

LAOS
BRAND STRATEGY & CULTURE

QUO

OBJECTIVES

VISION

ASSETS & CHALLENGES

TARGET AUDIENCE

BRAND POSITIONING

STRATEGIC PLATFORM

BRAND CULTURE



**Countries can usefully
be understood as the
sum of their identity
and reputation.**

HOW DO PEOPLE INTERACT WITH COUNTRIES TO VISIT?

1. AWARENESS

Do audiences know the country exists?

2. FAMILIARITY

How well do they know the country and what it offers?

3. ASSOCIATIONS

What qualities come to mind when people think of the country?

4. PREFERENCE

How highly would people prefer the country?

5. CONSIDERATION

Is the country truly considered for a visit?

6. DECISION

To what extent do people follow through and visit the country?

7. ADVOCACY / RECOMMEND

Do visitors then recommend the country to his/her network after the visit?

Source: FutureBrand Country Brand Index 2014

WHERE DOES 'BRANDING' COME INTO EFFECT?

1. AWARENESS

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STATUS

- **Values.** The social, environmental and political standards that the country holds itself to.
- **Business environment.** Infrastructure, technology and ease of doing commercial activities.
- **Quality of life.** Health, education, safety and standard of living in the country.

EXPERIENCE

- **Heritage & Culture.** Historical points of interest, natural assets, art & culture.
- **Tourism.** Range of attractions and things to do, value, accommodation options and food.
- **'Made In' factor.** Quality, uniqueness and authenticity of products made in the country

'I **understand** Laos is awesome'

Tourist **Laos**

Branding

Laos is awesome
Laos is awesome
Laos is awesome

Laos **Tourist**

Advertising

'**Trust me**, Laos is awesome'

Media **Tourist**

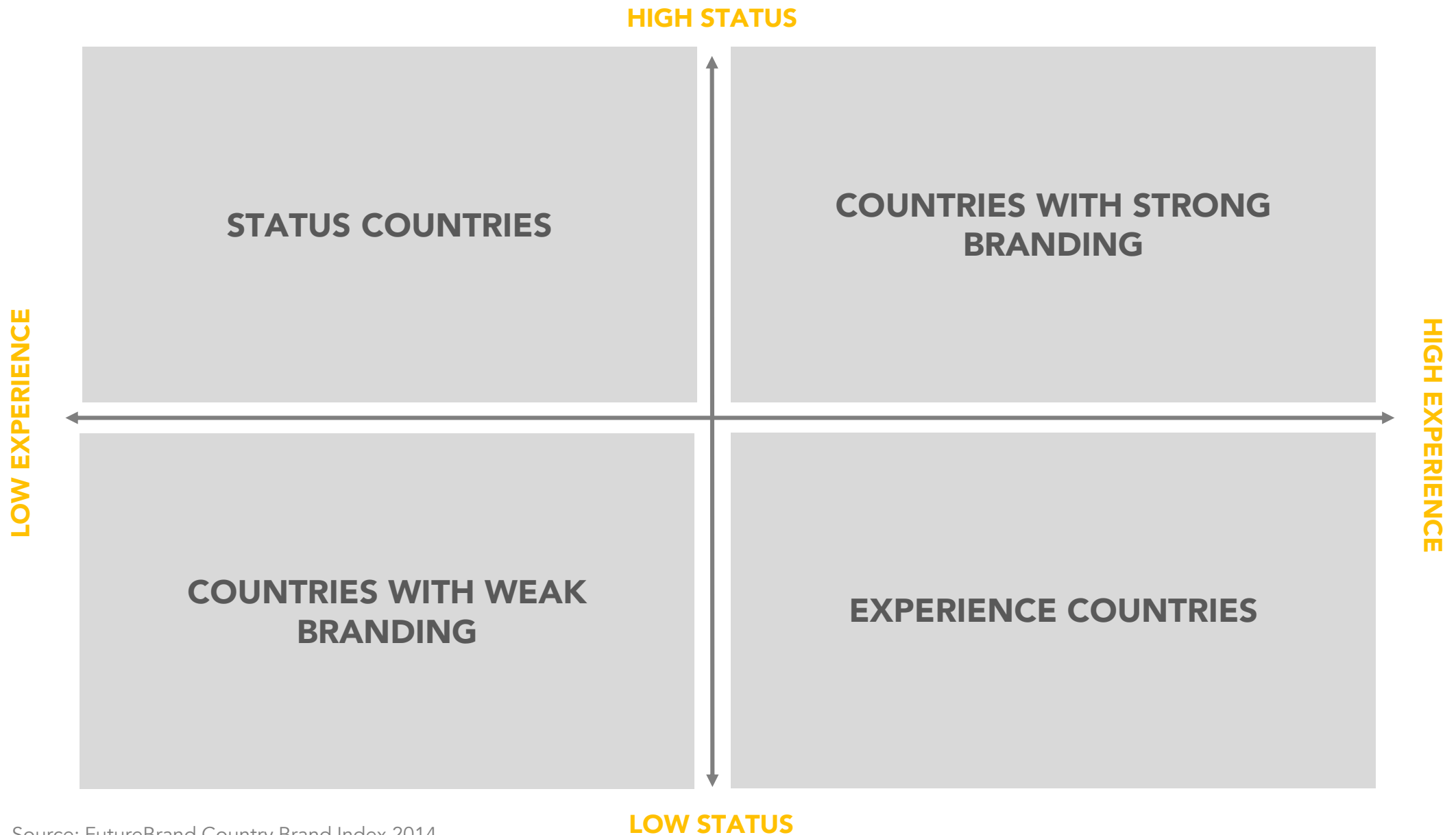
Public Relations

'Laos is awesome'

