



2014 Survey of Travelers to Timor-Leste



The Asia Foundation



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About The Asia Foundation

The Asia Foundation is a non-profit international development organization committed to improving lives across a dynamic and developing Asia. Informed by six decades of experience and deep local expertise, our programs address critical issues affecting Asia in the 21st century—governance and law, economic development, women's empowerment, environment, and regional cooperation. In addition, our Books for Asia and professional exchange programs are among the ways we encourage Asia's continued development as a peaceful, just, and thriving region of the world.

Headquartered in San Francisco, The Asia Foundation works through a network of offices in 18 Asian countries and in Washington, DC. Working with public and private partners, the Foundation receives funding from a diverse group of bilateral and multilateral development agencies, foundations, corporations, and individuals. In 2013, we provided nearly \$114 million in direct program support and distributed textbooks and other educational materials valued at over \$10 million.

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Foreword

Despite ongoing economic improvements in Timor-Leste including an 8% growth in non-oil GDP and numerous major road and other infrastructure developments, the vast majority of the economy is still fueled by the nation's petroleum reserves. According to Asian Development Bank data, royalties from off shore oil production (including taxes) in the first half of 2014 accounted for nearly 75% of the government's revenue.³ Some good news includes the fact that inflation has declined from double digit levels, and heavy reliance on imports has declined slightly in the first half of 2014. These improvements notwithstanding, Timor-Leste desperately needs to diversify its economy and in particular focus on strengthening non-oil economic sectors to ensure sustainability beyond the life of the Petroleum Fund, the nation's current life line. Of these non-oil economic sectors, the two that feature most prominently are coffee production and tourism.

Coffee remains the second largest Timorese export, after oil. In this sector, Timor-Leste has had some success in establishing its brand as a high-end shade-grown, organic product, exported mainly to markets in the United States and Europe. Notably, Seattle-based coffee giant Starbucks recently announced it would add a "Mount Ramelau" single origin coffee to its lineup. That being said, coffee exports presently account for only \$US15.8 million or approximately 1% of the annual budget, and is unlikely to grow to a significant portion of GDP due to vulnerability to climate shocks which may affect yield consistency.

Accurate information about tourism on the other hand, is much harder to come by. A recent ANZ quarterly update⁴ which featured a special report on tourism in a range of Pacific islands, confirmed this when it listed the contribution of tourism in percentage points to the Timorese GDP as "n/a" (compared to 13% for the Solomon Islands and 40% for Fiji respectively). The circular did however allude to the high cost of travel to Timor-Leste, listed as \$1,417 from Sydney (nearly twice the price to PNG and by far the most expensive of all the pacific island nations listed), as hindering Timor-Leste's competitive stance as a travel destination in the region.

And yet, as clearly outlined in the country's Strategic Development Plan, developing the tourism industry is essential to the future development of Timor-Leste. Not only is it critical for its regional integration, but could play an essential role in diversifying the economy, providing relatively low-skilled employment, and bringing revenue and income earning opportunities to potential tourism sites throughout the country. The Foundation acknowledges the important work that many multilateral and bilateral partners and institutions have already contributed to this field, and does not consider itself the authority in this sector. We present this particular body of work as a contribution to the growing discourse around the tourism industry in Timor-Leste, and trust that it may be of some use to local and international stakeholders interested and engaged in this work.

Through this research, The Asia Foundation (the Foundation) is attempting to gather more accurate tourism data directly from people who travel to Timor-Leste. For over twenty years, the Foundation has worked alongside civil society, government and other stakeholders to gain a better understanding of the challenges and opportunities facing Timor-Leste. Throughout this history, the Foundation has adapted to provide timely and relevant research, analysis and interventions, alongside our Timorese counterparts. This research is no different. What started out as a conversation with a department in the Ministry of Tourism, has resulted in the acquisition of valuable data to help inform the Ministry and other policy makers as they craft the most appropriate and realistic path forward for this nascent, though important industry.

This research is by no means comprehensive, and should be seen as a first step for the Foundation in

3 <http://www.adb.org/countries/timor-leste/economy>

4 ANZ Quarterly February 2014

grappling with the various barriers, considerations and gaps which exist to strengthening and developing this sector. Our intention is to follow up with a domestic tourism survey in order to better calculate the complete contribution of travel-related expenditures to the economy in Timor-Leste.

This publication would not have been possible without the generous support of our development partners. For the past two years, the Australian Government through its foreign assistance support to Timor-Leste, has allowed the Foundation the space and freedom to engage in interesting, timely and important policy areas. As a donor, they recognize the need to increase understanding of key challenges, and the importance of evidence-based policy making. We are grateful for their flexible and iterative approach.

Finally, and most importantly, to our dedicated partners within government, civil society and the private sector, we commend you for your continued commitment to reform and look forward to playing whatever small part we may along the road to prosperity in Timor-Leste.

Susan Marx
Country Representative
The Asia Foundation, Timor-Leste

Executive Summary

The development of an international tourism industry is crucial if Timor-Leste is to diversify avenues for economic growth, and reduce its reliance on oil. The Government of Timor-Leste's Strategic Development Plan identifies tourism as one of five sectors critical to the country's economic development and one that can spark private sector industries that earn export dollars. Despite this, there exists a current dearth in available data relating to traveler experiences that could otherwise inform those responsible for policy formation.

With funding from the Australian Department for Foreign Affairs and Trade (DFAT), The Asia Foundation is implementing the Support for Good Public Policy (SGPP) program in Timor-Leste. One of the program's key objectives is the enhancement of national capabilities for good public policy through empirical study.

Through this program and in light of the aforementioned challenges, a partnership between The Asia Foundation and the Ministry of Tourism, allowed for a survey of travelers to Timor-Leste to be conducted from May - July 2014. This survey collated perceptions from over 700 respondents following their travel in Timor-Leste. The survey findings create a much-needed evidence base of traveler needs and interests, so that those responsible for shaping the country's tourism policy are informed and empowered to lead the sector forward.

The research shows that the majority of travelers to Timor-Leste arrive from Australia, Indonesia and Portugal, with the primary reason for traveling to Timor-Leste being for work and business purposes. A minority of travelers to Timor-Leste visit for primarily holiday purposes.

Contrary to popular means of travel planning to global tourist destinations, prior to arrival in Timor-Leste, the majority of travelers relied on word-of-mouth recommendations to inform them ahead of their trip. Synonymous with the lack of available information online and in traditional media sources, relatively low proportions of respondents found enough information for their travels even once they were in Timor-Leste.

When visiting Timor-Leste for leisure purposes, travelers indicate high levels of satisfaction towards activities relating to Timor-Leste's biodiversity, history, and culture, as well as adventure-based activities such as hiking and mountain biking. Additionally, the majority of travelers find leisure activities in Timor-Leste to be value for money. Despite this, almost half of travelers to Timor-Leste believe transport is not value for money. Such findings are compounded by only a third of respondents describing the country's infrastructure as being either 'good' or 'very good' for their ability to travel.

