



National Tourism Marketing Strategy 2019-2022

Ministry of Information, Culture and Tourism



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Executive Summary

Great investment is being made in tourism development in Laos and great strides forward have been made. The job now is really one of marketing.¹ Of communicating a message that attracts the right tourists: those who desire what Laos already has. And to do so, all stakeholders in Laos's tourism industry itself must themselves appreciate what Laos already has.

This marketing strategy is based on an increased understanding of the true assets Laos offers, and the need for a coordinated strategy that communicates the value of these assets directly to the eyes and ears of the waiting world that desires them.

THE SHIFTS

During the lengthy stakeholder engagement and consultation (this included public- and private sectors and the donor community, in multiple in-person meetings and workshops and the open distribution of the draft documents online for feedback and comments), it was agreed that two major tourism marketing shifts must be made and fully committed to:

GO DIGITAL

The most successful Destination Management Organizations around the world are dedicating more than half of their total marketing budget to digital.

Laos's tourism marketers must rethink their reliance on brochures, posters, street banners and trade fairs, and must move the bulk of the marketing online. This requires a fundamental shift in thinking, as well as a vital investment in training and capacity-building of existing staff.

MAXIMIZE REGIONAL

Rethink China:

Asian cities dominate the global destination rankings thanks to the inexorable rise of Chinese outbound tourism. Laos Tourism must jump onto this bandwagon, not only luring tourists from these large Asian cities, but must actively pursue Chinese tourists directly.

There is a substantial demographic of Chinese tourists – many of them millennials from top tier cities – that does not fulfil the negative stereotypes and that would be attracted to Laos, if the country were marketed to them in the right way.

Differentiate:

Tourism Laos must be pragmatic: tourists are unlikely to be wooed from Thailand, for example, with stuff that Thailand does as well or better than Laos. In order for us to achieve the goal of becoming one of the preferred regional and global tourism destinations, we must find the Unique Selling Points (USPs). We must let tourists satiate themselves in Thailand and come to Laos for something different.

One of the Unique Selling Points, already identified by leading Online Travel Agencies, guidebooks and other private-sector players financially incentivized to market Laos, is an element that so many in Laos tourism want to escape: the timeless, the 'forgotten', the sleepy, the slow... The Quiet.

To differentiate Laos from its neighboring countries' tourism brands, Tourism Laos must position itself through its marketing as a destination that is:

- Peaceful and laidback, rather than too busy and hectic
- About experiences (both natural and cultural), rather than just seeing the sites²

¹ The Value Chain Analysis undertaken on behalf of the Centre for the Promotion of Imports from developing countries (CBI), facilitated by SwissContact, in 2017 noted that "Majority of European tour operators highlighted there is little knowledge about Laos among their target markets and thus few tourists request the destination."

² Laos Brand Strategy & Culture v3 'Brand Position' by QUO, pp40-41.

STRATEGIC MARKET POSITION

This marketing strategy integrates and builds on the plans and tasks already outlined in the *Laos Destination Management Plan 2016 – 2018* (DMP), the *ASEAN Tourism Strategic Plan 2016 – 2025* and *Mekong Tourism Marketing Strategy and Action Plan 2015 – 2020*.

In fact, it is the opening two lines of the Destination Profile of the *Lao PDR Tourism Destination Management Plan 2016-2018* that frame what this marketing strategy proposes as the key marketing message for Laos:

- *Lao PDR is centrally located in **the heart of the Greater Mekong Region and South East Asia**.*
 - The first premise of this Tourism Marketing Strategy is that Laos's appealing uniqueness is that it is the quiet heart of SE Asia.
 - The quiet draws those with hurried lifestyles or over-stretched tourist itineraries.
 - The heart not only indicates a geographic position at the very center of this appealing region, but also symbolizes love, authenticity and the life force.

TARGET MARKETS

From an implementation perspective, this strategy divides tourists into four areas of geographic focus: Domestic (residents and long-term visitors travelling within Laos), Neighbors (Thailand, Vietnam, Myanmar and Cambodia), China, and Long-haul (primarily ASEAN, European, Americas and Australia).

Following international best practice, a Content and Community Management Team of international experts will be contracted to create and target content directly at these geographic and linguistic entities.

In terms of what that content is, however, the focus will be on traveler *types* rather than *countries*. Through multiple tourism stakeholder meetings during 2016-2017³ the following primary audiences were discussed and agreed: ⁴

- **Active:** Seeking to enjoy outdoor leisure and recreational activities of interest.
- **Exploration:** Willing to see and explore all a destination has to offer
- **Novelty:** Desire to find something new – whether a tangible place to visit or intangible life experiences.
- **Recharge:** Chance to unwind and escape in a peaceful destination – whether alone or with others.

PREFERRED TOURISM DESTINATION POTENTIAL

Can Laos become a “preferred regional and global tourism destination” as per the stated vision?

Despite the limited capacity of Laos Tourism stakeholders, and the extremely strong competition from the surrounding country brands, Laos also has many untapped opportunities. The world is changing in a way that is beneficial to Laos: global stress and conflict are on the rise. Laos offers a refuge. It is a place of peace and tranquility. A place that can offer the modern traveler of today qualities that are lacking in their home lives, and which are not offered by the competitive destinations of SE Asia.


If all stakeholders collaborate, telling the same story, sharing the same message, amplifying the Unique Selling Points of Laos, the answer is yes: Laos can become a preferred regional and global tourism destination.

This strategy builds on what Laos already has in place, and provides a practical map to that preferred outcome. If all stakeholders adhere to this strategy, Laos will be well on its way to achieving the vision of becoming a leading sustainable tourism industry that contributes to pro-poor local economic development by 2022.

3 National Branding Workshop on 30 September 2016 at SwissContact Offices, National Branding Workshop on 21 February 2017 at SwissContact Offices, Lao Tourism Marketing Taskforce Meeting on 11 April 2017 at MICT, Workshop on Laos Tourism Branding on 9 May 2017 at Muong Thanh Luxury Vientiane Hotel, Laos Marketing Strategy meeting on 30 June 2017 at SwissContact offices, Tourism Marketing Taskforce meeting on 15 November 2017 at MICT.

4 *Laos Brand Strategy & Culture v3* 'Target Audience Summary' by QUO, p30, in which Quo notes that “The primary and secondary target audiences are intended to be aspirational. In the branding process, it is important to not only understand today's traveler but also consider what the ideal traveler might be.”

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Introduction

The vision for tourism in Lao PDR (2012 – 2020)⁵ is:

1. Develop a leading sustainable tourism industry that contributes to pro-poor local economic development.
2. Become one of the preferred regional and global tourism destinations.

In 2016, tourism was the third largest contributor to export revenue, after minerals and electricity (hydropower).⁶ Historic growth figures suggested Laos should expect a further increase in visitor numbers of above 6% per annum. However, since 2016 this trend has changed, with a drop of 9.6% in 2016 (4,215,285 visitors), and a further drop of 8.6% in 2017 (3,851,849). Only China showed an increased number of visitors to Laos in 2017.

While this drop can be attributed to many external factors, with the main decrease being in Thai and Vietnamese visitors, the reasons behind it should be fully and pragmatically explored. Tourism Laos⁷ has its work cut out for it. World tourism figures are increasing, with Asia Pacific the leading beneficiary. Laos must act to own its share of profitable tourism receipts.

Great investment is being made in tourism development in Laos and great strides forward have been made. While mention continues to be made about lack of tourist activities, underdeveloped facilities at tourist sites, and the absence of direct flights to many countries, the job now is really one of marketing.⁸ Of communicating a message that attracts the right tourists: those who desire what Laos already has. And to do so, Tourism Laos must appreciate what Laos already has.

This Marketing Strategy is based on an increased understanding of the true assets Laos offers, and the need for a coordinated strategy that communicates the value of these assets directly to the eyes and ears of the waiting world that desires them.

THE BIG SHIFTS:

Two major tourism marketing shifts must be made and fully committed to by Tourism Laos:

GO DIGITAL

Connected travelers are here to stay. As such, it is imperative that travel players rethink their long-standing strategies in order to appeal to this new consumer type, which is more impatient, connected, demanding and informed than others.⁹

Tourism New Zealand has truly embraced digital marketing to amplify their visitors' stories – so much so that 90% of their global marketing spend is digital, and in some markets, 100% digital.¹⁰

Laos tourism has substantially limited marketing budgets in comparison to many of its competitors. But this is chicken-and-egg stuff: substantial increases in tourism receipts would provide more marketing monies. For now, ramping up digital spend will mean reducing spend elsewhere, and that might mean trade fairs and printed publications.

MAXIMIZE REGIONAL

In 2016 Hong Kong was the most visited city in the world, followed by Bangkok, which overtook London in 2015, according to Euromonitor International, who note that Hong Kong's "benefiting from its strategic location and relationship with China."

"Asian cities dominate the global destination rankings thanks to the inexorable rise of Chinese outbound tourism. In 2010, 34 cities from Asia Pacific were present in Euromonitor International's ranking. This jumped to 41 cities in 2017 and is expected to grow to 47 cities in 2025. Asia Pacific is the standout region that has driven change in the travel landscape and is expected

⁵ Lao PDR Tourism Destination Management Plan 2016-2018

⁶ 2016 Statistical Report on Tourism in Laos, Ministry of Information, Culture and Tourism

⁷ In this document, 'Tourism Laos' and 'Laos tourism' refers in the broadest sense to all the stakeholders and initiatives focused on achieving the above vision set out for tourism in Laos, not just those in the public sector or any specific government ministry.

⁸ The Value Chain Analysis undertaken on behalf of the Centre for the Promotion of Imports from developing countries (CBI), facilitated by SwissContact, in 2017 noted that "Majority of European tour operators highlighted there is little knowledge about Laos among their target markets and thus few tourists request the destination."

⁹ 'Brands must rethink engagement with the new digitally connected traveler', Euromonitor International via <https://skift.com/2017/12/18/brands-must-rethink-engagement-with-the-new-digitally-connected-traveler/>

¹⁰ 'Tips for smarter digital marketing from Tourism New Zealand', *Think!*, September 9, 2016 via <https://destinationthink.com/smarter-digital-marketing/>

to continue doing so in the coming decade with Singapore overtaking London as the third most visited city in the world by 2025 making the podium fully Asian.”¹¹



ABOVE: 10 Largest Cities in Asia for Inbound Arrivals (2016, with Global Rank)

Source: Euromonitor International

Laos Tourism must jump onto this bandwagon, not only luring tourists from these large cities, but must actively pursue Chinese tourists.

Rethink China

There is a substantial demographic of Chinese tourists – many of them millennials from top tier cities - that does not fulfil the negative stereotypes and that would be attracted to Laos, if the country were marketed to them in the right way.

The record-shattering success of the Travel Frog Tabi Kaeru game app illustrates the “desire for a more passive existence among harried young people that some have termed ‘Buddhist Style’ for its desired goal of Zen-like serenity...The game’s popularity underscores the degree of pressure Chinese millennials face in a highly competitive society where stability and opportunity have become ever more elusive.”¹²

The Chinese private sector understands this. “Some Chinese and Korean tour operators are starting to promote tailor-made products based on the wants and needs of their contemporary Asian societies. These are mostly luxury trips featuring special and unique tourism experiences. With relatively short holidays, Chinese and Korean travelers will continue to prefer trips to neighboring countries, including Laos. Laos can build upon its unique qualities to engage these potential visitors, for instance through innovative Mekong River cruises and self-drive tour packages,” the writers of the CBI Value Chain Analysis¹³ note.

¹¹ Euromonitor International via <https://blog.euromonitor.com/2017/11/top-100-cities-wtm-london-2017.html>

¹² ‘Holidaying frog game finds fans among China’s harried youth’ in *Vientiane Times*, February 16, 2018 via Associated Press

¹³ Value Chain Analysis undertaken on behalf of the Centre for the Promotion of Imports from developing countries (CBI), facilitated by SwissContact, in

Differentiate – Find the unique

*Destinations need a strong, differentiated product that inspires consumers to share stories about their experiences.*¹⁴

Temples? Thailand has more. And they're usually bigger and brighter and glitzier.

Ruins? Cambodia has Angkor Wat

Elephants? Thailand has more.

Handicrafts? Vietnam has more.

Silk? It's all over Thailand and Vietnam. And it's usually shinier.

Protected areas and forests? Thailand has plenty, and you can see loads of animals there.

Mekong River boats and fishermen? 5 countries have these.

Boat racing? Much of Asia does this.

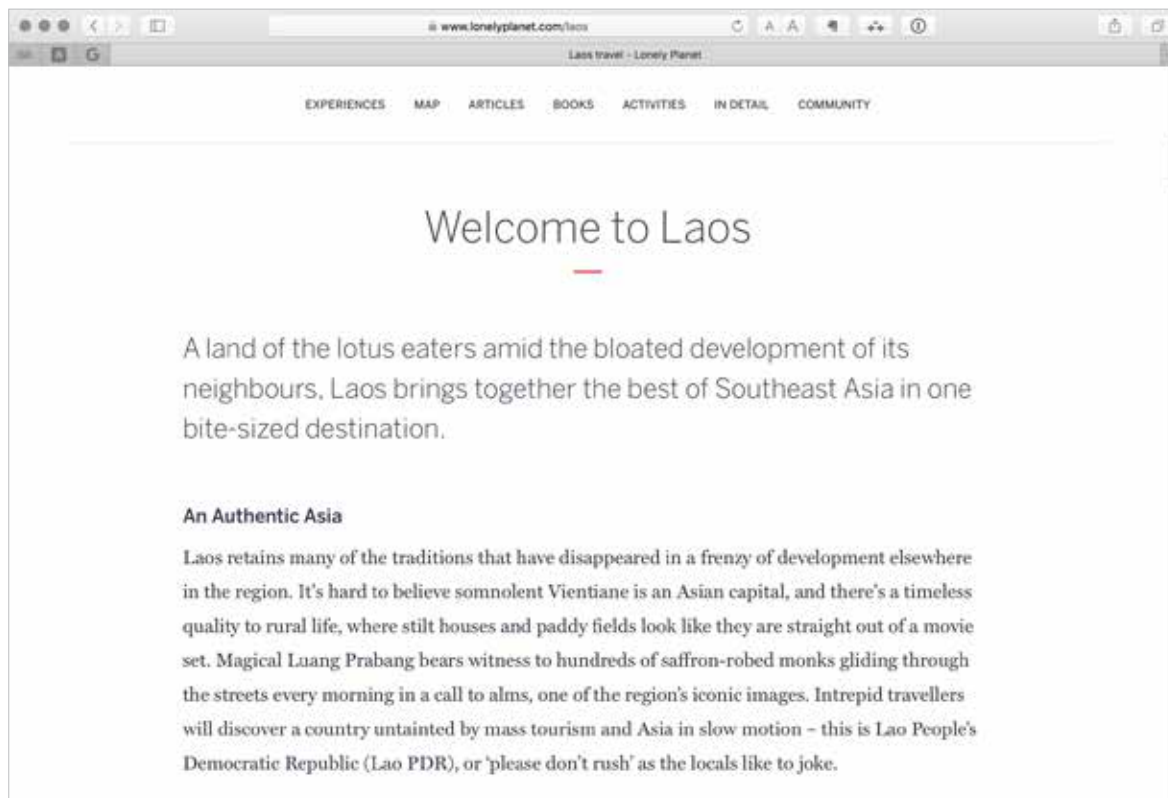
Religious festivals? Thailand has most of the same ones. With more monks. More spectacular. More people.

Food? Thailand claims it as theirs.

Flowers? Lao has the champa/frangipani. Thailand has orchids. Vietnam has lotus. Both bigger, more ornate, considered more exotic and decadent and symbolic by the international market than the champa.

Marketing campaigns filled with all the above are unlikely to encourage somebody to leave Thailand to visit Laos. Tourism Laos must be pragmatic: tourists are unlikely to be wooed from Thailand with stuff that Thailand does as well or better than Laos. In order for us to achieve the goal of becoming one of the preferred regional and global tourism destinations, we must find the Unique Selling Points (USP). We must let tourists satiate themselves in Thailand and come to Laos for something different.

One of the Unique Selling Points, already identified by leading Online Travel Agencies, guidebooks and other private-sector players financially incentivized to market Laos, is an element that so many in Laos tourism want to escape: the timeless, the 'forgotten', the sleepy, the slow... The Quiet.



THE PLAN(S) & THE MARKET POSITION: DISCOVER THE QUIET HEART

2017.

¹⁴ 'Tips for smarter digital marketing from Tourism New Zealand', *Think!*, September 9, 2016 via <https://destinationthink.com/smarter-digital-marketing/>

OF SE ASIA

This marketing strategy integrates and builds on the plans and tasks already outlined in the *Laos Destination Management Plan 2016 – 2018* (DMP), the *ASEAN Tourism Strategic Plan 2016 – 2025* and *Mekong Tourism Marketing Strategy and Action Plan 2015 – 2020*.

