SUMMARY OF FINDINGS
& MARKETING ACTION PLAN

In support of
Consultancy Assignment – Australia/Timor-Leste
Tourism Market Analysis

13 October 2020

ZOIK PTY LTD  ABN: 110 616 781  158 Enoggera Road NEWMARKET Q 4051
Five things we learnt...

1.61 million Australians would like to visit Timor-Leste - page 9

‘Lack of knowledge’ is a major reason agents don’t sell Timor-Leste - page 7

A trade-ready program is vital to support the local industry develop skills and Australian product - page 5

Perceived dangers of “War” and “unrest” are top of mind for a small, yet significant proportion of potential visitors - page 8

Timor-Leste Intenders are heavy internet users. Therefore, a social media plan must focus on: EXCITING, EDUCATING & ENGAGING this market - page 8
Despite its proximity and perceived natural beauty, Timor-Leste remains an undiscovered destination for the Australian tourist market.

There is a lack of understanding of how Australians travel, especially to similarly remote Asia and Pacific destinations like Timor-Leste, which limits how well Timor-Leste can competitively promote itself to the Australian market. Timorese tourism stakeholders would benefit from a better knowledge of what experience Australian tourists want and how to influence their decision-making.

The purpose of this project was to conduct consumer and trade market research to identify ‘most likely’ target segments and activate a Marketing Action Plan to benefit the local tourism industry.

While we could not have foreseen the damaging consequences of COVID-19 on global tourism, the timing of this project provided an opportunity to plan a unique schedule of marketing actions that focus on growing the local industry’s trade contacts and skill base now in preparation for mainstream marketing actions when travel restrictions ease ‘Post-COVID’.

This document provides a summary of the project’s key deliverables:

1. Marketing Action Plan:
   - COVID-19 Response: October - September 2021 5
   - POST COVID-19 Response: October 2021 - March 2022 6
2. Australian Travel Trade Marketing Interviews 7
3. Prospective Visitor Survey 8
4. Media Habits of ‘Timor Intenders’ 9

Please refer to individual reports for more details on the summaries provided.
What do Australians think about Timor-Leste?

“A tiny country, worth visiting because there are no crowds of tourists, difficult past, excellent scuba diving, easily accessible ex Darwin.”
-Derwent, Tas

“A new exciting untouristy destination”
- Beaconsfield, VIC

“Exotic, basic facilities, tropical”
- Paddington, NSW

“Uncrowded; beautiful people; stunning scenery”
- Darwin, NT

“Off the beaten track, beaches, local culture”
- Balmain, NSW

“Not very touristy”
- Brunswick East, Vic

Source: Prospective Visitor Survey, 2020
SUMMARY OF KEY MARKETING ACTIONS

COVID-19 Response: Highlights for October 2020 - September 2021

FOR AUSTRALIAN CONSUMERS

- Prepare and disseminate a statement explaining the local tourism industry’s commitment to COVID Safe Statement.

- Dedicated section on the national tourism site for Australian travellers. Content should be directly relevant to key markets (Melbourne and Darwin) and offer advertising space to promote tours / services ex Australia.

- Implement a Social Content Plan built on three communication pillars:
  1. EXCITE - content to position TL as “authentic, exotic, ‘un-tourist’ destination”
  2. EDUCATE - content that seek to misconceptions about safety and accessibility.
  3. ENGAGE - content that engages the target audience (e.g. reaction posts, video).

- Digital advertising campaign: extend organic reach of social content by boosting posts and promoting on social feeds of target audiences (using geo-data when available). Target: (1) Timor Intenders, (2) Dive market. Channels: Instagram, Facebook, Youtube Instream advertising.

FOR AUSTRALIAN TRAVEL TRADE

- Commence the Trade Ready program for TL local suppliers – online webinars and one-on-one sessions with the trade representative (based in Australia). This will assist with product development and ensuring suppliers are ready to work with trade partners.

