

Lake Toba

World's Largest Volcanic Lake

**TOURISM DEVELOPMENT AND
INVESTMENT OPPORTUNITIES**


1 COUNTRY OVERVIEW

2 LAKE TOBA PROFILE

3 INVESTMENT OPPORTUNITIES

Highlights

COUNTRY OVERVIEW

A black and white photograph of President Joko Widodo (Jokowi) seated at a large wooden desk in a formal office setting. He is wearing a white shirt and is smiling while looking towards the left. On the desk in front of him is a laptop, a microphone, and a nameplate that reads "PRESIDEN RI". To his left, another man is partially visible, also smiling. The background shows a large, paneled door and a portion of the Indonesian flag on the far left. In the foreground, the back of a person's head is visible, looking towards the President.

President Joko Widodo (Jokowi) has established four super priority destinations, namely Lake Toba, Mandalika, Borobudur, and Labuan Bajo. All Facilities and Infrastructure for 4 New Bali Super Priorities must be completed by 2020.

Super Priority Tourism Destination Development Limited

Arahan PRESIDEN



wonderful
indonesia

“

Segala bentuk kendala regulasi
harus kita sederhanakan, harus kita
potong, harus kita pangkas.. ”

”

“All kinds of bottlenecks in regulations must be
simplified, must be cut and reduced”

Presiden Jokowi

Presiden Republik Indonesia

Pidato Pelantikan Presiden RI 2019-2024 di Sidang Paripurna MPR



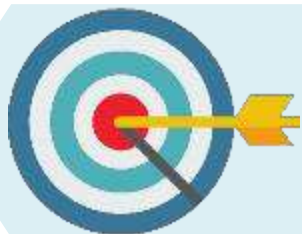


10 PRIORITY TOURISM DESTINATIONS





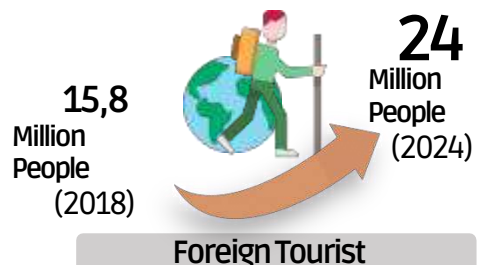
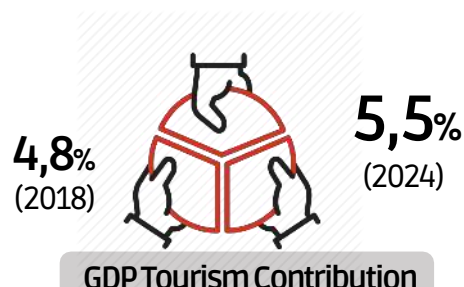
TOURISM DEVELOPMENT TARGET 2020-2024



TARGET

To increase the image, competitiveness, and contribution of tourism sector in supporting the improvement of people's welfare and quality economic growth

4 TOURISM DEVELOPMENT PILLARS



1

Improvement of Industrial Competitiveness and Tourism Business Ecosystem

2

Improvement of Accessibility, Amenity, Attraction, and Tourism Destination Governance

3

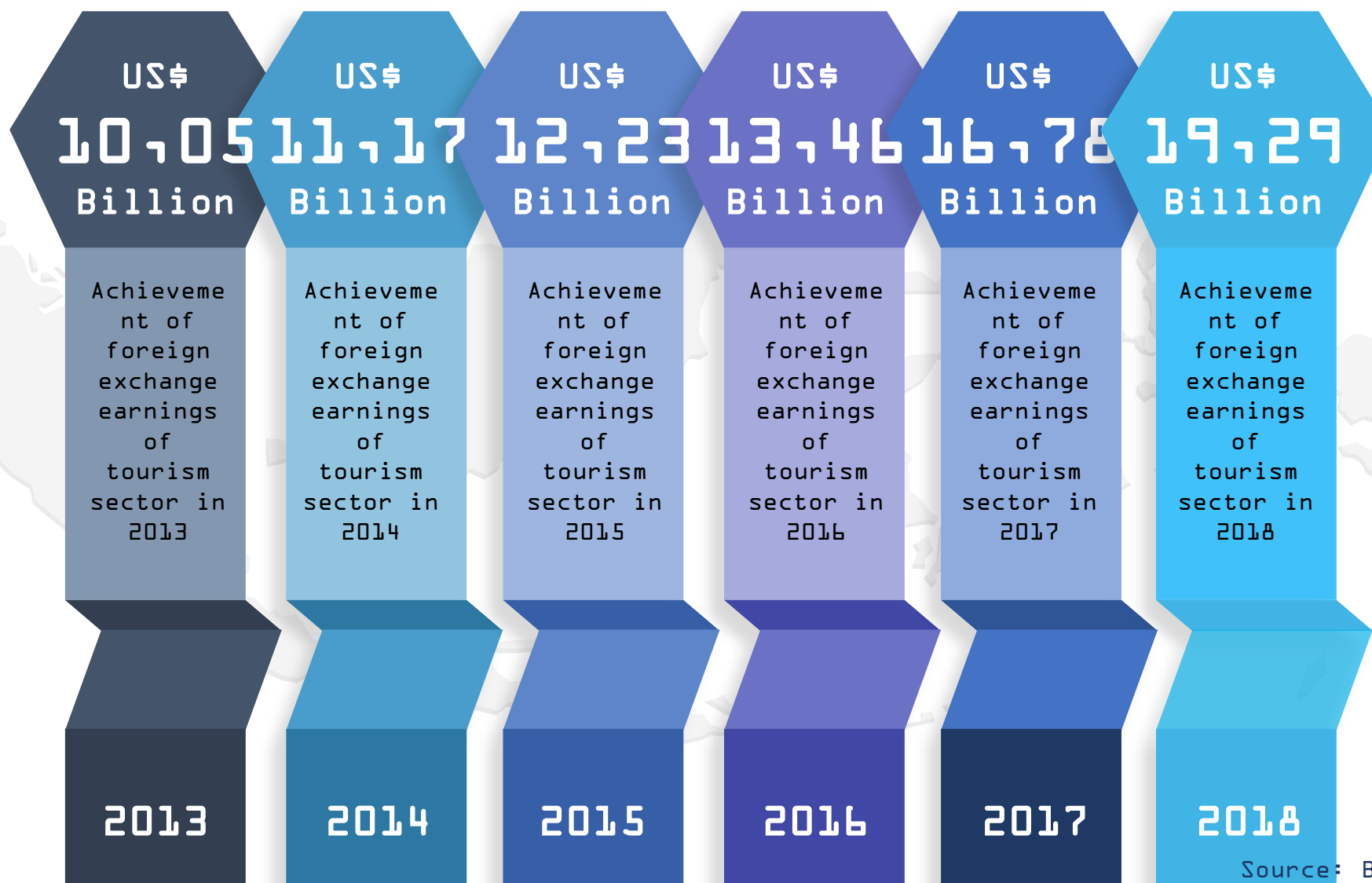
Improvement of Human Resources Quality in Tourism Sector

4

Strengthening Tourism Image and Marketing Diversification



FOREIGN EXCHANGE PROGRESSION IN TOURISM SECTOR



Source: Badan Pusat Statistik (BPS)

