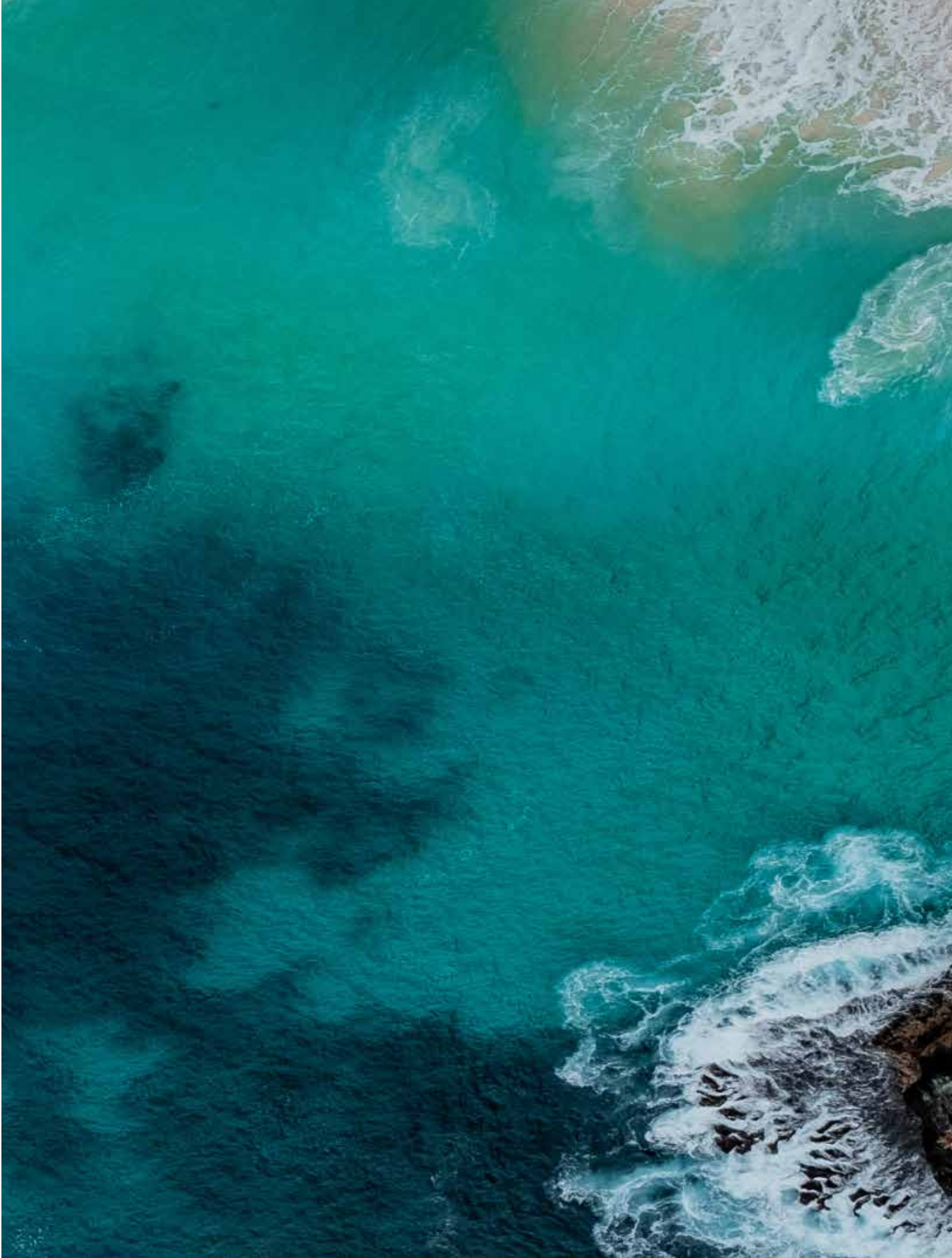


STRATEGIC PLAN FOR



2025 - 2029





VISION

Bringing the World to Timor Leste and Timor Leste to the World



MISSION STATEMENT

To provide effective and sustained representation, services and leadership for the entire tourism sector, supporting businesses of all size to grow and professionalize their activities.



