Timor-Leste Communication and Media Survey

UNMIT
United Nations Integrated Mission in Timor-Leste
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TIMOR-LESTE COMMUNICATION AND MEDIA SURVEY

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- Members of the CPIO Outreach team

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ACRONYMS

CNE	National Electoral Commission, Government of Timor-Leste
CPIO	Communication and Public Information Office, UNMIT
DK/NA	Don't Know/No Answer
DNE	National Statistics Directorate, Ministry of Finance, Government of Timor-Leste
DNTPSC	National Directorate for Land, Property and Cadastral Services, Ministry of Justice, Government of Timor-Leste
GoTL	Government of Timor-Leste
IDP	Internally Displaced Person
MoE	Margin of Error
MSS	Ministry of Social Solidarity, Government of Timor-Leste
MTCI	Ministry of Tourism, Commerce and Industry, Government of Timor-Leste
n.a.	Not Available
NGO	Non-governmental organisation
PNTL	Timor-Leste National Police
RTL	Radio Timor-Leste, part of RTTL
RTTL	Radio-Televizaun Timor-Leste, parent company of RTL and TVTL
SMS	Short message service or text message service
STAE	Technical Secretariat for Electoral Administration
STL	Suara Timor Lorosae, a media company
TVTL	Televizaun Timor-Leste, part of RTTL
UNDP	United Nations Development Programme
UNEST	United Nations Electoral Support Team
UNMIT	United Nations Integrated Mission in Timor-Leste
UNPOL	United Nations Police
USAID	United States Agency for International Development

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EXECUTIVE SUMMARY

This survey is the second nation-wide media use study conducted in Timor-Leste. UNMIT commissioned this study to provide a comprehensive update of the findings from Foundation Hirondelle's National Media Survey of 2006, also conducted by INSIGHT. The main objectives of the study are to:

1) assess the extent of media coverage and audience reach/access to information and types of media in Timor- Leste, as well as the reach and impact of non-media information sources;

2) provide updated baseline information to UNMIT, Government of Timor-Leste and other partners to improve future communication efforts; and

3) to evaluate the effectiveness of media campaigns conducted by UNMIT and the Government of Timor-Leste in order to improve future design.

The study consists of two parts: first, a nation-wide survey of 2,500 randomly selected respondents in all 13 districts throughout the country; and, second, a series of nine focus group discussions (FGD) in seven districts to explore the survey findings. The survey represents the opinion of Timorese adults of 15 years of age or older and yields a maximum margin of error of +1.95%. Interviews were conducted in May 2010.

Major findings

Media comparison

- Radio still has the highest reach of any individual medium, although television is catching up.
- As sources of information, community leaders are still the most accessed and most trusted sources.
- Mobile phone penetration is increasing and mobile phones are becoming a significant communication tool.
- 16% of the population does not access any form of media (radio, television, newspapers,

internet or mobile phones). This group obtains information about issues of concern from other sources, such as traditional leaders and by word of mouth.

- Regional variations: Oecusse lags behind in several ways, including newspaper readership and mobile phone ownership. Other districts with significantly high numbers of non-users of media are Aileu, Viqueque, Ainaro and Covalima.

Language use

- Timor-Leste is a multilingual society. Uses of languages vary according to context: Tetum is mostly used for interaction across regions and with foreigners, while local languages are used in communities. The survey did not detect demand for use of local languages other than Tetum in the media.
- Tetum remains the preferred language in the media for the majority of respondents, with a slight increase in preference. There was a rise in the use of Portuguese, followed by a drop in the use of Indonesian.
- Preferences for Indonesian and Portuguese are now similar, but still with a higher preference for Indonesian.

Communication strategies

- All issues tested were widely recognised (all above 65% of respondents), which reflects positively on information campaigns and efforts.
- Community leaders, followed by radio and television, are consistently the most accessed and most trusted sources of information.
- Posters and banners received low or zero recognition.

Radio

- Since 2006, radio has increased in daily, weekly, monthly and total reach; and still has the highest reach of any single medium (weekly reach = 55%).
- News and current affairs are still the most listened to programmes on radio. Demand for music has increased.
- Morning and early evening peak listening hours have not changed since 2006.
- The national broadcaster RTL is still the most recognised channel. RTL's new AM and FM services receive high individual recognition. Private and community radio stations have significant recognition and listening responses.
- Since 2006, the number of radio listeners who report having ever listened to RTL has nearly doubled; listeners also report better reception quality.

Television

- Since 2006, television has increased in daily, weekly, monthly and total reach. Weekly reach has almost doubled to just behind that of radio (weekly reach = 48%).
- The majority of this increase occurred in the districts.
- TVTL is by far the most watched channel; around one third of viewers report watching television at the local *sede de suku* (office of administrative subdivision of the sub districts, which includes a group of villages – or '*aldeias*'); this roughly corresponds to one in five people.
- The most watched programme is *Telejornal Tetum*. Peak viewing hours mirror the 2006 survey with a sharp spike at the time that Telejornal Tetum is broadcast.
- Indonesian television channels have significant recognition rates.

Newspapers

- Total reach of newspapers and magazines has slightly increased since 2006 (weekly reach now is 21%). There is, however, a significant regional variation: Dili dominates with 46%, and Oecusse lags at 7%.
- The majority of readers are of low or medium education. However, newspapers are also read by a large percentage of highly educated readers. This means there is no social status divide in newspaper readership. In raw numbers, highly educated readers are a small percentage of the total number of readers.
- Barriers to higher readership include cost and literacy.

Mobile phones

- There has been a six-fold increase in total ownership of mobile phones per household since 2006. However, there is significant regional variation in this data (Dili 90%, Oecusse 25%).
- A significant majority of users report making calls as the primary use of their phone.
- Around half report using text messages and most recognised recent text message promotions and campaigns.
- Cost is considered the primary barrier to greater use of phones.

Internet

- Use of internet has doubled since the 2006 survey, but is still low compared to neighbouring countries in both absolute terms and rate of increase.
- Internet cafes and workplaces are the primary places of use.
- Most internet users are in Dili.

Gender

- The study found total reach for radio, television and newspaper is 8% points higher among male compared to female responses – down from a 9% gap found in 2006.

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INTRODUCTION

The most recent similar media survey in Timor-Leste was completed in late 2006 by the Hirondelle Foundation. Since then, many events, changes and improvements have occurred.

This survey focused on studying and assessing how different elements of Timorese society receive and understand information, from media and non-media sources. The study includes both qualitative and quantitative aspects, and reached people in all 13 districts of Timor-Leste including rural communities at the *suku* and *aldeia* level.

The results of this survey provide a reliable foundation for UNMIT, development partners and the Government of Timor-Leste to design communication strategies and initiatives aimed at specific target groups.

Objectives

This study has three main objectives:

1. To assess the extent of media coverage and audience reach/access to information and types of media in Timor-Leste, as well as the reach and impact of non-media information sources.
2. To provide updated base-line information to both UNMIT and the Government of Timor-Leste to improve future communication efforts.
3. To evaluate the effectiveness of media campaigns conducted by UNMIT and the Government of Timor-Leste.

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METHODOLOGY

The methodology of this study was designed so results represent the opinion of Timorese age 15 years or older. As a result, the demographics of the sample mirror those of the population based on the latest available census data of 2004[1]. Timor-Leste conducted the second national census in 2010, however, until this report was written, the full results of the census were not available. The following explains the methodology used in this study.

Sampling technique and margin of error

Multistage random probability sampling techniques were used in the survey. At the first stage probability proportional to size sampling was used to select 256 *aldeias* – where the number of *aldeias* randomly selected in each district was proportional to the population of that district. At the second stage, a maximum of 10 households in each *aldeia* were selected using a systematic random sampling table. At the third stage, Kish Grids were used to select a member of the household to be interviewed.

The sample design included provision for at least two call-backs to interview the selected respondent if he or she was not home at the time of the first contact with the household. The sample design also provided for the replacement of the sampled individual by a similar method if he or she could not be located for an interview during the time that the interviewers were in the community, or if he or she refused to be interviewed. Nationally, only 0.4% of the initially chosen respondents had to be replaced. There were no significant problems reported during fieldwork other than the usual logistical issues, such as weather, impassable roads and broken vehicles.

Based on the national sample size of 2,500, the survey yields a margin of error of plus or minus 1.95% at a 95% confidence level and 50% intervals. Please refer to the margin of error table in the appendices (page 78) for margins of error for sub-groups such as districts, gender and education.

Coverage and data collection period

The survey covers the whole country. Interviews were conducted in 256 *aldeias* (out of 2,234, or 11%), reaching 173 *sukus* (out of 442, or 39%), in 57 sub-districts (out of 65, or 87%) in all 13 districts of Timor-Leste.

Face-to-face interviews were conducted between May and June of 2010 (including quality control).

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[1] *TIMOR-LESTE,* Census of Population and Housing 2004. Atlas. *Published by the National Statistics Directorate (2006).*

Focus group findings

Since focus groups are qualitative in nature, results do not necessarily represent the opinion of the majority of the population. Readers need to treat focus groups findings as anecdotal evidence and an illustration of opinions and habits that exist in society. Any inference about the whole population should only be done based on the findings of the survey itself. Findings from the focus groups are presented in text boxes like this throughout this document.

Focus group discussions

To examine in more depth the findings of the survey, the study conducted nine focus group discussions in eight districts. Individuals who had been interviewed were invited to attend a guided discussion as informants. The main goals were to obtain deeper understanding about findings from the survey, clarify and validate results and provide qualitative understanding of reasons, and possible explanations of findings.

Three focus groups were conducted among those who never use the media (television, radio and newspapers), the so-called 'non-users of media', in order to gain a better understanding of information-seeking behaviour that might not be recorded in the survey.

The focus groups were conducted from 2 to 9 October, 2010.

Quality control

Comprehensive quality control measures were implemented throughout the survey process, as follows:

- Experienced and fully trained interviewers conducted the interviews.
- A questionnaire was pre-tested in both urban and rural locations.
- Field supervisors checked the selection of respondents, witnessed at least 40% of interviews, and spot checked the data of the remaining 60% of interviews.
- All completed questionnaires were reviewed in the field by supervisors for accuracy and consistency and respondents re-interviewed if necessary.
- All data was double entered and rechecked before processing. The double entry average discrepancy was 0.4%.
- All data records were subject to standard database cleaning processes.

Important notes

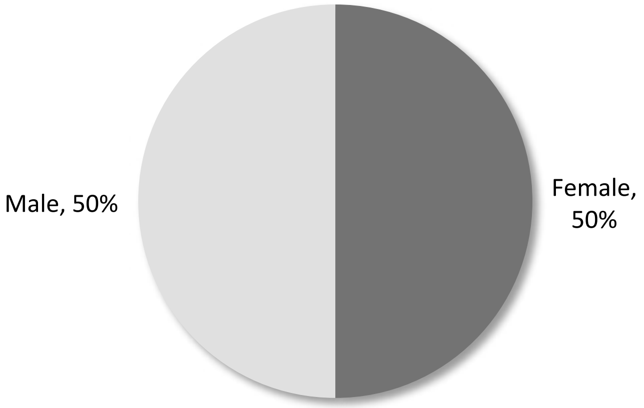
The following are important notes for reading the graphs and information in this report:

- Multiple-response questions are marked with [m] while single-response questions are marked with [s].
- 'N' represents the number of respondents represented on the graph in question; this is to clarify when a graphic is referring to the general population sample or to sub-groups.
- Regarding comparisons to the 2006 Hirondelle Survey: the margin of error in the 2006 survey is estimated as +/-2.7%, while the 2010 survey's is +/-1.9%. Therefore, comparisons that differ by less than 4.5% may be considered insignificant.
- Some questions were not asked in exactly the same way, so not all findings are comparable across the surveys. Generally, comparisons are only illustrated in this report for comparable questions; where it is illustrative to compare nonidentical questions, this is referred to in the text.

SAMPLE DEMOGRAPHICS

GRAPH 1. GENDER
N=2500

Gender [s]

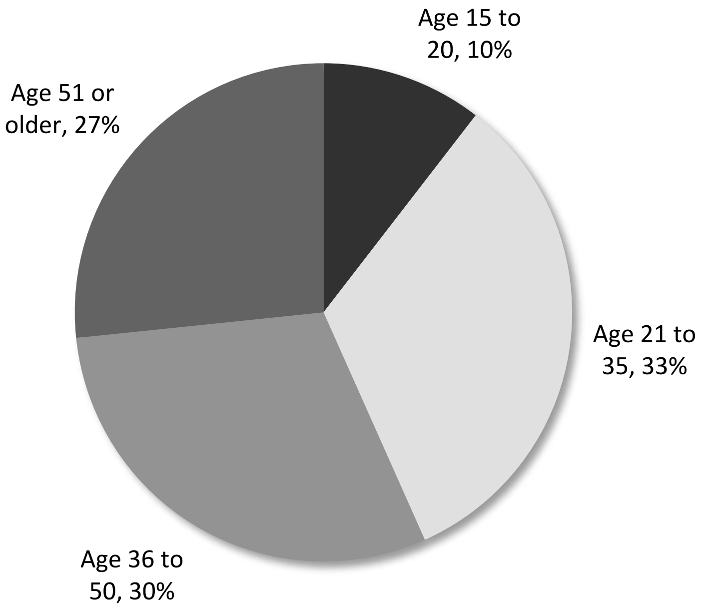


Gender

In line with the design of the survey and 2004 census data, 50% of the respondents in this survey are male and 50% are female, as show in **Graph 1** above. All questions asked in this survey were analysed for differences in responses between male and female respondents and only when a significant difference was observed is it presented in the graphs.

GRAPH 2. AGE
N=2500

Age [open]



Age

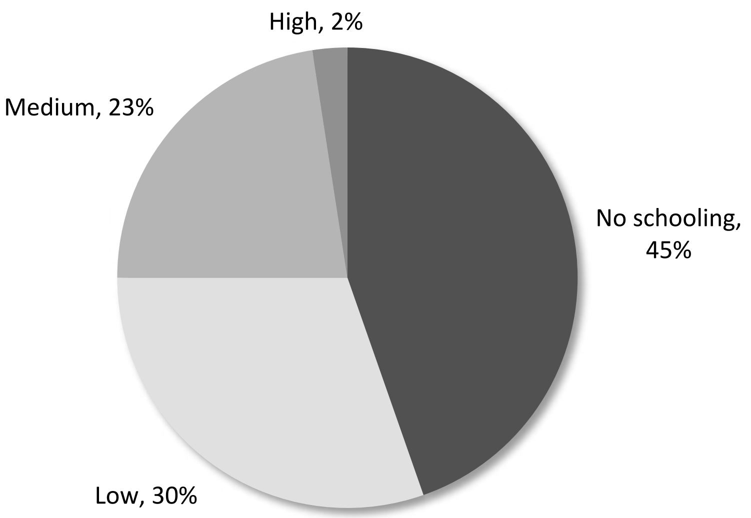
Graph 2 above shows the age of the respondents. It matches the 2004 census data.

10% of the respondents are 15- to 20-years-old and 33% are 21- to-35-years-old.

30% of respondents are 36- to 50-years-old, and 27% are 51-years-old or older at the time of the interview.

GRAPH 3. EDUCATION
N=2500

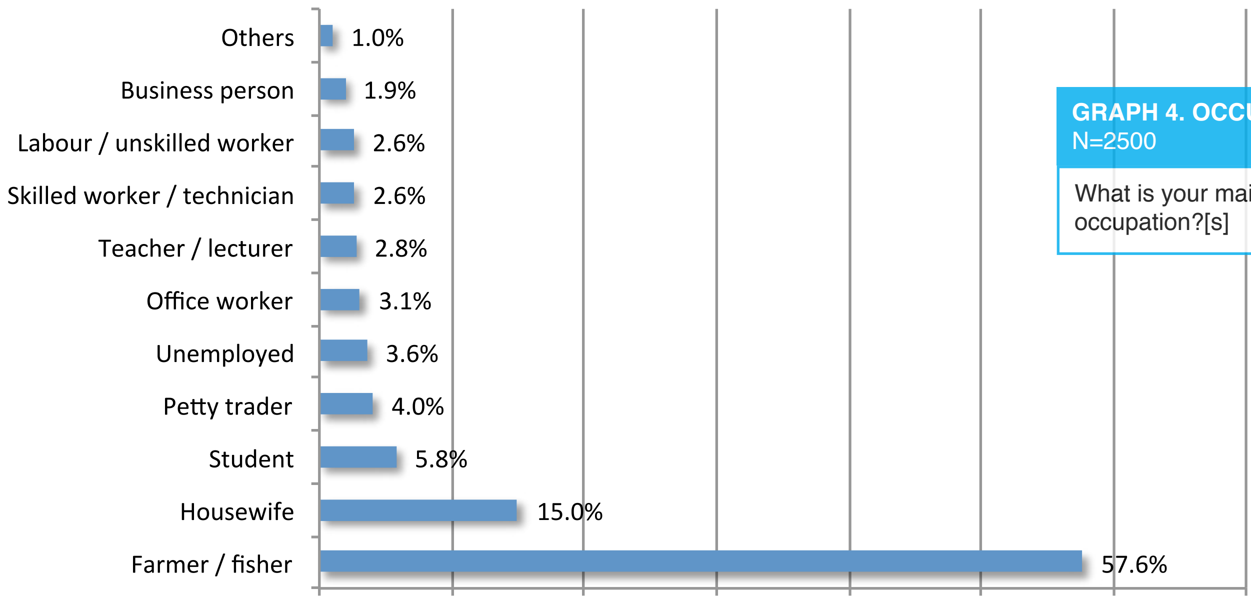
What level of education have you reached? [s]



Education

Graph 3 above shows that only 2% of the respondents have a high level of education (completed university), while 23% have a medium level of education (reached and/or completed secondary school). 30% have a low education level (reached and/or completed pre-secondary school). 45% have no schooling.

Figures are comparable to those found in the Timor-Leste Survey of Living Standards of 2007, which found that 1.3% of the population had a high education; 18.9% had a medium education, 33% had a low education, while 46.8% had no schooling[2].



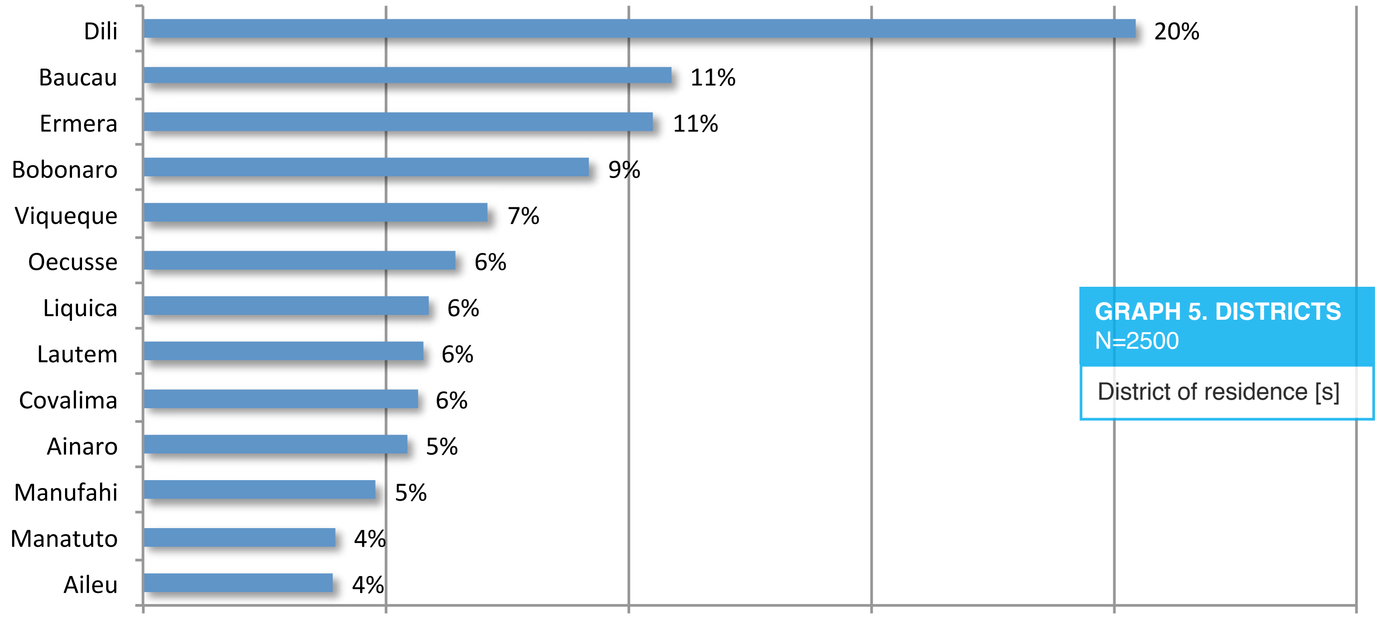
GRAPH 4. OCCUPATION
N=2500

What is your main occupation?[s]

Occupation

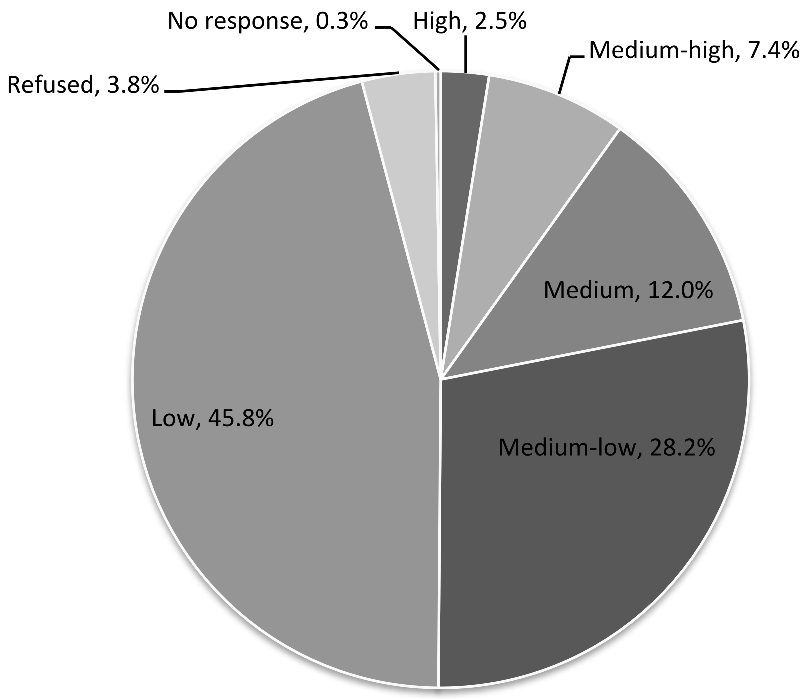
We asked respondents what their main occupation is. As Graph 4 above shows, the majority (58%) of respondents are working as farmers or fishers – up from 44% in the 2006 survey. 15% stated they are housewives – up from 4% in 2006. 6% are students. Interestingly, only 4% stated they are unemployed. This is consistent with the 3% who stated this in the 2006 survey.

[2] *TIMOR-LESTE*. Timor-Leste Survey of Living Standards 2007 – Final Statistical Abstract. *Conducted by the National Statistics Directorate (DNE). Published July 2008, page 65 (Education pages 63-94).*



Districts

Graph 5 above shows the percentages of respondents in each of the 13 districts. 20% of respondents are living in Dili. 11% are living in Baucau and Ermera.



GRAPH 6. INCOME
N=2500

What group of income would you say you belong to? [s]

Income

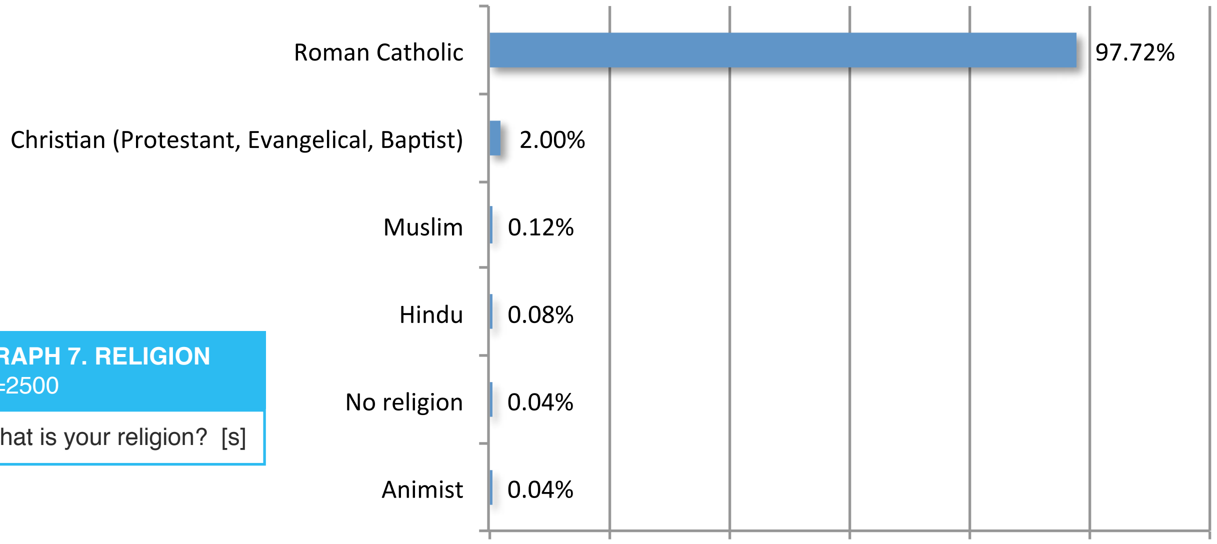
We asked in what group of household income respondents would categorize themselves. As shown in **Graph 6**, above, almost half (46%) stated they belong to the low income group (below $10 per month[3]). 28% stated they belong to the medium-low group with a monthly income between $11 and $50. Though the question was asked differently, results are similar to the 2006 survey.

12% of respondents have a medium income (between $51 and $100) and 7% have medium-high income (between $101 and $200) and 3% of respondents have a monthly income above $200.

[3] Timor-Leste adopts the United States dollar as its currency. Unless stated otherwise, all sums of money mentioned in this report are, thus, in US dollars.

GRAPH 7. RELIGION
N=2500

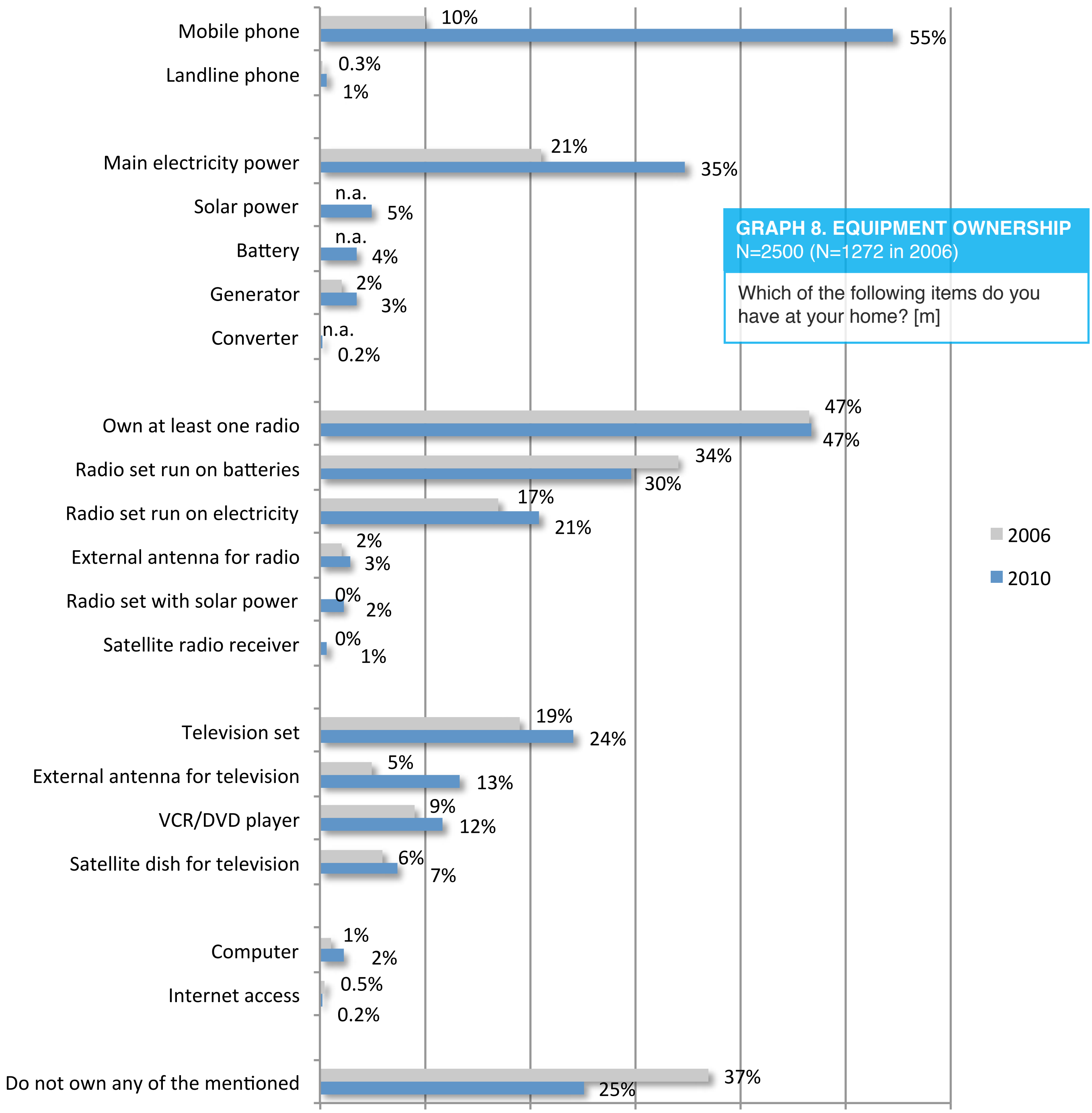
What is your religion? [s]



Religion

Consistent with available population data, the majority (98%) of respondents are Roman Catholic, as shown in **Graph 7**, above.

2% of the respondents are Protestant. The survey also recorded opinions of Muslims and Hindus, both religious minorities in Timor-Leste.



Media and communication equipment ownership

Graph 8 shows that in more than half of respondents' households there is a mobile phone. Mobile phones continue to be the fastest growing communication medium, and have the highest penetration in Timor-Leste. Mobile phone penetration has climbed from 10% in 2006 to 55% in 2010.

Almost one in three (30%) of respondents stated they have a radio that runs on batteries in the house, while 21% stated they have a radio that runs on electricity. Compared to 2006, radios on electricity increased slightly (4%) and radios that run on batteries decreased slightly (4%). Overall, the ownership of radios remains the same since 2006 (47%).

This is consistent with the increase of households with electricity, up from 21% in 2006 to 35% today. The survey also found that 5% of households now have solar power.