In fact, it is the opening two lines of the Destination Profile of the *Lao PDR Tourism Destination Management Plan 2016-2018* that frame what this marketing strategy proposes as the key marketing message for Laos:

- Lao PDR is centrally located in **the heart of the Greater Mekong Region and South East Asia**.
- It is a landlocked country bordered by Myanmar and China in the northwest, Vietnam to the east, Cambodia to the south, and Thailand to the west.

The DMP continues that “Laos tourism continues to compete with its regional competitors for ‘length of stay’ in the country. Laos is considered an add-on destination: 70% of international visitors visit other countries on their trip to Laos such as Thailand (60%), Cambodia, China or Vietnam (53%) or another South East Asian Country (18%).”

The first premise of this Tourism Marketing Strategy is that Laos’s appealing uniqueness is that it is the quiet heart of SE Asia.

- The quiet draws those with hurried lifestyles or over-stretched tourist itineraries.
- The heart not only indicates a geographic position at the very center of this appealing region, but also symbolizes love, authenticity and the life force.

The second premise, as also articulated in the DMP, is that Laos’s “geographic location and accessibility to China, which is the world’s fastest growing outbound travel market”¹⁵ is of fundamental and under-appreciated significance.

PREFERRED DESTINATION POTENTIAL

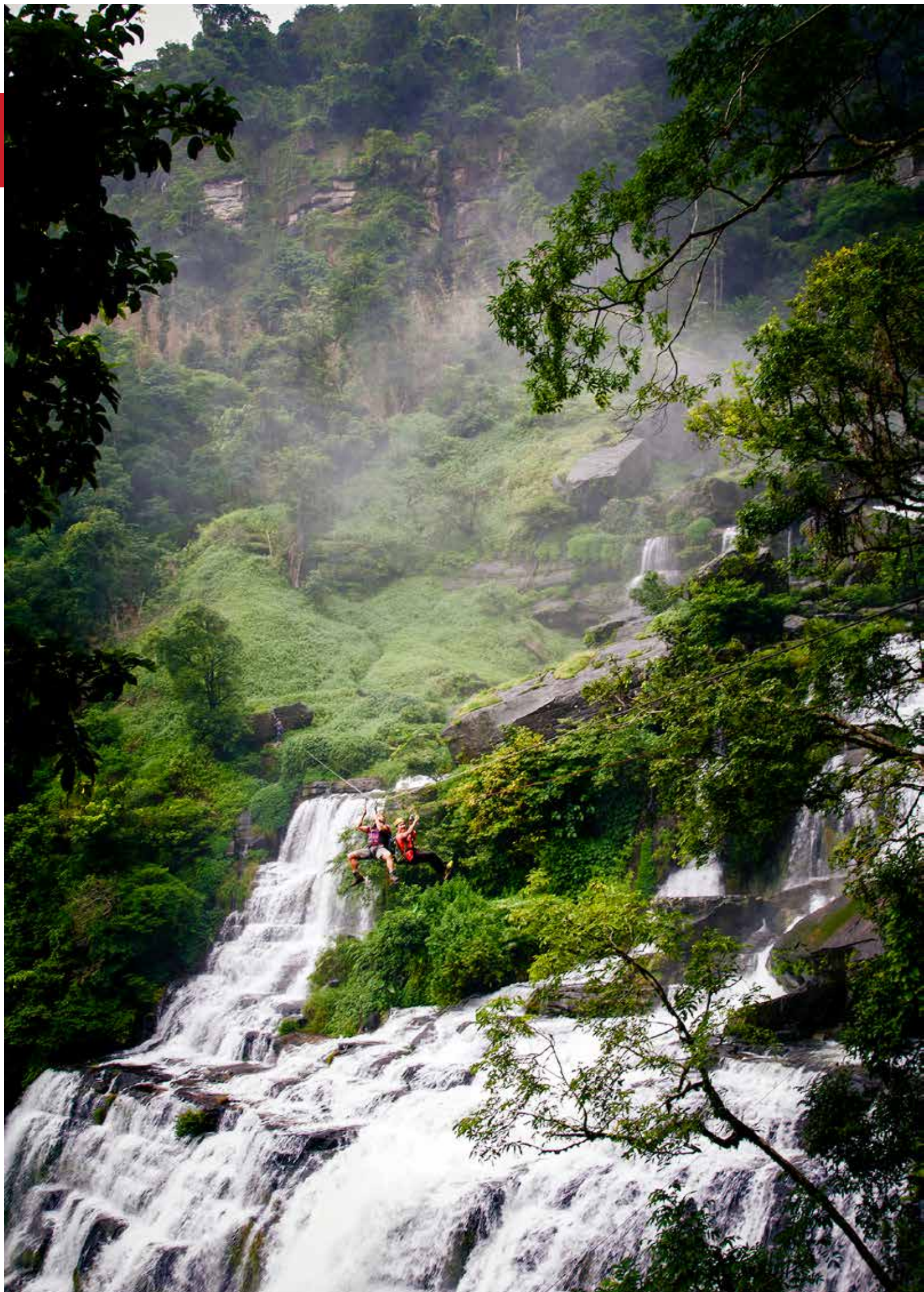
Can Laos become a “preferred regional and global tourism destination” as per the stated vision?

If all stakeholders collaborate, telling the same story, sharing the same message, amplifying the Unique Selling Points of Laos, the answer is yes. Laos does not need to outstrip Thailand in terms of visitor receipts to qualify as a preferred regional destination: Laos must simply attract a strong percentage of Thai domestic and foreign arrivals, as well as a significantly increased percentage of Chinese, especially the higher-value FITs inclined to following the regional routes outlined in the *Mekong Tourism Marketing Strategy and Action Plan 2015 – 2020*.

It is in Laos tourism’s best interests to proactively drive the creation of the “integrated spatial and thematic destination plans” and the development of “multicountry experiences” outlined in Strategic Direction 3 of the *Mekong Tourism Marketing Strategy and Action Plan 2015 – 2020*. This is not further outlined in this document, as these are tourism *development* rather than *marketing* tasks, but Laos does not need to wait for the coordinated marketing of these experiences, and can immediately begin integrating the concepts into existing marketing material and campaigns.

¹⁵ Lao PDR Tourism Destination Management Plan 2016-2018, p13





1. Market Demand

1.1 CONTEXT

1.1.1 WORLD

World Travel & Tourism Council annual research, in conjunction with Oxford Economics, shows Travel & Tourism's contribution to world GDP outpaced the global economy for the sixth consecutive year in 2016, rising to a total of 10.2% of world GDP (US\$7.6 trillion).

The sector now supports 292 million people in employment – that's 1 in 10 jobs on the planet. The outlook for the Travel & Tourism sector in 2017 remains robust and will continue to be at the forefront of wealth and employment creation in the global economy, despite the emergence of a number of challenging headwinds. Travel & Tourism forecasts over the next ten years also look extremely favorable with predicted growth rates of 3.9% annually.¹⁶

1.1.2 ASEAN TARGETS

Given that the strategic programs and projects are fully resourced and implemented, it is anticipated that by 2025¹⁷:

- The GDP contribution of ASEAN tourism could increase from 12% to 15%.
- Tourism's share of total employment could increase from 3.7% to 7%.
- Per capita spending by international tourists could increase from US\$ 877 to US\$ 1,500.
- Increase the average length of stay of international tourist arrivals from 6.3 nights to 8 nights.
- The number of accommodation units could increase from 0.51 units per 100 head of population in ASEAN to 0.60 units per 100 head of population.
- The number of awardees for the ASEAN tourism standards could increase from 86 to 300.
- The number of community-based tourism value chain project interventions could increase from 43 to over 300.

1.2 CURRENT DEMAND

| LAOS | 2017 USDm ¹ | 2017 % of total | 2018 Growth ² | USDm ¹ | 2028 % of total | Growth ³ |
|--|---------------------------|--------------------|-----------------------------|-------------------|--------------------|---------------------|
| Direct contribution to GDP | 614.0 | 4.2 | 3.8 | 962.4 | 3.5 | 4.2 |
| Total contribution to GDP | 2,012.2 | 13.7 | 4.7 | 3,373.4 | 12.2 | 4.8 |
| Direct contribution to employment ⁴ | 114 | 3.5 | -0.6 | 121 | 3.0 | 0.7 |
| Total contribution to employment ⁴ | 384 | 11.9 | 0.3 | 428 | 10.7 | 1.1 |
| Visitor exports | 748.2 | 22.5 | 1.7 | 1,013.8 | 17.2 | 2.9 |
| Domestic spending | 321.0 | 2.2 | 8.4 | 662.0 | 2.4 | 6.6 |
| Leisure spending | 880.0 | 3.3 | 3.5 | 1,360.3 | 2.7 | 4.1 |
| Business spending | 189.2 | 0.7 | 5.1 | 315.5 | 0.7 | 4.7 |
| Capital investment | 555.7 | 10.5 | 5.7 | 1,011.9 | 10.0 | 5.6 |

¹2017 constant prices & exchange rates; ²2018 real growth adjusted for inflation (%); ³2018-2028 annualised real growth adjusted for inflation (%); ⁴'000 jobs

¹⁶ World Travel & Tourism Council: <https://www.wttc.org/research/economic-research/economic-impact-analysis/>

¹⁷ ASEAN Tourism Strategic Plan 2016-2025, pix

| SOUTHEAST ASIA | 2017 USDbn ¹ | 2017 % of total | 2018 Growth ² | USDbn ¹ | 2028 % of total | Growth ² |
|--|----------------------------|--------------------|-----------------------------|--------------------|--------------------|---------------------|
| Direct contribution to GDP | 135.8 | 4.9 | 5.9 | 245.5 | 5.2 | 5.5 |
| Total contribution to GDP | 329.5 | 12.0 | 5.8 | 598.3 | 13.0 | 5.5 |
| Direct contribution to employment ⁴ | 14,457 | 4.7 | 3.3 | 20,037 | 5.6 | 3.0 |
| Total contribution to employment ⁴ | 36,309 | 11.8 | 3.3 | 49,516 | 13.7 | 2.8 |
| Visitor exports | 135.6 | 8.3 | 6.0 | 243.2 | 9.5 | 5.4 |
| Domestic spending | 119.3 | 4.3 | 5.9 | 207.8 | 4.8 | 5.1 |
| Leisure spending | 184.9 | 3.6 | 6.5 | 335.5 | 3.8 | 5.5 |
| Business spending | 70.0 | 1.3 | 4.6 | 115.5 | 1.3 | 4.7 |
| Capital investment | 48.8 | 6.4 | 5.4 | 86.8 | 6.4 | 5.4 |

¹2017 constant prices & exchange rates; ²2018 real growth adjusted for inflation (%); ³2018-2028 annualised real growth adjusted for inflation (%); ⁴'000 jobs

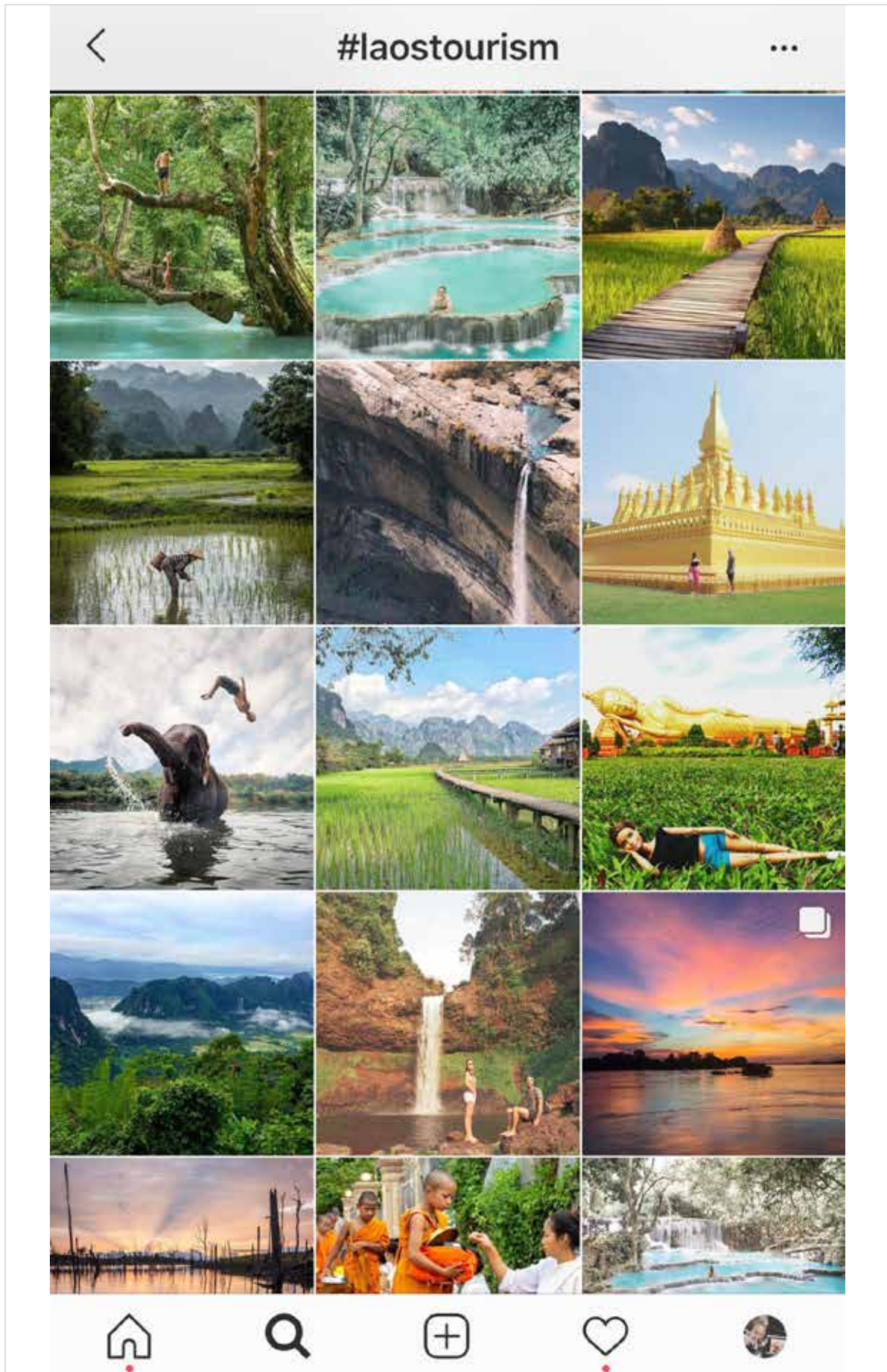
Source: World Travel and Tourism Council: Travel & Tourism Economic Impact 2018 - March 2018. All rights reserved.

1.3 PROJECTED DEMAND

According to the World Travel and Tourism Council:¹⁸

- The direct contribution of Travel & Tourism to GDP is expected to grow by 4.2% pa to LAK8,018bn (3.5% of GDP) by 2028.
- Visitor exports are a key component of the direct contribution of Travel & Tourism. In 2017, Laos generated LAK6,233.5bn in visitor exports. In 2018, this is expected to grow by 1.7%, and the country is expected to attract 3,367,000 international tourist arrivals.
- By 2028, international tourist arrivals are forecast to total 5,149,000, generating expenditure of LAK8,446.8bn, an increase of 2.9% pa.
- By 2028, Travel & Tourism will account for 121,000 jobs directly, an increase of 0.7% pa over the next ten years.

¹⁸ Travel & Tourism Economic Impact 2018 Laos by World Travel & Tourism Council





2. Critical Issues and Opportunities

2.1 ISSUES

2.1.1 LIMITED INTERNAL CAPACITY

- Ministries are staffed by often driven, passionate, well-intentioned people who, having grown up in a small country with its own unique and not-widely-spoken language, are at the disadvantage of not being fully exposed to the international tourist market's mindsets, attitudes and stresses.
- Low levels of English, the primary language of international business and tourism, are spoken in both the public and private sectors.

2.1.2. HIGH COMPETITION

- Surrounding countries offer most of what Lao offers – but often in bigger and shinier versions. Laos has Wat Phou. Thailand has Ayutthaya. Cambodia has Angkor. Myanmar has Bagan. This can be compared to taking a dove to a cock-fight.

2.1.3. SURROUNDED BY EXTREMELY STRONG TOURISM BRANDS

Asia has experienced successful years, with growth in tourist receipts and D2 © searches amongst a clear majority of its nations. Thailand has soared through the Global Ranking, with other nations such as China and Hong Kong remaining in the top 10. These countries are followed closely by Macao, Singapore, and Japan, who are 11th, 12th and 13th respectively. Ten of the top 25 nations in our ranking are from the Asian continent, a figure tied to that of Europe, and a long way ahead of the Americas.

Putting Thailand aside, we can witness the ever-growing competitiveness of the Asian Market as a whole by looking at nations beyond the Asian top ten. An improved CBS Rating © coupled with an advancing social media score means

Indonesia are becoming ever closer to featuring in the Asian top ten for the first time. It moves up 1 position to claim 11th - the position previously held by the United Arab Emirates.