Laos **Tourist**

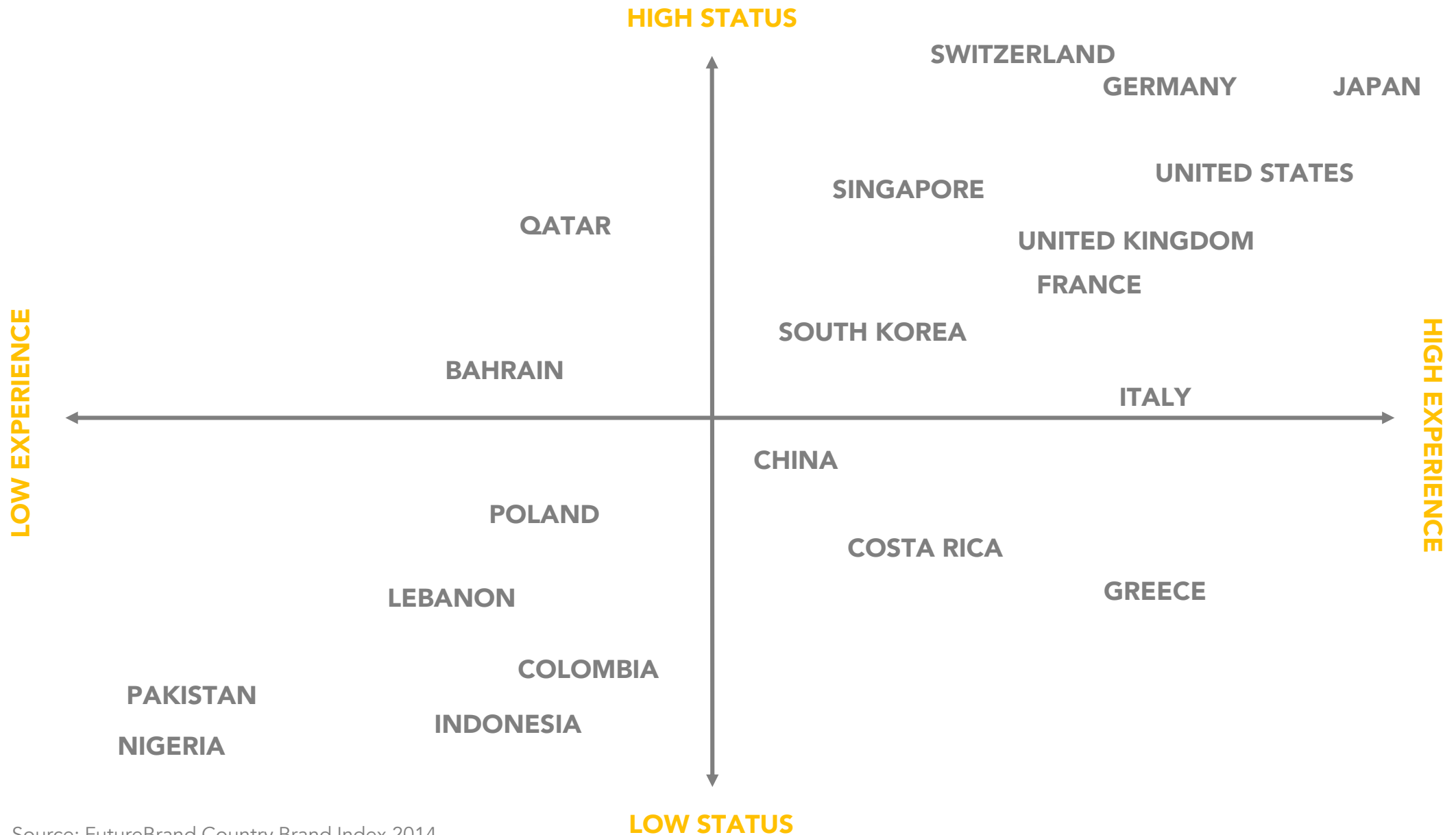
Marketing

NOT ALL COUNTRIES ARE COUNTRY BRANDS



Source: FutureBrand Country Brand Index 2014

NOT ALL COUNTRIES ARE COUNTRY BRANDS

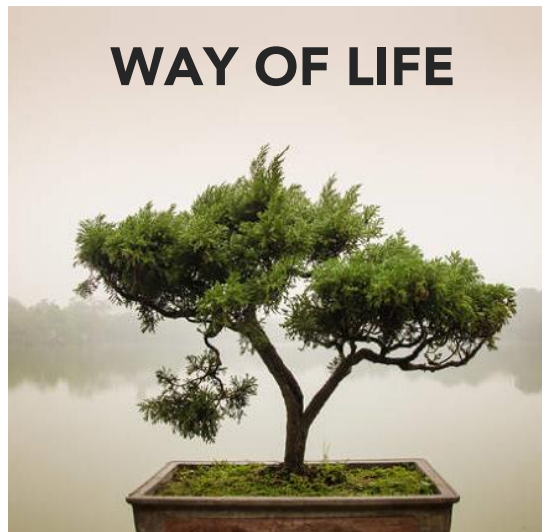
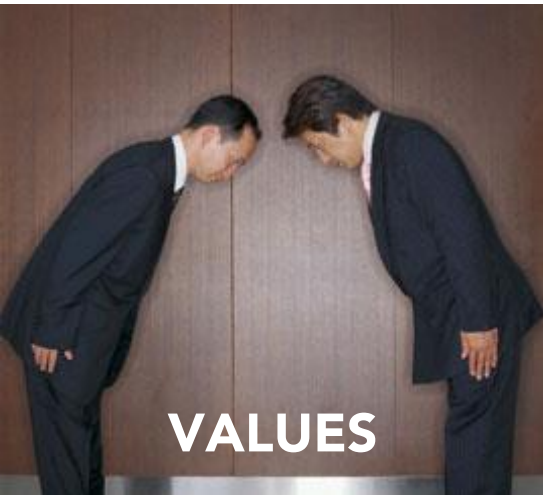


Source: FutureBrand Country Brand Index 2014

AN EXAMPLE OF A COUNTRY WITH STRONG BRAND

JAPAN

STATUS



EXPERIENCE



SONY

Panasonic

HITACHI



COUNTRY BRAND WITH HIGH EXPERIENCE, LOW STATUS

GREECE

STATUS

✗ ECONOMIC & FINANCIAL TURMOIL



EXPERIENCE

✓ HISTORY



✓ TOURISM



✓ CULTURE



COUNTRY BRAND WITH LOW EXPERIENCE, LOW STATUS

PAKISTAN

STATUS



EXPERIENCE



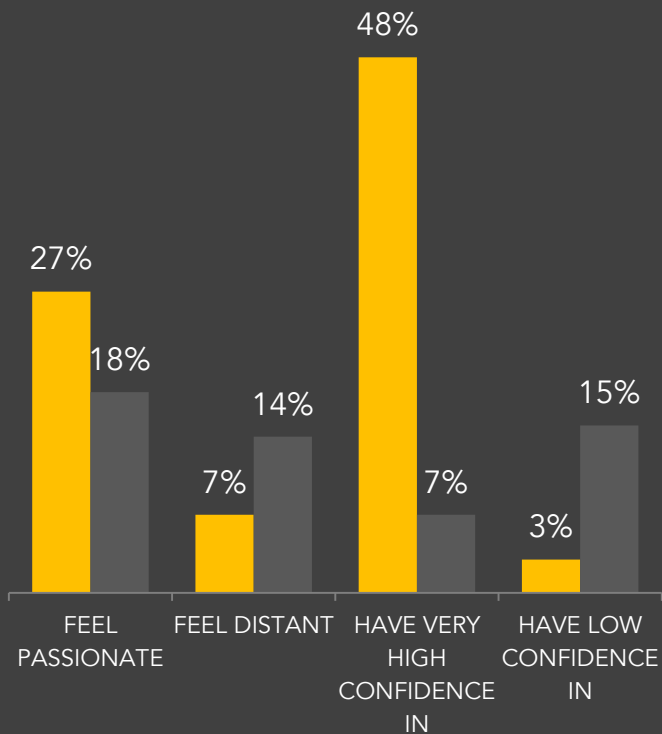
DO COUNTRY BRANDS HAVE A COMPETITIVE ADVANTAGE?