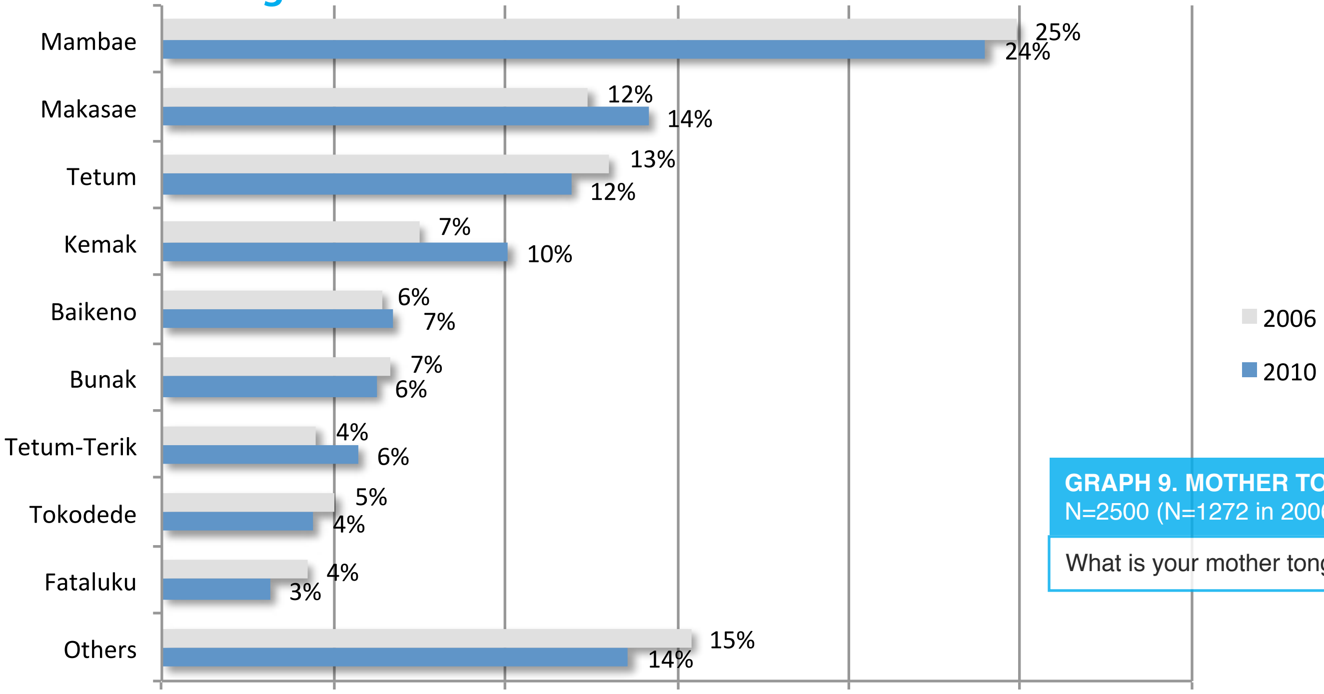
The proportion of households with a television set has increased from 19% in 2006 to 24% today.

The proportion of households without any media equipment has decreased from 37% in 2006 to 25% today.

LANGUAGES AND THE MEDIA

In this survey, all questions relating to language, including media use, were concentrated in one section. This was done in order to obtain clearer comparisons regarding the languages people use and prefer in the media.

Mother tongue



GRAPH 9. MOTHER TONGUE
N=2500 (N=1272 in 2006)

What is your mother tongue? [s]

As shown by **Graph 9**, above, the results are mostly congruent with the 2006 survey – within the margin of errors of both surveys. This validates the quality of both surveys, which shows consistent results for mother tongue of respondents.

One in four Timorese has Mambae as his/her mother tongue, the largest percentage. Makasae and Tetum are 14% and 12% respectively. Kemak is 10% and Baikeno is 7%. Bunak and Tetum-Terik are 6%. Tokodede is 4% and Fataluku is 3%. There are many other mother tongues in Timor-Leste (14%). The survey recorded a total of 25 different languages, the others being: Galolen, Adabe, Idate, Kairui-Midiki, Lakalei, Maku'a, Nau-Eti, Waima'a, Han Chinese, Indonesian, Portuguese, Bekais, Makalero, Wawa Bikeli, Karhili, Oko, Manroni, and Lolei.

There are regional variations of mother tongues throughout the districts. Mambae is the mother tongue of 90% of respondents in Aileu; 75% in Ainaro; 62% in Manufahi; and 57% in Ermera (54% in central districts[4]).

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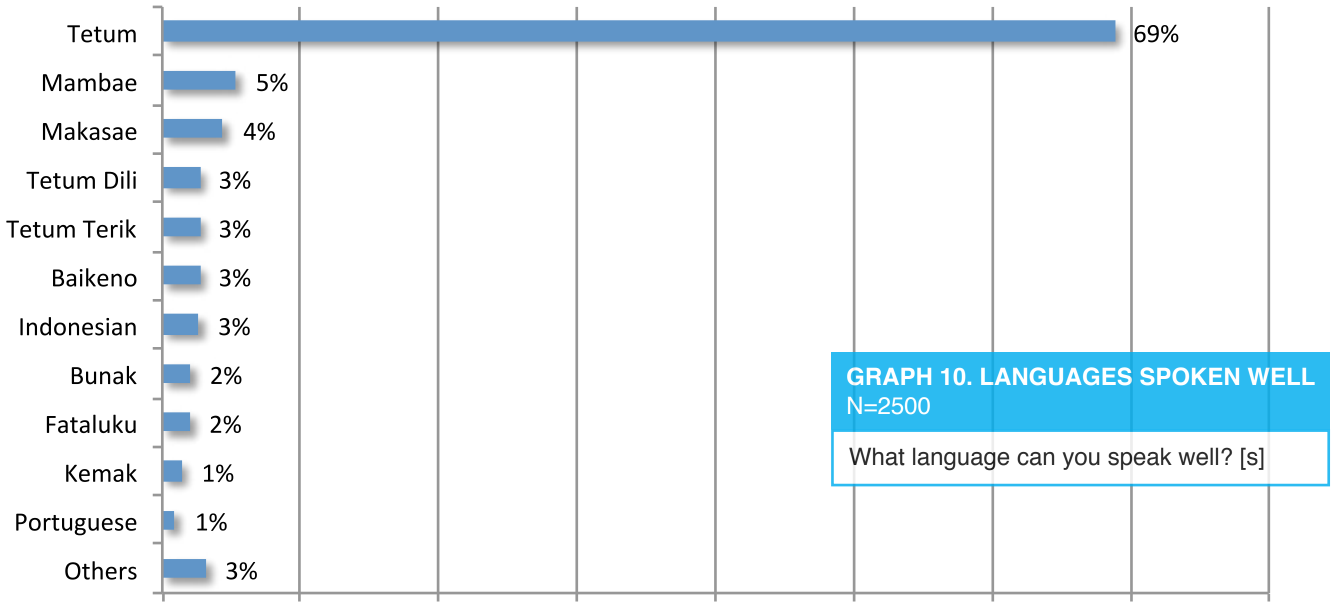
[4] *In this report, central districts are Dili, Aileu, Ainaro and Manufahi; western districts are Bobonaro, Liquica, Covalima, Ermera and Oecusse. Eastern districts are Baucau, Manatuto, Viqueque and Lautem.*

The Makasae language is the mother tongue of 83% of respondents in Baucau and 33% in Viqueque (43% in the eastern districts); while Tetum is the mother tongue of 35% of respondents residing in Dili. Kemak is the mother tongue of 60% of respondents in Bobonaro, and of 33% in Ermera (average 35% in the western districts).

Languages spoken well



The survey asked each respondent to state one language they speak well other than their mother tongue, which should indicate the language respondents feel most comfortable to use in everyday conversation. Different from 2006 survey, the respondents were asked to name one language only. This means that while the 2006 survey probed for language skills, this survey probes for language preferences.

As shown in **Graph 10**, the majority of respondents (69%) stated they speak Tetum well. 3% of respondents stated they speak Tetum Dili and another 3% stated they speak Tetum-Terik well[5].

The percentages of respondents stating they speak other languages well are low. 5% of respondents stated they speak Mambae well, 4% stated Makasae and 3% each for Baikeno and Indonesian. 1% of respondents stated they speak Portuguese well.

Statements about what languages are spoken well vary among demographics. In Lautem, only 44% claim to speak Tetum well, while 33% say they speak Fataluku well. Only one in three respondents (33%) in Oecusse stated they speak Tetum well, against 47% who stated they speak Baikeno well. The data suggests that the percentage of respondents who speak Tetum well is higher among younger Timorese.

12% of respondents in Oecusse stated they speak Indonesian well. 4% of respondents in Dili stated they speak Portuguese well. 6% of students stated they speak Portuguese well, as did 3% of those between the ages of 15 and 20, and 6% among highly educated respondents.

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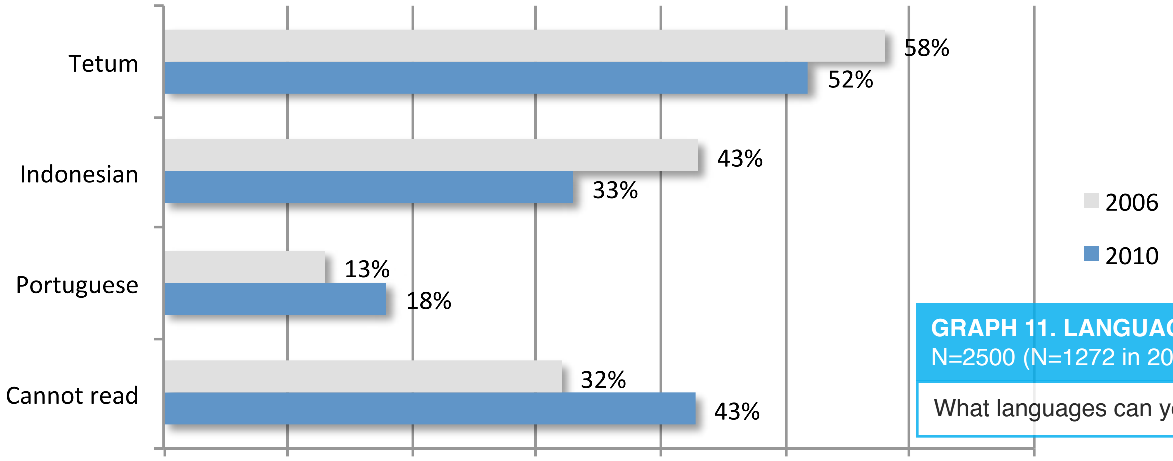
[5] *For the international reader, it should be noted there are two distinct forms of Tetum used in Timor-Leste: Tetum Dili, also called Tetum Prasa, is commonly associated with the capital and the northern coast; Tetun-Terik is associated with the districts and southern areas. The questionnaire codes people's actual responses.*

Languages read



GRAPH 11. LANGUAGES READ
N=2500 (N=1272 in 2006)

What languages can you read? [m]

Graph 11 shows that Tetum is mentioned by half (52%) the respondents as the language they can read, down from 58% in 2006. One in three respondents (33%) stated they can read Indonesian – down from 43% who stated this in 2006.

18% of respondents (up from 13% in 2006) stated they read Portuguese. The data show demographic variations:

- The percentage of Portuguese readers is higher in Dili (32%);
- 51% of highly educated people read Portuguese;
- 66% of students read Portuguese;
- 49% of high income respondents read Portuguese;
- 46% of 15- to 20-year-olds can read Portuguese (while 35% of this age group also stated they can read Indonesian, and 75% stated they can read Tetum).

65% of 21- to 35-year-old respondents can read Tetum, while 49% read Indonesian and 31% read Portuguese.

Interestingly, 43% of respondents voluntarily stated they are unable to read. This number is higher than the 32% found in the 2006 survey[6]. The 2004 Census Atlas affirms, though, that "over 400,000 of the 741,530 people older than 6 years of age are illiterate"[7], around 54% of the population. The Census doesn't present data for illiteracy among the population aged 15 years or older.

A possible explanation for this discrepancy is that people might now feel freer to express their condition; it could also simply be because the question was asked differently than in 2006. However, data from this survey is consistent with another survey conducted by INSIGHT[8] in February 2010 which shows that 50% of people 17 years or older are illiterate, while 2009 data from UNDP shows that 42% of the 15+ population is illiterate[9]. The population cohort of this survey is 15 years or older, and analysis shows 90% of those aged 15 to 17 years can read.

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[6] *This finding was not highlighted in the 2006 report. INSIGHT obtained this result through the 2006 survey data.*

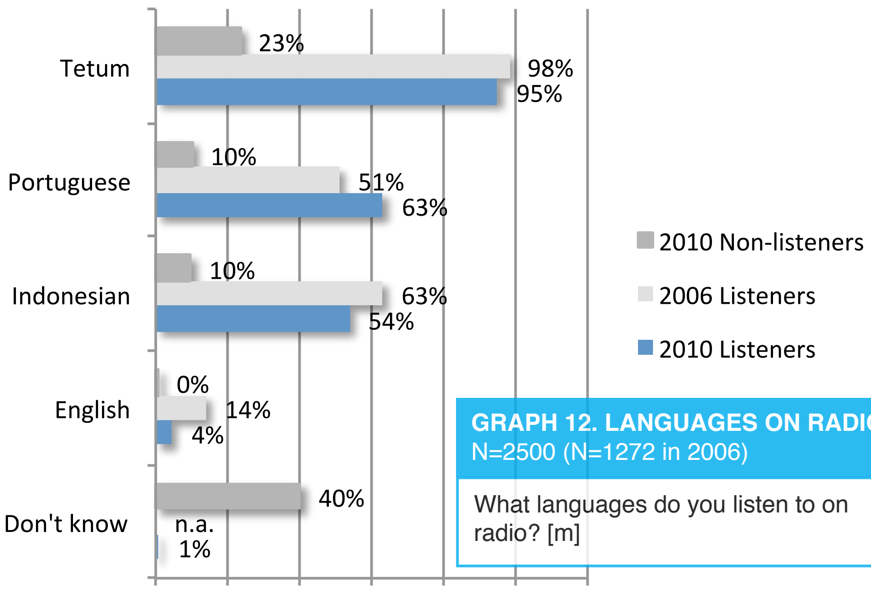
[7] *The Census 2004 defined illiterates as those that "are unable to both read and write any of Timor-Leste's four working languages (Tetum, Portuguese, Indonesian or English)". In TIMOR-LESTE, 2006.* Census of Population and Housing 2004. Atlas. *Published by the National Statistics Directorate. Page 72.*

[8] *INSIGHT, 2010.* Cultural Values and Profile Study. *INSIGHT – Cultural Change Institute, Tufts University, Boston, USA. Report Published in July 2010.*

[9] *UNDP, 2009.* Timor-Leste Millennium Development Goals 2009 Report. *UNDP Timor-Leste, accessed 15 December 2010. http://www.tl.undp.org/MDGs/MDGs_File/UNDP_MDGReport_Final.pdf*

The percentage of respondents stating they cannot read varies across demographic groups. It is 59% in Aileu; 60% in Ermera, 63% in Oecusse and only 20% in Dili. It is 45% among women against 40% among men; 17% among 17- to 20-year-olds, compared to 75% among those 51 years or older; and 90% of those with no schooling.

Languages on radio



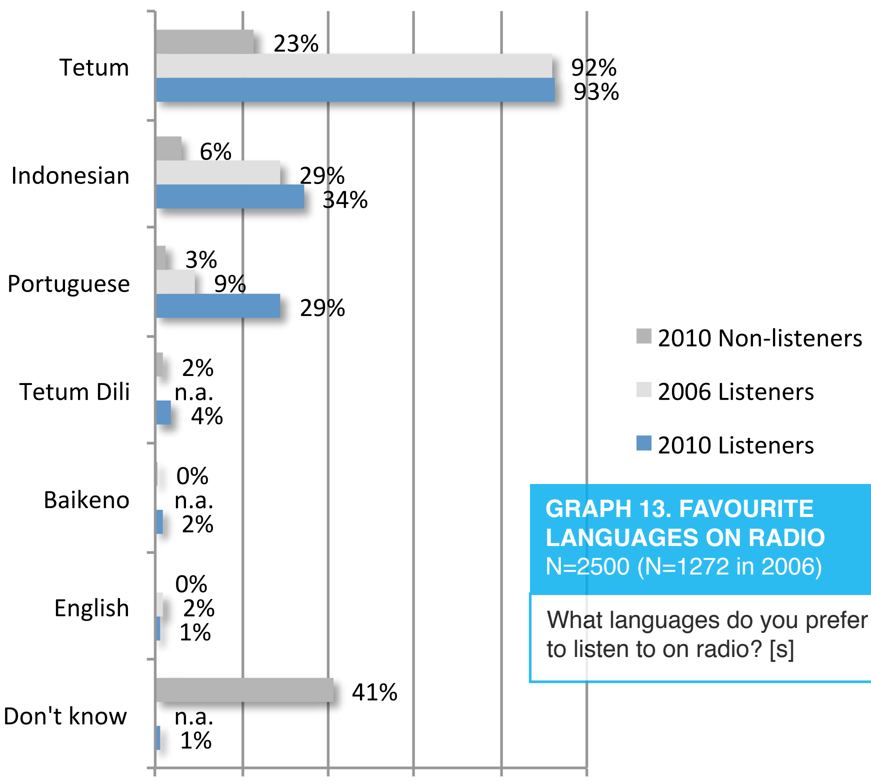
GRAPH 12. LANGUAGES ON RADIO
N=2500 (N=1272 in 2006)

What languages do you listen to on radio? [m]

The survey asked respondents what languages they listen to on the radio. Unlike the 2006 survey, we asked this question to all respondents regardless of whether they listen to the radio or not.

Graph 12 (right) compares the findings against those of the 2006 survey, including both listeners and non-listeners of radio. Tetum is listened to on radio by 95% of listeners today, similar to 2006 (98%).

The percentage of listeners who stated they listen to Portuguese on radio has increased from 51% in 2006 to 63% today; the percentage of listeners to Indonesian has decreased from 63% in 2006 to 54% today, and the response for listening to English has also dropped from 14% in 2006 to 4% today.



GRAPH 13. FAVOURITE LANGUAGES ON RADIO
N=2500 (N=1272 in 2006)

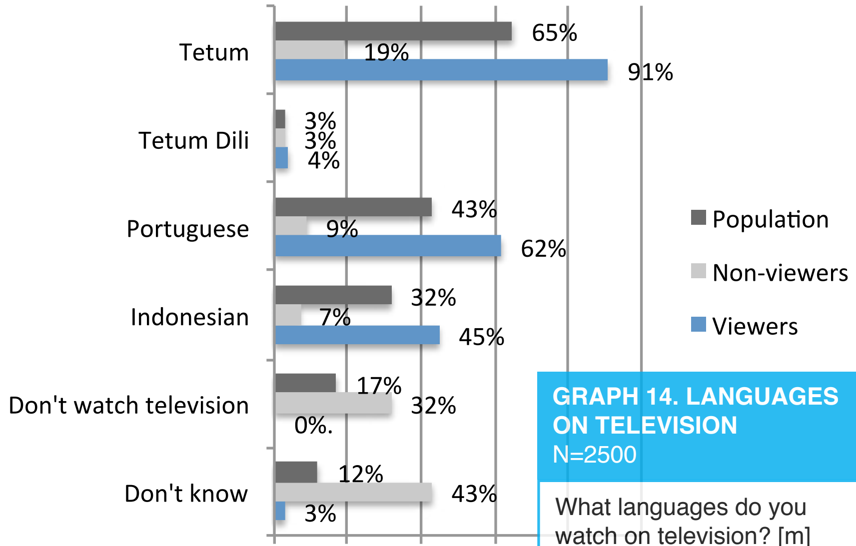
What languages do you prefer to listen to on radio? [s]

We asked respondents what language or languages they would prefer to listen to on the radio (**Graph 13**, right), to find out whether it is different than the statements shown above. Tetum is mentioned by 9 out of 10 respondents in this survey, similar to the 2006 survey.

Indonesian is mentioned by 34% of radio listeners, up from 29% in 2006. The percentage of listeners who mentioned Portuguese as a preferred language has tripled from 9% in 2006 to 29% today.

Languages on television

We asked all respondents about languages on television. The first question was what languages they use when watching television. Note that this question was not asked in the 2006 survey, and as with languages on radio we asked this question to all respondents in the early stage of the interview whether they watched television or not.



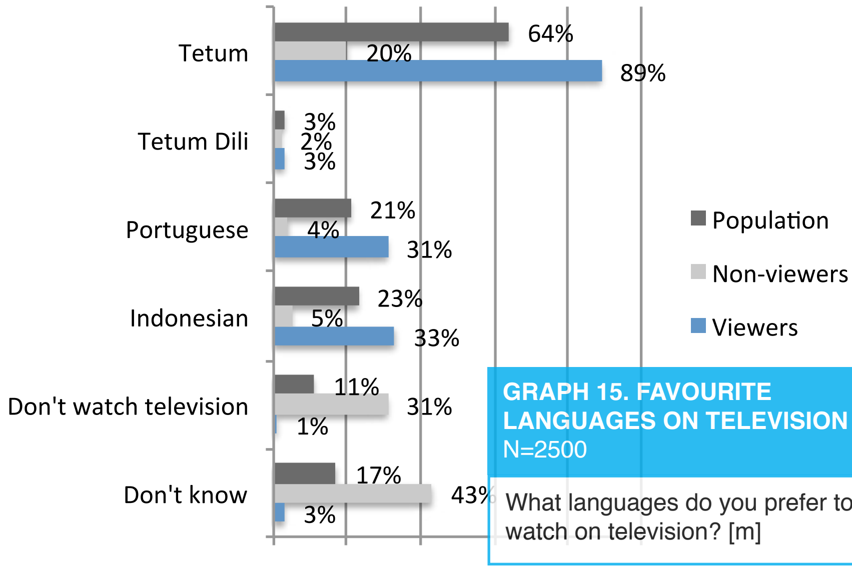
GRAPH 14. LANGUAGES ON TELEVISION
N=2500

What languages do you watch on television? [m]

Graph 14 organises the results according to whether respondents are or are not television viewers.

The majority (91%) stated they currently watch television in Tetum. 62% watch in Portuguese and 45% watch in Indonesian.

65% of non-viewers stated they are not watching or replied they don't know. Logically, all non-viewers should have responded they did not watch. But since the question was asked at the beginning of the interview, some respondents gave their opinion even though they don't actually watch television.



GRAPH 15. FAVOURITE LANGUAGES ON TELEVISION
N=2500

What languages do you prefer to watch on television? [m]

We asked everyone what their preferred language or languages on television would be and whether their preference mirrors the current situation.

Results on **Graph 15**, right, show that nine out of 10 respondents who are television viewers prefer Tetum; Indonesian is mentioned by one in every three viewers; and Portuguese is mentioned by 31% of television viewers.

Again, the majority of non-viewers stated either they don't watch television (31%) or don't know (43%).

The two questions on current use and preference for languages on television consistently show that the Timorese prefer Tetum.

One preferred language for media

The survey continued with a push question, a hypothetical situation where there could only be one language on television and radio and two languages for newspapers: what language(s) do they prefer? We asked these questions to all respondents regardless of whether they are consumers of these media or not.

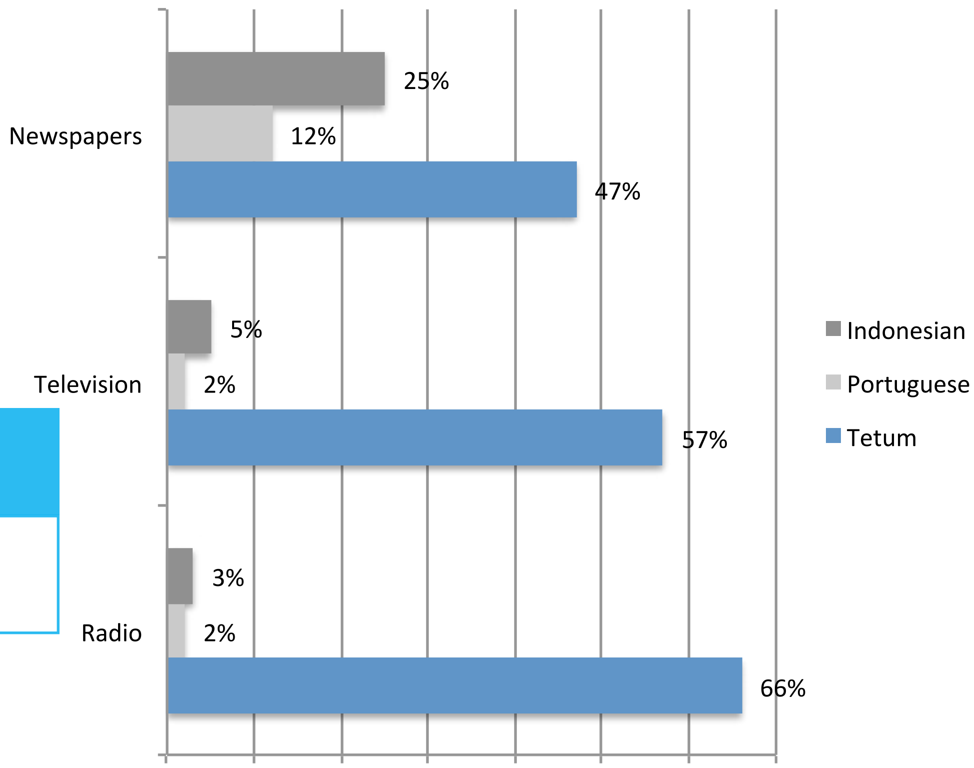
Graph 16 below shows Tetum is the preferred language for all three media: 66% for radio, 57% for television and 47% for newspapers. Note that because respondents could mention two languages for newspapers, 47% of respondents are equivalent to 81% of the literate population.

The percentages of respondents who prefer Portuguese or Indonesian on radio and television are low (5% or less). For newspapers, when given the option of choosing two languages, 25% of respondents (or 43% of literate population) said they prefer Indonesian, and 12% (or 21% of the literate population) stated a preference for Portuguese.

Interestingly, 15% and 19% of respondents replied they don't know when asked about preferred language on radio and television, while only 6% said they don't know for newspapers. This suggests that people have less confidence when confronted with the choice of one language compared with the choice of two languages in the newspaper question.

GRAPH 16. ONE FAVOURITE LANGUAGE FOR MEDIA
N=2500

If only one language were available, which one would you prefer for ...? [s]



Key conclusions on language use

- Timor-Leste is a multilingual society. Use of languages varies according to context: Tetum is used for interaction between regions and with foreigners, while local languages are used in their communities. The survey did not find demand for local languages other than Tetum in the media.
- Tetum remains the preferred language in the media for the majority of respondents, with a slight increase in preference. There was a considerable rise on the use of Portuguese, followed by a considerable drop on the use of Indonesian.
- Preference for Indonesian and Portuguese are now similar, with a slightly higher preference for Indonesian.

Focus groups findings on languages

- *Timor-Leste is linguistically diverse.*
- *The discussions illustrate that, in some areas, there are social sanctions, mockery and prohibitions to speaking other than local languages except when talking with people from "outside", in schools or when travelling to Dili.*
- *A strong desire for more formal classroom lessons in Tetum.*
- *Some see Portuguese as the language of the 'haves', the elites and the educated; hence 'have-nots', or ordinary people, should/need not to speak it.*
- *Some see foreign language skills as a prerequisite to excel in studies, business and life in general.*

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ACCESS TO AND TRUST IN INFORMATION SOURCES

Services and topics tested

One of the survey's objectives was to investigate the effectiveness of communication efforts conducted to increase public awareness and knowledge of various issues and services. Ten different issues and services were tested in this survey. These issues can be organised into two broad and overlapping groups:

A) Topics 1 to 5 relate to public services, which exist on an on-going basis. As services the public expect, and many of which affect their day-to-day lives, a degree of initiative in seeking information could be expected. For example, it is in the public's interest to actively seek information about cash payments for which they might qualify.

1. Programmes from the Ministry of Social Solidarity (MSS), such as *Bolsa da Mae, Idozu, Pakote Rekuperasaun, Bolsa Estudu, Pensaun* and others.
2. Health (immunisation programmes, illnesses like dengue/malaria, maternal health, new-born children's health)
3. Policing (how to contact police, how police can help, police activities/actions)
4. Agriculture Services (support from government or NGOs, *Fini Foun, Povu Kuda Governu Sosa*)
5. Justice (information about new laws, results of trials in Dili and districts, and human rights)

B) Topics 6 to 10 are more specific, time-limited situations or projects, introduced through public information campaign or efforts. With the exception of rice from MTCI, these topics are less directly connected to people's daily lives, so responses to these topics may indicate more of a response directly to the public information effort in question and less to self-initiated inquiry.

6. *Suku* elections (electoral calendar, registration, participation, results)
7. Resumption of policing responsibility by PNTL
8. Rice from the Ministry of Tourism, Commerce and Industry (MTCI)
9. Consultation on domestic violence law
10. '*Ita Nia Rai*' programme (land and property programme, including declaring and measuring one's land)

Detailed descriptions of each topic are given with the findings on pages 26 to 33.

Recognition of services and issues

We identified percentages of the adult population who are aware of the topics mentioned previously, and available information sources. We also identified the sources people most trust.

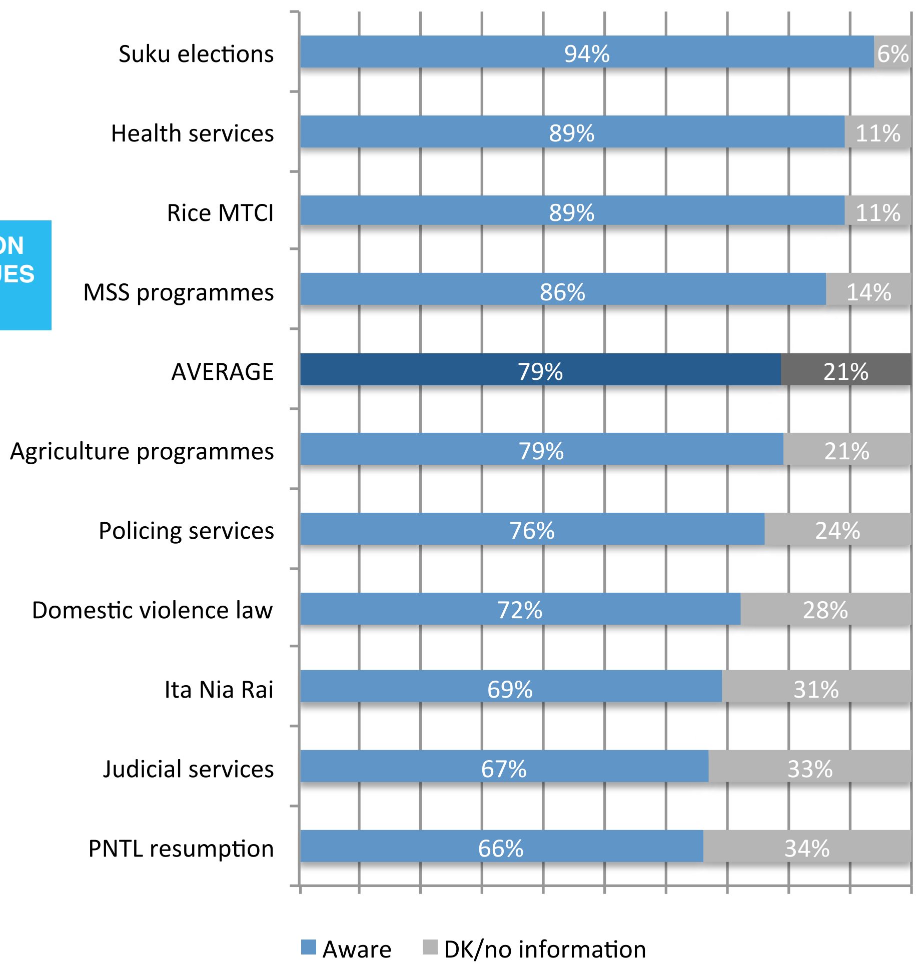
Graph 17 lists all 10 issues and services tested. The survey found that the majority of respondents recognise and have received information about the topics. The source of information about each issue will be discussed in the following pages.

