

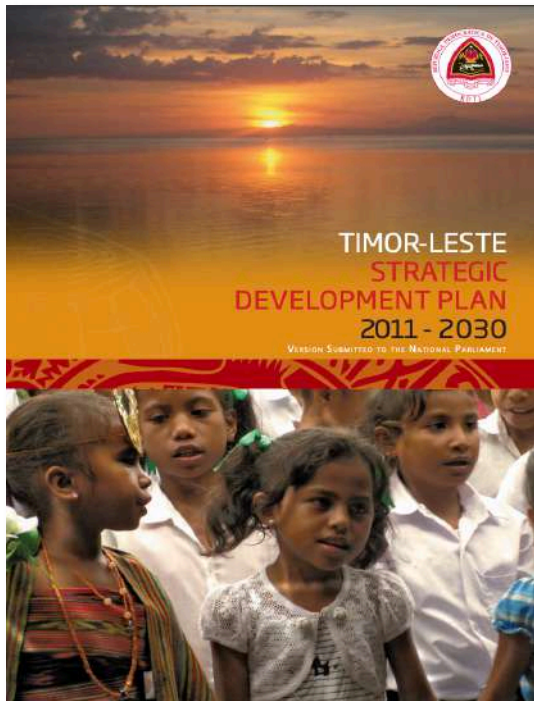


# **TIMOR-LESTE TOURISM INVESTMENT FORUM**

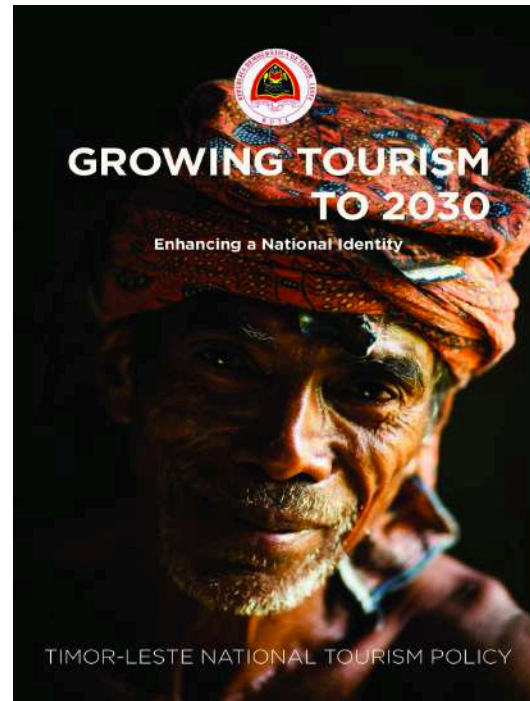
**Explore the undiscovered destination in Southeast Asia  
CCD - 21 - 22 of November 2024  
Antonio da Silva – Director General of Tourism**



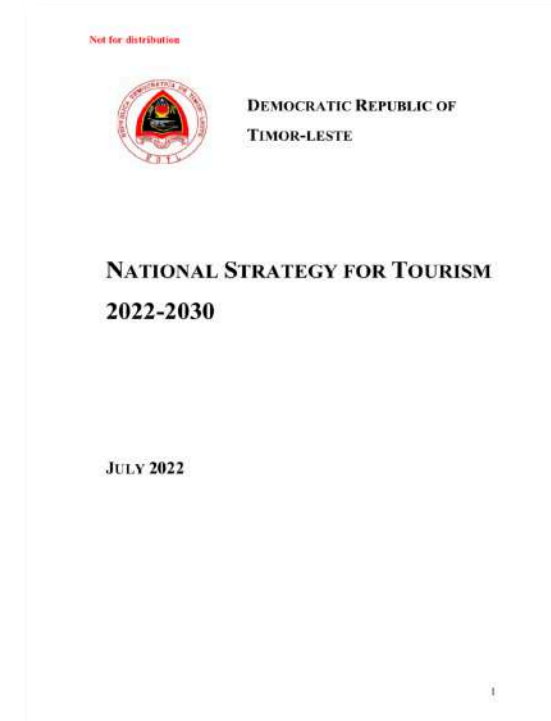
# TIMOR-LESTE TOURISM DEVELOPMENT



**Tourism is one of the priority sectors to thrive and expand, thus contributing to economic development, job creation and strengthen society.**



