

SUMMARY OF FINDINGS & MARKETING ACTION PLAN

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

10 September 2020

ZOIK

ZOIK PTY LTD ABN: 110 616 781 158 Enoggera Road NEWMARKET Q 4051

 **Palladium**
MAKE IT POSSIBLE

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

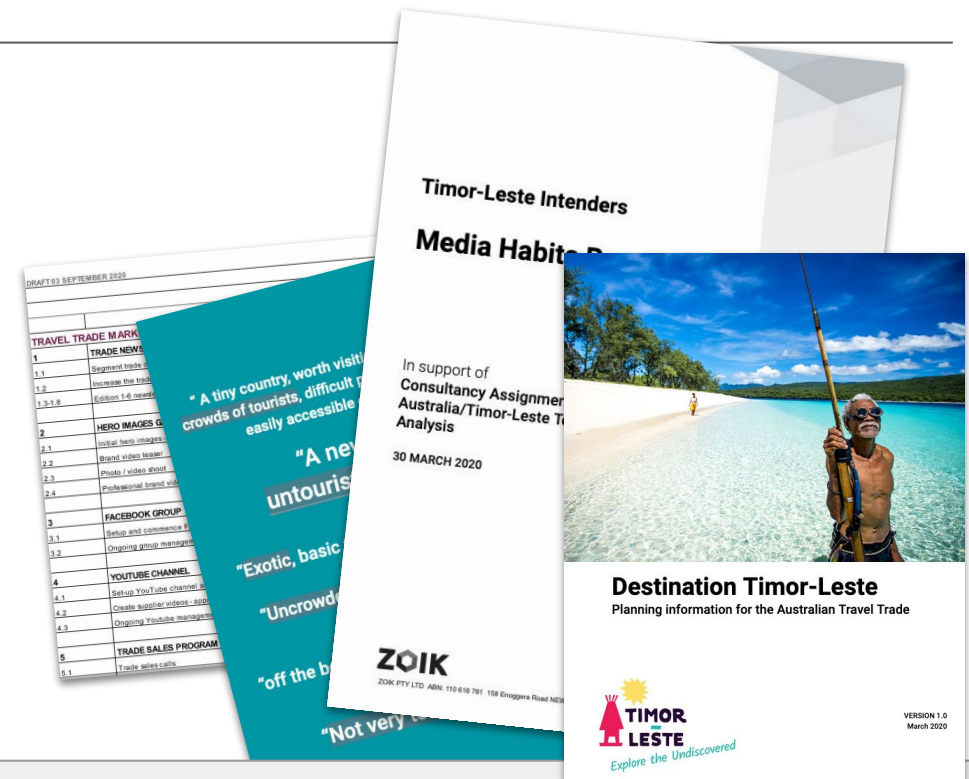
OVERVIEW

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

SUMMARY OF KEY MARKETING ACTIONS

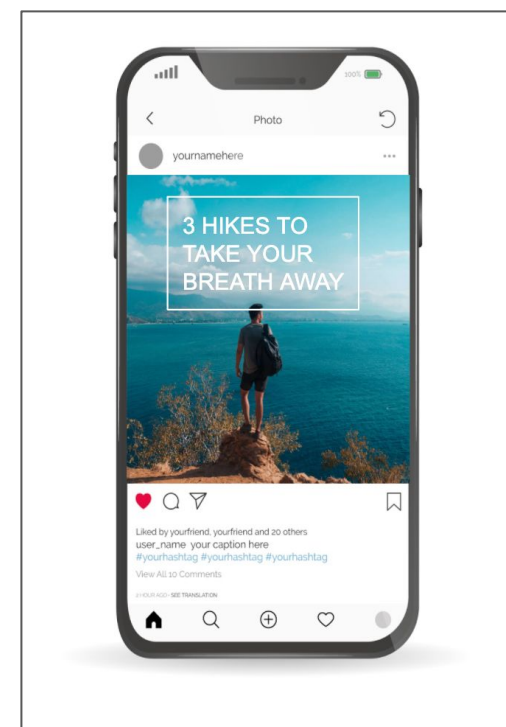
COVID-19 Response: Highlights for October 2020 - September 2021

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 famils**



*Concepts only

SUMMARY OF KEY MARKETING ACTIONS

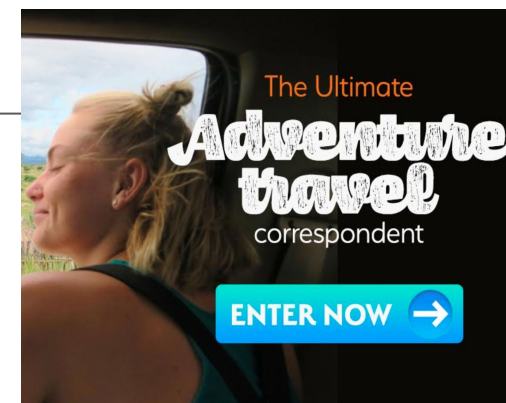
POST COVID-19 Response: Highlights for October 2021 - March 2022

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 seekers 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 famils** to TL – 2 x media



AUSTRALIAN TRAVEL TRADE INTERVIEWS

Refer to full report
for more details.

Interviews conducted by phone, video conference and email, March - August 2020

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 family 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.

