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# TOURISM PRODUCT DEVELOPMENT METHODOLOGY A GUIDE FOR PRACTITIONERS



# **TOURISM PRODUCT DEVELOPMENT METHODOLOGY**

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## **A GUIDE FOR PRACTITIONERS**

Produced by the United States Agency for International Development (USAID)  
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## LIST OF ACRONYMS

|           |  |
|-----------|--|
| ADB       | Asian Development Bank                             |
| ASTRABEKA | Association Tourism Ramelau Blehitu and Kablake    |
| ATKOMA    | Asosiasaun Turizmu Koleku Mahanak Atauro           |
| ATM-TL    | Asosiasaun Turizmu Maritima Timor Leste            |
| ATR-TL    | Asosiasaun Turizmu Religioso Timor Leste           |
| DIT       | Dili Institute of Technology                       |
| GOTL      | Government of Timor-Leste                          |
| IOB       | Institute of Business                              |
| MAF       | Ministry of Agriculture and Fisheries              |
| MTCI      | Ministry of Tourism, Commerce, and Industry        |
| SEAC      | Secretary of State of Art and Culture              |
| SOE       | Secretary of State for the Environment             |
| TFA       | Tourism for All Project                            |
| TAM       | Tourism Asset Mapping                              |
| UNWTO     | United Nations World Tourism Organization          |
| USAID     | United States Agency for International Development |

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# INTRODUCTION

## Background

To expand and improve Timor-Leste's tourism industry with an inclusive and sustainable approach, the United States Agency for International Development's (USAID) Tourism For All program works towards the following:

- Facilitating private sector investment and co-creation by working with government to establish incentives and obligations that are more private sector-friendly
- Promoting steady and sustainable tourism growth
- Safeguarding the environment and social characteristics of Timor-Leste's local communities.
- Creating inclusive tourism by improving industry governance and promoting sustainable investment, therefore improving, and increasing employment in the tourism workforce.

In March 2017, the Government of Timor-Leste (GOTL) approved a National Tourism Policy, titled Growing Tourism to 2030-Creating a Sense of National Identity. Promoting a vision that by 2030 the country will have a vibrant tourism sector that makes a significant contribution economically, socially, and environmentally. The tourism policy posits a five-pronged approach to sector development in the country: Priority, Prosperity, Protection, Partnership and People. Also key to tourism development are five different tourism niches identified in the Timor-Leste Strategic Development Plan 2011-2030, including:

- Eco and marine,
- Historical
- Cultural
- Adventure and sports
- Religious and pilgrimage
- Conference and convention.

From 2018, the Tourism For All project has worked with local communities in its geographic focus areas of Atauro, Dili and Mt. Ramelau to encourage the development of tourism products and experiences within these niches to drive growth in the tourism sector. Project activities have stimulated public and private cooperation to market Timor-Leste as an "off-the-beaten-path" destination for adventure travelers and eco-tourists with the ultimate goal of boosting tourist arrivals to 200,000 annually by 2030, increasing employment in tourism to 15,000 jobs and generating US\$150 million in annual tourism revenues. This can only be achieved through improved sector coordination across government, industry, development partners and civil society.

A first important step in tourism development is sufficient offering tourism products and experiences (supply-side) to keep tourists entertained during their visit to Timor-Leste. These products and experiences should also feature prominently in the country's destination marketing (demand-side).

There are myriad opportunities to further develop Timor-Leste's tourism supply using the available cultural and natural assets of communities across the country. In order to tap into this vast potential, it is important to have a methodology in place to guide tourism companies and communities on how to develop tourism experiences.

## Objective of this document

This document has two objectives:

- I. Provide a guide on tourism product development for tourism value chain actors such as tour operators, tourism associations, universities, training centers, and the public sector.

2. Share experiences of tour product development in Timor-Leste through a series of case studies.

To accomplish these objectives, the document defines tourism products and introduces a methodology for tourism product development including a step-by-step guide for bringing a tourism product to market. The document also includes a case studies of successful tourism product development in Timor-Leste.

## DEFINING TOURISM PRODUCT AND TOURISM PRODUCT DEVELOPMENT

### Tourism Product

The United Nations World Tourism Organization (UNWTO) defines a Tourism Product as including natural or man-made attractions, hotels and resorts, restaurants/food, theaters, activities, festivals and events (Gutierrez et al., 2005). In other words, a tour product comprises the sites, services, and resources that attract tourists to a destination (Twining-Ward et al., 2018).

The quality of a destination's tourism products, and their alignment with market demand, has a significant impact on the competitiveness and sustainability of the destination. Enhancing the quality of tourism products improves visitor yield (spending per visitor), protects the destination's assets, and boosts the overall economic impact from tourism (Twining-Ward et al., 2018).

Tourism products are made up of three factors (Handbook on Tourism Product Development, 2011):

1. Experiential – festivals, activities, community, event, dining and entertainment, shopping, safety, customer service.
2. Emotional – human, cultural and historic resources, hospitality.
3. Physical – infrastructure, natural resources, accommodation, restaurants

### Tourism Product Development

Tourism Product Development is a process whereby the assets of a particular destination are molded to meet the needs of national and international customers (*Handbook on Tourism Product Development*, 2011). The purpose of product development is to enhance the quality of tourism experiences by creating tourism routes, new attractions, and improving interpretation to increase supply to meet demand.

Tourism product development is a key element of the Timor-Leste Tourism Policy and Strategy. This element of tourism development is in the form of supply-side interventions, such as infrastructure, enterprise development, investment, and tour experiences. Understanding the dynamics between supply and demand is critical to any national effort to develop tourism and corresponding products. The following formula is a useful reference for tourism product development:

$$(\text{Potential Tourism Demand}) - (\text{Existing Supply}) = (\text{Gaps})$$

One should never assume that 'if you build it, they will come'. Rather the thinking should be 'let's build what they want'. This requires a strategic approach to the implementation of tourism product development in destinations like Timor-Leste.

According to the Timor-Leste National Tourism Policy and market assessments conducted by leading international tourism consultancies, Timor-Leste has a competitive advantage in marine tourism. This key niche includes activities such as diving, snorkeling, and cetacean observation. There is clear and undeniable potential demand for marine tourism in Timor-Leste. However, the country has not

developed the essential tourism supply (i.e., infrastructure and services) to meet the demand for marine tourism, indicating a gap between demand and supply.

Through this sort of a gap-analysis, many opportunities arise that should be considered within an overall tourism development strategy to ensure the investments that are being made are responsive to market demand, which is rapidly changing and evolving in the post-COVID pandemic landscape.

There are some basic motives for tourists to visit a place, including: physical, cultural, status/prestige and interpersonal. Tourists can be motivated by one or all of these factors. Table 1 provides a summary of these demand motives which should be considered when developing tourism supply:

Table 1: Tourist Demand Motives (Goeldner et al., 1994)

| Basic Motivators       | Description   |
|------------------------|---|
| <b>Physical</b>        | Concerned with individual physical health and well-being. Involves physical relaxation and rest, sporting activities, medical care or treatment   |
| <b>Cultural</b>        | Desire to experience other cultures, people, traditions, lifestyles, art, and music etc. They are interested in cultural heritage and historical sites, dance, music and theatre performances, art galleries, museums and exhibitions, religious and worship sites, and ethnic traditions |
| <b>Interpersonal</b>   | Desires meeting new people, visiting friends or relatives, and to seek new and different experiences. Travel is an escape from routine relationships with friends or neighbors or the home environment  |
| <b>Status/Prestige</b> | These include a desire for continuation of education (i.e., personal development, ego enhancement and sensual indulgence). Such motivators are seen to be concerned with the desire for recognition and attention from others, to boost the personal ego.                                 |

From this information, it can be concluded that when building tourism supply, it is important to ensure that these key motivators are considered to ensure demand generation and customer satisfaction. In addition, a country must identify where it has a comparative advantage against its competitors.