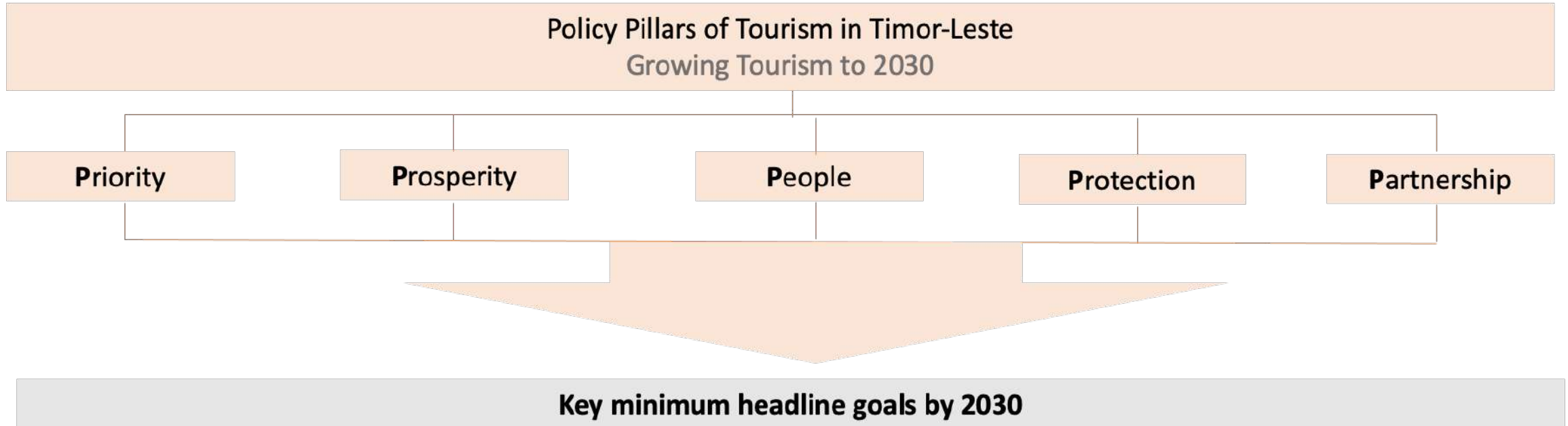
**The Tourism Policy sets the path for the development of Tourism in Timor-Leste, based on 5 Priority Pillars: Priority, Prosperity, People, Protection, Partnership**



**Establishes strategic vectors of intervention and proposed actions in order to accelerate and boost the development of Tourism in partnership with all stakeholders', including national institutions, civil society, development partners and private sector.**