The most recognised topic was *suku* elections where 94% stated they received information. Subsidised rice from MTCI, health services and the Ministry of Social Solidarity programmes are also recognised by 86% to 89% of respondents.

Recognition of agriculture services is 79%, policing services is 76% and domestic violence law consultation is 72%.

Even the lowest three responses for recognition were all above 65%. *Ita Nia Rai* received 69%. Judicial services were 67% and transfer of responsibility from UNPOL to PNTL was 66%.

GRAPH 17. RECOGNITION OF SERVICES AND ISSUES
N=2500



Most-accessed and most-trusted sources of information

The survey used an open-ended question to ask where respondents receive information from on each topic; and a second, single answer, question to determine which of these sources they trust or believe most. There is a wide range of sources of information; some are specific to the issue/ services and others are general. Detailed results for each topic are presented on the following pages. Three sources of information are consistently referred to by significant percentages of respondents as sources of information for all topics: community leaders, radio and television.

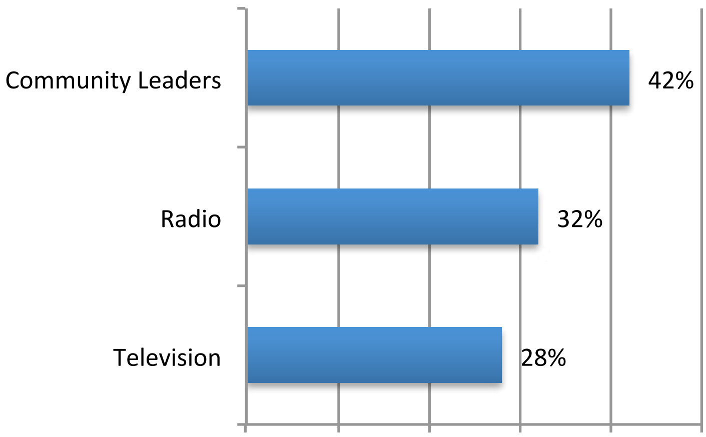
Graph 18 shows the average percentages of respondents mentioning the source. "Community leaders" are mentioned as sources of information for all tested issues and services by an average of 42% of respondents. Radio was mentioned by an average of 32%, while television was mentioned by an average of 28%.

Graph 19 shows the average each source was mentioned as most trusted. Community leaders are on top, averaging 33%. Interestingly, television is 20%; above radio at 11%.

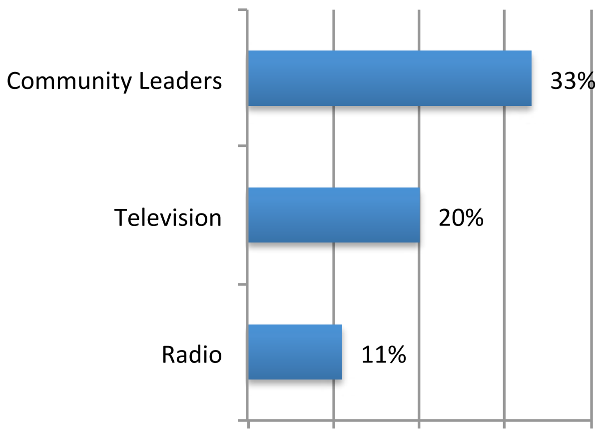
Posters, banners and public boards are mentioned by less than 2% of people as a source of information for these issues.

Focus groups findings on sources of information

The focus groups indicates that television is considered more credible and powerful in delivering information – a condition that is common in other places in the world. This is indicated by the fact that, in television, audiences are able to visually identify the speaker.



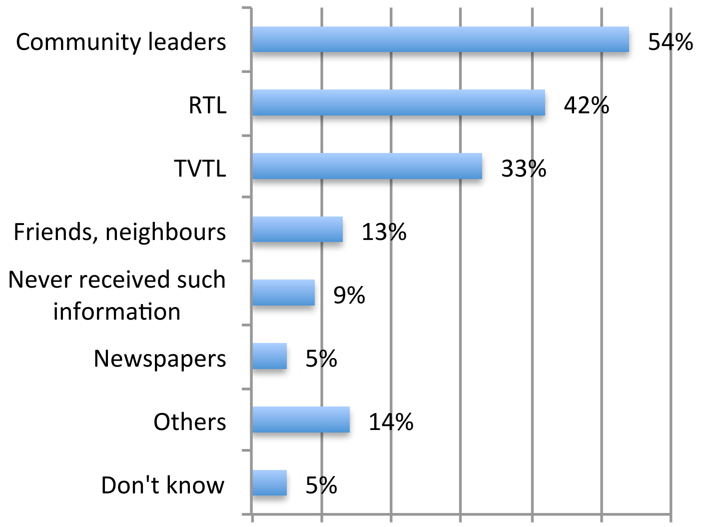
GRAPH 18. SOURCES OF INFORMATION
Average



GRAPH 19. MOST TRUSTED SOURCE OF INFORMATION
Average

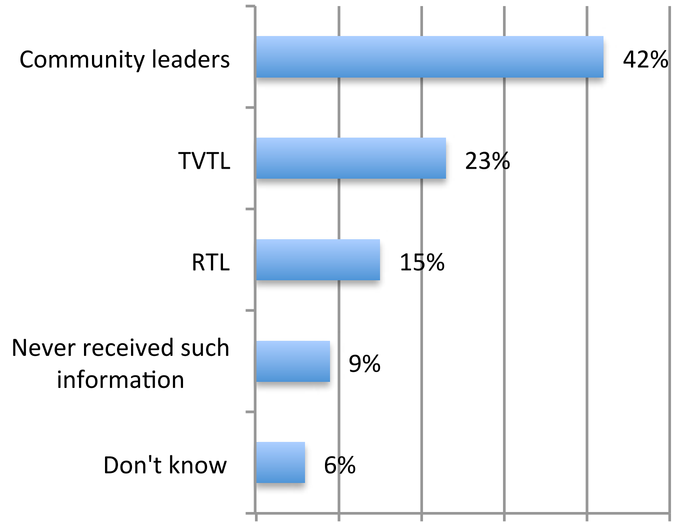
1. **Programmes from the Ministry of Social Solidarity (MSS) (*Bolsa da Mae, Idozu, Pakote Rekuperasaun, Bolsa Estudu, Pensaun*)**

Social initiatives managed by the Ministry of Social Solidarity (MSS) have featured highly in Timor-Leste in recent years. Their communication and outreach strategies have included radio, television and print as well as face-to-face meetings.



SOURCES OF INFORMATION
N=2500. MSS programmes

How do you get information on MSS programmes? [m]

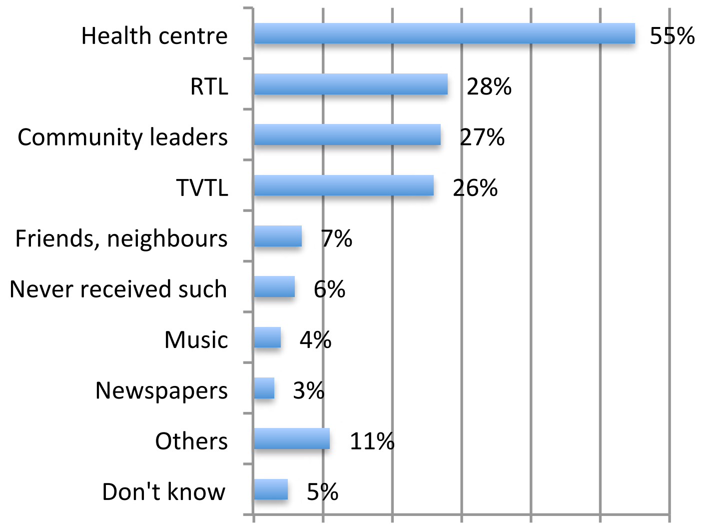


MOST TRUSTED SOURCE OF INFORMATION
N=2500. MSS Programmes

What is your most reliable source of information on MSS programmes? [s]

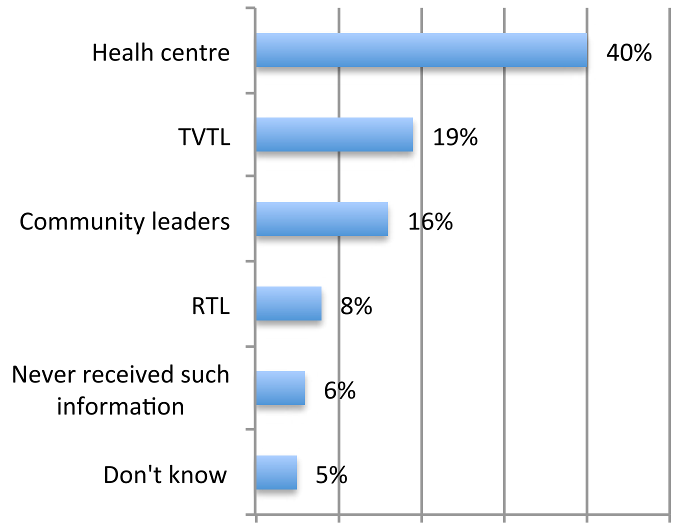
2. **Health services**

This topic includes health campaigns, including vaccinations, prevention against malaria and dengue, and maternal and child health. These actions, broadly connected to the Ministry of Health, have all received public communication efforts across the media, and through face-to-face meetings.



SOURCES OF INFORMATION
N=2500. Health services

How do you get information on health services? [m]



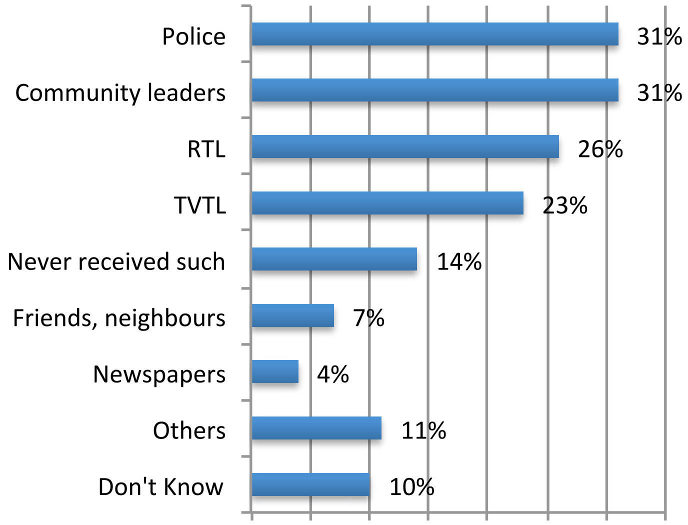
MOST TRUSTED SOURCE OF INFORMATION
N=2500. Health services

What is your most reliable source of information on health services? [s]

3. Policing services

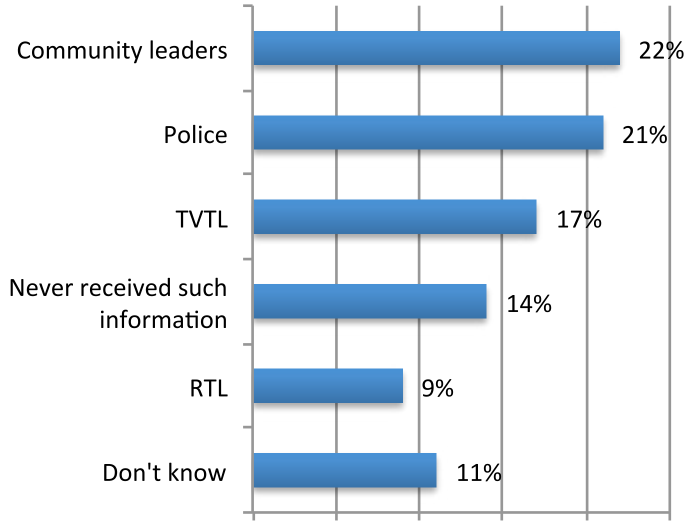
How to contact the police? How can the police help you? What are their activities? Policing regularly features in UNMIT information products. Community policing is a key element of PNTL's work.

Note that no distinction was made in this question between PNTL and UNPOL.



SOURCES OF INFORMATION
N=2500. Policing services

How do you get information on policing services? [m]

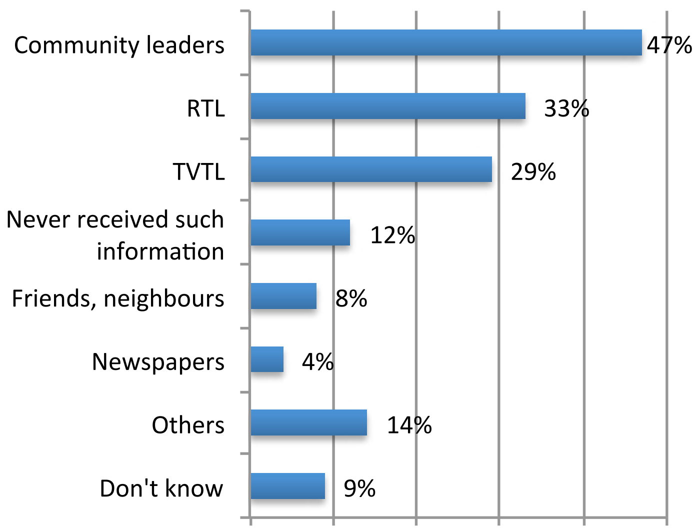


MOST TRUSTED SOURCE OF INFORMATION
N=2500. Policing services

What is your most reliable source of information on policing services? [s]

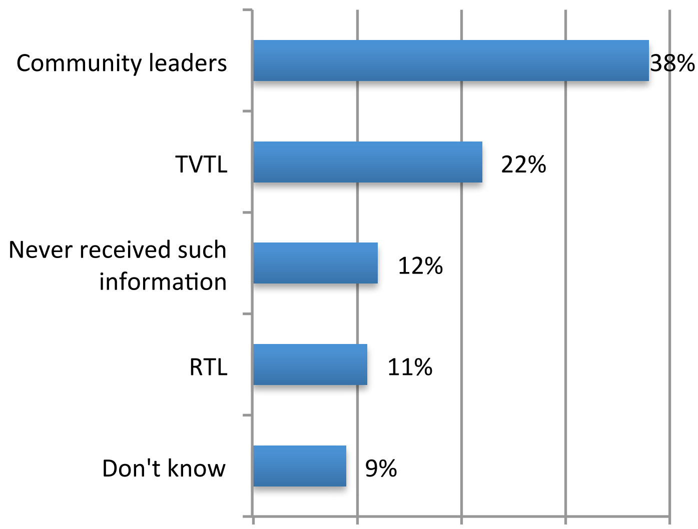
4. Agriculture programmes (subsidies, support programmes)

This question tested for recognition of initiatives such as the '*Povu kuda, Governu sosa*' ('People plant, Government buys') programme, '*Fini Foun*' ('new seeds') and other forms of support from the government or NGOs. These are related to the Ministry of Agriculture.



SOURCES OF INFORMATION
N=2500. Agriculture programmes

How do you get information on agriculture programmes? [m]

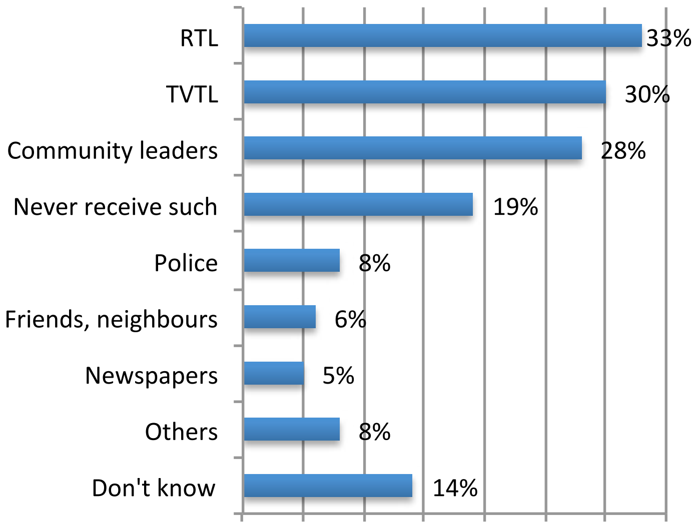


MOST TRUSTED SOURCE OF INFORMATION
N=2500. Agriculture programmes

What is your most reliable source of information on agriculture programmes? [s]

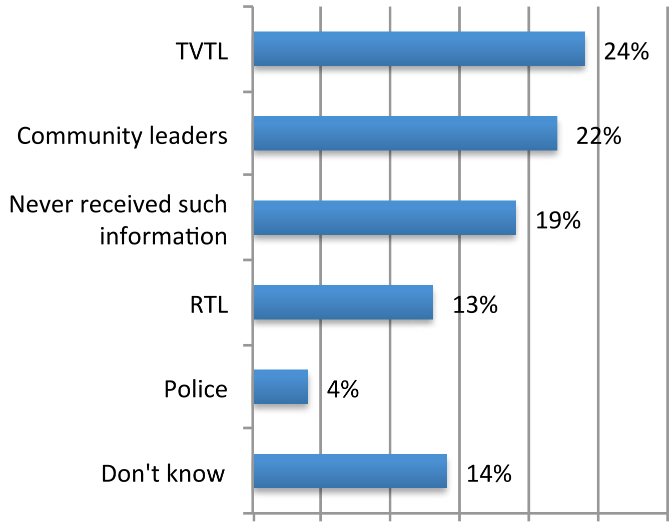
5. Judicial services and human rights

This question tested how people get information about new laws, court case results in Dili and districts, and human rights. These questions were primarily related to the courts (including in the districts and the Court of Appeals), but are also relevant to the Human Rights Ombudsman, Public Defender's and Public Prosecutor's offices.



SOURCES OF INFORMATION
N=2500. Justice and human rights

How do you get information on justice and human rights? [m]



MOST TRUSTED SOURCE OF INFORMATION
N=2500. Justice and human rights

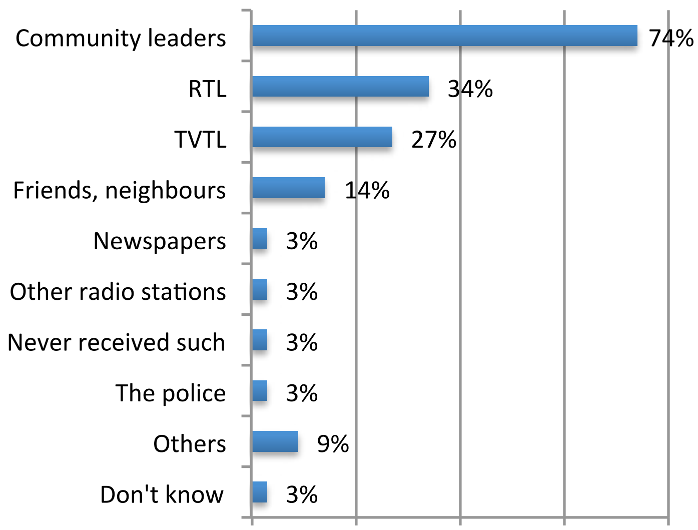
What is your most reliable source of information on justice and human rights? [s]

6. *Suku* elections

Local elections were held for the second time in Timor-Leste on 9 October 2009. This was the subject of large-scale, national civic education and public information campaigns.

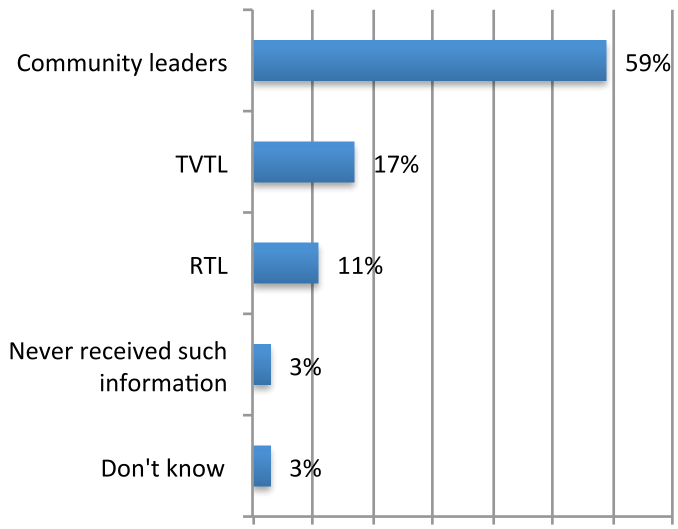
Public information campaigns began in May 2009 and included community meetings, posters and radio and television spots.

STAE and CNE, with support from the UN Electoral Support Team (UNEST), developed public information campaigns for voter registration, civic education sessions, awareness and procedures for Polling Day, and socialization of results. Public information materials were also developed and distributed with support of all UNMIT (the Communication and Public Information Office in particular). Based on provisional results[10], 67.75% of registered voters came to the polls and voted on this election.



SOURCES OF INFORMATION
N=2500. *Suku* elections

How do you get information on the *suku* elections? [m]



MOST TRUSTED SOURCE OF INFORMATION
N=2500. *Suku* elections

What is your most reliable source of information on the *suku* elections? [s]

[10] *CNE (National Electoral Commission). 2009* Suku *Elections, Sub-district Statistical Data (*Dados Estatísticos por Subdistrito*), 04 December 2009.*

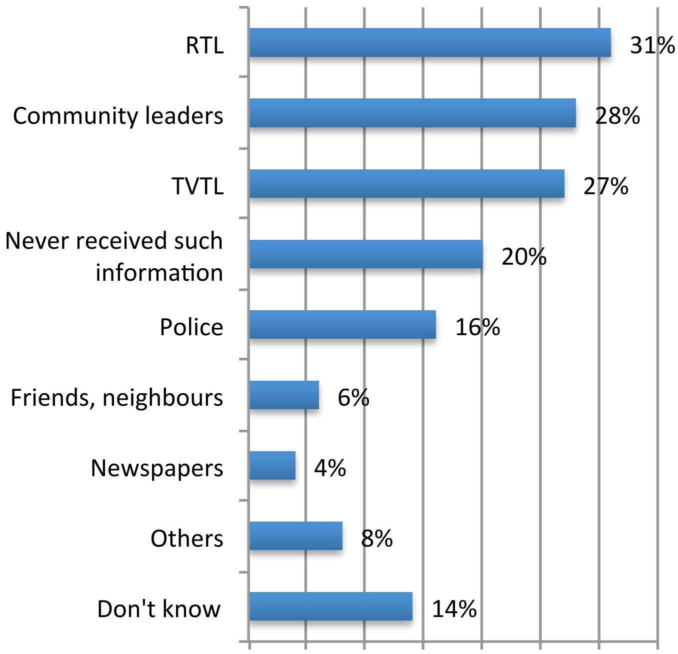
7. Resumption of responsibility by PNTL

Previously, UNMIT's mandate included responsibility for policing throughout Timor-Leste. UNMIT and the Government of Timor-Leste started a gradual transfer of primary policing authority from UNPOL back to the Timorese National Police (PNTL). The process was organised and phased according to district command and specialized units, and began in 2009. This process was concluded in March 2011.

At the time of the fieldwork (May 2010), only some districts had been transferred. However, all districts received some information from UNMIT (including newsletter, radio and television programmes, and a flier) and the topic received high levels of media attention.

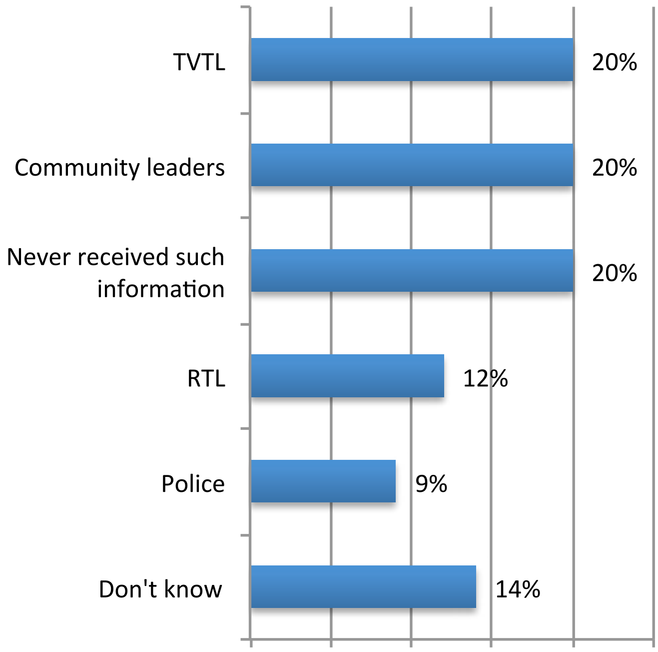
In the following districts and units, PNTL had resumed primary policing responsibility before the fieldwork:

- Lautem, 14 May 2009
- Oecusse, 30 June 2009
- Manatuto, 25 July 2009
- Police Training Centre (Dili), 11 Set 2009
- Viqueque, 05 Dec 2009
- Maritime Unit (Dili), 14 Dec 2009
- Police Intelligence Service (Dili), 18 Dec 2009
- Ainaro and Baucau, 12 April 2010



SOURCES OF INFORMATION
N=2500. Police resumption

How do you get information on the police resumption? [m]

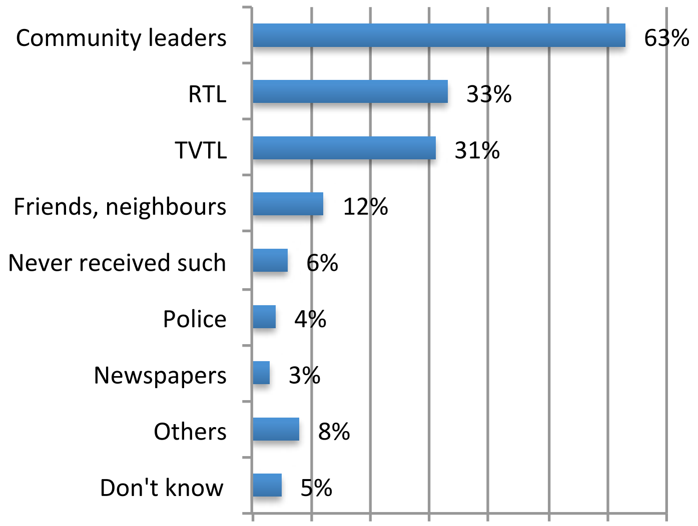


MOST TRUSTED SOURCE OF INFORMATION
N=2500. Police resumption

What is your most reliable source of information on the police resumption? [s]

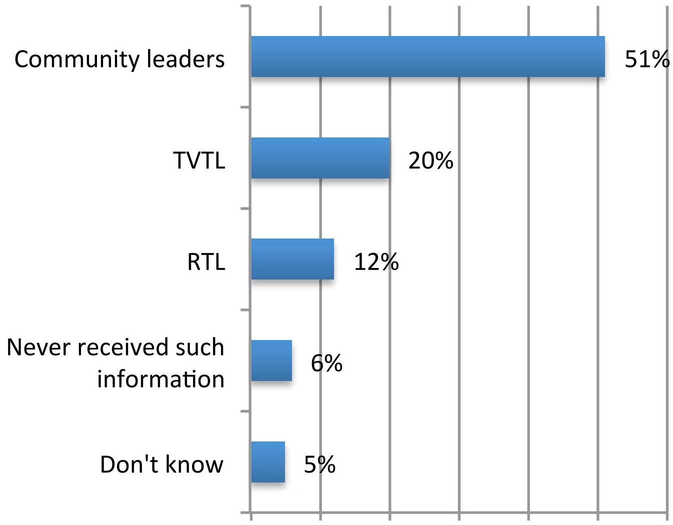
8. MTCI rice programme

The Ministry of Tourism, Commerce and Industry (MTCI) temporarily sold rice at subsidised prices to improve food security in Timor-Leste. This rice was sold at fixed prices in Dili. MTCI made efforts to ensure that the final price of the rice at the sub-districts level was low and distribution was efficient. This topic was widely covered in the media.



SOURCES OF INFORMATION
N=2500. MTCI rice programme

How do you get information on the MTCI rice programme? [m]

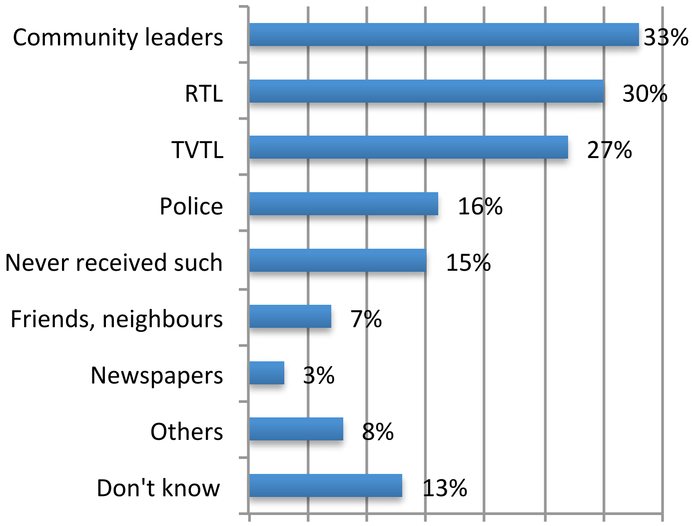


MOST TRUSTED SOURCE OF INFORMATION
N=2500. MTCI rice programme

What is your most reliable source of information on the MTCI rice programme? [s]

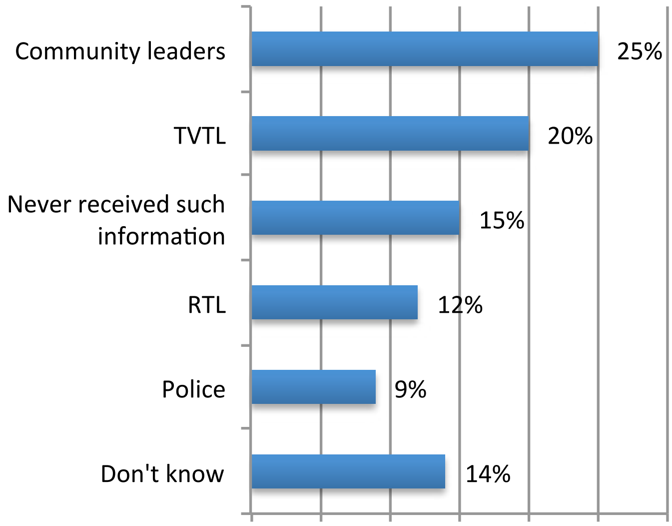
9. Consultation on domestic violence law

The Ministry of Justice, NGOs and UN agencies conducted public meetings to discuss the draft law against domestic violence, throughout all 13 districts of Timor-Leste during 2009/10. The Government of Timor-Leste, civil society and UN agencies also promoted the "16 Days of Campaign Against Violence Against Women" from 25 November to 10 December 2009. The domestic violence draft law was an important topic in the 2009 campaign. Communication efforts included printed banners, postcards and other materials, as well as meetings and workshops.