At the request of the Government of Timor-Leste, the World Bank Group produced a *Baseline Supply and Demand Analysis Report* to identify Timor-Leste's wealth of tourism assets and how they can be linked to global tourism demand trends. The report highlights that the core of Timor-Leste's assets is natural, including: marine, coastal, and mountains. Its cultural and heritage assets could further set a compelling story to create a unique offering to tourists. For Timor-Leste to achieve its tourism goals, there are various opportunities for Timor-Leste to improve its tourism offering. The areas of opportunity are: addressing coordination failures between public and private sector stakeholders in the tourism industry, improving local and international connectivity and access, improving the overall tourism climate through promotion and creating demand for the private sector to grow and develop, and finally, developing basic tourism facilities to benefit local, domestic, and international travellers. The study is a critical first step in the strategic development of tourism in the country and a must read for any tourism practitioner.<sup>1</sup>

## TOURISM PRODUCT DEVELOPMENT METHODOLOGY

USAID's Tourism For All project has supported tourism product development along the value chain in the municipalities Dili, Ainaro and Ataúro. These products include visits of cultural sites such as sacred houses, faith-based places of worship or the Nicolau Lobatu Statue in Aisirimau, natural sites, such as Dokomali Waterfall or marine environments of Ataúro island. Through these experiences, a

<sup>1</sup> English: [www.timorleste.tl/documents/baseline-supply-and-demand-analysis-with-consumer-perspective/](http://www.timorleste.tl/documents/baseline-supply-and-demand-analysis-with-consumer-perspective/)  
Tetum: [www.timorleste.tl/documents/analize-linha-base-ba-oferta-no-demanda-ho-prespetiva-komsumidor-nian/](http://www.timorleste.tl/documents/analize-linha-base-ba-oferta-no-demanda-ho-prespetiva-komsumidor-nian/)

methodology, customized to the Timor-Leste context and considering international good practice, has emerged, which can inform future tour and experience development in the country. This methodology can serve as a valuable resource for relevant stakeholders and institutions as Timor-Leste continues to expand its tourism product offering to attract niche, domestic and international markets.

The methodology has three phases, each with three steps that help streamline the development process for tour operators and communities in Timor-Leste to create successful products and experiences. Figure 1 illustrates the three phases and summarizes the steps.



Figure 1: The Three Phases of the Tourism Product Development

The following will describe each of the tourism product development phases and the subsequent steps in more detail along with examples from USAID's Tourism For All project.

## Phase 1: Product-Market Match

The initial phase of tourism product development consists of analyzing tourism demand and the supply of available assets to identify which assets have the greatest potential to meet demand.

### STEP 1: MARKET ASSESSMENT (DEMAND ANALYSIS)

In order to determine what products to develop, a tourism product developer will need to understand who is visiting the destination and why (Gutierrez et al., 2005). It is important to consider market segments to ensure the product is developed in a way that meets what customers want. Market segments can also provide guidance on how to market the product later in the process (product marketing discussed in Phase 3).

When building a market segment, it is helpful to consider the following (Gutierrez et al., 2005):

- **Demographics:** What is the home country, age, gender, and level of income of tourists? Will domestic tourists and resident expatriates partake in the activity?
- **Travel Motivations:** What is their purpose for traveling? What emotional needs do they seek to fulfill? See Table 1 above.

- Travel Patterns: Are they traveling as an individual? Are they traveling as a part of a group? How long will they travel? Where are they traveling from? Where will they travel to next?
- Interests: What do they want to see? What do they want to do? What do they want to eat/drink? What products and services do they want?
- Spending patterns: How much money do they have to spend per day? What do they want to spend money on?

By the end of the market assessment, one will have a profile in mind of a specific type of person who is likely to travel to the destination and be interested in a product offering.

Further information on market assessment and determining the market segment can be gathered from various sources. The e-library on [www.timorleste.tl](http://www.timorleste.tl) contains excellent research and resources related to tourism demand for Timor-Leste and is a great place to start building market segments. As suggested in the previous section, the World Bank's *Baseline Supply and Demand Analysis Report* is a good starting point.

Table 2 provides an example of a market segment analysis developed primarily from data found in the that Report concerning Timor-Leste.

Table 2: Example Market Segment: Australian Adventure Travelers

| Demographics  | Travel Motivations  | Travel Patterns   | Interests:   | Spending Patterns  |
|---|---|---|--|--|
| <ul style="list-style-type: none"> <li>• Australian Adventure Travelers</li> <li>• Age 30-49</li> </ul> | <ul style="list-style-type: none"> <li>• Discovery</li> <li>• Pristine, wild, untouched landscapes</li> </ul> | <ul style="list-style-type: none"> <li>• Package tours</li> <li>• Like to move around, no more than two/three nights per destination</li> <li>• Total trip: 10-20 Days</li> </ul> | <ul style="list-style-type: none"> <li>• Water-based adventure/Hiking Trekking/ walking</li> </ul> | <ul style="list-style-type: none"> <li>• ~154 Dollars per day</li> <li>• Food, drinks and accommodation are top spend areas</li> </ul> |

With a market segment (s) identified, the next step in the process is to consider the assets available which could be developed into a product.

## STEP 2: ASSET ASSESSMENT (SUPPLY ANALYSIS)

When designing a tourism product, one should consider “what makes this product unique?” Focusing on products and experiences that have qualities that are unique helps to differentiate them and make them more competitive against other products locally and regionally. Market demand studies have shown that Timor-Leste has a competitive advantage in developing the following assets into products:

### Marine Assets

Timor-Leste has a unique and rich marine biodiversity (see Figure 2), and coastal ecosystems that are increasingly attracting local and international attention. Examples of Marine tourism activities include diving, snorkeling, whale and dolphin watching, sailing and other forms of water-based adventure. USAID's Tourism For All, in partnership with the Assosiasaun Turizmu Maritima Timor-Leste (ATM-TL) provides a multi-stakeholder forum to promote and assist sustainable development of the marine tourism sector in Timor-Leste.



Figure 2: Marine Life in Ataúro. Photo Credit: Mayumi Kubota



### Natural Assets (Land Based)

Natural landscapes are original resources that exist without any acts of people. Natural tourism assets may include activities such as hiking and trekking, walking, mountain biking, birdwatching, rock climbing and other forms of land-based adventure. Some examples of natural tourism products in Timor-Leste include the Dokomali Waterfall, Mt. Manucoco on Ataúro island, and Mt. Kakusa among others – many of which remain unexplored.

### Cultural Assets

Cultural tourism has been defined by the World Tourism Organization or UNWTO as movements of persons for essentially cultural motivations, such as study tours, performing arts and cultural tours, travel to festivals and other cultural events, visits to sites and monuments, travel to study nature, folklore or art, and pilgrimages. These movements satisfy the human need for diversity, tending to raise the cultural level of the individual and giving rise to new knowledge, experience, and encounters (Richards, 2003). Timor-Leste has unique cultural values that can contribute to tourism product development. Sacred houses (see Figure 3), traditional dances, traditional forms of worship, and traditions like Tebe-tebe and Sakal are examples of Timor-Leste's rich cultural heritage that is attractive to visitors who want to experience local culture. Cultural tourism could also take the form of film festivals, art exhibitions or other events.



Figure 3: Sacred House in Lospalos. Photo Credit: Government of Timor-Leste

### Historical Assets

Historical assets focus on distinctive places of historical significance, such as history museums, iconic sites and buildings, and monuments. Examples of historical tourism in Timor-Leste are the Nicolau Lobato statue, Portuguese architecture such as Pouzada Maubesse.

### Religious Assets

Religious tourism refers to spiritual, sacred, or faith-based tourism. Local religious assets – many of them based on the majority Catholic following - such as the Cristo Rei statue and Pura Template in Taibesse in Dili or the Saint Marry statue in Mt. Ramelau (see Figure 4) are examples of key attractions that can be the focus of tourism product development. USAID's Tourism For All project supported the establishment of the Faith-Based Tourism Association (Asosiasaun Turizmu Relijiozu Timor-Leste-ATRTL) to help grow this niche tourism market in the country.



Figure 4: Mother Mary Statue on top of Mt. Ramelau. Photo Credit: Racom Maubessi

### Resistance Assets

Resistance assets refers to places where Timor-Leste liberation fighters, such as Xanana Gusmao, Taur Matan Ruak, and their followers, engaged in battles in resistance against the Indonesian military occupation and Portuguese colonialism. These places have served as attractions for both local and international tourists over the past twenty years of the country's independence.