Drawing on expenses relating to transport, accommodation, leisure activities, and food, the research estimates the average expenditure of a traveler visiting Timor-Leste to be US\$638 per trip. By applying weights to the analysis and inclusion principles to deduce the research sample population, it can be projected that the annual economic value-add by travelers who have participated in leisure travel during their visit to Timor-Leste to be approximately US\$14.6 million.

Methology

On March 27, 2014, a Memorandum of Understanding (MoU) was signed between The Asia Foundation and The Ministry of Tourism. The MoU aimed at strengthening the capacity of the Ministry of Tourism to create and effectively use evidence-based research and analysis in planning and policy.

Following a period of research in which best practice from various country case studies and numerous experts were consulted, over thirty different indicators were defined and organized into a structured questionnaire, and electronically coded onto tablet interfaces. By utilizing digital technology to store the surveys onto tablets, the survey questionnaire co-existed in five different languages (English, Bahasa Indonesia, Portuguese, Mandarin Chinese, and Tetum), such that the full gamut of travelers to Timor-Leste could be engaged.

The Foundation hired two multi-lingual enumerators to conduct the survey in the departure hall of the Nicolau Lobato International Airport in Dili. The enumerators were accompanied by three staff members from the National Directorate of Planning and Development at the Ministry of Tourism, who were trained in data collection skills and questionnaire familiarization. The enumerators were tasked to identify valid respondents to complete the computer-assisted self-interview survey. Following a pilot data collection phase during the month of May, a total of 1,666 individuals departing Timor-Leste were approached for interview in the departure lounge of the airport for a period of one week per month during the months of June and July 2014. Applying a methodological inclusion strategy that determined each respondent's eligibility as a 'traveler'³ under the research criteria⁴, a final sample size of 710 respondents was deduced.

Responses were collected using Samsung Galaxy tablet computers which digitally aggregated responses to the questionnaire onto an online open-source data collection cloud system, Formhub, which was wirelessly linked to the tablet survey interfaces. Use of this technology enabled all data to be accessed remotely from The Asia Foundation's office. This allowed for real-time monitoring of the data collection process, and trend analyses for quality control purposes. Upon completion of the data collection process, frequency, cross tabulations and econometric analyses were completed using a combination of SPSS and Excel software.

Demographics

Of the respondents, thirty-nine percent were Australian, 16% were Indonesian and 9% were Portuguese. The majority of travelers interviewed identified their current place of residence as Australia (34%), almost one in four respondents currently reside in Timor-Leste (24%) and 15% reside in Indonesia. Of those residing in Australia, 34% live in Darwin and 27% live in Melbourne, whilst 13% live in Australia's most populated city, Sydney.

Of the total respondents included in the survey, 39% were female, and 61% were male. Almost half (49%)

3 The 'International Recommendation for Tourism Statistics' (UNWTO, 2008, para 2.4) defines a traveler as "someone who moves between different geographic locations for any purpose and any duration". Retrieved from: <http://unstats.un.org/unsd/trade/IRTS/IRTS%202008%20unedited.pdf>

4 For the purpose of this research and to align with internationally recognized definitions, travelers were determined as individuals over the age of 17 who were either (i) foreign nationals residing abroad; (ii) foreign nationals residing in Timor-Leste; or (iii) Timorese nationals residing abroad. From this sample, only respondents who had travelled within Timor-Leste for leisure purposes during their current trip or in the past year, were identified as valid respondents to participate in the survey.

of respondents were aged between 25 and 44 years of age. A relatively low proportion of respondents were aged 17-24 (10%) or over the age of 65 (6%).

Forty-one percent of respondents traveled to Timor-Leste with family, and 19% of these respondents traveled with children. More than a third (35%) of respondents traveled alone, while only 4% of respondents traveled as part of a tour group.

Arrival and Departure Information

A similar proportion of respondents arrived in Timor-Leste from Denpasar (42%) as those arriving from Darwin (39%). Less than one in five (16%) respondents arrived from Singapore. Traveling to Timor-Leste appears to be relatively hassle-free with only seven percent of arrivals reporting that they encountered problems, of which the most common issues reported were cost of visa (19%), travel delays (10%) and issues relating to immigration regulations (8%).

When respondents were asked the destination of their departing flight out of Timor-Leste, almost half (49%) were traveling to Denpasar. Thirty-five percent were travelling to Darwin, and 14% indicated travel to Singapore.

Of travelers interviewed, 29% identified the length of their stay in Timor-Leste as being greater than three months, while 47% stayed for less than two weeks.

The majority of respondents were return visitors, with 60% indicating that they have visited Timor-Leste in the past, while 40% indicated they were visiting Timor-Leste for the first time. Of those that had traveled to Timor-Leste before, more than half (55%) had traveled to Timor-Leste more than three times prior to their current trip.

Reasons for Travel to Timor-Leste

Respondents were asked to identify their primary reason for travel to Timor-Leste. More than half of respondents (56%) traveled to Timor-Leste for work, meetings or business-related activities.

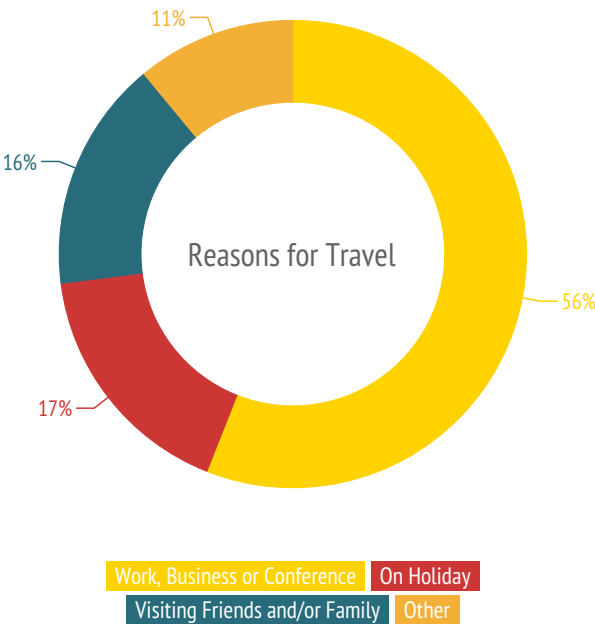


Figure 1. Reasons for travel to Timor-Leste

One in three (34%) respondents traveled to Timor-Leste for work (including paid work, unpaid work, volunteer work and/or aid work), 15% traveled for business and 7% traveled to attend conferences or meetings. Only 17% traveled to Timor-Leste purely for holiday purposes, while a similar proportion of respondents traveled to visit friends and/or family (16%).