Vietnam rises a further two positions to 15th regionally, yet rockets a fantastic 10 positions in the Global Ranking to 47th...

It is clear to see in this year's ranking that Asia is reducing the gap respect Europe, aiming to become the world's biggest market for tourism. It is the continent with the highest growth rate in the tourism industry in terms of D2 © and tourism receipts.¹⁹

2.2 OPPORTUNITIES

2.2.1. GLOBAL POLITICAL CLIMATE HAS CHANGED

- Fears of mass attacks - while *Lao PDR Tourism Destination Management Plan 2016-2018* lists "Increasing rate of global terrorism" as a threat, this is, in reality, an opportunity for Laos, which is neither a source or target of terrorists.

2.2.2. REGIONAL POLITICAL CLIMATE HAS CHANGED

- Myanmar – The country's tourism bookings are slowing after international condemnation of 'ethnic cleansing' in the country's Rakhine State.

¹⁹ Bloom Consulting's Country Brand Ranking © 2017 Tourism Edition, p31

- Cambodia – Suppression of opposition parties and particularly English-speaking media can make international tourists cautious.

2.2.3. GLOBAL ENVIRONMENTAL CHANGES, GLOBAL WARMING

- Droughts and other climate changes brought on by global warming are causing damage to some strong existing tourism destinations. For example, Cape Town, South Africa, repeatedly voted by the UK public as the most beautiful city in the world, now faces such a water shortage that tourists are relatively unwelcome. And few tourists would want to visit when they might have to stand in line for water for hours each day, bucket in hand.

2.2.4. TECHNOLOGICAL DEVELOPMENT

- The tourist trail is more scattered – tourists can go “off the beaten track” more confidently because of the navigation and communication aids their cell phones provide
- People’s downtime is online. We can catch them while they’re dreaming.
- Economic instability, e.g. the recent volatility of the US dollar and trade sanctions lead to work stress. People are burned out and exhausted. Laos can offer them a place to rest and recharge.
- Technology provides means to speak to niche audiences - such as cyclists, handicraft lovers, foodies or yoga enthusiasts – directly.

2.2.5 HIGH TOURISM RECEIPTS IN REGION

Travel & Tourism growth (3.1%) outpaced that of the global economy in 2016 (2.5%), “showing the sector’s resilience, and the eagerness of people to continue to travel and discover new places, despite economic and political challenges across the world,” according to the WTTC’s David Scowsill.²⁰



Infographic source: *Travel & Tourism: Economic Impact 2017* by Oxford Economics for World Travel & Tourism Council

Of all regions, SE Asia shows the strongest growth (8.3%) with its 11.8% contribution to GDP only surpassed by Caribbean (14.9%) and Oceania (12.2%).²¹

²⁰ *Travel & Tourism: Economic Impact 2017* by Oxford Economics for World Travel & Tourism Council

²¹ *Travel & Tourism: Economic Impact 2017* by Oxford Economics for World Travel & Tourism Council



Infographic source: Travel & Tourism: Economic Impact 2017 by Oxford Economics for World Travel & Tourism Council

In receipts, the US and Spain remain at the top, followed by Thailand, which climbed to number 3 last year, and China, which is fourth.²²

Can Laos piggy-back off the success of neighbor Thailand?

In 2016, four countries moved up in the Top 10 ranking by international tourism receipts and three in the ranking by international tourist arrivals (overnight visitors). Most notably, Thailand climbed further, up to 3rd place from 5th in terms of tourism receipts in its second year of double-digit growth, hitting the US\$ 50 billion mark in 2016. It also moved up one place in arrivals to 9th position (33 million).²³

| International tourist arrivals | | | | | | International tourism receipts | | | | | | | | |
|--------------------------------|----------------|-----------|-------|------------|--------|--------------------------------|------|-------------------|-------|--------|------------------|--------|------|------|
| Rank | Series | (million) | | Change (%) | | Rank | US\$ | | | | Local currencies | | | |
| | | 2015 | 2016* | 15/14 | 16*/15 | | 2015 | 2016* | 15/14 | 16*/15 | 15/14 | 16*/15 | | |
| 1 | France | TF | 84.5 | 82.6 | 0.9 | -2.2 | 1 | United States | 205.4 | 205.9 | 7.0 | 0.3 | 7.0 | 0.3 |
| 2 | United States | TF | 77.5 | 75.6 | 3.3 | -2.4 | 2 | Spain | 56.5 | 60.3 | -13.3 | 6.9 | 3.8 | 7.1 |
| 3 | Spain | TF | 68.5 | 75.6 | 5.5 | 10.3 | 3 | Thailand | 44.9 | 49.9 | 16.9 | 11.0 | 23.0 | 14.7 |
| 4 | China | TF | 56.9 | 59.3 | 2.3 | 4.2 | 4 | China | 45.0 | 44.4 | 2.1 | -1.2 | 3.6 | 5.3 |
| 5 | Italy | TF | 50.7 | 52.4 | 4.4 | 3.2 | 5 | France | 44.9 | 42.5 | -22.9 | -5.3 | -7.6 | -5.1 |
| 6 | United Kingdom | TF | 34.4 | 35.8 | 5.6 | 4.0 | 6 | Italy | 39.4 | 40.2 | -13.3 | 2.0 | 3.8 | 2.3 |
| 7 | Germany | TCE | 35.0 | 35.6 | 6.0 | 1.7 | 7 | United Kingdom | 45.5 | 39.6 | -2.3 | -12.9 | 5.2 | -1.4 |
| 8 | Mexico | TF | 32.1 | 35.0 | 9.4 | 8.8 | 8 | Germany | 36.9 | 37.4 | -14.8 | 1.4 | 2.0 | 1.7 |
| 9 | Thailand | TF | 29.9 | 32.6 | 20.6 | 8.9 | 9 | Hong Kong (China) | 36.2 | 32.9 | -5.8 | -9.1 | -5.8 | -9.0 |
| 10 | Turkey | TF | 39.5 | .. | -0.8 | .. | 10 | Australia | 28.9 | 32.4 | -8.2 | 12.3 | 10.2 | 13.5 |

Source: UNWTO

Asia and the Pacific recorded 308 million international tourist arrivals in 2016, an increase of 9%, or 24 million more than in 2015, the highest increase in both relative and absolute terms across the five UNWTO regions. International tourism receipts increased 5% in real terms to US\$ 367 billion, US\$ 17 billion more than in 2015. Asia and the Pacific accounted for 25% of the world's arrivals and 30% of the world's receipts. All four subregions enjoyed strong results in 2016. Growing purchasing power in emerging economy markets, increased air connectivity, more affordable travel and a relaxation of visa requirements continue to fuel tourism demand from within and outside the region...

In South-East Asia (+9%), results were driven by top destination Thailand (+9%), which enjoyed a second year of strong growth, and Vietnam (+26%). Archipelago destinations Indonesia (+15%) and the Philippines (+11%) also reported double-digit growth in 2016 after similarly strong results a year earlier. International arrivals in Singapore were 7% higher, while Cambodia reported 5% growth and Malaysia 4%.²⁴

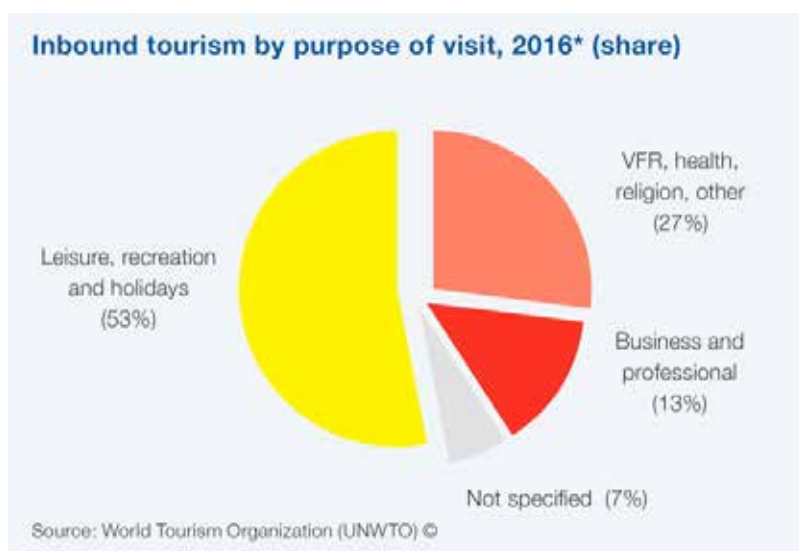
22 UNWTO Highlights 2017, p3

23 UNWTO Tourism Highlights 2017 Edition, p6

24 UNWTO Tourism Highlights 2017 Edition, p7

| Destinations | International tourist arrivals | International tourism receipts | | | | | | | | | | | | |
|-----------------|--------------------------------|--------------------------------|-----------|----------------|-----------|-------|-------|--------|--------|---------|---------|---------|--------|-------|
| | (1000) | Change (%) | Share (%) | (US\$ million) | Share (%) | | | | | | | | | |
| | Series | 2010 | 2014 | 2015 | 2016* | 14/13 | 15/14 | 16*/15 | 2016* | 2010 | 2014 | 2015 | 2016* | 2016* |
| South-East Asia | 70,473 | 97,036 | 104,242 | 113,231 | 2.9 | 7.4 | 8.6 | 36.7 | 68,547 | 108,169 | 108,457 | 117,189 | 32.0 | |
| Brunei | TF | 214 | 201 | 218 | 219 | -10.6 | 8.6 | 0.3 | 0.1 | .. | 79 | 140 | .. | .. |
| Cambodia | TF | 2,508 | 4,503 | 4,775 | 5,012 | 7.0 | 6.1 | 5.0 | 1.6 | 1,519 | 2,953 | 3,130 | 3,207 | 0.9 |
| Indonesia | VF/TF | 7,003 | 9,435 | 9,963 | .. | 7.2 | 5.6 | .. | .. | 6,958 | 10,261 | 10,761 | 11,349 | 3.1 |
| Laos | TF | 1,670 | 3,164 | 3,543 | 3,315 | 17.2 | 12.0 | -6.4 | 1.1 | 382 | 642 | 581 | 540 | 0.1 |
| Malaysia | TF | 24,577 | 27,437 | 25,721 | 26,757 | 6.7 | -6.3 | 4.0 | 8.7 | 18,115 | 22,595 | 17,584 | 18,074 | 4.9 |
| Myanmar | TF | 792 | 3,081 | 4,681 | .. | 50.7 | 51.9 | .. | .. | 72 | 1,613 | 2,101 | 2,177 | 0.6 |
| Philippines | TF | 3,520 | 4,833 | 5,361 | 5,967 | 3.2 | 10.9 | 11.3 | 1.9 | 2,645 | 5,030 | 5,272 | 5,139 | 1.4 |
| Singapore | TF | 9,161 | 11,864 | 12,052 | 12,913 | -0.3 | 1.6 | 7.1 | 4.2 | 14,178 | 19,134 | 16,563 | 18,386 | 5.0 |
| Thailand | TF | 15,936 | 24,810 | 29,923 | 32,588 | -6.5 | 20.6 | 8.9 | 10.6 | 20,104 | 38,418 | 44,922 | 49,871 | 13.6 |
| Timor-Leste | TF | 40 | 60 | 61 | 72 | -24.3 | 2.0 | 17.4 | 0.0 | 31 | 35 | 51 | 58 | 0.0 |
| Vietnam | VF | 5,050 | 7,960 | 7,944 | 10,013 | 5.1 | -0.2 | 26.0 | 3.2 | 4,450 | 7,410 | 7,350 | 8,250 | 2.2 |

2.2.6. UNTARGETED MARKET SEGMENTS



Travel for holidays, recreation and other forms of leisure accounted for just over half of all international tourist arrivals in 2016 (53% or 657 million). Some 13% of all international tourists reported travelling for business and professional purposes, and another 27% travelled for other reasons such as visiting friends and relatives (VFR), religious reasons and pilgrimages, health treatment, etc. The purpose of visit for the remaining 7% of arrivals was not specified.²⁵

Laos has substantial strengths that would appeal to the VFR, health and religion category:

- The Lao diaspora millennials are curious about the modern Laos and eager to visit. Itineraries and marketing should target them directly.
- Health and wellness are key drivers of destination decision-making. Laos will attract this substantial audience by marketing itself as a place of rest, recuperation and rejuvenation. Itineraries and marketing should include focus on places of quiet for meditation, yoga, etc.
- Buddhists from around the world must be directly encouraged to visit the lesser-known religious sites of Laos.

²⁵ UNWTO Tourism Highlights 2017 Edition, p4

2.2.7. UNIQUENESS: WE'VE GOT OLDER STUFF – CELEBRATE THE PEOPLE BEFORE US

Archaeological discoveries in Laos have made contributions to our understanding of the earliest humans in the eastern hemisphere, as well as human behavior during the later Pleistocene. The country is strategically located for investigating the transition from foragers to farmers...²⁶

Laos Tourism must highlight the things that are different:

- Wat Phou is less impressive but predates Angkor. Marketing must highlight this. Encourage tourists to visit the place where the king of Angkor went on pilgrimage.
- Wat Phou is much smaller but much older than Ayutthaya
- The stories of Hintang Archeological Park, the archaeological finds at Sepon, and the Plain of Jars must all be interwoven into national marketing to illustrate the ancient heritage of Laos, “the place where time has stood still.”



26 Marwick B., Bouasisengpaseuth B. (2017) 'The History and Practice of Archaeology in Laos'. In: Habu J., Lape P., Olsen J. (eds) *Handbook of East and Southeast Asian Archaeology*. Springer, New York, NY



3. Priority International Markets

3.1 WHERE ARE THEY FROM?

Note: Unless otherwise credited, tourism arrivals and revenue figures cited are those provided by MICT Tourism Development Department.²⁷ TripAdvisor figures were supplied directly by TripAdvisor.²⁸

3.1.1 DIRECT NEIGHBORS

3.1.1.1 Thailand

At 2,009,605 tourist arrivals, Thailand constituted 47.41% of tourist arrivals in 2016, providing 31.4% of all TripAdvisor views of Laos in 2016.

Of all global IPs looking at Mekong countries on TripAdvisor, 67% are from Thailand, indicating substantial regional decision-making by both Thais and internationals while in Thailand (split ratio unknown) emanating from that country. This motivates for strong marketing of Laos in Thailand to both Thai residents and international travelers making next-stop decisions.

Of all IPs looking specifically at Laos on TripAdvisor, 18% are from Thailand.

Thai viewing of Laos on TripAdvisor in 2016 showed a 14.8% increase over 2015.

3.1.1.2 Vietnam

At 998,400 tourist arrivals, Vietnam constituted 23.55% of tourist arrivals in 2016, providing 7.9% of all TripAdvisor views of Laos in 2016.

Of all global IPs looking at Mekong countries on TripAdvisor, 22% are from Vietnam, indicating relatively high levels of regional decision-making by both Vietnamese and internationals while in Vietnam (split ratio unknown) emanating from that country. This motivates for increased marketing of Laos in Vietnam to both Vietnamese residents and international travelers making next-stop decisions.

Vietnamese viewing of Laos on TripAdvisor in 2016 showed an 8.8% increase over 2015.

3.1.1.3 China

New data from Ctrip is illustrating how rapidly Chinese travel is changing. The two most obvious trends illustrated in the report is the rising importance of independent travel and the growth of lower-tier cities as tourism source markets. 2017 was also the year China became the world's largest tourism source market with 129 million outbound trips...

Of particular note is how Ctrip users in 2017 were almost evenly divided between group and independent travel. Free independent travelers (FITs) tend to utilize online resources to independently plan and book trips...

Growth in spending power and global connectivity in lower-tier Chinese cities has set the stage for a new wave of Chinese travelers. With little travel experience and often without English or other foreign language skills, group tours often prove to be a more attractive, "safer" option for these newer travelers.²⁹

At 545 493 tourist arrivals, China constituted 12.87% of tourist arrivals in 2016 and provided 6.3% of all TripAdvisor views of Laos in 2016.

While this neighboring country is Laos's third biggest provider of tourist arrivals, it has enormous potential for growth even

²⁷ *Statistical Report on Tourism in Laos 2016*, Ministry of Information, Culture and Tourism, Tourism Development Department, Tourism Research Division

²⁸ *Laos Tourism and TripAdvisor*, Strategic Partnership Proposal 2018-2022

²⁹ "How Chinese Travel Changed in 2017 According to Ctrip" in Jing Travel, February 12, 2018. Retrieved from <https://jingtravel.com/how-chinese-travel-changed-in-2017-according-to-ctrip/>.

pre the planned 2021 opening of the high-speed rail link. Chinese viewing of Laos on TripAdvisor in 2016 showed a dramatic 19.1% drop over 2015, possibly linked to Thai crackdowns on dubious tour operators there.

Growth in arrivals from China went from 6% in 2013, up to 10.16% and 10.92 in the next two years and further increased to 12.87% in 2016. But there is enormous potential and Laos should be targeting this market energetically and proactively.