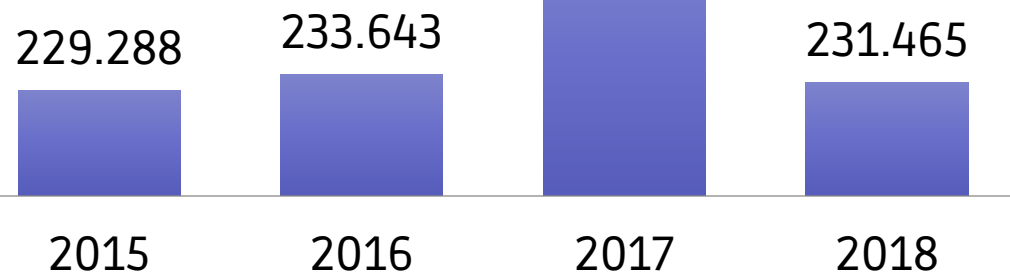


NORTH SUMATERA TOURISM STATISTICS 2015-2018



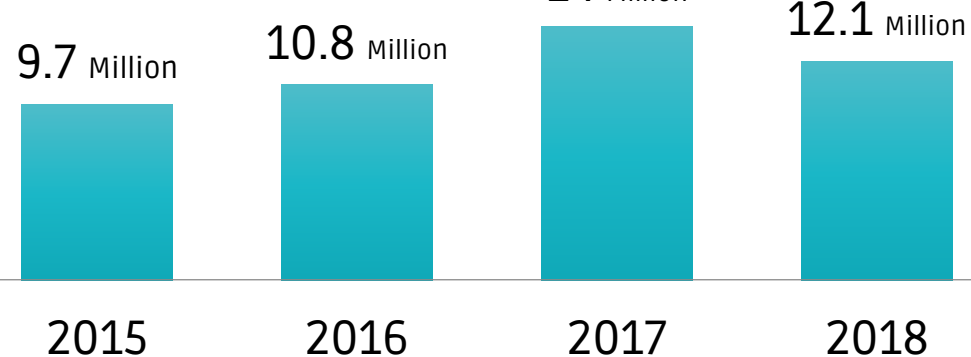
FOREIGN TOURISTS

270.292

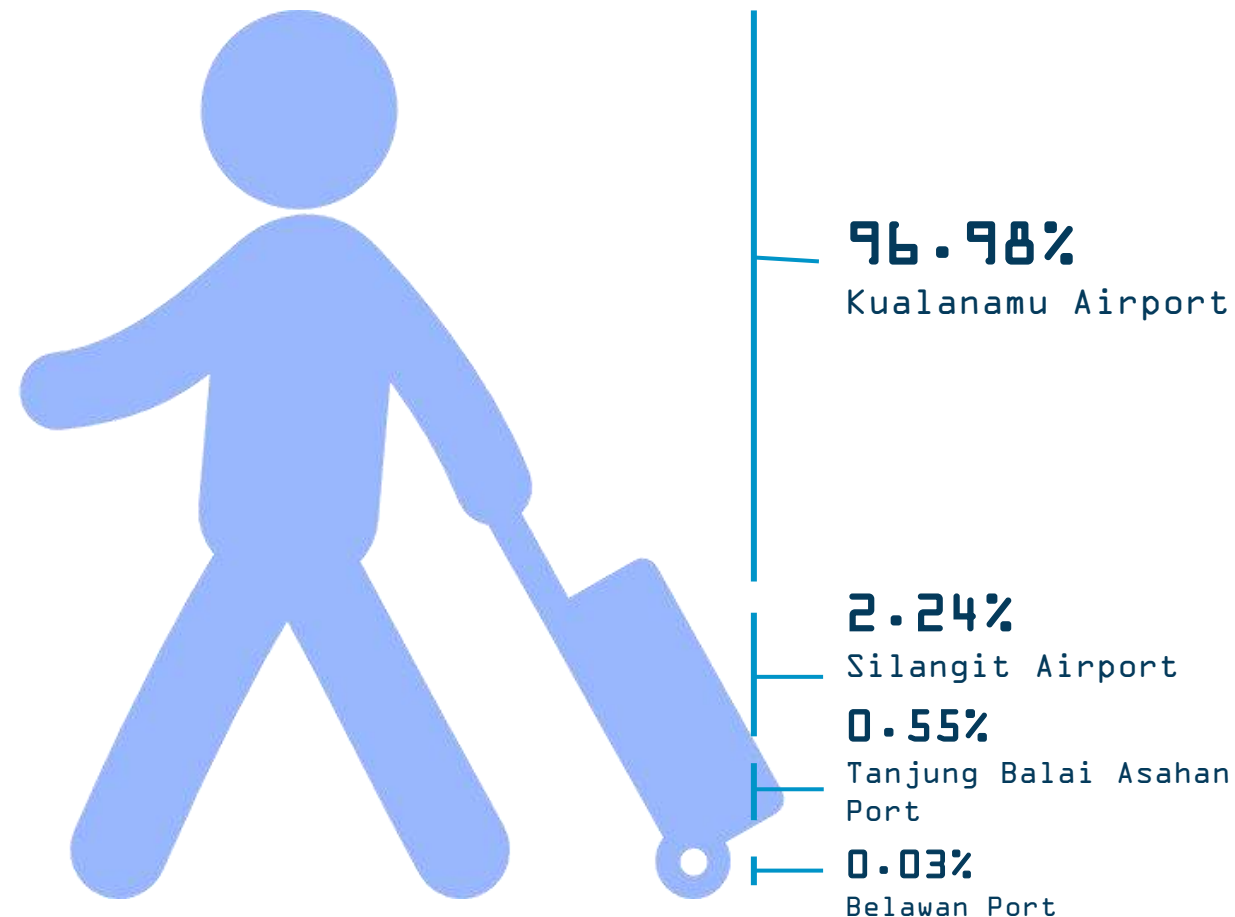


DOMESTIC TOURISTS

14 Million



FOREIGN TOURISTS IN NORTH SUMATERA FROM 4 (FOUR) GATE 2018





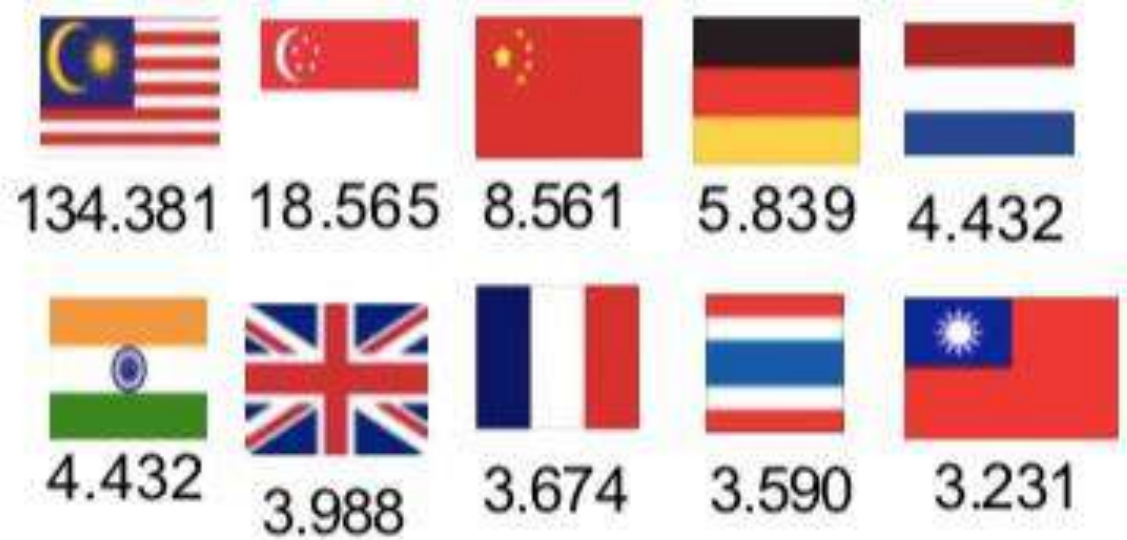
TOP 10 FOREIGN TOURISTS THROUGH GATE 2018



SILANGIT AIRPORT



KUALANAMU AIRPORT



□ **Lake Toba Tourism Authority**, established based on **Presidential Decree 49 of 2016**, is a professionally-managed Public Service Agency that is able to prioritize the synchronization and stakeholder coordination effort, which relates to investment and business of tourism industry, between Local Government, Central Government and Community.

- The Lake Toba Tourism Authority has the following tasks:
1. **To Facilitate** Coordination, Synchronization, Planning and Development within Lake Toba Destination
 2. **To Conduct** Planning, Development, and Management within Designated Development Area
 3. **To Promote** tourism in Lake Toba Destination

ADVISORY BOARD (13 Ministers + 1 Governor)

Chairman: Coordinating Minister for Maritime Affairs
Chairman of Daily Executive : Minister of Tourism

EXECUTING BOARD



LAKE TOBA PROFILE



NORTH SUMATRA AND LAKE TOBA OVERVIEW

North Sumatra

North Sumatra is the 7th biggest province by regional GDP. It has 14M with a growth rate at ~1.8% per year. Income per capita is around IDR 44M per year. Employment rate is at 70% with a low minimum wage level of under IDR 2M per month.

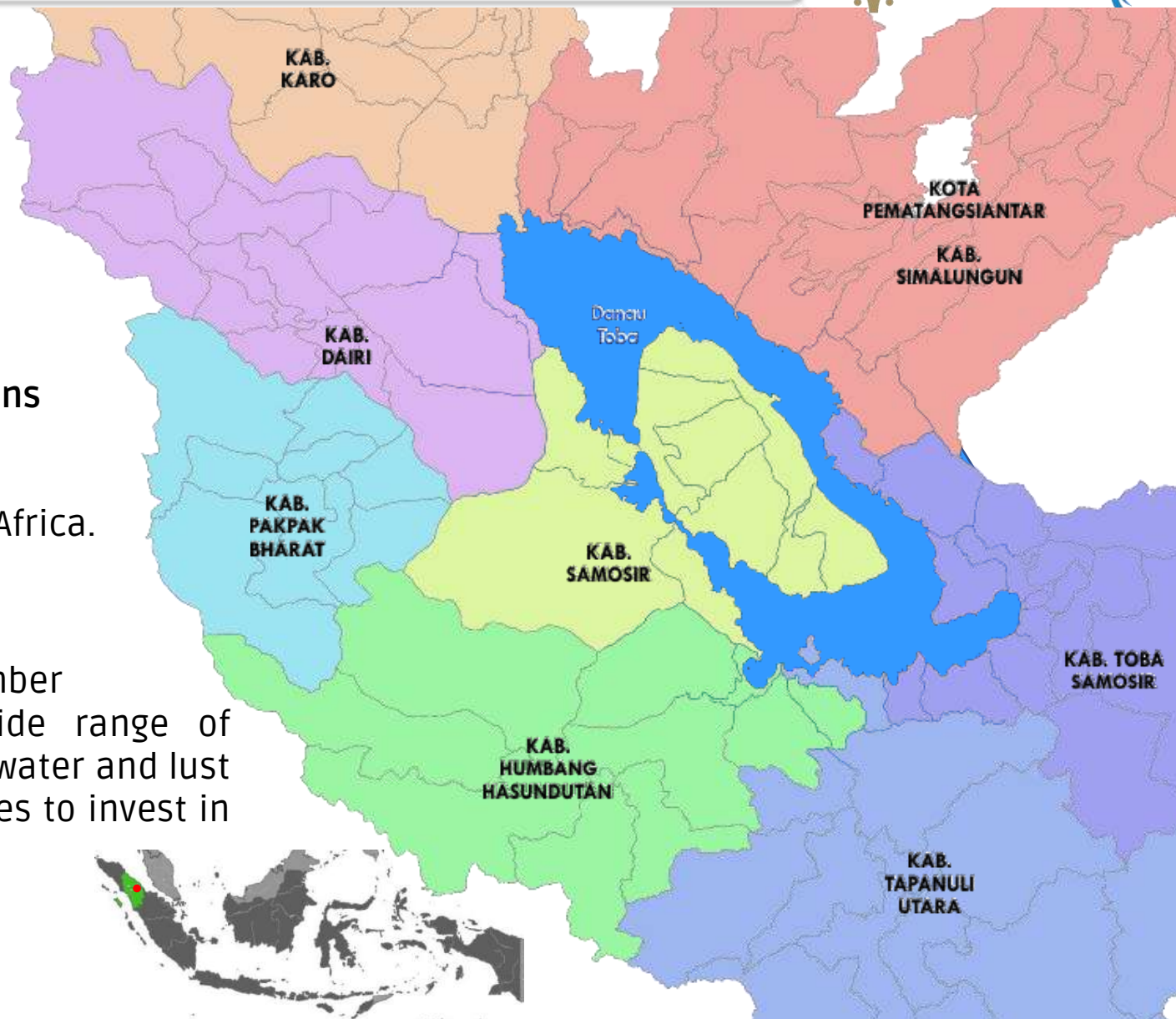
Highlights of LAKE TOBA

- Lake Toba is one of the four special priority destinations assigned by the Government.
- **The largest volcanic lake in the world and the second largest lake in the world after Victoria Lake in Africa.**
- **One out of ten deepest lake in the world, reaching around 500 meters deep.**

The distinctive geographical of Lake Toba reserves a number of economic potentials for the benefit of the wide range of communities, especially as a source of bountiful fresh water and lush tropical forest which attract the interest of big industries to invest in the areas.