Of those respondents that had traveled to Timor-Leste for work, 46% indicated a long-term work commitment in Timor-Leste (for a period greater than six months), while 28% had traveled to Timor-Leste as volunteers. Almost two out of three (62%) travelers who had a long-term work commitment indicated that friends or family (from overseas) had visited them while they resided in Timor-Leste, while a third of volunteers (34%) indicated the same.

When asked about their occupation, 26% of respondents either managed their own business, or were self-employed, while 21% worked for a private company. A much smaller percentage of respondents either worked for international or local non-governmental organizations (NGOs) (8%), and a similar proportion identified themselves as volunteers (6%).

Although only 16% of respondents identified visiting friends and/or family as their primary reason for travel to Timor-Leste, the majority of respondents (78%) indicated that they met people previously known to them, during their visit.

Pre-arrival Information and Travel Intentions

Prior to arrival, three out of four travelers (75%) relied on word-of-mouth recommendations to inform them ahead of their trip to Timor-Leste. This included half of respondents (51%) who found information about Timor-Leste from friends and/or family living in Timor-Leste, and 24% of respondents who sought information from work colleagues.

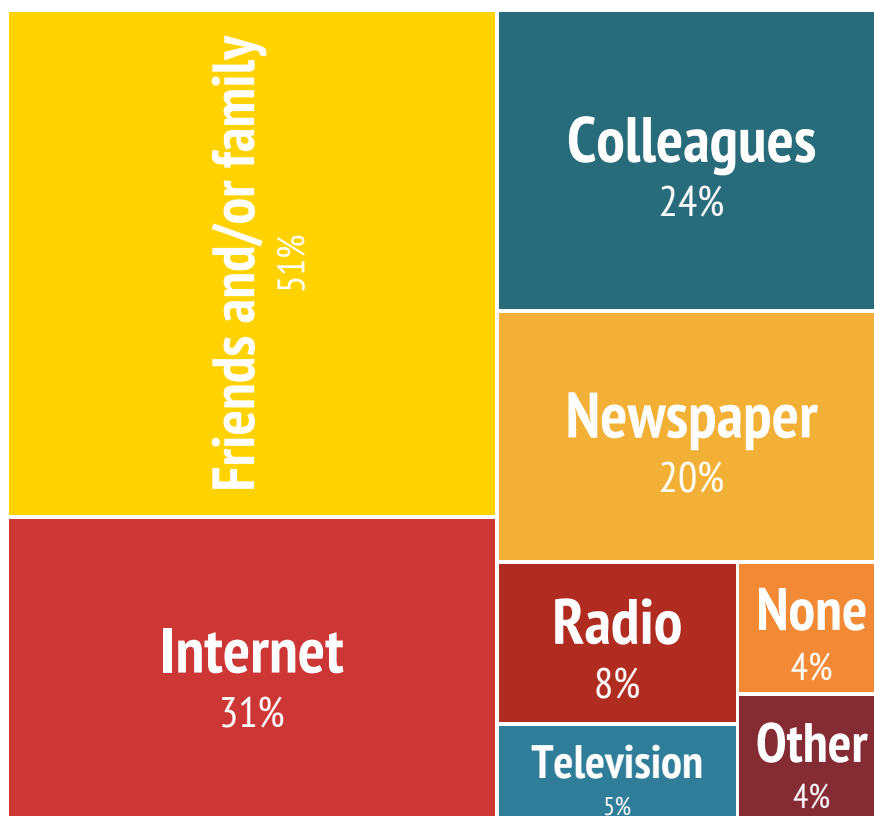


Figure 2. Sources of information about Timor-Leste, prior to arrival

A third (31%) of respondents found information about Timor-Leste from the internet, while traditional media sources informed much smaller proportions of travelers (Television 5% and Radio 8%). One in four respondents (25%) reported that the amount of information they found about Timor-Leste was inadequate for their travels.

To compound such findings, when respondents were asked whether they could find enough information about their travels once they were in Timor-Leste, almost a third (31%) of respondents said they could not.

Reflecting on a period prior to arrival, respondents were asked to identify their intended leisure activities while in Timor-Leste.

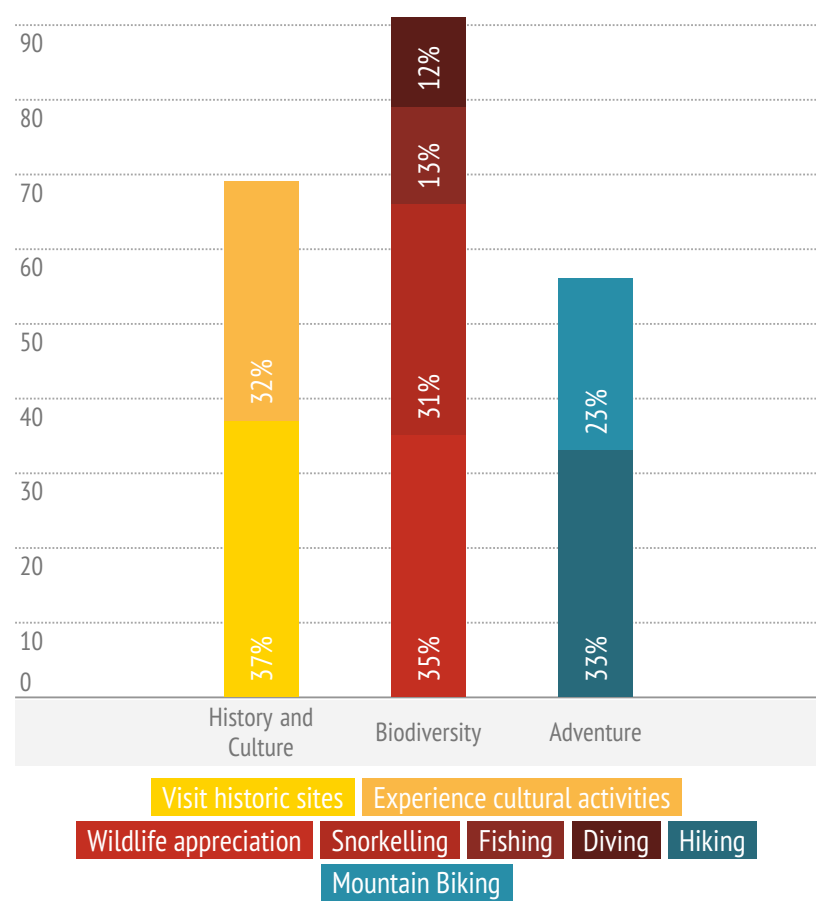


Figure 3. Intended activities in Timor-Leste, prior to arrival

The vast majority of respondents (91%) indicated they would participate in activities relating to Timor-Leste’s biodiversity. This included 35% of respondents who nominated wildlife appreciation, 31% snorkeling, 13% fishing and 12% scuba diving. Sixty-nine percent of respondents had intended to visit historical sites and experience cultural activities, while adventure-based activities of hiking and mountain-biking were nominated by over half of respondents as intended activities (56%).