*China is projected to be the largest outbound travel market by 2021, (excluding trips to Hong Kong and Macau). At a projected 103.4 million trips in 2021, outbound China travel will be four to five times that of South Korea and India, and will constitute almost 40 percent of all Asia Pacific outbound travel by 2021.*³⁰

The Lao tourism industry must very quickly change its beliefs on who the Chinese tourist is and what they want: “Increasingly, China’s travelers are taking their families — and their money — to less conventional locales,” according to a CNBC article citing data from travels booking platform Trivago.³¹

“Four of the five most popular international destinations among Chinese tourists during the eight-day [October 2017] holiday were located in Asia, according to travel bookings platform Trivago. Those locations included Hong Kong, Tokyo, Osaka and Bangkok, with Paris the lone European city in the top five. Besides those mainstays, mainland tourists bitten by the travel bug are also increasingly adventurous. Some are looking farther afield for their next vacation and others eschewing the traditional package tours in favor of self-planned trips.”

In addition to Thailand being one of the top five destinations, Vietnam and Cambodia both showed more than 50% increase in Chinese tourist bookings in 2017.

Accompanying the growing desire to visit those destinations is the increased demand for more personalized holiday experiences, market research shows. Tailor-made travel services are fast becoming customary among wealthy travelers looking to escape cookie-cutter vacation packages. According to Ctrip, factors that more Chinese tourists are seeking out from their holidays include “avoiding big crowds,” “no shopping” and private travel guides.

When travelers visit places others haven’t, they can derive “social cachet,” and that’s become a trend among the middle class, according to Ben Cavender, a principal at consultancy China Market Research Group.

“Increasingly, we are seeing well-heeled Chinese travel to hard-to-reach destinations for the bragging rights and WeChat pictures [to] show they’ve been somewhere exotic,” he said.

More than 70 percent of Chinese tourists traveling abroad will visit other Asian countries this year, according to Ctrip. Of those Asia-bound travelers, 45 percent will head to countries in Southeast Asia, with Thailand proving the most popular destination in that region, a Ctrip spokesman told CNBC.

“We see that Chinese travelers are spending more and more,” Trivago CEO Rolf Schromgens told CNBC’s “Squawk Box”... Chinese tourist expenditure on hotel rooms has increased 23 percent compared to the year before, he added.

Key lessons:

1. Regional preference
3. Increasingly adventurous
4. Increasing demand for more personalized, tailor-made tours and itineraries
5. A substantial and growing sector of Chinese tourists is focused on avoiding crowds and shopping
6. The Chinese millennial, in particular, is looking for “bragging rights” – they want to show on social media that they were in exotic or difficult-to-reach places.

3.1.1.4 Cambodia

At 16,536 tourist arrivals, Cambodia constituted 0.39% of tourist arrivals in 2016, providing 3,6% of all TripAdvisor views of Laos in 2016.

Cambodian viewing of Laos on TripAdvisor in 2016 showed little movement over 2015, at 0.7%.

³⁰ Mastercard *Future of Outbound Travel in Asia Pacific (2016-2021)* Report

³¹ “Chinese tourists are finding new favorites from their trips – and their money” in CNBC, Oct 11, 2017. Retrieved from <https://www.cnbc.com/2017/10/11/china-travel-tourists-embrace-less-conventional-locations-and-tailor-made-trips.html>

3.1.2 REGION

3.1.2.1 South Korea

At 173,260 tourist arrivals, South Korea constituted 4.09% of tourist arrivals in 2016, providing 5.1% of all TripAdvisor views of Laos in 2016.

South Korea is projected to be the second largest outbound travel market by 2021.³²

South Korean viewing of Laos on TripAdvisor in 2016 showed a dramatic 23.1% drop over 2015.

3.1.2.2 Malaysia

At 24,391 tourist arrivals, Malaysia constituted 0.58% of tourist arrivals in 2016, providing 5.1% of all TripAdvisor views of Laos in 2016.

Malaysia viewing of Laos on TripAdvisor in 2016 showed a dramatic 22.1% increase over 2015.

3.1.2.3 Singapore

At 8,512 tourist arrivals, Singapore constituted 0.2% of tourist arrivals in 2016, providing 6.2% of all TripAdvisor views of Laos in 2016. This perhaps indicates that 31 times more Singapore potential travelers were interested in visiting Laos than actually arrived.

Singaporean viewing of Laos on TripAdvisor in 2016 showed a dramatic 31.4% increase over 2015.

3.1.3 LONG-HAUL

3.1.3.1 United States

At 58,094 tourist arrivals, the U.S. constituted 1.37% of tourist arrivals in 2016, providing 18.6% of all TripAdvisor views of Laos in 2016. This perhaps indicates that at least 13 times more U.S. potential travelers were interested in visiting Laos than actually arrived.

U.S. viewing of Laos on TripAdvisor in 2016 showed a dramatic 20% increase over 2015.

VFR potential: In 2008, 240,532 Lao people in USA. One only has to read the comments at the end of the Secrets of Nature documentary *Laos Wonderland* to get a sense of the Lao diaspora's yearning to visit.

3.1.3.2 France

At 54,953 tourist arrivals, France constituted 1.3% of tourist arrivals in 2016, providing 9.1% of all TripAdvisor views of Laos in 2016. This perhaps indicates that at least 7 times more French potential travelers were interested in visiting Laos than actually arrived.

French viewing of Laos on TripAdvisor in 2016 showed a 5.8% increase over 2015.

VFR potential: In 2011, there were 140,000 Laotian French in France.

3.1.3.3 Japan

At 49,191 tourist arrivals, Japan constituted 1.16% of tourist arrivals in 2016, providing 7.9% of all TripAdvisor views of Laos in 2016. This perhaps indicates that at least 7 times more Japanese potential travelers were interested in visiting Laos than actually arrived.

Japanese viewing of Laos on TripAdvisor in 2016 showed a 13.3% increase over 2015.

3.1.3.4 United Kingdom

At 39,170 tourist arrivals, the UK constituted 0.92% of tourist arrivals in 2016, providing 11.2% of all TripAdvisor views of Laos in 2016. This perhaps indicates that at least 12 times more U.K. potential travelers were interested in visiting Laos than actually arrived.

UK viewing of Laos on TripAdvisor in 2016 showed a 3.2% decrease over 2015.

³² Mastercard *Future of Outbound Travel in Asia Pacific (2016-2021)* Report

3.1.3.5 Germany

At 34,018 tourist arrivals, Germany constituted 0.8% of tourist arrivals in 2016, providing 7.2% of all TripAdvisor views of Laos in 2016. This perhaps indicates that at least 9 times more German potential travelers were interested in visiting Laos than actually arrived.

German viewing of Laos on TripAdvisor in 2016 showed a 12.4% increase over 2015.

3.1.3.6 Australia

At 33,077 tourist arrivals, Australia constituted 0.78% of tourist arrivals in 2016, providing 12.1% of all TripAdvisor views of Laos in 2016. This perhaps indicates that at least 15 times more Australian potential travelers were interested in visiting Laos than actually arrived.

Australia viewing of Laos on TripAdvisor in 2016 showed a 2.1% decrease over 2015.

3.1.3.7 Canada

At 19,315 tourist arrivals, Canada constituted 0.46% of tourist arrivals in 2016, providing 4.4% of all TripAdvisor views of Laos in 2016.

Canadian viewing of Laos on TripAdvisor in 2016 showed an 8% increase over 2015.

VFR potential: 22,090 Lao people in Canada in 2011.

3.1.3.8 Switzerland

At 10,603 tourist arrivals, Switzerland constituted 0.25% of tourist arrivals in 2016, providing 2.5% of all TripAdvisor views of Laos in 2016.

Swiss viewing of Laos on TripAdvisor in 2016 showed a 5.3% increase over 2015.

3.1.3.9 Italy

At 10,052 tourist arrivals, Italy constituted 0.24% of tourist arrivals in 2016, providing 3.6% of all TripAdvisor views of Laos in 2016.

Italian viewing of Laos on TripAdvisor in 2016 showed a negligible drop of 0.4% from 2015.

3.1.3.10 India

At 8,249 tourist arrivals, India constituted 0.19% of tourist arrivals in 2016, providing 2.5% of all TripAdvisor views of Laos in 2016.

India is projected to be the second largest outbound travel market by 2021.³³

Indian viewing of Laos on TripAdvisor in 2016 showed a 19.2% increase over 2015.

3.1.3.11 The Netherlands

At 7,000 tourist arrivals, The Netherlands constituted 0.17% of tourist arrivals in 2016, providing 2.9% of all TripAdvisor views of Laos in 2016.

Dutch viewing of Laos on TripAdvisor in 2016 showed a 22.5% increase over 2015.

3.1.3.12 Spain

At 2,009,605 tourist arrivals, Spain constituted 0.13% of tourist arrivals in 2016, providing 2.1% of all TripAdvisor views of Laos in 2016.

Spanish viewing of Laos on TripAdvisor in 2016 showed a slight 2.4% increase over 2015.

33 Mastercard *Future of Outbound Travel in Asia Pacific (2016-2021)* Report

3.2 WHO ARE THEY? WHAT DO WE SAY TO THEM?

Through multiple tourism stakeholder meetings during 2016-2017³⁴ the following Primary and Secondary audiences proposed by Quo, a Bangkok-based hospitality brand strategy agency, were discussed and agreed: ³⁵

TARGET AUDIENCE SUMMARY



And the accompanying concept statement outlines what we say to them:

34 National Branding Workshop on 30 September 2016 at SwissContact Offices, National Branding Workshop on 21 February 2017 at SwissContact Offices, Lao Tourism Marketing Taskforce Meeting on 11 April 2017 at MICT, Workshop on Laos Tourism Branding on 9 May 2017 at Muong Thanh Luxury Vientiane Hotel, Laos Marketing Strategy meeting on 30 June 2017 at SwissContact offices, Tourism Marketing Taskforce meeting on 15 November 2017 at MICT.

35 *Laos Brand Strategy & Culture v3* 'Target Audience Summary' by QUO, p30, in which Quo notes that "The primary and secondary target audiences are intended to be aspirational. In the branding process, it is important to not only understand today's traveler but also consider what the ideal traveler might be."

CONCEPT STATEMENT

Curious and enchanting, Laos is a destination unlike any other; a land of untouched wonder and rare beauty, where time loses meaning and simplicity prevails.





Rich in history, traditions, diverse landscapes and cultures, Laos captivates the inner explorer, urging them to journey further and deeper into the 'unknown'. From the rolling mountains of the north to the river islands of the south, the country embraces with its uniquely laidback lifestyle and the heartfelt generosity of its people.

Regardless of travel pace and purpose, the Laos experience never fails to satisfy one's curiosity - and delivers so much more.

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This is further described in Quo's Brand Strategy document as the "Cultural Traits":

CULTURAL TRAITS

| UNTOUCHED BEAUTY | REWARDING JOURNEYS | UNIQUELY LAIDBACK | GENUINE KINSHIP |
|---|---|--|---|
|  |  |  |  |

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BENEFITS

- **Curiosity as a motivator.** Maintain and leverage Laos' "untouched" appeal. Motivate potential visitors to find out more about Laos by tapping into their curiosity and trigger wanderlust.
- **Filled with wonder.** Excite travelers to proactively seek out what Laos has to offer by striking a balance between surprise, beauty, the unfamiliar and desire.
- **Rarity.** Embrace Laos' position as one of those rare destinations largely untouched by rapid globalization – not because it is stuck in the past, but because it is respectful and mindful of preserving a way of life.

PERSONALITY

Inspiring
Enchanting
Elegant
Intriguing



BENEFITS

- **Enrichment and fulfillment.** For those willing to embrace the unknown, Laos rewards with deeply personal memories to last a lifetime. The further and deeper one explores Laos, the more enriching their experience can be.
- **Diversity of experiences.** Laos answers traveller's wanderlust with an array of cultural attractions, landscapes and abundant biodiversity across the country..
- **Captivating charm.** There is a charm about Laos, one that is similar yet significantly different from its regional neighbours. It captivates all who visit, and entices them to stay longer.

PERSONALITY

Charming
Captivating
Serene
Happy



UNIQUELY LAIDBACK

Laos' serenity and tranquility is more than a 'vibe' or a 'feel' – it's a hallmark of the travel experience.

BENEFITS

- **"To Just Be"**. Whether in a populated town or the countryside, travellers have the opportunity to slow down, live in the moment, reflect on and be grateful for all life has to offer – a rarity in today's day and age.
- **Ultimate sense of freedom at your own pace**. Laos never seeks to impose itself on those who visit. As a country and people, Laos allows travellers to experience all it has to offer, at their own pace.
- **Richness to the travel experience**. Travelling and experiencing Laos at a languid pace adds richness to the experience, allowing travellers time and space to see things in greater detail.

PERSONALITY

Relaxed
Easy-going
Calm
Welcoming



GENUINE KINSHIP

Collective spirit defined by harmony, kindness and sincerity – one all visitors are welcome to be part of.

BENEFITS

- **Deep roots**. Laos' incredibly hospitable nature is deeply ingrained in its cultural and social fabric.
- **Community spirit**. The sense of kinship within the Lao community is often extended to visitors in various forms, from simple navigational help to invitations to family meals or social celebrations.
- **Learning and sharing**. While engaging with visitors allow Lao people to learn more about the world, it is also an opportunity for Lao people to enlighten visitors on their way of life. Laos transports visitors into a simpler way of living, and immediately makes them feel part of it.

PERSONALITY

Engaging
Heartfelt
Friendly
Eager

The sections below outline what that looks like for each target market.

3.2.1 PRIMARY TARGET MARKETS

“The selected primary typologies are not significantly different from the average Laos traveler today. However, it is important to understand what motivates them and continue to target, engage and communicate with them the right way,” Quo notes.

3.2.1.1 Active

Seeking to enjoy outdoor leisure and recreational activities of interest.



Note the word *leisure*: this is not necessarily about high adrenalin or adventure. This target market does include people very enthusiastic about specific sports (e.g. cycling, running, hiking, rock climbing, kayaking) – and these should be targeted with specific sports events and tours, which are still significantly lacking in Laos – but the bulk of this category are people who want to relax and get away from their work stresses and indoor lifestyles by being slightly active in the sunshine and fresh air.

Rather than exercise indoors in a gym as they might do in their home country, this type of traveler would enjoy aerobics on the Mekong Riverfront at sunset. And though Vang Vieng’s tubing in the past developed a bad reputation, for the bulk of participants it is the outdoor leisure and slight activity of drifting lazily that is the drawcard (though the recreational activities of drinking and debauchery also certainly contributed to the numbers in the past). This market

is far bigger than that of serious kayakers looking for high action and adrenalin.

And it is not necessarily all outdoors. *Recreational activities* include cooking, handicraft-making, photography, meditation, etc.

MARKET POSITIONING: LAOS’S USP & HOW WE SPEAK ABOUT IT

Quiet & gentle:

- Less traffic: For example, Thailand has the world’s second most dangerous roads³⁶ and one of the world’s biggest communities of cycling enthusiasts.³⁷ Taiwan is another such market. Laos offers quieter roads with less traffic and cleaner air on which the serious or the less-confident cyclist can feel more comfortable. (Examples might include a casual hour-long cycle along Vientiane’s Mekong Riverfront, or a serious four-day cycle on the Thakek or Bolavan Plateau Loops.)
- Less crowded: In Laos, unlike Thailand or Vietnam, it is easy to get out into nature and away from people. Hiking, ziplining, tubing, cycling, etc. can all take you deep into forests where you don’t see other tourists or people at all, while cruising through villages and towns enables the visitor to view Lao life up close but you’re unlikely to be harassed by curio sellers or beggars.

Beauty:

- Active Travelers can focus on the beauty of nature, rather than just trying to stay alive, avoiding traffic and filthy air.
- Suggested marketing: “Find your inner beauty: meditate, or express your creativity, at an unhurried pace in an uncrowded place.”

3.2.1.2 Exploration

Willing to see and explore all a destination has to offer.



This target market will get out and about and go and see things – but this is not about ‘off the beaten track’ exploration. These are the people who will rent a motorcycle or take a tuktuk so that they can see as much as possible.

These are naturally curious people who love variety: a mix of culture and landscape and activity.

³⁶ According to research by the University of Michigan Transportation Research Institute in 2014, quoted in *Scientific American* on August 18, 2015 via <https://blogs.scientificamerican.com/plugged-in/thailand-breaks-world-record-for-mass-cycling-event/>.

³⁷ In 2015, with 294,800 participants, Thailand broke the world record for a mass cycling event previously held by Taiwan with 72,919 cyclists, according to *Bangkok Post*, August 17, 2015. Retrieved via <https://www.bangkokpost.com/archive/bike-for-mom-sets-world-record/657408>.