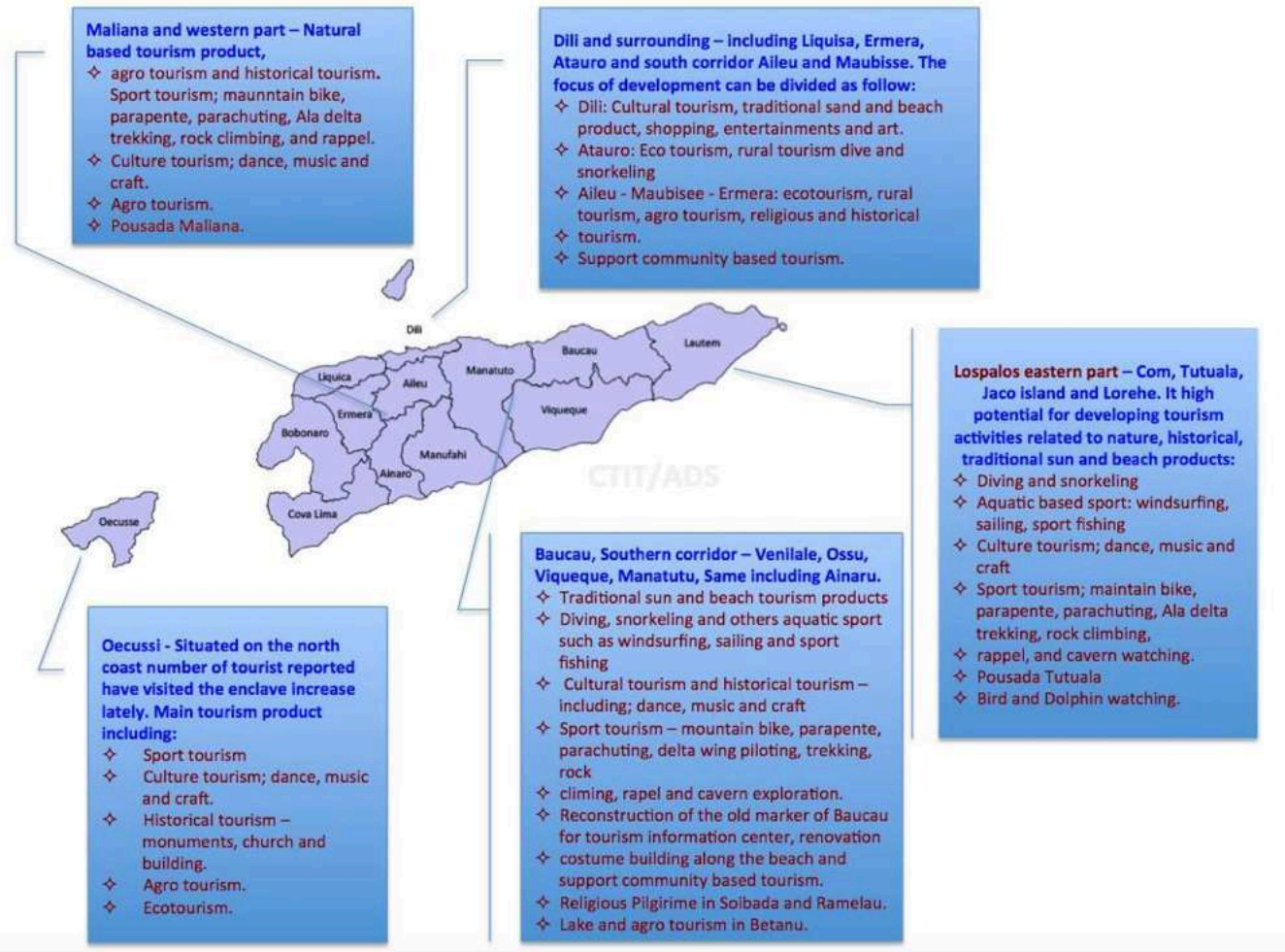


# NATIONAL TOURISM DEVELOPMENT ESTRAATEGY



- **Revenue from overseas tourism and international visitors, excluding carrier receipts (air fares and ferry charges) will be at least US\$150 million per year (at 2016 prices i.e. adjusted for inflation between now and 2030).**
- **Employment in tourism will exceed 15,000 (approximately 4,300 at present)18.**
- **At least 200,000 international tourists will visit Timor-Leste annually with an average stay of five days.**

# TOURISM DEVELOPMENT PRIORITY



1. Tourism activities regulation
2. Tourism infrastructure development
3. Enhance tourism products and services supply
4. Adapt sustainable & environmental responsibility tourism concept
5. Legal, institutional, and business framework
6. International institutional framework
7. Invest in human resources
8. Support to tourism entrepreneurship
9. Engage people in tourism development process
10. Define Destination marketing.