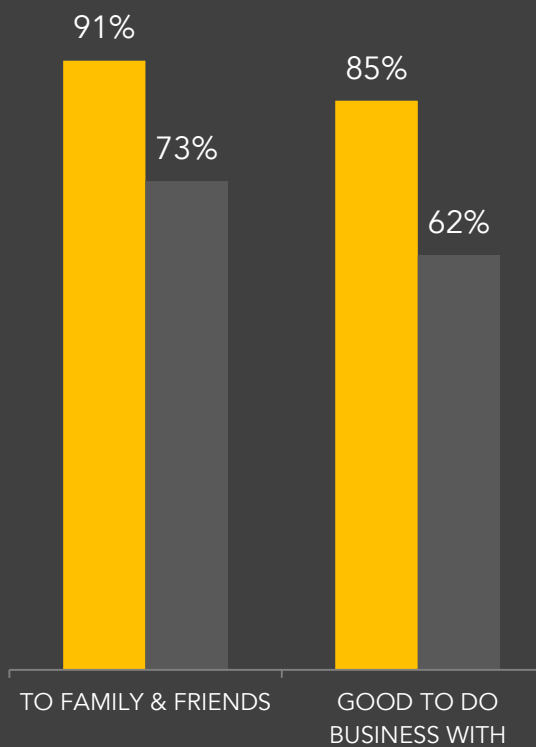
A STRONG BRAND WILL HAVE A POSITIVE EFFECT ON TOURISM

■ COUNTRIES WITH STRONG BRANDING **■ COUNTRIES WITH WEAK BRANDING**

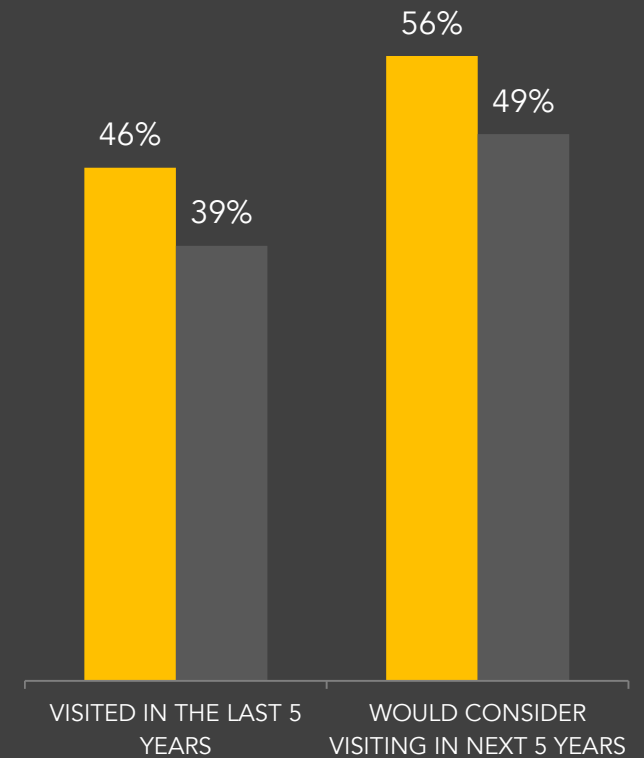
PEOPLE FEEL MORE PASSIONATE & CONFIDENT about countries with strong branding



PEOPLE ARE MORE LIKELY TO RECOMMEND countries with strong branding



PEOPLE ARE MORE LIKELY TO VISIT countries with strong branding



LAOS BRAND IDENTITY



BRANDING OBJECTIVES FOR LAOS

Based on our workshop and discussions on tourism in Laos, the following have been defined as the **key objectives of Brand Laos' strategy**



AWARENESS

Raise awareness and desirability of visiting Laos, complementing or leveraging the region's strengths



QUALITY TOURISM

Enhance depth and diversity of the country as a tourism destination (from cultural, historical, natural and social interactions)



SUSTAINABLE PROGRESS

Progress and develop as a country and destination in a sustainable, responsible way



LOCAL PRIDE

An identity that embraces the values and principles of Laos – one that all Lao people feels a sense of ownership in

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VISION

Our aspiration for the future

To be a country known for its immersive, diverse experiences while never losing its peaceful, laidback personality.

Sustained by a commitment to firm values and principles, the Laos travel experience will make the country highly desirable as a primary destination to visit.

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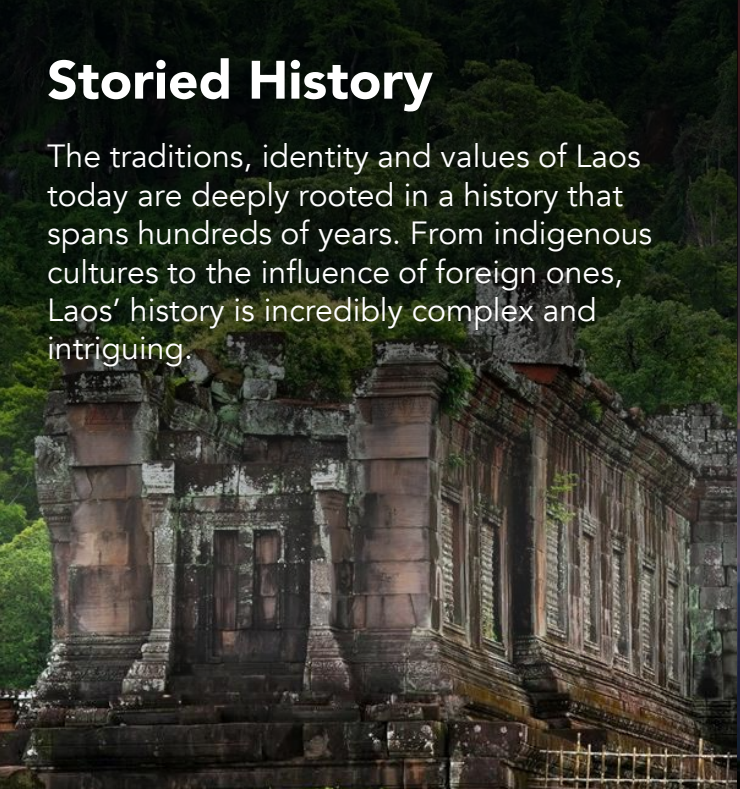