Only one in five respondents (23%) made bookings for their activities prior to arrival, of which almost equal proportions utilized travel agents (27%) or friends/family members in-country to make the reservation for them (26%). Only 14% made their reservation through online booking forms.

Traveler Experiences in Timor-Leste

When traveling for leisure throughout Timor-Leste, the most popular destinations to visit (47%) were Liquiçá followed by Dili (43%). However, when looking beyond the nation's capital and removing respondents traveling to, or remaining in Dili from the analysis, the distribution of travelers to destinations beyond Dili, is as follows:

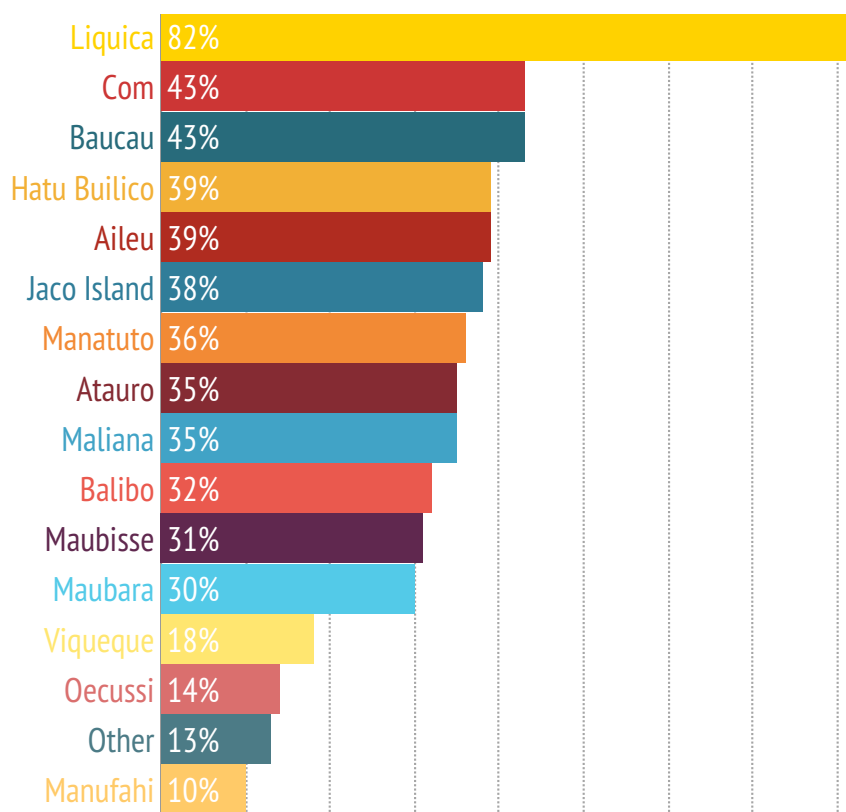


Figure 4. Overall leisure travel within Timor-Leste (excl. Dili)

When traveling for leisure beyond Dili, the most common destination is Liquiçá. Interestingly, Maubara, which hosts a historic fort and is located less than 20km from Liquiçá was visited by only 30% of respondents.

In addition to providing an indication towards overall leisure travel within Timor-Leste, respondents were also asked to reflect on their *most recent* trip in the past one year for leisure purposes only⁵. The results show that when traveling for leisure during their most recent trip, half of respondents either traveled to or remained in Dili (50%). Interestingly, when respondents who traveled to or remained in Dili during their most recent trip are removed from the analysis, the most popular destination for travel was Atauro (23%), followed by Liquiçá (13%) and Baucau (9%). While reflecting on all travel in the past year, respondents show a significant preference to travel to Liquiçá. However, when traveling on their most recent trip, a greater proportion of respondents indicate travel to Atauro. Such observation may be due to growing popularity of Atauro as a destination for travelers.

Transport

When traveling for leisure in Timor-Leste, only 20% of respondents used rental vehicles as their primary mode of transport. In contrast, thirty-nine percent of respondents used a personal, friend's, or family

⁵ To maintain consistency with the research method and participant inclusion principles, respondents were advised not to allude to travel completed for work or business purposes.

member's vehicle for transport. Similarities were observed for respondents who traveled within Dili only. Of respondents who remained in Dili, 35% of respondents used a personal, friend's or family's vehicle for transport, while only 18% used rental vehicles.⁶ When asked about the use of public transportation systems in Dili, 20% of respondents traveled within Dili primarily using taxis, while only 3% used buses or mikrolets.⁷

Respondents who did not use work vehicles, vehicles owned by friends/family or personally owned vehicles were subsequently asked to rate their satisfaction and expenditure towards their chosen mode of transport.

Overall, 79% of respondents were satisfied with their chosen transport option. Of those who used rental vehicles, 86% of respondents were satisfied with their mode of transport, while almost a third of respondents (34%) who traveled using taxis indicated that they were unsatisfied.⁸

Overall, the average cost associated with paid transport during a respondent's last leisure trip within Timor-Leste was US\$151. When asked to rate their expenditure, only 57% of respondents believed this to be 'value for money'.

Accommodation

When traveling for leisure in Timor-Leste, a third (33%) of respondents used hotels for accommodation. Almost one in four (24%) respondents used private rentals or the houses of family and/or friends, while only 4% of respondents used *pousadas*.⁹

Respondents who did not stay at a family or friend's house or private rentals were asked to rate their satisfaction and expenditure towards their chosen type of accommodation.

Overall, the majority of respondents (84%) were satisfied with their chosen accommodation. An even higher percentage of respondents (90%) were satisfied with their stay at eco-resorts and campsites.¹⁰ Of travelers who were less satisfied with their experience, only 64% were satisfied with their stay at backpacker hostels, while 79%¹¹ were satisfied with their stay at *pousadas*.

Overall, the average cost associated with paid accommodation during a period of leisure travel within Timor-Leste was US\$192. When asked to rate their expenditure, 28% of respondents described this as 'not value for money', while 62% described this as 'value for money'.

Leisure Activities

While the survey questionnaire asked respondents to list all the locations they had traveled to within Timor-Leste, an additional series of questions was asked in relation to their last trip made for leisure purposes only. Within this context, the most common activity was beach leisure, reported by more than one in three respondents (36%). Experiencing cultural activities (11%), hiking (10%) and visiting historic sites (10%) was reported as the primary activity during travel for similar proportions of respondents.

6 It is important to note here that by cross-tabulating analyses within the survey, the resulting sample size decreases significantly, while the margin of error increases exponentially. As such, percentages are used here only as a general indication, and are not necessarily representative of the overall sample.

7 Ibid.

8 Ibid.

9 Pousadas are hotels that were built while Timor-Leste was under Portuguese control. Today, the majority of Timor-Leste's pousadas are administered by the Government.

10 It is important to note here that by cross-tabulating analyses within the survey, the resulting sample size decreases significantly, while the margin of error increases exponentially. As such, percentages are used here only as a general indication, and are not necessarily representative of the overall sample.

