerning the potential for business development in ferry services based on the respondents' preferences, the first rank is the availability of special cabins/accommodation on the ferry (66%). This means that there should be the potential for ferries to rent out cabins or rooms specifically for families, or groups to charter ferries for special trips. This is because the pandemic period makes tourists reluctant to mingle with strangers and want to feel safe traveling by public transportation. This is also in line with the results of research, which states that the available accommodation space affects the level of passenger comfort [15]. Secondly, the provision of reservation facilities for groups or families (64%) means the provision of special family reservation facilities, which can also be developed, considering the large number of passengers, especially, during the peak season; the reservation system will facilitate better passenger service.

The next in line is the potential for special offers on trips to special attractions at the destination (62%), where a special offer system needs to be created and implemented. Passengers currently need a one-stop service for their travel activities. Furthermore, offers combined (bundling) with tour packages (58%) and special offer packages: MICE/Event (44%) are in demand by passengers, so the provision of special offers for tour packages is needed. When the demand is there, the next offer will be easier to implement. Some respondents' were interested in special boat rental offers (charter) (40%) and requests for a

few days voyage offer (39%) also appeared. These cases also have potential as new business developments (Figure 12).
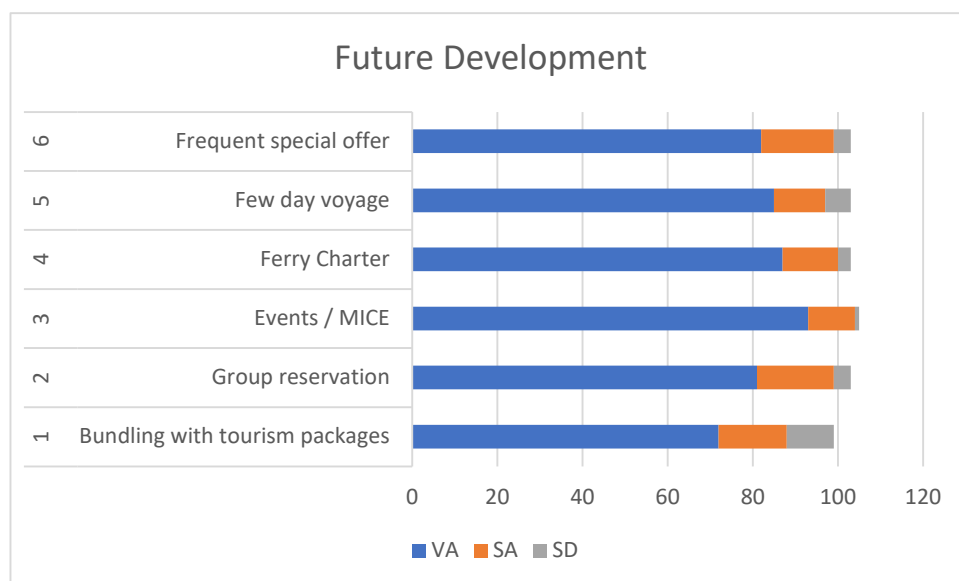

Figure 12. Business development and ferry services.

3.3.4. Respondents' Opinions for Developing Ferry Tourism

Public transportation is very important in increasing the rate of economic growth, because public transportation is one of the tools for community transportation in carrying out economic activities [16]. Therefore, so that people want to use public transportation, services related to the quality of public transportation must be improved, including water transportation (ferry). One way to improve the quality of ferry services is to know the opinions or preferences of passengers. The following are passengers' opinions directed to improve the quality of ferry services.

Focus on maintaining the cleanliness and comfort of tourist facilities.

The cleanliness of all the areas on the ferry is a basic demand of tourists, especially in the toilets, so there needs to be special staff who always ensure the cleanliness of the toilets on the ferry. The pandemic condition also causes tourists to be more sensitive to cleanliness and sanitation. Passengers who are tourists do not mind paying a per person fee to get a clean toilet and room, so that it can be allocated to pay for the cleaning staff on the ferry.

Ferries can also develop several prices with special facilities offered so as to improve the tourist experience, especially in ensuring the cleanliness of the facilities provided for tourists. Respondents also associate cleanliness with comfort, especially in tourist areas such as dining and drinking areas, recreation and entertainment areas, children's playgrounds, decks, and other locations they want to access. This comfort is developed with attractive decorations, looking clean and tidy, and using appropriate facilities or ones that can be used and maintained. Comfort and security are aspects that tourists want to have, not only on the ferry but also in the port and around the port.

Punctual departure and arrival time.

Service quality is a measure of fulfilling customer needs and expectations [17]. Customer perceptions will determine and assess the quality of service, because the one who enjoys and feels the service provided is the customer himself. Therefore, one of the things that increases the quality of a ferry service is the timeliness of departure and arrival. One of the attributes that need to be examined in service quality is timeliness. The timeliness of departure and arrival also affects the next passengers' activities. Some passengers already

have a specific schedule that must be met when traveling, so punctuality greatly affects the efficiency and effectiveness of passenger or tourist travel.

Provision of Tourism Facilities.

The respondents stated that to increase the attractiveness of travel by ferry, it is necessary to develop tourist facilities as follows:

- Recreation and Entertainment Facilities.

