

TOURISM DEVELOPMENT PLAN LAO PDR 2021 – 2025

Ministry of Information, Culture and Tourism



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- ມາດຕາ 4: ຂໍ້ຕົກລົງສະບັບນີ້ມີຜົນສັກສິດນັບແຕ່ມີລົງລາຍເຊັນເປັນຕົ້ນໄປ



ຜູ້ນຳກອງ ຂາວຟັນ

Preface

The five-year tourism development plan for the Lao PDR 2021-2025 outlines the specific activities that are relevant to the tourism sector. It is part of the wider information, culture and tourism development plan for 2021-2025 and the vision to 2030. The plan is designed to guide and break through the implementation of the Lao PDR's tourism activities aimed at developing sustainable tourism and promoting economic growth. In addition, this tourism development plan provides information to the government, the business sector at the central and local levels, and educational institutions, as well as development partners and international organizations, to implement and mobilize support for the Lao Tourism Development Plan.

This Lao PDR Tourism Development Plan for 2021-2025 provides a detailed analysis of Lao PDR's tourism trends over the next five years, especially the flow of tourists, tourist demand, and changes in the tourist market during the outbreak of the Coronavirus Disease (COVID-19) from 2020 onwards. In addition, the vision, goals, main targets, and focus tasks have been clearly defined. The detailed action plan, which outlines the projects, has been developed for implementation in each fiscal year. However, the plan may still have shortcomings in terms of content. As such, the committee is willing to accept any suggestions and recommendations from stakeholders to continue to improve and revise the plan to provide a more consistent and streamlined development strategy.

We would like to express our sincere thanks and appreciation to the leadership of the Ministry of Information, Culture and Tourism for their close guidance. This development plan will be the basis for strengthening the implementation of the strategy to 2025, and strive to realize the vision of 2030, for the defined tourism sector to contribute to the country's socio-economic development.

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Part I: Overview

1. Policy Framework for Tourism

The resolution of the 10th Party Congress clearly states the need to, “develop industries that have high potential in line with a focused direction regarding efficiency, modernity, and environmentally friendliness, that can serve as pillars for the broader economic growth and competitiveness, such tourism, service industries, and other sectors.”

The government promotes tourism development in connection with the preservation of traditions, culture, nature and history. It aims to develop tourism to become one of the key economic drivers of socio-economic progress by encouraging local people to take an increasing role in tourism. In addition, the government attempts to increase the number of tourism products and attractions, and achieve diversity through developing a variety of tourism products, promoting unique local handicrafts and improving the quality of restaurants, hotels, resorts and guesthouses.

To accelerate economic development of the service industry, the government has emphasized tourism development in close collaboration with its sub-sectors such as telecommunication and transportation systems, natural resources and the environment, agriculture and forestry, handicrafts, public health, education, electricity and water supplies, telecommunications, transportation, finance and banking among others. Tourism plays an important role in sustaining the growth and development of these sub-sectors, both directly and indirectly.

The government has policies in place to promote services and the domestic sale of local goods, which aims to generate income for local people. It has also improved and developed several tourist attractions with the aim of transforming the tourism sector into a sustainable industry. Moreover, participation from local people in the tourism sector is highly encouraged. The aim of these policies is to attract both domestic and international tourists as well as investment in the tourism sector. The policies also aim to create an environment to enable and attract investment in line with the national socio-economic development plans and one-stop investment services.

2. Regional and International Tourism Trends

Tourism is a fast-growing economic sector, and plays an important role in the economy of many countries as it creates employment, generates direct and indirect income, and is a clean and environmentally friendly sector. It also sustains the development of other sectors, such as infrastructure, transportation, clean agriculture, local handicrafts, and accommodation among others.

The international tourism situation continues to steadily and strongly grow, especially among the medium to high-end markets in each region. The main reasons for this are that several countries have incorporated technology into tourism, making it easier and more convenient

for tourists to access real time information, and the ability to make informed purchase decisions of its tourism products. At the same time, many countries have adopted innovative business models, while also facilitate easier entry and exit protocols including improved visa processing, which has resulted in more international travel. In 2016, international tourist arrivals reached 1.235 billion globally, generating a revenue of USD 1.220 billion. In 2017, arrivals increased to 1.332 billion, generating a revenue of USD 1.350 billion. 2018 also saw an increase in the number of international tourist arrivals to 1.407 billion, generating a revenue of USD 1.462 billion. In 2019, international tourist arrivals peaked at 1.461 billion, generating a revenue of USD 1.5 billion.

During the same period, tourism greatly contributed to global economic growth. In 2016, global tourism revenue was worth USD 2.4 trillion, climbed to USD 2.5 trillion in 2017, and reached USD 2.7 trillion in 2018, accounting for 3.2% of the total global GDP each respective year. In 2019, tourism contributed USD 2.9 trillion to the global economy, an equivalent of 3.3%. The top five countries with the highest tourism revenues are: 1) the United States at USD 580.7 billion, 2) China at USD 403.5 billion, 3) Germany at USD 143.4 billion, 4) Japan at USD 126.3 billion and 5) Italy at USD 119.7 billion.

Between 2019 and 2020, the growth rate of international tourists dropped due to many factors that affected tourists' decision-making, such as political instability, economic downturn and the outbreak of COVID-19. According to the World Tourism Organization (UNWTO), in 2020, the number of international tourists declined by 74% globally to approximately 381 million from 1.5 billion in 2019. This is a loss of about USD 1.3 trillion in tourism revenue. Arrivals to the Asia-Pacific region in 2020 fell by 84% from 630 million to 57 million, while the global unemployment rate reached 114 million people.

According to a report by the World Tourism Organization, in 2018, the rapid growth of tourism in many countries is due to many reasons. Some of the key factors that contributed to this growth include improved quality of services and increased attractions and destinations based on demand. Additionally, there has been an increase in tourism investment through diversified partnerships. Also, the growing middle-income and senior population, as well as growing demand to travel abroad, added to this growth. Looking back 20 years, on average, a tourist traveled about once a year. Currently one tourist travels on average of about six times per year.

Many countries use state-of-the-art technology, or Smart Tourism, to develop, advertise and manage tourism. Online platforms and applications have made it easier to research tourist information, make bookings and sell travel items. In addition, domestic and international travel has been made cheaper through low-cost airlines and lower airfares. Destinations have used a variety of advertising strategies, giving travelers more choices and more purchasing power. In addition, many countries have simplified their visa application processes or exempt tourist visas, while several countries have made it easier to obtain tourist visas via online applications (e-Visas), which make travel arrangements more convenient.