CONNECT

Creating opportunities for members to develop B2B relationships, both domestically and internationally.



SUPPORT

Providing members with information and assistance to professionalize their offer while collaborating with other actors to promote Timor Leste tourism.



LEAD

Delivering proactive representation on tourism-related policy matters while promoting cooperation within the private sector.



BUILD

Developing HOTL Association as an independent, effective and sustainable organization driven by members and fully representative of the sector.



OUR VALUE PROPOSITION

Insight and intelligence that cannot be obtained elsewhere.

OUR VALUES

HOTL Association is guided by the following core values in advancing its vision and mission, and in the treatment of our people, members and stakeholders:

- be member-driven;
- engage openly, proactively, and always non-partisan;
- be entrepreneurial;
- inclusive, collaborative and respectful.

FOREWORD

Since being established in 2019, the HOTL Association has grown from a 5-member organization concentrated on accommodation providers to a diverse membership of over 70 members serving domestic and international visitors through accommodation, entertainment and attractions, food and beverage, and transportation.

As we have grown, so too have our members' expectations in terms of the direction being taken, the priorities pursued and membership value. With a new board elected in March 2024 and driven forward by feedback from members, the new 2025 - 2029 strategic plan seeks to deliver on our members' vision for the HOTL Association.

The Association seeks to graduate to become an inclusive umbrella organization for all businesses operating across the sector, providing effective and sustained representation, services and industry leadership while supporting members of all sizes to grow and professionalize their activities.

Jeremiah Chan
Chairman
HOTL Association





TOURISM IN TIMOR LESTE

Businesses throughout Timor Leste recognize the country's significant tourism potential. With its unspoiled natural beauty, rich history and culture, our nation is well positioned to seize opportunities presented by a resurgence of international travelers and the diversification of visitor markets. Our country is however still young and remains a little-known destination among potential travelers. Much work and investment are needed to build our reputation and infrastructure for the country to establish itself as an internationally recognized and prosperous tourism destination.

In 2014, 55,000 international visitors to Timor Leste generated an estimated USD 14 million in direct benefits to GDP and provided more than 4,300 direct jobs. Our growth potential cannot be understated. Globally, travel and tourism's business volume equals or surpasses that of oil exports, food products or automobiles. The sector is a major player in international commerce and a main source of income and employment for developing countries. Travel and tourism's direct contribution to global GDP recovered to pre-pandemic levels in 2023, reaching an estimated USD 3.3 trillion or 3% of global GDP. While international tourism receipts reached 97% of pre-pandemic levels in the first quarter of 2024, its overall contribution to GDP in 2024 is forecast to reach \$11.1 trillion. Industry growth is marked by increasing diversification, competition between tourist destinations and the search for new, unspoiled and authentic experiences.

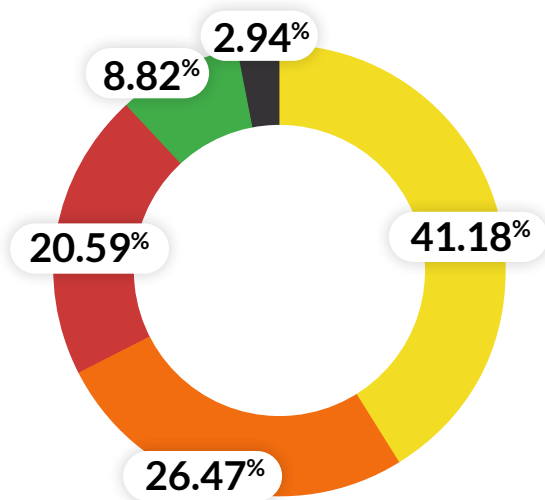
While businesses across Timor Leste's tourism sector are keen to invest in our development through the upgrading and expansion of their operations, the government has a critical role to play in facilitating an enabling business environment.