Key Tourism Areas:

- ✧ Parapat in Simalungun Regency
- ✧ Samosir Island in Samosir Regency
- ✧ Balige in Toba Samosir Regency

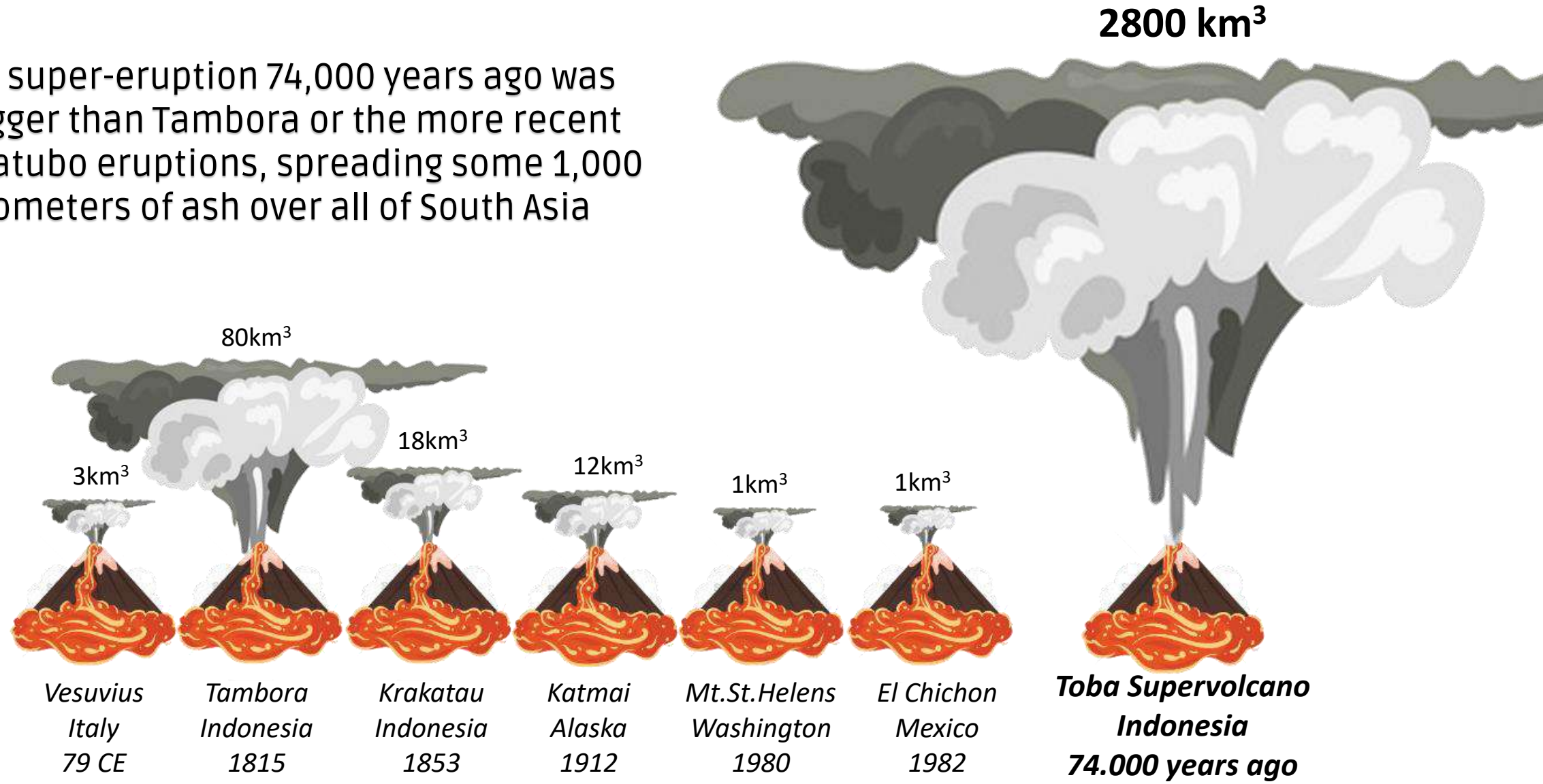




TOBA, A GIANT SUPERVOLCANO, VERSUS OTHER



The Toba super-eruption 74,000 years ago was much bigger than Tambora or the more recent 1991 Pinatubo eruptions, spreading some 1,000 cubic kilometers of ash over all of South Asia





TOBA CALDERA GEOPARK AS MEMBER OF UGG



United Nations
Educational, Scientific and
Cultural Organization





UNESCO
Global
Geoparks



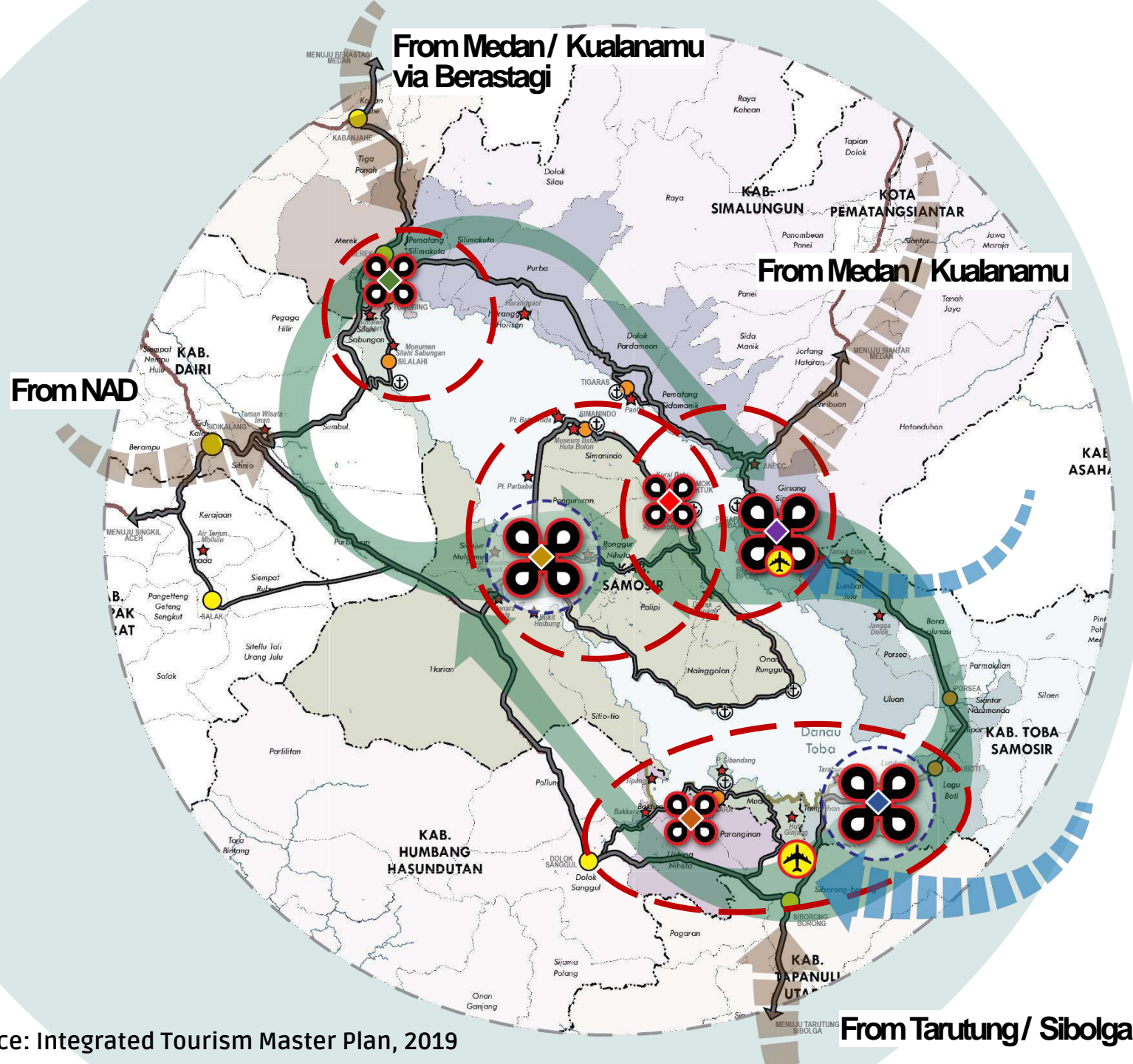
The Indonesian Government proposes national geoparks Toba, to be enlisted as UNESCO Global Geoparks. This was conveyed during the Asia Pacific Geoparks Networks (APGN) 2019 which is held in Lombok, West Nusa Tenggara, on August 30 to September 6