One of the main challenges to global tourism is travel movement and facilitation, which accounts for 57% of all problems encountered by international travelers during their trips. In addition, safety and security issues remain at some tourist destinations. The World Tourism

Organization (WTO) has called on member states to address issues that hinder tourism at all levels and facilitate the travel of tourists, and provide timely and accurate tourist information using modern technology; increase cooperation among governments, the business sector and local people by collaborating from the development and planning stage to implementation; coordinate and prepare for emergency responses covering all circumstances in a timely manner; and increase cooperation while exchanging lessons learned and experiences with each other.

3. Tourism Resources

The Lao PDR sits in the heart of the Greater Mekong Sub-Region, with roads, water and air routes connecting to neighboring countries such as China, Vietnam, Thailand, Cambodia, Myanmar and the Republic of Korea. Attractions and destinations are characterized by traces of ancient architectural and historical features left by the country's ancestors. UNESCO world heritage sites include Luang Prabang, Vat Phou in Champasak Province, and Xieng Khouang's Plain of Jars. Other cultural attractions include That Luang in Vientiane Capital among others.

Through the end of 2019, Lao PDR identified 2,208 tourist attractions. Of these, 1,318 are natural sites, 596 are cultural sites, and 294 are historical sites. Laos also boasts a wealth of natural resources with lush forests covering up to 60% of the country's land area. There is plenty of fresh air for healthy recreational activities with 24 national protected areas, several provincial and district protected areas, cliffs, the limestone forest, and small and large caves scattered throughout the country. Waterfalls dot the landscape from north to south. The Mekong River features Khone Phapheng-Li Phi Falls, the largest by volume in Southeast Asia, in the 4,000 Islands in Champasak Province. These natural beauties have led to Laos being coined as the "Jewel of the Mekong".

Other attractions include historical sites and national monuments that serve as a living memory of the nation's history during the war to liberate the country. These include the founding government's caves of Viengxay, Houaphanh Province; Phieu Cave and Iron Mountain in Xieng Khouang Province, the historical Ho Chi Minh Trail; and remnants of the Lam Son War Site 719 in Savannakhet Province, all of which are still preserved as the country's historical sites.

The Lao population is made up of many different ethnic groups, who have different languages, arts, cultures, customs, and unique clothing. Despite the ethnic diversity, Lao people are very hospitable and welcome guests with bright smiles. At the same time, the country is generally peaceful and politically and socially stable. The infrastructure is constantly being developed and improved, and the country's economy continues to grow.

Part II: Summary of 5 Years of Tourism Development (2016-2020)

1. Tourism Development

Tourism Development Planning: Regional tourism development plans for 2016-2020 have been completed for the country's three regions including eight northern provinces, six central provinces and four southern provinces. The plan for the development, promotion and management of tourist destinations in Lao PDR and destination management plans have been completed for four provinces: Luang Prabang, Oudomxay, Khammouane and Champasak.

Of the 2,208 tourist attractions in the country, there are 1,318 natural attractions, 596 cultural attractions, and 294 historical attractions. Of these, 1,040 have been surveyed, 817 have been opened to the public, and 590 have been partially developed. The survey, allocation, and demarcation of 42 development sites have also been completed, of which 20 have completed demarcation.

In 2016, Lao PDR welcomed 4,239,047 international arrivals, and generated more than USD 724 million. The average length of stay was 7.5 days per person and the average tourism expenditure was USD 171 per person, per trip. By 2019, international tourist arrivals increased to 4,791,065 arrivals, a jump of 14% compared to 2018, while generating more than USD 917 million. The average length of stay was five days per person, and the average expenditure was more than USD 194 per person, per trip. Among the arrivals, tourists from the Asia-Pacific region increased by 14.5%, of which tourists from Thailand increased 12%, China leaped 27% and Korea rose 17%. At the same time, the target markets from Europe climbed 10%, of which France increased by 13%, Britain by 19%, Germany by 10% and Russia by 34%. Tourists from the Americas increased by 19.6%, of which the US soared 24% and Canada jumped 20%.

The increase in tourists in 2019 was a result of heavy marketing and promotion to reach both domestic and foreign markets, especially the Lao Tourism Year 2018, the Lao-China Tourism Year 2019 and the participation in international tourism fairs in many countries such as France, the UK, China and ASEAN countries. In 2020, the number of international tourists dropped to 886,447, a decrease of 81.5% compared to 2019. The steep decline in 2020 was due to international tourists only arriving during three months - January to March - caused by the heavy impact by the global COVID-19 pandemic.

During 2016-2020, much of the tourism development focus was placed on upgrading infrastructure and facilities. To date, there are 27 international checkpoints nationwide, 14 visa checkpoints, and four international airports (Vientiane Capital, Luang Prabang, Savannakhet and Champasak). Other tourism facilities that were completed include the improvement and development of 28 tourist information centers, public toilets were constructed and installed at 18 tourist sites, car parks were built at eight tourist sites, information boards were installed at 10 tourist sites, eight viewing pavilions were built, eight piers and boat landing platforms were constructed, and eight handicraft centers were built.

To date, 91 sustainable community-based tourism models were developed across the country covering 69 villages in 44 districts in 16 provinces excluding Vientiane Capital and Xaysomboun Province. Among these, five have been approved by the ASEAN Community-based Tourism Standards including 1) Konglor Village, Khounkham District, Khammouane Province; 2) Tree Top Experience, Nongluang Village, Pakxong District, Champasak Province; 3) Nalan Village, Namtha District, Luang Namtha Province; 4) The Gibbon Experience in Nam Kan National Park, Bokeo Province; and 5) Namkat Yorla Pa Resort, Xay District, Oudomxay Province.

Close to 240 hostels have been developed nationwide, covering 27 villages and 21 districts in all provinces except Vientiane Capital and Xaysomboun Province. Four villages have been certified by the ASEAN People's Hostel Standards: 1) Naduang Village, Vangvieng District, Vientiane Province; 2) Don Kho Village, Sanasomboon District, Champasak Province; 3) Don Daeng Village, Pathoumphone District, Champasak Province and 4) Vieng Nuea Village, Namtha District, Luang Namtha Province.