## STEP 3: PRODUCT-MARKET MATCH EVALUATION

Once a list of potential tourism products has been identified, the final step in Phase I is to identify which products have the most potential to meet the demands of the identified market segment(s). An excellent tool to use is an Asset Rating System. The following Tourism Asset Rating System has been adapted from work on Tourism Asset Mapping (TAM) conducted under an Asian Development Bank (ADB) technical assistance project "Cross-Border Trade and Cooperation between Indonesia and

Timor-Leste”. Each asset is ranked in terms of its overall appeal to each market segment, on six characteristics based on a scale from one to five. Table 3 provides an overview of the characteristics and scoring criteria.<sup>2</sup>

Table 3: Tourism Asset Rating System (Adapted from Tourism Asset Mapping in Noakes et al., 2021)

| Characteristic   | Scoring Criteria   |
|--|--|
| <b>Draw</b> - The distance that a typical visitor is likely to travel to visit the asset.  | 1. The attraction is of local interest only and will not draw visitors   |
|  | 2. Although the attraction may not draw many visitors, it may serve as a short stop on the way to somewhere else |
|  | 3. A small number of visitors from outside of the area may be drawn to the attraction                            |
|  | 4. As many as a third of the visitors are from outside of the area.  |
|  | 5. The attraction is of great interest to visitors from outside of the area.                                     |
| <b>Access</b> - The degree of difficulty in access by road, marine services or air service.                                      | 1. There is no road, marine or air service access  |
|  | 2. There is limited, relatively underdeveloped road, marine or air service access                                |
|  | 3. There are moderate and semi-developed conditions for road, marine or air access                               |
|  | 4. There are suitable conditions for access by road, marine or air access  |
|  | 5. There are very good and easy conditions for road, marine or air service access                                |
| <b>Duration</b> - The length of time a typical visitor will want to remain at the asset  | 1. The typical visitor who stops will remain only a few minutes  |
|  | 2. A visitor may spend an hour or two at the attraction  |
|  | 3. Visits to the site can last up to a half day and often include at least one meal or snack                     |
|  | 4. The attraction is worth stopping for an entire day, with one or more meals                                    |
|  | 5. Visitors will spend more than one day at the attraction, staying overnight and eat several meals              |
| <b>Development</b> - Orientation, interpretation, facilities, customer services & other conditions impacting visitor experience. | 1. The site suffers from multiple shortcomings that may frustrate visitors                                       |
|  | 2. One or two issues detract from the experience   |
|  | 3. The site is average, meeting expectations but not exceeding them  |
|  | 4. Development is above average and leads to a positive visitor experience                                       |
|  | 5. The attraction delivers an exceptional experience on all levels   |
| <b>Competitive Differentiation</b> - The degree to which the asset is unique or stands out from its competitors.                 | 1. Just about every place has a similar attraction, and of comparable quality                                    |
|  | 2. The attraction may be less common or those offered elsewhere may be of a lower quality                        |
|  | 3. The attraction is not very common and at least equal in quality to its competitors                            |
|  | 4. Few competitors exist and the attraction is in the top third as far as quality is concerned                   |
|  | 5. The attraction is truly unique and stands out among the best of its competitors                               |
| <b>Duplication</b> - The likelihood that a visitor will return for additional visits to the attraction.                          | 1. There is no reason most visitors will want to return a second time  |
|  | 2. If it is not out of the way, some visitors may consider it worth a short detour                               |
|  | 3. A visitor might come back every few years   |
|  | 4. Visitors may consider the attraction worth a stop every year or two   |
|  | 5. Visitors will definitely return time and again, even in the same year   |

Table 4 provides an example of a product-market matching evaluation for an imaginary Australian adventure traveler.

<sup>2</sup> See: [www.timorleste.tl/documents/tourism-asset-mapping-report/](http://www.timorleste.tl/documents/tourism-asset-mapping-report/)

Table 4: Example of Product-Market Matching Evaluation: Australian Traveler (adapted from Tourism Asset Mapping in Noakes et. al., 2021)

| Asset                      | Draw | Access | Duration | Development | Differentiation | Duplication | Total |
|----------------------------|------|--------|----------|-------------|-----------------|-------------|-------|
| Atauro Island              | 5    | 3      | 5        | 2           | 4               | 3           | 22    |
| Cristio Rei                | 4    | 5      | 3        | 2           | 4               | 3           | 21    |
| Timorese Resistance Museum | 4    | 5      | 2        | 4           | 4               | 2           | 21    |
| Alola Esperansa Workshop   | 4    | 4      | 2        | 4           | 3               | 4           | 21    |
| Chega! Exhibition          | 3    | 5      | 2        | 4           | 4               | 2           | 20    |
| Mt. Ramelau                | 5    | 2      | 5        | 1           | 4               | 3           | 20    |
| Jaco Island                | 4    | 2      | 5        | 2           | 4               | 2           | 19    |
| Tais Market                | 4    | 5      | 2        | 2           | 2               | 3           | 18    |
| Dokomali Waterfall         | 2    | 3      | 3        | 3           | 4               | 2           | 17    |

Developing a tour package that features more than one product, including more high scoring products, will make the package more attractive to the market segment. Other factors that may increase tourist satisfaction include safety, facilities/accommodation, food and quality of tour guides.

### Engaging Communities in Asset Mapping

Based on the learning experiences in Dokomali Waterfall in Ainaro, Mt. Manucoco in Atauro, and Camea Lenuk Hun in Dili, involving communities in asset mapping process is useful for:

- Introducing assets as economic opportunities to communities. For the Dokomali Waterfall product, consultations with community leaders resulted in the establishment of a tourism working group that mapped out the potential of the natural asset as a tourism product/experience.
- Empowering communities to participate in tourism product development and integrate them into the tourism market: For the Camea Lenuk Hun product, the community participated actively in its development. This included local and cultural leaders deciding on cultural activities that could be showcased and women groups deciding on which traditional food to offer to visitors.
- Directly engaging communities in the process of tour product development and operation: On Atauro Island, community members serve as guides for hiking, offer their boats for snorkeling trips or their Tuk Tuks for tours. This makes community members an invaluable resource for creating and operating tourism products/experiences utilizing the island's local assets.

## Phase II: Identify Product Development Needs and Opportunities

Once products have been identified as having potential for product development based on product-market match ranking, tourism practitioners can move to the next phase of identifying needs and opportunities.

### STEP I: IDENTIFY PRODUCT DEVELOPMENT NEEDS

Product development needs can often be broken down into several categories. The needs of any potential product could fall into one or more of the following:

1. Infrastructure: Buildings, trails, roads, signage
2. Training: Guides, food services, lodging service, customer service, transportation
3. Investment: New facilities and infrastructure, equipment, training programs, personnel

4. Support: Political, institutional, marketing & sales, etc.

#### **Sample Product Development Needs: Dokomali Waterfall Tour Package**

USAID's Tourism For All Project supported the development of the Dokomali Waterfall Tour Package. In the course of the product development, the following needs were identified:

##### Infrastructure

- Foot path and stairs for safe access to the waterfall
- Rehabilitation of the waterfall swimming pool
- Establishment of rest stops and photo spots
- Directional signage

##### Training

- Tour guiding
- Communications
- Basic financial management
- Marketing and promotion
- Culinary and hospitality

##### Support

- Establishment of tourism working group
- Local regulation that enables tour product and site management
- Regulation on entrance fees
- Digital marketing and promotion platforms
- Partnership between community and tour operators

The identified needs inform step 2 of phase 2 – the required resources to cover the above stated needs.

#### **STEP 2: DEFINE RESOURCES**

Tourism products tend to have multiple stakeholders. Creating a list of key actors who can provide support and facilitate the tourism value chain is a useful endeavor. The following outlines details on typical stakeholders that need to be considered in tourism product development in Timor-Leste.

##### **Government**

Timor-Leste's government supports and coordinates tourism activities through its Ministry of Tourism Commerce and Industry (MTCI), Ministry of Agriculture and Fishery (MAF), Secretary of State of Art and Culture (SEAC), Secretary of State for the Environment (SOE), and local authorities.

- a. MTCI is the lead government entity responsible for Timor-Leste's tourism sector. It plays an integral role in facilitating tourism sector development and management at the national and municipal levels.
- b. MAF is responsible for the development and implementation of protected area management plans. Protected areas are often tourism destinations due to their natural assets. MAF coordinates with other stakeholders to ensure that tourism in protected areas is balanced with conservation needs, including sustainable financing approaches.
- c. SEAC is responsible for Intangible Tourism Cultural Heritage Safeguarding. Particularly sacred houses, traditional and cultural events, Tais, and other heritage products.
- d. SOE is responsible for environmental policy, including protecting forests, controlling ecological activities, and ensuring that tourism does not adversely impact the environment

- e. Local authorities, such as Municipality Presidents, are important in the regulated implementation of tourism products in their areas of responsibility. They are also key in addressing concerns voiced out by local communities about potential negative impacts of tourism.

### **Community Leaders**

Local leaders such as cultural or youth leaders often hold a great deal of responsibility in communities. Their participation in tourism product development is critical in helping community acceptance, awareness and support to tourism development in their areas of influence.

- Cultural leaders, faith-based leaders or a trusted elder – Need to be engaged particularly for traditional matters and sacred heritage.
- Youth leaders – Can be pioneers of tourism product/experience development. They should participate in community meetings, help conducting tourist assessments, and be trained to lead tours and facilitate familiarization trips/market testing. They are often more conversant in the English language, which is key for interacting with international tourists.

### **Tourism Associations**

USAID's Tourism For All project supported the establishment and strengthening of several tourism associations in Timor Leste such Asosiasaun Turizmu Ramealu Blehetu Kablaki (ASTRABEKA) in Hatobuilico, Asosiasaun Turizmu Koleku Mahanak (ATKOMA) in Atauro, Asosiasaun Turizmu Maritima Timor Leste (ATM-TL) in Dili and Asosiasaun Turizmu Religioso Timor Leste (ATR-TL). These associations provide key support for tourism activities in the locations they are established and need to be engaged in tourism product development and marketing. They are critical to destination stewardship given their wide-reaching influence with government, industry and civil society.