MARKET POSITIONING: LAOS'S USP & HOW WE SPEAK ABOUT IT

Discover:³⁸

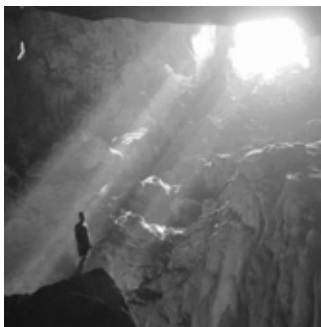
- Variety of foods: “Share our love of sticky rice, eaten by hand; try local delicacies such as ant egg laap, taste coffee beans fresh from the tree, or find the best croissant ever.”
- So many cultural traditions: Over 160 ethnic groups, with a multitude of traditions and beliefs and many people still wearing their traditional clothing, especially on festival days.
- Different modes of transport: “Try a motorcycle for the first time and head off on a multi-day journey of exploration to see waterfalls, caves and coffee plantations on the Bolaven or Thakek Loops. Take a selfie in a tuktuk and send it home to those stuck in the traffic.”

Beauty:

- Natural: “Waters of jade green or cool blue, karst landscapes you’d only thought possible in the movies, forests thick and green and expanding beyond the horizon...”
- Handmade: “Admire the Lao women in their stylish sinhs, find your own unique embroidered or woven bamboo curio. Artisanal beauty so different from the mass production of the rest of the world.”
- Inner: “Quietly participate in the daily alms-giving rituals as dozens of orange-clad monks file modestly past. Meditate at a monastery, or have your cares and stresses massaged away in the Lao style.”

3.2.1.3 Novelty

Desire to find something new – whether a tangible place to visit or intangible life experiences.



Note that this *something new*, is about what is new to *this target market* and their friends and communities. So many roleplayers in tourism in Laos are not sufficiently familiar with the everyday lives and cultures of tourists to Laos, that they are unable to identify what is *new* and fresh and different about life in Laos. For example, the Western tourists’ desire to see and photograph the Luang Prabang *tak bat* is because it’s a new and unfamiliar practice to them. The attitude behind the Buddhist giving-and-receiving principles are generally novel and fascinating to those from Christian, Jewish or Muslim backgrounds.

While the notion of *Discovery* – Inspiring Discovery, Journey to Discovery, Discover Yourself – was suggested and accepted as the ‘Cultural Essence’ of the Lao Brand through Quo’s *Laos Brand Strategy & Culture v3*, it arguably applies to the Novelty-seeking target market segment more than any other.

And as noted in the description, the novelty – the new discovery – is both literal and figurative: it is *tangible* (You can touch it: underground rivers that you paddle through in the dark, immense cathedral-like caves filled with beautiful forms...) and *intangible* (You can’t touch it, but you feel the reverence, the awe or the spirituality inside you.)

In addition, new discoveries – new and news to Laos and International alike – are being made here all the time. From archeological finds at Sepon and Plain of Jars, to new large animals in the Annamites and new enormous caves, such as Xe Bang Fai. Laos Tourism should highlight all the new finds: the secrets still being revealed now. Laos has lots of wow-factor finds. That traveler from London, Paris, New York who loves being the first guy to see the new movie or discover the new music style will want to come here to see the new finds before the rest of the world discovers it.

Key phrases to attracting this target market segment include *new, secret, discovery, biggest/smallest/deepest/oldest/latest, unique*.

MARKET POSITIONING: LAOS'S USP & HOW WE SPEAK ABOUT IT

Discover:

- New archeological finds: “Did you know that the archaeological finds at Sepon are more than 2000 years old – the incredible copper drum has challenged historians’ beliefs around the globe about when that form of casting was invented?”
- Extraordinary Wildlife: “Did you know about the entirely new animal, the Saola, that was recently discovered here? Not a tiny little bug but a great big buck, one of the rarest large animals on earth.”³⁹

³⁸ This notion of *Discovery* – Inspiring discovery, Journey to discovery, Discover yourself – was suggested and accepted as the ‘Cultural Essence’ of the Lao Brand by Quo’s *Laos Brand Strategy & Culture v3*, p58.

³⁹ “The Saola (*Pseudoryx nghetinhensis*) is one of the rarest large animals on earth. It is the sole species of a genus of bovids, and has been known to science only since 1992,” according to the Saola Working Group via <https://www.savethesaola.org/the-saola/what-is-a-saola/>.

- Massive caves: “The enormous Xe Bang Fai cave remained virtually unknown except to locals until a National Geographic survey brought it to world attention through an expedition in 2008. Be the first of your friends to see it with your own eyes.”⁴⁰

Beauty:

- Strange and unfamiliar: “You’ve seen a forest of trees, but how about a rock forest? Be awed by the strangely beautiful and unique topography of the Limestone Forest in Central Laos.”
- Spiritual and festive: “Participate in a traditional Buddhist ceremony or festival – get some candles, incense and flowers and join the procession circling Laos’s most esteemed national monument, the That Luang stupa (is there really a Buddha bone at the center of it?), in November, or cast your worries and cares away as you send a little bamboo raft down the river in October.”

Quiet:

- Uniquely uncrowded. “Ever slept in a treehouse? What about one high above the jungle canopy, with only rare gibbons as neighbors? Trade in the noise of the city for the sounds of birdsong.”

3.2.1.4 Recharge

Chance to unwind and escape in a peaceful destination – whether alone or with others.



The major world economies are facing crisis. Ironically it is the richest people who speak most about being stressed. The price of oil has plummeted, the dollar is no longer stable, the largest economies are becoming volatile, security in international capitals is on high alert. People around the world are feeling frazzled, stressed and under attack: they want to get away.

Tourism Laos’s strategy should be to catch them when they’re stressed. When they are dreaming of getting away from it all.

Note that Laos does not have sea and beaches. But Laos does much of what many people go to the seaside for: tranquility and an excuse to lie around and do nothing. Bear in mind that many people who go on beach vacations hate sand, salt and sun. But they do like to lie around and relax and read a book, guilt-free. And often they want a safe place for their children to play.

Laos offers plenty of all this.

Key words and phrases include *escape, relax, get away, recharge, chill, hang out.*

MARKET POSITIONING: LAOS’S USP & HOW WE SPEAK ABOUT IT

Quiet:

- Relaxed schedule: “Put your feet up in a shady hammock in a forest. Why not do nothing but collect your thoughts all day?”
- Gentle pace: “Take a slow boat down the Mekong and watch village life glide tranquilly by. Or indulge in a long bout of reading while nibbling on a croissant in one of Vientiane’s new quirky coffee shops.”

Beauty:

- In nature: “Settle back in your boat, head into the calm of the ‘night’ and prepare to be recharged by awe as you head on a riverine journey through a mountain to a lit-up wonderland of fantasy cave formations at Kong Lor.”
- In traditional handicrafts: “Calm your mind with rhythmic, meditative movements as you learn traditional Lao weaving skills.”

⁴⁰ “The cave chamber, measuring an average of 76m width and 56m in height, creates one of the largest active river cave passages in the world. Although there were two 20th century explorations by the French (1905 & 1995), this cave remarkably remained virtually unknown except to locals until a National Geographic survey brought it to world attention through an expedition in 2008,” according to the Hin Nam No website. Retrieved from <http://www.hinnamno.org/from-the-units/eco-tourism-unit/xe-bangfai-river-cave.html>.

3.2.2 SECONDARY MARKETS

3.2.2.1 Affordable Escape

Seeking a nearby destination for an enjoyable escape within a budget.



“Laos is perceived as poor value for money by a lot of tour operators in comparison to its regional competitors (expensive in comparison),” the Destination Management Plan notes.⁴¹

However, for regional neighbors who live nearby, would enjoy eating street food and who have their own vehicles or will use public transport, such as the good quality busses and trains from Thailand, Laos can be an excellent option, particularly for repeat, short-stay trips.

Thailand and China should be specifically focused on in this regard, using all the USP language of the Primary Market segments.

3.2.2.2 Indulgence

Seeking time away in luxurious surrounds primarily to pamper themselves and relax.



This aspirational market segment is more relevant to a more distant Laos Tourism future but should not be forgotten. Bear in mind that ‘luxury’ is in the eye of the beholder, and Laos already has a plethora of hotels that would be considered luxurious to many. The range of new upmarket hotels coming online will also make a significant difference. Ideally too, luxurious but more remotely-located lodges will be developed.

And then there are the alternative notions of luxury: for a city-bound executive, a night in a treehouse above pristine forest is the ultimate luxury.

41 Lao PDR Tourism Destination Management Plan 2016-2018, p12



3.2 HOW SHOULD WE SPEAK TO THEM?

3.2.1 SPEAK ABOUT THEM & THEIR INTERESTS, NOT JUST ABOUT US

Ensure subject matter and imagery is focused on the target market segments and their interests, showing how Laos can fulfill these. Attractions and itineraries on websites and brochures, for example, should be grouped by activity and interest, rather than by province.

3.2.2 DIRECTLY. AS A TWO-WAY CONVERSATION.

That probably means digitally. It's all about economies of scale: we can have real, direct conversations with so many more people when we use the tools that the digital revolution has provided. And they're mostly free.

This is about both speaking and listening, not just lecturing – in person or writing tone – to a large anonymous group of people. And it's about listening and responding.

Digital can do that.

3.2.3 WITH TERMS THEY UNDERSTAND

Tourism Laos must use descriptions that are useful to the reader, rather than convenient for the writer. Talk to them in a way that makes them feel more informed and less confused.

Be wary of too much Laos-specific extraneous information that means nothing to the tourist. For example, names of districts when describing an attraction are often meaningless.

And be careful of acronyms. For example, “the Acronym ‘ASEAN’ is in fact not known to most consumers of ASEAN tourism who are more familiar with the regional name Southeast Asia or specific countries therein having learned of these at school or in current affairs,” the ASEAN Strategic Plan 2016-2025 notes.

That's how we should speak to them. But first we need to reach them to do so. The next section shows how.





4. Marketing Activity

Marketing to date has been largely focused on trade fairs and on print. The Visit Laos Year 2018 has been extremely successful in marketing itself within Laos, as well as engendering queries amongst regional media. This success in marketing the existence of the campaign must now be followed up by expanding to promoting actual attractions, rather than a general concept.

4.1 ONLINE

*With almost half of the global population using the internet as of 2017 and three-fourths expected to do so by 2030, according to Euromonitor International, connected travelers are here to stay. As such, it is imperative that travel players rethink their long-standing strategies in order to appeal to this new consumer type, which is more impatient, connected, demanding and informed than others.*⁴²

Laos's tourism marketing must rethink its reliance on brochures, posters, street banners and trade fairs, and must move the bulk of its marketing online. This requires a fundamental shift in thinking, as well as a vital investment in training and capacity-building of existing staff. Digital seems cheap, but it is costly in terms of human resources.

And digital is nimble. Via web and social media, we can respond quickly to new opportunities. The Lao tourism industry's lack of response in 2017 to the US movie *Blood Road* is an example of an opportunity that could and should have been responded to very quickly.

The market has moved online.⁴³ Laos Tourism's marketing must move there too.

"Seeing as a country's NTO [National Tourism Organization] functions as the gateway to its Country Brand, its online diffusion, both through its official website and presence on additional online platforms, contributes greatly to the brand's overall success."⁴⁴

Laos must shift the bulk of its marketing spending from print and in-person to digital. All of the most successful Destination Management Organizations around the world are dedicating more than half of their total marketing budget to digital. Australia and Thailand, the world's two top-performing destination brands in 2017, are examples of this, according to Bloom Consulting's Country Brand Ranking © 2017, which notes the importance of the social media and online presence of both.⁴⁵ For Tourism New Zealand, one of the world's most successful tourism brands in recent years, with some of the greatest barriers to overcome, 90% of their global marketing spend is digital, and in some markets, 100% digital.⁴⁶

42 Euromonitor International via Skift: Retrieved from <https://skift.com/2017/12/18/brands-must-rethink-engagement-with-the-new-digitally-connected-traveler/>

43 "Intermediaries registered a bumper year in 2016, with online travel agencies performing particularly well. Mobile OTA sales increased by 48% in Asia in 2016. A main contributor to this growth is Chinese OTA Ctrip, which has been making a steady rise onto the global stage. The company bought SkyScanner in December 2016 for GBP 1.4 billion and is interested in entering the European and American markets," according to Euromonitor International in its *Top 100 City Destinations Ranking WTM London 2017 Edition*.

44 Bloom Consulting's Country Brand Ranking © 2017 Tourism Edition, p9. "In order to assess the performance of an NTO website, Bloom Consulting utilizes a website analytics tool to calculate the number of total visits to and average total time spent per visitor on the official webpage. Our algorithm rewards websites with a higher number of visitors and greater digital reach.

Our algorithm additionally accounts for the social media diffusion by evaluating its presence on Facebook, Twitter, and Instagram. The more likes or followers that the official NTO account has on these platforms, the better its ranking will be. If an NTO is inactive or does not have an account, our algorithm penalizes its Country Brand ranking."

45 Bloom Consulting's Country Brand Ranking © 2017 Tourism Edition, p27. "Thailand is arguably the standout nation in this year's ranking. Not only has it conquered Hong Kong SAR to reclaim its Asian throne, it has also excelled in the Global Ranking, jumping a superb 4 positions - from 6th to 2nd. Thailand's phenomenal hike up the ranking is the product of a surge in tourism receipts and continuing strength in Digital Demand ©, alongside solid scores in the variables of social media and online performance. This ensures that Thailand perch on the top of Asia, and bask in a highly impressive position of 2nd in the world... For the second consecutive year, Australia continues to rank as the top performer in the world in terms of social media and online presence."

46 "Tips for smarter digital marketing from Tourism New Zealand" on www.destination.think.com, September 9, 2016 via <https://destinationthink.com/> smarter-digital-marketing/.

4.1.1 CURRENT

4.1.1.1 Websites

Official website: <http://www.tourismlaos.org>

Strengths:

- Significant quantity of content
- Good variety of imagery incl. slider headers
- Prominently shows map with Laos location and neighbors
- Events and festival calendar prominently displayed on front page
- Prominent social media linkages showing featured imagery
- Weaknesses:
 - Very dated aesthetic, not in keeping with brand guidelines
 - Unnecessary clutter and flashes on front page, e.g. 'In Partnership With'
 - Tourism statistics via Tableau well displayed but should not be so prominent
 - Only one language translation option (Korean) but leads to blank page
 - Much of the content very thin – e.g. Where to Stay, Attractions
 - Writing style inconsistent
 - Province information diverts from main site with no obvious way to return apart from back button
 - Social media draws viewers away from the site, rather than to it
- Opportunity:
 - Use existing information as a basis but recreate a new site from the ground up following international destination management best practice.

Eco-tourism Website: <http://www.ecotourismlaos.com>

- Very attractive looking site with imagery and text tone that speaks directly to its target market.
- Does not fit the Lao brand guidelines. Unclear how this connects to the main tourism site.

Blog: <http://laosimplybeautiful.blogspot.com>

The rationale for this blog is unclear. Blogging functionality should be integrated into the new site, with sharing from there to social media.

4.1.1.2 Social Media

The Department of Tourism Marketing has done an excellent job of setting up and populating sites on most international social media, usually incorporating "Simply Beautiful" as part of the url or tag. It is evident that a fair amount of work has gone into this but that the implementers lack an understanding of the mindsets of the markets, as well as the time and language ability to develop a conversation:

- Updates are not regular
- Tone of commentary, quality of photographs and details of metadata are inconsistent
- English grammar is weak
- Segmentation is usually by province or photo subject matter, rather than by market interest
- Description invariably credits the department rather than selling Laos.
- Shares or retweets of other content are often wholly inappropriate to the subject matter

- Headers are often made up of composites of images with no direct impact

4.1.2 STRATEGY 2019-2022

4.1.2.1 Fish where the fish are biting

More than any other retail sector, travel research and purchases are now made online.⁴⁷ Laos should focus on this modern behavior, rather than the way it was done in the past. Shift from a focus on print brochure, pamphlet and poster production to online.⁴⁸

4.1.2.2 Use a big net

Using a print brochure is like using a fishing line: one tool to catch just one at a time. We need to use a net: one tool to catch many at the same time. Brochures and posters must be online in the places people are already going to do tourist research and bookings, and where many thousands of people can see that online brochure or poster. Then pull them in towards the place where we control the information: our website, or microsites that we manage.

And then encourage people to share.

4.1.2.3 Catch them while they're dreaming

To do this, Tourism Laos must focus on social media, particularly picture-based, such as Instagram.

4.1.2.4 Pull them in

- Make planning easy. Offer itinerary suggestions already tailored to their interests and the market segment typologies.
- Make bookings easy. Link to flights, to tour companies, to accommodation.
- Use microsites on bookings engines where Tourism Laos can control all the surrounding content and distractions, e.g. TripAdvisor, Booking.com, etc.

4.1.2.5 Measure & adjust

Be clear about goals > Set targets > Implement > Measure⁴⁹ > Adapt > Implement >

Where to get the data?