The government, business sector, non-profit organizations and local people have been highly involved in the overall development, with technical and financial assistance to develop many new tourist attractions throughout the country. This has resulted in Lao PDR receiving many outstanding domestic and foreign tourism awards, such as the Khonephapheng Waterfall Park and Thad Yuang Waterfall Park in Champasak Province; Namkat Yorla Pa, Oudomxay Province; Xieng Khuan Buddha Park and Champa Flower Garden, Vientiane Capital; Phou Pha Marn, Khammouane Province; and Green Jungle Park-Hoi Khua Waterfall and the Lao Buffalo Dairy Farm in Luang Prabang among others.

2. Tourism Marketing

Over the years, the Lao tourism sector has implemented a comprehensive marketing and advertising campaign targeting domestic and international markets through multimedia platforms. Lao tourism has also attended several local events and traditional festivals, and participated in national, regional and international tourism exhibitions. Several communication materials have been produced such as the publications of tourism brochures, guidebooks, magazines and other printed materials. These marketing collaterals, provided in English, French and Japanese, were distributed at national tourism expos, state meetings, international tourism conferences and other related events. Also created were a Lao guidebook; brochures; leaflets; Laos tourism map; and tourism maps of seven cities including Vientiane, Luang Prabang, Champasak and others. In addition, tourism advertising videos; posters of key tourist attractions; and souvenirs such as key chains, bags and T-shirts were also produced to help create diversity in tourism communication.

Further, the Tourism Marketing Division has led and accompanied eight foreign media companies from seven countries to film and document many important tourist sites in different provinces to promote Lao tourism through television, websites, magazines, newspapers and other media. Additionally, the national media, including the national television station Lao Star TV, TV Lao, Vientiane Times newspaper, Phathet Lao newspaper and the national radio, were invited to shoot important tourist attractions across the country. A tourism advertising spot was produced for the Lao Tourism Year 2018 and aired on the

television channel, CNN. A five-minute tourism advertising video was also made. The Tourism Marketing Division also collaborated with domestic and foreign online and traditional media by providing relevant images and information to reach target audiences. Fam trips and other tourism related media activities were organized for media and travel companies of ASEAN + 3 member countries.

Recently, the Lao tourism website www.tourismlaos.org received an upgrade with a whole new and improved look. The website is one of the key online information platforms for all tourism information on Laos. This website is linked with the ASEAN website and other relevant regional websites to promote Lao tourism to local and international markets under the “Laos Simply Beautiful” brand.

At least 27 tourism information centers throughout the country have also been developed or improved, especially in the provinces, districts, and international border checkpoints, to provide tourist information. Many of them are open during weekends and public holidays.

Lao Tourism has also been advertised in the foreign media, such as online media, websites and tourism magazines. Laos has also appeared in the International BIZ News of Germany and CNN. Collaboration with media from Vietnam, China, Japan, Thailand and the Republic of Korea has also been established. Laos further participated in several international tourism fairs. In an attempt to promote Laos to China, Vietnam, Japan, Thailand, Singapore, Germany, France and other international markets, Lao Night as well as information events were organized.

The Lao Tourism Marketing Strategy for 2020-2025 was successfully drafted through the support of the Tourism Infrastructure for Inclusive Growth Project (TIIG/ADB), Swiss Contact and the Tourism Development Project funded by New Zealand Aid.

In Lao Tourism Year 2018, there were many marketing activities at home and abroad to promote Lao tourism, including a video on CNN TV Channel and website, and in Germany BIZ magazine. Productions such as music and news for domestic audiences appeared on TV, radio, airline magazines, international checkpoints and strategic road locations between provinces. On the occasion of celebrating the 50th anniversary of the founding of Viengxay Caves, the home of the Lao revolution, special events were held, and several stakeholders were invited.

In a bilateral agreement, the governments of Laos and China co-hosted the Lao-China Tourism Year 2019, which aimed to promote people-to-people exchanges between the two countries and to attract more tourists from China and other countries to visit Lao PDR.

The tourism business sector has also assumed control and responsibility for promoting its tourism products and services through a variety of local and international media as well as attending festivals and exhibitions, both at home and abroad, which contributed to Lao PDR's overall tourism promotion.

3. Tourism Management

Management of the tourism sector plays a major role in promoting and protecting the rights and interests of individuals, entities and organizations, both domestic and abroad, which have stakes in tourism in the Lao PDR. This allows them to operate successfully and with transparency, guaranteeing that quality and standards are met. These are important factors that contribute to the development of the economy and society in general, especially in the development of tourism in Laos, to become a modern, green and sustainable industry. At the same time, tourism management encourages local participation to be able to integrate regionally and internationally in accordance with party policies and state regulations. The achievements in tourism management are as follows:

➤ Draft, revision and dissemination of legislation

- Completed drafting of legislation under the law and disseminated it in the provinces throughout the country, such as the Decree on Tourism Fund No. 119/GoL, dated 10/04/2017; Decree on Entertainment No. 315/GoL, dated 02/10/2017; and Decision on Smoke-Free Tourism No. 1154 /MICT, dated 06/11/2019.
- Completed the development of an online database system that compiles statistics on tourism investment throughout the country, including statistics on hotels, resorts, guesthouses, restaurants, bars, entertainment outlets, tour companies, tour guides and tourists.
- Completed nationwide training on the use of a database system for the staff in charge at the provincial level.
- Completed the design and development of a dedicated website for the Department of Tourism Management, which provides access to various documents related to tourism operation and management such as laws, legislation, tourism standards of the Lao PDR and ASEAN, manuals and other related information.
- Completed training on business licensing for hotels, guesthouses, restaurants and entertainment businesses for the staff of the 18 provinces throughout the country.
- Improved the standard of accommodation businesses such as hotels, resorts, and guesthouses to adapt to the current trends of the growing accommodation business.
- Created an accommodation standard guidebook for the Lao PDR, which is now available.
- Completed the dissemination of the standard book on clean and safe restaurant services and created a standardized form for clean and safe restaurants.

➤ Management of tourism businesses

- Completed statistical data collection for the accommodation sector across the country. To date the accommodation sector comprises 3,095 businesses with 53,819 rooms at 665 hotels, 23,187 rooms in 2,430 guesthouses and 30,632 rooms in resorts.
- Completed accommodation classification of 130 facilities, including 73 hotels, 57 guesthouses, seven 5-star hotels, 11 4-star hotels, 24 3-star hotels, 17 2-star hotels and 14 1-star hotels. Further, there are 11 guesthouses with a 3-Champa rating, 26 with a 2 Champa rating and 20 accommodations with a 1-Champa rating.