# TOURISM RESOURCES AND DESTINATION POSITIONING



**Diving - Snorkeling - Whale Watching - Heritage Culture - Adventure - Coffee tourism - Historical Tourism - Religious tourism – Cruise tourism – Volunteer tourism**

## **I. NATURAL ASSETS UNIQUE EXPERIENCES**

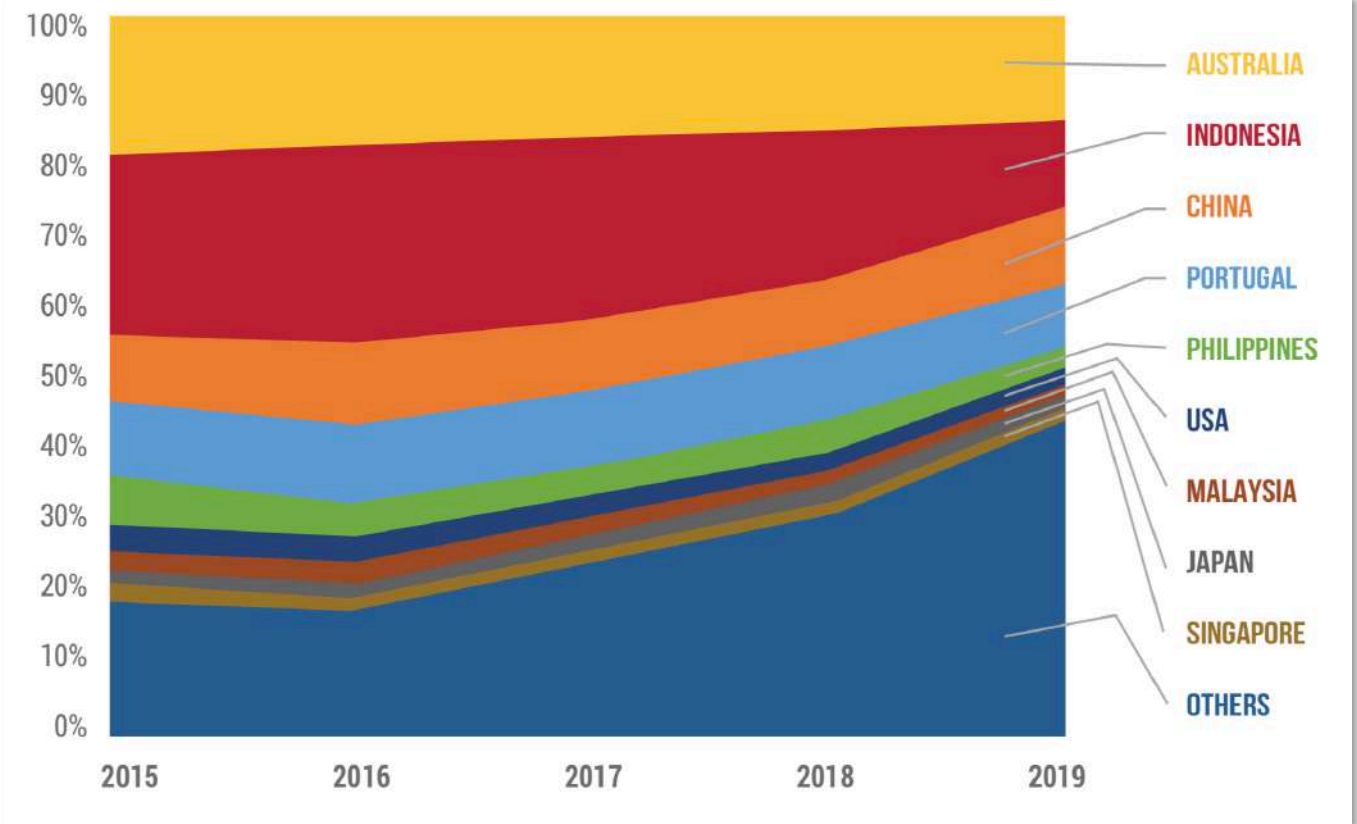
- To appreciate pristine nature and beautiful sceneries
- To appreciate biodiversity, especially in marine life
- To discover the undiscovered and unknown
- To find new adventures, excitement, and “raw” and “rugged” experience