11 Ibid.

Overall, almost all respondents (94%) were satisfied with the leisure activities they participated in. Respondents were also asked whether they had experienced arts and culture while traveling in Timor-Leste. Of the 54% that indicated they had, a vast majority (97%) found Timorese arts and culture to be an enjoyable experience.

Due to the majority of respondents identifying activities such as beach leisure (36%), hiking (10%) and snorkeling (8%), the associated cost of leisure is relatively low. During a period of leisure travel, the average cost associated with leisure activities is US\$99. When asked to rate their expenditure, 77% of respondents believe this to be ‘value for money’.

Culinary Experiences

During the last trip made for leisure purposes, only 55% of respondents intentionally sought out a culinary experience involving local dishes and ingredients. Despite this, 86% of respondents showed satisfaction towards food and food-related activities.

The average expenditure towards food and food-related activities while traveling for leisure in Timor-Leste is US\$197, with almost one in four (24%) respondents describing this as ‘not value-for-money’. Conversely, 69% of respondents believed it to be ‘value-for-money’.

Overall Reflections

Respondents were asked to reflect on three distinct indicators relating to hospitality, security and infrastructure in the context of overall leisure travel within Timor-Leste, and were asked to rate levels of satisfaction towards each accordingly.

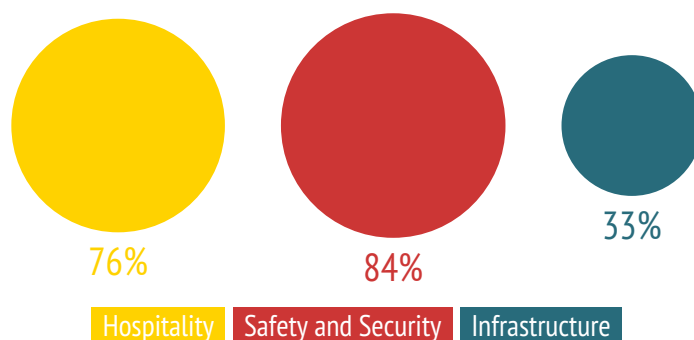


Figure 5. Positive ratings towards hospitality, safety and infrastructure, following a period of travel

Three quarters of respondents rated hospitality/customer service as either ‘good’ or ‘very good’ (76%), whilst 84% of respondents rated personal safety and security as either ‘good’ or ‘very good’. Only 33% of respondents rated infrastructure, in relation to the ability to travel for leisure, as either ‘good’ or ‘very good’.

Despite such negative perceptions towards infrastructure, an overwhelming proportion (83%) of respondents stated that their overall travel experience in Timor-Leste met their expectations. When asked whether respondents would recommend Timor-Leste to their friends, 79% of respondents believed they would. When respondents were asked to identify the three main attractions that would encourage friends or family to visit, they indicated experiencing cultural activities (25%), beach leisure (25%) and visiting historical sites (23%).

Travel Expenditure & Economic Contributions

Based on a sample population of 710 travelers to Timor-Leste, an estimate can be made towards the economic contribution of tourism.

All respondents who traveled to Timor-Leste for leisure purposes were asked to provide a break-down of the nature of their expenses. Drawing on expenses relating to transport, accommodation, leisure activities, and food, a respondent's average cost per trip was as follows:

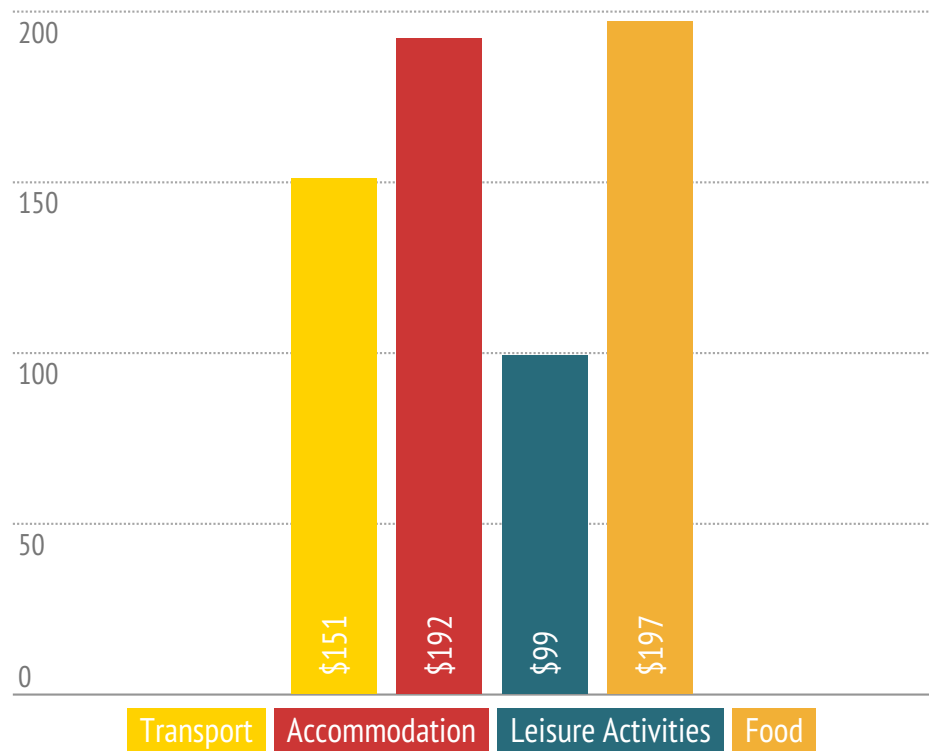


Figure 6. Average traveler spend, per trip

By weighting the economic analyses to account for varying spending patterns between respondents who traveled to Timor-Leste for less than three months (71%) and those that traveled for more than three months (29%), the weighted average expenditure of a traveler visiting Timor-Leste is US\$638.

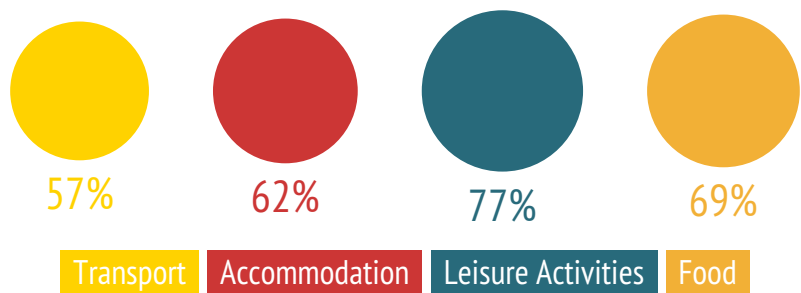


Figure 7. Satisfaction towards economic indicators relating to leisure travel in Timor-Leste

Applying similar weights to responses towards satisfaction levels for each of the four expenditure indicators found that overall, 65% of respondents believed their expenditure to be ‘value for money’.