- In 2019, there were six convention halls, 1,664 restaurants, 164 entertainment outlets, 1,217 bars and beer gardens and 195 karaoke outlets. The numbers of restaurants and entertainment outlets compared to the previous five-year plan (2011-2015) increased by 274 restaurants and 55 entertainment outlets.
- In 2019, there were 433 tourism companies nationwide, including 391 parent companies and 49 branches. During this year, there were 1,275 registered guides nationwide providing services in 12 languages: English, Spanish, French, German, Italian, Japanese, Chinese, Vietnamese, Korean, Thai, Bahasa Indonesian and Russian. Compared to the previous five-year plan (2011-2015), the number of tour companies has increased by 152 with 61 branches and 235 tour guides.

➤ Investment management in the tourism sector

- Completed the issuance of business licenses for both local and foreign investments, which include: 670 hotels, 2,432 guest houses, 2,646 restaurants, 305 entertainment outlets and 503 tourism companies. These numbers have increased compared to the previous five-year plan (2011-2015): 155 more hotels, 521 guesthouses, 274 restaurants, 55 entertainment outlets and 193 tour companies.

➤ Addressing conflicts and problems

- Conducted site inspections and resolved issues relating to operating past opening hours; problems of noise, drugs, fights and quarrels; tour buses accidents; and deaths of tourists at accommodations and attractions. Additionally, complaints received through the government hotline were reviewed to resolve the problems that have occurred at restaurants and entertainment businesses.
- Ordered the closure of eight restaurants to be improved in accordance with the rules and regulations, and a suspension order for one hotel in Vientiane Capital.
- Resolved vehicle crash incidents which involved tour busses operated by Lao Tongnan and New Millennium Tour Companies in Muang Nan, Luang Prabang Province. Both companies were suspended for six months to resolve grievances and compensate the victims and their families in accordance with the law.

➤ Management of tourism associations and service groups

- Completed the organization of tour staff groups in provinces throughout the country.
- Completed the establishment of tour guide groups in seven provinces: Vientiane Capital, Luang Prabang, Bokeo, Luang Namtha, Xiengkhouang, Savannakhet and Champasak.

➤ Management of tourism standards and awards

- Successfully completed the evaluation and selection of outstanding tourism businesses to represent the Lao PDR for the ASEAN Tourism Standards Award. The ASEAN Green Hotel Award went to 20 accommodation facilities, seven homestay operators were awarded the ASEAN Homestay Standards, the ASEAN Community-Based Tourism Standards were awarded to five operators, ASEAN Clean City was awarded to two cities, the ASEAN MICE Venue was awarded to 10 businesses, the

ASEAN Spa Service Standards went to five operators, the ASEAN Clean Public Toilet Standards were awarded to four facilities and the Lao PDR also landed two ASEAN Sustainable Tourism Awards. The number of awards received during this period has not changed from the previous five years, since the number of awards for the ASEAN Tourism Standards is set to be the same each year.

- Completed the evaluation and selection of outstanding businesses, and awarded 127 Outstanding and Sustainable Tourism Awards of Lao PDR at the conclusion of Lao Tourism Year 2018. This marks the first award ceremony of its kind.
- Completed the awarding of certificates and star badges (3 stars) for Seng Arun Hotel in Champasak Province, and awarding Champa badge certificates for three hotels and guesthouses in Phongsaly Province.
- Completed the translation and publication of 2,000 ASEAN Green Hotel Standards and ASEAN Spa Services in Lao language, as well as disseminated these standards in targeted provinces.
- Completed the development and publication of 400 training manuals on the evaluation of ASEAN Green Hotel Standards and ASEAN Spa Services at the national and provincial levels, and provided training for national and provincial trainers in the targeted provinces.
- Completed the creation and publication of 1,000 handbooks on accommodation standard of Lao PDR, 1,000 handbooks on tourist bus service, 1,000 booklets on tourism signs and information board installations in the Lao PDR, and 500 manuals on how to use the tourism statistics database. In addition, workshops were held to disseminate the handbooks in the targeted provinces. Moreover, 200 video discs (VDO) on the Lao PDR Hotel Standards were produced as an additional communication channel to help accommodation businesses in Lao PDR to become more aware and increase their understanding of the standards.
- In terms of tourism management and administrative work, the department has collaborated with the provincial authorities and businesses to collect information on tourism sites, consulted and discussed proposals submitted by the private sector for the government to solve, inspect, monitor and evaluate the respective sites in accordance with management policies.
- Collaborated with provincial authorities to improve the quality of services of tour guides and passed the draft rules for tour guides in Bokeo and Luang Namtha Provinces.
- Organized training for tourism businesses' statistical database system in Luang Prabang and Savannakhet Provinces.
- Provided training on service quality management for executives and managers of tourism companies in Vientiane Capital and Champasak Province.
- In general, the hospitality operators have paid attention to the implementation of various legislations and have taken the lead in implementing specific regulations for their own operations.

- Worked with the National Technical Committee, the Hotel, Restaurant and Tourism Services Unit, the Department of Standards and Measurement and the Ministry of Science and Technology.
- Coordinated with relevant parties at the central and local levels to solve problems related to tourism management.

4. Tourism Human Resources Development

In terms of human resource development, the focus has been aimed at improving short-term training courses, training trainers, and organizing short-term training on various subjects for the government and the business sector in the tourism sector:

- Developed new and updated 10 short-term training courses, including tourism marketing for small businesses; clean and safe food services; service quality and customer service courses for management and service staff; courses on sales and promotion skills; service preparedness for the Chinese market; courses for national, provincial and local guides; and training courses specifically for renewing guide permits.
- Conducted training for 23 ASEAN Master Trainers and Assessors; 116 ASEAN National Trainers and Assessors; 12 national and 58 provincial trainers for front of house, food and beverage and housekeeping at accommodations; and 18 guides trainers for caving.
- Conducted 42 short-term training sessions on various tourism related topics for hotel, guesthouse and restaurant businesses across the country, with a total of 1,197 participants. To date, more than 2,000 national tour guides, cultural heritage guides, provincial guides and specific area guides have been trained.
- Implemented the ASEAN Mutual Recognition Agreement on Tourism Professionals with the following results: completed the training of 23 ASEAN Master Trainers and Assessors, trained 367 ASEAN National Trainers and Assessors, and disseminated Mutual Recognition Agreements for ASEAN Tourism Professionals for over 3,000 participants.
- Translated and published the ASEAN Tourism Vocational Training Manual in Lao language with 120 standards.
- Completed the design and development of a website for the Department of Tourism Training (www.imct-training.gov.la) to provide access to trainers on the ASEAN Tourism Vocational Training Manuals, tour guide training courses and information on activities related to tourism training.
- Signed three memorandums of understanding regarding international cooperation on tourism human resource development with regional universities: 1) Jiangsu University of Information Technology, China; 2) Khon Kaen University, Thailand; and 3) Yunnan University of Tourism, China.