### **Faith Leaders**

The role of the Catholic Church is vital in Timor-Leste's society. In addition, other religious groups such as Muslims, Protestants, Buddhists, and Confucians are important institutions that shape Timor Leste's religious landscape. Faith leaders representing their religion are key in supporting religious tourism and related tourism products. Often times they are trusted community leaders with notable influence on local people.

### **Tour Operators**

A tour operator is a business that organizes the services provided to the tourist, such as accommodation, meals, sightseeing and transportation. They promote and sell packages of products either directly to the public or through travel agents. They are critical for coordinating the implementation of tour products and experiences.

### **Training & Higher Education Institutions**

These institutions provide knowledge and skills needed for successful tourism product development such as marketing, effective communication, tour guiding principles, hospitality, customer service and basic financial management training.

The list below includes several institutions that participates in tour product development, particularly familiarization trips/market testing:

- UNTL (Universidade Nasional Timor Loro-Sae) Tourism Department
- IOB (Institute of Business) Tourism Department
- DIT (Dili Institute of Technology) Tourism Department
- Institute of Cannosa, Tourism Department
- UNITAL (Universidade Oriental Timor Lorosa'e) Tourism Department



## Media and Digital Marketing

In order to successfully bring a tour product to the market, promotion is paramount. Journalists and other members of the media can take part in familiarization trips and other market testing activities to begin the process of promoting the product/experience to the public through publication in print media and features on television/YouTube. Some examples of key media outlets in Timor-Leste are:

- Local social media content creators
- Travel writers
- TV educational programs
- Timor Post
- STL, Suara Timor Lorosae
- Lolowari online news
- Naunil online news
- LUSA
- GoTimor! mobile application

Now that needs and stakeholders have been identified in the previous two steps, this information can be used to match these needs with the resources needed to develop a tourism product.

### STEP 3: ANALYZE NEEDS AND OPPORTUNITIES

The next step involves matching needs, with potential resources. To examine what a product needs to be successful, four questions should be answered (Gutierrez et al., 2005):

1. What makes the product unique, competitive?
2. What are the barriers and challenges?
3. What are the product development needs (infrastructure, training, investment, support)?
4. How can partners contribute to product development?

Table 5 provides an example of listing the needs and opportunities for the Dokomali waterfall product development.

Table 5: Needs and Opportunities Analysis (adapted from Gutierrez et al., 2005)

| Product             | Strengths/<br>Opportunities  | Weaknesses/<br>Threats                                    | Product Development<br>Needs   | Potential Partner<br>Roles   |
|---------------------|--|---|--|--|
| •Dokomali Waterfall | •Unique natural asset<br>•Combination of natural landscape and specific asset (waterfall). | •No regulation<br>•Poor infrastructure<br>•Lack of access | •Regulation.<br>•Capacity development for tour guides<br>•Basic infrastructure development | •Government to support regulations and funding<br>•Tourism association to market product |

Once the specific resources available to meet the product development needs have been identified, the third phase can commence.

## Phase III: Develop an Action Plan

Phase III is the final phase in the process and focuses on the final steps that are needed to bring a tourism product/experience to market. The first step is formulating an action plan, the second step is market testing and the third and final step is marketing and promotion.

### STEP I: FORMULATE A PLAN

Action plans outline the specific tasks, in chronological order, that will be completed to develop a product and get it ready to market. The action plan should list each action along with details of who is responsible, how the action is to be implemented, what budget will be needed, and over what time frame will the actions be undertaken. The desired outcome or result should also be stated (World

Tourism Organization & European Travel Commission, 2011).

According to the UN World Tourism Organization and European Travel Commission actions plans need to define the following:

- **Action:** What is the specific task that must be completed?
- **Responsible:** Who is responsible for completing the task, who is accountable?
- **Support:** Who is providing additional support to complete the task?
- **Resources Required:** What money, time, political support and so on are needed?
- **Outcome/Result:** What is the result of the completed task?

Table 6 provides an example of an action plan for two actions required in the larger process of developing a Half-Day Walking Tour through Dili:

Table 6: Example Action Plan: Half-Day Walking Tour through Dili

| Action   | Responsible | Support | Resources Required | Outcomes/Results                                       |
|--|-------------|---------|--------------------|--|
| Train guides for Dili Half-Day Walking Tour        | Jacob       | Angelo  | 2 weeks, \$100     | 2 trained guides to lead tourists through the activity |
| Develop a route for the Dili Half-Day Walking Tour | Angelo      | Maria   | 1 week             | Directions of the tour route recorded on a map         |

Once the action plan has been put in motion, and all the activities of the various stakeholders have been completed, the product is ready to be marketed to its key market segment.

## STEP 2: MARKET TESTING

Before a product is launched, it must first be tested to make sure that it is market ready. A great way to accomplish this is to have one or more test trips to ensure that the product/experience meets demand and that there are no glaring operational hiccups. Trusted friends, or perhaps real tourists who try the product for free or at a discounted price can take part in market testing. Those who participate in market testing must do so with the understanding that they must provide detailed feedback and suggestions on improving the activity for future travelers. Annex 1 provides a sample survey template that can be tailored to generate thorough feedback for a specific tourism product. A time-tested way to accomplish this is through a familiarization trip (aka “FAM trip”). The fundamental objective of a FAM trip is to bring together those who will have the ability to promote or sell the trip to the key market segment(s) identified in the first phase of product development. This could take the form of tourism influencers, such as YouTube video content creators, tourism blog writers, tour operators, hotel staff, travel agents, media, and university students to participate in a product market test. These stakeholders will learn about the product experiences to test and observe whether the product is ready to enter the market, or it needs improvement.

When a tour is introduced to the media, it is important to ensure that the product will go smoothly and the product has been successfully tested internally beforehand. Otherwise, negative media reports can seriously jeopardize the potential of a tourism product/experience.

## STEP 3: MARKETING AND PROMOTION

Because resources are often limited, it is generally better to focus on the most receptive audiences first (Stange et al., 2011). When beginning to develop a marketing strategy, it is helpful to revisit the details of the market segment determined back in Phase I, Step 1.

A tour operator can create the “marketing mix” to combine the best marketing elements in order to promote the product with the best return on investment (Stange et al., 2011). An effective method to develop a successful marketing and promotion strategy is the “Four Ps Method”. USAID’s Tourism Destination Management Handbook outlines the “Four Ps” as follows (Stange et al., 2011):

- **Product.** What experiences and services should be packaged for target markets? Product development and packaging includes product-market matching, product mixes, product life cycle, product packaging, and new product development.
- **Price.** Which price point appeals to target markets? Can the right balance between price and volume be achieved?
- **Place.** What distribution channels are most appropriate to distribute product to target markets? The destination place (distribution) strategy should consider changes in the traditional travel channels, the emergence of the internet and other new media and the role of low-cost and scheduled airlines.
- **Promotion.** What is the best mix of promotional techniques to reach target markets?

Common marketing tools used by DMOs, include the following (Stange et al., 2011):

- **Brochures.** Leaflets, flyers, or other descriptive circulars; these are particularly useful for tourism and service businesses (*Annex 2.1 shows sample brochures used for marketing tourism products in Timor-Leste*)
- **Print media.** Newspapers, magazines, and specialty publications
- **Broadcast media.** Radio can be targeted to specific markets; cable television can likewise target specific markets; network stations can be very expensive.
- **Online advertising.** Paying for visibility on other websites; these can be banner ads, sponsorship of other sites, purchasing key words and phrases (tags) for search engines.
- **Advertising specialties.** Items imprinted with the organization or destination logo and given to customers (calendars, caps, desk sets, pens, and gifts)
- **Direct mail.** Flyers, catalogues, brochures, and coupons.
- **Emailing.** Regular or infrequent mailings to email lists; these can be direct advertisements or online newsletters.
- **Events.** Showcasing the destination through themed parties, informational workshops, and performances of local culture
- **Public relations.** Free feature and news articles in the media and other publicity, usually secured by public relations specialists
- **Informal marketing/networking.** Activities such as public speaking or attending conferences and trade shows
- **Website.** A very effective way to describe products or services in depth for customers everywhere at all hours
- **Social media.** A way to increase word-of-mouth marketing by using online networks to share information about the destination

## CASE STUDIES

Below are examples of tourism product development. These products that have been developed with the assistance of USAID's Tourism For All project.

### Ataúro Island and Mt. Manucoco

#### Introduction

USAID assisted the Asosiasaun Turizmu Koleku Mahanak Ataúro (ATKOMA) to develop a collection of day and multi-day tours, including the *Hike to Manukoko Peak* experience (click [here](#) to see all tours on offer). Manukoko is the highest and most sacred mountain on the island. According to local tradition, a person has not truly visited Ataúro until they have climbed to the highest point of the island. This sacred mountain represents much for the sucos

of Ataúro, from the primary freshwater source on the island to the location of many legends and ancient traditions.