SOURCES OF INFORMATION
N=2500. Domestic violence law

How do you get information on the domestic violence law? [m]

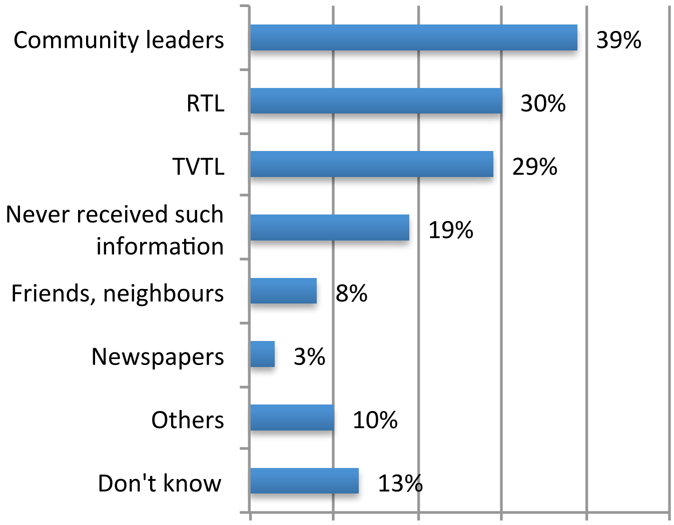


MOST TRUSTED SOURCE OF INFORMATION
N=2500. Domestic violence law

What is your most reliable source of information on the domestic violence law? [s]

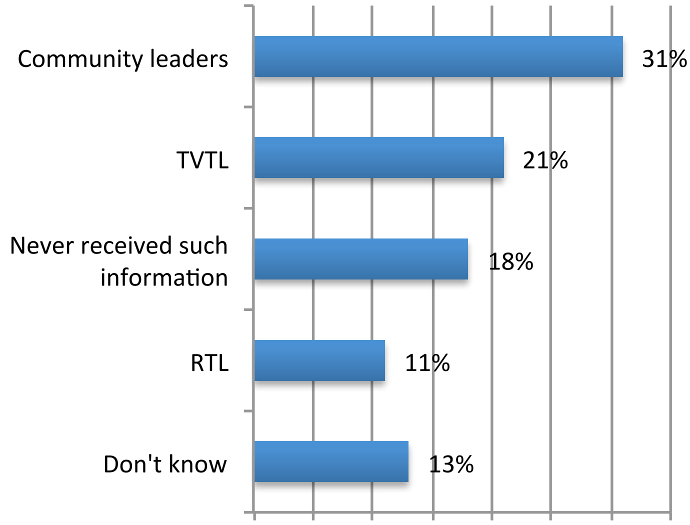
10. '*Ita Nia Rai*' programme

The Ministry of Justice and the Land and Property Department of the Ministry of State Administration have a long-term project to solve disputes over land ownership. This programme includes different communication strategies, from radio programmes to socialization meetings, and mediation sessions. 'Strengthening Property Rights in Timor-Leste (known locally as the "*Ita Nia Rai*" or "Our Land" programme) is a five-year (2007-2012) programme funded by the United States Agency for International Development (USAID). Working with the National Directorate for Land, Property and Cadastral Services (DNTPSC) and the Ministry of Justice, the programme provides technical and policy support to develop a sustainable and transparent property rights system in Timor-Leste'[11]. The communication strategy of this programme includes all media, as well as face-to-face meetings.



SOURCES OF INFORMATION
N=2500. *Ita Nia Rai*

How do you get information on the *Ita Nia Rai* programme? [m]



MOST TRUSTED SOURCE OF INFORMATION
N=2500. *Ita Nia Rai*

What is your most reliable source of information on the *Ita Nia Rai* programme? [s]

Key conclusions on information sources

- All issues where recognition was tested received very high recognition rates (all above 65%), which reflects positively on information campaigns and efforts.
- Community leaders, followed by radio and television, are consistently the most accessed and most trusted sources of information.
- Posters and banners received very low or zero recognition.

[11] www.itaniarai.tl/ – *Accessed January 2011.*

Focus groups findings on communication strategies and sources

- *Participants believe people are obtaining more information from the media (television and radio), although some people still obtain information from traditional leaders.*
- *Non-users of media rely heavily on traditional leaders and word-of-mouth information.*
- *People value the power of live pictures; people trust television and perceive it as accurate and up-to-date.*
- *Focus groups recorded complaints about inaccuracy and low quality of news reporting. There were criticisms about a lack of reporting from events occurring in remote areas.*

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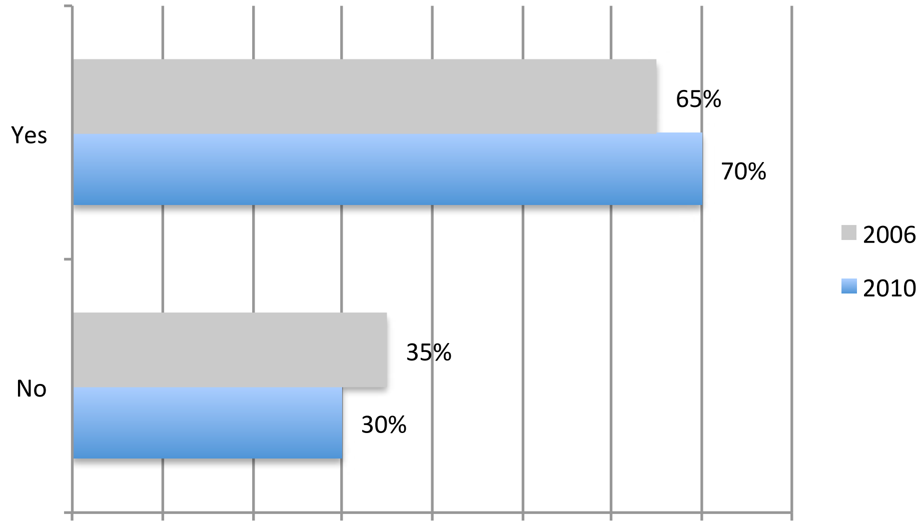
RADIO



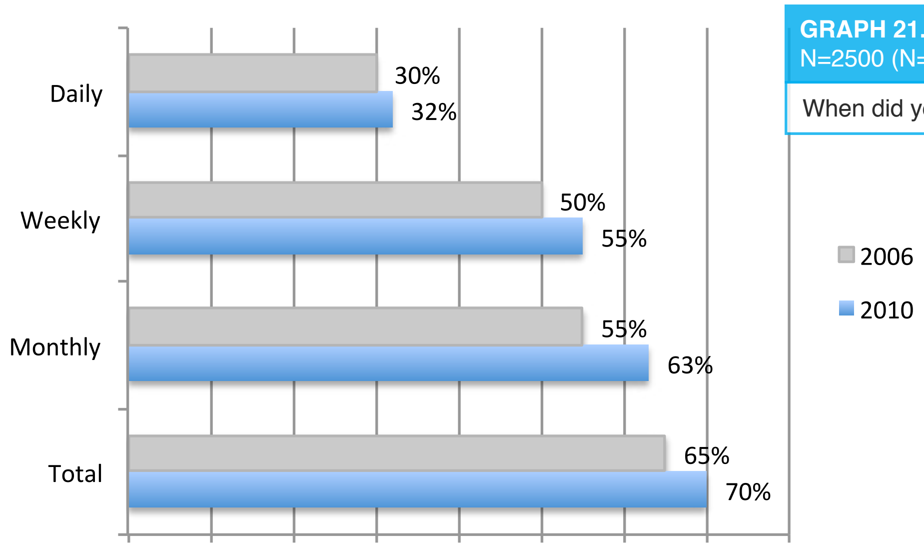
GRAPH 20. RADIO REACH
N=2500 (N=1272 in 2006)

Have you ever listened to the radio? [s]

Radio reach

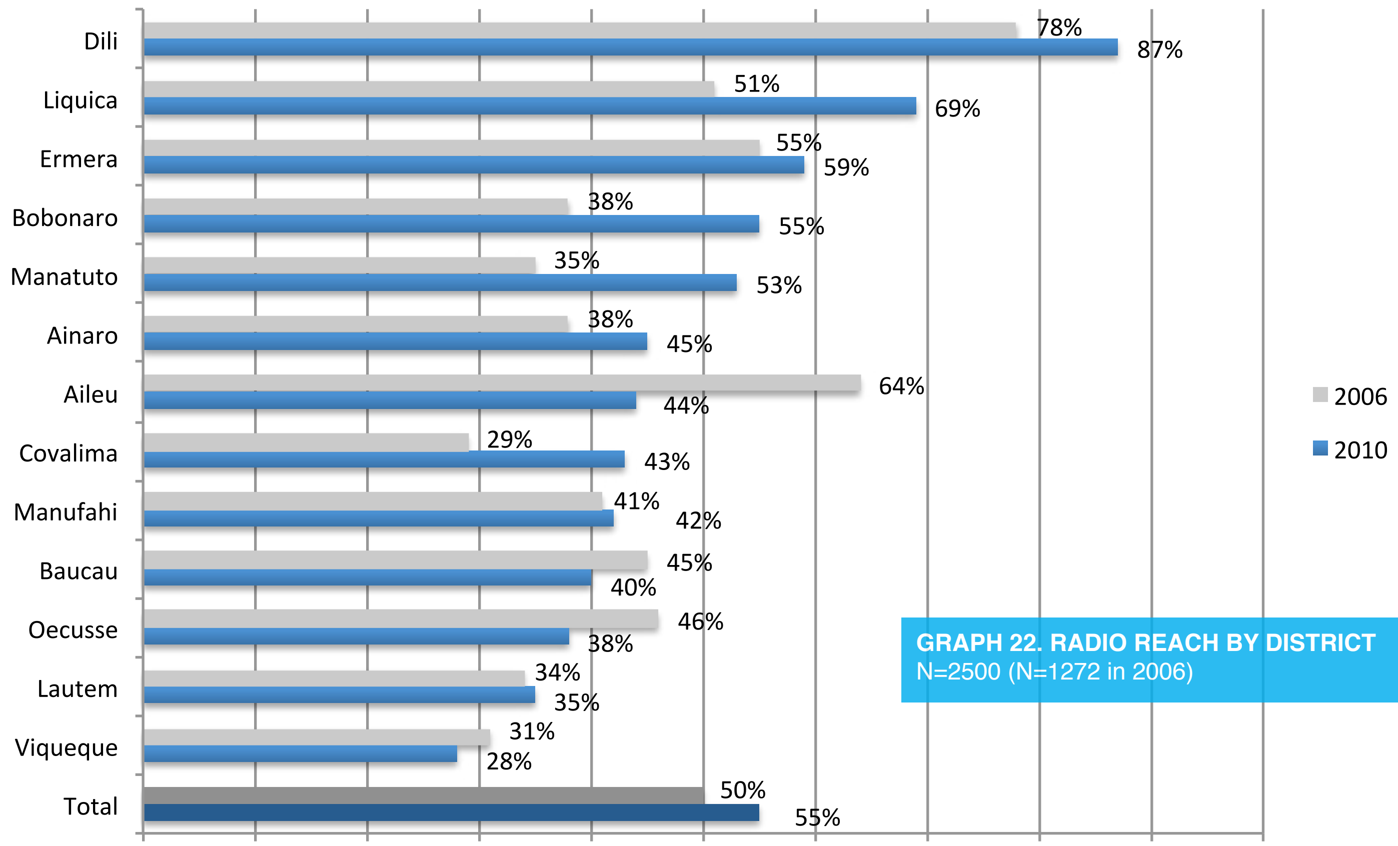
The survey asked several questions to measure the reach of radio in Timor-Leste. What is the percentage of the population which ever listened to the radio? What are the monthly, weekly, and daily reaches (those who listened at least once a month, a week or a day, respectively)? Has the proportion increased compared to the 2006 survey? Results are shown below.

Graph 20 above shows that 70% of the population have now listened to the radio at some point in time – increased from 65% in 2006. Monthly reach of radio now is 63%, again up from 55% in 2006. **Graph 21** below shows that the percentage of the population that can, in theory, be reached by a one-week radio campaign is now 55%, up from 50% in 2006. In total, the daily reach has increased by only 2 percentage points to 32% of the population – close to the survey margin of error of 1.95%, indicating that this growth was marginal.



GRAPH 21. RADIO REACH COMPARISON
N=2500 (N=1272 in 2006)

When did you last listen to radio? [s]

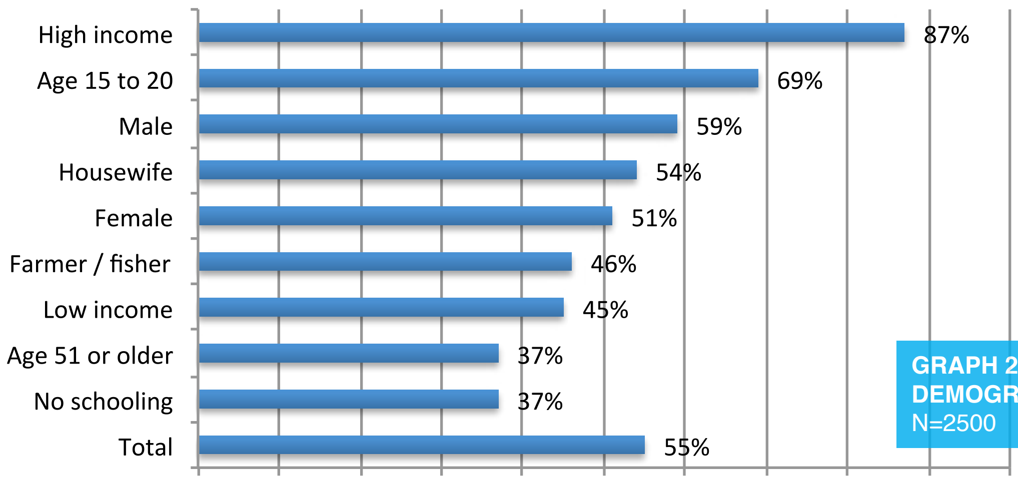


GRAPH 22. RADIO REACH BY DISTRICT
N=2500 (N=1272 in 2006)

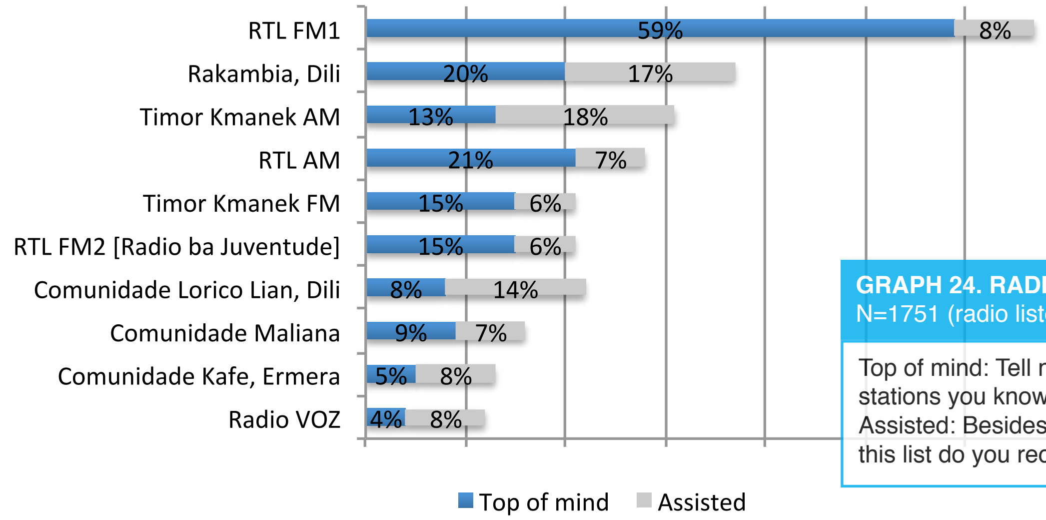
Further analyses show variations of radio reach across the districts, as show in **Graph 22**, above. Weekly reach has increased in most of the districts; Bobonaro has increased from 38% to 55%; Covalima has increased from 29% to 43%. However, there are districts where weekly reach has decreased, Aileu being the most significant where weekly reach has dropped from 64% in 2006 to 44% in 2010. Please note that we interviewed 100 respondents in Aileu, so the sampling error for that district's specific data is significantly higher (approximately 9.8%).

We looked at the crosstabs to see weekly reach of radio among key demographic groups. As **Graph 23**, below, shows, nine in 10 high-income respondents listen to radio at least once a week, against 45% for low income.

Weekly reach of radio among males is higher than among females (59% versus 51%). Weekly reach among housewives is 54%, and among farmers and fishers, the largest occupational group, is 46%.



GRAPH 23. RADIO REACH ACROSS DEMOGRAPHIC GROUPS
N=2500



GRAPH 24. RADIO STATION AWARENESS
N=1751 (radio listeners)

Top of mind: Tell me the names of all radio stations you know of. [m]
Assisted: Besides those, what stations from this list do you recognise? [m]

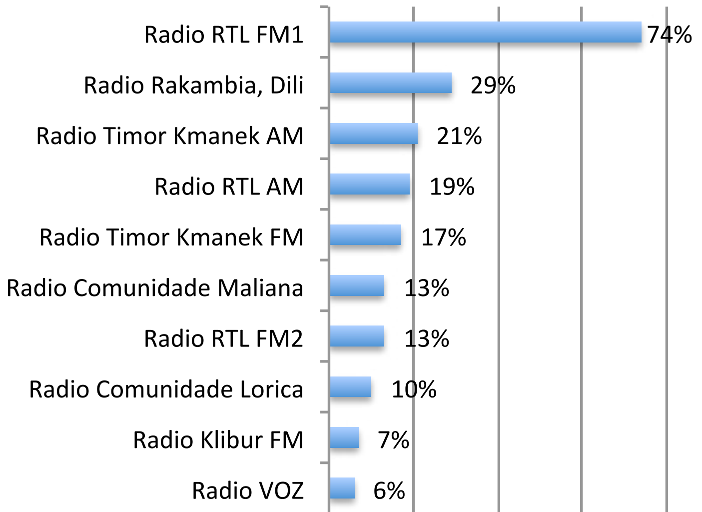
Station awareness

The survey measured radio listeners' awareness of radio stations in Timor-Leste. We tested 36 different radio stations, first by asking an open-ended question: "Can you tell me names of all radio stations you can think of?" to measure spontaneous awareness (referred to in the graph as 'top of mind'). We then prompted the other stations that had not been named by respondents to the first question to measure 'assisted' awareness. Please note that the ability to name a radio station name does not necessarily mean respondents actually listen to that station.

Graph 24, above, shows 10 radio stations with high levels of recognition. 67% of radio listeners are aware of RTL FM1, the same percentage as in 2006. Two stations in the top three spots are private: 37% total awareness for Radio Rakambia (up from 24% in 2006), and 31% total awareness of Radio Timor Kmanek FM (down from 39% in 2006).

Data also suggest community radios (*radio comunidade*), naturally local in their reach and appeal, receive considerable recognition in their areas. Local radios stations Radio Comunidade Lorico Lian Dili (17% total), Comunidade Maliana (16% total) and Comunidade Ermera (13% total) made it into the national top 10.

Consistent with the result of the previous question, we found that 74% of listeners said they have listened to RTL FM1 (see **Graph 25**, right). Next highest responses were for Radio Rakambia (29%) and Radio Timor Kmanek AM (21%). RTL AM received 19% and Kmanek FM, 17%.



GRAPH 25. STATIONS LISTENED TO
Top 10. N=1751 (radio listeners)

Which of these stations have you ever listened to? [m]

Listener participation programmes

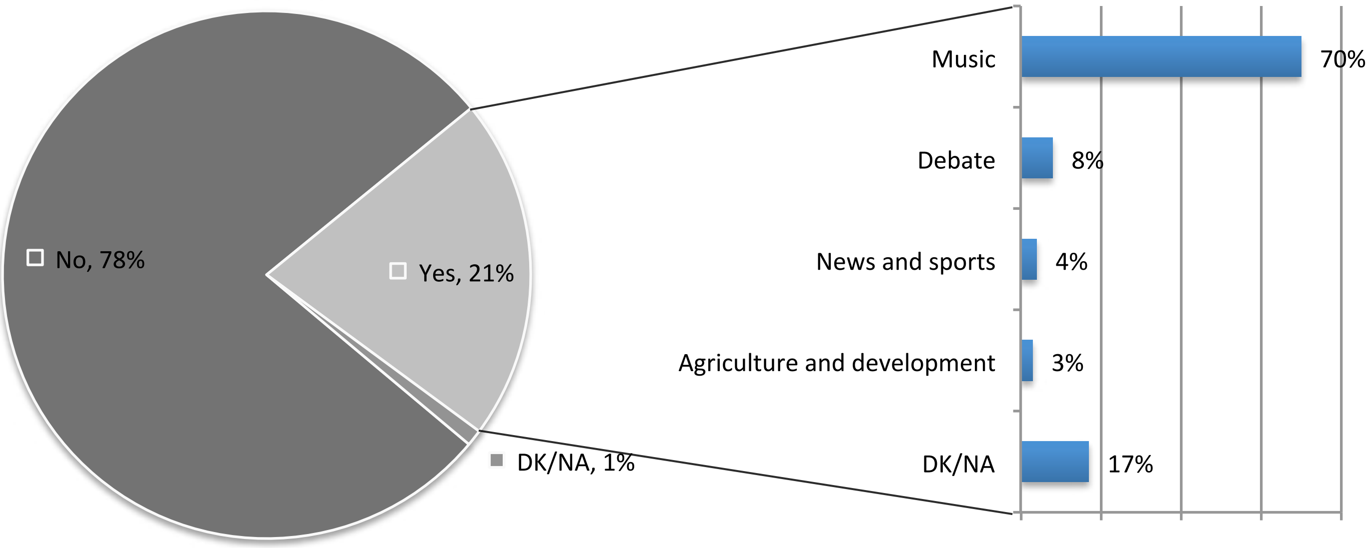
The survey asked radio listeners whether they ever listened to listener participation programmes. We found that only two out of 10 listeners had listened to such programmes (**Graph 26**, below left). This question was asked in 2006 but to RTL listeners only, thus findings are incomparable.

GRAPH 26. LISTENERS PARTICIPATION PROGRAMMES
N=1751 (radio listeners)

Have you ever listened to listener participation programmes? [s]

GRAPH 27. PARTICIPATION PROGRAMME LISTENED TO
N=371 (participation programme listeners)

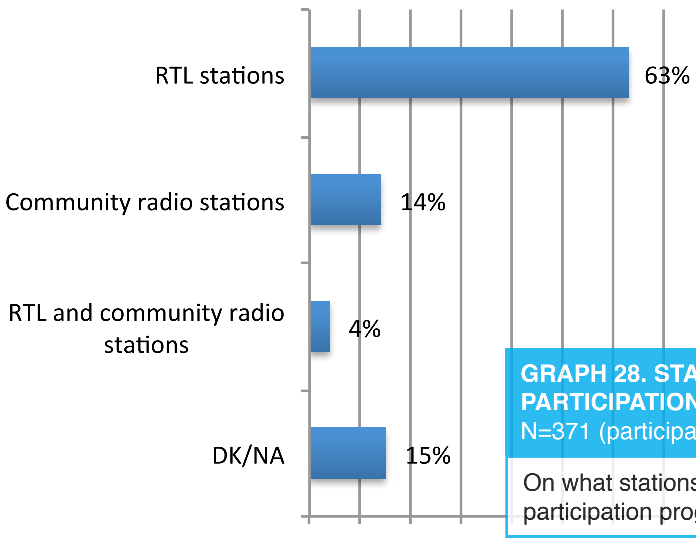
What programme was that? [m]



We asked those who said they have heard of such programmes what the topics were and which stations were airing the programme. Results are presented in **Graph 27**, above right.

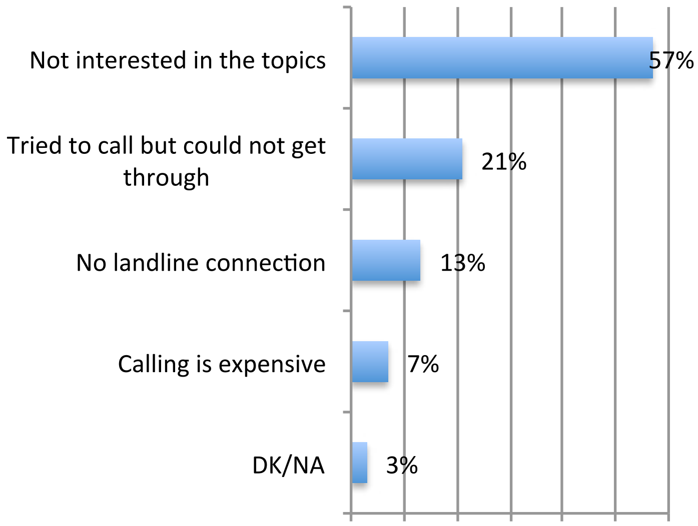
Most (70%) of those who are aware (or 14% of all radio listeners) stated the participation programme was about music requests. 8% (or 2% of all radio listeners) said it was a debate programme. A very low number of listeners stated participation programmes about news, sports, agriculture or development.

We asked those who were aware of such programmes what station was airing them. The survey found that 63% of these respondents (12% of all radio listeners) listened to a participation programme on RTL (**Graph 28**, left). 14% (3% of all listeners) stated they heard it on a community radio. About the same proportion forgot or was unable to say which station was airing the programme.



GRAPH 28. STATIONS WITH LISTENER PARTICIPATION PROGRAMMES
N=371 (participation programme listeners)

On what stations have you listened to participation programmes? [m]



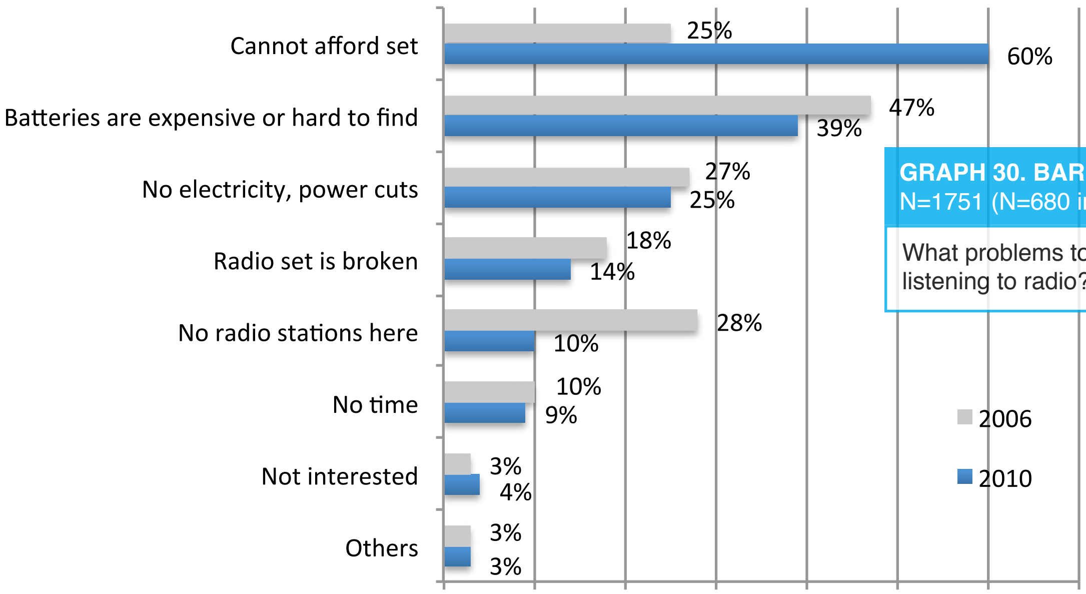
GRAPH 29. REASONS TO NOT PARTICIPATE
N=371 (participation programme listeners)

What are the main reasons for not participating in these programmes? [m]

The survey then asked respondents who are aware whether they had actually taken part in participation programmes. We found that only 30% (6% of all listeners) have actually participated in programmes.

The survey asked why respondents did not participate (**Graph 29**, left). 57% of those who did not participate (or 9% of all radio listeners) said they were not interested in the topics; the other 40% (7% of listeners) gave reasons related to call problems such as difficulties in getting through, no connection and cost of call.

Barriers to listening



GRAPH 30. BARRIERS TO RADIO
N=1751 (N=680 in 2006) (radio listeners)

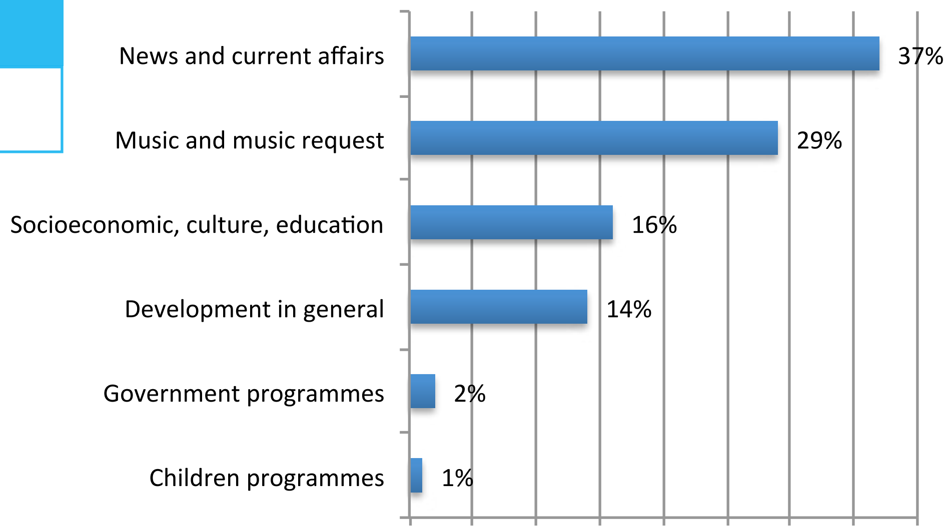
What problems to you face when listening to radio? [m]

Radio listeners were asked whether they encounter any problems when listening to the radio. Results are shown in **Graph 30**, above. Although half (49%) of radio listeners said they encounter problems, this is down from 70% of listeners who stated this in the 2006 survey.

Data suggests that the main problems when listening to radio are cost-related: 60% of listeners stated they cannot afford a radio – up from 25% in 2006; four out of 10 listeners (39%) stated batteries are too expensive – down from half (47%) who stated this in 2006. It is promising to find that the percentage of listeners who stated that there was no station to listen to has decreased from 28% in 2006 to only 10% today. This suggests improved access throughout the country.

GRAPH 31. PROGRAMMES MOST LISTENED
N=1751 (radio listeners)

What programmes do you most often listen to on radio? [m]

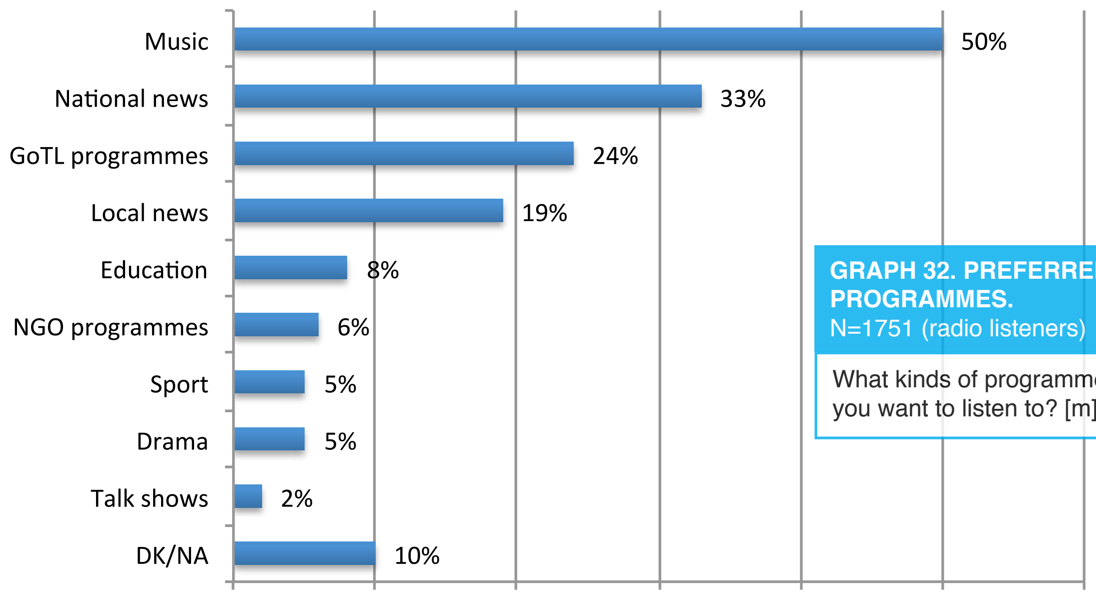


Programme preferences

The survey asked what kind of radio programmes people listened to most often. **Graph 31**, above, shows that 37% of listeners stated they most often listen to news and current affairs programmes. 29% of respondents listen to music programmes – a percentage that is higher among female and younger respondents. Socioeconomic, cultural and education programmes are listened to by 16%, while development programmes are listened to by 14%.