5. Green Growth Development Goals

The Sustainable Development and Green Growth initiative that is linked to tourism development goals states Lao PDR's tourism must assert quality and be of good standards in accordance with the green and sustainable strategy to compete regionally. Lao tourism took the initiative in organizing and hosting the first Sustainable Tourism Solution Expo to encourage industry partners to take more active roles in exploring and exhibiting the latest trends, insights and technology in sustainable tourism and hospitality practices. The first expo was held in Luang Prabang in 2018 and the second was held Vientiane in 2019.

Much attention has been paid to the implementation of the ASEAN Tourism Standards in line with the green growth strategy for the tourism sector. To date, nine standards have been completed: ASEAN Clean Tourism City Standards, ASEAN Green Hotel Standards, ASEAN People's Hostel Standards, ASEAN Community Based Tourism Standards, ASEAN Traditional Massage Standards, ASEAN Clean Public Toilet Standards, Lao PDR Tourism Ranking Standards, Lao PDR MICE Venue Standards and Tourism Company Standards using the GSTC criteria.

6. Regional and International Cooperation

Emphasis has been placed on regional and international cooperation and integration, with a focus on bilateral and multilateral cooperation to mobilize technical assistance and funding to support the implementation of tourism activities. Many regional cooperation frameworks have been put in place for the tourism sector, which allows linkages between neighboring countries as well as other countries within the region. These cooperation frameworks include the Cambodia-Laos-Myanmar-Vietnam Cooperation Framework (CLVM), Cambodia-Laos-Vietnam (CLV), and Economic Cooperation under the Cooperation Framework (ACMECS).

The Lao PDR has been a leader in the implementation of various agreements by the ASEAN Tourism Ministers with a high degree of ownership and progress. More specifically, the Lao PDR was in charge of the implementation of eight ASEAN Tourism Standards: ASEAN Clean Tourist City Standard, ASEAN Homestay Standard, ASEAN Community-Based Tourism Standard, ASEAN Public Toilet Standard, ASEAN MICE Venue Standard and ASEAN Sustainable Tourism Standard.

In addition, Laos has cooperated with the framework of the World Tourism Organization (UNWTO). This includes the development of infrastructure to promote tourism with assistance from the Asian Development Bank (ADB), which focuses on four target provinces: Vientiane, Oudomxay, Luang Prabang and Champasak. The project aims to develop and improve small tourism related infrastructure, human resources and tourism standards with a total value of USD 40 million. The Lao tourism development activities have also received funding from the government of New Zealand (NZaid) to develop small tourism infrastructure and promote sustainable community-based tourism in the four target provinces of Bolikhamxay, Khammouane, Luang Namtha and Xieng Khouang with a total project value USD 3.4 million. Other technical cooperation and assistance was through the Regional Economic Integration of Laos into ASEAN (RELATED Project-GIZ) with the focus on the implementation of some ASEAN Tourism Standards.

7. Implementation of the Investment Plans in Tourism

7.1 Investment from the State Budget

During the five years between 2015-2020, there were 17 public investment projects in tourism with a total value of 189,801 million Lao kip, of which 179,657 million kip was from foreign aid. Some public investment projects have been completed, but there were payment disbursement delays. The remaining projects will be transferred to the next five-year plan.

7.2 Investment Financed by International Development Organizations (ODA)

Three projects were financed by international development organizations:

- Tourism Infrastructure for Inclusive Growth Project Loans from the ADB (Phase 1) with a total value of approximately USD 43,570,000. Of the total, the contribution of the Government of Laos was approximately USD 3,570,000 for the implementation period 2015-2020.
- Tourism Infrastructure for Inclusive Growth Project Grant from the ADB (Phase 2) with a total value of approximately USD 47 million for the implementation period 2019-2023.
- Community-Based Tourism for Sustainable Development Project, Phase II from the Government of New Zealand is a grant project with a total value of approximately USD 3.4 million for the implementation period 2016-2020.

7.3 Private Investment – Domestic and International

The tourism sector has received grants and loans from several international organizations, especially from the ADB's Tourism Infrastructure for Inclusive Growth Project.

At present, domestic and foreign private investment in tourism development throughout the country includes 109 projects, with a total value of about 405,902,627,042 kip and USD 241,312,594.

8. Strengths, Weaknesses and Lessons Learned

8.1 Strengths

- The 8th National 5-Year Socio-Economic Development Plan and the 5-Year Development Plan of the Ministry of Information, Culture and Tourism (2016-2020), formed the basis for carrying out all works related to tourism development. Carrying out the plan was also due to the close guidance from all levels of authorities, especially the leadership of the Ministry Information, Culture and Tourism.
- All employees put loyalty to the country above all and followed the guidance and leadership of the Party and the state. Employees also have high responsibility for their work. They are innovative and continuously develop new skills and knowledge to increase personal performance and competence on the job.
- Lao tourism has a good working relationship and collaboration between the central and local level authorities.

- There is a budget allocation by the government for each year. In addition, the sector has received technical assistance and funding from development partners and international organizations to organize the implementation of tourism activities.