Figure 5: Tourist Map of Atauro Island

The full climb to Manukoko Ridge is approximately 995m above sea level. Hiking this mountain is a must for Ataúro's visitors who love trekking. Guided by locals, this hike features a number of memorable experiences, including enjoying the sunrise and the scenic view of the hills, bird watching, better understanding of the history of Ataúro's ancestry and villages, as well as rest stops to enjoy coconuts and yam. Due to the sacred nature of the site, hiking with a guide is required.

## Product-Market Matching

### Phase 1

- Step 1: Market Assessment
- Step 2: Asset Assessment
- Step 3: Product-Market Match Evaluation

In 2018, USAID worked with tourism industry and local community leaders to develop an Ataúro Island Sustainable Tourism Strategy. The purpose of the Sustainable Tourism Strategy was to define, through a consensus-oriented process, a road map for enhancing the competitiveness of Ataúro Island's tourism industry that will ensure the sustainability of the island's cultural and natural assets. The intent of the plan was to maximize and spread the benefits of tourism development throughout the island and to local communities.

The strategic planning process took place through interviews with tourism stakeholders and visitors. In addition, a visioning workshop was held in Vila in October 2018. These consultations were designed to facilitate discussions and consensus around answering four questions:

- **Where Are We Now?** – An analysis of the island’s current competitive position and major challenges and opportunities for enhancing that position.
- **Where Do We Want to Be?** A process for defining a consensus vision for sustainably transitioning the industry to maximizing local benefits and minimizing negative social and environmental impacts.
- **How Do We Get There?** Collaboration, operating, goals, strategies, objectives and preliminary action plans were drafted to provide a roadmap for achieving the vision. This road map details each step and public and private sector roles and responsibilities.
- **How Do We Know When We’ve Arrived?** This is the most critical question in any planning process. This phase of work identified indicators to measure results and track implementation progress.

It was generally agreed that tourism represents a significant opportunity to stimulate the economy of Ataúro through foreign exchange, investment, job creation and sector linkages. Tourism is already the main economic driver and employment generator on the island, but there is room for growth and enhanced prosperity for the businesses and community enterprises on the island.

Several guiding principles were identified including:

- **World-famous ecotourism destination**
- **Pristine**
- **Protected Area**
- **Low Impact Development**
- **Renewable energy**
- **Healthy Reefs**
- **Vibrant Communities**
- **Limited number of visitors**
- **Respectful visitors**
- **Excellent service**
- **Authentic cultural and natural experiences**
- **Tourism services delivered by the people of Ataúro**



## Leading to a 2030 Vision for the Island of Ataúro.

*In the year 2030, Ataúro Island will be a pristine protected area and world-famous ecotourism destination with low impact development, renewable energy, healthy reefs, and vibrant communities that welcome a limited number of respectful visitors who will enjoy excellent service and authentic cultural and natural experiences provided by the people of Ataúro.*

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In support of the vision, number of priorities and supporting strategies were agreed upon to help bolster tourism's contribution to the island's economy.



**Priority 1** - Assist the government to **prioritize** investments & policies needed to improve the



**Priority 2** - Enhance the **prosperity** of businesses & community enterprises



**Priority 3** - **Protect** natural and cultural resources



**Priority 4** - Strengthen destination **partnerships**



**Priority 5** - Provide training & business skills to the **people** of Ataúro

In relation to Priority 2, the following strategies were identified. These are all relevant to the development of tourism products and services.

- Develop new tourism experiences hosted by community enterprises
- Develop new day and multi-day packages that will be sold at the information center, online, and through accommodations and tour operators
- Update and print new destination brochures and maps
- Develop a Tourism Information & Conservation Center
- Update the Ataúro website and improve online marketing of the destination
- Host journalists, bloggers, and social media influencers to generate earned media
- Introduce and educate Timorese and International Tour Operators about the destination and new packages
- Assist community vendors at the Saturday Market in Beloi improve services and offerings to generate more income
- Assist homestays and other community businesses legally register become compliant, improve services, and marketing

- Facilitate linkages and quality of services between service providers to guarantee availability and consistency of services.
- Build up comprehensive, integrated and inclusive tour product planning
- Boosting the capacity and skill of youth in tour guiding, communications, marketing, and basic financial management.

The strategic process that the community of business, government and civil society leaders engaged set in motion the development of tours based on market demand and assets, including the *Hike to Manukoko Peak Experience*.

Using the Tourism Asset Rating System, Mt. Manucoco scores a high **25** based on the below listed considerations.

| Asset        | Draw | Access | Duration | Development | Differentiation | Duplication | Total     |
|--------------|------|--------|----------|-------------|-----------------|-------------|-----------|
| Mt. Manucoco | 5    | 3      | 4        | 3           | 5               | 4           | <b>25</b> |

- Draw – Manucoco is unique with natural scenic views across the island has a high level of tourism appeal
- Access – Getting to Ataúro Island is relatively easy with regular flights (MAF), speedboats (Compass) and ferries. One must hike to access the peak.
- Duration – From major resorts and guesthouses on Ataúro, it is a full day trip leaving early in the morning.
- Development –The hiking and walking path is underdeveloped and there is a degree of risk for the visitor. Traditional path maintenance, such as cleaning the path, rocks for stairs, trimming of trees and grass is being done by the community and ATKOMA.
- Differentiation – Mt. Manucoco with its unique landscapes and scenic views of the island and the mainland is a one of a kind experience.
- Duplication – Mt. Manucoco is not easily duplicated by any other experience in Timor-Leste and Indonesia's East Nusa Tenggara.

## Identify Needs and Opportunities

- Step 1: Identify Needs  
Step 2: Define Resources  
Step 3: Analyze Needs and Opportunities

### Phase 2

Visitors to Ataúro rarely experienced everything the island has to offer. A few of the accommodation providers offered a variety of activities for their guests to enjoy but they tend to be offered only when requested. The length of stay for the majority of visitors is typically limited to a few days. This brought to surface the need and opportunity to develop and offer day and multi-day packages as a means to help visitors understand, approach and appreciate the island.

As active marketing tools, these packages can be developed around a particular theme to attract visitors with special interests and increase their length of stay. These packages can be made available online, in the new tourism information center in Dili, and sold through the various accommodation providers located on the island and possibly even in Dili.

It was generally agreed that with the growing demand for authentic cultural and natural experiences, there was an opportunity for Ataúro to expand its visitor experience offerings to better incorporate its cultural and natural assets (such as Mt. Manucoco) while benefiting local communities. These communities, located throughout the island, are tasked with safeguarding the natural and cultural assets and they are best positioned to develop and offer new visitor experiences.

It was observed that the Saturday market in Beloi, is an important economic driver on the island. Pre-COVID, every Saturday, during the dry season, the Nakroma Ferry would arrive with hundreds of visitors from Dili who disembark and buy food, drinks, and handcrafts from community entrepreneurs that set up in the market. Through modest infrastructure enhancements, collection and management of waste, addition of music and cultural performances, and technical and financial assistance to local entrepreneurs additional spending from visitors and a better overall experience on the island could be garnered.

Ataúro's Sustainable Tourism Strategy, noted that when developed properly, Community-based Tourism or CBT can provide a model to ensure a more inclusive tourism destination and an improved visitor experience. CBT already existed on Ataúro and just needed additional support, marketing, and sales linkages to become profitable business enterprises. The Island is also home to several NGOs and working groups established including artisans and the locally managed marine protected areas, that are already organized and ready for support to develop and offer new tourism experiences.

ATKOMA, the Island's Destination Management and Marketing Organization would play an integral role in helping develop, market, and sell these community experiences. One of the actions of ATKOMA was to develop a trekking tour to Mt. Manucoco. It was recognized early on that trail infrastructure and local capacity for being a trekking guide were shortcomings in need of attention. Following a reconnaissance trip to survey the prospective tour, a short trail description was developed:

*From Vila, visitors will initially head up a steep road past the Cave of our Lady Mary. Near Maulaco, the trek will turn off on to a track climbing steeply upwards towards Manukoko. Eventually vegetation changes to forest. Towards the top, join the track from Anartutu and then head south-west, where you will still be in the forest until a narrow scrub-covered rocky ridge that you will climb in order to summit. You will enjoy the spectacular scenery and view of the island, snap plenty of photos, and then head back down. As you wind your way up the path, take note of the vegetation change, from dry and grassy to lush and tropical. Keep an eye out for a wide variety of colorful birds, some known only to the island of Timor—14 restricted-range bird species have been identified in this area by BirdLife*

International, including the endangered Timor Green Pigeon.

