

GROWING TOURISM TO 2030

Enhancing a National Identity



Timor-Leste's Tourism Policy presents 5 overarching themes through which tourism should be positioned:

1

PRIORITY

2

PROSPERITY

3

PROTECTION

4

PARTNERSHIP

5

PEOPLE

Headline goals of the Tourism Policy are that by 2030 tourism will:

directly employ
15,000
workers



welcome
200,000
international
tourists annually



earn the country
USD150
million
in revenues



Tourism Supply

Based on existing flight routes, current flights can accommodate approximately **390,000** passengers per year

Maximum passenger capacity of Dili International Airport is approximately **766,500** passengers per year

Road networks to key attractions are in progress. To increase demand, key attractions and activities need to be developed in Maubisse, Balibo, Baucau, Com and Jaco Island.

fauna trekking forests flora
 whales coffee **NATURE** waterfalls
 diving **Attractions** Portuguese fortresses
MARINE **and** **ADVENTURE** caves
 marine diversity mountains
 ocean **Activities** monuments
 snorkelling **CULTURE** churches
 archaeological resistance
 museums religious
 historical

Awareness

Private sector companies in the tourism supply chain say that a HUMAN RESOURCE deficiency is the main challenge they face. This includes:

motivation
 initiative responsibility
 hospitality skills rigor
 behavior punctuality

Currently **5,000** people are employed by the tourist economy



Tourism Demand

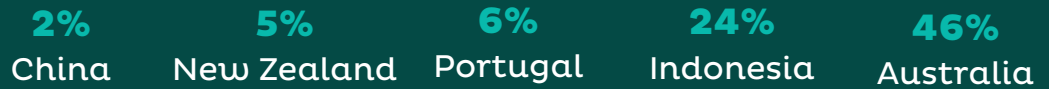


TOTAL VISITORS (% BY MARKET)



- Indonesia
- Australia
- Portugal
- China
- Philippines

LEISURE TRAVELERS



2017

73,837 arrivals were issued **Class 1 Tourist Visas**



2017

36,975 tourist visa recipients traveled for leisure **USD\$24.6 million**



2017

11,075 leisure travelers were holiday-makers **USD\$12.6 million**



Median spend per **holiday-maker** per trip **USD\$1,135**



Median trip length to Timor-Leste **holiday-maker** **3 nights**

4509 tourists

5 cruise ships

2032 shore excursions

US\$290,760 total passenger spend



2017



Class 1 Tourist Visas

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|-----------------------|--------|--------|--------|--------|--------|--------|--------|
| Class 1 Tourist Visas | 36,209 | 34,902 | 44,146 | 48,986 | 61,037 | 71,680 | 73,837 |

Holiday Makers (estimated)

| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|----------------------------|-------|-------|-------|-------|-------|-------|--------|
| Holiday Makers (estimated) | 2,535 | 2,443 | 3,090 | 3,429 | 5,213 | 8,437 | 11,075 |

* Holiday-makers are leisure travelers, who visited Timor-Leste for the primary purpose of holiday

Tourism Partnerships

Asosiasaun Turizmu Koleku Mahanak Ataúro (ATKOMA)

Objective
increase employment and revenue from tourism for the communities of Ataúro, while at the same time protecting the environment and promoting local culture

Activities

- > Destination marketing
- > Tourism training and mentoring
- > Research, planning, development and advocacy

Ataúro



Hotel Owners of Timor-Leste (HOTL)

Objective
Encourage and support the growth of member hotel

Activities

- > Tourism Marketing
- > Improved access and connectivity to Timor-Leste
- > Shared data analysis
- > Hospitality training opportunities

Timor Leste



Timor-Leste Coffee Association (ACTL)

Objective
Revitalize the Timor-Leste coffee farm sector

Activities

- > serve as the unified source for industry standards, industry advocacy, media representation, and international brand development for Timorese coffee
- > Offer capacity development and best practice training for farmers and other members of the industry

Timor Leste