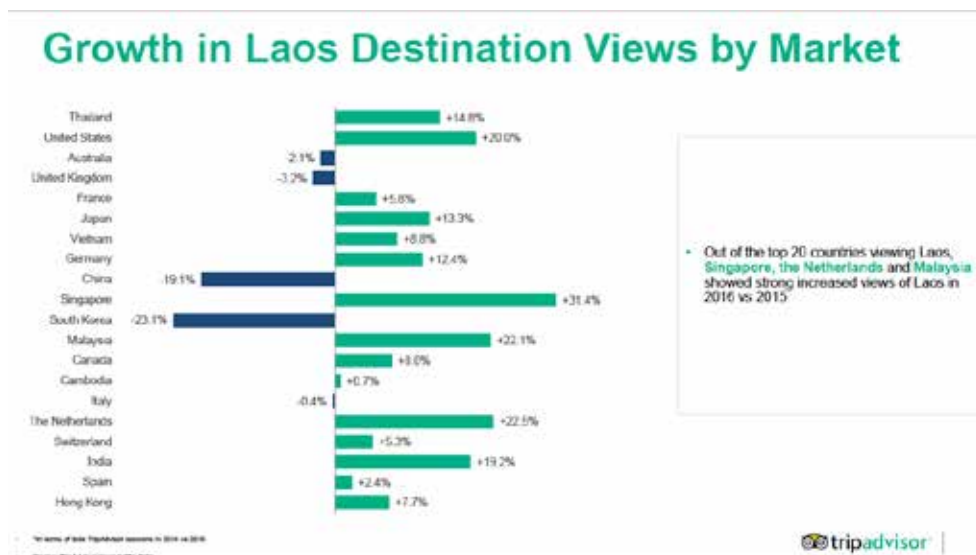
- TripAdvisor – for decision-making information, especially by FITs
- UNWTO and the like for country-specific travel trend data

47 “In particular, travel continues to be one of the industries most impacted by the emergence of the connected consumer as a greater percentage of consumers use digital channels to plan, pay and post their travel experiences.” – Euromonitor International, Dec 18, 2017. Retrieved from <https://skift.com/2017/12/18/brands-must-rethink-engagement-with-the-new-digitally-connected-traveler/>

48 Look at an obscure country like Iceland, which has suddenly caught the world's attention. Of respondents, about 85 percent said that they had mainly used the internet in the form of websites, blogs and social media to inform themselves before traveling to Iceland.” – from <https://www.statista.com/statistics/746030/sources-of-information-used-for-travel-to-iceland/>

In a survey conducted in the United States in January 2017. U.S. adults who would like to go on a spring vacation were asked which channel they prefer to use when searching for spring vacation destinations. During the survey, 95 percent of the respondents said they prefer using an online channel. – from <https://www.statista.com/statistics/666622/preference-of-online-or-offline-vacation-research-us/>

49 Lao PDR Tourism Destination Management Plan 2016-2018, p20: Marketing/Promotion Activities A14



4.1.3 IMPLEMENTATION

4.1.3.1 Develop new website in line with brand expression, relevant to key tourism markets⁵⁰

WEBSITE IS A CENTRAL INFORMATION-SHARING PIECE.

The website(s) is the central part of the net that we draw people to. This is an urgent priority.

It must be audience-focused:

- Translated and content-targeted to different language audiences, incl. Chinese, Vietnamese, Thai, Korean and French. (Y1: Launch in Eng. Dec 2018: Chinese, Thai. July 2019: Vietnamese, Korean, French. July 2020: German, Japanese)
- Start with the audience, not with Laos – what are people looking for? What do they know or not know? Divide by the market's interests, not by Laos's provinces or regions. Suggest itineraries.
- Make it eye-poppingly beautiful – simple design, magnificent photos. Being on the website must be like being on holiday: relaxing, inspiring and fun.
- Include tools for the media audience – image and information downloads

Content must be of highest quality:

- Fresh photographs with informative captions
- Well-written and engaging text that is 100% grammatically and factually correct

Highly sharable and share-worthy:

- Mobile-first
- Interactive, incl. for submission of images and questions from the public
- Embedded videos that bring viewers to the site, not to YouTube or Vimeo, when shared.

Regular updating and maintenance must be financially sustainable:

- Integrate bookings engine links
- Include banner advertising where appropriate (not the front page)
- Built on easy-to-use, open-source software that does not require a specialist to update or maintain⁵¹

Content provision and approval process must be clear:

- Content Manager to supply all content – text, images and choice of highlighted content

⁵⁰ Lao PDR Tourism Destination Management Plan 2016-2018, p19: Marketing/Promotion Activities A4

⁵¹ In 2018, that means WordPress. Ideally too it should be on a standard template that does not require specialist updating or maintenance.

- Inbuilt, online MICT approval process for website text and image updates and sharing to social media

Communication must be two-way, accountable, and measurable:

- Website offers digital visitor center: questions asked via chat and email are responded to personally within 24 hours
- Online ‘contact us’ form quantifies types of queries and identifies content lacks and information confusion

4.1.3.2 Get social

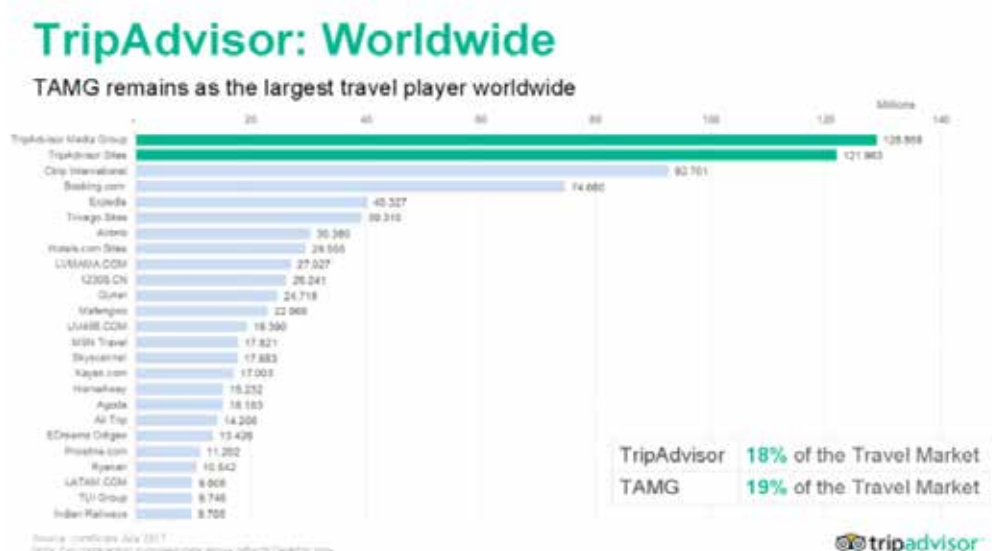
DEVELOP A SOCIAL MEDIA PLAN FOR PROMOTING LAOS⁵²

Social Media General

- Instagram: increasingly the home of dreamers. Assume the audience has never heard of Laos and is not necessarily planning a holiday. Wow them with incredible photos. Lead them on a journey through hashtags: When somebody is stressed and they search ‘relax’, Laos should come up. When somebody is bored, and they search ‘exotic adventure’, Laos should come up. Next step: they’ll Google ‘Laos’. That’s where our website should come up.
- Facebook: make sharing easy with magnificent photos and eye-catching short videos.⁵³
- Twitter: Tool of the international community: treat this as a conversation. Get involved in conversations. Share photographs.
- WeChat: Dominant in China and will expand around the world. Laos needs a strong WeChat marketing and sales presence that links to the Chinese pages of the website.
- Weibo
- What else? New social media will emerge. Laos does not need to be on every one: choose the dominant ones and do them well.

Online Reviews and Bookings

- TripAdvisor: the largest player worldwide. This should be our focus.



52 Lao PDR Tourism Destination Management Plan 2016-2018, p20: Marketing/Promotion Activities A13

53 “Facebook is one of the prime destinations for sharing life events and travel related content. 52 percent of users surveyed said their friend’s photos inspired travel plans, and 76 percent post their vacation photos to social networks.” – ‘Social Media & Travel Go Hand in Hand’ by Kimberlee Morrison in Adweek, August 17, 2015 via <http://www.adweek.com/digital/social-media-and-travel-go-hand-in-hand-infographic/>



- Ensure comprehensive listings
 - Ensure country information is accurate and photographs are stunning
 - Banner ads on competitor pages
 - Microsite for Laos-only web experience
 - Booking.com: partner locally to ensure comprehensive listing of guesthouses and accommodation
 - Agoda: partner locally to ensure comprehensive listing of guesthouses and accommodation
 - Hotel.com: partner locally to ensure comprehensive listing of guesthouses and accommodation
 - WeChat: Integrate all marketing and bookings activity into WeChat as much as possible. WeChat allows its users to find and book trips, check in for flights and hotels, contact customer services, book activities or restaurant tables, scan QR codes to buy products or turn on the lights or TV in their smart hotel room. Peer-to-peer payments are enabled, so even users without a bank account can use the app to receive and make payments.⁵⁴
 - Others?
- A) PROVIDE TRAINING WORKSHOPS ON THE USE OF SOCIAL MEDIA TO KEY MARKETING PEOPLE (E.G. SMES AND TOURISM MARKETING DEPARTMENTS)

This is best done through both formal workshops and on-the-job training and mentoring by the Content and Community Managers.

4.1.3.3 Develop mobile Apps⁵⁵

- A) A LAO-SPECIFIC, ATTRACTION-BASED TRAVEL APP
- Must work offline
 - Focus on Lao and Thai audiences, and possibly Korean and Chinese?
 - Include detailed route planning.
- B) OTHER APPS:
- Submit info to mapping apps, e.g. Google Maps, Apple Maps, Maps.me, etc.
 - Flesh out general multi-destination apps with detailed and accurate Lao data, e.g. Afar, Everplaces, etc.

⁵⁴ "With more than 750 million users and expansion plans in Europe and North America, WeChat offers major opportunities for travel brands." – *Top 100 City Destinations Ranking* WTM London 2017 Edition, Euromonitor International

⁵⁵ Lao PDR Tourism Destination Management Plan 2016-2018, p20: Marketing/Promotion Activities A8

4.1.4 IMPLEMENTORS

4.1.4.1 Website

Content Manager decides text, images and features per page.

1. Approval via MICT Marketing Department
2. Web Designer creates site
 - in line with briefing from Content Manager
 - following brand guidelines
3. Content Manager and Web Designer train approved MICT staff in content provision, IT maintenance, formalized online approvals process.
4. Content Manager and Community Managers update monthly in accordance with approved marketing strategy action plan and through online approvals process.

4.1.4.2 Social Media

1. International Content and/or Community Manager⁵⁶: - “A DMO’s community manager tactfully places the destination’s message in front of millions of people. Millions. The CM is the equivalent of the TV show host, a best-selling author and the lead singer of a rock band. They are the voice of your destination.”⁵⁷
 - provides ongoing technical assistance and mentoring to MICT staff
 - handles all implementation for international audiences
 - is admin manager on all accounts
 - briefs MICT staff before each trade show and sets them up to share from events
7. 3 x Community Managers adapt the international content for their specific target audiences.
8. MICT staff share these updates in Lao language
9. SMEs after training⁵⁸

4.1.4.3 Mobile App

1. The App Developer creates the app and populates with content in Lao and possibly Thai language.
2. Download links for the app are added to the website by Web Designer.
3. App is marketed to the Lao audience through social media by MICT Marketing Department, and to Thai audiences through social media by Thai Community Manager.
4. Annual updating of the app content to be assessed by Content and Community Management Team.

4.1.5 TARGETS AND MEASURES

Website

The goal of the website is to convert interest in the destination into bookings. Measures should include:

- % increase in unique views by each priority market
- Number of defined goal actions (for example, a ‘Find out more’ button, or ‘Contact us’ query)
- % increase in viewing time per page
- % increase in page views per unique user

⁵⁶ See Section 6: Governance, Leadership and Human Resources.

⁵⁷ ‘Your content manager is your DMO’s most important hire’ by John Freeman in *DestinationThink!*, May 20, 2016 via <https://destinationthink.com/content-manager-dmo-most-important-hire/>

⁵⁸ *Lao PDR Tourism Destination Management Plan 2016-2018*, p20: Marketing/Promotion Activities A13

Social Media

The goal of the social media is to capture attention of target audiences and drive them to specific interest in the destination. Measures should include:

- % increase in unique views of official website by each priority market achieved through each social medium
- % increase in engagement (as measured by comments and shares on posts)
- % increase in uploading of user-generated content
- % increase in use of defined tags (e.g. #laosimplybeautiful, #beautifulaos, #heartofseasia)

App

The goal of the app is to increase domestic tourists' knowledge of Laos as a destination. Measures of success could include:

- Number of monthly downloads
- Number of in-app contacts dialed or messaged (as a measure of bookings)

4.2 TRADE

4.2.1 CURRENT

In 2018, plans are for Laos to be represented at 13 trade fairs:

ASEAN Tourism Forum (ATF), Chiang Mai

Internationale Tourismus-Börse (ITB) Berlin

Salon Modian du Tourism (SMT), Paris

Laos Festival, Tokyo

Thailand Travel Mart Plus (TTM+), Pattaya

International Travel Expo (ITE), Ho Chi Minh

World Travel Market (WTM), London

Japanese Association of Travel Agents (JATA) Tourism Expo, Tokyo

Internationale Tourismus-Börse (ITB) Asia, Singapore

China International Travel Mart (CITM), Shanghai

Cambodia Travel Mart (CTM), Phnom Penh

MTM, Myanmar

ITE, Hong Kong

4.2.2 STRATEGY 2019-2022

Travel trade fairs are losing their relevance extremely quickly. "The digital transition has taken over the business of selling tourism at breathtaking speed," Messe Berlin admitted after ITB Berlin 2017.⁵⁹

Long-standing regional fairs such as the Asian Tourism Forum are finding the same thing.⁶⁰

⁵⁹ "Commenting on the outcomes, Messe Berlin noted that 'one of the trends, which has taken hold everywhere in the travel industry was evident at all of the 26 display halls: the digital transition has taken over the business of selling tourism at breathtaking speed.'

In the long-run the digital revolution will continue to disrupt the traditional channels used by the travel industry to conduct its business and that includes trade fairs and travel agents. Digital disruption will challenge the travel agency sector the most probably ending the careers of most enterprises except those in specific niche markets that still demand a personalized expertise, or rely on complicated itineraries beyond the online channel capabilities. But it is only a matter of time. Travel agents are boxing back to the corner ropes.

Ultimately, the attendance of an army of trade visitors that events like ITB rely on to sell exhibition space will decline as consumers take command of their travel decisions mainly using their mobile devices. The business of selling tourism will no longer be in the hands of travel agents, but in the hands of consumers. The ease of researching, booking and buying travel direct on a smart phone, will make travel consultants a dying breed and those who do survive will be digitalized to the hilt and connected without the need to attend trade shows to connect with their partners." - 'ITB Berlin tots up more exhibitors' by Don Ross in *TTR Weekly*, March 13, 2017 via <http://www.ttrweekly.com/site/2017/03/itb-berlin-tots-up-more-exhibitors/>

⁶⁰ "Is the ASEAN Tourism Forum, with all of its expensive trappings, running out of steam? Possibly and even its strongest supporters are voicing con-

For Tourism Laos, this can be good news. Trade Fairs are extremely expensive, and Laos has not previously excelled at them. The human resource and financial costs can be more effectively and measurably used elsewhere.

When trade fairs *are* attended, it should be done extremely strategically, exemplifying the simplicity, beauty, tranquility and modernization of Laos.

4.2.2.1 Identify the most relevant international travel trade fairs for key markets and attend⁶¹

Relevance is based on:

- Tourism Laos' goals for specific market expansion – e.g. increase size of China market: attend Shanghai World Travel Fair (SWTF) or ITB China or CITM.
- Cost per deliverable attained (start measuring in 2018: cost of attendance divided by quantified deliverable on goals, e.g. cost of attendance divided by number of new contacts)
- Associated opportunities provided, e.g. media meet-ups, tech innovation showcases, trend reporting and analysis, etc.

4.2.2.2 Explore alternatives to Trade Fairs

A) ROADSHOWS

Fewer trade fairs does not mean less international travel for Lao tourism representatives. Consider a roadshow in which a small group of Tourism Laos representatives visit a targeted area high in density of regional tour agents/operators (e.g. New York, Seoul, Sidney, Tokyo) in their own offices.

Pros include:

- Much cheaper: no exhibition fees, set-up costs or stand transport costs
- Meet with a range of representatives at a single client – e.g. the FIT + Tour + MICE Markets sales reps for each agency/operator
- More time per meeting means a more authentic interaction with more detailed information discussed
- Develop real relationships
- Capacity building: Participants experience being an FIT tourist in that market

B) AGENTS

Employ agents in key markets.⁶²

Pros include:

- Specialist travel sales and marketing agents know their specific markets
- Usually commission-based so few upfront costs.

C) POP-UP VISITOR CENTRES

Set up temporary exhibitions in cost-effective locations in high population density areas. Examples include embassies and the offices or showrooms of leading travel agents.