We then asked what kind of programmes listeners want to hear (**Graph 32**, below). Half of all listeners said they would like to hear music. For reference, note that 28% of listeners to RTL in 2006 stated they wanted to hear music in the 2006 survey.

One in three respondents said they would like to listen to national news, while local news was mentioned by 19% of respondents. Combined, this means 52% of respondents stated they wanted to hear news on the radio. 72% of RTL listeners in 2006, stated they wanted to listen to news in the 2006 survey. Note that the way the question was asked in the two surveys is different.



GRAPH 32. PREFERRED PROGRAMMES.
N=1751 (radio listeners)

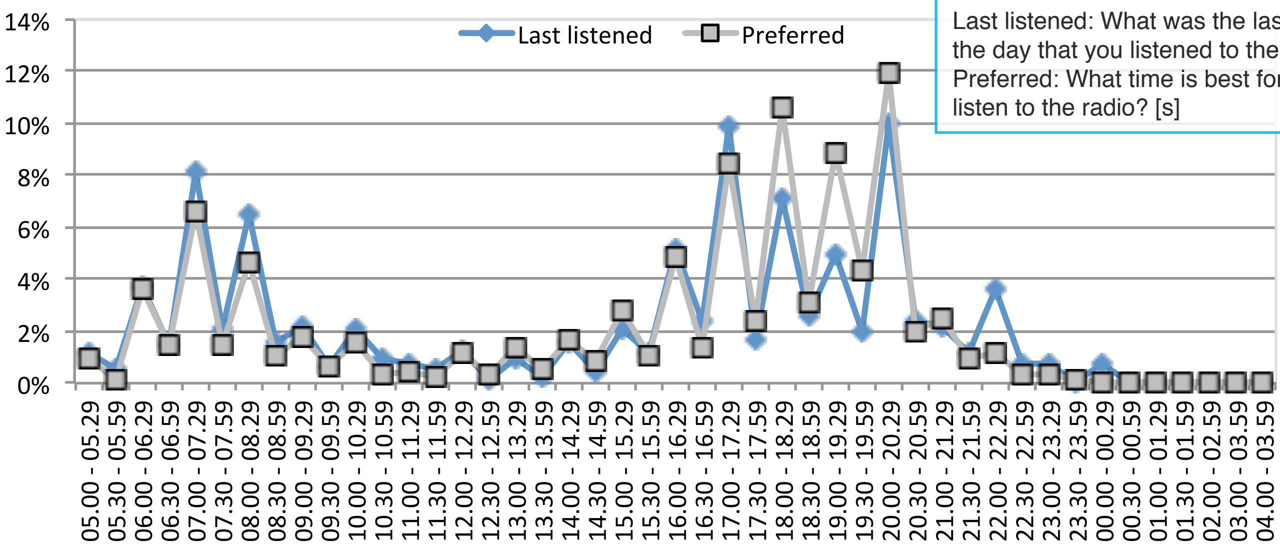
What kinds of programme do you want to listen to? [m]

This document does not represent the official views of UNMIT or the United Nations Organisation.

Listening time and venue

GRAPH 33. RADIO LISTENING TIMES
N=1751 (radio listeners)

Last listened: What was the last time of the day that you listened to the radio? [s]
Preferred: What time is best for you to listen to the radio? [s]



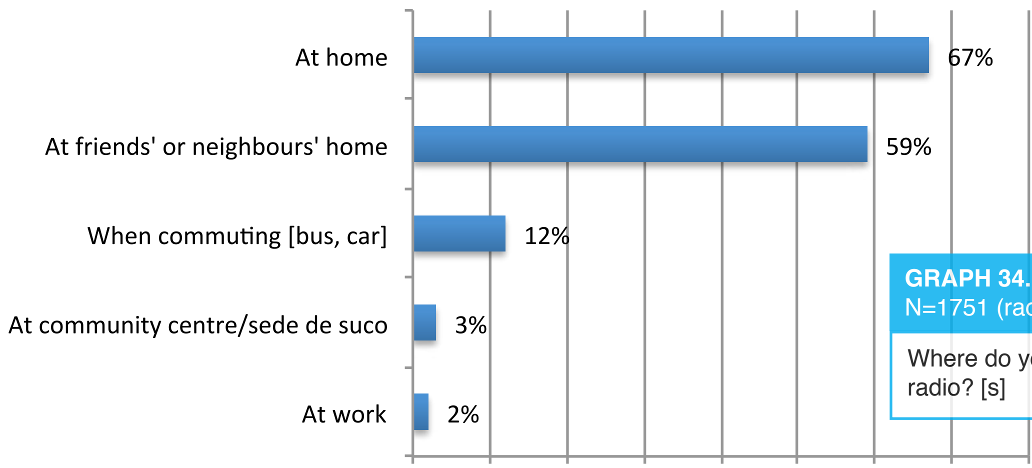
The survey asked radio listeners what was the last time they listened to a radio and what would be the best time to do so.

As show in **Graph 33**, above, the survey found there are two peak times for listening to radio: first, in the morning between 06:00-08:30; and secondly, in the afternoon, when an even higher percentage of listeners tune in between 16:00-20:30. Data show consistency between last listened and preferred time. Data also suggest this condition has not changed since 2006.

We asked respondents where they usually listen to radio. As shown on the **Graph 34**, below, 67% of radio listeners listen to the radio at home. 59% listen to it at friends' or neighbours' houses.

12% of listeners listen to the radio while on travel or commuting.

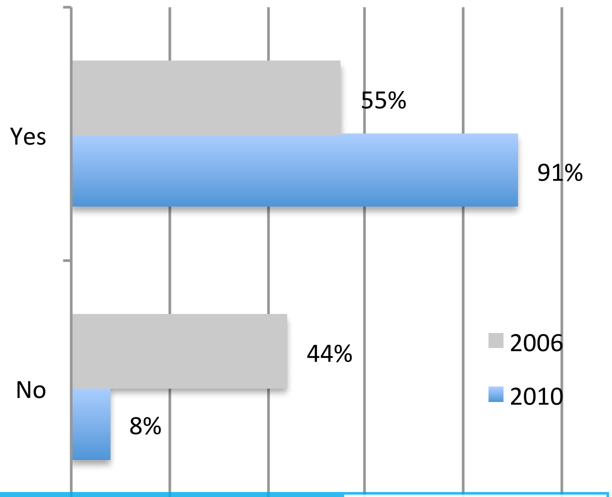
A small percentage of respondents stated they listen to radio at *sede de suku* (3%) and at work (2%).



GRAPH 34. VENUES FOR LISTENING
N=1751 (radio listeners)

Where do you usually to listen to the radio? [s]

RTL programmes



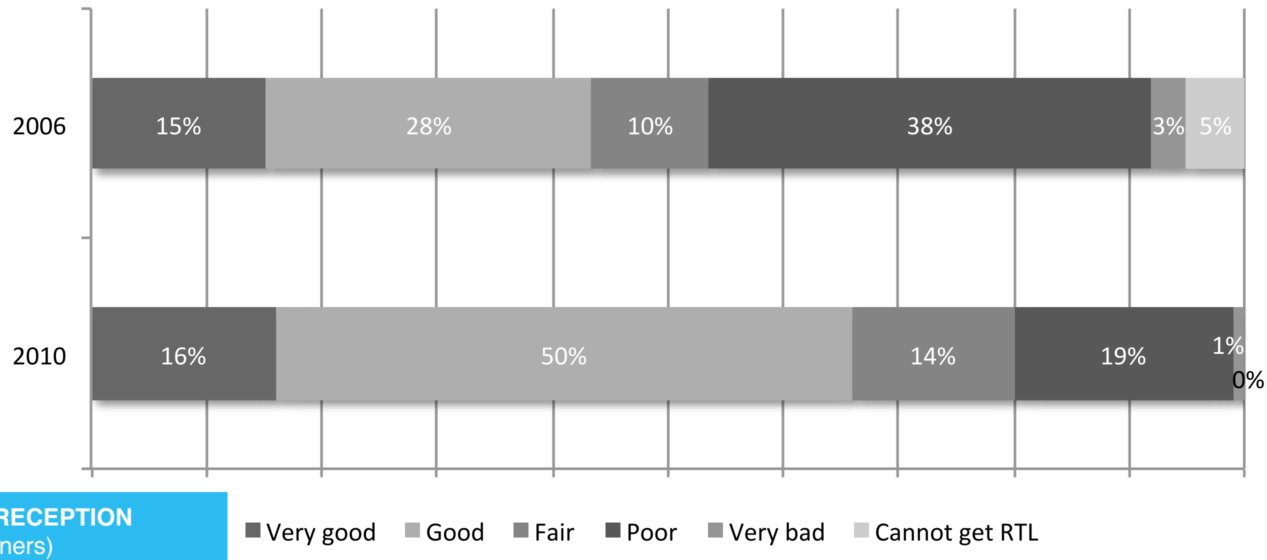
GRAPH 35. RTL LISTENERS
N=1751 (radio listeners)

Have you ever listened to RTL? [s]

The survey asked all radio listeners whether they had ever listened to the national radio broadcaster, RTL – Radio Timor-Leste.

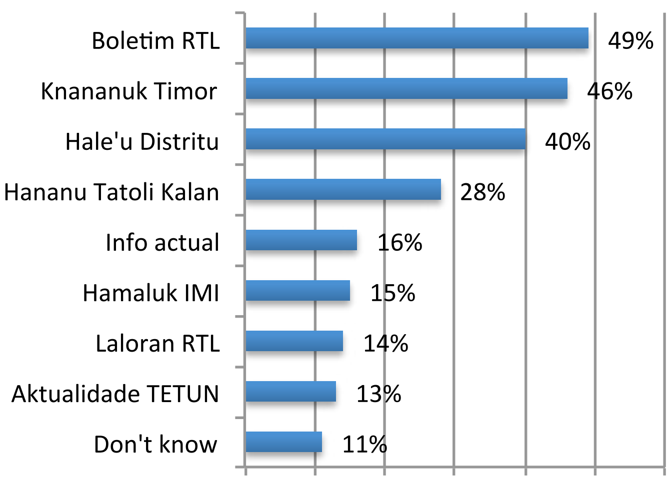
Graph 35, on the left, shows that the percentage of people who listen to RTL increased by two thirds, from 55% in 2006 to 91% of listeners today. This high total reach is found in all demographic groups and districts except for Lautem District where only 56% of radio listeners have listened to RTL.

We asked RTL listeners about the reception of RTL when they listen to it. Results show there is a significant increase in the percentage of respondents who graded reception positively between 2006 and 2010 (**Graph 36**, below).



GRAPH 36. RTL RECEPTION
N=1593 (RTL listeners)

What is the reception of RTL? [s]



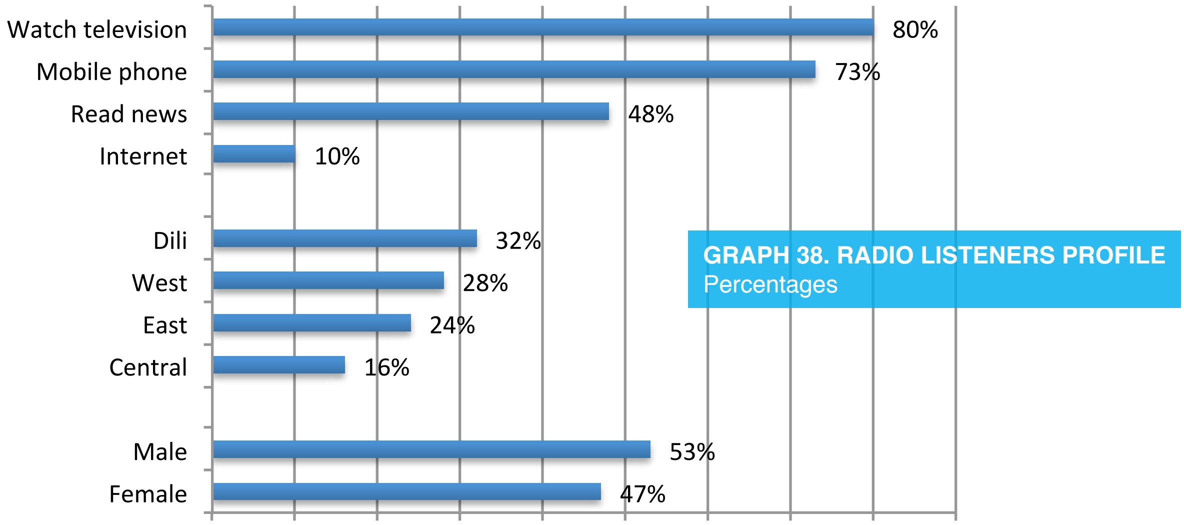
GRAPH 37. RTL MOST LISTENED PROGRAMMES
N=1593 (RTL listeners)

What RTL programmes have you listened to in the last four weeks? [s]

Now, only 20% of RTL listeners stated that reception is bad or very bad; only half of the 42% who stated this in the 2006 survey. Seven out of 10 listeners today stated the reception of RTL in their locations is either good or very good.

We asked only RTL listeners what RTL programmes they have listened to over the past four weeks (**Graph 37**, left). Data suggest that the three most listened to programmes are: *Boletim RTL* (49%), a news programme; *Knananuk Timor* (46%), a Timorese music programme; and *Haleu Distrito* (40% – up from 9% in 2006), a news and features programme about the districts.

Radio listeners profile



Another common analysis in media surveys is to create a profile of media users. Profiles explain who the users are, what habits they have in relation to consumption of other media, where they are residing, their age, gender and other characteristics. This is different from crosstabs analysis (such as in **Graph 38**, above), which show percentages of demographic sub groups who reply to a certain question. Profiles, on the other hand, combine demographic responses from different questions to give a broader picture.

In this case our analysis shows that 80% of radio listeners also watch television; 73% of them live in a household with a mobile phone; half (48%) of them also read newspapers and one in 10 have (or someone in their household has) access to the internet.

One in three listeners (32%) live in Dili – a significant concentration, as the total population of Dili is 22% of the country's total; and male listeners are 53%, against 47% female, which indicates no significant gender gap.

Key conclusions on radio use

- Since 2006, radio has had increases in daily, weekly, monthly and total reach; it still has the highest reach of any single medium (weekly reach = 55%).
- News and current affairs are still the most listened to programmes on radio; demand for music has increased.
- Morning and early evening peak listening hours have not changed since 2006.
- The national broadcaster RTL is still the most recognised channel; and RTL's new AM and FM services have high individual recognition rates. Private and community radio stations also have significant recognition and listening rates.
- Since 2006, the number of radio listeners who report having ever listened to RTL has increased by two thirds; listeners also report better reception quality.

Focus groups findings on radio

- *Radio, especially community radio stations, fill the gap for the need for local/district news.*
- *Participants believe more and more people are now watching television instead of listening to radio to get information/news.*

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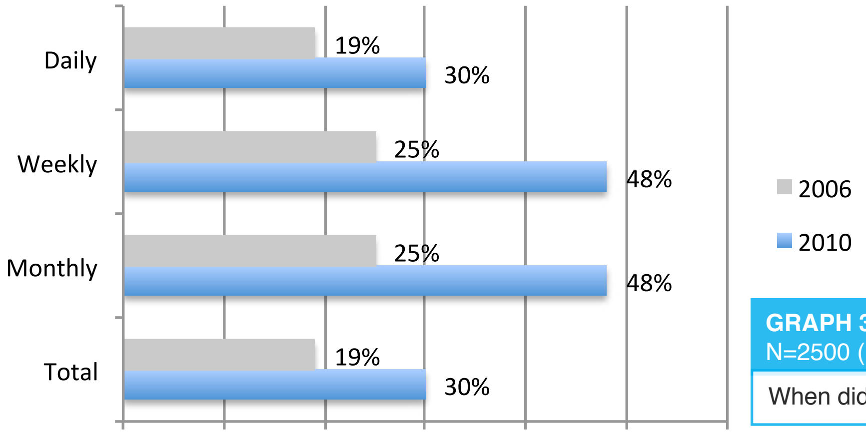
TELEVISION



GRAPH 39. TELEVISION REACH
N=2500 (N=1272 in 2006)

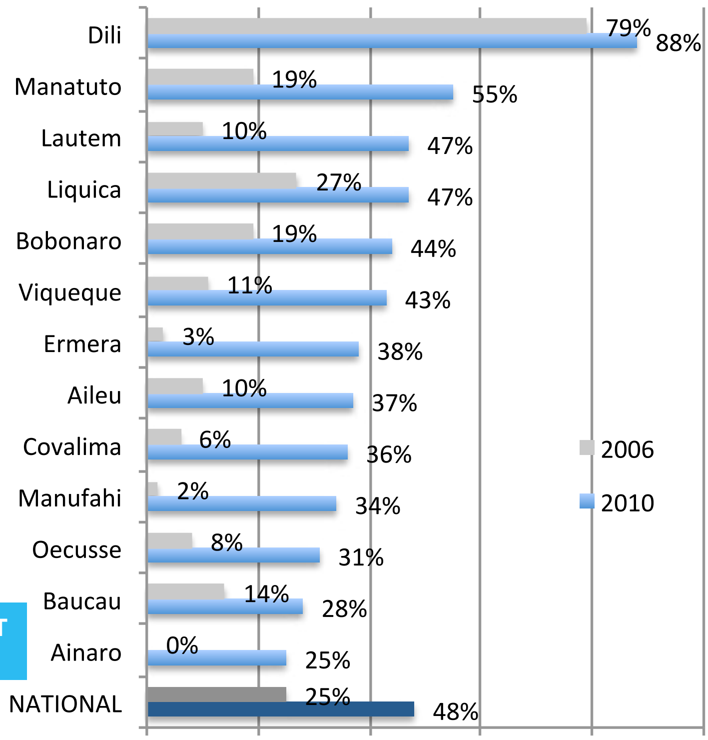
When did you last watch television? [s]

Television reach

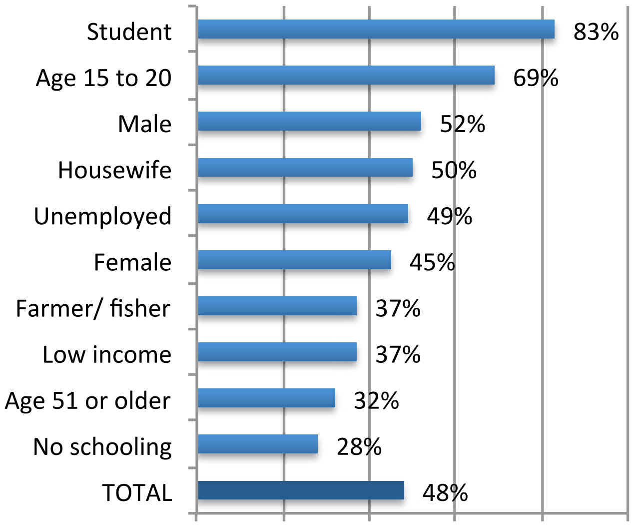
The survey measured the reach of television in Timor-Leste today. **Graph 39**, above, shows the results in comparison to the 2006 survey.

Television reach has grown significantly. Daily reach is now 30% of the adult population – up from 19% three years ago. Weekly reach has doubled to half the population (48%) and monthly reach is 58%. Total reach is now 64%, up from 40% in 2006.

Weekly reach in Dili has increased from 79% in 2006 to 88% today. In all other districts the growth in reach was far larger (**Graph 40**, right). Manatuto: from 19% to 55%; Lautem: from 10% to 47%; Liquica: from 27% to 47%. Ermera has increased from only 3% in 2006 to 38% today. Ainaro, according to the previous survey, was not reached by television in 2006, but now has a television weekly reach of 25%.



GRAPH 40. TELEVISION REACH PER DISTRICT
N=2500 (N=1272 in 2006)



GRAPH 41. TELEVISION REACH ACROSS DEMOGRAPHIC GROUPS
Percentages

Although most of television viewers still reside in Dili, the findings suggest that the increase in total reach can be attributed mostly to increases in the districts.

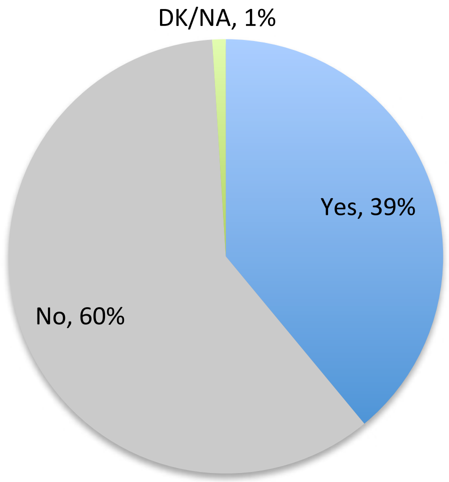
Further analyses, as shown in **Graph 41,** on the left, found that the television weekly reach varies among different demographic groups.

Within a week, television reaches 83% of students; 69% of 15- to 20-year-olds; but only 28% of those 51 or older. Weekly reach among men is slightly higher compared to women (52% against 45%) although weekly reach among housewives is 50%.

Weekly reach among unemployed people is 49% and among farmers and fishers, the largest occupational group, is 37%. Among lower income respondents weekly reach is 37%, and among those with no schooling, 28%.

GRAPH 42. TELEVISION OWNERSHIP
N=1603 (television viewers)

Do you have a television at home? [s]



Television ownership and places of viewing

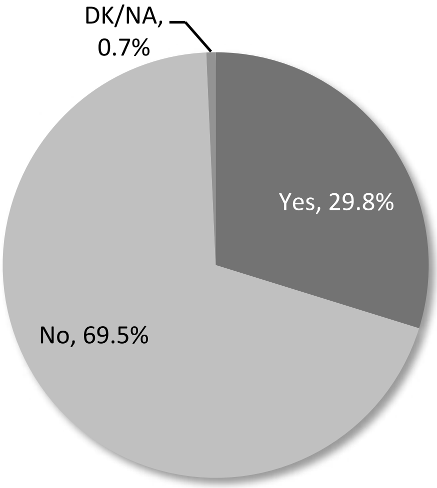
We asked viewers whether they have a television in working order at home (**Graph 42**, left); 39% of viewers (25% of the population) replied 'yes'. This is consistent with the previous question asked in the demographic section of this report (see **Graph 8**, page 22). In 2006, 19% of the respondents had a television set at home.

Television ownership varies across districts and demographics. In Dili, 79% of viewers have a television at home. Ermera and Oecusse had the lowest figures, with only 13% of viewers having a television at home.

The higher the respondents' education and income, the higher the probability of having a television at home.

GRAPH 43. SATELLITE DISHES
N=627 (television owners)

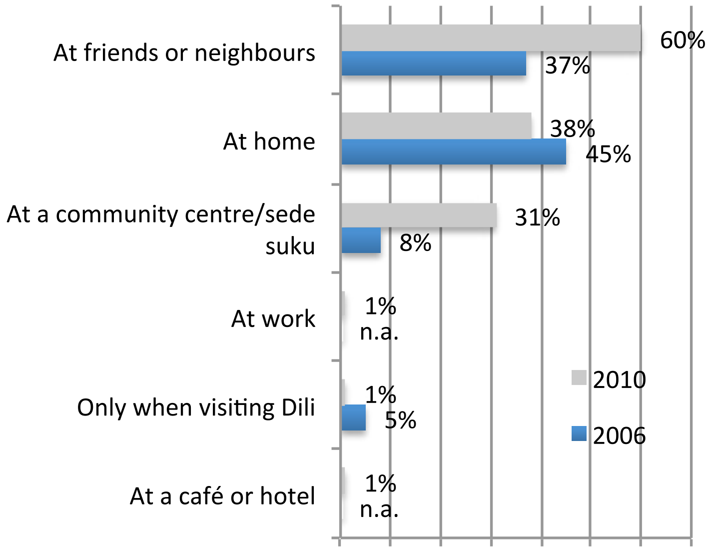
Do you have a satellite dish connected to your television? [s]



We asked whether television owners have a satellite dish connected to the television. As shown on **Graph 43**, left, 30% of television owners have a satellite dish. This is consistent with the findings in the demographic section (**Graph 8**, page 22), which shows that 7.5% of the total population have a satellite dish connected to their television. The percentage of people who owned a satellite dish in the 2006 survey was 7.6%.

The next question asked television viewers where they watch television: **Graph 44**, right, shows the results compared to the 2006 findings. 60% of viewers watch television at 'a friend's' or 'neighbours' houses'. 38% also watch at their own home – consistent with the 39% of viewers who stated they own a television in the previous question.

The percentage of viewers who said they watch television at *sede de suku* (*suku* office) has quadrupled from 8% in 2006 to 31% today. This is consistent with the recent Government policy of equipping *suku* offices with television sets, DVD players and solar panels.

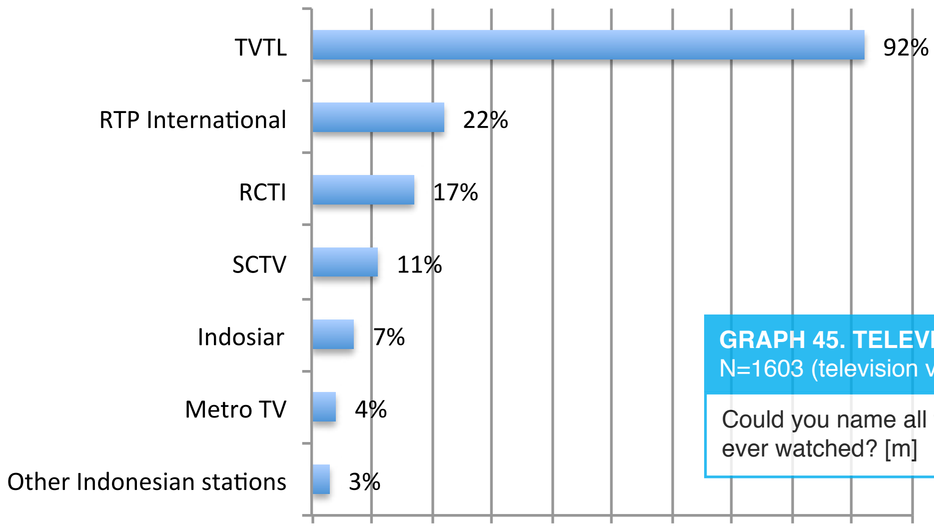


GRAPH 44. PLACES OF VIEWING TELEVISION
N=1603 (N=485 in 2006) (television viewers)

Where do you usually watch television? [s]

Stations watched

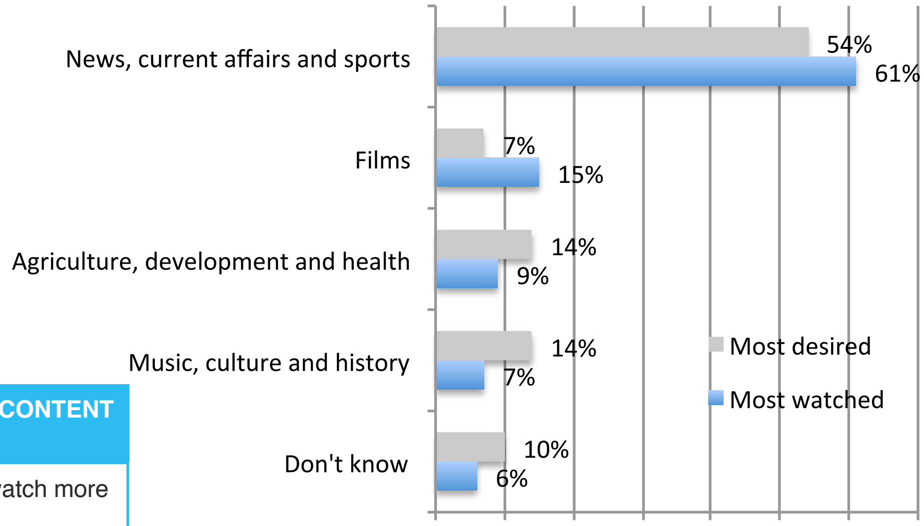
We asked television viewers to name all channels they have ever watched. As show in **Graph 45**, below, nine in 10 viewers (92%) stated they have watched TVTL. 22% said RTP International, a Portuguese satellite channel available several hours a day through TVTL's terrestrial transmissions. After that, several Indonesian channels, only available through satellite receivers, were mentioned. Crosstabs show that the percentage of viewers who watch Indonesian channels is higher in Dili and the central districts. Television owners with satellite dishes mentioned Indonesian channels more often than those without (RCTI 28%; SCTV 19%; Metro 9%).



GRAPH 45. TELEVISION STATIONS WATCHED
N=1603 (television viewers)

Could you name all television channels that you ever watched? [m]

Programme preference and opinions on TVTL



GRAPH 46. MOST WATCHED OR MOST DESIRED CONTENT
N=1603 (N=485 in 2006) (television viewers)

Most watched: What television programmes do you watch more often? [open]
Most desired: What programmes do you desire the most? [open]

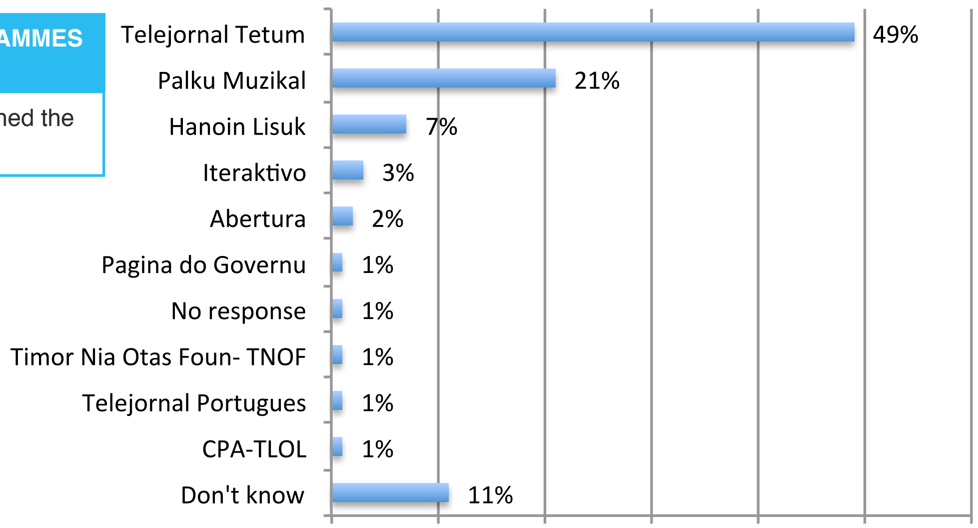
We asked two open-ended questions to respondents who watch television: first, what kinds of programme they most often watch; and second, what kinds of programme they desired the most to watch. The results are shown in **Graph 46**, above.