PROSPECTIVE VISITOR SURVEY

Refer to full report
for more details.

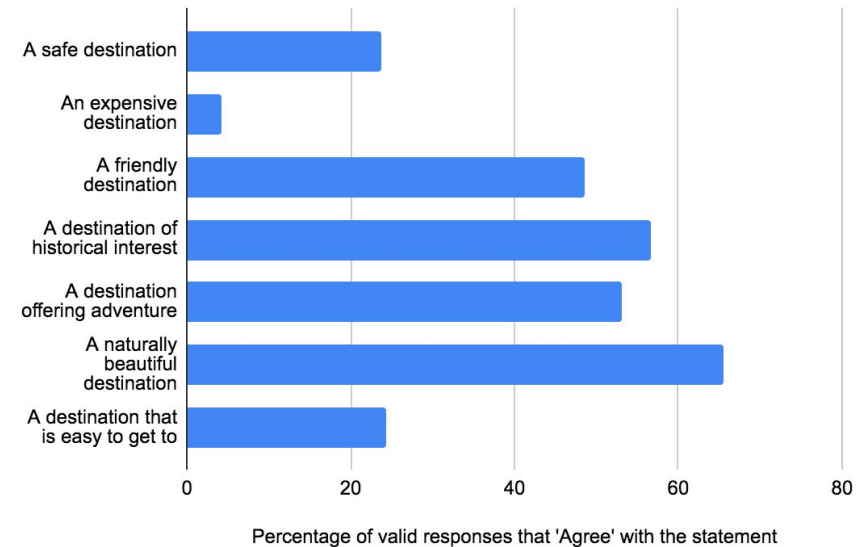
Online visitor intention survey, 05/02/20 - 21/02/20.

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.

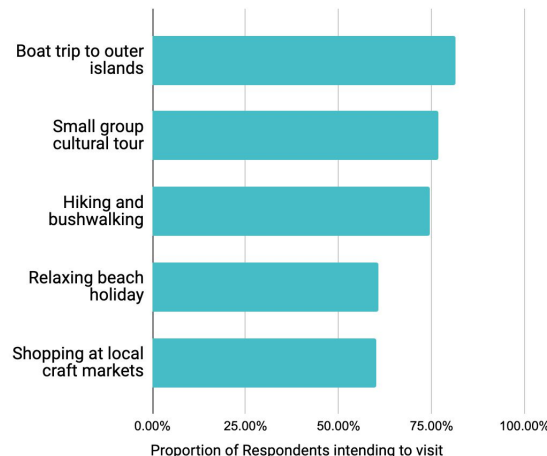
PERCEPTION OF TIMOR-LESTE

n = 507



ACTIVITIES THAT WOULD ATTRACT AUSTRALIANS

n = 168 - includes only respondents who indicated they would like to visit Timor-Leste



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

Refer to full report for more details.

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?

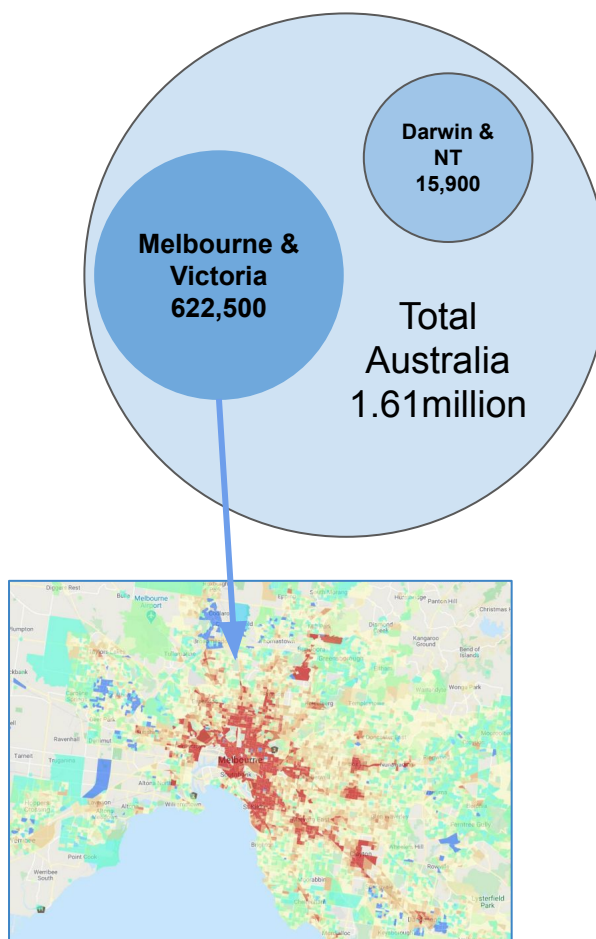
Top 10 Postcodes of Timor Intenders in Australia:

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).

TIMOR INTENDERS MARKET SIZE ESTIMATE



Postcode mapping of Timor-Intender residents in Melbourne

**RDA
RESEARCH**
geoTribes

DIGITAL MEDIA USAGE

Timor-Leste Intenders are heavy internet users that are also big on social media. 91% are on Facebook and 65% are on Instagram. Overlaying postcode data should provide a cost efficient method of reaching this market on social media.



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.