HOTL Association fully supports the ambitious goals set out in the national tourism policy, "Growing Tourism to 2030 – Enhancing a National Tourism Destination Identity". We applaud recent steps to design a roadmap for the policy's implementation. HOTL Association calls upon the government to recognize that most tourism businesses are micro, small, and medium enterprises (MSMEs) and that our sector has a multiplier effect on the economy, with 1 direct job in the sector creating an additional 1.5 jobs in other industries. We are ready to engage with the government and wider stakeholders to define strategies and interventions that are responsive to business needs and aligned with visitor expectations.



FEEDBACK FROM MEMBERS

In August 2024 HOTL Association surveyed a mix of member (60%) and non-member (40%) businesses serving domestic and international visitors through accommodation, entertainment and attractions, food and beverage, and transportation.



- Tour operator and travel provider

- Lodging and accommodation

- Food and beverages

- Other/mixed (please specify)

- Entertainment and recreation

When asked about the future of HOTL Association, members have made clear their vision for the association's mandate to graduate to a formally recognized sector-wide umbrella organization. In line with this vision, 79% of survey respondents called for designated seats within the board to be allocated to representatives of each of the industry sub-sectors identified above. 69% of respondents called for a designated seat on the board to be allocated for representation of micro enterprises.

On rebranding, 53% of members were in favour of renaming the organization, with 16% uncertain and 3% against. All those surveyed were open to the payment of a membership fee to support the organization in delivering its vision. In addition to payment of membership fees, many of those surveyed are prepared to provide data, information and insights to (a) support HOTL Association (53%) and (b) support lobbying and advocacy work (52%). But with only 32% of members willing to provide direct inputs in policy positions, there is a clear expectation that HOTL Association will develop its organizational capacity to analyze proposals and form policy positions.

STRATEGIC PILLARS

FOR 2025 - 2029



CONNECT

Creating opportunities for members to develop B2B relationships, both domestically and internationally.



GOAL

Become the “go-to” point of contact for business networking and sector insights.

WE WILL ACHIEVE THE GOAL OF THIS STRATEGIC PILLAR BY:

- Organizing regular networking events and social mixers;
- Deliver three speed dating events per year bringing together members with selected service providers, suppliers and other stakeholders;
- Deliver exclusive events for members with keynote speakers;
- Establishing a social media presence to engage members and provide quick insights and updates on topical issues;
- Creating a database of Timor Leste’s tourism-related businesses and of those in key overseas markets;
- Launch a members’ “B2B Benefits Program” offering exclusive savings on products and services between members;
- Distribute digital badges, membership certificates and branded stickers for members to advertise HOTL Association membership;
- Launch an Annual Tourism Business Awards (or recognition program) with high visibility media and events.

WE WILL KNOW THESE ACTIVITIES ARE SUCCEEDING BY:

- Growing event participation and income, as well as positive feedback from members and potential members;
- Growing requests for HOTL Association to provide insights, intelligence and introductions;
- Growing social media following and interactions;
- Growing enrolment and income from the B2B Benefits program;
- Growing request for and prominence of HOTL Association branding among member companies.



SUPPORT

Providing members with information and assistance to professionalize their offer while collaborating with other actors to promote Timor Leste tourism.



GOAL

Improve business performance, visitor satisfaction, and Timor Leste as a destination.

WE WILL ACHIEVE THE GOAL OF THIS STRATEGIC PILLAR BY:

- Establishing a members' library of practical resources, tools, and templates;
- Launching a subscription-based service to share consolidated insights and analysis from regional and international bodies as well as feedback from outbound operators in key markets and visitor satisfaction surveys;
- Offering ad-hoc trainings, both paid and for free, on various business topics through partnerships with selected service providers;
- Developing branded content promoting member products and services to support government, outbound operators, and others to sell Timor Leste as a destination;
- Participate in travel events, trade fairs, trade shows and conferences to represent the sector and promote Timor Leste tourism;
- Launch a sector-owned visitor satisfaction survey through member enterprises.