During this time, it was also determined that Ataúro needs to improve the quality of its service



Figure 6: Conceptual design, Atauro Visitor & Conservation Center

quality the tourists visiting the island, and to achieve this a tourism information center, sometimes referred to as a “welcome center” should be built. Ataúro lacks a one-stop, physical location from which travelers can connect to local businesses and services and understand everything to do on the island. A new information center will provide a welcoming environment for travelers to

congregate, learn about available tourism products and services in the region, and make reservations. In addition, the tourism information center can provide a space to generate revenue through the sale of tours, merchandise, and local handicrafts as well as capture and analyze important traveler information and statistics. The proposed information center would have a multiple pronged purpose: to provide information and reservation services to travelers; and to service local tourism suppliers and the greater community; to serve as a marine interpretation and conservation center showcasing the incredible diversity and richness of the marine life surrounding the island. It is proposed that ATKOMA would manage the information center to support the organization’s mission and revenue generation strategies. A conceptual design was produced by USAID and handed over to the Government of Timor-Leste for construction, possibly along with improvements to the pier area.



Figure 7: Conceptual design, Atauro Visitor & Conservation Center

## Develop an Action Plan

- Step 1: Formulate a Plan
- Step 2: Market Testing
- Step 3: Marketing and Promotion

Based on the broad objectives identified in Phases 1 and 2, USAID supported ATKOMA in a variety of activities related to marketing and promotion. For example, the Atauro Visitor brochure was updated, an island-wide tourist map was created and disseminated (see above).

It was determined that ATKOMA should take ownership of the new visitor brochure and update the content including the addition of future business advertising to off-set future costs for printing and distribution. Brochures and maps should be made readily available in the Dili-based visitor information center, in Dili hotels, in the hotels and homestays across Atauro, and on the boats/airplanes taking people to the island.

In addition, it was deemed necessary to update the Atauro website and improve online marketing of the destination. With today's consumers researching and planning more and more of their travel online, having an engaging, well-designed website is a critical component for Atauro's marketing strategy. To succeed online, Atauro's website must implement the necessary strategies to be found by potential clients. Employing search engine optimization (SEO), using important key words and generating fresh content are all part of creating and maintaining a successful website. It was also important that like the brochure, the website needs an owner who is responsible for managing and updating the site. ATKOMA was ideally positioned to play this role and use the website to support the organization's mission and revenue generation strategies.



Figure 6: ATKOMA tour brochure

ATKOMA also host journalists, bloggers, tour operators and social media influencers to generate earned media. Public relations and “earned media” remain one of the most important destination marketing strategies available. Travelers today are inspired and informed by traditional and social media to discover and plan their next vacation. With USAID's support, ATKOMA hosted travel journalists, bloggers, and social media influencers on sponsored media visit to Atauro resulting in new articles online and in print media that were viewed by thousands of people. In the future, Atauro can target specific media like diving publications and/or media from targeted geographic regions. The national government plays an important role in helping bring media to the country, but local businesses can also support these trips by providing in-kind support to and on the island.

Among Atauro's target markets, a significant and growing percentage of travelers rely on tour operators and travel agents to help design vacation packages or organize travel itineraries. The travel trade is always looking for the next destination to sell. For this reason, tour operators, both in Dili and in source markets, will be valuable sales and marketing partners for Atauro. By introducing and educating the travel trade about Atauro and the businesses and attractions available, these tour operators and travel agents will design and sell tour



packages to the island. Travel trade will be invited to participate in “FAM” or Familiarization Trips to experience the island first hand and identify the businesses they will incorporate into their tour packages.

For the *Hike to Manukoko Peak Experience* market testing was conducted courtesy of then-United States Ambassador to Timor-Leste Mr. Kevin Blackstone and some other intrepid travelers.



Figure 7: Breathtaking view from the top of Manucoco



Figure 8: Group Photo with Former US Ambassador to Timor-Leste

Ambassador Blackstone provided some valuable comments (see text box) that lead to adjustments to the product, including additional guide training, and more accurate tour timing. It was a stark reminder that continual engagement with customers to learn how to improve a tour or experience is essential to the development of a successful tourism experience.

As you requested, I am writing to offer some feedback on my ATKOMA-supported visit to Mt. Manucoco on May 9<sup>th</sup>, 2020.

First, I'd like to say that the support leading up to the event was very good. You were responsive throughout as I planned the trip, and Maun Valenti and Maun Fanuel showed up promptly the day before to brief us. During the hike, the team worked hard to ensure that my fellow hiker and I were safe, and we all had good conversation in Tetum and English. They were especially attentive to my movements on top of the hike near the cliff. The offer of a coconut for each of us on the way back was also very much appreciated.

However, there were some concerns also. During the discussion the day prior, joined by a Tetum speaker to ensure good communication, Valenti told us that the trek to the top would take three hours. I asked him about distance, and he was vague when I asked him about the reference I had seen on the Atauro Tourism website about a 5-6 hour trip totaling 11.2 kms in distance. We decided not to go so early, and I asked him for the return time if we left at 6. He said we could be back by 3 or 3:30, depending on how long we stopped for.

As we trekked up from Vila, however, it became clear that the distances were much greater than what was projected. After 5 kms, I asked Valenti again about the distance and duration of the trip. He said the entire trip would be 17 kms, so 8.5 kms to the top. But when we exceeded 8.5 kms, using his own app, and went to 10, 11, then 12 kms, it was clear that the team's ability to estimate distance and time was limited. I don't believe Valenti knew how long it would take or how far it was.

After five hours solid walking, we reached the summit - 13.8 kms from the start. We spent a short time and had to move back quickly, with no opportunities to stop for any period. Valenti did take a steep shortcut on the way back, which shortened our total trip by about 1.5 kms, but the entire trip was nine hours solid walking, plus 30 minutes at the top - a total of 26 kms.

My colleague and I brought three large bottles of water, but it was not enough, and we walked the last two hours without water. The young people who hosted us were kind and well-meaning. Each had an inspiring story about their desire to support tourism on Atauro, and Maun Fanuel was an intrepid tracker for us, always leading from the front. I tipped them at the end. To properly take care of tourists for an activity like this, however, the guides must be able to provide accurate information, and the website should also. The schedule you sent me was somewhat more accurate, but still less time than actually required, and it did not include distances.

The hike was well worth it, but I will admit at being disappointed by the inaccurate information and the inability of the guides to provide more accurate information, or answers to questions I had such as whether there were shorter, alternative routes.

I offer this feedback in an effort to help improve the service for others who will take the trip.

## Mt. Ramelau Area and Dokomali Waterfall

### Introduction

To support tourism growth in the *Ramelau*, *Blehitu*, and *Kablake* Area, Tourism For All in collaboration with the Asosiasaun Turizmu Ramelau Blehitu and Kablake (ASTRABEKA) and the Asosiasaun Operadores Turístiku Timor-Leste (AOTTTL) worked with the local community of Lebolau sub-village to develop the *Lebolau, Dokomali Waterfall and Darufu Traditional Village Tour*. This full day (8-10 hour) experience originating from Dili early in the morning provides visitors with a refreshing change from the bustle of Dili and a glimpse of the beauty of Timor-Leste's mountainous countryside and delightful rural communities. It's a perfect one-day adventure for business and leisure travelers alike, as well as residents of Dili.

### Product-Market Matching

#### Phase 1

Step 1: Market Assessment

Step 2: Asset Assessment

Step 3: Product-Market Match Evaluation

Early consultative visits to Hatubuilico by experts from USAID's Tourism For All Project in 2018 re-enforced the need for setting up a local stewardship council to lead the development of tourism in the area. In support of this endeavor, tourism stakeholders were invited to a one and half-day participatory mapping, visioning, and planning workshop organized hosted by USAID in partnership with the Ministry of Tourism, Commerce and Industry. Among other things deliberated, it was agreed to set up a tourism association to represent the *Ramelau*, *Blehitu*, and *Kablake* Area. In response to this goal, USAID supported the legal establishment of the Asosiasaun Turizmu Ramelau Blehitu and Kablake (ASTRABEKA) to serve as a local tourism association representing local government, industry and civil society to lead management and marketing of the region.

2018 was a particularly difficult time for tourism in Mt. Ramelau, which is an important Catholic site in Timor-Leste. Early in the year, the footpaths leading up to the peak were damaged by local vandals using spray paint and irresponsible visitors littering. As a result of this, a joint resolution by the Catholic Church and the Government of Timor-Leste through its Ministry of Tourism forced the closure of the site for visitors. This affected the community and lead to mistrust and suspicion amongst residents and between local and national government. The site was effectively closed for six months and only re-opened on October 7, 2018.