**WHAT ARE OUR ASSETS
AS A DESTINATION?**

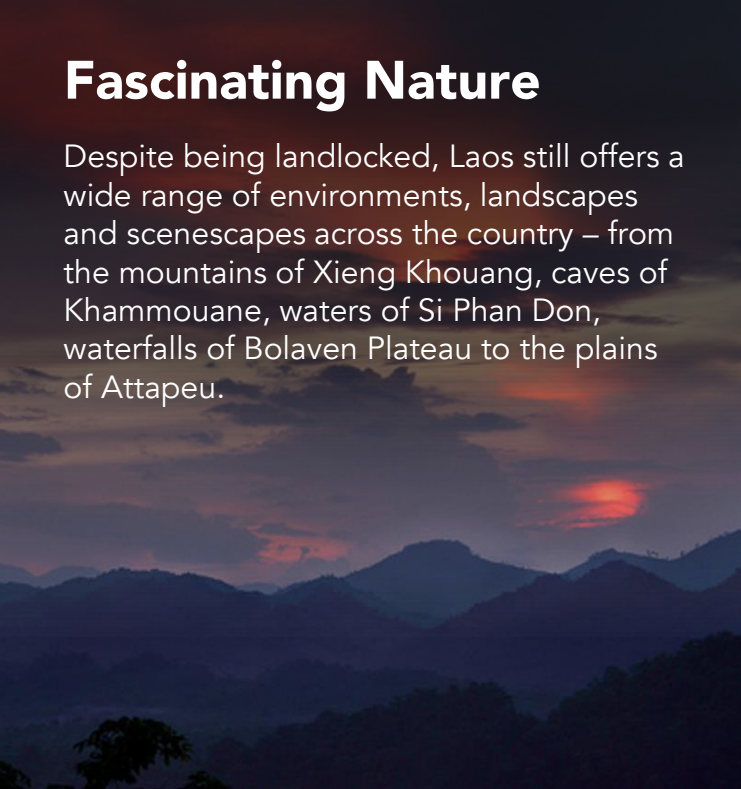
Storied History

The traditions, identity and values of Laos today are deeply rooted in a history that spans hundreds of years. From indigenous cultures to the influence of foreign ones, Laos' history is incredibly complex and intriguing.



Fascinating Nature

Despite being landlocked, Laos still offers a wide range of environments, landscapes and scenscapes across the country – from the mountains of Xieng Khouang, caves of Khammouane, waters of Si Phan Don, waterfalls of Bolaven Plateau to the plains of Attapeu.



Cultural Diversity

The undoubted main attraction for international travellers, Luang Prabang, will continue to draw tourists.

However, Laos has a multitude of other culturally significant destinations waiting to be showcased to the world.



Sense of Time

Time is perceived a different way in Laos.

Laotians have a very open and flexible approach to time, choosing to instead focus on time as moments rather than finite minutes and hours.



Community

Community spirit is a strong, defining element of Lao people and culture. Regardless of how Laos develop, this must not be compromised.

From social interactions and small celebrations to religious festivals, everything revolves around this sense of togetherness.



CHALLENGES

Infrastructure & Accessibility

Tourism infrastructure and accessibility within, and to, Laos will continue to be a significant challenge for years to come.

This includes improving quality and quantity of accommodations, airport capacity, tourist facilities and amenities, reducing red tape as well as developing talent in the tourism industry.

Public-Private Coordination

As the country continues to progress and develop, it must be done in an inclusive manner.

Both public and private sectors bring very unique expertise to the table. Greater coordination between parties must exist in order to ensure Laos is able to deliver on the expectations of both travellers and businesses.

Low awareness

Today, low awareness of Laos has resulted in the country as an “add-on” country to Southeast Asian travel itineraries.

This applies to both the country as a whole, and the destinations, attractions and activities within the country – beyond just Luang Prabang and Vientiane. This restricts Laos’ appeal as a primary, stand-alone destination to visit.

Understanding demand

In anticipation of potential tourism interest and arrivals, we need to understand what motivates them and what they are seeking, or risk disappointing them.

In addition to improving existing destinations, challenges include developing new sites, ensuring they are aligned with tourism objectives, and communicating them the right way to the right audiences.

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INTERNATIONAL TOURISM

TOP TOURISM MARKETS FOR LAOS IN 2015 (BY ARRIVALS)

ASEAN

01 THAILAND	2.3 mil (49.5%)
02 VIETNAM	1.2mil (25.4%)
03 MALAYSIA	24,000 (0.5%)
04 CAMBODIA	21,000 (0.4%)
05 PHILIPPINES	17,000 (0.4%)