 United Nations Educational, Scientific and Cultural Organization		 UNESCO Global Geoparks
Summary of the results of the UGGP evaluations and revalidations 2019:		
a) New applications: 10 accepted, 03 deferred and 0 rejected		
b) Extension request >10% - new application : 1 accepted		
c) Deferred from previous meetings: 5 accepted, 0 rejected		
d) Revalidations: 37 green cards, 0 yellow cards and 1 red card		
e) Extension and reduction requests (< 10 %) : 6 accepted, 0 rejected		
a) Evaluations of new UNESCO Global Geopark Applications		
1. Cliffs of Fundy (Canada)	ACCEPTED	
2. Discovery (Canada)	ACCEPTED	
3. Xiangxi (China)	ACCEPTED	
4. Zhangye (China)	ACCEPTED	
5. Lauhanvuon-Haemaenkangas (Finland)	ACCEPTED	
6. Hamnangang (Korea Rep. of)	ACCEPTED	
7. Granada (Spain)	ACCEPTED	
8. Maestrazgo (Spain)	ACCEPTED	
9. Dak Nong (Vietnam)	ACCEPTED	
10. Rio Coco (Nicaragua)	ACCEPTED	
b) Evaluation of Extension		
1. Kula-Satshi (Turkey)		
c) UNESCO Global Geoparks		
2016		
1. Black Country (UK)	ACCEPTED	
2017		
1. Djurdap (Serbia)	ACCEPTED	
2018		
1. Toba Caldera (Indonesia)	ACCEPTED	
2. Estrela (Portugal)	ACCEPTED	
3. Yangan Tau (Federation of Russia)	ACCEPTED	
d) Revalidations of existing UNESCO Global Geoparks:		
1. Naturpark Steirische Eisenwurzen (Austria)	GREEN	

2018	1. Toba Caldera (Indonesia)	ACCEPTED
	2. Estrela (Portugal)	ACCEPTED
	3. Yangan Tau (Federation of Russia)	ACCEPTED

DEVELOPMENT SCENARIO TOURISM DESTINATION CONCEPT



-  Key Tourism Area (KTA) / N-KTA
 -  Parapat + Sibisa
 -  Simanindo
 -  Pangururan
 -  Balige
 -  Merek
 -  Muara – Baktiraja
-  Cluster / Extended KTA
-  Tourism Corridor
-  Tourism Gate - Road
-  Tourism Gate - Air



VISITOR GROWTH SCENARIO

with economic, demographic and land use impacts (TDA, 2045)



	present	'moderate'	'optimistic'	'national policy'
Domestic visitors	1.734.000	3.769.000	5.144.000	5.144.500
Foreign visitors	121.900	358.3300	464.300	2.000.000
TOTAL VISITORS	1.856.000	4.127.000	5.608.000	7.144.500
GDP contribution (IDR trillion)	1,68	13,8	17,8	23,9
Employment (total)	39.600	87.600	118.600	150.600
Employment growth	0	+48.000	+79.000	+111.000
Net migration effect	0	+48.000	+79.000	+111.000
Population growth	0	+76.000	+107.000	+139.000
Total population	437.000	513.000	544.000	576.000
Extra rooms needed	0	+3.155	+9.005	+18.885
Total rooms needed	6.160	9.315	15.165	25.045
Extra land requirements (ha)	0	+1.885	+2.660	+4.175

SCENARIO

Source: Draft Integrated Tourism Master Plan, September 2019

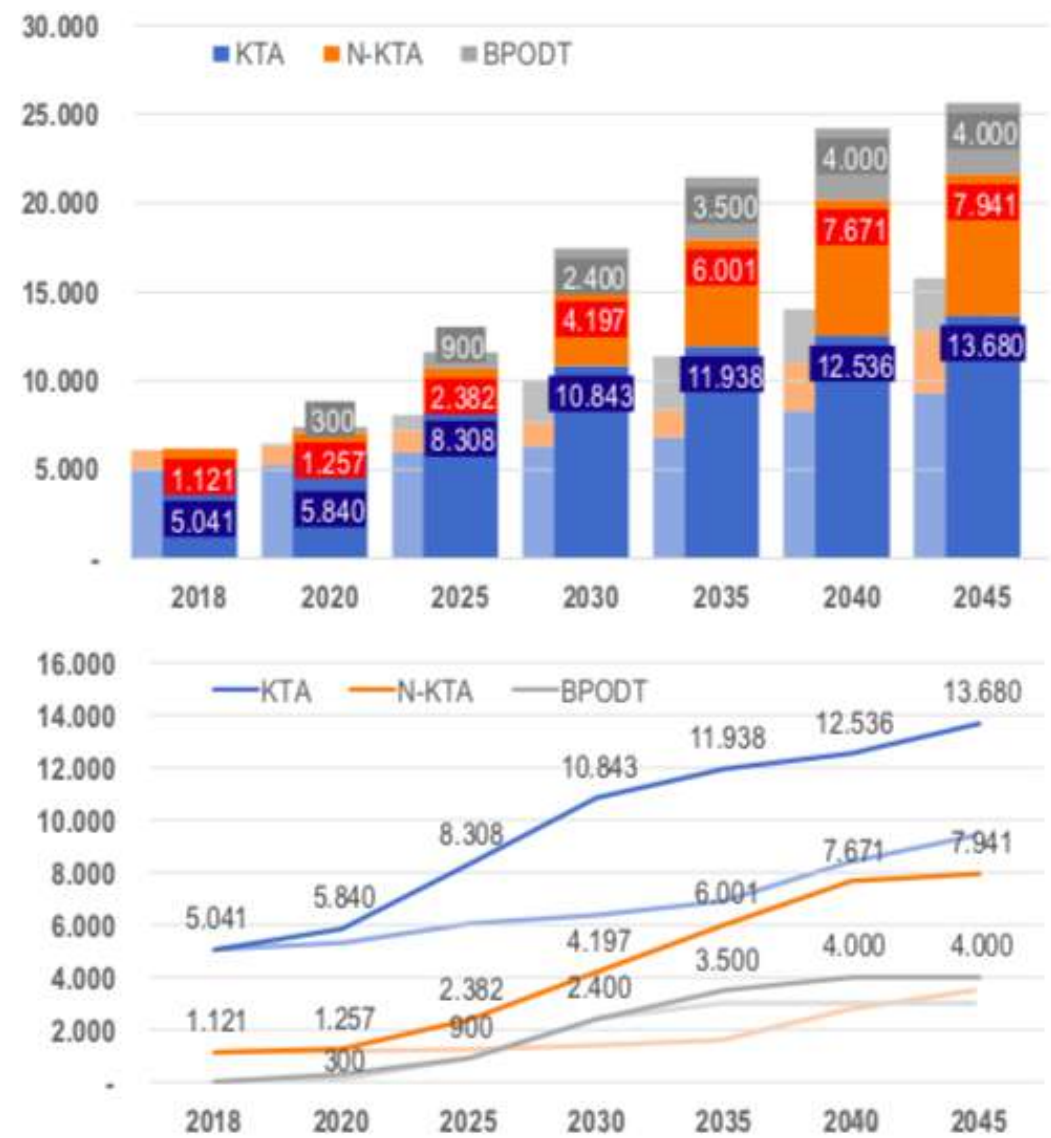
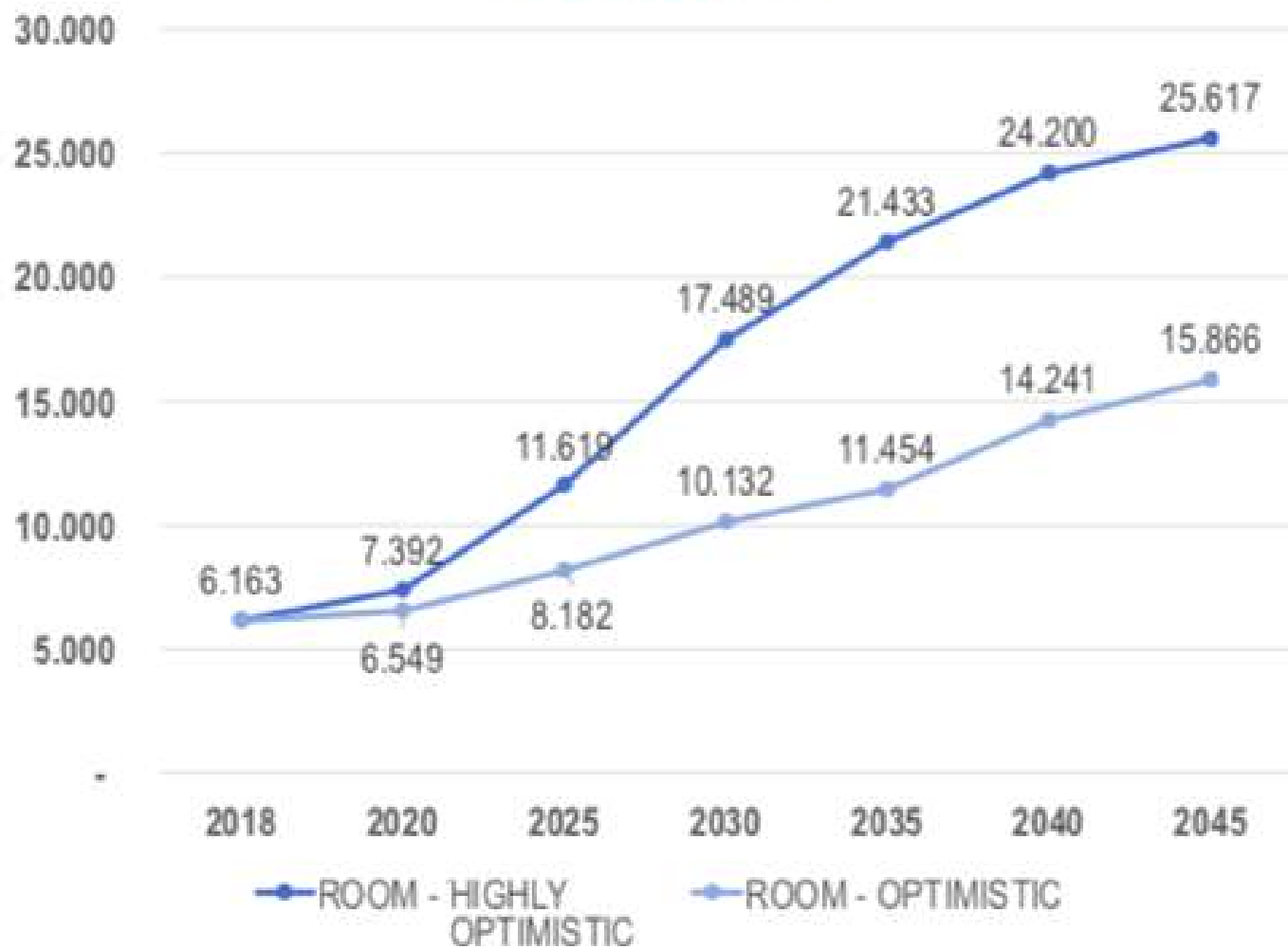
1. Moderate scenario that may result from a continuation of present policies.
2. Optimistic scenario that should be the out-come of positive demographic and economic developments in the most important origins, combined with an ambitious program of improvements for Lake Toba as a destination.
3. National policy scenario that aims at realising a future level of 2 million foreign visitors per year, in accordance with a policy target for Indonesia as a whole, set by the Government at 74 million foreign visitors in 2045.