## **2. TO EXPERIENCE SOMETHING MORE AUTHENTIC**

- Non-commercial experience compared to other popular destinations such as Indonesia and Thailand
- To learn and appreciate new culture

# INTERNATIONAL ARRIVAL

Year	Total Overseas Travelers	Tourist Travelers (Leisure, VFR, Holiday-makers)	Business Travelers
2010	43,447	18,049	25,398
2011	50,297	23,815	26,482
2012	55,839	28,588	27,251
2013	77,868	49,220	28,648
2014	59,811	30,535	29,276
2015	61,590	31,277	30,313
2016	65,642	34,632	31,010
2017	73,837	42,533	31,304
2018	74,661	43,027	31,634
2019	80,758	48,201	32,557



Source: Baseline Supply and Demand Analysis with Consumer Perspective, World bank Group 2021

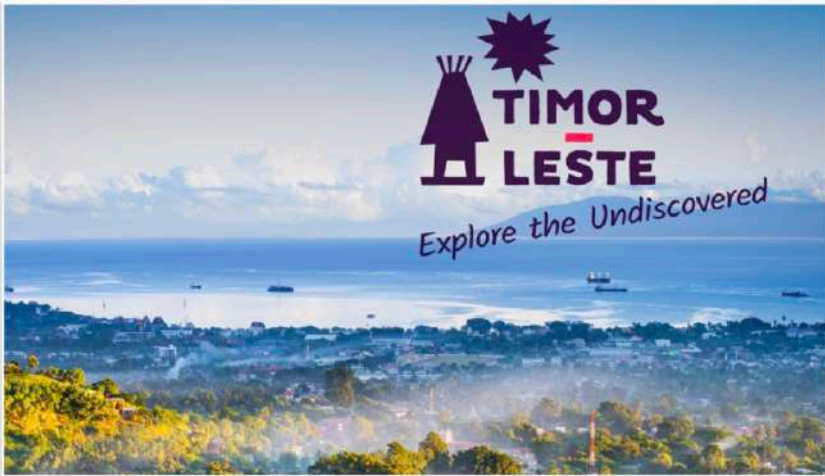
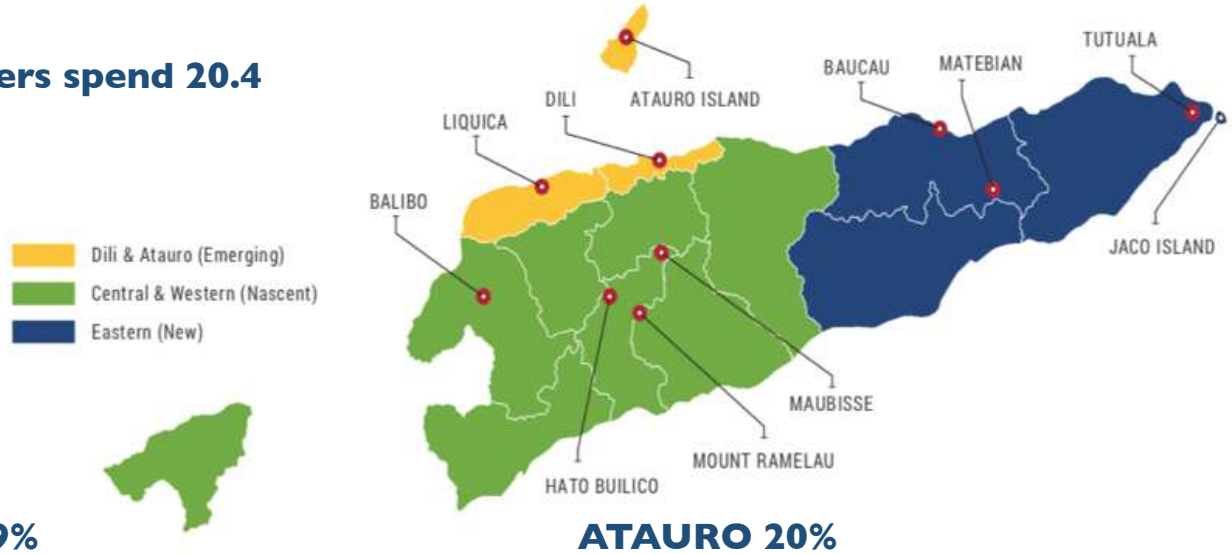
**Diving - Snorkeling - Whale Watching - Heritage Culture - Adventure - Coffee tourism - Historical Tourism - Religious tourism - Cruise tourism - Volunteer tourism - MICE tourism**