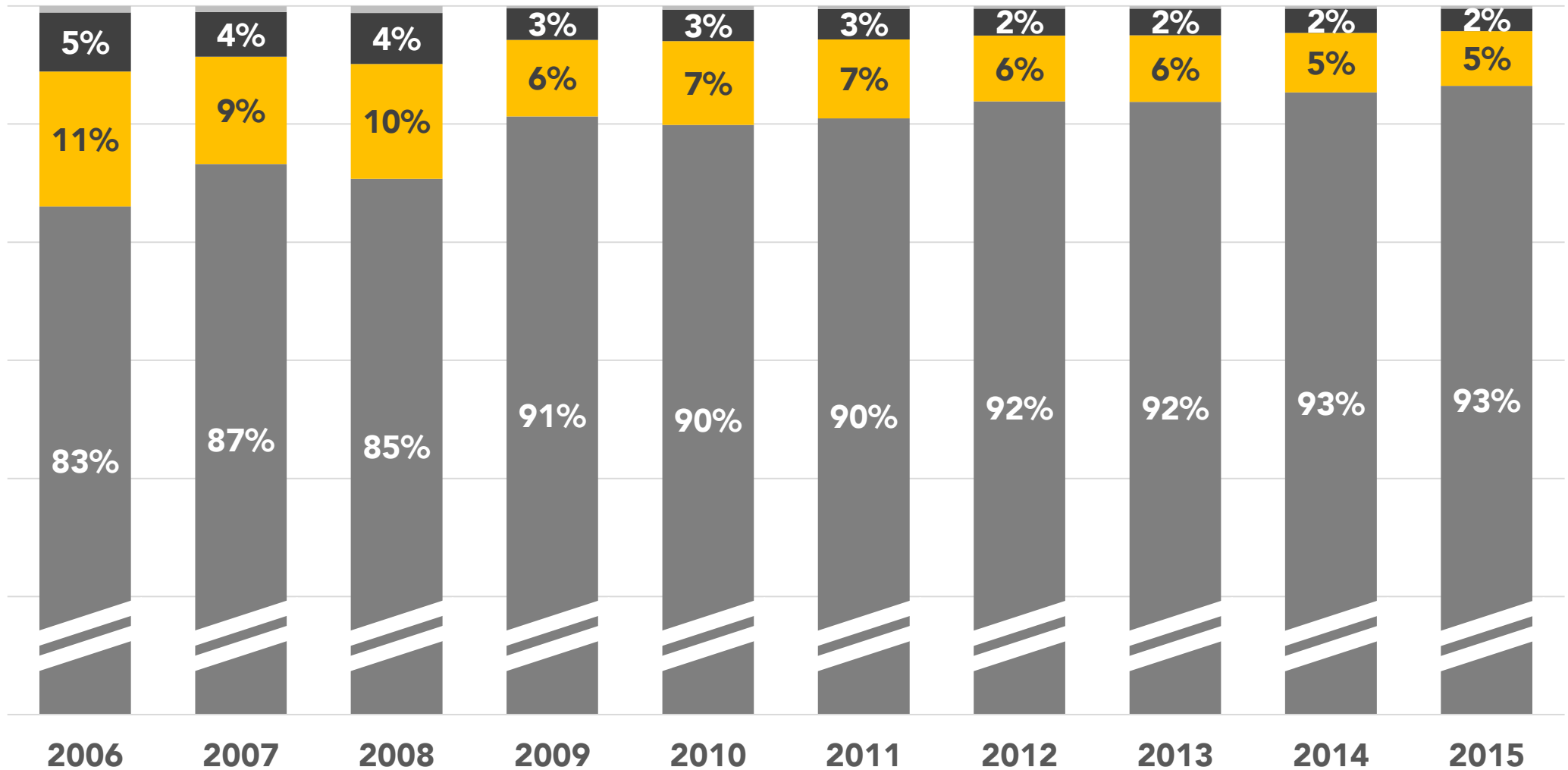
NON-ASEAN

01 CHINA	511,000 (10.9%)
02 KOREA	165,000 (3.5%)
03 USA	63,000 (1.4%)
04 FRANCE	55,000 (1.2%)
05 UK	41,500 (.9%)

Source: Tourism Development Department

INTERNATIONAL ARRIVALS BY REGION

■ Asia and Pacific ■ Europe ■ Americas ■ Africa & M.E



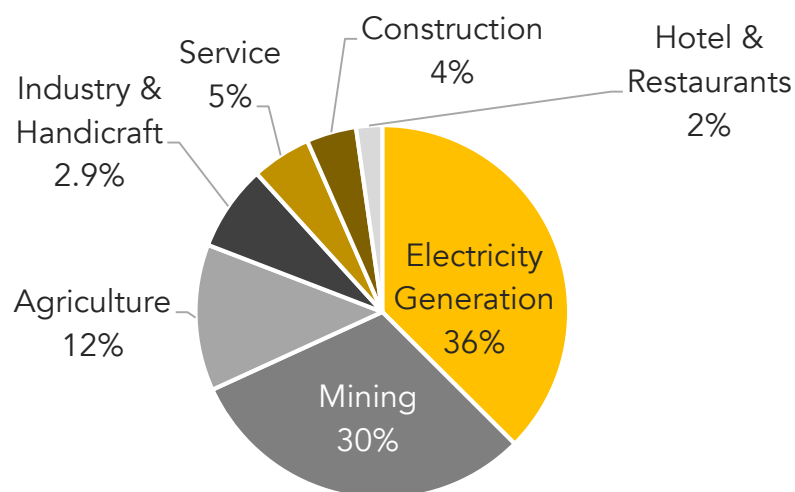
TOURISM SPENDING

Rank	2012		2013		2014		2015		'12-'15 growth
1	Thailand	1,937,612	Thailand	2,059,434	Thailand	2,043,761	Thailand	2,321,352	20%
2	Vietnam	705,596	Vietnam	910,164	Vietnam	1,108,332	Vietnam	1,187,954	68%
3	China	197,880	China	245,033	China	422,440	China	511,436	158%
4	Korea	53,829	Korea	81,799	Korea	96,085	Korea	165,328	207%
5	USA	53,380	USA	61,608	USA	61,460	USA	63,058	18%
6	France	46,903	France	52,411	France	52,146	France	55,151	18%
7	Japan	42,026	Japan	48,644	Australia	44,964	Japan	43,826	4%
8	UK	35,694	UK	41,741	Japan	44,877	UK	41,508	16%
9	Australia	33,878	Australia	35,450	UK	39,061	Australia	34,665	2%
10	Germany	23,417	Germany	29,250	Germany	29,800	Germany	31,897	36%

FOREIGN INVESTMENT

FROM 2011 TO 2015 – WHO IS INVESTING AND WHERE?

	Country	Projects	USD (mil)
1	China	185	2,537
2	Vietnam	88	1,132
3	Thailand	95	1,039
4	Malaysia	12	570
5	Netherlands	3	426
6	South Korea	30	223
7	United Kingdom	8	154
8	Japan	23	91
9	Australia	10	67
10	Singapore	4	46



IMPACT ON BRAND LAOS

As Laos continues to develop and grow as a tourism destination, it will also attract greater foreign investments.

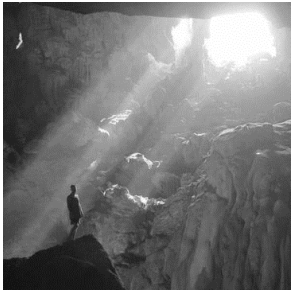
Evident in the FDI levels from 2011 to 2015, Laos has attracted significant investment from beyond ASEAN. Over time, this could correlate with increased visitors and business from these countries.

It is important that Brand Laos, as a tourism-focused entity, is aware of and manages brand associations that may arise due to economic relationships with other countries.