- Set-up and commence Facebook group – for local TL suppliers initially.

- Select trade events – to attend or participate in with trade partners.

- Commence weekly trade sales calls – personal calls to check in with key trade partners; find out how things are going, what they may need.

- Commence development of the Trade Portal; determine layout, and develop login or hosting facility on the TL website.

- Determine 4 x key trade media partners to invite on schedule of trade media familis

*Concepts only
SUMMARY OF KEY MARKETING ACTIONS

POST COVID-19 Response: Highlights for October 2021 - March 2022

FOR AUSTRALIAN CONSUMERS

- Expand the Social Content Plan built on three recommended communication pillars: 1. EXCITE, 2. EDUCATE and 3. ENGAGE.
- Feature ‘bookable holidays for Australians’ in social media and eNewsletters.
- Digital advertising to promote travel experiences that will provide a consistent promotion channel for local tourism businesses. Method: Feature one experience per month with associated ‘bookable’ travel products each week during the month. Target: (1) Timor Intenders, (2) Dive market. Channels: Instagram, Facebook, YouTube Instream advertising, Google Ads, Google and Facebook Remarketing.
- Collect Australian visitor postcodes on arrival and departure surveys – this will provide valuable geotargeting information to improve campaign targeting.
- Develop a digitally themed consumer promotion that aims to engage young adventure seeks and provides an opportunity for content creation.

FOR AUSTRALIAN TRAVEL TRADE

- Undertake the first trade famil – group of tier 1 agents (by invitation)
- Complete the “Trade Ready supplier list” with TL suppliers; to distribute to trade partners and load onto the Trade Portal
- Continue Trade Ready online webinars and one-on-one sessions for TL suppliers
- Maintain sales calls, Facebook group and YouTube activities – weekly and monthly
- Ongoing writing and distributing press releases for trade press and partners; and upload to TravMedia – monthly
- Hosted 2 x trade events – proposed to host a trade invite only event in Melbourne and Brisbane
- Coordinate and host media famil to TL – 2 x media
SUMMARY OF KEY FEEDBACK

- For those trade partners that have been to TL or have had groups go to TL; everyone had exceptionally good experiences – no bad experiences were encountered – which is a very positive outcome.

- All trade partners (who have already been selling TL) advised they are keen to continue selling TL – as soon as they can.

- The key reason for so few bookings for trade partners is that no ‘enquiries’ are occurring – ie. there is very low consumer awareness of the country and consumers generally don’t know anything about it.

- All bookings / sales that have occurred are due to the ‘proactiveness’ of the agents; not as a result of consumer demand.

- All feedback trade partners received from visitors / clients who have travelled to TL has been extremely positive.

- A common feedback comment received from clients when they returned from TL was that clients were “very surprised” by the destination – how beautiful the country is and how lovely people and culture is.

- For those agents that have not sold TL – generally they have no knowledge about TL or what it offers visitors; some had not even heard of TL. Some mentioned they had only heard about TL due to the war/political instability – so mentioned ‘safety’ as an area of concern.

- Key obstacles for trade are: lack of tourist information available about TL; no marketing tools or support to help agents sell it; no marketing of TL has occurred; logistical booking procedures (ie. lack of easy booking systems, payment processes, standard rates etc); cost of flights and flight access somewhat a concern – but not overly.

- Tourism development obstacles: lack of local transport options; lack of infrastructure; bad roads; limited product suppliers.

- Generally all trade partners interviewed (except a couple) are keen to obtain more information about TL, to be kept updated on a regular basis, and are keen for any trade famil opportunities (especially those who have never been themselves).

- Overall key selling points: amazing diversity of stunning scenery, pristine marine life / diving, uncommercialised, a ‘new’ off the beaten track destination, untouched and authentic, interesting culture and history, adventure activities.
Key survey findings:

- **13% of respondents would like to visit unprompted.** When prompted, 36% of respondents indicated that they would like to visit Timor-Leste.