4.2.2.3 Go Digital

Just as so much communication with the consumer is now digital, so B2B has predominantly moved online. Tourism Laos must update leading tourist industry players with imagery, ideas, itineraries and inspiration via regular e-newsletter updates, which can be monitored for effectiveness and levels of interest in specific subjects quantified.

This approach means that not only would the key large tour operators in each market be informed, but Laos Tourism's reach can extend to the hundreds of smaller ones in each market.⁶³

cern. The tiny hints of foreboding were seen in the frequent mention of the digital era and the role it now plays for ATF's stakeholders." – "Tired ATF faces challenges" by Don Ross in *TTR Weekly*, January 29, 2018 via <http://www.ttrweekly.com/site/2018/01/tired-atf-faces-challenges>.

61 *Lao PDR Tourism Destination Management Plan 2016-2018*, p20: Marketing/Promotion Activities A10

62 *Lao PDR Tourism Destination Management Plan 2016-2018*, p20: Marketing/Promotion Activities A12

63 "It has been estimated that around 30% of European tourists (est. 66,572 in 2016) book their trip via a tour operator in their home country. There are about 20 larger European key tour operators catering for Laos with an estimated turnover of more than 100,000 USD per year, including Audley (UK), Asia (FR), Studiosus (DE), Hotelplan (SW), Gebeco (DE), Maison de la Indochine (FR). In addition, more than 100 smaller European outbound tour operators offer Laos (less than 50,000 USD sales per year)." – CBI Value Chain Analysis, 2017.

4.2.3 IMPLEMENTATION

- Choose a few trade fairs and do them well.
- Ensure key deliverables for each:
 - New contacts, or followed-up contacts? Product awareness is better through digital. Trade fairs should be for meeting people face-to-face, developing relationship.
 - Each year add at least one new route or itinerary: with pics and details.
- Develop relevant materials (press kits, images, trade fair stand, brochures, presentations, website, merchandise, entertainment, give aways, etc.)

4.2.3.1 Simply Beautiful exhibition stand(s)

The stand and those working on it should showcase Lao beauty, culture, authenticity and modernization. This might include:

- Gleaming walls of silk onto which beautiful photographs are attached. Stand construction should be modular and lightweight, combining natural- and traditional bamboo poles with shiny stainless steel connectors as the support for drops of silk onto which photographs are attached or video displayed.
- Those working on the stand should be wearing the most beautiful sinhs and traditional clothing by day, and modern Lao designer outfits for evening events, with eye-catching jewelry – all loaned. (Yes, simply beautiful Lao calendar-girl style!)
- Make a statement about modern, sustainable Laos: instead of tables filled with untidy brochures, the key medium should be a video; hand out business cards with download links for e-brochures; hang thumb drives on colorful silk tassels for immediate download of brochures.
- Showcase traditional Laos: include handicraft makers creating gifts to distribute to those watching – a different person at each fair.
- Provide a selfie-opportunity: a cardboard cut-out of a Lao attraction to pose in front of.

4.2.3.2 Use all the fair's opportunities

- Press releases in the media room, with suggested article ideas and contact details.
- Volunteer participation in associated conferences/panels/workshops – but ensure talks are of substantial value and storyline, e.g. updates on the China Rail Project progress.
- Pre-make appointments based on event's publicized attendance roster, esp. media.
- Attend workshops and lectures on market trends

4.2.3.3 Make it measurable

A) DELIVERABLES

Set a clearly defined goal for each trade fair: why is Tourism Laos attending and what is to be achieved?

- To make new contacts: list contact details, incl. email, as the deliverable
- To deepen relationships with existing contacts: list contact details and meeting notes for follow-up as the deliverable.
- To create awareness: is this measurable and, if not, can we justify the cost?

B) FOLLOW-UP

Within one month after the event:

- Calculate the cost of achieving deliverables: cost of trade fair show divided by deliverable quantity, e.g. number of new contacts made. Decide: could this show have been done better, or this money used more effectively elsewhere?
- Follow up
 - 'Personalized' (bulk) email to all new and existing contacts, with links to download pdfs, online maps of new routes, etc.
 - Add new contacts to the database for monthly trade/media/consumer e-newsletters

- Reply to specific queries made.

4.2.4 IMPLEMENTORS

4.2.4.1 Joint ventures

- Clothing and jewelry loaned from fashion designers, clothing and jewelry stores and museums – a trade exchange that includes fashion-specific press release and social media links back to providers for each trade show. Consider a partnership with Lao Fashion Week?
- Other Laos products, incl. coffee, tea,

4.2.4.2 Representatives & Agents⁶⁴

- Provide key Laos embassy personnel with the relevant tools to promote Laos using revised brand image (Fact Sheet, FAQs, Experiences, CD of images, PowerPoint presentation etc.) in key international source markets.
- Consider using professional agents in specialist markets, e.g. Korea, Japan, US.

4.2.4.3 Digitize communications

1. Trade and media contact information must be sourced by MICT and the private sector at events, trade fairs, road shows, pop-up visitor centers, etc. as a key deliverable.
10. Community managers target these contacts via e-newsletters, Facebook ‘likes’ and ‘friends’, tagging on Instagram, Twitter, Weibo, etc.

4.2.5 TARGETS AND MEASURES

The goal of trade fairs is to increase the breadth of trade contacts made, and to increase the depth of the relationship with these contacts – to speak to more contacts more often and in more detail about how they can market Laos as a travel destination to their own customers. Measures could include:

- Number of new trade contacts added to the database
- Number of meetings held in which the Laos Destination Briefing Presentation is given
- Number of trade contacts who read, open and click on links in the monthly newsletters
-

4.3 MEDIA & PR

4.3.1 CURRENT

Ad hoc media fam trips have taken place over the past year. Capacity building of the MICT Marketing Division is required to ensure follow-up and delivery by media guests.

4.3.2 STRATEGY 2019-2022

4.3.2.1 Develop a comprehensive PR and familiarization programme (tour operators, media, travel writers, bloggers, celebrities etc.)⁶⁵

Fam trips can be extremely expensive. They must be managed carefully by somebody who is used to dealing with international media and will guarantee strong return on investment (ROI). In the past, media played a key role in destinations reaching target audiences. Today and increasingly into the future, destinations can reach those audiences more cost-effectively by going direct via online communications.

⁶⁴ Lao PDR Tourism Destination Management Plan 2016-2018, p20: Marketing/Promotion Activities A12

⁶⁵ Lao PDR Tourism Destination Management Plan 2016-2018, p20: Marketing/Promotion Activities A9 & A15

4.3.2.2 Slush Fund

The small “Slush Fund” proposed by the private sector would provide quick access to small amounts of money to cover last-minute, immediate needs requests initiated by media. Historically a number of journalists visiting the region have requested a local or regional flight or in-country transport in order to facilitate additional, unplanned media coverage of Laos.

An MICT central mechanism for managing and disbursing these funds is necessary.

4.3.3 IMPLEMENTATION

4.3.3.1 Engage service providers

All tourism product and service providers in key provinces should be engaged and encouraged to participate, with feedback provided on results achieved.

4.3.3.2 Clarify and document expectations

Be clear on what is expected of tourism hosts and media or tour operator recipients, defining this in a written agreement that includes specific expectations.

4.3.3.3 Plan based on themes

Create a theme for each trip in line with a pre-planned campaign, and invite media from those niches, e.g. food, cycling, healing and meditation, etc.

4.3.3.4 Target influencers

Do not just focus just on traditional media such as TV and print, but include online social media influencers.⁶⁶

4.3.4 IMPLEMENTORS

4.3.4.1 PR Department Director

The PR Department and its leadership manages budgets, decision-making and overall implementation.

4.3.4.2 Content Manager

The Content Manager may provide support and capacity building to the PR Department.

4.3.4.3 Community Managers

These provide vital market intelligence and influencer suggestions from their regions.

4.3.5 TARGETS AND MEASURES

The goal of generating media and PR is to distribute information about Laos as a destination as widely as possible, through highly creditable sources. Measures should include:

- Number of articles of media generated per market (e.g. how many newspaper articles in each country)
- Reach of each publication per article (e.g. the readership of a magazine that writes an article)
- Value of each article published (i.e. the theoretical advertising cost corresponding to the size of the article published less the cost of hosting that journalist)

4.4 ADVERTISING

⁶⁶ For example, Murad Osmani is one of the most-followed travel influencers worldwide on Instagram with over 4.3 million followers. His series “Follow Me To”, made with his wife Natalia Zakharova, went viral in 2012, and the couple have since been named as top travel influencers. – from <https://www.statista.com/statistics/785925/most-followers-instagram-travel-world/>

4.4.1 CURRENT

The Visit Laos Year 2018 campaign provided unique funding for advertising on CNN Asia and its related websites. Apart from this, Tourism Laos has not previously invested in advertising, apart from ad hoc print advertisements in trade publications linked at the occasion of trade fairs.

4.4.2 STRATEGY 2019-2022

This Laos National Tourism Marketing Strategy is based on a shift to digital marketing. This strategy does not propose television or print advertising as cost-effective marketing options. Existing budgets should not be diverted to these but must be highly focused on targeted, specific, measurable avenues.

4.4.3 IMPLEMENTATION

4.4.3.1 Target specific demographics

Advertising must target very specific demographics, including age, nationality and interests. This is best done online, primarily on social media.

4.4.3.2 Payment on delivery

Focus must be on payment only on delivery – for example Pay Per Click (PPC), or Facebook and Instagram “boosting”, or banners on TripAdvisor. Each of these is specifically tailored to the user profile and history of the individual viewer.

4.4.3.3 Analyze and adjust

Results and data delivered by these methods must be analyzed monthly, with outcomes influencing the immediate next funding cycles.

4.4.4 IMPLEMENTORS

4.4.4.1 social media managers

The 3 Community Managers for international markets and the Lao social media implementer in the MICT PR Department must work together under the guidance of the Content Manager to research, implement and analyze, reporting back to the MICT Marketing Department monthly on results.

4.4.4.2 MICT marketing Department

The MICT Marketing Department, through its monthly meeting coordinating mechanisms, provides approvals on forward planning provided by the Content Manager.

4.4.5 TARGETS AND MEASURES

The goal of advertising is to attract the attention of target audiences who might otherwise not know of the existence of Laos as a travel destination. Measures should include:

- Number of clicks on each advertising instance
- Number of referrals to the official destination website
- Number of clicks on each call to action, e.g. ‘Find out more’

4.5 EVENTS

Events can be excellent catalysts and focus for media attention and travelers. They provide high impetus over short duration for maximum impact, which is usually measurable: we can ascertain how many people attended an event, how many places in the media it was mentioned, etc.

The event itself must market the country. If the event requires a great deal of marketing itself, it is detracting financial and

labor resources from marketing the destination.

4.5.1 CURRENT

To date, little international marketing of Laos as a destination has been done through events. Instead, small promotions have taken place at existing festivals.

4.5.2 STRATEGY 2019-2022

4.5.2.1 Use Cultural festivals to market to domestic audiences

Existing festivals, such as That Luang and Boat Racing, should be used as channels for marketing Lao tourism products to domestic audiences. Festival-goers should be informed about other attractions and tours both within the area and across the country.

4.5.2.2 Use event media coverage to market internationally

New events focused on substantial but targeted audiences must be planned well in advance and implemented with excellence. The focus of each event is not mass participation, but mass coverage of the event in a way that markets Laos as an appealing tourism destination. For example, sports events offer an opportunity for media coverage in the sports sections of major newspapers, TV and magazines both before and after the event – good media follow-up would include articles about international winners in their respective country media.

4.5.3 IMPLEMENTATION

4.5.3.1 Advance event calendar

Develop a calendar of events: festivals, cultural festivals, religious holidays and events etc. and distribute information via website, social media and to travel agents / tour operators well in advance. Ensure that tour operators are informed of national or provincial events as much as two years in advance.⁶⁷ This calendar must be based on Roman calendar dates, with the specific dates and times updated annually.

4.5.3.2 Engage for-profit event organizers

Any new event implemented must be a profitable cost center in its own right, organized by professional event organizers. Seed money for set-up could be provided through MICT Marketing budgets, but event sustainability should not be reliant on MICT and related funding that would otherwise be earmarked for marketing of the country.

4.5.3.3 Target key demographics

Target individual participation events that are showing massive international growth. Sports examples include triathlon, cycling, trail running, etc. These each have very active and centralized communications channels already in existence through which communications can be channeled directly to high-income, preferential demographic audiences. This demographic is usually very enthusiastic about travel for their sport. Some of the greatest growth and spend in the world is within the SE Asian region. Urban hubs such as Singapore, Hong Kong, Kuala Lumpur, Jakarta and Bangkok have significant high-spending populations who would value the open space, landscape and relatively clean air that Laos offers.

4.5.4 IMPLEMENTORS

4.5.4.1 MICT Marketing Department

MICT Marketing Department calls for proposals for new events, clearly defining the role of the event as a destination marketing mechanism, and evaluating sustainability and reach. Endorsement, rather than funding or implementation, are what MICT offers the event organizer.

4.5.4.2 Specialist event organizers

⁶⁷ Lao PDR Tourism Destination Management Plan 2016-2018, p20: Marketing/Promotion Activities A7

The Selected private sector event specialists should plan, manage and profit from new events, using the MICT endorsement to target key audiences. Event marketing must be the responsibility of the event organizer but must be implemented in collaboration with the Content Manager and under the authority of MICT.

4.5.5 TARGETS AND MEASURES

The goal of an event is to market Laos as a destination. Measures of success could include:

- Number of instances the event and corresponding destination are mentioned per key market.
- Number of referrals from event material to the official destination website.
- Value of media generated

4.6 PRINT MATERIALS

4.6.1 CURRENT

There is a strong reliance on print, despite its high cost of both production and delivery to the hands of the target market. New brochures and posters are created annually, both in-house at MICT and by external contractors. The text and picture quality of these varies greatly, and each year's new brochures do not necessarily follow the design of the output from previous years.

4.6.2 STRATEGY 2019-2022

4.6.2.1 Evaluate effectiveness of print vs digital for each product and opportunity

With the move to a digital strategy, print production should decrease in focus and investment. Distribution of information is increasingly more effective online.

4.6.2.2 Follow brand guidelines to build a matching portfolio

All brochures, posters, business cards and other print material should be designed on the same style, so as to build a coherent portfolio over time. A brochure about one province this year should match the new brochure about a different province next year.

The brand guides for "Laos Simply Beautiful" must be adhered to.

4.6.3 IMPLEMENTATION

4.6.3.1 Develop production and design templates

A set of Word, PowerPoint and InDesign templates for the most commonly-needed document and marketing material types should be developed. Both public and private sector should be trained in their use.

4.6.3.2 Develop for traveler typologies rather than provinces

All materials must no longer be structured around Laos's provinces but around the Unique Selling Points of Laos, targeting the agreed traveler typologies.

4.6.4 IMPLEMENTORS

4.6.4.1 International Publishing Expert

Expertise on both international marketing and best-practice publishing can come from Content Manager or another specialist, who should be consulted in the planning of all international-focused materials.

4.6.4.2 Professional writers and editors



These must ensure print and digital material is both grammatically and factually correct for each language of publication.

4.6.4.3 MICT in-house designers

MICT staff will benefit from the use of the pre-approved text and layout templates.

4.6.5 TARGETS AND MEASURES

The goal of printed marketing material is to convey specific information directly to the reader. Measures should include:

- % of each publication delivered directly to end users (e.g. not the number of each brochure that were sent to each embassy, but the number that each embassy distributed to trade or public)



▪

Bloom Consulting has awarded Laos a BBB or “Very Good” rating for its Country Branding Strategy (CBS) for 2017, based particularly on the correlation between popular brandtags searched and those of the Laos Tourism official website and social media.⁶⁸

This is good news for Laos, and perhaps helps to settle the ongoing debate around whether to tweak or change the Laos Simply Beautiful logo and tagline, its key brand assets.

5.1 BRAND ASSETS

5.1.1 CURRENT

The Laos Simply Beautiful logo, tagline, typography fonts and colors were outlined by the November 2007 Branding Strategy Laos.⁶⁹

While the logo and tagline have had significant uptake within MICT, the rest of the elements outlined in the brandbook produced as part of that branding strategy have been largely forgotten or ignored. Fonts and colors have been used selectively with limited adherence to the branding guidelines.

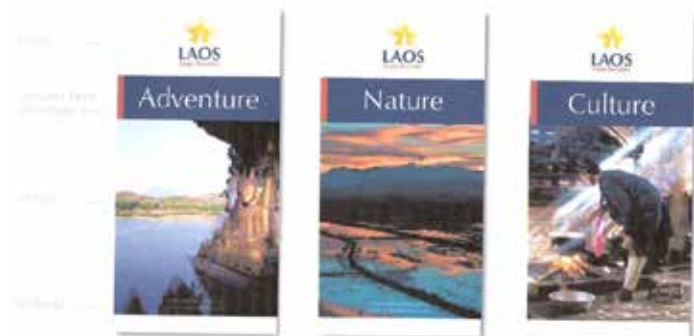
Much discussion has also taken place on the need to revise or replace this branding, but no overall consensus has been reached. Consensus within the MICT is that the “Laos Simply Beautiful” visual assets must not be changed or replaced, despite proposals by other GoL ministries and related roleplayers for an additional set of visual assets that could be used for a cohesive product-based “Brand Laos”.