WE WILL KNOW THESE ACTIVITIES ARE SUCCEEDING BY:

- Growing the number of subscribers and income generated by market insights service;
- Positive feedback on trainings offered and new members recruited through participation in training services;
- Growing demand for distribution, use and visibility of branded marketing materials;
- Improvements, expansion and innovations introduced among member enterprises in response to insights shared;
- Improvements in visitor satisfaction survey results.





LEAD

Delivering proactive representation on tourism-related policy matters while promoting cooperation within the private sector.



GOAL

Improve the enabling environment for business and investment in the sector.

WE WILL ACHIEVE THE GOAL OF THIS STRATEGIC PILLAR BY:

- Establishing a clear business advocacy agenda aligned with the policy priorities of our members;
- Launching a quarterly industry outlook survey to collect data from members on business confidence, sectoral characteristics and short-term trends;
- Establish, build and pro-actively maintain relationships with different ministries donors and development partners;
- Seek out and advocate opportunities to formally represent the sector in government committees, working groups and task forces;
- Extend membership to relevant industry associations and invite their inputs on HOTL Association policy positions;
- Explore opportunities for collaboration around key advocacy messages with Timor Leste's other business membership organizations;
- Organize or collaborate on a quarterly roundtable with donors and development partners to present our members' policy priorities and perspective on key issues.

WE WILL KNOW THESE ACTIVITIES ARE SUCCEEDING BY:

- Growing the number of members that first learned about HOTL Association or decided to join as a result of our policy and advocacy work;
- Clear policy outcomes achieved as a result of advocacy;
- Increasing requests from government for HOTL Association's inputs on policy being proposed, developed or evaluated;
- New opportunities for financial support and collaboration secured from donor and development partners.



BUILD

Developing HOTL Association as an independent, effective and sustainable organization driven by our members that fully represent the sector.



GOAL

HOTL Association achieves financial sustainability without compromising our independence, the principles of good governance, or our organizational values.

WE WILL ACHIEVE THE GOAL OF THIS STRATEGIC PILLAR BY:

Revising the association's structure:

- Commission a review of the articles of incorporation and take action to implement reforms in line with our new vision and mission;
- Establish an interim committee consisting of representatives from key sub-sectors to meet with the board on a regular basis;
- Devising a new tiered membership model, with paid and unpaid options, setting out new membership terms that require members to share data and insights;
- Rebranding of promotional materials to communicate our new vision, mission and priorities;
- Develop a membership brochure and onboarding materials.

Improving the association's capacity to represent business:

- Develop a resource mobilization strategy based on a costing for what is needed for a fulltime secretariat with our own office and equipment;
- Develop and share proposals for funding to support core operations and priority activities;
- Recruit a full time CEO, Membership Engagement Officer, Services Coordinator, Insights and Analytics Officer, and Finance and Administration Officer;
- Develop and maintain a database of all members, potential members and key stakeholders;
- Organize trainings for board members, secretariat staff and selected members on various themes, such as: advocacy and lobbying, economic and social policy, membership engagement, leadership and good governance;
- Join regional and global networks that provide access to resources, information and industry insights of value to HOTL Association members, as well as create opportunities for learning and advocacy.

WE WILL KNOW THESE ACTIVITIES ARE SUCCEEDING BY:

- An expanded board is in place with a new charter setting out updated roles, responsibilities and processes;
- Growing membership recruitment and retention year on year;
- Annual budget is set and achieved for each financial year, with growing income generated from members in proportion to other sources;
- Long-term funding secured to support our core operations;
- An independent secretariat is in place and delivering the strategic plan with minimal intervention or need for operational support from the board and our members.