61% of television viewers stated they most often watch national news, current affairs and sports. 54% stated these are also the most desired programmes. 15% stated they most often watch films and movies, but only 7% said this was their most desired programmes. 9% stated they most often watch agriculture, development and health programmes, but 14% said this was their desired choice. 7% of viewers stated they most often watch music, cultural and history programmes, while 10% stated that these are their most desired programmes.

We asked television viewers which TVTL programmes they have most viewed during the past four weeks. **Graph 47**, below, shows that 49% (half of the viewers) stated they watch *Telejornal Tetum* (Tetum news) – down from 62% in 2006. This is followed by 21% who said they most watched *Palku Muzikal* (Musical Stage) – up from 8% in 2006; while 7% now most watch *Hanoin Lisuk* ('Thinking Together', a current affairs show) – almost the same as 6% in 2006.

GRAPH 47. MOST WATCHED PROGRAMMES
N=1603 (TVTL viewers)

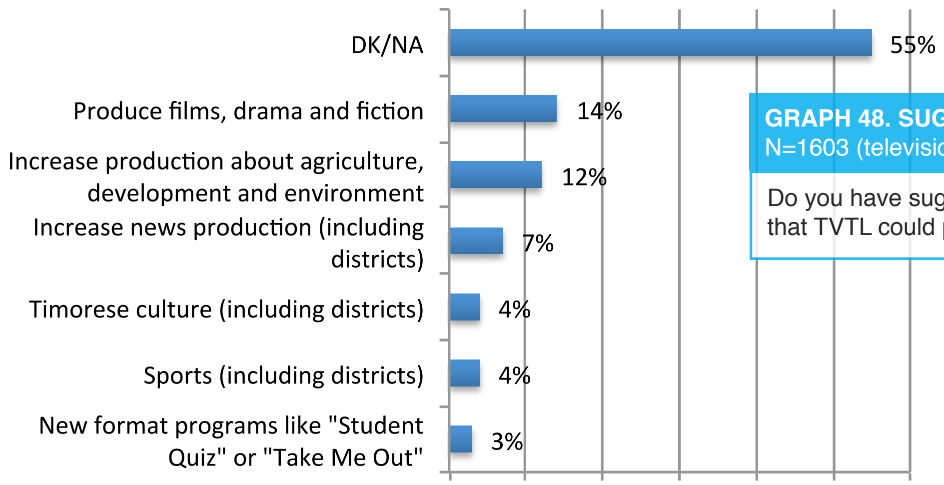
What TVTL programmes have you watched the most over the last four weeks? [m]



Findings vary among demographic groups. The percentage of viewers who stated *Telejornal Tetum* as the most watched programme is higher in western districts (63%) and lower in Dili (43%). *Palku Muzikal* is more popular among female viewers (26% stated they watch *Palku Muzikal*) and younger viewers (35% among 15- to 20-year-olds).

The last question on TVTL programmes was open-ended, asking respondents for suggestions for TVTL programmes.

As shown on **Graph 48**, below, 55% (half of viewers) stated they don't know/don't have any suggestions for TVTL. 14% of viewers suggested that TVTL should produce films, drama and fiction programmes, and 12% suggested increasing programmes about agriculture, development and the environment. 7% suggested increasing news, including from the districts, and 4% suggested programmes about Timorese culture, including from the districts.



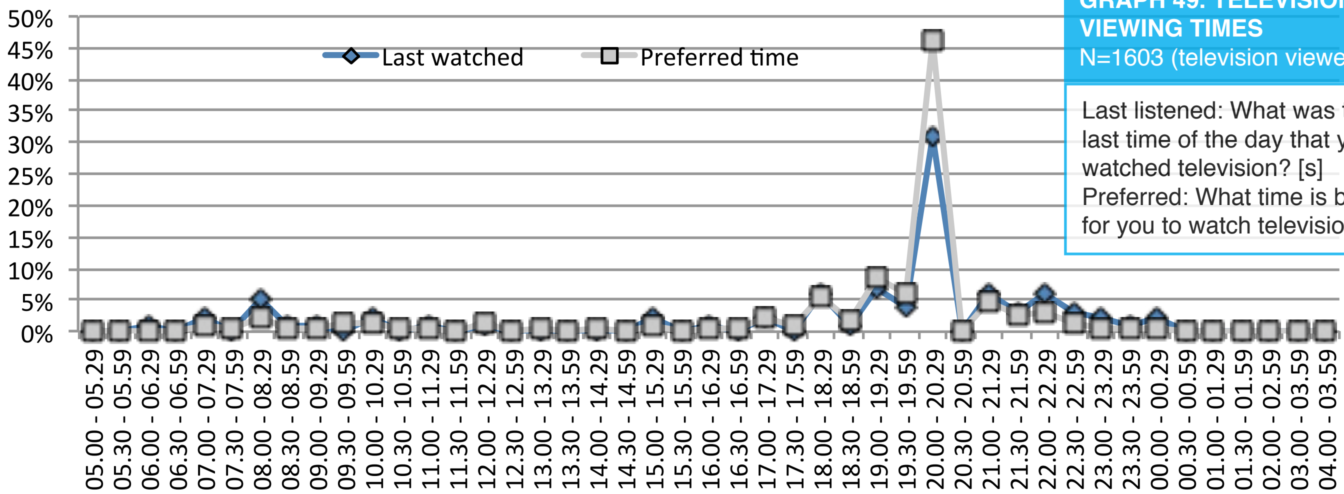
GRAPH 48. SUGGESTIONS TO TVTL
N=1603 (television viewers)

Do you have suggestions of programmes that TVTL could produce? [open]

Television viewing time

The survey asked television viewers when they had last watched television, and what is the best time for them to do so.

As **Graph 49,** below, shows, there is only one peak time, when percentages of actual watching (about 32%) and preferred time (about 46%) are high. That time is 20:00-20:30. There is a very small spike between 08:00-08:30 in the morning. These results are consistent with the findings from the 2006 survey as well, indicating that there has been no change in the prime time for television audiences.



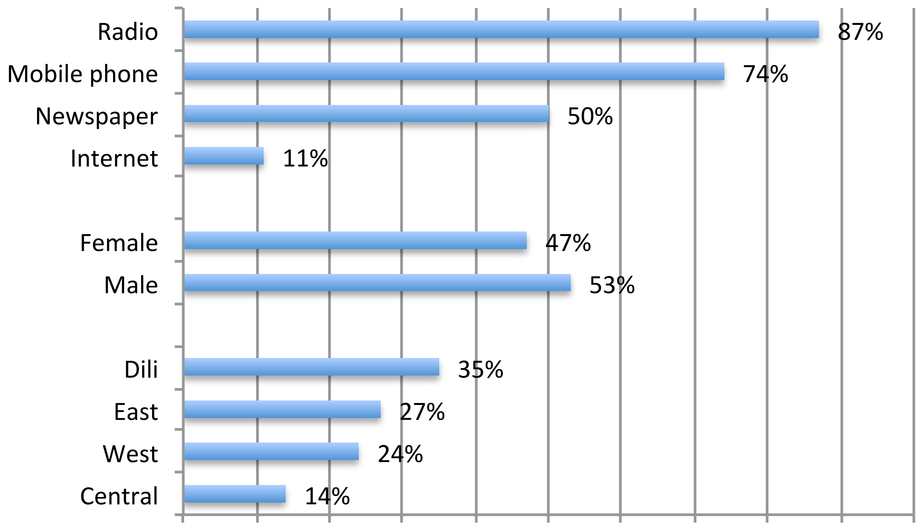
GRAPH 49. TELEVISION VIEWING TIMES
N=1603 (television viewers)

Last listened: What was the last time of the day that you watched television? [s]
Preferred: What time is best for you to watch television? [s]

Television viewers profile

Graph 50, below, shows that 87% of television viewers listen to the radio. 74% of them own a mobile phone or live in a household with a mobile phone; half of television viewers also read newspapers or magazines; and 11% of them have access or live in a household with access to the internet.

53% are male and 47% are female. One in three (35%) of television viewers lives in Dili. This indicates that television audiences are not evenly distributed over the territory, as the population of Dili is 22% of the total of the country.

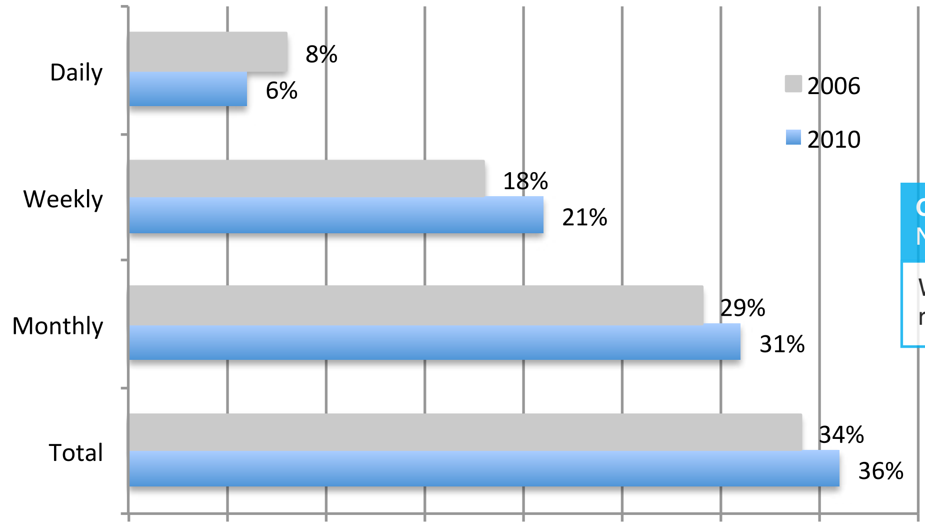


GRAPH 50. TELEVISION VIEWERS PROFILE
Percentages

Key conclusions on television viewing

- Since 2006, there has been a large increase in daily, weekly, monthly and total reach of television. Weekly reach has almost doubled (to 48%) and is just behind that of radio.
- The highest increases occurred in the districts.
- TVTL is by far the most watched channel; and around one third of viewers report watching television at the local *suku* office. This corresponds to around one in five people.
- The most watched programme is *Telejornal Tetum*. Peak viewing hours mirror the 2006 survey with a sharp spike at the time *Telejornal Tetum* is broadcast.
- Indonesian television channels have significant recognition rates, especially among satellite dish owners.

NEWSPAPERS



GRAPH 51. NEWSPAPERS REACH
N=2500 (N=1272 in 2006)

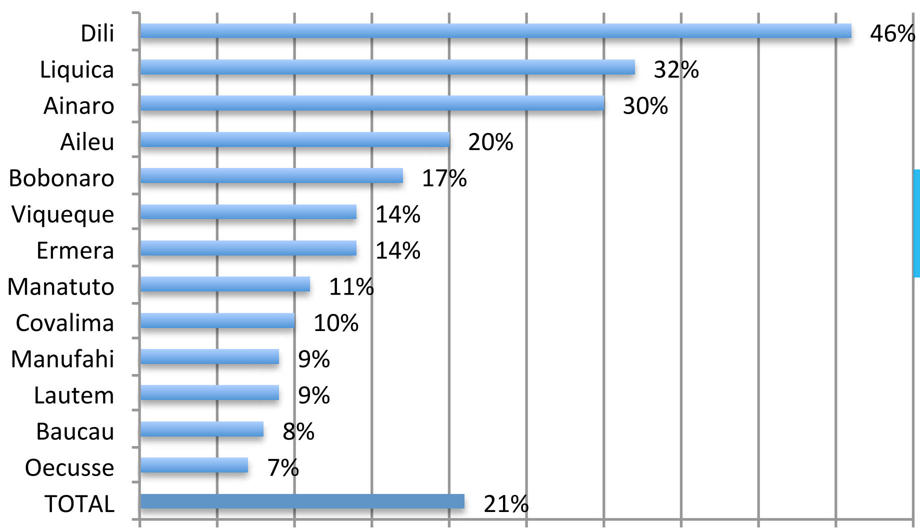
When was the last time that you read a newspaper or magazine? [s]

Newspaper reach

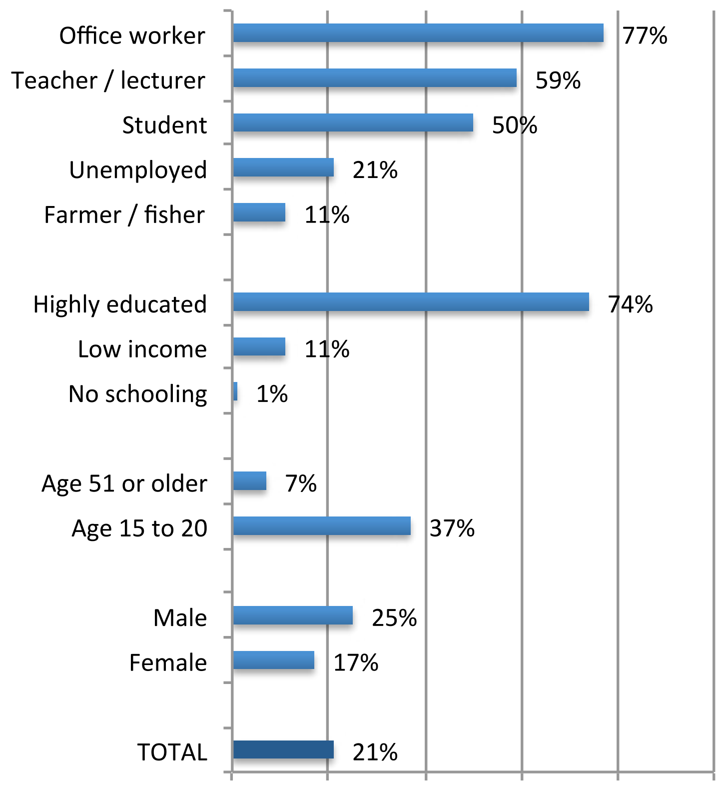
Similar to radio and television, the survey measured the reach of newspapers and other print media in Timor-Leste.

We found that the percentage of the adult population who had read a newspaper or a magazine at any point of time is 36% – an increase of 34% from 2006, shown in **Graph 51**, above. Data for monthly, weekly and daily reach indicates that there is no major change in newspaper reach.

We analysed further to look for regional or demographic variations on current reach of newspapers. First, we look at the weekly reach variations among districts. As shown on **Graph 52**, below, only three districts – Dili (46%), Liquica (32%) and Ainaro (30%) – have weekly reach above the total national average of 21%.



GRAPH 52. NEWSPAPER READERS BY DISTRICT
N=2500



GRAPH 53. READERS ACROSS DEMOGRAPHIC GROUPS
Percentages

Aileu (20%), Bobonaro (14%), Viqueque and Ermera (each 14%) take the middle ground of newspaper reach. Manatuto (11%), Covalima (10%), Manufahi (9%), Lautem (9%), Baucau (8%) and Oecusse (7%) all lag at around half the national average.

We also looked at newspaper and magazine weekly reach among demographic groups.

As **Graph 53** on the left shows, newspaper and magazine weekly reach is 77% among office workers and 59% among teachers and lecturers. We found that 50% of students read newspapers at least once a week, as do 21% of the unemployed, and 11% of farmers.

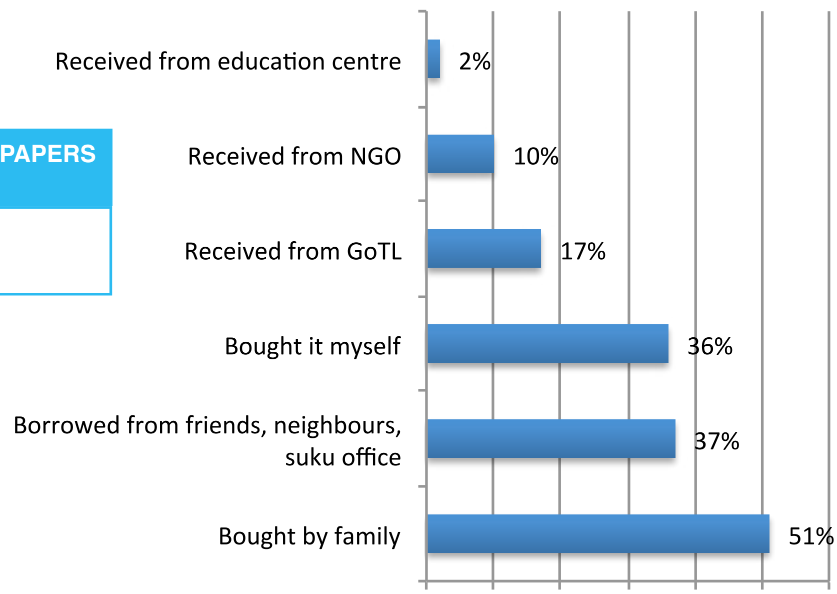
As expected, the weekly reach of newspapers and magazines among the highly educated is great at 74%, but low (11%) among low-income respondents, and very low among those with no schooling (1%, which is within the survey margin of error).

Reach among the younger 15- to 20-years-old group is 37%, significantly higher than among those aged 51 years or older, where weekly reach is 7%. Reach among males is 25%, against 17% among females.

We asked how readers obtain the newspaper or magazine that they read, as shown in **Graph 54**, below. 51% stated they got it from family members, 37% said they borrow it and 36% said they bought the papers themselves. 17% stated they received papers distributed by Government and 10% said received from NGOs; while 2% said they received them from education centres.

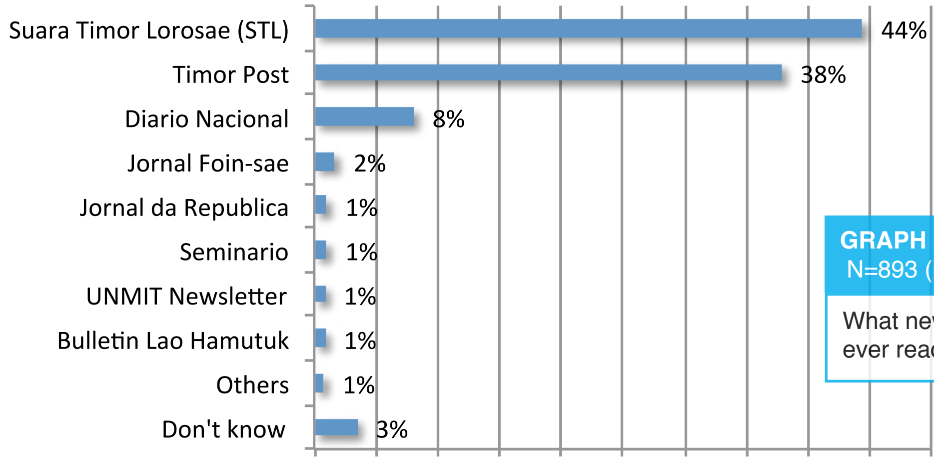
GRAPH 54. WAYS OF OBTAINING NEWSPAPERS
N=893 (newspapers readers)

How did you receive the last newspaper or magazine that you have read? [m]



Newspapers and magazines read

We asked what were the newspapers or magazines that respondents have read. Results are shown on **Graph 55** below. This type of question ideally should allow for multiple answers, but in this survey it was asked as a single-answer question. Please refer to the technical report for information on this change. Therefore, this data suggests the most favoured newspaper.



GRAPH 55. PRINT MEDIA EVER READ
N=893 (readers)

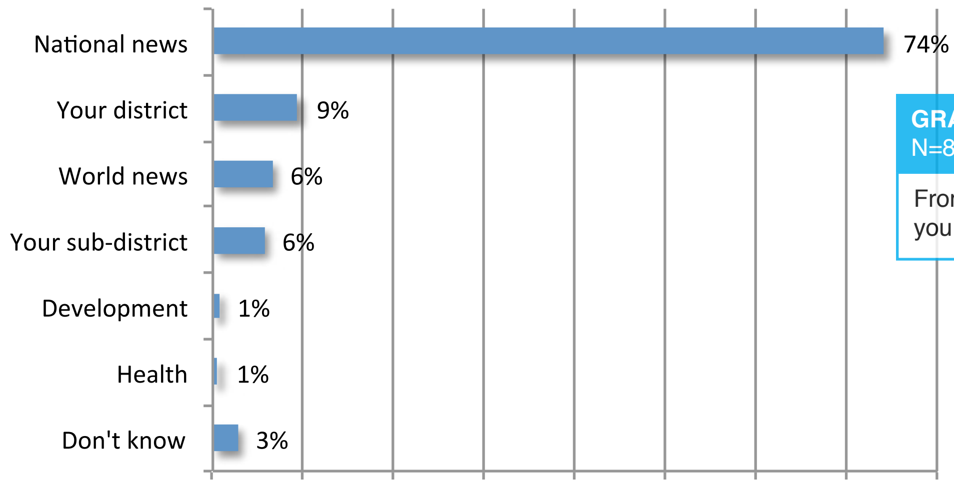
What newspaper or magazine have you ever read? [m]

Contents preference

The survey asked newspaper and magazine readers, from what they have read, what is the content most interesting for them?

As shown on **Graph 56**, below, 74% are most interested in national news.

9% stated they are most interested in reading about their district; 6% about world news and 6% about their sub-district. We found that 1% of readers are most interested in reading about development and health news.

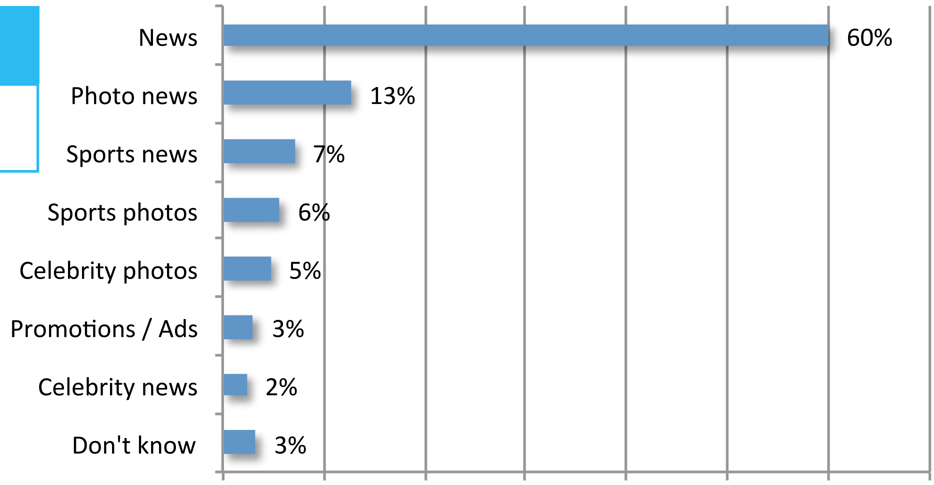


GRAPH 56. PREFERRED TOPICS
N=893 (readers)

From the topics below, what are you most interested in reading? [s]

GRAPH 57. PREFERRED CONTENT
N=893 (readers)

From the features below, what do you prefer to see in a print publication? [s]



The survey asked readers what they prefer to see as content in a print publication. Results are shown above in **Graph 57**.

60% of readers preferred to see news as text. 13% preferred photo news. 7% asked for sports texts and 6% asked for sports photos. 5% of readers preferred celebrity photos and 2% preferred celebrity texts.

Focus groups findings on barriers to readership

From the focus groups, it is clear that distribution remains a problem outside of Dili. Some participants said they were interested in reading newspapers and magazines but complained about the difficulty obtaining a newspaper and magazine that are up to date. Some experienced delays in distribution of up to two weeks.

Many readers criticised the ability of journalists to present factual and relevant information. Typos, mistakes in naming sources or areas and some other inaccuracies were said to be occurring regularly. Some potential readers were disappointed and considered the media as unable to report news from remote areas and said that journalists put too much emphasis on events occurring in Dili and other town centres.

Barriers to reading

The survey did not attempt to identify the barriers that keep people from reading newspapers and magazines. The focus group discussions, however, did just that. From these discussions, we identified four main reasons behind low readership:

1. Cost
2. Illiteracy
3. Distribution
4. Quality

Newspapers and magazines in Timor-Leste cost about one US dollar, which is considered expensive in a country where half the population earns less than $10 per month. Other participants in the focus groups stated that not many of them and their family members read at all, so they never read newspapers.

Newspaper readers profile

As shown in **Graph 58**, on the right, almost nine out of 10 readers also listen to radio, watch television and own a mobile phone, or live in a home with one.

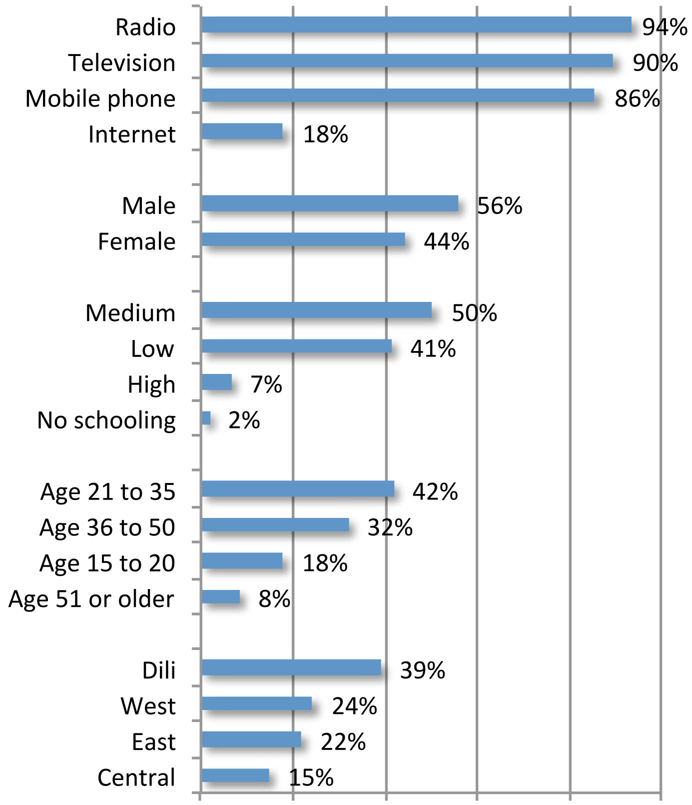
Male readers are 56%, while females are 44%.

Crosstabs show that newspapers are far from exclusively read by highly educated people: half of the readers have a medium (partial or completed secondary) education; and 41% have a low education (some schooling – completed primary). Only 7% are highly educated, and 2% of readers had no schooling at all.

42% of readers are aged 21 to 35 years, while 32% are 36- to 50-years-old. 18% are aged 15 to 20 years, and only 8% are 51 years or older.

40% of readers reside in the Dili area, 24% in the western districts and 22% in the eastern districts. The crosstabs show 15% of readers are in the central districts.

GRAPH 58. READERS PROFILE
Percentages



Key conclusions on newspaper and magazine readership

- The total reach of newspapers and magazines has slightly increased since 2006 (weekly reach now at 21%). There are, however, significant regional variations in reach: Dili dominates with 46%, and Oecusse lags with 7%.
- The majority of readers are of low or medium education; newspapers are also read by a large percentage of the highly educated.
- Barriers to higher readership include cost and literacy.

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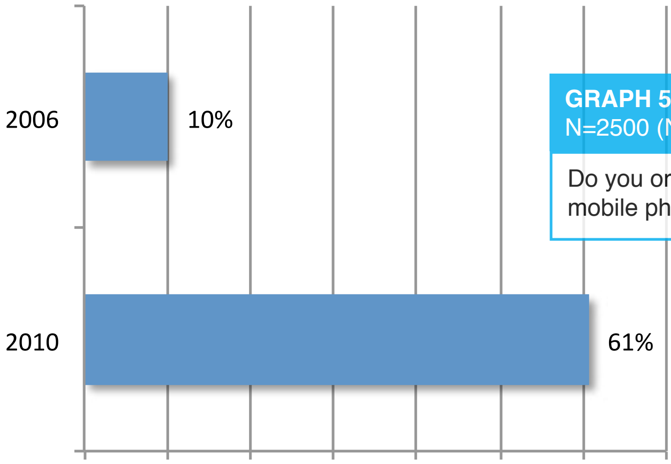
MOBILE PHONES



GRAPH 59. HOUSEHOLDS WITH MOBILE PHONES
N=2500 (N=1272 in 2006)

Do you or any of your household members own a mobile phone? [s]

Ownership and coverage

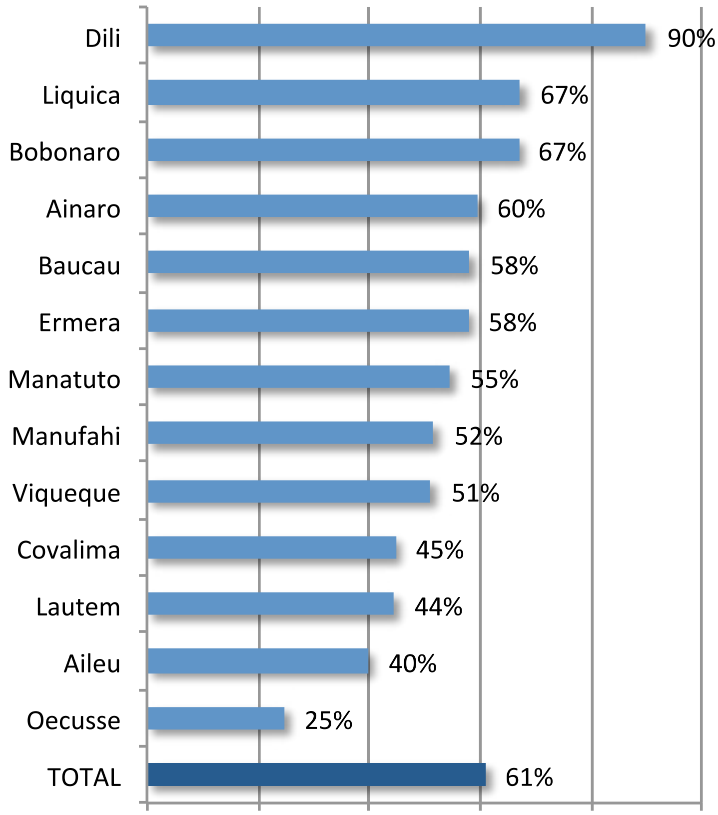
The 2006 Hirondelle Survey established baseline data for mobile telephone ownership in Timor-Leste. The 2010 survey studied ownership, use, services and coverage of mobile telephony.

As shown in **Graph 59**, above, mobile phones are the fastest growing communication tool in Timor-Leste, with a 600% increase in ownership since 2006.

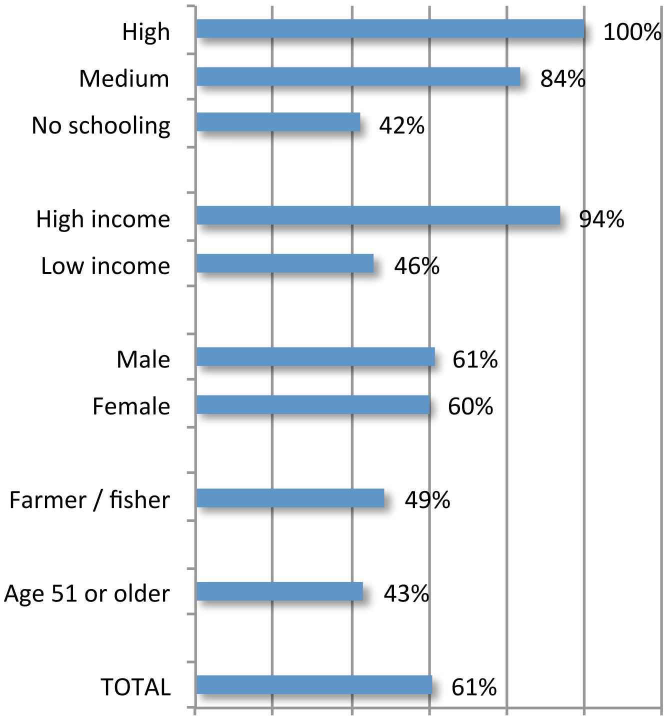
Graph 60, on the right, shows the percentage of households with mobile phone in the districts. As with other media, Dili has the highest percentage; 90% of households in Dili have at least one mobile phone.