68 “The third variable of Bloom Consulting’s Country Brand Ranking © evaluates the accuracy of the strategic positioning of the national tourism organizations (NTOs) of all 193 countries and territories included in the ranking. Bloom Consulting measures an NTO accuracy by means of formulae that compare the most popular brandtags (as measured by our Digital Demand © tool) for a specific country to the brandtags most heavily promoted by that country’s NTO.” - Bloom Consulting’s Country Brand Ranking © 2017 Tourism Edition, p8.

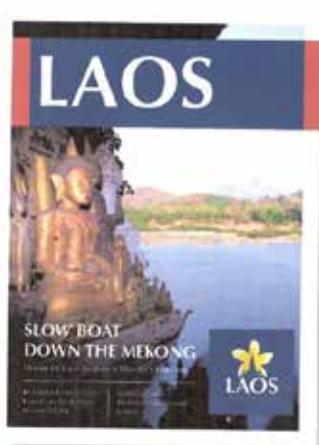
69 Branding Strategy Laos, prepared by Kirsten Focken, supported by LNTA Branding Taskforce, including Thavipheth Oula and Kettason Sundara.

5.1.2 STRATEGY 2019-2022

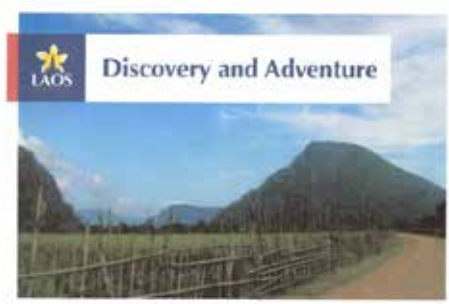
Follow brand design guidelines



LAOS BRANDBOOK
Single brochure cover



LAOS BRANDBOOK
Large poster with photo



The branding guidelines supplied in the 2007 Brand Strategy Laos must be revived, consolidated and followed for all production of print and digital material for the next two years. There should be a concerted effort amongst all stakeholders to stick to the design guidelines, fonts and colors, which were clearly detailed in that document. Sample brochures, guidebooks and banners were all supplied at the time.

Integrate the market position and brand characteristics

Though the brand visual assets – logo, tagline, fonts and colors – remains unchanged, the market position and brand characteristics have been freshly defined. (See below.) They must now be integrated into all marketing by both public and private sector.

5.1.3 IMPLEMENTATION

- Revise the “Laos Simply Beautiful” brand book to clarify areas of confusion
- All Tourism Laos stakeholders should use the agreed fonts and colors on all new websites, brochures, guidebooks, and other marketing materials. (Of course, the branding of private sector takes precedence on their own material).
- Templates for Word and PowerPoint documents should be created and supplied to all who represent MICT or Tourism Laos.
- Training of all MICT design and art department staff in the use of the brand design guidelines should take place as soon as possible.
- Ensure the correct colors and fonts are available on all MICT computers, and that all templates are available for easy download at any time.
- All key imagery, headlines, event and campaign themes, and web and brochure text should focus on the market position and highlight the brand characteristics.
- Respective GoL ministries should collaborate on ways to reinforce this positioning, even when different logos are used.
- Capacity building of provincial DICT marketing staff in this market positioning must take place to enable them to position their respective provinces within that framework.

5.1.4 IMPLEMENTORS

5.1.4.1 All MICT staff

All Tourism Laos stakeholders must use the agreed fonts and colors in their Word and PowerPoint documents, and ensure contractors also do so.

5.1.4.2 MICT Department Heads

In future, no material should be signed off for MICT approval if it does not meet those existing guidelines on the correct use of the colors, fonts and use of logo. Commissioning documents such as TORs and contracts should include the Brand Book and stipulate adherence to it for all marketing deliverables.

5.1.4.3 Design and marketing experts

- The Content Manager and/other expert design and marketing specialists should provide capacity building in market positioning, use of branding, use of templates, etc.

5.1.4.4 MICT IT staff

The Information Technology staff member(s) should ensure all MICT staff have the branding components installed on their computers, especially the brand fonts and Word and PowerPoint templates.

5.2 BRAND MARKET POSITION

To differentiate Laos from its neighboring countries' tourism brands, Tourism Laos must position itself through its marketing as a destination that is:

- Peaceful and laidback, rather than too busy and hectic
- About experiences (both natural and cultural), rather than just seeing the sites⁷⁰



“Laos, a land ruled by the Mekong, one of the world’s mightiest rivers.

The Mekong is fed by tributaries in **deep and pathless canyons**...And so Laos today can still boast a wealth of **natural wonders: uncharted rivers, unclimbed mountains, untouched forests inhabited by mysterious creatures**. Laos is a **last hideout**

⁷⁰ Laos Brand Strategy & Culture v3 'Brand Position' by QUO, pp40-41.

*for some of Asia's big wild animals. Home to dozens of indigenous tribes and cultures, and keeper of a Buddhist tradition **long lost elsewhere.***

*So **in the very heart of crowded and buzzing Indochina**, there is a wonderland still on the brink of its first discovery.”*

The above text, from the opening of the 2014 documentary *Laos Wonderland*,⁷¹ summarizes these two key elements of the market position extremely well.

5.2.1 GENTLE/QUIET HEART OF INDOCHINA

Our key market position is that Laos, in contrast to that of the crowded and buzzing Vietnam and Thailand particularly, is a place for restoration and rejuvenation. The beauty is not only in the scenery, wildlife and culture... Laos's unique tranquility and peace is Simply Beautiful.

The heart symbolizes the genuine caring and warmth of the Laos people, as well as the geographic location. Laos is where the tourist can slow down and find themselves, find new meaning, and find their love for life again.

5.2.2 LAOS: A PLACE OF DISCOVERY

New animals are being found and archeological discoveries made every year. New awe-inspiring caves being opened up. New restaurants and hotels popping up. New tourism products being added...

The notion of discovery is both outward and inward.

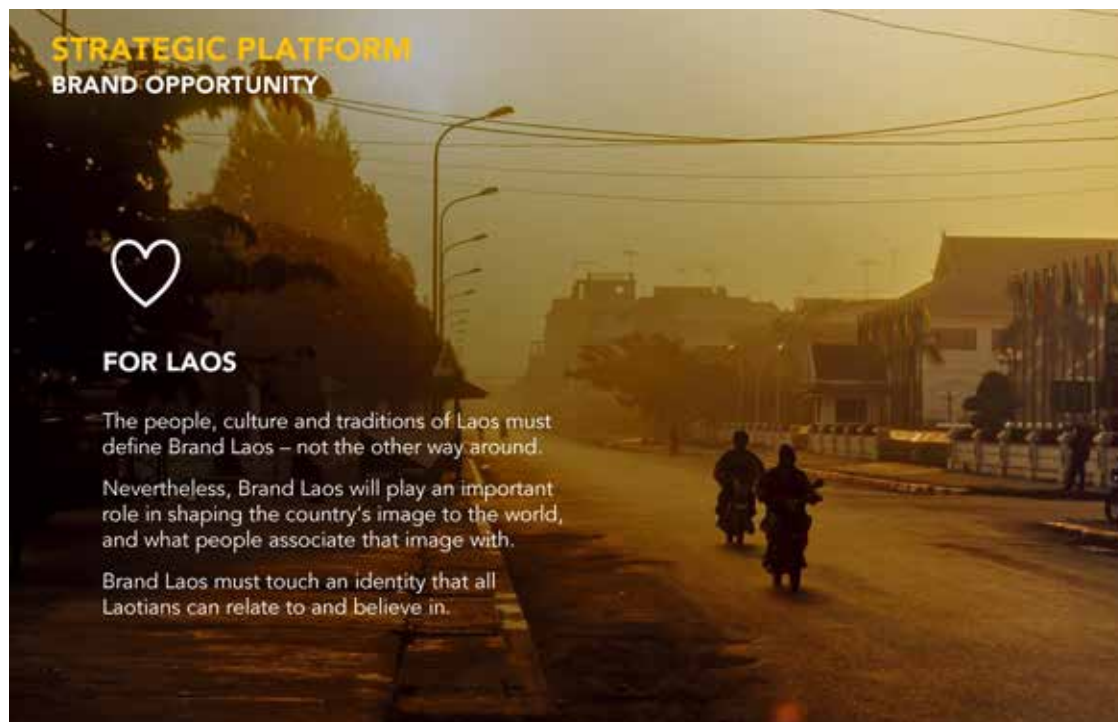
- Outward: Discover new attractions. See things and places very few others have.
- Inward: Discover yourself. Discover true beauty.

71 Produced by The Secrets of Nature. Viewed at <https://www.youtube.com/watch?v=o384Ezk3HrY&t=82s>.

5.3 BRAND CHARACTERISTICS

Four “Strategic Platforms” of the Tourism Laos brand were identified by Quo.⁷² These should serve as inspiration and direction at any time that text is being written, images selected or itineraries curated. For example, when planning a website, brochure, poster or Facebook post, these aspects should be illustrated through images, rather than focusing on attractions and tourist sites.

5.3.1 FOR LAOS



STRATEGIC PLATFORM
BRAND OPPORTUNITY

♡

FOR LAOS

The people, culture and traditions of Laos must define Brand Laos – not the other way around.

Nevertheless, Brand Laos will play an important role in shaping the country’s image to the world, and what people associate that image with.

Brand Laos must touch an identity that all Laotians can relate to and believe in.

5.3.2 RARE AND CHERISHED



STRATEGIC PLATFORM
BRAND OPPORTUNITY

💎

RARE & CHERISHED

Brand Laos will express the people’s values and regard for traditions, nature and heritage in a progressive manner.

Those who decide to visit Laos must feel that same respect and truly cherish their Laos memory – one that special and experienced only by a few in the world.

72 Laos Brand Strategy & Culture v3, ‘Strategic Platforms’ by QUO, pp43-49

5.3.3 A WAY OF BEING



STRATEGIC PLATFORM
BRAND OPPORTUNITY



A WAY OF BEING

There is a unique sense of peace and freedom in Laos. Unlike other countries or destinations around the region, there is no rush to follow hectic itineraries or check things off a to-do list when in Laos.

This does not mean a traveller is encouraged to do nothing in and just relax in Laos. On the contrary, Laos encourages travellers to fully enjoy the moment, at their own pace.

5.3.4 GENERATE CURIOSITY



STRATEGIC PLATFORM
BRAND OPPORTUNITY



GENERATE CURIOSITY

For a majority, Laos will be a new, unexplored experience. Many dream of visiting such distant, exotic, destinations. What would move someone to explore the unexplored?

Curiosity.

Brand Laos must use its novelty to generate curiosity, encouraging people to proactively seek out information and be inspired to visit Laos.

6.1 HUMAN RESOURCES

6.1.1 MICT Marketing Department

The MICT Marketing Department is responsible for ensuring implementation of the strategy. Following international best practice, much of the actual implementation will be carried out by contracted specialists and international experts.

In addition to the existing MICT staff, technical advisors and ad hoc experts on short-term contracts, the strategy requires the contracting of a Content and Community Management Team (CCMT) consisting of at least 4 members, reporting to the MICT Marketing Department through a monthly meeting coordinating mechanism.

6.1.2 Content Manager

- **The Content Manager**⁷³ is the key liaison between the CCMT and MICT.
- This person is responsible for overseeing creation, sourcing and management of text and images by Community Managers and short-term ad hoc experts, planning and managing of all online media implementation, analysis and reporting of results, and capacity building of stakeholders.

6.1.3 Community Managers

- **The Community Managers** produce and adapt digital content, including social media, website text and imagery and electronic newsletters, in line with Laos's market position and offerings, for effective marketing of Laos to their regions of focus.

In addition, the Community Managers are the “ears” on behalf MICT Marketing into their respective markets, providing information on regional trends and opportunities.

- The Community Managers report to the Content Manager.
 - International (can be same person as Content Manager)
 - Regional - Thai, Cambodia and Vietnam
 - Chinese

6.2 OVERSIGHT

The MICT Marketing Department coordinating mechanism is made up of representatives of each of the MICT Marketing Departments. The Content Manager reports to this MICT Marketing Committee monthly, providing data and analysis of the prior month's achievements and delivery, and seeks approval on the coming months' planned targets.

⁷³ “Destination marketing is a competition. If a traveler decides not to visit your destination, they are most likely going to spend their money in a competing one very similar to yours. When they're indulging in your competition, 76% of them will post on social media about their trip, making their friends more likely to also visit your rival. However, a CM is on the frontlines every day using their skills to persuade those thousands of travelers. Their audience is enormous in scale. How a CM writes, creates and engages can immediately change the mind of thousands of potential visitors, for the good or the bad. If the CM excels at their job, they are worth millions of dollars of visitor spending to your community. If they are below average, they will potentially lose millions of dollars for your community. “Cheap” community management is expensive.” - ‘Your Content Manager is your DMO's most important hire’ by John Freeman in *DestinationThink!*, May 20, 2016 via <https://destinationthink.com/content-manager-dmo-most-important-hire/>





7.1 FOUNDATIONS

It is agreed that within MICT there is “poor knowledge management.⁷⁴” Not only is there no central point for accessing tourism studies, statistics and tourism documents beyond the National Statistical report, but the many excellent sources of knowledge – assets including photographs and texts already written - have not been consolidated into a single place that is easily accessible by all within MICT and within the tourism industry.

What is required is an assessment of current assets and needs, sourcing of additional assets, centralized storage that is appropriately accessible to all, and the building of capacity on how to access and use these.

7.1.1 REVIEW EXISTING LIBRARY OF PHOTOS AND TEXT

- Assess the various sources of existing photographs that can be consolidated, and what new pictures and video need to be taken that continue to get across the destination’s USP (in line with brand expression and market position.)⁷⁵
- Create a text database that includes well-written and accurate information on Laos each province, and each of the key attractions.

7.1.2 SOURCE GOOD QUALITY INGREDIENTS

- Informal but well-structured crowd-sourcing through social media is a vital source of fresh content – both words and text.
- Formalized photographic and writing competitions⁷⁶ can be a strong source of high quality content.
- The Content Management Team will add new text and images weekly through their updating of social and other media.

7.1.3 CENTRALIZE STORAGE OF AND ACCESS TO THE INGREDIENTS

- Text and photographs should be stored in a central, searchable, secure, cloud-based, user-friendly database for easy access by all in MICT, partner organizations and the private sector.
- All material within the database must be approved and readily-available for use in all brochures, websites, posters and any other marketing material.

7.1.4 BUILD CAPACITY ON BRAND EXPRESSION/USP⁷⁷

A manual and/or workshop on how all stakeholders can get involved in the marketing of Laos should include:

- How to use the visual brand assets (logo, tagline, fonts, colors) correctly
- How to speak and write about the market position
- How to target audiences in line with the primary traveler typologies
- How to access the material in the online databases
- How to integrate private and public sector marketing so that each reinforces the other

74 Lao PDR Tourism Destination Management Plan 2016-2018, p12

75 Lao PDR Tourism Destination Management Plan 2016-2018, p19: Marketing/Promotion Activities A5

76 Lao PDR Tourism Destination Management Plan 2016-2018, p20: Marketing/Promotion Activities A6

77 Lao PDR Tourism Destination Management Plan 2016-2018, p19: Marketing/Promotion Activities A2

7.2 ACTION PLAN

The attached 2019 Action Plan and Budget is a collaborative document built on the foundations of this Laos National Tourism Marketing Strategy. It represents a shift in the directions agreed to in this strategy. That shift – particularly with regard to greater percentage budget spend on digital, and a consequent decreased percentage of spend on trade fairs and print material – must increase substantially year on year.







ASEAN: Association of South East Asian Nations
CBS: Country Branding Strategy
DMN: Destination Management Network
DMP: Destination Management Plan
DMO: Destination Marketing Organization
FIT: Free Independent Traveler
GDP: Gross Domestic Product
MICE: Meetings, Incentives, Conventions and Exhibitions
MICT: Ministry of Information, Culture and Tourism
NTO: National Tourism Organization
OTA: Online Travel Agent
PPC: Pay Per Click (advertising model)
ROI: Return on Investment
USP: Unique Selling Point
WTTC: World Travel and Tourism Council

Bibliography

'8 Tips for a Brilliant DMO Website' by David Archer in *Destination Think!*, Feb 2018. Accessed at <https://destinationthink.com/8-tips-destination-marketing-dmo-website-hall-of-fame/>

Greater Mekong Subregion Tourism Sector Strategy 2016-2025 by Greater Mekong Subregion Tourism Working Group.