ROOM PROJECTIONS



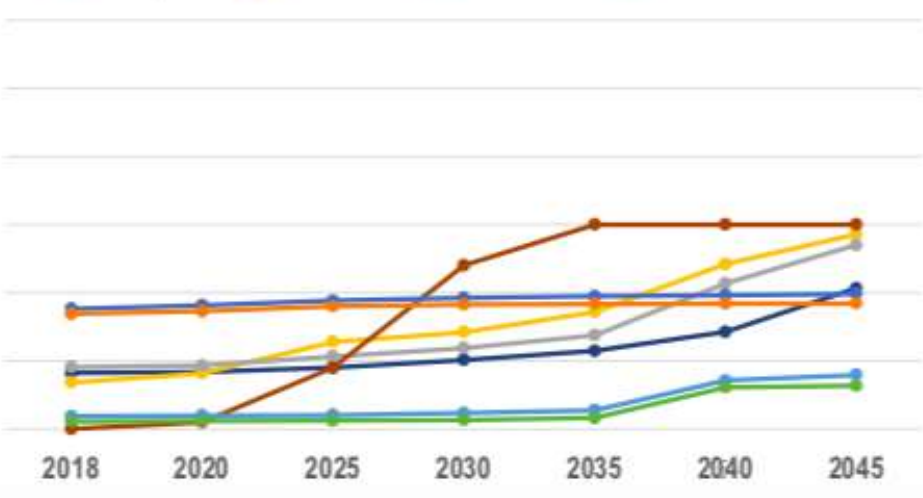
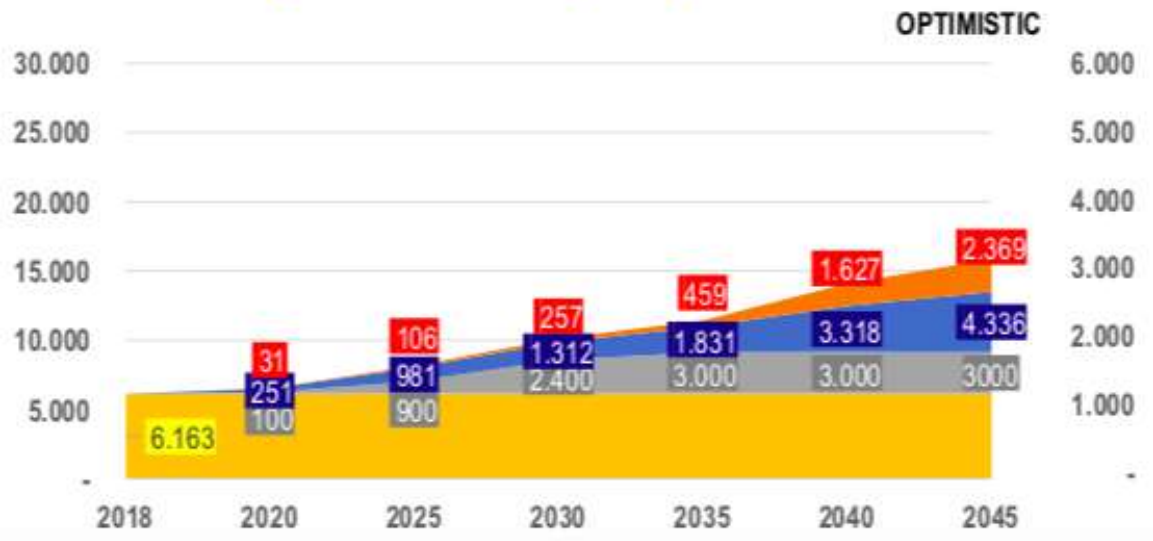
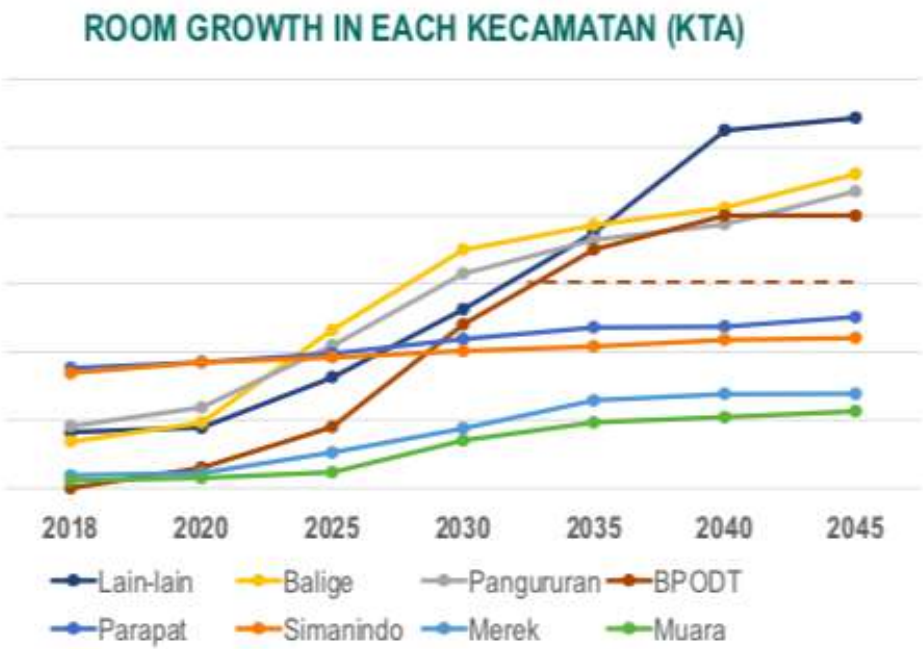
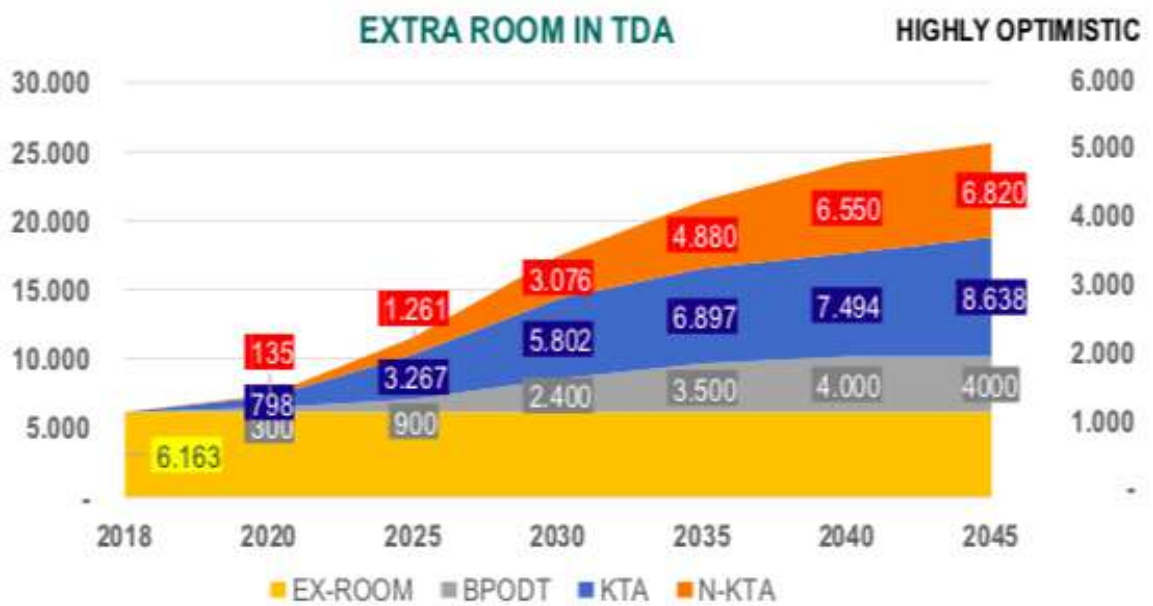
ROOMS IN TDA



Source: Draft Integrated Tourism Master Plan, August 2019



ROOM PROJECTIONS



Source: Draft Integrated Tourism Master Plan, August 2019



HOW TO GET TO LAKE TOBA?