In the first half of 2014, Timor-Leste experienced 28,343 airport arrivals.¹² Utilizing the inclusion principle of our research,¹³ and projected airport arrivals for 2014¹⁴ it can be deduced that the estimated average annual economic value-add by travelers to Timor-Leste is approximately US\$14.6 million.¹⁵

The United Nations World Tourism Organization (UNWTO), however, defines a visitor as a “traveler taking a trip to a main destination outside his/her usual environment, for less than a year,¹⁶ for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited”. These trips taken by visitors qualify as tourism trips. Tourism refers to the activity of visitors.¹⁷ As such, the economic contribution of ‘visitors’ to Timor-Leste is as follows:

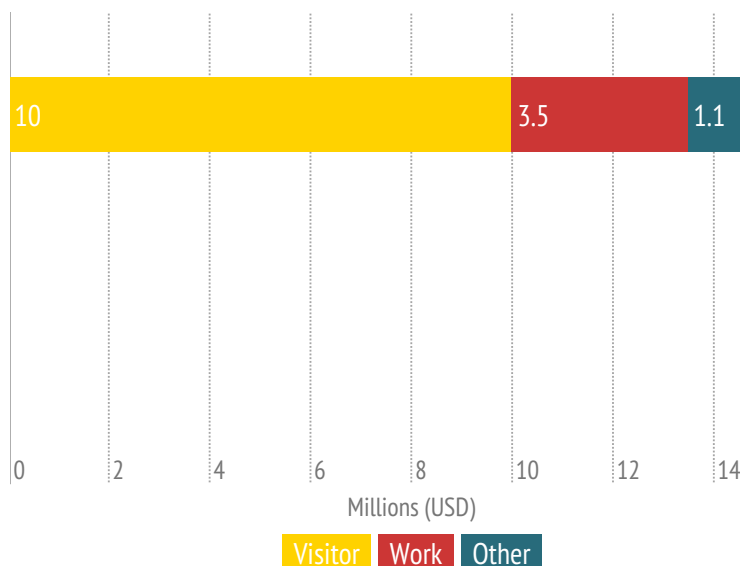


Figure 8: Projected economic distribution of traveler value-add

Under the UNWTO’s definition, visitors contribute US\$10 million or 68% of the estimated projections. Interestingly, individuals who travel to Timor-Leste for the primary reason of remuneration/work-purposes contribute to almost a quarter (24%) of the country’s tourism value-add of US\$3.5 million.

12 Direcção Nacional de Estatística (2014), Ministry of Finance retrieved from: <http://www.statistics.gov.tl/wp-content/uploads/2014/08/2nd-Quarter-Quarterly-Statistical-Indicators-2014.pdf>

13 Wherein 1666 individuals were approached for interview, and only 710 (39%) were included in the sample as valid respondents

14 Given the unobtainability of data for the second half of 2014 at the time of publication, and unusual arrival spikes in the latter half of 2013, population projections for 2014 have instead been based on quarterly growth patterns witnessed in 2012. Applying growth analyses from 2012 to current data, it is estimated that Timor-Leste will receive 58,795 airport arrivals in 2014.

15 This is not inclusive of domestic tourism, which may result in a marginally larger tourist economy.

16 Given the research criteria does not distinguish between visitors who resided in Timor-Leste for periods less than 12 months and 12 months or more, the visitor contribution under UNWTO definitions are to be interpreted as estimates rather than actuals.

17 United Nations (2008), ‘International Recommendations for Tourism Statistics 2008’ Department of Economic and Social Affairs, p.10

Concluding Remarks

Given the Government of Timor-Leste's US\$7.4 million budget¹⁸ allocation to the Ministry of Tourism in 2014, the research findings suggest that the sector's output exceeds input by almost 200%, and may yet be larger once the country's domestic tourism market has been financially quantified. Despite such economic projections, Timor-Leste's tourism sector remains dwarfed by that of its geographic neighbors. The Northern Territory in Australia reports an annual visitor economic value add of A\$1.78 billion,¹⁹ and neighboring Indonesia reports a tourist average spend of US\$1134 per trip, accumulating towards a total economic value add of US\$9.12 billion.²⁰ Considering the region's high potential for tourism, together with the findings from this research, highlights key needs from the demand-side of tourism in Timor-Leste that must be addressed, to ensure growth and development of the sector in coming years.

The research indicates that unmet traveler needs include poor levels of infrastructure, high costs of rental transport and limited availability of readily consumable information relating to travel within Timor-Leste. Additionally, in light of traveler desires to visit cultural and historic sites, there exists limited access to sites, and information about how to access sites. The findings provide an evidence base upon which the Ministry of Tourism can develop future policies that address the needs of travelers to Timor-Leste, and thus create an attractive environment within which the sector can flourish.

18 Ministry of Finance Timor-Leste (2014), '2014 State Budget' p.97 retrieved from: <https://www.mof.gov.tl/wp-content/uploads/2014/03/Budget-Book-1-ENGL.pdf>

19 Northern Territory Tourism (2013), 'Tourism Vision 2020: Northern Territory's Strategy for Growth'.

20 Prawira, Y (2014), 'Promising Tourism in Indonesia presents new investment opportunities,' CEIC Data retrieved from: <http://www.ceicdata.com/en/blog/promising-tourism-indonesia-presents-new-investment-opportunities>

Appendix: Survey Questionnaire

INTRODUCTION

In collaboration with Timor-Leste's Ministry of Tourism and The Asia Foundation a survey of visitors is being conducted this week in the departure lounge of Dili International Airport.

The aim of the questionnaire is to determine the needs and interests of visitors, following a period of travel to the country.

Comprising of up to 32 questions, the questionnaire will take approximately 20 minutes to complete. Although an enumerator will be available to provide clarification where required, your responses will remain anonymous and your individual identity will not be recorded.

The findings from this survey will be used to create an evidence base of actual experiences that will guide the Government of Timor-Leste's understanding of visitor needs, and assist future policy formation such that it is inclusive of tourism priorities.

Would you like to participate in this visitor survey?

1	Yes
2	No

[If selected "No"]

ii) Why?

1	Do not understand (due to language reasons)
2	Need to board plane
3	Have previously completed survey
4	No reason
5	Other (Specify)

[If selected "Do not understand (due to language reasons)"]

iii) What was the preferred language of communication? [open-ended response]

[If selected "Yes" to (A) continue reading below]

In what language would you like the survey to be conducted?

1	English
2	Tetun
3	Bahasa Indonesia
4	Portuguese
5	Mandarin

What is your age?

1	Less than 17
2	17 – 24

3	25 -34
4	35 -44
5	45 -54
6	55 -64
7	65 and older

[If “Less than 17” read paragraph below]

Thank you for offering to participate in our survey. Unfortunately, since you are under the age of 17 you do not qualify for inclusion in our analysis. We thank you for your time.