Source: Ministry of Planning and Investment

TRAVELLER TYPOLOGIES

NOVELTY



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

EXPLORATION



Willing to see and explore all a destination has to offer

SOCIALISING



Travelling with friends or to interact with like-minded individuals on their travel

AFFORDABLE ESCAPE



Seeking a nearby destination for an enjoyable escape within a budget

ROMANCE



Travel with a significant other, to feel close and share intimate moments

TOGETHERNESS



Travelling as a family with the primary focus of bonding and creating memories

RECHARGE



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

ACTIVE



Seeking to enjoy outdoor leisure and recreational activities of interest

INDULGENCE



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

PRESTIGE

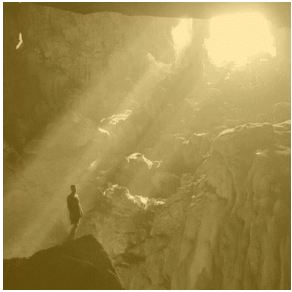


Seeks an experience that enhances and reinforces their high social standing

TRAVELLER TYPOLOGIES

PRIMARY AUDIENCE

NOVELTY



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

EXPLORATION



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SOCIALISING



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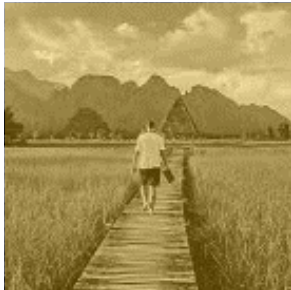
Travel with a significant other, to feel close and share intimate moments

TOGETHERNESS



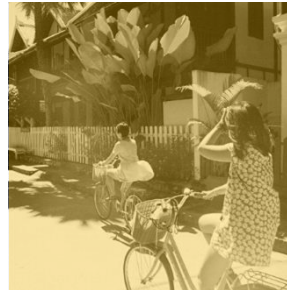
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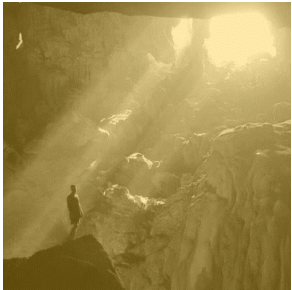


Seeks an experience that enhances and reinforces their high social standing

TRAVELLER TYPOLOGIES

SECONDARY AUDIENCE

NOVELTY



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

EXPLORATION



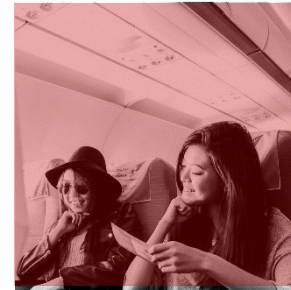
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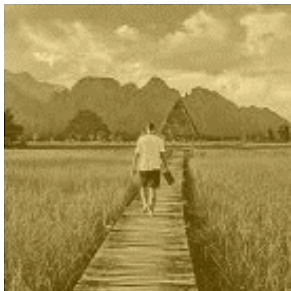
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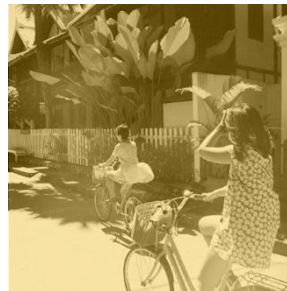
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TARGET AUDIENCE

SUMMARY



Aspirational target audience

The primary and secondary target audiences are intended to be aspirational. In the branding process, it is important to not only understand today's traveller but also consider what the ideal traveller might be.

Engaging with primary typologies the right way

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

Strategic secondary typologies

In line with the strategic objectives of developing quality tourism, Brand Laos will be positioned to strategically attract i) wider variety of and ii) understanding the needs of travellers with varying degrees of spending power.

While this will not form the core of Brand Laos, we must ensure the brand is flexible enough to appeal to this potential market.

TARGET AUDIENCE

ADDITIONAL INSIGHTS TO CONSIDER

People today travel for many reasons, each with their own set of imaginations of what their experience will be.

From the workshop and additional research, we believe these insights to be relevant for Laos moving forward

From 'seeing' to 'experiencing'

A global shift in the tourism paradigm from just 'seeing' things truly immersing in a country's culture, values and experience.

Personalization

Growing indications of travellers requesting for greater flexibility and control over travel itineraries, including a desire to explore and discover new attractions or locations – they prefer not to do the same activities as everyone else.

Niche traveller segments

The personalization trend has also seen the rise of niche traveller micro-segments such as Muslim halal travellers, culinary tourists, social media influencers etc.



**WHAT DO THESE TYPOLOGIES
AND INSIGHTS MEAN FOR OUR
TARGET AUDIENCE?**



CURIOUS EXPLORER

- Like most, the Curious Explorer **wants to see** the iconic sights and take in stunning landscapes
- **But unlike** the average tourist, **this is not what they seek** – sights and scenes don't make a lasting impression
- These travellers seek out distinct **experiences that add depth and colour** to their travel tales; what they smell, what they taste, what they touch and how they feel.
- They **travel at their own pace** – whether it is a slow and languid relaxation, soft adventure or somewhere in between.
- These travellers **want to feel a connection to the places they visit**; whether a fleeting interaction or a deeply moving encounter that changes how he or she views the world
- **In these moments, they discover** something deeply personal and memorable...they long to stir those feelings once more
- **Wanderlust** inspires them to travel & explore the world

OBJECTIVES

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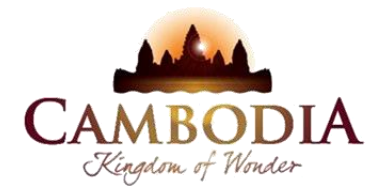
BRAND POSITIONING

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NEIGHBOURS AND THEIR TOURISM BRANDS



THAILAND



Population

68 million

2015 GDP (growth)

\$395 billion (2.8%)

Tourist Arrivals (2016)

32.6 million

World Corruption Index

101st (out of 176)

Tourism Brand



Source: World Bank, tourism authority

KEY ASSETS

- Bangkok as a primary attraction
- Diverse, picturesque destinations – history, culture, landscapes, people, food
- “Happiness”
- Global reputation for well-known attractions, nature and entertainment
- Developed infrastructure & human resources
- Medical tourism destination

KEY CHALLENGES

- Political and social stability – and its link to the Thai economy
- Increasing the quality of international visitors
- Overcoming negative association with sex tourism and lack of animal welfare protection
- Humanitarian and environmental issues attracting international press attention

VIETNAM



Population

92 million

2015 GDP (growth)

\$193 billion (6.7%)

Tourist Arrivals (2016)

10.0 million

World Corruption Index

113th (out of 176)

Tourism Brand



Source: World Bank, tourism authority

KEY ASSETS

- Nature & Environments
- Culture and unique heritage, including growing notoriety of local cuisine on international stage
- Regional diversity and multiple World Heritage Sites
- Increased accessibility and development in recent years has earned Vietnam a reputation as a dynamic, emerging destination
- Associated with positive values such as industrious and resilience

KEY CHALLENGES

- Poverty still requires attention
- Sustainable development: impact of rapid development has been felt in society and climate
- Perception of the country due to past conflicts
- Lack of consistent infrastructure, safety and dual pricing
- Ease of entry for non-ASEAN passport holders