During the aforementioned workshop in which 66 people participated, some key opportunities and issues were raised the community. It was concluded that there are abundant tourist attractions on and around Mt. Ramelau many of which remain unexplored by the visitors. One of them being *Dokomali* an attractive site with a large waterfall, beautiful surroundings and a vibrant local community. It was also noted that there should be a local tourism information center where tour guides and other service providers can display their product information and even meet with visitors for in person sales. Furthermore, it was stated that an entrance fee should be charged and a portion reinvested directly in the local community. It was generally agreed that tourism represents a significant opportunity to

stimulate the economy of Hatobuilico and the Mt. Ramelau area through foreign exchange, investment, job creation and sector linkages, particularly with agriculture. Domestic tourism is already an economic driver and employment generator in the area with limited international tourists.

Several guiding principles/values were identified, including:

- Reducing suspicion amongst community members
- Building mutual trust within the community and across local and national government
- Establishing strong partnerships and a spirit of team work
- Improving interpersonal communications within the community
- Accepting and providing constructive criticism
- Working professionally
- Embracing a can-do spirit
- Using resources effectively and efficiently
- Understanding that tourism is cross-cutting with linkages to agriculture and other sectors

Leading to a 2030 Vision for ASTRABEKA.

*Mt. Ramelau and its surrounding areas will be more well-known, accessible, and preferable as a wonderful and unique tourist destination in Timor-Leste, where at the end its people will have a much better life in all aspects.*

In support of the vision, four goals were agreed upon to help bolster tourism's contribution to the region's economy.



#### **Goal 1: LEGAL FRAMEWORK & MANAGEMENT**

To establish a local tourism management body to implement managerial practice in line with relevant existing laws, regulations and the National Tourism Policy and local strategies



#### **Goal 2: HUMAN RESOURCE & INCOME GENERATION**

To provide training or workshops regarding tourism site management, entrepreneurship, and improving quality of food, accommodation and tour guide services



#### **Goal 3: INFRASTRUCTURE & ACCESSIBILITY**

To provide comfortable public basic infrastructure and transportation to increase accessibility and the connectivity of attractions



#### **Goal 4: PRESERVE AND PROMOTE THE NATURE AND CULTURE**

To preserve and promote local beauty of nature and values of culture as its competitive advantage

In support of Goal I, Tourism For All worked closely with local, regional and national public and private stakeholders to officially register ASTRABEKA with the Ministry of Justice, which occurred in October 2019. Subsequently, the project provided a grant to the association which helped them to equip a fully operable office *cum* tourist information center.

In the area of product development, based on suggestions from workshop participants, USAID's Tourism For All explored the Dokomali area located in the heart of Timor-Leste's coffee country in Ainaro District. Together with the local community ASTRABEKA and AOTTL, USAID curated a hiking tour product package including a moderate trek to the waterfall through scenic surroundings, visit to a local sacred house, traditional dance performance, and locally prepared food.

The strategic process that the community of business, government and civil society leaders engaged in, set in motion the development of the *Lebolau, Dokomali Waterfall and Darufu Traditional Village Tour*.

Using the Tourism Asset Rating System, Dokomali Waterfall and the local community scores a moderate **18** based on the below listed considerations.

| Asset              | Draw | Access | Duration | Development | Differentiation | Duplication | Total |
|--------------------|------|--------|----------|-------------|-----------------|-------------|-------|
| Dokomali Waterfall | 4    | 4      | 3        | 3           | 4               | 3           | 18    |

- Draw – Dokomali Waterfall is a unique tour product and it attract and motivate visitor to visit.
- Access – the road, trails and transportation access to Dokomali is reasonably good for Timor-Leste standards with a only a few bumpy stretches of road.
- Duration – The tour duration is 8-10 hours including coffee break and lunch starting and finishing in Dili.
- Development – Dokomali has natural landscape which originally was quite treacherous to trek. However, thanks to a grant from MTCI to ASTRABEKA, the site infrastructure including stairs, handrails, signage and even a dedicated photo spot has improved markedly.
- Differentiation – Dokomali is a unique waterfall, in a scenic spot with nearby local communities engaged in appealing cultural heritage. There are few one day experiences available in Timor-Leste due to long distances to attractions and poor road condition.
- Duplication – There are other waterfalls in Timor-Leste, but Dokomali has a first starter advantages due to its vicinity to the Capital and the upgraded infrastructure.

## Identify Needs and Opportunities

Step 1: Identify Needs

Step 2: Define Resources

Step 3: Analyze Needs and Opportunities

The members of ASTRABEKA identified a number of shortcomings in four specific areas in relation to overall quality of tourism in the area as summarized in the below table.

Table 7: Challenges & Needs

| Human Resources and Income Generation  | Legal Framework and Management   | Infrastructure and Accessibility  | Service Quality and Promotion  |
|--|--|---|--|
| Tourism awareness and local mindset/mentality for development. Reports of extreme social jealousies.         | Laws are lacking and there is overlap between national authorities causing confusion at the local level, e.g. MTCL and MAF | Conditions of road are poor and generally unsafe for tourism travel                                   | Quality and variety of food is not of basic international standard   |
| Limited English and other foreign language ability   | Need for decentralization of tourism in protected areas to ensure community engagement                                     | Telecommunications connectivity is sporadic and unreliable  | Quality of accommodation only meets the most basic of international standards  |
| Limited hospitality and tourism training   | Absence of environmental safeguards  | Electricity service is sporadic and there are limited generators in tourism-related establishments    | Limited duty of care for tourists, including lack of knowledge of first aid by local community and tourism service providers |
| Lack of understanding of how tourism economics functions and how to charge for services rendered to visitors | Encroachment of protected area by local communities  | Due to a lack of local transportation offer, accessibility to the area is expensive and unpredictable | Limited product offering in terms of tourism experiences or packages originating from Dili                                   |
| Limited financial literacy amongst micro and small enterprise owners   | Local culture and heritage preservation  | Quality of toilets and bathrooms is not of a basic international standard                             | No destination marketing   |

Notably, many of these shortcomings were also noted in the Sustainable Management Plan (SMP) for the Mt. Ramelau Eco-trail, which is intended as a 'go to' resource for community and local government leaders to effectively prioritize development activities, identify funding and partnership needs, and work in collaboration with other agencies and organizations to implement planned initiatives.

These challenges include:

### **'Macro' (Protected Area) Perspective**

- Altitude / PA Boundary Demarcation Issues
- Inter Govt. Agency Co-Ordination
- Lack of PA Management & Rules Enforcement
  - Adherence to 'Lisan / Tara Bandu'
- Roles & Responsibilities

### **'Micro' (Eco-Trail) Perspective**

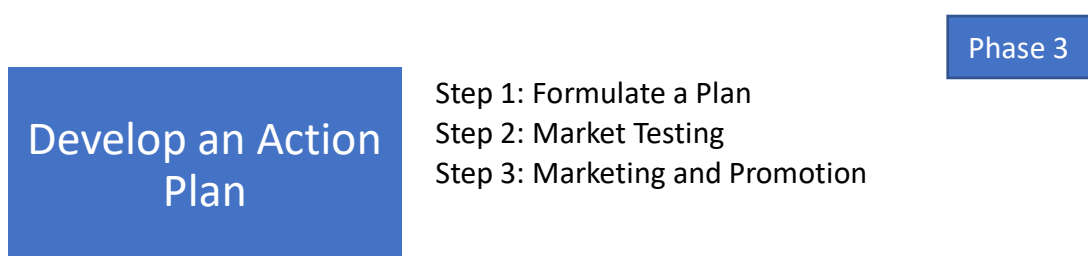
- Chapel Re-Development / Plateau Gate
- Poor Basic Infrastructure / Public Facilities
- Track Maintenance / Safety Issues
  - Rotten Tree Cutting
- Poor Waste Management / Graffiti Control

- Habitat Loss and/or Destruction
- Community Tourism Training
- **PROJECT CONTINUITY**
- Sanctuary Development
- Tourist User Fees? - Value for Money
- **OPERATIONAL FUNDING**

While the above-stated challenges were focused on the Mt. Ramelau Ecotrail, they are equally relevant to Dokomali.

Through advocacy of ASTRABEKA and with support from USAID, a grant was awarded to ASTRABEKA by the Government of Timor-Leste. MTCL conducted an assessment of local community needs to implement community-based tourism activities, and concluded that ASTRABEKA has the capacity and gravitas within the community to take responsibility for coordinating and managing community-based tourism grant projects, including: 1) upgrading of foot paths, stairs, signage, rest areas, and photo spots at Dokomali; 2) development of a camping site for visitors at the basecamp of Mt. Ramelau; and 3) construction of four public toilets along the trail to the Ramelau Sanctuary.

These improvements at Dokomali significantly improved the potential viability of the *Lebolau, Dokomali Waterfall and Darufu Traditional Village Tour*.