Liquica and Bobonaro are above the national average. 67% of households there have mobile phone access. Ainaro, Baucau, Ermera are about average (58 to 60%) and penetration in Manatuto, Manufahi and Viqueque is one in two households.

Covalima and Lautem rates are 45% and 44% respectively. The lowest reach is found in Oecusse, where only 25% of households have mobile phones.



GRAPH 60. MOBILE PHONE ACCESS BY DISTRICT
N=2500



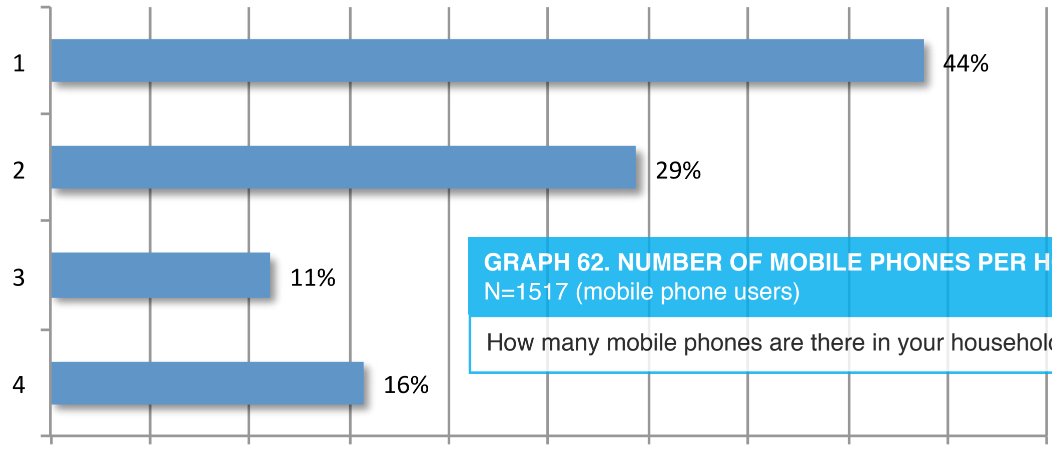
GRAPH 61. MOBILE PHONE ACCESS ACROSS DEMOGRAPHIC GROUPS
Percentages

Data show variations of mobile phone ownership across different demographic groups – see **Graph 61**, on the left. All highly educated respondents have someone in their household who owns a mobile phone. The figure is only 42% among those with no schooling.

Almost one in two (46%) low-income households have access to a mobile phone. There is no variation between male and female.

Half of farmers and fishers own mobile phones and 43% of those aged 51 years or older have access to mobile phones.

The survey asked respondents how many mobile phones exist per household. As shown in **Graph 62**, below, 44% said they only have one device in their household.



GRAPH 62. NUMBER OF MOBILE PHONES PER HOUSEHOLD
N=1517 (mobile phone users)

How many mobile phones are there in your household? [open]

29% of respondents said they have two mobile phones in the house. 11% stated they have three and 16% stated they have four mobile phones in their house. This brings the national average of mobile phones' ownership to 1.9 per household. The 2010 Census preliminary data[12] states that Timor-Leste has around 183,000 households. As this survey finds that 61% of these households have mobile phones, this suggests an estimated total of about 212,000 people live in households with access to a mobile phone.

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[12] *TIMOR-LESTE (2010),* Population and Housing Census 2010 – Preliminary Results. *October 2010. Pg. 5*

Use habits

The survey asked respondents how much they or the household members using a mobile phone usually spend in a week.

Graph 63, on the right, shows that one in three stated they spend one dollar or less. Half (51%) spend between $2 and $5 every week.

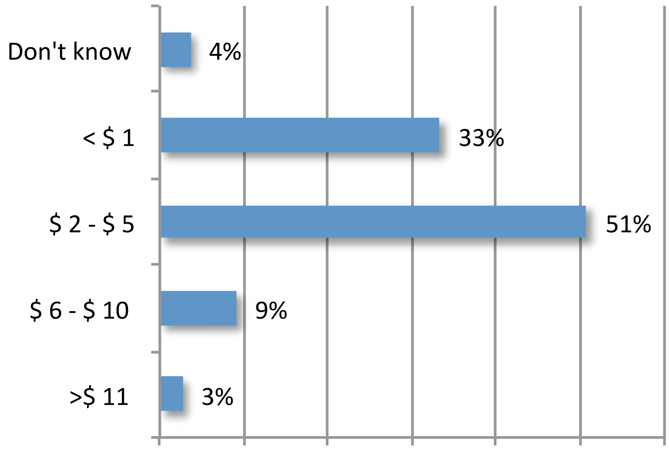
9% stated they spend between $6 and $10, and 3% stated they spend $11 or more.

The next question asked respondents what was the last time they made a call. The results are shown in **Graph 64**, on the right. 18% said it was some hours before the interview. 39% stated they did it the day before the interview. This means 57% of mobile phone users are frequent or daily users. 30% said they called within the past week.

We asked what people call about. **Graph 65**, below, shows that 96% call for family related issues. 39% call for work or job-related issues.

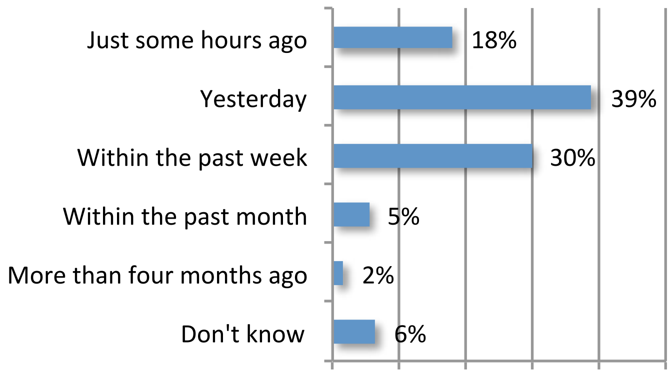
GRAPH 63. AVERAGE EXPENDITURE ON MOBILE PHONE CREDITS PER WEEK
N=1517 (mobile phone users)

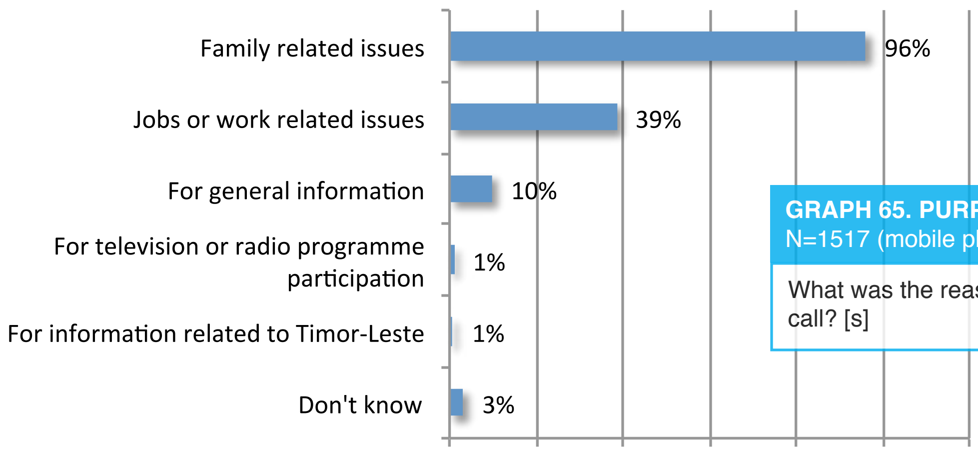
On average, how much do you usually spend in mobile phone credits (‘*pulsa*’) per week? [s]



GRAPH 64. TIME OF LAST CALL
N=1517 (mobile phone users)

When did you last make a call? [s]

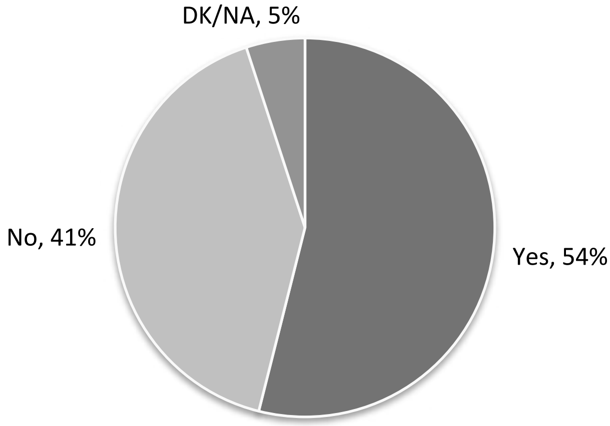




GRAPH 65. PURPOSE OF CALL
N=1517 (mobile phone users)

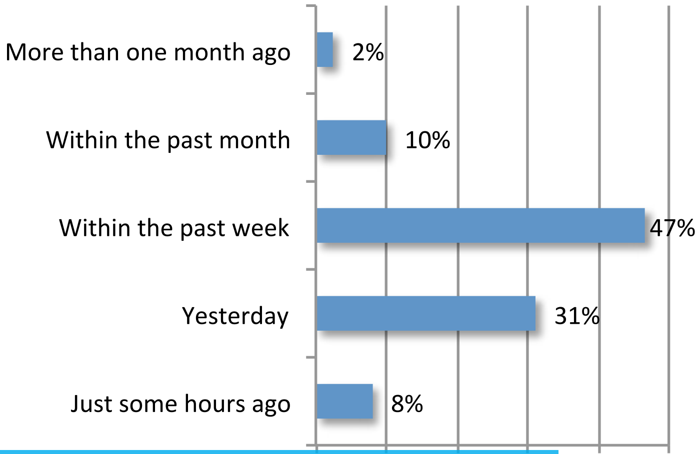
What was the reason of your last call? [s]

Text message use



GRAPH 66. USE OF TEXT MESSAGES
N=1517 (mobile phone users)

Do you use text messages? [s]



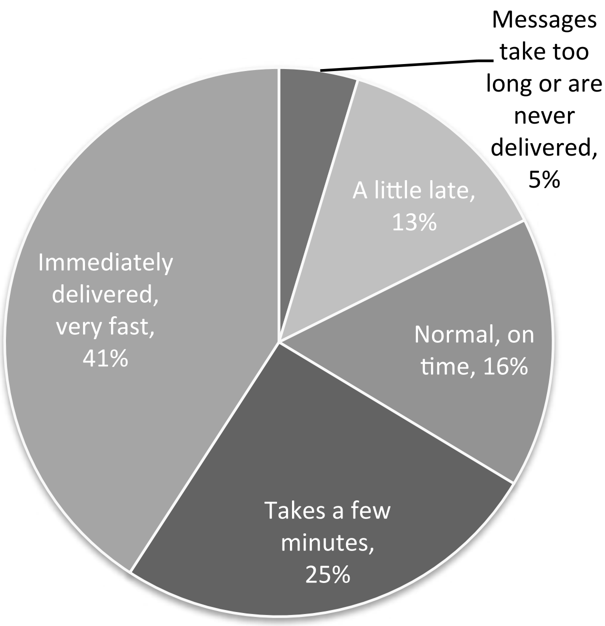
GRAPH 67. TIME OF LAST TEXT MESSAGE
N=1517 (mobile phone users)

When did you last send a text message? [s]

Graph 66, above left, shows that 54% of respondents with a mobile phone in their household stated they use text messages (or SMS, short message service) to send or receive information. 5% replied they don't know. These are probably respondents who don't own or use a mobile phone themselves but have someone in the family who uses it.

Crosstabs show that even 20% of illiterate respondents replied 'yes'. This may seem a bit odd, but possible explanations for this are: they might ask somebody who can read and write to send a text message on their behalf; or they mean somebody in their household who owns the phone and sends the text message, not themselves.

The survey asked what time a text message was last sent. As can be seen in **Graph 67**, above right, 8% stated that it was just some hours before the interview; 31% stated yesterday and 47% stated within the past week.



GRAPH 68. PERCEPTION OF TEXT MESSAGE DELIVERY
N=1517 (mobile phone users)

How quick is the delivery of your text messages? [s]

The survey probed perceptions of the speed of text message services. As shown in **Graph 68**, on the left, 41% stated that messages are immediately delivered.

One in four (25%) stated it usually takes a few minutes to be delivered. 16% said it is delivered 'on time'.

18% of respondents provided negative feedback: 13% stated messages are usually delivered a little late and 5% stated messages take too long or are never delivered. This result varied among districts. 34% of users in Lautem provided negatived responses; 26% in Baucau, and 66% in Viqueque. This is may be related to telecommunication infrastructure, which is changing rapidly.

The survey found that 69% of respondents with access to mobile phones claim to have used the service that sends and receives credits or '*pulsa*' through text messages.

Text message campaigns and information messages

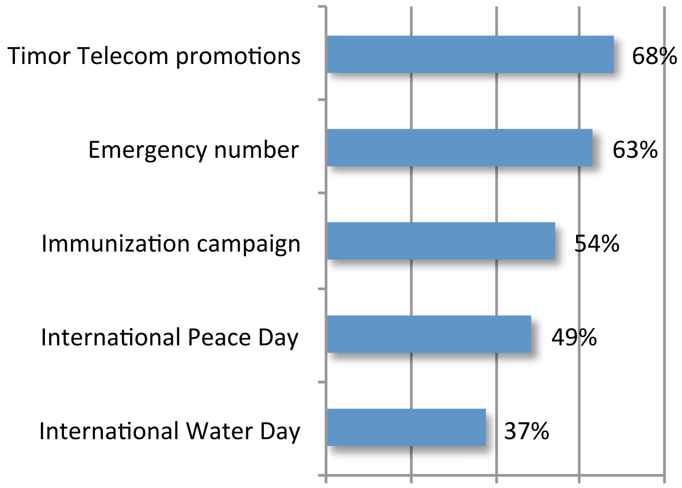
One of the objectives of this survey was to measure the effectiveness of some media campaigns run by UNMIT and the Government of Timor-Leste.

Four particular campaigns used text messages, sent to all mobile phone users. The survey probed for recognition of these campaigns, plus the reception of promotional messages from Timor Telecom.

As shown in **Graph 69**, on the right, 68% remembered receiving promotional messages from Timor Telecom. 63% stated they received the message about the emergency number; 54% said they received information about immunization campaigns; half (49%) said they received a message about celebrations of International Peace Day. The lowest percentage (37%) was on International Water Day commemoration. Note that some respondents might have actually received the message but did not remember.

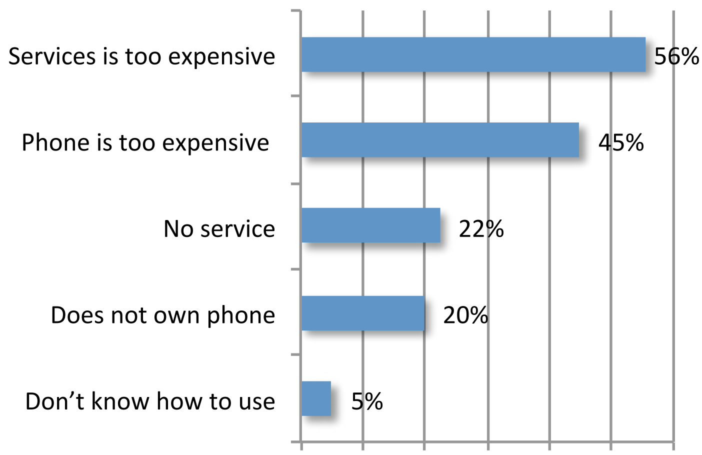
GRAPH 69. TEXT MESSAGE CAMPAIGN RECOGNITION
N=1517 (mobile phone users)

Do you remember receiving text messages about the topics below? [m]



GRAPH 70. MOBILE PHONE BARRIERS
N=1517 (mobile phone users)

What are the main reasons that stop you from using more mobile phones? [m]

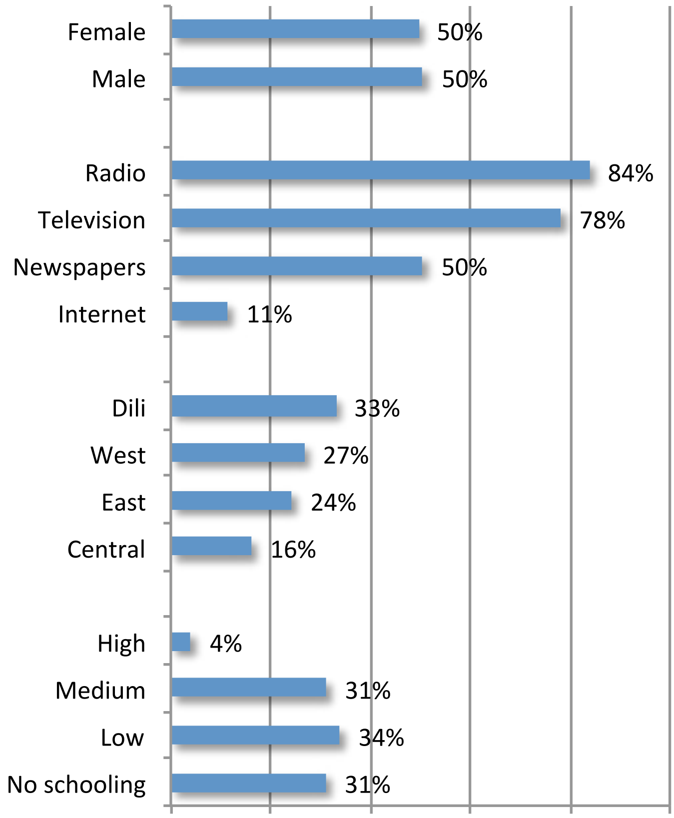


Barriers to use

We asked what impedes users from using their mobile phones more. **Graph 70**, on the right, shows that the top two reasons are cost-related: 56% said services are too expensive and 45% said a phone is too expensive. The third reason (22%) was a lack of services. 20% said they don't own a phone, and 5% said they don't know how to use a mobile phone.

Mobile phone users profile

GRAPH 71. MOBILE PHONE USERS PROFILE
N=1517 (mobile phone users)



We can make several observations about the profile of mobile phone users. As shown in **Graph 71**, on the left, there is gender parity; men and women have equal access to mobile phones. They also make equal use of mobile phones.

84% of mobile phone users are radio listeners. 78% also watch television. Half of those with access to a mobile phone read newspapers, and 11% of them access the internet.

One in three mobile phone user lives in Dili; 27% live in the western districts; 24% live in the eastern districts and 16% live in the central[13] districts.

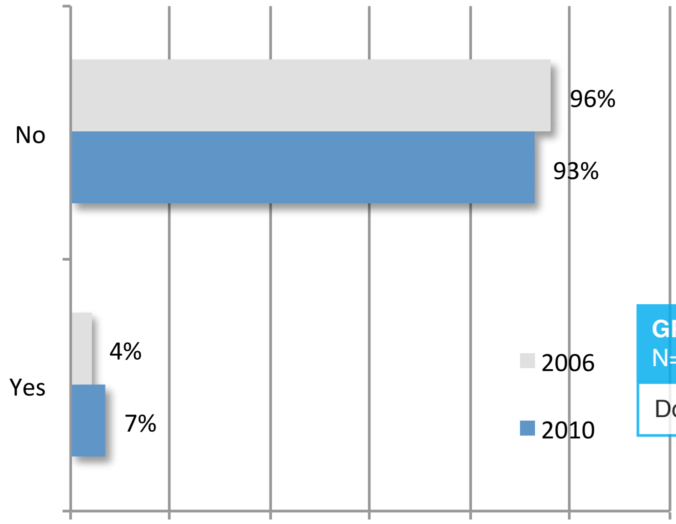
Mirroring the population demographics, only 4% of mobile phone users are highly educated. This means that there is no socioeconomic bias in mobile phone access.

Key conclusions about mobile phone use

- There has been a dramatic increase in access to mobile phones per household – approximately six-fold (now 61%). However, there is significant regional variation in this data (Dili 90%, Oecusse 25%).
- A significant majority of users report making calls as the primary use of their phone. Around half also report using text messages and recognised most of the recent text message promotions and campaigns.
- Cost is considered a primary barrier to greater use of phones.

[13] *In this report, central districts are Dili, Aileu, Ainaro and Manufahi. Western districts are Bobonaro, Liquica, Covalima, Ermera and Oecusse. Eastern districts are Baucau, Manatuto, Viqueque and Lautem.*

INTERNET



GRAPH 72. INTERNET USE
N=2500 (N=1272 in 2006)

Do you ever use the internet? [s]

Internet use

We asked whether respondents or members of their household ever use the internet. **Graph 72**, above, shows that 7% do, almost double the number of those who used the internet in 2006 (4%). This percentage, 7%, is below the 22% of internet users in Asian countries and the 29% in the world. The increase is low compared to the 388% average increase in Asia in the same period[14].

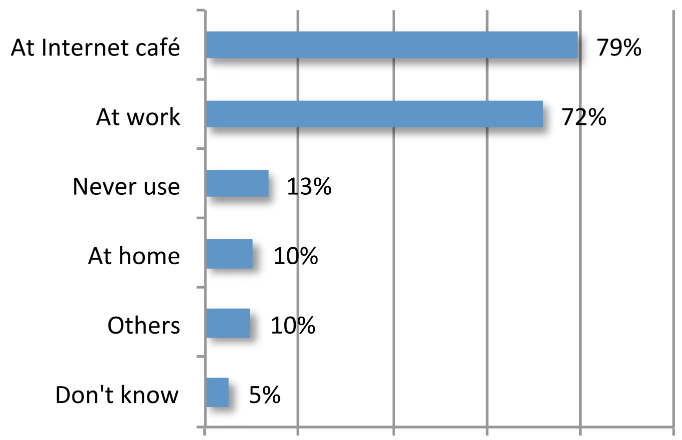
Crosstabs show that 26% of the respondents in Dili use the internet or someone in their household does. There are equal numbers of male and female users; 16% of 15- to 20-year-olds use the internet; 61% of highly educated and 40% of high-income families use the internet.

The survey found that eight in 10 users access the internet at least once a week. This means that the weekly reach of the internet is 5.6%.

Locations and purpose of access

We asked respondents where they usually access the internet. As can be seen in **Graph 73**, on the right, eight in 10 users replied from an internet café. 72% access it at their workplace. Only 10% (or 0.7% of the population) stated they access internet from home. This is consistent with the earlier question where we found less than 1% have internet in their home (**Graph 8**, page 22).

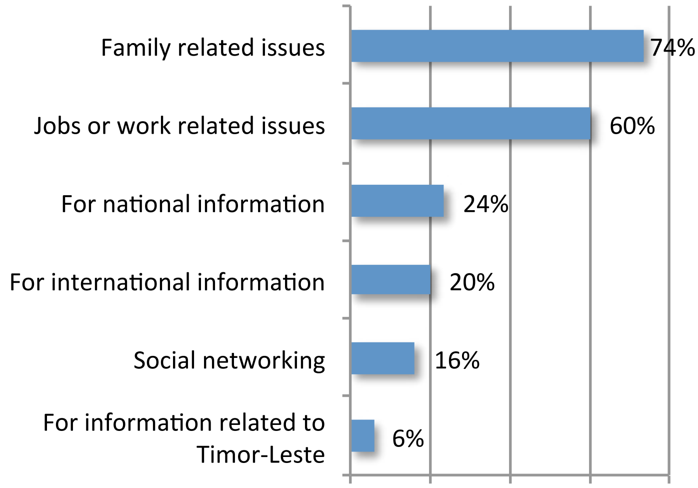
Note that 13% said they never use the internet and other 5% stated they don't know, meaning that someone else at their household is an internet user.



GRAPH 73. PLACES OF INTERNET ACCESS
N=174 (internet users)

Where do you use internet? [m]

[14] *Extrapolated from "Internet Users in Asia," Miniwatts Marketing Group, accessed 15 December, 2010. http://www.internetworldstats.com/stats3.htm*



GRAPH 74. PURPOSE OF INTERNET ACCESS
N=174 (internet users)

What do you use internet for? [m]

We asked respondents what their purpose was when accessing the internet. **Graph 74**, on the left, shows that 74% stated they access the internet for family issues. Another 60% accessed the internet for job or work issues.

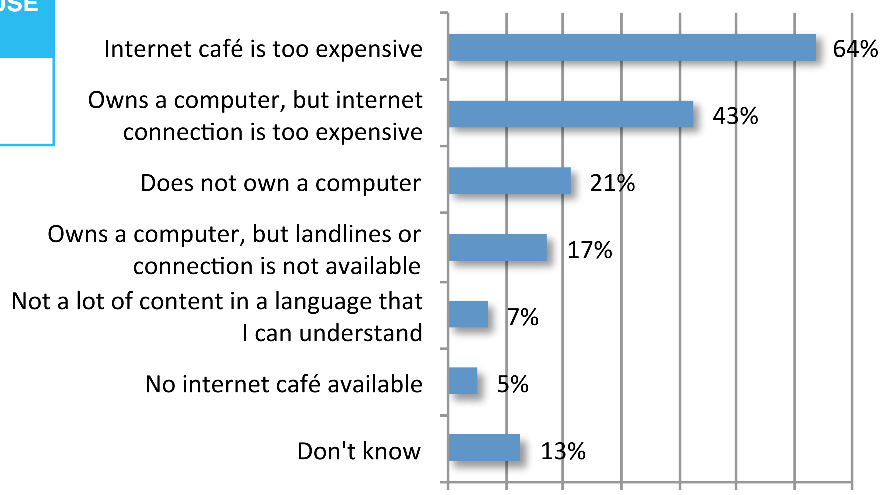
24% accessed the internet for national information, similar to the 6% who accessed for information on Timor-Leste. 20% accessed the internet for information on international issues and opportunities. 16% accessed the internet for social networking.

Barriers to internet use

We asked what are the main reasons stopping people from accessing more of the internet. **Graph 75** below shows that the top two mentioned reasons are cost-related: 64% stated that the cost of using a internet café is too high. 43% stated that, although they own a computer, the cost of connection is too high. 21% stated they don't own a computer. 7% stated they don't use more because of language difficulties. 5% stated there is no internet café near them[15].

GRAPH 75. BARRIERS TO INTERNET USE
N=174 (internet users)

What are the main reasons that stop you from using more of the internet? [m]



[15] *The survey fieldwork was conducted before 3G mobile internet services were introduced by Timor Telecom in October 2010.*

Internet users profile

Graph 76 on the left shows the profile of internet users in Timor-Leste. Almost all (99%) internet users watch television, own a mobile phone and listen to a radio at some point in time. Nine in 10 internet users also read newspapers or magazines.

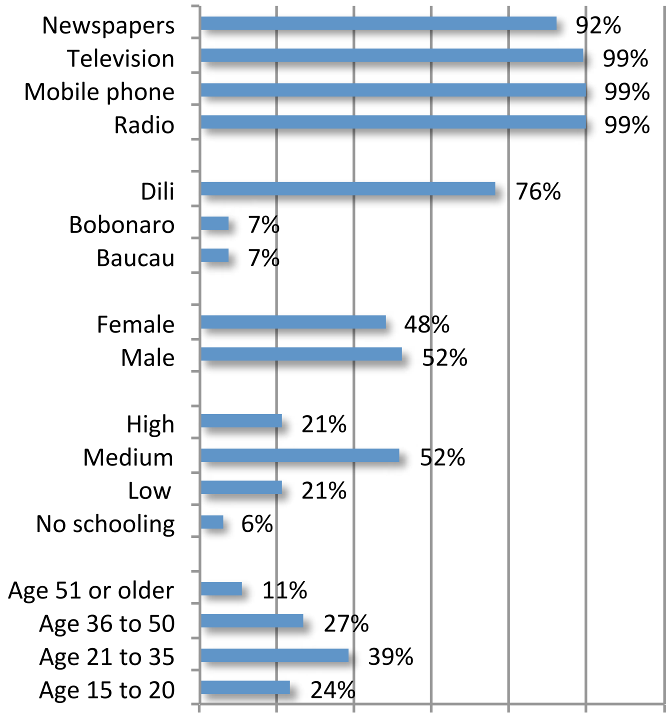
76% of internet users reside in Dili. The other districts with a significant number of internet users are Bobonaro and Baucau.

The ratio of male and female users is balanced.

Internet users' education, as expected, does not mirror that of the general population, as 73% of users are either highly or medium educated.

63% of users are below the age of 35 years.

GRAPH 76. INTERNET USERS PROFILE
N=174 (internet users)



Key conclusions on internet use

- Use of internet has nearly doubled since the 2006 survey, but is still low compared to neighbouring countries in both absolute terms and rate of increase.
- Internet cafe's and workplaces are the primary places of internet use.
- The majority of internet users are in Dili.

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MEDIA COMPARISONS

Reach comparisons

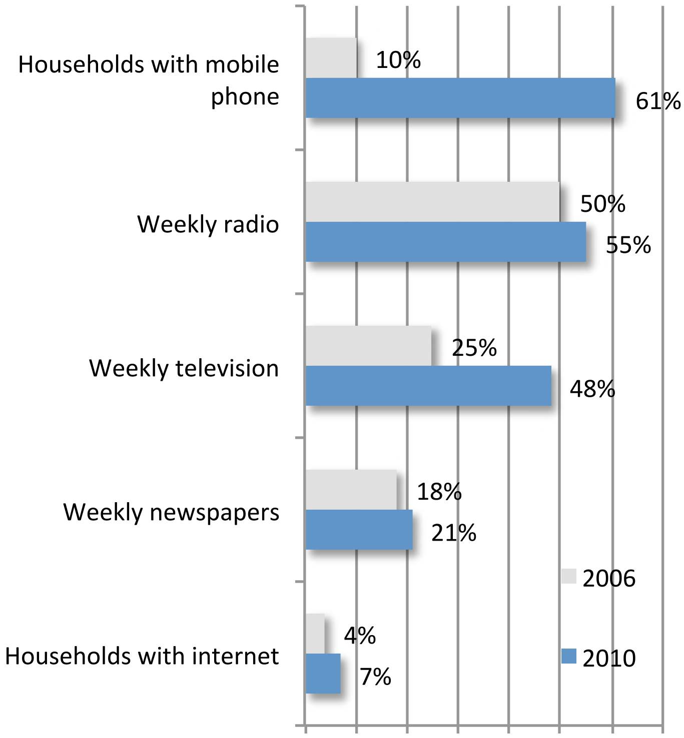
Graph 77, on the right, compares the reach of media and communication tools in Timor-Leste.

Mobile phone is now the communication tool with the highest penetration. 61% of households in Timor-Leste now have access to a mobile phone – a six-fold increase from 10% in 2006.

Radio is second, growing to 55% (up 5% from 2006). Television weekly reach has nearly doubled from 25% in 2006 to 48% today.

Newspaper weekly reach is now 21%, increasing from 18% in 2006[16]. Households with internet are now 7%, up from 4% in 2006.