These recreational facilities include facilities for reflection, karaoke rooms, mini theaters, and play areas for children to adults, with facilities that are fresh and well-maintained, equipped with sofas with reading materials, agility games such as darts, cards, a pool table, and so on.

- Instagrammable Photo Spots.

With so many Millennial generation tourists who use the ferry when traveling, creating interesting spots with Instagrammable properties and backgrounds is an effective option to enhance tourists' memories. The photos that will be uploaded by tourists on their social media will be a very effective promotion for traveling by ferry. Some tourists even suggest providing a photographer so that the resulting photos can be more professional.

- Facilities for special needs (disabled) and parent-friendly.

Ferries need to consider conveniences for parents and passengers who have special needs, such as using a wheelchair, and so on.

- Wi-Fi facilities during the ferry trip.

With the increasing importance of connectivity between tourists and friends and family, the wi-fi facility during the trip is something that is highly appreciated by tourists and needs to be considered by companies.

- Live music.

Most of the respondents stated that the entertainment they want when using the ferry is live music or special performances, so as to reduce boredom, especially for trips of more than 2 h, which are held, for example, in a comfortable lounge.

- Other facilities, such as cabins, interesting souvenir and snack outlets, cafes, and shopping areas.

On the ferry, it is suggested that services can be improved, namely providing service options such as tickets with cabins for accommodation on the ferry, souvenir or snack outlets, cafes, and shopping areas.

3.3.5. The Way Forward

According to respondents, ferry operators should collaborate with destinations, tour operators, or event planners to develop integrated tour packages on a digital platform that is able to create a whole and holistic ecosystem of marine tourism. Collaboration should be carried out to develop and offer integrated tour packages to visit interesting tourist attractions at destinations in the port, which can be accessed by groups of tourists who do not use their private vehicles.

It is also important to build special tourist ferries with shorter routes to visit interesting islands, tourist attractions, and connect each of them, especially those difficult to reach by land, to create more interesting products and experiences.

Effective promotion is needed not only to increase consumer brand awareness, but also important to introduce new products of ferry services and tourism, as they will not progress without promotional activities. Through promotion, prospective tourists, both domestic and foreign, will be able to know with certainty and more accurately about the destination or place visited. Likewise, ferries and their related tourism activities require continuous promotion, so that the product is well conveyed to prospective passengers or

tourists. There are many ways to promote through several media, both conventional media and digital media. For now, in the era of industry 4.0, digital media is more attractive because digital media spreads faster than conventional media. Next, after targeting digital media, there are several ways to conduct promotions, such as placing advertisements in the media to attract visitors, promotions in e-commerce with attractive prizes, and making special promotions on social media.

The suggestion was also made to develop an integrated and sustainable marine tourism destination around ferry ports, such as developing attractive tourist attractions around the port. The activity needs close collaboration among stakeholders, especially local governments, ferry businesses, and other tourist attractions in the areas around and beyond the ports. One of the strategic steps is linking all the attractions and facilities, especially culinary and cultural attractions, sports tourism, playgrounds, and recreational facilities, as well as making them accessible physically and digitally through apps.

Tourist amenities or facilities and services should be also considered to meet the needs of tourists when they are away from their homes, which meet a good standard and pay full attention to cleanliness, comfort, and safety for tourists, which can be done in cooperation with potential tenants. The amenities could include hotels and meeting rooms at the harbor or the area around the port, restaurants, cafes, souvenir centers, shopping arcades, elderly and special needs-friendly facilities, and unique and interesting photo spots.

The port area must be a hub that connects with other modes of public transportation. Another way is to enable sharing-based transportation applications, such as Gojek/Grab/Maxim, etc. This collaboration can also be done with travel agents around the port. Considering that the condition of travel agents is not as good as it used to be, this will be a good turning point for the rise of online travel agents.

Besides the physical and traditional enablers, tourist information management plays an important role in shaping a quality tourist experience. This means providing a tourist information center that is able to manage clear information about public facilities, events, communities, tour guides, and services that can be accessed by the public, not only physically, but also digitally, including tourist maps and information on how to access the desired facilities and services, as well as clear information regarding ship departures and arrivals, docks, routes, and so on.

4. Conclusions

Traveling by ferries and developing ferry tourism that connects many interesting and unique attractions, facilities, and activities could attract Millennials and Generation Z customers when they are integrated within digital platforms, and offer clear information and messages to co-create experiences in real time. As these generations seek new adventures and experiences, there is a need to extend facilities, and for innovative ideas to enable them to be active and enjoy the trips. Their spending can be improved if ferries and ports can offer more services and values that can make the most of their experience. Ferries and ports must provide and create digital applications that can offer one-stop services. These generations also like to have all their needs met during traveling by ferries or at ferry ports by the provision of food and beverages, shopping facilities, cargo services, tourist information centers, recreation facilities, and photo spots. Furthermore, cleanliness and safety have become priorities, as people have become much more sensitive since the Covid-19 pandemic, while punctual arrival and departure are also still important for ferry users. Effective digital promotion also needs to be done, as well as creating smart sustainable ports to ensure a smart and sustainable ferry business. It is imperative that ferry operators conduct regular market surveys to understand the markets and cope with their ever changing needs.

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