8.2 Weaknesses

- There is still insufficient budget allocation to meet the needs of current activity implementation, especially for the development of facilities and infrastructure. Hence, some activities could not be implemented and achieved as planned.
- Despite the continuous training, the number staff at the supervisor level remains limited, which impacts the output quality of activities implementation. Furthermore, some staff have not fully adhered to the guidelines and policies of the party-state, while some lack the ownership and were not active in carrying out assigned tasks.
- While there has been progress, there are still many tourism facilities and infrastructure that requires improvement or new develop, such as tourism site signs, interpretation signs, information centers and public toilets. Road access to many tourist sites is still difficult, with some only accessible during the dry season. Overland routes and direct flights for many international target markets are limited.
- There are still some management gaps in decentralization of power between the central and local levels, which do not align with the law and the growth of tourism. This has resulted in inconsistent coordination between the central and local authorities, the public and private sector, and unclear responsibilities, which has an adverse effect on the implementation of many tourism activities.
- The management and administration of tourist sites are not yet systematic. Tourism activities lack diversity, while service quality and standards are not as good as they should be.
- Environment protection around many tourism sites that is in line with the green growth initiative could not be carried out as well as it should.
- The standardization of tourism sites has experienced some delays. There were also some delays in the implementation of other activities. For example, the number of survey-allocation and drafting of tourism sites completed were lower than planned. This has caused land encroachment of many tourist sites countrywide.
- The development of other economic sectors has a direct impact on some tourist attractions, such as drilling, blasting of natural rocks in some provinces, construction of dams that did not meet quality standards, the use of hazardous chemicals, and illegal land encroachment in tourism designated areas for agricultural.
- The formulation, amending and dissemination of laws and regulations under the law on tourism is not sufficient to meet the sector's needs.
- The collection of service revenues and fees for tourism has not been uniform and encountered difficulties. The management of service prices is not yet strict, resulting in leakages.
- Tourism services at international checkpoints and between provinces still needs improvement, especially in facilitating the flow of tourists and monitoring, inspecting and providing strict measures against illegal tourism business operators.

- The division of management between the central and local levels is not in line with the current growth of the tourism sector, making implementation difficult.
- Community-based tourism has not been fully exploited and promoted to match the potential of what the country has to offer. Campaigns for raising tourism awareness for local communities have not been carried out continuously and consistently.
- There are still only a small number of experienced and professional tourism business operators, resulting in generally low service quality. The investment in the tourism sector does not match its growth.

8.3 Lessons Learned

- The Party Committee of the Ministry has provided guidance and served as a role model in the implementation of work in accordance with the principles of modernization.
- Pay attention to training and development of staff to support the growth of the sector and to ensure the availability of qualified future leaders.
- Draft and improve laws and regulations in response to the needs of the tourism sector for the next phase with high efficiency and uniformity countrywide.
- Attract assistance from international organizations and development partners that can increase contribution to the development of tourism.
- Strategically plan and implement work with a clear timeline, budget and division of responsibilities for the various stakeholders, ensuring success in the implementation of projects assigned.
- Encourage and promote good relationships and collaboration between the central and local authorities and businesses within the tourism sector to strengthen and implement hidden potentials that contribute to the development of the nation.
- Improve the coordination mechanism and management efficiency by modernizing to ensure a timely response and good flow of communication. At the same time, it is necessary to improve the system and coordination to enhance competitiveness to attract investment from the public and private sectors, both domestic and foreign.
- Improve collaboration and consultation between the public and private sector on technical matters relating to tourism development.
- Focus on improving any outstanding issues in the standardization of tourism in Lao PDR. Additionally, complete and improve the quality of tourism infrastructure as well as develop new tourism routes and products to attract more tourists.

Part III: Tourism Development Plan for the Next Five Year (2021 – 2025)

1. References

- Resolutions of the 11th Party Congress and resolutions from the 11th Party Central Committee.
- The Prime Minister's Order No. 05/PM, dated 21 May 2019, on the formulation of the Ninth Five-Year National Socio-Economic Development Plan (2021-2025).
- The Decree on the Organization and Operation of the Ministry of Information, Culture and Tourism No. 95/PM, dated 9 March 2017.
- The 2025 Strategy and Five-Year Information, Culture and Tourism Development Plan (2016-2020) and Vision to 2030.
- The 10 year National Green Growth Strategy of Lao PDR (2016-2025) and Vision to 2030.

2. SWOT Analysis

2.1 Strengths

- The Lao PDR has peace, political stability, continuous economic growth, social security and good order.
- Infrastructure has been developed and improved to a good level, with transport links between provinces and districts. Additionally, there are linkages between neighboring countries and the region.
- Lao PDR has an abundance of natural, cultural and historical sites that are diverse and unique. At the same time, there are many forests and parks, mountains, cliffs and caves throughout the country.
- Culturally, Lao PDR is made up of many ethnic groups living together peacefully. The country also possesses its own unique culture and traditions with its own written language and national clothing. Lao people are friendly and hospitable, and resourceful. Local people adhere to the 12 Customs and 14 Traditions. There are also traditional festivals throughout the year that define the characters and lifestyles of the people. Key cultural attractions that are of ancient architectural value include Luang Prabang World Heritage City, Vat Phu Champasak World Heritage Site, Thong Hai Hin (the Plain of Jars World Heritage Site), That Luang, That Sikhottabong and That Ing Hang among others.
- There are many historical sites that are of significance to the nation as well as the world, which has been inscribed in the aftermath of the War for Independence. Among these sites are the Viengxay Caves, Houaphan Province; Piew Cave and Phou Kood Mountain, Xieng Khouang Province; the Ho Chi Min Trail; and other war remnants.
- The government has policies in place to promote investment by opening opportunities for both domestic and foreign investors to develop a full range of tourist attractions

and destinations, a variety of products and improved quality services to attract more tourists to the country.

2.2 Weaknesses

- Infrastructure and tourist facilities received inadequate improvement or development. For example, access to many tourist sites is still difficult, many places are accessible only during the dry season, and land routes and direct long-haul flights are limited. Many outstanding tourist sites have not been adequately improved. There is a lack of interpretive information for tourist attractions, lack of systematic management and operation of tourist attractions, substandard tourism activities and lack of diverse handicraft products. Many attractions and destinations still face issues with maintaining cleanliness. The development of tourism routes in some areas do not receive close coordination among the government, business sector and local people. The development of some sectors of the economy has affected the environment of tourist sites, such as the drilling and blasting of natural rock formations in some provinces and at other attractions.
- Laws and legislation are not enough to meet the needs of the tourism sector. Existing legislation has not been widely disseminated, which has led to a lack of understanding, coordination, and difficulties in the implementation of certain tasks, such as the collection of fees and setting up uniform fees. Moreover, the ability of tourists entering and exiting the country still requires improvement to facilitate a better flow. There is also a lack of monitoring and inspection of illegal tourism operators and lack of strict standards against violators.
- The surveying, allocating and planning for the development of tourist sites has been slow compared to the target, causing many tourist sites throughout the country to be encroached upon.
- Participatory and community-based tourism have not been enhanced to match the potential of the country. Many local communities do not have a good understanding of the benefits of tourism, and lack service skills, knowledge in small business operation and management skills and knowledge of the potential markets. In addition, the potential of the local culture, traditions, traditional dress, and unique food to serve tourists has not been fully explored.
- Advertising to attract tourists from the region and internationally mainly emphasize quantity over quality. Advertising lacks diversity and advertising channels being used have not maximized market reach. The use of digital technology in marketing is still limited. The promotion of traditional festivals in each province has not been systematic and ongoing.
- The availability of highly specialized human resources in tourism is insufficient both at the central and local levels. There is a lack of market research on the target groups, leading to the development of products that do not match the needs of the markets. While there has been a growing number of guides, the number of foreign language guides required to serve the target markets is still limited. As a result, there has been a prevalence of illegal foreign guides.