[If respondent is over the age of 17, continue with question below]

Where do you currently live?

1	Timor-Leste
2	Australia
3	Brazil
4	China
5	India
6	Indonesia
7	Japan
8	Malaysia
9	New Zealand
10	Pakistan
11	Philippines
12	Portugal
13	Other European Union States
14	Singapore
15	Thailand
17	USA
18	United Kingdom
19	Other (Specify) _____

[If answered “Australia”]

Q(D)i. What is the nearest capital city to where you live?

1	Darwin
2	Melbourne
3	Sydney
4	Canberra
5	Brisbane
6	Perth
7	Adelaide
8	Hobart
9	Don't know

[If selected “Timor-Leste” to Q(D)]

What is your nationality?

1	Australian
2	Brazilian
3	Chinese
4	Indian
5	Indonesian
6	Japanese
7	Malaysian
8	New Zealander
9	Pakistani
10	Filipino
11	Portuguese
12	Other nation of the European Union
13	Singaporean
14	Thai
15	Timorese
16	American
17	British
18	Other (Specify) _____

[If selected “Timor-Leste” in Q(D) and “Timorese” in Q(E) read paragraph below]:

Thank you for offering to participate in our survey. Unfortunately, since you are a Timorese national currently living in Timor-Leste, you do not qualify for inclusion in our analysis. We thank you for your time.

What was the length of your stay in Timor-Leste?

1	Less than 3 days
2	3 to 7 days
3	8 to 14 days
4	15 to 21 days
5	22 days to 1 month
6	Between 1 and 2 months
7	Between 2 and 3 months
8	More than 3 months

During this trip, or in the past one year, have you traveled for leisure within Timor-Leste?

1	Yes
2	No

[If selected ‘No’, read paragraph below]:

Thank you for offering to participate in our survey. Unfortunately, since you have not traveled for leisure within Timor-Leste during this trip or in the past one year, you do not qualify for inclusion in our analysis. We thank you for your time.

A. REASONS FOR TRAVEL

Is this the first time you have traveled to Timor-Leste?

1	Yes
2	No

[if responded “No” to Q1] 1a. How many times have you visited Timor-Leste before this trip?

1	Once
2	Twice
3	Three times
4	More than three times
5	Don't remember

2. What was the primary reason for your visit to Timor-Leste?

1	Visit friends and/or family
2	On holiday
3	Living with partner, who is working in Timor-Leste
4	Work (including paid work, unpaid work, volunteer work and aid work)
5	Resident of Timor-Leste
6	Business
7	Attend a conference/meeting
8	Other (Specify)

2a. [If responded “Work” to Q1] What type of work do you do in Timor-Leste?

1	Managing a private business
2	Looking for work
3	Attended a conference/ had meetings
4	Short-term work (less than six-months)
5	Long-term work (more than six-months)
6	Volunteer
7	Other (Specify)

2b. What other reasons, if any, did you have for visiting Timor-Leste? [Multiple Response]

1	In transit
2	Attended a conference
3	Accompanied someone attending a conference
4	Business
5	Visiting friends and/or family
6	Holiday/Pleasure
7	Education
8	On honeymoon
9	To explore/backpack
10	Working holiday
11	No other reasons
12	Other (Specify)

2c. [if responded “Work” to Q1 or “ Working holiday” in Q2b] While you were working in Timor-Leste,

did any of your friends or family (from overseas) come to visit you?

1	Yes
2	No

3. From which port did you arrive in Timor-Leste?

1	Darwin
2	Bali
3	Singapore
4	Mota'ain/Batugade
5	Tunubibi
6	Memo
7	Oesilo
8	Belulik-Leten
9	Bobomento
10	Other (Specify)
11	Don't Know

4. What mode of transport did you use to arrive in Timor-Leste?

1	Aeroplane
2	Ship
3	Car
4	Motorbike
5	Bus
6	Foot
7	Other (Specify)

5. Did you encounter any problem arriving here?

1	Yes
2	No

5a. [If responded "Yes" to Q5] What problem did you encounter?

1	Cost of Visa
2	Application for Visa
3	Transport Cancellation
4	Transport Delay
5	Other (Specify)
6	Prefer not to answer

6. Did you meet anyone you knew on your visit to Timor-Leste?

1	Yes
2	No

7. Are you traveling in a group, or on your own?

1	Alone
2	With friend(s)/family
3	As part of an organized tour group
4	With colleagues
5	Other (Specify) _____

[If selected “As part of an organized tour group”]

7a. Was the group a:

1	Sporting group (including diving, hiking and mountain biking)
2	Guided group holiday tour
3	A business or convention group tour
4	A religious group
5	A school or university excursion
5	Other (Specify)

8. Are you traveling with children?

1	Yes
2	No

B. PRE-ARRIVAL INFORMATION

9. Prior to your arrival, how did you find information about Timor-Leste? [Multiple Select]

1	Friends and/or family living in Timor-Leste
2	Television
3	Internet
4	Radio
5	Newspaper
6	Lonely Planet
7	Colleagues
8	Did not find any information
9	Other (Specify)

9a. Was the information that you found about Timor-Leste adequate for your travels?

1	Yes
2	No

10. What leisure activities did you intend to do while in Timor-Leste? [MULTIPLE SELECT]

1	Diving
2	Snorkelling
3	Mountain Biking
4	Hiking
5	Experience cultural activities
6	Visit historic sites
7	Beach leisure

8	Wildlife appreciation
9	Fishing
10	None
11	Other (Specify)

11. Did you make any bookings prior to your arrival for the activities mentioned in the previous question?
[respondent did not select 'refused' in Q10]

1	Yes
2	No

[If responded "Yes" to Q11] 11a. How did you make your booking?

1	Through a travel agent
2	Through an online-booking form
3	Telephoned directly
4	Through email
5	Asked a friend/family member that was in-country to make the reservation for you
6	Other (Specify)

12. Once in Timor-Leste, were you able to get enough information about your travels?

1	Yes
2	No

C. EXPERIENCE TRAVELING IN TIMOR-LESTE

The following questions refer to travel in Timor-Leste during your most recent trip or in the past one year for leisure purposes only. When answering these questions please do not refer to travel that you may have completed for work or business purposes.

13. When traveling for leisure, which of the following areas did you visit in Timor-Leste?

[MULTIPLE SELECT]

1	Dili
2	Baucau
3	Maubisse
4	Hato Builico/Mt. Ramelau
5	Lautem/Jaco Island
6	Com
7	Ata'uro
8	Maubara
9	Liquica
10	Maliana
11	Balibo
12	Aileu
13	Manatuto
14	Ossu/Viqueque

15	Manufahi
16	Oecussi
17	Other (Specify)

[If selected “More than 3 months” to Q(F)]

13a. In the past one year, approximately how many trips for leisure purposes have you completed within Timor-Leste?