Kualanamu Airport (KNO)

International Direct Flights :

Amsterdam, Kuala Lumpur,
Singapore, Bangkok

Domestic Direct Flights :

Jakarta, Bandung, Surabaya,
Yogyakarta, Makasar, Batam, Banda
Aceh, etc

Silangit Airport (DTB)

Domestic Direct Flights :

Jakarta, Kualanamu, Batam

International Direct Flights :

Kuala Lumpur

Sibisa Airport (SIW)

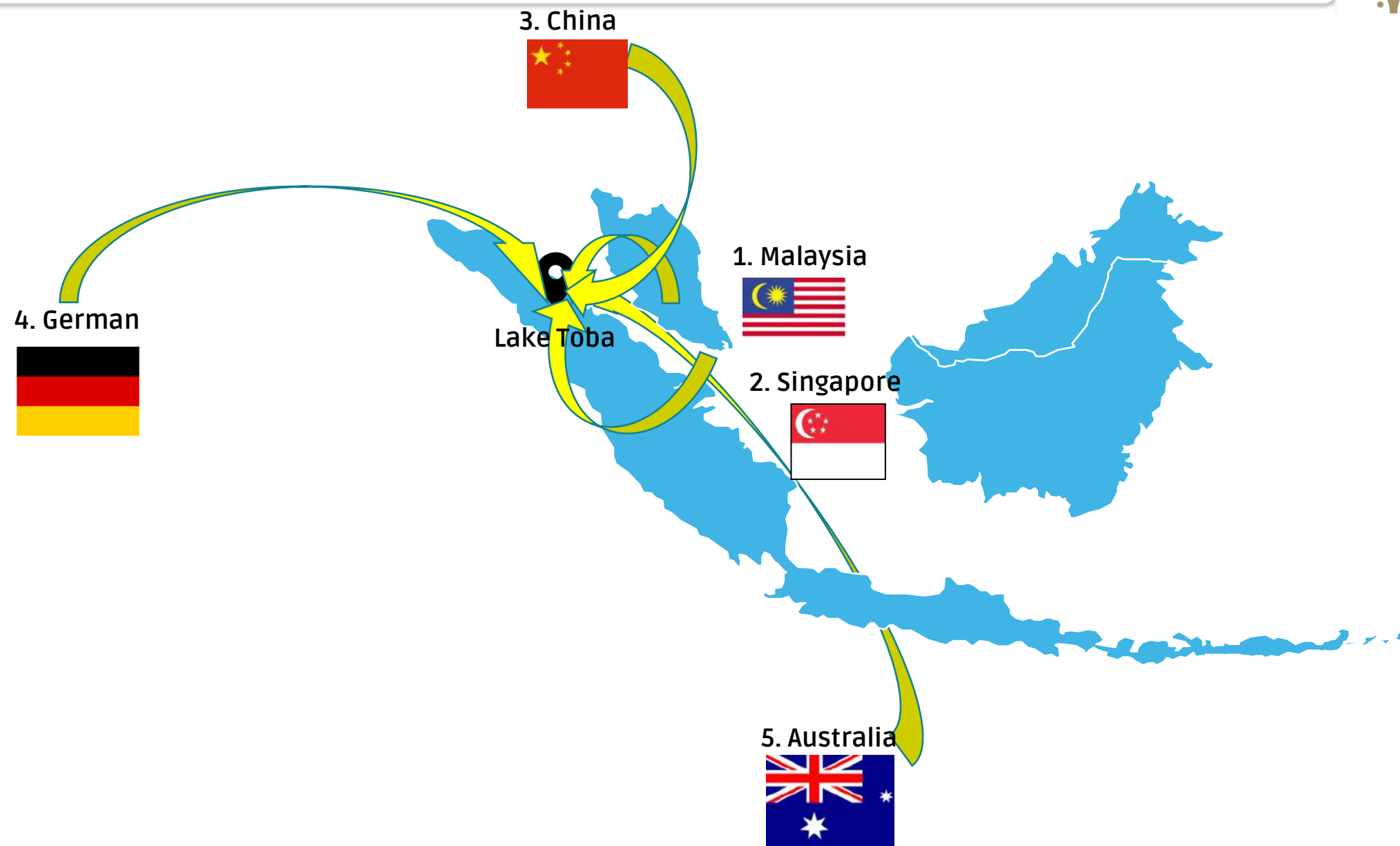
Open for special flights

“Special arranged (charter flight) is
available on request”





TOP 5 FOREIGN VISITOR'S ORIGIN COUNTRY



The Family Getaway



The Young Couple



The Adventure Traveller



The Corporate Retreat



RELIGIOUS



EDUCATION



GEPARK





INFRASTRUCTURE SUPPORT Ministry of Public Works And Public Housing

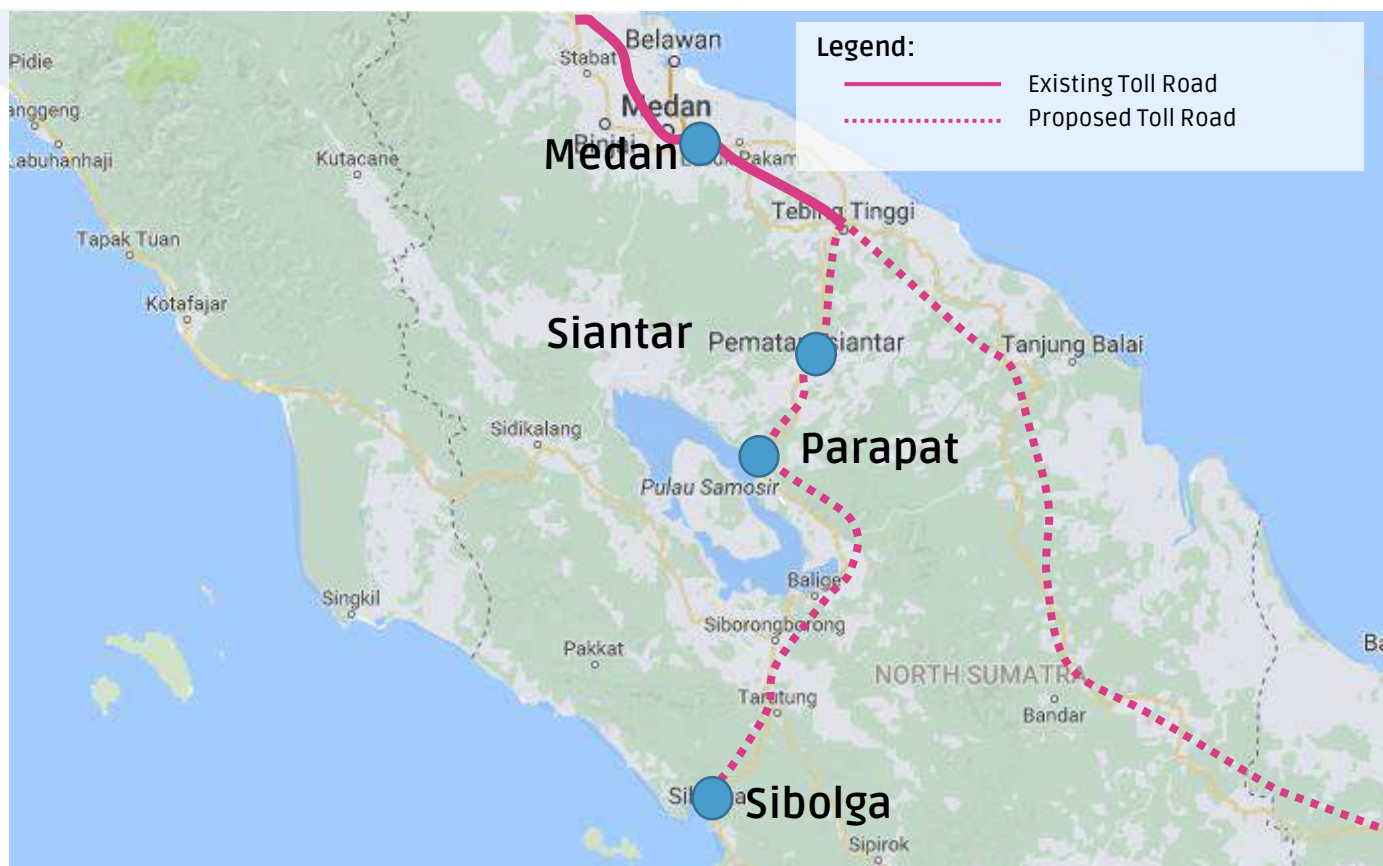
1. Kuala Tanjung - Tebing Tinggi – Parapat Toll Road
2. Samosir Ring Road
3. Tomok Area Redevelopment
4. Channel Widening & New Bridge of Tano Ponggol and Pangururan Waterfront City
5. Tele Geopark Tourism
6. Huta Ginjang Area Redevelopment Plan
7. Lumban Pea Tourism Area Plan
8. Lumban Julu Rest Area Plan
9. Structuring the Dolok Sipiak Region
10. Parapat Public Open Space (Opposite Atsari Hotel)
11. Balerong Revitalisation in Balige City

 Highway

 Ring Road Samosir

INFRASTRUCTURE UPDATES

Medan – Tebing Tinggi Toll Road



Medan-Kualanamu-Tebing Tinggi toll road has been operating 100% with the operation of the Kualanamu - Tebing Tinggi toll road in April 2019

Tebing Tinggi – Siantar: 58 km is on progress construction and targeted to operate on Q3 2020