GRAPH 77. REACH COMPARISON
Percentages of the population

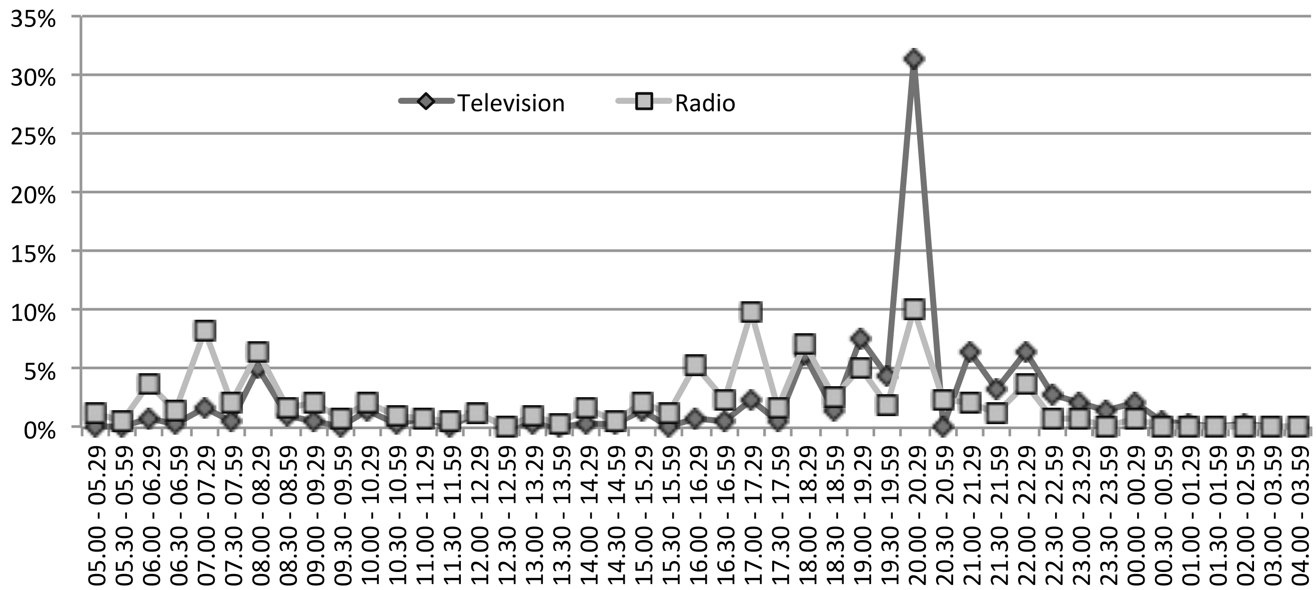


[16] *Figures on newspaper weekly reach from the 2006 survey were compiled by Graham Mytton.*

Television and radio times

Graph 78, below, compares television viewing and radio listening times. The survey found that peak times, or 'prime time', for both television and radio are similar. In the morning, the peak time for both radio and television is between 06:00 to 08:30 and, in the afternoon, between 16:00 to 20:30. For television there is a sharp increase in viewers at 20:00-20:30, during the broadcast of *Telejornal Tetum* on TVTL.

GRAPH 78. PRIME TIME COMPARISONS
Percentages of audiences



Key conclusions on media comparisons

- Radio still has the highest reach of any individual medium, although television is catching up. As a source of information, community leaders are still the most accessed and most trusted sources.
- Mobile phone penetration is now a significant communication tool.

OPINIONS ON MEDIA

Opinions on RTL and TVTL

The 2006 Hirondelle Survey asked several questions about RTTL – Timor-Leste's national radio and television broadcaster. The questions were asked on a four-points scale from 'strongly agree' to 'strongly disagree'. We asked similar[17] questions in this survey with several modifications: we changed the scale into five-points; we listed RTL and TVTL instead of RTTL and we asked the questions using a third-person technique[18], which helps to avoid bias. Please take into consideration that these modifications improve accuracy but reduce comparability with the 2006 survey data.

The exact question used in this survey was: *"I am going to read several sentences, and I need to ask about your friends' opinions, not yours. Use a scale from 1 to 5 as this card shows where '1' means they STRONGLY AGREE and '5' means they STRONGLY DISAGREE. You can use any number in between."*

Results are shown on **Graph 79**, on page 79, presented from the statement receiving the most positive responses (1 and 2) to the least. Please also note that the last three statements at the bottom are negative statements, so if respondents agree (1 and 2), that means a negative opinion.

There are strong positive opinions:

1. RTL and TVTL have a role in promoting Tetum as the country's language.
2. RTL and TVTL are the people's radio and television.
3. RTL and TVTL are educating the people.
4. RTL and TVTL understand the needs of the people.
5. RTL and TVTL are controlled by an independent board.

Half the respondents provided positive feedback about the statement that RTL and TVTL have programmes of high quality. 45% give a positive evaluation to the statement that RTL and TVTL are impartial about parties and factions.

43% stated they disagree with the statement that the stations are wasting money. The other 28% agree with this statement, while another 43% replied they don't know.

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[17] *In future studies, researchers might need to rework these statements. They were adopted to assure a degree of comparability of opinion, but it is still difficult to explain these concepts and ask them to the general population.*

[18] *A verbal or visual representation of an individual and his/her situation is presented to the respondent; the respondent is asked to relate the attitudes or feelings of that person; researchers assume that talking in the third person will minimize the social pressure to give standard or politically correct responses. For more information go to: http://en.wikipedia.org/wiki/Qualitative_marketing_research*

41% disagree that the radio and television stations have too much foreign content and not enough about Timor-Leste. 36% agreed with this statement, while 42% replied they don't know.

Although 58% stated they agree with the statement that an independent board controls RTL and TVTL, 59% also agree with the contradictory statement that the government controls the stations. From the focus groups, we learned that this confusion is caused possibly by a lack of understanding about the need for, and role of, an independent media in democracy.

These opinions all had a majority agreement in 2006 and 2010. The only change is that this time they seem to be more definite with more "strongly" agreeing.

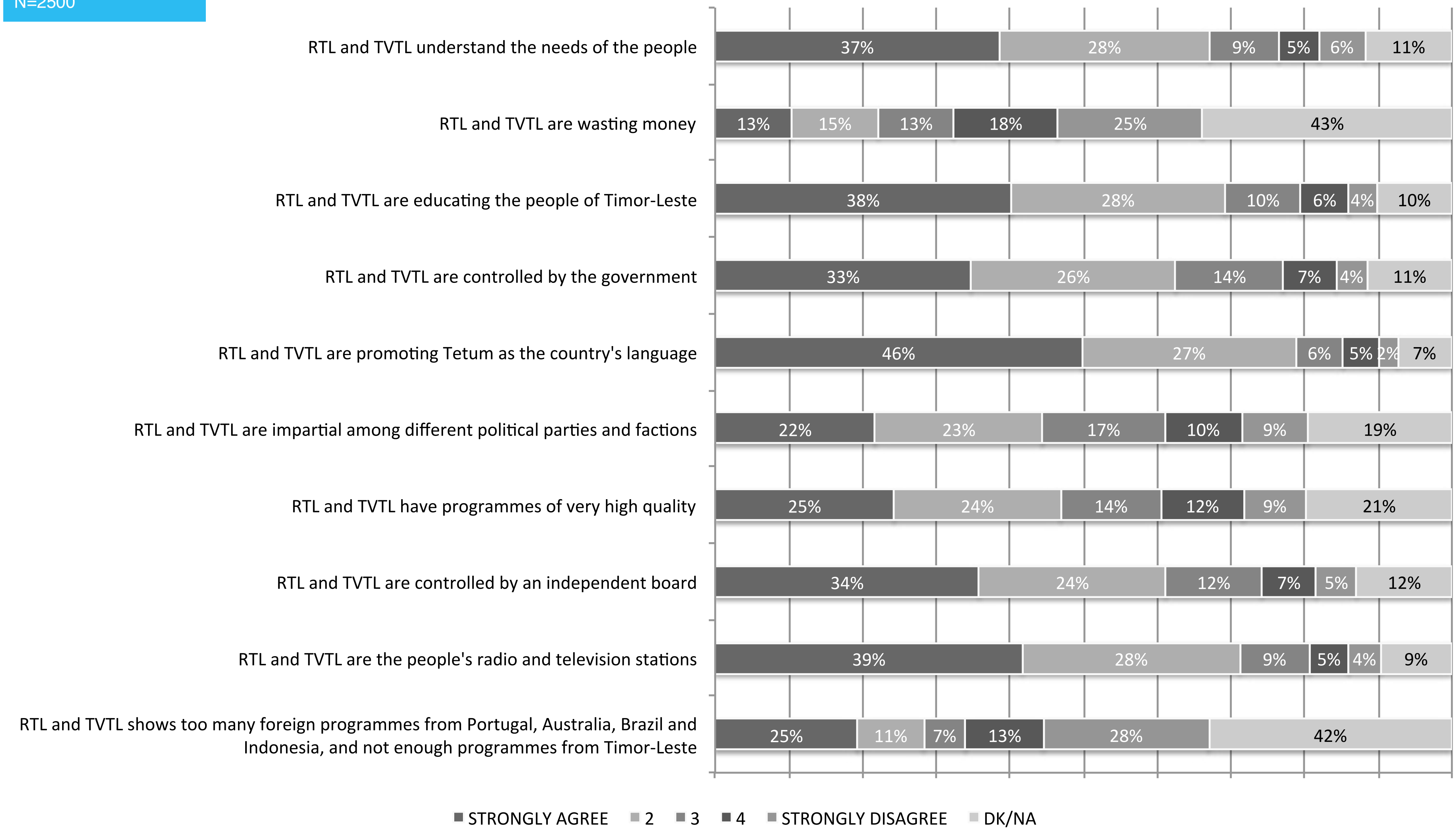
One other opinion appears to have changed slightly: the opinion that the public broadcaster has programmes of a very high quality, had 53% agreement in 2006, whereas now the figure is just under 50%.

In both surveys, slightly less than half agreed that RTTL is impartial about different parties and factions.

One negative development is that now a majority (59%) believe that the government controls RTTL, while in 2006 less than half (45%) believed this. There is one apparent contradiction between this and the view that RTTL is run by an independent board. This is an illustration of the fact that people often hold contradictory opinions. It may be that many Timorese believe that while there is a nominally independent board, it remains true that the station is at least in some respects the mouthpiece of the state and government and that this is not necessarily seen in a negative way by many people.

The two other opinions measured were that RTTL wastes money and that it shows too many foreign programmes. Slightly more (from 23% to 28%) believe that it is wasting money, and similarly rather more respondents (from 25% to 36%) believe that there are too many foreign programmes.

GRAPH 79. OPINIONS ON RTL AND TVTL
N=2500



Role of media in Timor-Leste

Using the same third person technique, we asked respondents for their opinions on the role of the wider media (not just RTTL). Interviewers read six statements about media and respondents were asked to state 'what they thought a friend's opinion on these statements would be' – a technique that should enable respondents to express their opinions more freely.

Graph 80, on the following page, lists the statements with the most positive responses on the left and the most negative on the right. 68% agreed with the statement that "media needs to check facts and make corrections if they make mistakes" – indicating strong support for the principle of accuracy in journalism. 68% agreed that "media should investigate allegations of corruption and inform the public" – supporting the investigative role of media as a "watchdog", alerting the public when things go wrong.

64% agreed with the statement that "the news media should cover all political parties and ensure that different opinions are given equal treatment", in line with the principle of balanced reporting.

The last two statements at the bottom of the graph are negative. Therefore, agreement with these statements indicates a negative opinion about the role of the media. Opinions about these statements are split between positive and negative.

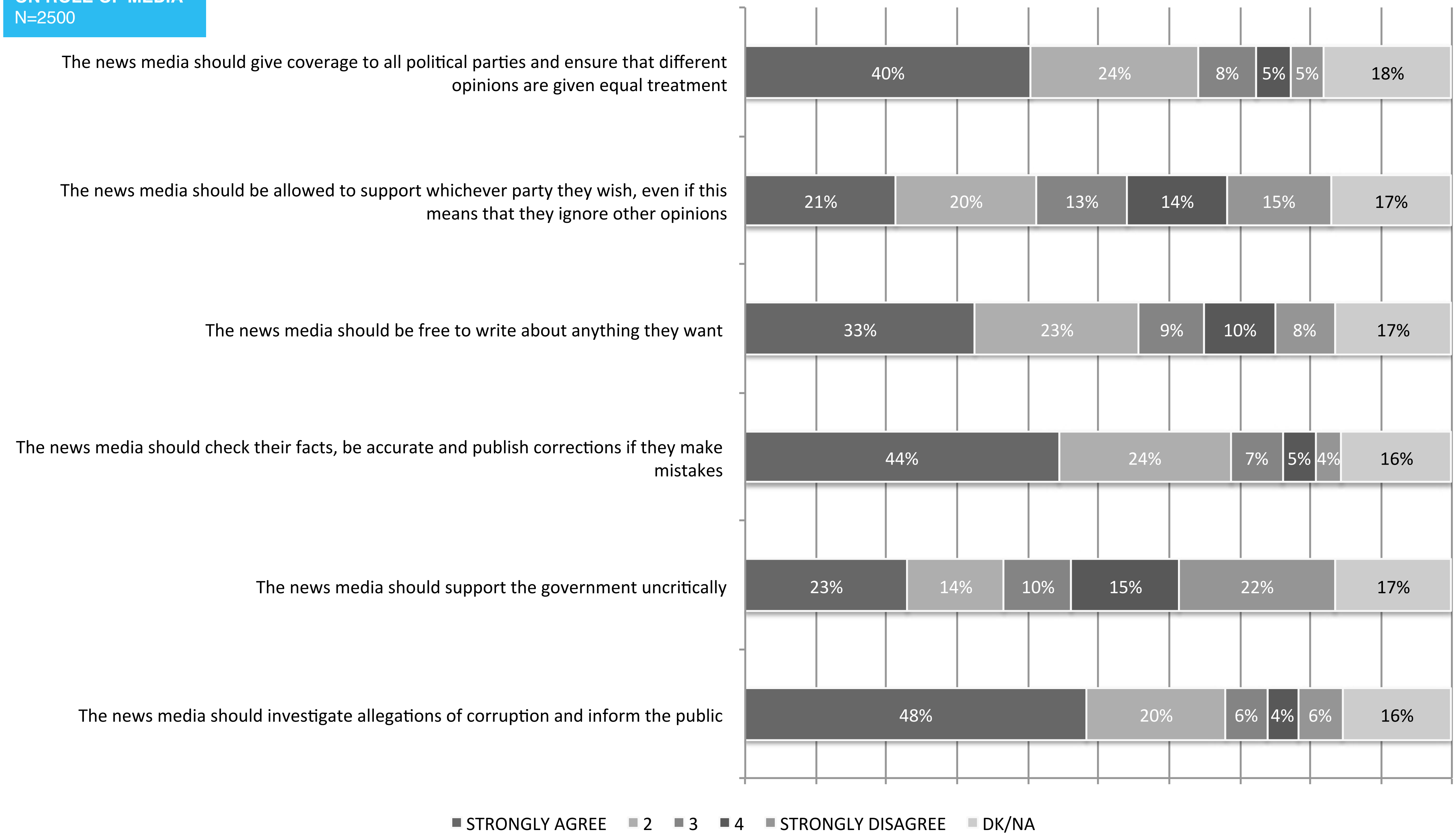
There is mixed opinion on the statement that "the news media should support the government uncritically" with 37% agreeing and 37% disagreeing. This finding does not support the idea that the press should be part of the checks and balances of a democratic society.

Similarly, 41% agree/strongly agree with the statement that "the news media should be allowed to support whichever party they wish, even if this means ignoring other opinions" and only 29% disagree or strongly disagree with this statement. This shows a lack of support for the principle of balanced reporting.

Focus group findings on role of media

- *There is a more traditional notion about the role of the media in society: it is seen as the government's channel to share information.*
- *Consumers in the districts expressed frustration and consider the media as 'lazy' and as only presenting news about events in the capital, seldom, if ever, going to remote rural areas.*

GRAPH 80. OPINIONS ON ROLE OF MEDIA
N=2500



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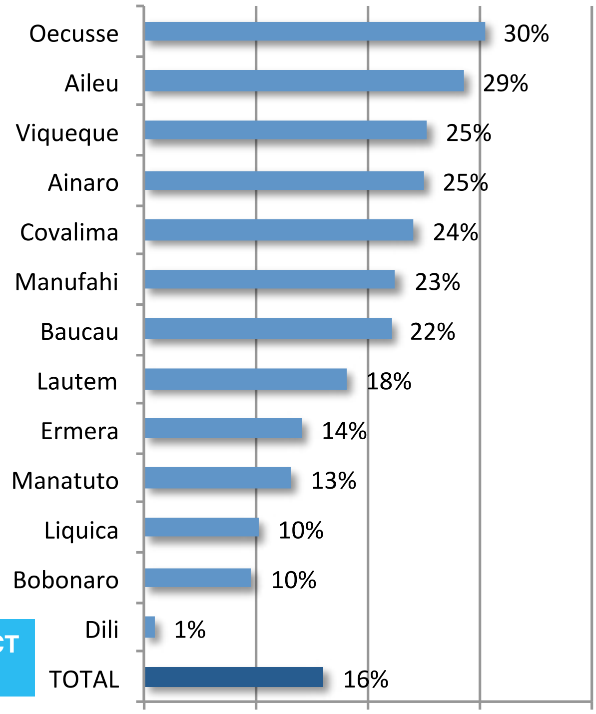
NON-USERS OF MEDIA



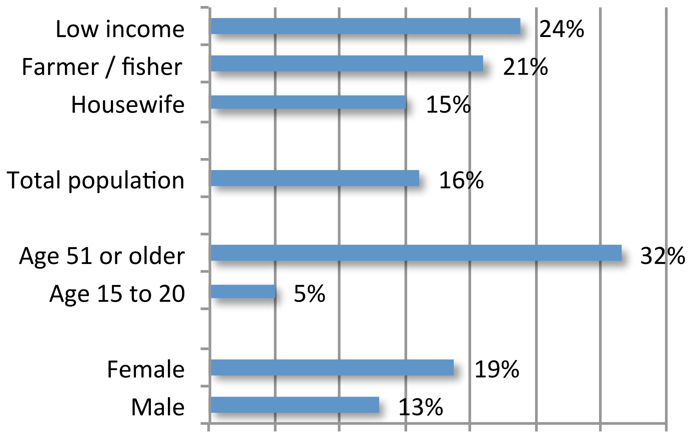
GRAPH 81. NON-USERS OF MEDIA PER DISTRICT
Percentage of the population

Who are the non-users of media?

A significant percentage of the population does not access any form of traditional media. We have called them 'non-users of media' in this survey.

Graph 81, above, shows the percentages of these non-users: the people that do not access television, radio, newspapers, magazines, mobile phone or internet.

The national average percentage of non-users of media in Timor-Leste is 16%. The five districts with the smallest percentage of non-users of media are: Ermera with 14%, Manatuto with 13%, Liquica with 10%, Bobonaro with 10% and Dili with 1%. The highest percentage of non-users of media is in Oecusse (30%). This is not unexpected, as the exclave is known to suffer problems due to its isolation from the rest of Timor-Leste.



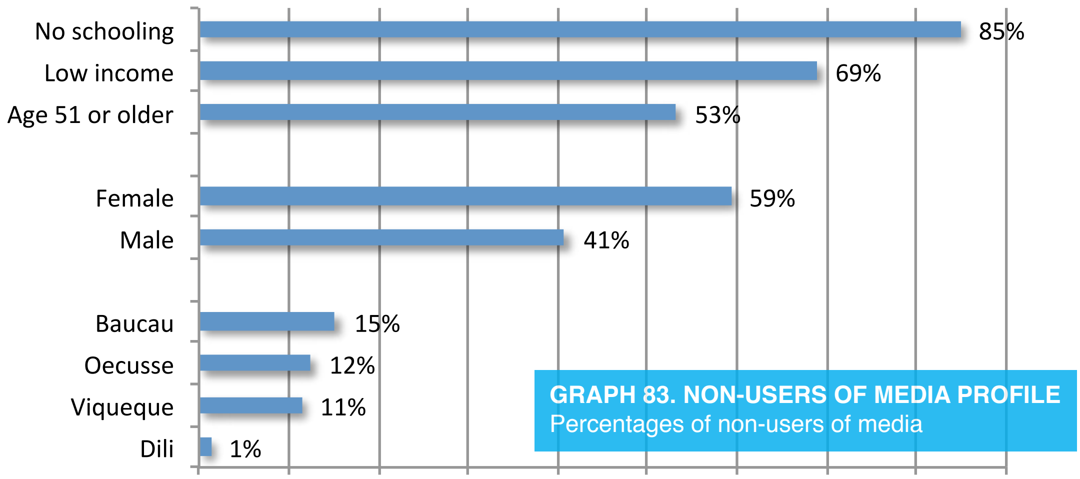
GRAPH 82. NON-USERS OF MEDIA ACROSS DEMOGRAPHIC GROUPS
Percentage of the population

Graph 82 on the right shows the percentage of non-users of media among key demographic groups. Non-users are more numerous among low-income respondents. 24% of those of low income are non-users; 21% of farmers and fishers are non-users; and 15% of housewives have no access to any of the five media.

The percentage of non-users among people aged 51 or older (32%) is double the national average. 19% of females are non-users, against 13% of males.

Graph 83, below, shows the profile of non-users of media. 85% of non-users have no schooling. 69% have low income. One in two non-users of media are aged 51 years or older. Six in 10 are female.

Only 1% of non-users of media reside in Dili. 15% reside in Baucau, 12% in Oecusse, and 11% in Viqueque.



GRAPH 83. NON-USERS OF MEDIA PROFILE
Percentages of non-users of media

APPENDICES

Margin of error table

How to use the table[19] to work out accuracy of results:

1. The table below provides margins of error for developing a 95% confidence interval.
2. Look up the sample size closest to the sample base of the estimate in the left column.
3. Look up the sample proportion closest to the estimate across the top row.
4. The percentage where the two cross represents the margin of error.
5. For example, how accurate is the information that 51% of all respondents in a sample of 1620 think X. The sample base is 1620 so we go to the column where N=1600. The proportion closest to the estimate of 51% is 50%. Where the two cross, we find the percentage 2.5%. That means, 51% +/- 2.5% of the population thinks X. In other words, we can be 95% confident that between 48.5% to 53.5% of the population thinks X.

Sample Size	**Sample Proportion**									
(N)	**5% or 95%**	**10% or 90%**	**15% or 85%**	**20% or 80%**	**25% or 75%**	**30% or 70%**	**35% or 65%**	**40% or 60%**	**45% or 55%**	**50%**
30	7.8%	10.7%	12.8%	14.3%	15.5%	16.4%	17.1%	17.5%	17.8%	17.9%
40	6.8%	9.3%	11.1%	12.4%	13.4%	14.2%	14.8%	15.2%	15.4%	15.5%
50	6.0%	8.3%	9.9%	11.1%	12.0%	12.7%	13.2%	13.6%	13.8%	13.9%
75	4.9%	6.8%	8.1%	9.1%	9.8%	10.4%	10.8%	11.1%	11.3%	11.3%
100	4.3%	5.9%	7.0%	7.8%	8.5%	9.0%	9.3%	9.6%	9.8%	9.8%
150	3.5%	4.8%	5.7%	6.4%	6.9%	7.3%	7.6%	7.8%	8.0%	8.0%
200	3.0%	4.2%	4.9%	5.5%	6.0%	6.4%	6.6%	6.8%	6.9%	6.9%
250	2.7%	3.7%	4.4%	5.0%	5.4%	5.7%	5.9%	6.1%	6.2%	6.2%
300	2.5%	3.4%	4.0%	4.5%	4.9%	5.2%	5.4%	5.5%	5.6%	5.7%
400	2.1%	2.9%	3.5%	3.9%	4.2%	4.5%	4.7%	4.8%	4.9%	4.9%
500	1.9%	2.6%	3.1%	3.5%	3.8%	4.0%	4.2%	4.3%	4.4%	4.4%
600	1.7%	2.4%	2.9%	3.2%	3.5%	3.7%	3.8%	3.9%	4.0%	4.0%
700	1.6%	2.2%	2.6%	3.0%	3.2%	3.4%	3.5%	3.6%	3.7%	3.7%
800	1.5%	2.1%	2.5%	2.8%	3.0%	3.2%	3.3%	3.4%	3.4%	3.5%
900	1.4%	2.0%	2.3%	2.6%	2.8%	3.0%	3.1%	3.2%	3.3%	3.3%
1000	1.4%	1.9%	2.2%	2.5%	2.7%	2.8%	3.0%	3.0%	3.1%	3.1%
1200	1.2%	1.7%	2.0%	2.3%	2.5%	2.6%	2.7%	2.8%	2.8%	2.8%
1400	1.1%	1.6%	1.9%	2.1%	2.3%	2.4%	2.5%	2.6%	2.6%	2.6%
1600	1.1%	1.5%	1.7%	2.0%	2.1%	2.2%	2.3%	2.4%	2.4%	2.5%
1800	1.0%	1.4%	1.6%	1.8%	2.0%	2.1%	2.2%	2.3%	2.3%	2.3%
2000	1.0%	1.3%	1.6%	1.8%	1.9%	2.0%	2.1%	2.1%	2.2%	2.2%

[19] *Source: Taylor Nelson Sofres, market research specialists.*

Focus groups findings

Language use

- Timor-Leste is a linguistically diverse country. Most people think that people want to speak their own local languages and that the ability to speak other languages is only needed to socialize with people from outside and in school. There is an indication that 'Tetum Dili' has been more and more accepted as the language with which people interact with outsiders. This notion was reflected in our focus groups such as the one conducted in Lospalos: *"Many here use Fataluco in everyday conversations; it's the language of our ancestors and would be difficult not to speak it. We do use Tetum on some occasions, such as when we have visitors from the city or other districts. Also when we go there."* A farmer from Lospalos, 25 years old.
- Language is perceived as one of the main elements of the Timorese cultural identity. The discussants mentioned social sanctions, mockery and prohibitions against speaking anything other than local languages except when talking with people from outside, in schools or when travelling to Dili. There is social pressure to maintain local languages. It was mentioned, at the focus group in Viqueque: *"We have to speak Tetum Terik when we are with family … It is the language of our ancestors … They will laugh at us if we use Tetum Dili or Portuguese, except of course when we talk with outsiders."* A farmer from Viqueque, 25 years old.
- There are criticisms of the government's efforts to promote Tetum as an official language: lack of formal Tetum study in school and not enough facilities for the public to improve Tetum skills. Comments such as these have to be balanced against the fact that formal Tetum education is still under development, and that the age cohort of this survey is 17 years of age and older. Younger pupils have had Tetum classes and adult Tetum literacy programmes are in place. These findings indicate a still high demand for Tetum language training. One respondent illustrates this: *"I really want to be able to speak Tetum and Portuguese but there is no support … I can only learn a little from school … While there are several courses open here for English."* A student from Ermera, 22 years old.
- Portuguese is regarded as the language of the 'haves', the elites and the educated; hence, the 'have-nots', the ordinary people, should not (or don't need to) study it. *"I'm uneducated and I never use Portuguese … If I try to, maybe my friends will consider me a boastful person …"* A farmer from Oecusse, 23 years old.

Information sources

- Community leaders are trusted by all demographic groups and continue to serve as an important source of information. The focus group in Ermera illustrates this: *"I think the source of information I trust more is my aldeia leaders; they know what we need and they are close to us."* A farmer from Ermera, 32 years old.
- All mobile phone users received information through text messages. There was a lot of dissatisfaction about these messages. Many discussants believed them to be deceitful. There are indications that this might undermine the credibility of information sent through text messages. *" I don't think we can trust information sent through text messages … All are usually lies … Maybe it's just a way to get us to buy more credits."* A student from Dili, 25 years old.

Radio

- There is agreement that there are more people now listening to the radio. It has become more accessible, receivers are as cheap as $3 and it is relatively easy to listen to since it may run on batteries. *"I listen to radio and I can take the receiver anywhere I go. I buy batteries and they usually last for two weeks."* A small trader from Ermera, 25 years old.
- Many people are aware of interactive programmes but few are interested in participating. Reasons cited include:
  1. Cost to participate (although most interactive programmes use toll free numbers).
  2. Networks are always busy.
  3. They don't think their opinion matters.
  4. Some believe you need to be an expert to participate.
- At the focus group in Oecusse, a participant mentioned: *"I'm afraid to participate … Calling the station might cost a lot of money … Maybe even to say a few words will cost me $10 so it's too expensive."* A farmer from Oecusse, 33 years old.

Television

- There is a notion that more people are now watching television. Almost all *sedes de suku* have a television – although it may not be in working conditions. Many people watch television in their neighbour's house, some for free and others for a small fee (five cents, for example). Intermittent electricity supply is a barrier to watching television. *"I can only watch television every now and then since electricity is not on all the time. Power cuts occur often in my aldeia."* A teacher from Manatuto, 40 years old.
- There are criticisms about the quality of news and entertainment programmes on television. People want to see more local content both for entertainment and news. There is also criticism about foreign soap operas and entertainment broadcasted on TVTL. Our focus group in Manatuto recorded: *"The broadcast is of poor quality … Many Portuguese movies are not really appropriate to watch … Can't they make something better and of more quality?"* A student from Manatuto, 29 years old.

Newspapers

- From the focus groups we identified the main reasons behind the relatively low readership as cost, illiteracy, distribution and quality.
- Newspapers and magazines in Timor-Leste cost about $1, which is considered expensive in a country where half the population earn less than $10 per month. Informants stated that not many of them and their family members read at all so they never read newspapers. *"There is no newspaper here … Nobody sells or buys them … Where would I get the money from? So I won't buy it. I just go to my neighbour's house to watch the news for free."* A farmer from Ermera, 32 years old.

- From the focus groups, it is clear that distribution remains a problem anywhere outside of Dili. Some informants said they were interested in reading newspapers and magazines but complained about the difficulties in obtaining up-to-date newspapers and magazines. Some experienced delays in distribution of up to two weeks. The focus group in a remote area in Manatuto recorded: *"Some who are interested in reading cannot obtain newspapers here; if you find one, it is probably a week old, sometimes more …"* A teacher from Manatuto, 40 years old.

- Many readers criticize the ability of journalists to present factual and relevant information. Typos, mistakes in naming sources or areas, and other inaccuracies are claimed to occur regularly. Some potential readers are disappointed and consider the media as unable to report news from remote areas and think that journalists put too much emphasis on events occurring in Dili and district capitals. The focus group in Ermera recorded: *"I hope journalists would 'go down' to remote districts to cover news like natural disasters … Often times the information [they report] is incomplete because they don't go to remote areas … They need to improve the way they write news."* A *suku* council member from Ermera, 48 years old. *"I'm not satisfied with them [the media] … They did not report the hurricane which happened here last year … They should have informed this disaster to the public … That's their main responsibility."* A farmer from Ermera, 30 years old.

Role of Media

- There are criticisms about the independence of the media. Several participants mentioned connections between journalists and political parties, and see biases in the media in favour of the ruling elites. "*I think they are sometimes neutral and other times they are not … Everybody knows they need to be independent from government, church or others … Another problem I think is their lack of professionalism … So media is not yet able to play an effective role as a social critic."* A teacher from Manatuto, 40 years old.

- Another criticism was about the relevance and coverage of the news; many consider the media 'lazy' and say it only presents news about events in the national capital. There is a perception that journalists never go to remote, rural areas. Our focus group in Ermera recorded: *"I think journalists do not do their job well. They only cover events in the cities. But to remote areas like ours – they have never set foot here. Although we have a community radio, they [journalists] never reported events from our village."* A *suku* council member from Ermera, 31 years old.

UNMIT

United Nations Integrated Mission in Timor-Leste
Dili, June 2011