Based on the broad objectives identified in Phases 1 and 2, ASTRABEKA, MTCL, AOTTL and USAID supported the community of Lebolau to conceptualize, develop, curate and market test the *Lebolau, Dokomali Waterfall and Darufu Traditional Village Tour*.

Following a site inspection by project staff, a detailed descriptive itinerary was developed as featured below:



| <b>Lebolau, Dokomali Waterfall and Darufú Traditional Village Day Trip</b> |   |
|--|---|
| <b>Timor Plaza, Dili (6:50 am)</b>   | Meet with guide for a briefing on the day's activities.   |
| <b>Aisirimou 45 km (7:00 am-8.30 am)</b>                                   | Drive south to the mountains to the first stop at Aisirimou, an historical site with a monument to Nicolau Lobato (1 <sup>st</sup> Prime Minister of RDTL in 1975). Hear a brief presentation from your guide on Timor-Leste's history and struggle for independence.   |
| <b>Fleixa scenic view 37 km (8:30am-9:50 am.)</b>                          | Continue the drive to Fleixa scenic viewpoint over Mount Kablaki, where you can see as far as the south coast. An opportunity to stretch your legs and take photos.   |
| <b>Lebolau sub-village 17.2 km (10:00am-10:30am)</b>                       | Depart Fleixa for the drive through to Lebolau village. On arrival, the group will receive a warm welcome from the sub-village Chief Mr. Cristovao Pereira and meet the local guide, Mr. Miguel de Araújo (curator of the eco trail which passes through his plantations, and the Darufú traditional house). He will escort the group walk to Darufú. As a welcoming gesture, each guest is presented with a "selendang" scarf, made from "tais", a local hand-woven textile. |
| <b>Hike to Dokomali waterfall (10:30-13:40pm)</b>                          | The group leaves on foot with the local guide to Dokomali Waterfall (45 minutes' hiking with several breaks. The hike requires a medium level of agility and good fitness). On arrival at the waterfall, the group will have 30 minutes to enjoy the view and take photos.  |
| <b>Darufú traditional House, lunch (13:40pm-14:00pm)</b>                   | Walk back to the Darufú traditional house (15 minutes). On arrival at the cultural heritage site, experience a welcome ceremony with a traditional dance performance and remarks by the chief of sub-village, representing the host families. <b>Lunch</b> will be served with <b>local cuisine and dance performances</b> . (1H30 minutes estimate). Farewell to the villagers, and departure for Aileu.   |
| <b>Aileu (14:05pm-16:20pm)</b>   | Arrival at Projecto Montanha training center for a rest stop. The youth of this training center will guide the group on a short visit. There is an opportunity to purchase refreshments and beautiful handicrafts produced by the young people.<br>Departure for Dili   |
| <b>Timor Plaza, Dili (estimated time of arrival 16:50-18:00)</b>           | Itinerary subject to weather & road conditions!<br><b>Things to bring:</b> Walking stick and boots, rain jacket or an umbrella, refillable water bottle, mosquito & insect repellent, sunscreen, sunglasses and camera!   |

**Figure 9:** Itinerary for one day trip to Dokomali

In July 2021, USAID's Tourism For All organized a familiarization trip with a group of nine tourism influencers to market test the *Lebolau, Dokomali Waterfall and Darufu Traditional Village Tour*. Participants included journalists from Televizaun Edukasaun, Timor Post, Suara Timor Lorosae, Loluwari online media; a freelance content creator and videographer from Travel Inspired Community; and representatives of two tour operators (Island Explorer and Timor Unearthed).

In order to gain insights on the quality of the tour experience, the project administered a survey (as presented in the Annex of this report) probing the level of satisfaction with the individual tour components and the overall itinerary. Overall, participants ranked the experience as Satisfactory (11%), Good (44.4%) and Excellent (44.4%). The cultural performance was a highlight with 88.9% rating it as Excellent. Transportation ranked low due to the poor quality of roads as well as the vehicle (Toyota Troop Carrier), which was selected to increase capacity (8 guests) and reduce cost (\$135 including driver and fuel) or \$17 per passenger. Comparatively, a Toyota Prado can comfortably seat six guests and costs \$177 or \$30 per passenger. In Timor-Leste rental of cars is notoriously expensive and therefore it was important to keep this cost down in order to offer the tour at \$50 per person.

## ANNEX

### I Sample Product Survey

The following survey template is adapted from surveys used for tourism product familiarization trips conducted by USAID's Tourism for All Project.

**Thank you for your participation in [product name]. Please complete the questions in the survey to provide the information to improve the tour product in the future.**

1. What is your gender?  
☐ Female    ☐ Male
2. What is your age group?  
☐ 10-14  
☐ 15-19  
☐ 20-24  
☐ 25-29  
☐ 30-35  
☐ 36 or older
3. What is your current profession?  
☐ Government's Staff  
☐ Tourism Business Staff  
☐ Embassy and International Agency  
☐ International NGO  
☐ Local NGO  
☐ Media  
☐ Student  
☐ Not Current Employed  
☐ Other

If other, please specify: .....

4. How did you find out about [product name]? (please mark all that apply)  
☐ Internet/Google  
☐ USAID's Tourism For All staff  
☐ Facebook  
☐ Family  
☐ Colleagues  
☐ Email  
☐ Newspaper  
☐ Brochure  
☐ Other

If other, please specify: .....

5. Overall, how satisfied are you with the tour experience?

- ☐ Disappointed
- ☐ Dissatisfied
- ☐ Satisfied
- ☐ Good
- ☐ Excellent

6. How would you rate the following aspects of your experience?

a. How would you rate **[aspect #1]**?

- ☐ Disappointed
- ☐ Dissatisfied
- ☐ Satisfied
- ☐ Good
- ☐ Excellent

b. How would you rate **[aspect #2]**?

- ☐ Disappointed
- ☐ Dissatisfied
- ☐ Satisfied
- ☐ Good
- ☐ Excellent

c. How would you rate **[aspect #3]**?

- ☐ Disappointed
- ☐ Dissatisfied
- ☐ Satisfied
- ☐ Good
- ☐ Excellent

d. How would you rate the food?

- ☐ Disappointed
- ☐ Dissatisfied
- ☐ Satisfied
- ☐ Good
- ☐ Excellent

e. How would you rate the tour guide?

- ☐ Disappointed
- ☐ Dissatisfied
- ☐ Satisfied
- ☐ Good
- ☐ Excellent

f. How would you rate the drive?

- ☐ Disappointed
- ☐ Dissatisfied
- ☐ Satisfied

- ☐ Good
- ☐ Excellent

g. How would you rate the transportation?

- ☐ Disappointed
- ☐ Dissatisfied
- ☐ Satisfied
- ☐ Good
- ☐ Excellent

7. What was your favorite part of [product name]?

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8. Was there anything about [product name] that you didn't like? Please feel free to go into as much detail as possible

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9. How can [product name] be improved?

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10. Rate Your Experience During [product name].

a. Guide introduced themselves and was welcoming and hospitable.

- ☐ Strongly disagree
- ☐ Disagree
- ☐ Neither disagree nor agree
- ☐ Agree
- ☐ Strongly Agree

b. Guide was knowledgeable and well-spoken about [product name].

- ☐ Strongly disagree
- ☐ Disagree
- ☐ Neither disagree nor agree
- ☐ Agree
- ☐ Strongly Agree

c. The level of physical fitness required to enjoy [product name].

- ☐ Strongly disagree
- ☐ Disagree
- ☐ Neither disagree nor agree
- ☐ Agree
- ☐ Strongly Agree

d. I felt my tour of [product name] was thorough.

- ☐ Strongly disagree
- ☐ Disagree

- ☐ Neither disagree nor agree
- ☐ Agree
- ☐ Strongly Agree

e. The duration of [product name] was appropriate.

- ☐ Strongly disagree
- ☐ Disagree
- ☐ Neither disagree nor agree
- ☐ Agree
- ☐ Strongly Agree

11. [Product name] is going to be sold for US\$XXX per person. How would you rate the value for money of the tour based on this price?

- ☐ Excellent Value
- ☐ Reasonable
- ☐ Expensive

12. [Product name] is going to be sold at US\$XX per person. How would you rate the value for money of the tour based on this price?

- ☐ Excellent
- ☐ Reasonable
- ☐ Expensive

13. Would you recommend this product to your friends or family members?

- ☐ Yes
- ☐ No

14. Do you think that the brochure accurately represents/describes the tour experience?

- ☐ Yes
- ☐ No

If no, what changes would you suggest?

---



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15. How would you suggest marketing this product? (please mark all that apply)

- ☐ Brochure
- ☐ Facebook
- ☐ Hotel Reception Desks/Lobbies
- ☐ Instagram
- ☐ Restaurant
- ☐ Embassy and NGO's Office
- ☐ YouTube
- ☐ Other

If other, please specify: .....

16. Do you have any other comments you would like to add? Please provide your comments below:

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