Siantar - Parapat: 50 km is in the stage of land acquisition

Toll Road Kualanamu - Rampah

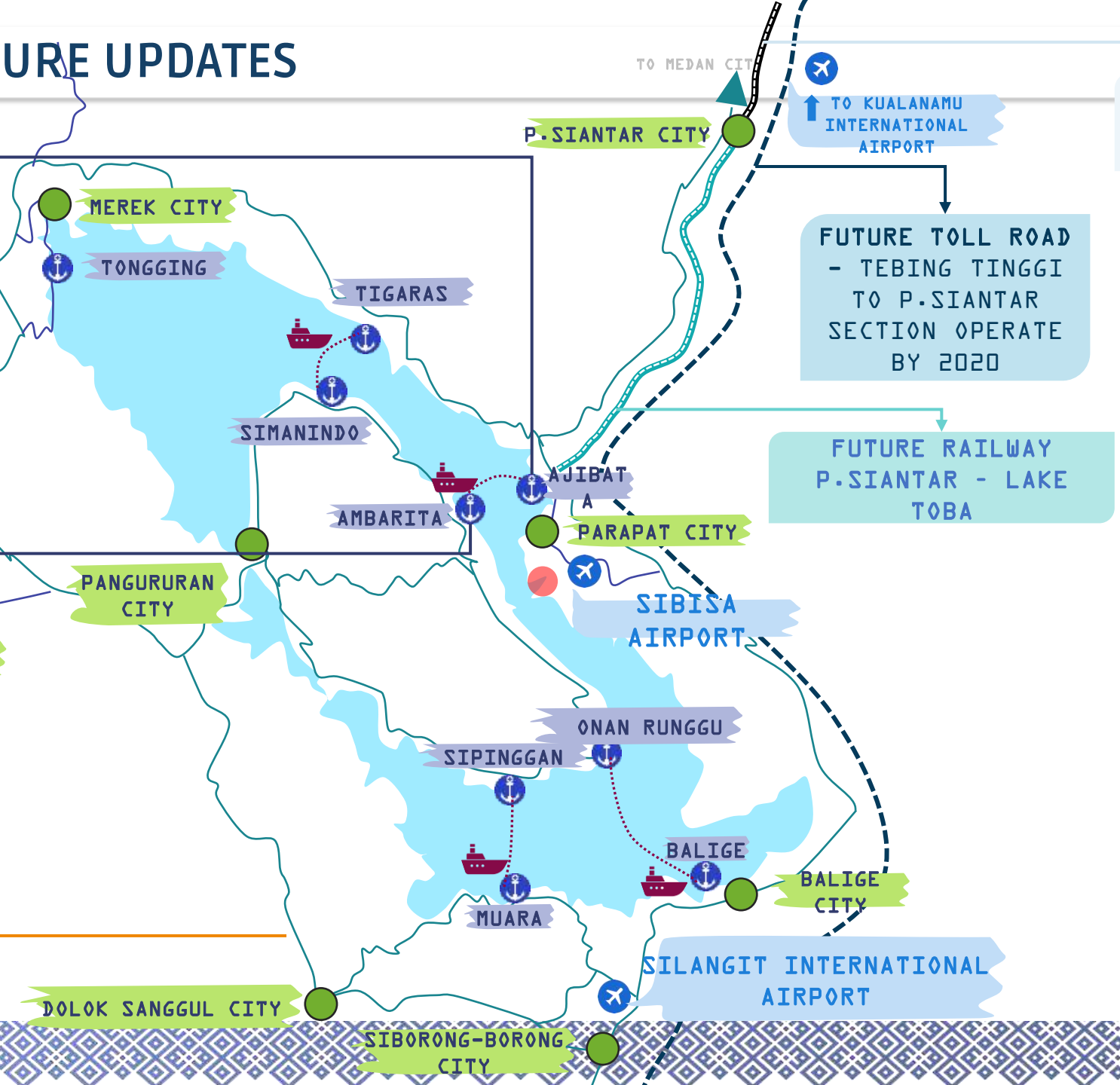
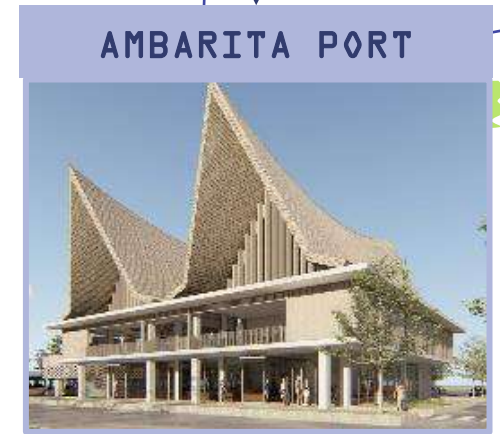


Inauguration of Toll Kualanamu – Rambah 14 October 2017





INFRASTRUCTURE UPDATES



UPGRADING RAILWAY
MEDAN - P. SIANTAR

FUTURE TOLL ROAD
- TEBING TINGGI
TO P. SIANTAR
SECTION OPERATE
BY 2020

FUTURE RAILWAY
P. SIANTAR - LAKE
TOBA

SHIPS OPERATE

546GT (2017-2018)



300GT (2018-2019)



SHIPS DEVELOPMENT

200GT (2019-2020)

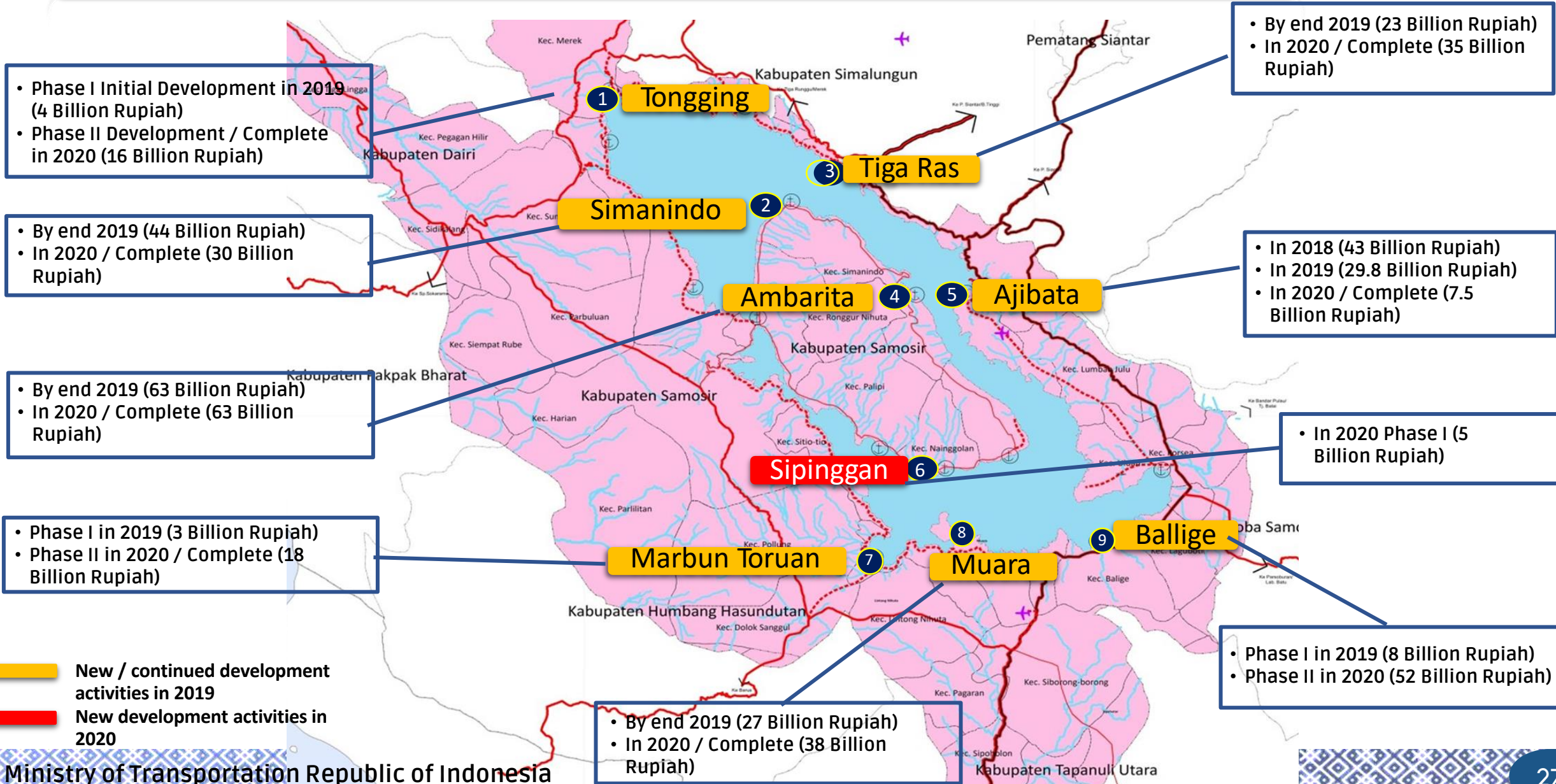


2 BUS AIR (2019-



INFRASTRUCTURE UPDATES

LAKE PIER INFRASTRUCTURES

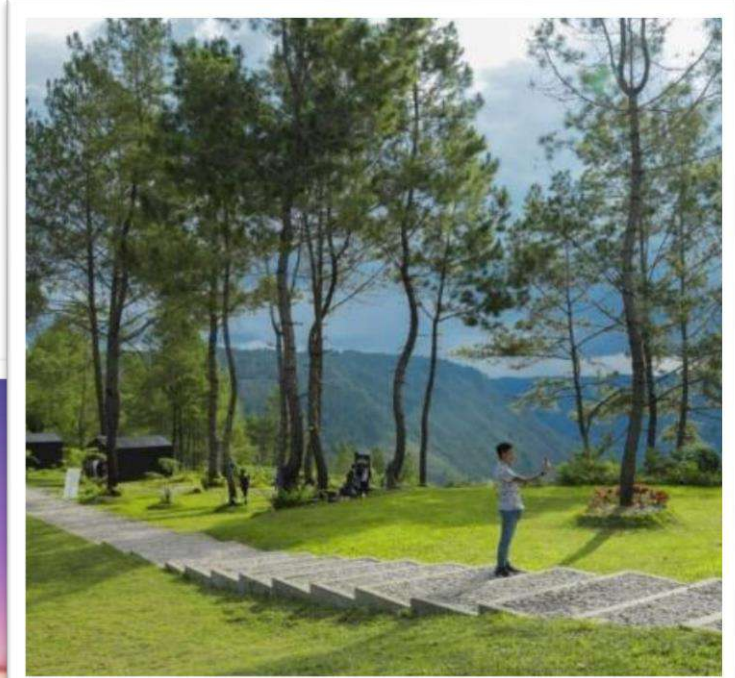


THE KALDERA – TOBA NOMADIC ESCAPE

The name of the “Kaldera” originates from the word “Caldera”, which means the crater formed by volcano eruption.

The Kaldera is a pioneering project initiated by the Lake Toba Tourism Authority that showcases several Nomadic Tourism products in one convenient location, just 5 minutes from Sibisa airport and a short 10-minute cross by boat to Samosir island.