# THE MOST POPULAR LOCATION FOR LEISURE TRAVEL

## 2023 Survey of Travelers to Timor-Leste

32,187 Leisure Travelers spend 20.4 millions



# TOURISM POTENCIAL MARKET VALUE

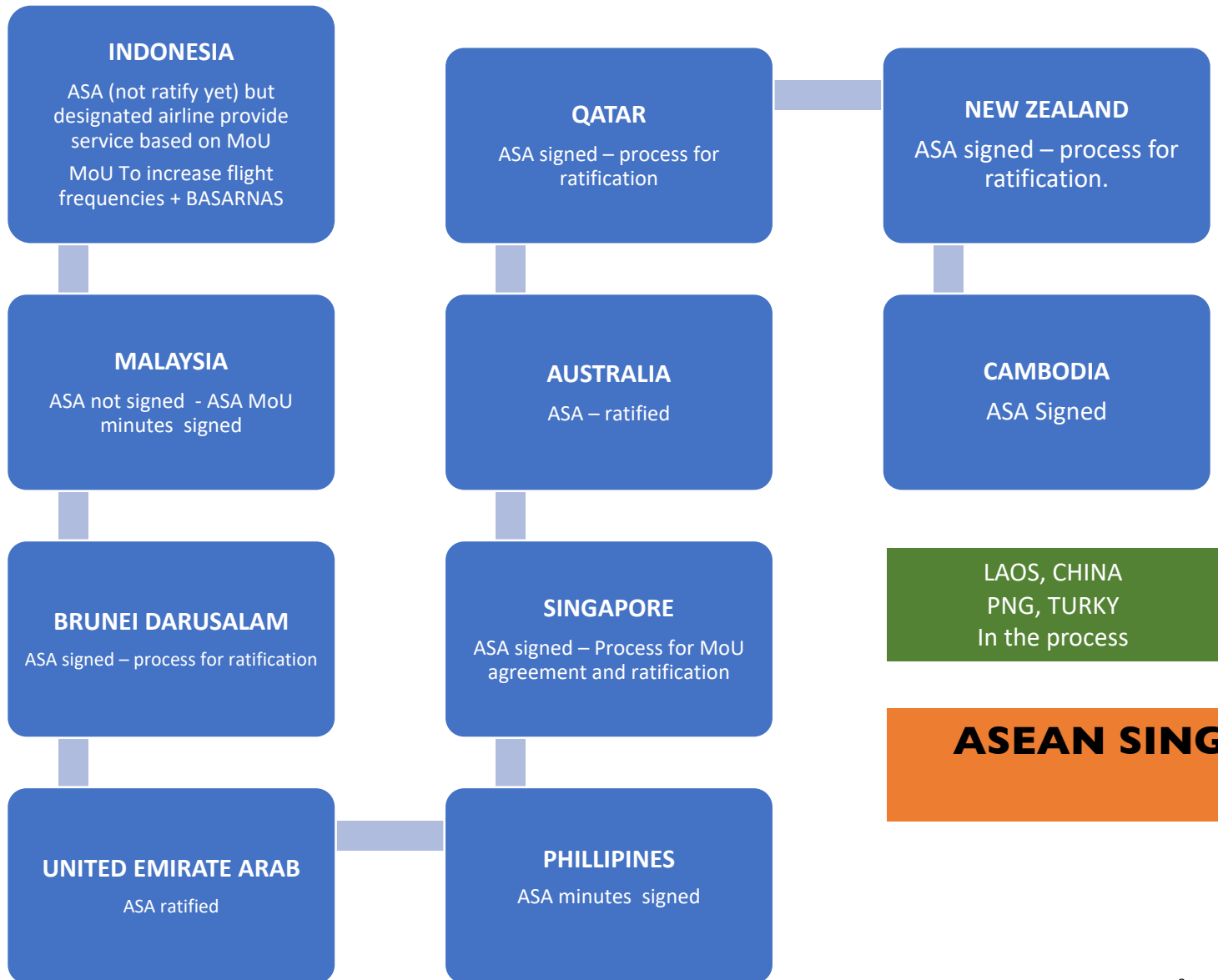
Travel Segment	Approx. Market Size (Global in USD)	Timor-Leste Opportunities
Scuba Diving	\$35 Billion	Hard-core divers and leisure divers through promotion of dive sites, upskilling and accrediting dive resorts and dive-masters and the development of a hyperbaric chamber locally in Timor-Leste.
Cultural and Heritage Tourism	\$600 Million	Tourism facilities to support visitation to key sites of significant buildings, monuments, museums. Development of facilities such as transportation, guides, public toilets, plazas, cafes, shops, etc.
Hiking & Trekking	\$660 Million	Investments in route accessibility, promotion and signposting, and the development of new guided hiking trails and routes. Combine promotion and packaging of treks and hikes with cultural and natural experiences such as homestays and regional accommodation and tours. Invest in the training and accreditation of tour guides, ensuring they have adequate knowledge of the sites, languages, and people skills to meet travelers' expectations.
Cetacean Tourism	\$2.1 Billion (2008)	Promotion of Timor-Leste's unique offering of its year-round range of migrating cetaceans. Collaborate with the International Whaling Commission (IWC) to establish good practices to grow this segment sustainably by licensing and accrediting operators.