- **65% of respondents see Timor-Leste as a naturally beautiful destination.**

- **13% of respondents believe the destination is not safe.** Unfortunately, “War” and “unrest” are top of mind for a small, yet significant proportion of potential visitors.

- Respondents who have visited New Zealand are significantly less likely to visit Timor-Leste compared to those who have not visited New Zealand recently. This presents as a key point of difference for messaging.

**PERCEPTION OF TIMOR-LESTE**
n = 507

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A safe destination</td>
<td>60%</td>
</tr>
<tr>
<td>An expensive destination</td>
<td>5%</td>
</tr>
<tr>
<td>A friendly destination</td>
<td>76%</td>
</tr>
<tr>
<td>A destination of historical interest</td>
<td>60%</td>
</tr>
<tr>
<td>A destination offering adventure</td>
<td>36%</td>
</tr>
<tr>
<td>A naturally beautiful destination</td>
<td>42%</td>
</tr>
<tr>
<td>A destination that is easy to get to</td>
<td>77%</td>
</tr>
</tbody>
</table>

**ACTIVITIES THAT WOULD ATTRACT AUSTRALIANS**
n = 168 - includes only respondents who indicated they would like to visit Timor-Leste

<table>
<thead>
<tr>
<th>Activity</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boat trip to outer islands</td>
<td>54%</td>
</tr>
<tr>
<td>Small group cultural tour</td>
<td>31%</td>
</tr>
<tr>
<td>Hiking and bushwalking</td>
<td>37%</td>
</tr>
<tr>
<td>Relaxing beach holiday</td>
<td>24%</td>
</tr>
<tr>
<td>Shopping at local craft markets</td>
<td>29%</td>
</tr>
</tbody>
</table>

**PROFILE OF CURRENT AUSTRALIAN VISITORS**

Date extracted from interviews conducted by The Asia Foundation with travellers in the departure lounge of Dili International Airport in 2017 and 2018, shows:

- **Darwin is the largest source market, accounting for one in four (25%) Australian holidaymakers.**

- 'Going to the beach' was the most popular activity planned by Darwin visitors, while 'Cultural experiences' ranked highest for Melbournians.

- Visitors who came to dive were great advocates for Timor-Leste; 97% would recommend the destination to friends and family.
TARGETING “TIMOR INTENDERS”: 1.61m Australians

WHO ARE ‘TIMOR INTENDERS?’
‘Timor-Leste intenders’, a custom segment created by matching the location and socioeconomic status of respondents to the Prospective Visitor Survey, conducted in February 2020, to RDA’s geoTribes socioeconomic segments. Based on the research, a Timor Leste intender audience was defined as the summation of the Crusaders and Independents geoTribes segments.

Where do Timor Intenders Reside?
Top 10 Postcodes of Timor Intenders in Australia:
- 3000 - Melbourne  36,705
- 2000 - Sydney    19,164
- 2017 - Waterloo  18,793
- 3121 - Richmond  17,690
- 3006 - Southbank 16,930
- 2010 - Surry Hills 16,763
- 2026 - Bondi Beach 16,650
- 2150 - Parramatta 16,649
- 3141 - South Yarra 16,626
- 3056 - Brunswick 14,460

Population of Timor Intenders in Australia  
1,610,315
% Total population: 6.4%

The data above has been extracted from a list of the top 200 postcodes for Timor Intenders which can be used for geo-targeting campaigns (as shown in the map).

DIGITAL MEDIA USAGE
Timor-Leste Intenders are heavy internet users that are also big on social media, but less likely to be attracted by mass media. 91% are on Facebook and 65% are on Instagram. Overlaying postcode data can provide a cost efficient method of reaching this market on social media and targeted local cinema advertising.

In an average week, more than one in three (36%) Timor-Leste intenders will be making travel arrangements online. This underscores the importance of digital channels for engaging Timor-Leste intenders.