MYANMAR



Population

54 million

2015 GDP (growth)

\$62 billion (7.3%)

Tourist Arrivals (2016)

2.9 million

World Corruption Index

136th (out of 176)

Tourism Brand*

myanmar
LET THE JOURNEY BEGIN

KEY ASSETS

- An emerging market since borders opened in 2011
- Several popular destinations (Bagan, Mandalay, Yangon)
- Religious and cultural sites, unique communities and nature
- Huge investment potential and visibility amongst foreign businesses
- Proximity to and accessibility from Thailand

KEY CHALLENGES

- Continuing publicity around human rights violations (Rohingya, child soldiers, freedom of speech)
- Development of existing destinations, creating new ones and enhancing accessibility
- Tackling nationalism and reducing rural poverty
- Perception as relatively expensive and a land of pagodas
- Ease of doing business with foreigners

* Gov't intends to rebrand
Source: World Bank, tourism authority

CAMBODIA



Population

16 million

2015 GDP (growth)

\$18 billion (7.0%)

Tourist Arrivals (2016)

4.4 million (Nov)

World Corruption Index

156th (out of 176)

Tourism Brand



Source: World Bank, tourism authority

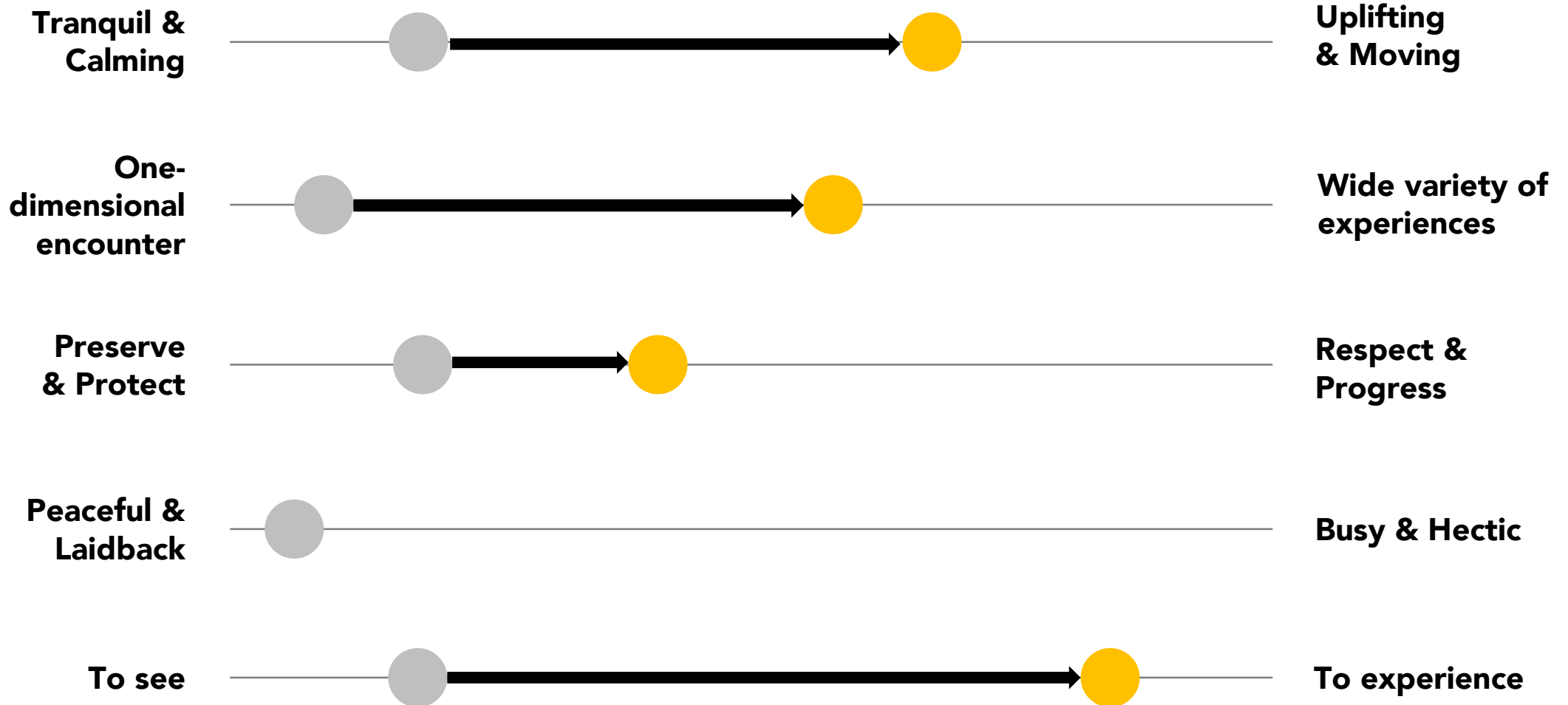
KEY ASSETS

- Angkor Wat as a global icon and the key tourism asset
- Strong cultural identity of its people as authentic, welcoming and kind
- Proximity to and accessibility from Thailand
- Siem Reap's UNESCO and "Wonder of the World" status lend credibility