The Kaldera is developed with meticulous planning towards responsible and eco-friendly development. From the very beginning, the team mapped the existing conditions before clearing up the land, and carefully look into the unique characteristics of the land and its natural surrounding, such as pine trees, the coffee plantation and undulating topography. These major elements are well-preserved and maintained to create a strong character to the entire development. Community involvement and empowerment are crucial part of this development as well. The Kaldera is delicately built with the helping hands of three surrounding villages, creating strong bond between local communities and Lake Toba Tourism Authority.





THE KALDERA – TOBA NOMADIC ESCAPE

President's Visit to Lake Toba 29-31 July 2019





GROUNDBREAKING "TOBA CALDERA RESORT" – 14 OCT 2019



Inauguration signing "Toba Caldera Resort" by the Coordinating Minister for Maritime and Investment Affairs



Signing of Conditional Land Utilization and Development Agreement by the President Director of Lake Toba Tourism Authority and investors



Field survey to the southern main road of Toba Caldera Resort



Beating the *gordang sambilan* (drums) to mark the inauguration of Toba Caldera Resort



Mangulosi ceremony (Batak ritual) by tribal elders to the ministers and investors



Groundbreaking ceremony of glamorous camping development by one of the investors

INVESTMENT OPPORTUNITIES



Toba Caldera Resort

Loc.: Toba Samosir Regency
Area : + 386,72 Ha

Integrated Resort “Flower Garden”

Loc.: Humbang Hasundutan &
North Tapanuli Regencies
Area : $\pm 1,247$ Ha

Coordinative Area

Include 8 Regencies
Area: $\pm 300,000$ Ha

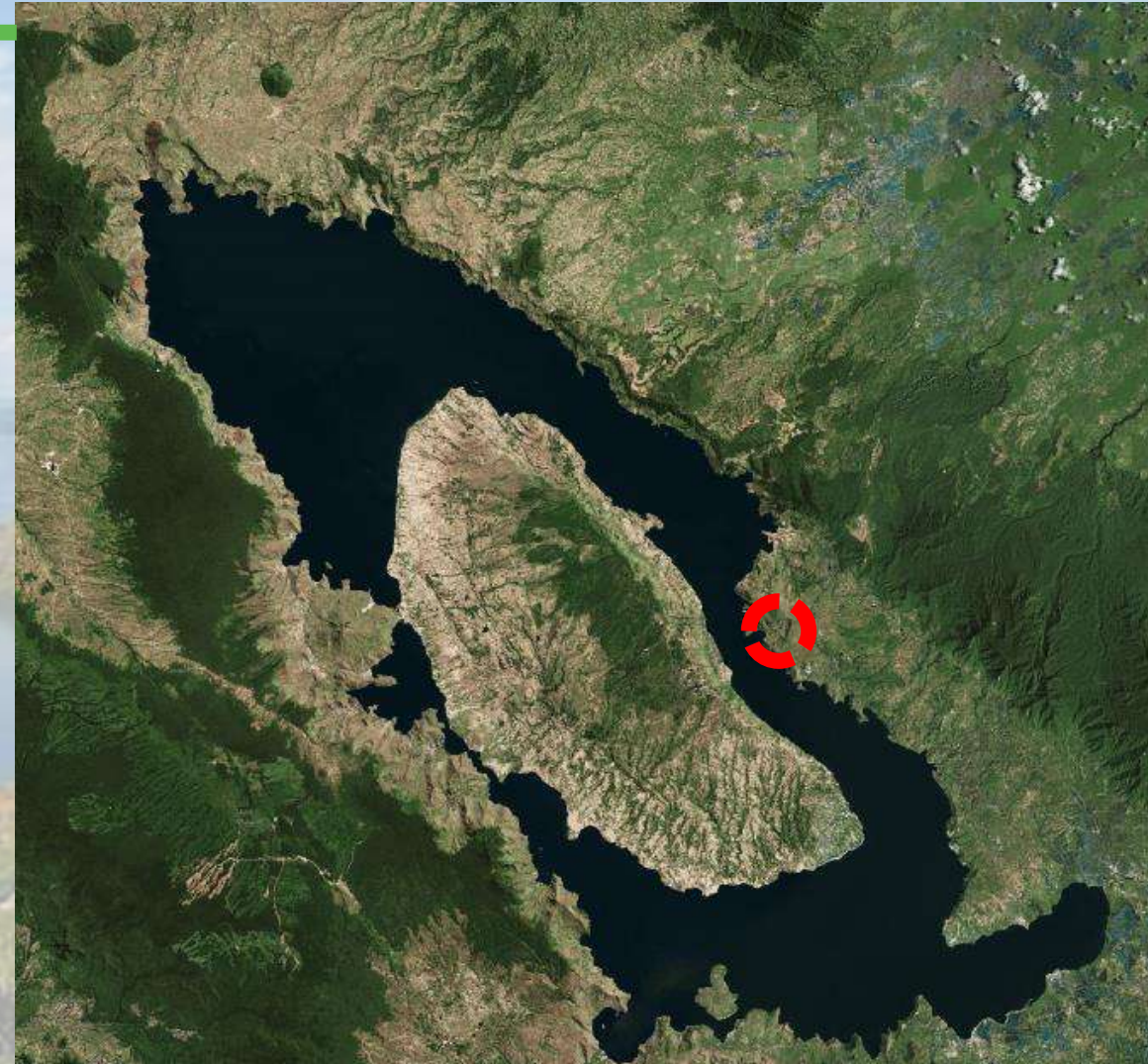
Lake Toba Investment Plan: TOBA CALDERA RESORT

An integrated resort complex located on the cliffs surrounding the naturally sculpted Lake Toba

Resort Concept that incorporate nature, culture and technology into an **Integrated Eco Resort**.

The resort is aimed not only to celebrate its majestic nature, but also to elevate local communities and to rebrand the local wisdom, history, and culture of Lake Toba

It also initiates a cutting-edge, engaging educational experience on the history of Lake Toba, a massive caldera created by a supervolcanic eruption 1.2 million years ago; together with its culturally rich communities that live around lake toba.



Located at the east side of Lake Toba in Ajibata District, Toba Samosir Regency, North Sumatera Province, Indonesia

Branding Concept

To create a unique ecofriendly and sustainable tourism destination in Toba that develops and empowers local communities by integrating technology, diversity, and innovation



Eco Friendly

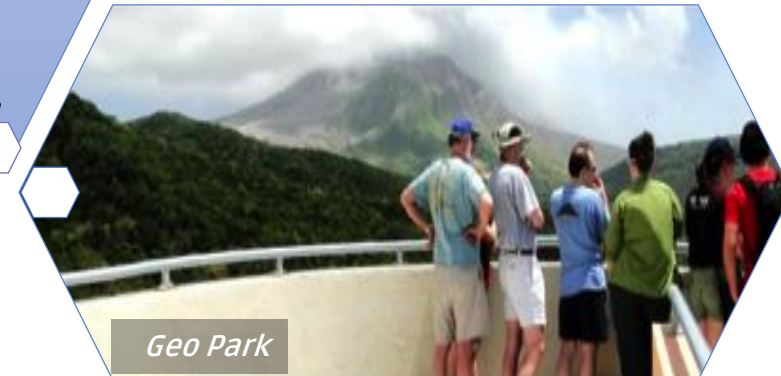
- Nature & Adventure
- Agro & Sustainability
 - Green Activities
 - Education
 - No Plastics
 - Pollution Control
 - Alternative Energy

Community Focused

- Education & Training
- Community Engagement
 - Health & Medical
 - Cultural Shows
 - Local Products

Geo-Park

- UNESCO
 - Education & Mice
 - First In Indonesia
 - Best In Asia
- International Exposure
- 3D Mapping Shows
- Memorable Experiences



Masterplan Concept



Natural Tourism

Marvelous geological attraction
at one of the greatest
supervolcano on earth



Heritage Tourism

Heartwarming Bataknese
cultural & historical pilgrimage
at the heart of North Sumatera



Leisure Tourism

Vibrant and lively creative
villages that enliven the
local economy



Community Tourism

Serene retreating resorts and
lakeside delights at the natural
wonder of Toba Highland



Lake Toba Investment Plan: TOBA CALDERA RESORT



THEMATIC CONCEPT

North Ridge

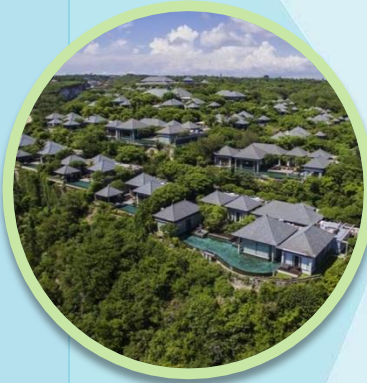
- Serene
- Exclusive
- Wellness

Central Village

- Celebration
- Vibrant
- Integrated
- Cultural

South Ridge

- Leisure
- Adventure
- Active
- Luxury



North Ridge



South Ridge



Central Village

Average of 50 Roomkeys/Ha

TOBA CALDERA RESORT

Land Use Plan

Land use	Total (m ²)	Total (Ha)	%
Hotel/ Resort	1.325.704	132,57	34,38%
Commercial	91.752	9,18	2,38%
Geo Cultural Park	91.941	9,19	2,38%
The Kaldera	22.808	2,28	0,59%
BPODT Office	9.610	0,96	0,25%
Tourism Academy	22.028	2,20	0,57%
MICE	88.706	8,87	2,30%
Healthcare Facilities	13.139	1,31	0,34%
Cultural Centre	19.861	1,99	0,52%
UMKM Centre	9.244	0,92	0,24%
Flower Garden	46.848	4,68	1,21%
Botanical Garden	157.212	15,72	4,08%
Golf	757.789	75,78	19,65%
BOH (Back of House)	18.684	1,87	0,48%
Utilities	69.029	6,90	1,79%
Road	454.295	45,43	12%
Carriage way	142.856		
Median	15.328		
ROW Green Buffer	296.111		
Public Open Space	632.271	63,23	16%
Body of Water	24.943		
TOTAL	3.855.864	386	100%



Thank You

LAKE TOBA
TOURISM
AUTHORITY

Lake Toba Tourism Authority

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