- There is a limited budget to meet the development, management, promotion and personnel development needed in the tourism sector.
- Facilitation of entry and exit at some international checkpoints is still slow. The inspections of tourist busses at many points do not conform to a standard rule and remain inconsistent. Taking advantage of consumers, such as price hikes, continues to be an issue, especially at festivals and during special events. The Lao PDR food and service prices are still high compared to its neighboring countries.
- Environmental protection and maintaining cleanliness at tourist attractions and destinations remain an on-going issue.

2.3 Opportunities

- The sub-regional tourism development strategy promotes the integration of tourism between member countries along the economic corridors. This is an opportunity for the Lao PDR to attract more tourists to visit due to its location in the heart of the Mekong Sub-Region.
- Global and regional tourism is currently growing at a rapid pace, and there is stronger integration in the context of globalization. The Chinese market may become the country's top source market once the Lao-China railway network is open.
- The economic integration policies of the ASEAN countries and the Mekong countries will be an important factor that will help tourism in the Lao PDR to continue to grow. At the same time, increased opportunities for international and regional cooperation will allow the Lao PDR to play a larger role in the international arena.
- The Lao PDR is increasingly recognized by tourists from all over the world since it has recently won many ASEAN and reputable international awards, which were widely publicized.
- Lao PDR is located next to China, which is the world's largest tourism market with top spending power.

2.4 Threats

The development and promotion of tourism activities are not without challenges that directly and indirectly affect tourism within the country.

- International terrorism and the spread of diseases such as the Coronavirus (COVID-19) will regionally and globally impact the tourism industry.
- Trade disputes between the superpowers have contributed to rising global oil prices, leading to higher prices of consumer goods, which directly affects the prices of services in the tourism sector. This results in higher prices for food, beverages, accommodation and tourism activities.
- The division of management between the central and local levels is not in line with the laws and the current growth of tourism. This has caused inconsistencies in the organization, operation and coordination between the central and local authorities, and between the government and the business sector, which has a significant impact on the industry.

- The Lao PDR is being developed into a transport hub in mainland Southeast Asia. However, due to limited tourism facilities and attractions that meet the needs the market, it remains merely a transit destination. Despite the increasing number of tourists travelling through the country, the benefits have not been fully realized. This is one of the key challenges for Lao tourism.
- There is more diversity in terms of tourism products and services in neighboring countries, which have a higher quality than the Lao PDR, coupled with their systematic marketing and promotion strategies.

3. Tourism Trends Analysis

3.1 High-end international tourists, who travel in large groups, mostly visit Luang Prabang, Vientiane and Champasak. They are mostly from Europe. Their tour program in the region usually includes Laos as one of the destinations. The tours are usually booked through a tour company. Tourists usually travel in groups of nine to 25 people. They are aged between 35-70 years old and stay between four to 10 days with the average daily expenditure of about USD 123 per person. These groups travel year-round, however the peak period is between November and March. The mode of travel is mostly by bus accompanied by tour guides, who will take care of all their needs. They normally stay at 3-star hotels or better and will usually eat at their accommodation. Due to the large group sizes of relatively older tourists, there is little time for activities that would provide a local experience. They usually require good access facilities to tourist attractions. At the same time, they need highly knowledgeable and experienced tour guides that can provide in depth information about each destination.

However, catering to this market group is still challenging due to many factors such as the limited availability of qualified hospitality professionals and staff, and a limited number of foreign language tour guides, who speak French, Spanish, German and Italian. Currently, available guides are mostly senior tour guides, as there are no plans to accommodate young foreign language tour guides. Facilities that cater to seniors at attractions and destinations are still limited, and tourism information and interpretation materials still need further improvement.

3.2 High-end international tourists, who travel in small groups, are mainly from Europe. They make their bookings with tour companies and usually travel in a group of two to eight people. Their ages range between 35-70 years old. The average length of stay is four to 10 days with the average daily expenditure of about USD 150 per person. This group travels with family and friends, and can often be seen all year round. Their mode of transport is usually by bus, and they stay at accommodation that is 3-star or more or boutique hotels that offer unique décor. They seek activities that allow them to have local experiences. They require relatively good facilities to access tourist attractions. They also require knowledgeable and experienced tour guides.

Challenges in catering to this group of tourists include the limited range of experiential tourism products. There is also limited availability of good quality accommodation, spa services and tour guides, especially foreign language guides specializing in French, Spanish, German and Italian. Further, tourist information and interpretation materials still need improvement.

3.3 Mid to high-end independent international tourists mainly come from the United Kingdom, Australia, the United States and those who live and work in Asia, such as in Bangkok, Chiang Mai, Singapore, Hanoi and other regional destinations. They are mostly middle-aged, and travel as couples and as a family. Key destinations include Vientiane, Vang Vieng, Luang Prabang, and southern Laos. They travel independently and are tech savvy. Hence, they prefer to travel on their own. They tend to research destinations on information and social media platforms such as Tripadvisor, Lonely Planet or other travel sites. Accommodation is usually booked through Agoda or Booking.com. They engage in day tours such as zip lines and jeep tours, use the services of a local or area tour guide, stay at quiet quality accommodation, and avoid crowded facilities. They use traditional massage services, and often engage in activities to experience the local culture. They tend to travel to and from provinces by air, and use tourist information centers. This type of tourist visit throughout the year, but the peak period is from November to March. Their average length of stay is between seven and 10 days, and they spend a daily average of USD 90 per person. Challenges include limited online travel information and local tourism products, as well as inconvenient public transport.