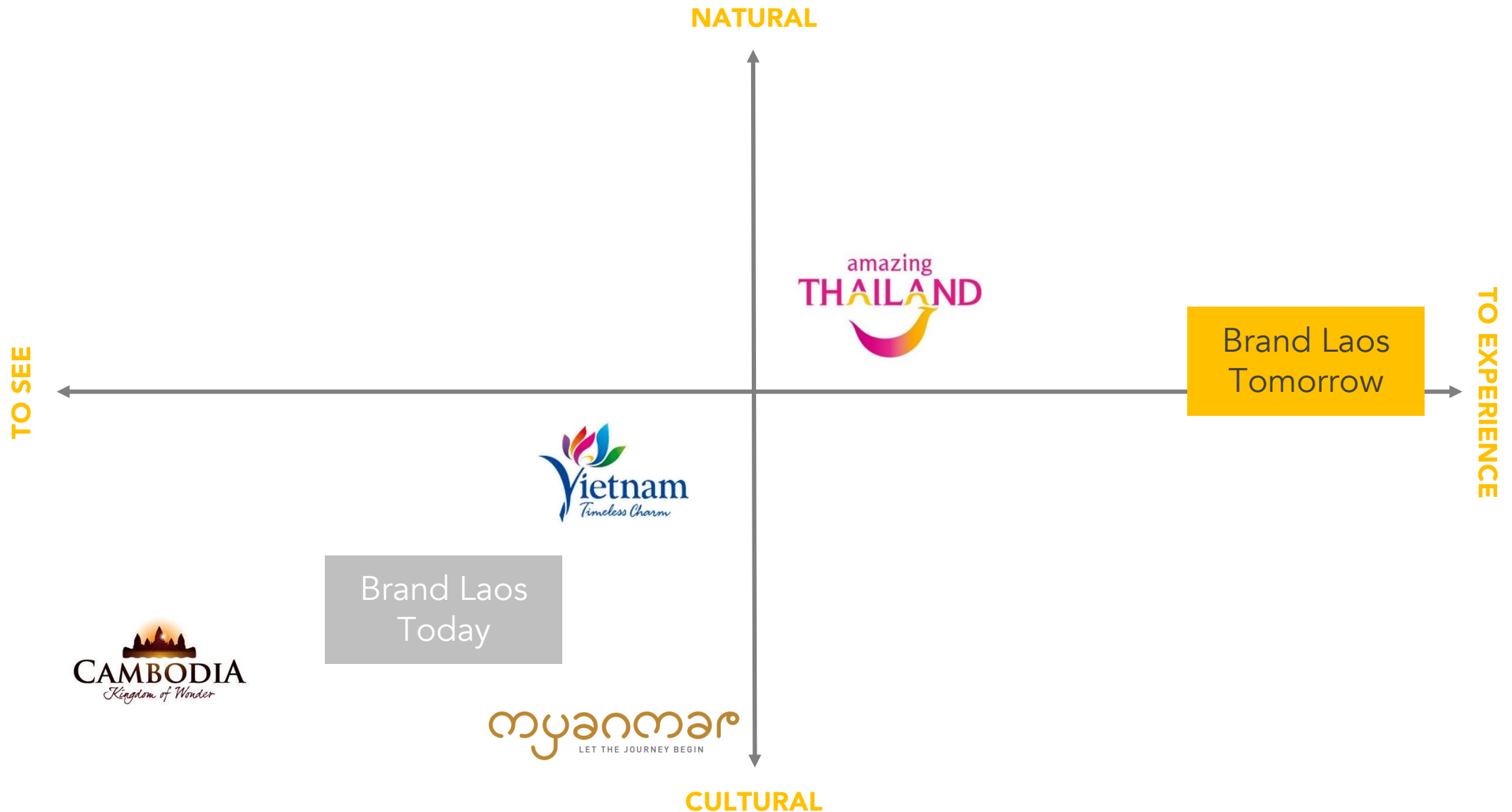
KEY CHALLENGES

- Damage to heritage sites and natural environment
- Developing destinations and attractions beyond Siem Reap and Angkor Wat
- Management of land and natural resources, environmental sustainability, and good governance
- Corruption and human rights violations continues to be a challenge

HOW CAN LAOS POSITION ITSELF FOR ITS AUDIENCE?



POSITIONING LAOS AGAINST NEIGHBOURS



POSITIONING LAOS AGAINST NEIGHBOURS



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STRATEGIC PLATFORM

BRAND OPPORTUNITY



FOR LAOS



RARE & CHERISHED



A WAY OF *BEING*



**GENERATE
CURIOSITY**

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.

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.

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.

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.



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BRAND CULTURE

OVERVIEW

TARGET AUDIENCE

Description of our customers

CONCEPT STATEMENT

Articulates the brand's emotional territory and the emotional and functional benefits customers receive by using the brand

CULTURAL TRAITS

Traits. The attributes that we want to be known for
Benefits. What the stakeholders get from using and endorsing the brand
Personality. Tone and manner

CULTURAL ESSENCE

A succinct evocative statement of the brand's ethos and point of view

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.



UNTOUCHED BEAUTY

An awe-inspiring landlocked island filled with wonder, waiting to be explored

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



REWARDING JOURNEYS

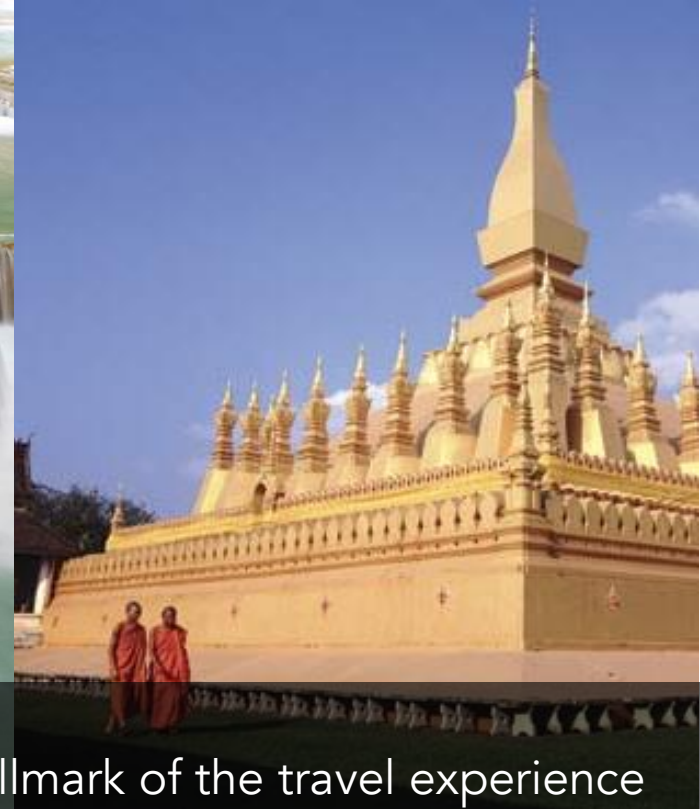
An enriching journey that is limited only by one's appetite for exploring the unknown

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

CULTURAL TRAITS

**UNTOUCHED
BEAUTY**



**REWARDING
JOURNEYS**



**UNIQUELY
LAIDBACK**



**GENUINE
KINSHIP**



CULTURAL ESSENCE OPTIONS

In addition to addressing the above traits and the actual Laos travel experience, the cultural essence should capture the key brand insight that should i) set an aspirational tone of intent for the brand and ii) appeal to that identified target audience of Curious Explorers.

Enhance the brand's aspirational appeal using 'Discovery' as a motivator

INSPIRING DISCOVERY

- Motivate and inspire travellers towards self-discovery
- Sets the tone of an inspiring country, an association currently 'unoccupied' by other brands

JOURNEY TO DISCOVERY

- In order to attain 'Discovery', one has to embark on a journey
- Sets the tone of Laos as a destination with depth, ready to be explored

DISCOVER YOUR SELF

- Directly address travellers
- Highly inspirational to those seeking self-discovery but less descriptive of Laos as a country



When you've heard it, you must see it.

When you've seen it, make a judgement with your heart.

LAOTIAN PROVERB

QUO