[Insert Integer]

14. Reflecting on the last trip you made within Timor-Leste for leisure purposes, where did you go?
[SINGLE RESPONSE]

(If your last trip within Timor-Leste was to multiple destinations, please record the destination where you spent the most amount of time)

1	Dili
2	Baucau
3	Maubisse
4	Hato Bulico/Mt. Ramelau
5	Lautem/Jaco Island
6	Com
7	Ata'uro
8	Maubara
9	Liquica
10	Maliana
11	Balibo
12	Aileu
13	Manatuto
14	Ossu/Viqueque
15	Manufahi
16	Oecussi
17	Other (Specify)

15. What was the mode of transport you used on this trip?

1	Rental Vehicle
2	Friend's/family's Vehicle
3	Personal Vehicle
4	Company/Work Vehicle
5	Taxi
6	Bus
7	Microlet
8	Boat
9	Bicycle
10	Walk
11	Motorbike
12	Other (Specify)

If NOT selected “walk” or “personal vehicle” or “company/work vehicle”]

15a. What was the associated cost of using this mode of transport?

INTEGER RESPONSE (set $\$0 < x < \2000)

[If NOT selected “walk” or “personal vehicle” or “company/work vehicle]

15b. How would you rate levels of satisfaction towards the transport option that you used?

1	Very Satisfied
2	Satisfied
3	Unsatisfied
4	Not satisfied at all

[If NOT selected “walk” or “personal vehicle” or “company/work vehicle]

15c. How would you rate your expenditure towards the transport option that you used?

1	Value for money
2	Not value for money
3	Don't know

Q16. What type of accommodation did you use when you traveled here?

1	Hotel
2	Guesthouse
3	Backpacker hostel
4	Serviced apartment
5	Eco-resorts/campsites
6	Pousada
7	Family or Friend's House
8	Private rental
9	Privately owned property
10	Did not stay overnight
11	Other (Specify)

[If NOT selected “Private rental”, “Privately owned property” or “Did not stay overnight” above]

16a. How much did you spend on this type of accommodation?

INTEGER RESPONSE (set $\$0 < x < \2000)

16b. How would you rate your satisfaction levels towards the quality of the accommodation that you used?

1	Very Satisfied
2	Satisfied
3	Unsatisfied
4	Not satisfied at all

16c. How would you rate your expenditure towards the accommodation that you used?

1	Value for money
2	Not value for money
3	Don't know

17. While on your most recent trip within Timor-Leste, what was the primary leisure activity you participated in?

1	Diving
2	Snorkelling
3	Mountain Biking
4	Hiking
5	Experience cultural activities
6	Visit historical sites
7	Beach leisure
8	Wildlife appreciation
9	Fishing
10	None
11	Location where friend/family lived
12	Other (Specify)

[If NOT selected "None" or "Location where friend/family lived"]]

17a. What was the associated cost of participating in this leisure activity?

INTEGER RESPONSE (set $\$0 < x < \2000)

17b. How would you rate your satisfaction levels towards the quality of the leisure activity that you participated in?

1	Very Satisfied
2	Satisfied
3	Unsatisfied
4	Not satisfied at all

17c. How would you rate your expenditure towards the leisure activity that you participated in?

1	Value for money
2	Not value for money
3	Don't know

18. On your most recent trip within Timor-Leste, did you experience art and culture? (for example, visit museums, art galleries or cultural sites)

1	Yes
2	No

[If "YES"]

18a How would you rate your experience encountering and experiencing art and culture in Timor-Leste:

1	Very Enjoyable
---	----------------

2	Enjoyable
3	Unenjoyable
4	Not at all enjoyable

19. On your most recent trip within Timor-Leste, how would rate your satisfaction levels towards the culinary experience?

1	Very Satisfied
2	Satisfied
3	Unsatisfied
4	Not satisfied at all

19a. How would you rate your expenditure towards this culinary experience?

1	Value for money
2	Not value for money
3	Don't know

20. Overall, how would you rate feelings of personal safety and security, while traveling for leisure in Timor-Leste?

1	Very Good
2	Good
3	Poor
4	Very Poor

21. Overall, how would you rate hospitality/customer service while traveling for leisure in Timor-Leste?

1	Very Good
2	Good
3	Poor
4	Very Poor

22. Overall, how would you rate infrastructure in Timor-Leste, in relation to your ability to travel for leisure?

1	Very Good
2	Good
3	Poor
4	Very Poor

23. Overall, did your experience traveling for leisure in Timor-Leste meet your expectations?

1	Yes
2	No

24. Would you recommend your friends visit Timor-Leste?

1	Yes
2	No
3	Don't Know

[If selected 'YES' to Q22]

24. In your opinion, what are the main attractions in Timor-Leste that would encourage your friends or family to visit? (Max. 3)

1	Diving
2	Snorkelling
3	Mountain Biking
4	Hiking
5	Experience cultural activities
6	Visit historic sites
7	Beach leisure
8	Wildlife appreciation
9	Fishing
10	Other (Specify)

[If NOT selected "More than 3 months" in Q(F)] – GO TO SECTION D

D. TRAVEL EXPENDITURE

25. Reflecting on your expenses, what is the total amount of money you think you spent on your trip to Timor-Leste?

INTEGER RESPONSE

26. Prior to arrival, how much money did you spend on pre-booked hotels and activities?

INTEGER RESPONSE

27. Prior to arrival, how much money did you spend on international air/sea fares?

INTEGER RESPONSE

28. How much money did you spend in-country, while in Timor-Leste?

INTEGER RESPONSE (set $\$0 < x < \$5,000$)

29. Overall, how would you rate your expenditure in Timor-Leste (i.e. was Timor value for money?)

1	Value for money
2	Not value for money
3	Don't know

E. DEMOGRAPHIC INFORMATION

30. What is your nationality?

1	Australian
2	Brazilian
3	Chinese
4	Indian
5	Indonesian
6	Japanese

7	Malaysian
8	New Zealander
9	Pakistani
10	Filipino
11	Portuguese
12	Other nation of the European Union
13	Singaporean
14	Thai
15	Timorese
16	American
17	British
18	Other (Specify) _____

31. What is your occupation?

1	Business Owner
2	Self Employed
3	Work for a private company
4	Work for an International or Local NGO
5	United Nations
6	Government Official
7	Diplomatic Mission
8	Volunteer
9	Attend University/ student
10	Retired
11	Unemployed
12	Other (Specify)

32. Please record your gender:

1	Male
2	Female

33. What is your flight number?

1	SJ2710
2	SJ271
3	TL511
4	TL513
5	TL515
6	TL517
7	TL519
8	MI 295
9	Other (Specify)

This is the end of the survey. Thank you for participating in our survey and contributing to the development of the country's tourism sector. If you have any questions, please do not hesitate to contact The Asia Foundation's office in Timor-Leste at TAFTimorLeste@asiafound.org



The Asia Foundation



Australian Government
Department of Foreign Affairs and Trade