Source: Baseline Supply and Demand Analysis with Consumer Perspective, World bank Group 2021

**Diving - Snorkeling - Whale Watching - Heritage Culture – Adventure - Coffee tourism - Historical Tourism - Religious tourism – Cruise tourism – Volunteer tourism - MICE tourism**



# AIR SERVICE AGREEMENT (ASA)

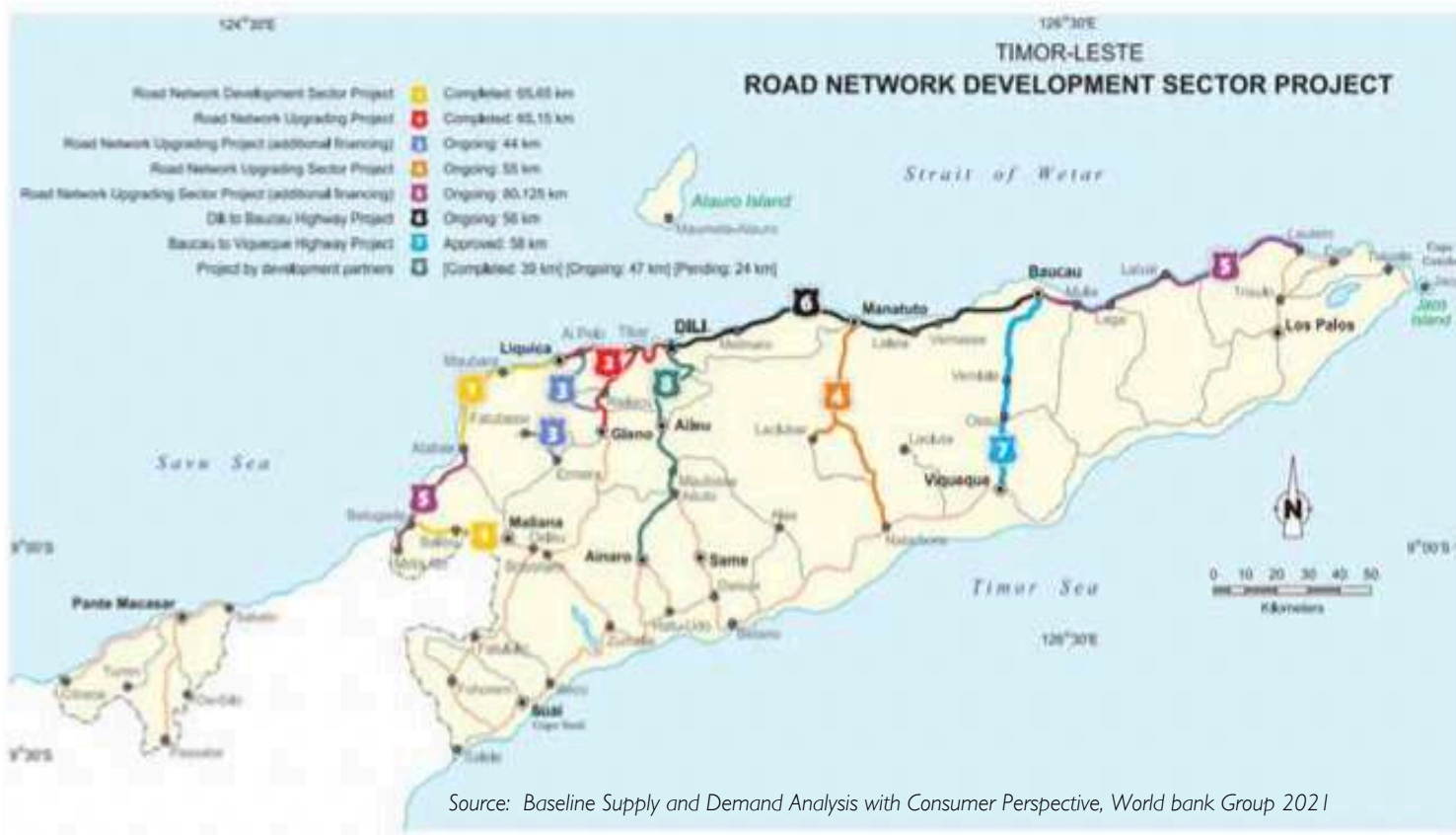


## ASEAN SINGLE AVIATION MARKET (ASAM)





# LAND TRANSPORT



The key tourism routes are as follows:

- **Route 1, 2 5: Dili – Balibo [Completed 39 km]**
- **Route 4: Baucau – Ossu**
- **Route 5: Baucau – Lautem [Completed 81 km]**
- **Route 6: Dili – Baucau [Completed 56 km, Ongoing 49km]**
- **Route 8: Dili – Maubisse – Ainaro [Completed 87 km] [Ongoing 23 km]**



# TOURISM SERVICE CAPACITIES



- **186 Accommodation establishments offering a 2,471 room capacity ranging from: Hostel, Resort, Eco-Lodges, Guest houses, Homestays, Pousadas.**
- **MICE venue: accommodate 100 up to 1000 guests.**
- **Inbound tour operator: Currently 12-20 active tour operators and most are small-to-medium-sized.**
- **Local Transport: Car rentals and public transport.**



# TOURISM INVESTMENT OPPORTUNITIES



Source: Baseline Supply and Demand Analysis with Consumer Perspective, World bank Group 2021

- **Tourism and travel related services: accommodations, F&B, MICE venue, inbound tour operator.**
- **Transportation services: Air, Marine and Land.**
- **Construction and related engineering services.**
- **Health and social services.**
- **Education services.**