3.4 Independent international budget tourists mainly come from Europe, the United Kingdom, Australia and the United States. This group consists of young travelers between the ages of 18-29 years, and have limited budgets. This group travels all year round, often for exotic experiences and entertainment. The average length of stay is seven to 10 days with the average daily expenditure of about USD 15-20 per person. This group of tourists are tech savvy and rely mainly on online information platforms for information on destinations. They generally book accommodation through Agoda, Booking.com and hotels.com, and view information on Lonely Planet. Lao PDR is one of their major tourist destinations in the Mekong Sub-Region. They book their own tours, choose affordable activities and stay in hotels and inexpensive guesthouses with internet connections. They travel domestically by plane and buses. Challenges include an uncomfortable and inconvenient public transport system. There is also a language barrier in communicating with hotel owners.

3.5 Tourists who cruise along the Mekong River are mostly high-end international tourists. The most popular cruise route is Huay Xai - Pak Bang - Luang Prabang, with some groups continuing their cruise to Vientiane followed by flying to Pakse to sail in the 4,000 Islands area. They enjoy the cultural heritage along the Mekong River. The preferred time of year to travel is between October and March with the average length between two and eight days. Their average daily expenditure is between USD 160-220 per person. These groups are usually friends and family traveling together. They

tend to book with cruise operators with good standards such as Mekong River Cruise, Mekong Smile Cruise and The Luang Say Lodge & Cruise.

Challenges include the environmental impact along the Mekong River, which is an on-going issue, as well as unpredictable water levels. In recent years, during the cruising season, the water level is often unexpectedly low, which has made the Mekong difficult and sometimes impossible to cruise.

- 3.6** Thai group tours mostly travel on four different routes: 1) fly directly to Luang Prabang, 2) fly to Wattay Airport to visit Vientiane Capital and Vang Vieng, 3) arrive by double decker tour buses or vans via the Friendship Bridge 1 to visit Vientiane Capital and Vang Vieng, and 4) arrive by double decker tour buses and vans via Vang Tao/Chong Mek Border crossing in Champasak province in southern Laos. Most are middle-aged and seniors who are interested in religion, festivals and religious pilgrimages. The visits are usually guided by the company's tour schedule. Due to the large number of people on these tours, they do not have much time for experiential activities. They like to be entertained at tourist attractions and while traveling. Therefore, tour guides must have skills in creating a lively atmosphere, with funny stories and singing. The influx of Thai tourists is usually during Lao New Year and long holidays in Thailand, with an average length of stay of about three days and two nights, and an average daily expenditure of between USD 56-118 per person. They use the services of tour companies in Thailand and in Laos. Challenges include limited online travel information, tourism signage, and facilities such as restrooms and parking, which are not standardized. Tour prices in Laos are more expensive than in neighboring countries such as Vietnam, which attracts more Thai tourists.
- 3.7** Koreans mostly travel in large groups organized by tour companies, and directly fly to Wattay Airport in Vientiane Capital. Their itineraries include touring Vientiane Capital, flying to Luang Prabang and traveling to Vang Vieng by road before continuing to Vientiane Capital before departing at Wattay Airport. They are interested in cultural and natural heritage. Korean group tours travel year round. The average length of stay is from four to six days. However there is no data on average daily expenditures. Hana Tour is among one of the most popular tour operators that caters to Korean group tours. Popular activities among Korean group tours include golf as it is less expensive to play in Laos than in Korea. In recent years, there has been many direct flights from the Korea with golf tourism as one of the main draws. Challenges include a lack of Korean speaking tour guides, Korean language information is still limited, and Koreans prefer to use Korean-owned businesses and services.
- 3.8** Chinese tour groups arriving by air, travel to Laos via Wattay International Airport or Luang Prabang. Their itineraries include visiting Vientiane Capital, Vang Vieng and Luang Prabang. In general, they do not speak any other language than Mandarin or Cantonese, and very little English. They want to experience a different culture other than their own. The most popular time for Chinese visitors is during the Chinese New Year (January-February), and stay an average of between two and eight days. Currently, there is no information on their daily expenditure. There are several direct

flights from China from Kunming, Guangzhou, Changsha, Changzhou, Shendu and Xianghong. However, the number of Chinese-speaking tour guides is limited, and there is not much information available in Chinese.

3.9 In recent years, a growing number of Chinese tour groups enter Laos by car in self-drive tour groups. They organize a caravan of several vehicles, and arrive via the Boten checkpoint in Luang Namtha Province. The typical route is usually Boten to Xay District, Oudomxay Province before continuing to visit Luang Prabang and Vang Vieng. They then return to China via the same route. The average group size per caravan is between eight and 16 people. They use traditional massage services, buy food and drinks from street vendors and visit the Luang Prabang night market. Most come during Chinese New Year in January-February and generally spend four days and three nights with the average daily expenditure of approximately USD 72 per person.

Disadvantages are that they mostly use Chinese-owned business services, which limits the distribution of income to locals. Most do not speak English, making communication difficult. There are not many local tour companies that cater to this market. Therefore, most companies catering to Chinese in Laos are operated by Chinese entrepreneurs.

3.10 MICE tourists mostly comprise the domestic MICE market. These include local companies, government and international organizations holding conferences in Vientiane Capital, Luang Prabang, Pakse, Tha Lat and Vang Vieng in Vientiane Province, with the average number of participants between 40 and 200 people. The international MICE market includes multinational companies from Singapore, Hong Kong, Kuala Lumpur, Bangkok, Hanoi, Shanghai and Beijing, with the average number of participants between 40 and 120 people. Conferences are usually followed by trips to key tourism attractions such as Vat Phu, Bolaven Plateau, Kuangsi Waterfall and the Luang Prabang World Heritage City travelling by bus or van. According to the MICE Guide to Laos, Membership Directory 2019, published by the Lao National Chamber of Commerce and Industry, 16 businesses were registered including hotels and resorts in Luang Prabang, Oudomxay, Vang Vieng, Vientiane and Pakse. The MICE market can be viewed as a year-round sector with the average length of stay of two to three days. There is no information on the average daily expenditure. Many venues still need to improve the quality of services. Attracting participants to stay on longer by doing site visits also remains a challenge.

3.11 Domestic Lao tourists and foreigners working in Laos travel within and outside the provinces in which they live and work. They typically travel by private car or by air, and as a family, couple or with friends. They usually stay at a hotel with convenient parking, enjoy local food, buy local souvenirs, and use the public restrooms at various rest stops. Domestic (Lao) tourists prefer visits to natural settings that provide onsite restaurant services with music. Domestic tourists travel throughout the year. However, weekends, public holidays and important religious holidays and festivals are the most popular times. The average length of stay is between one and three

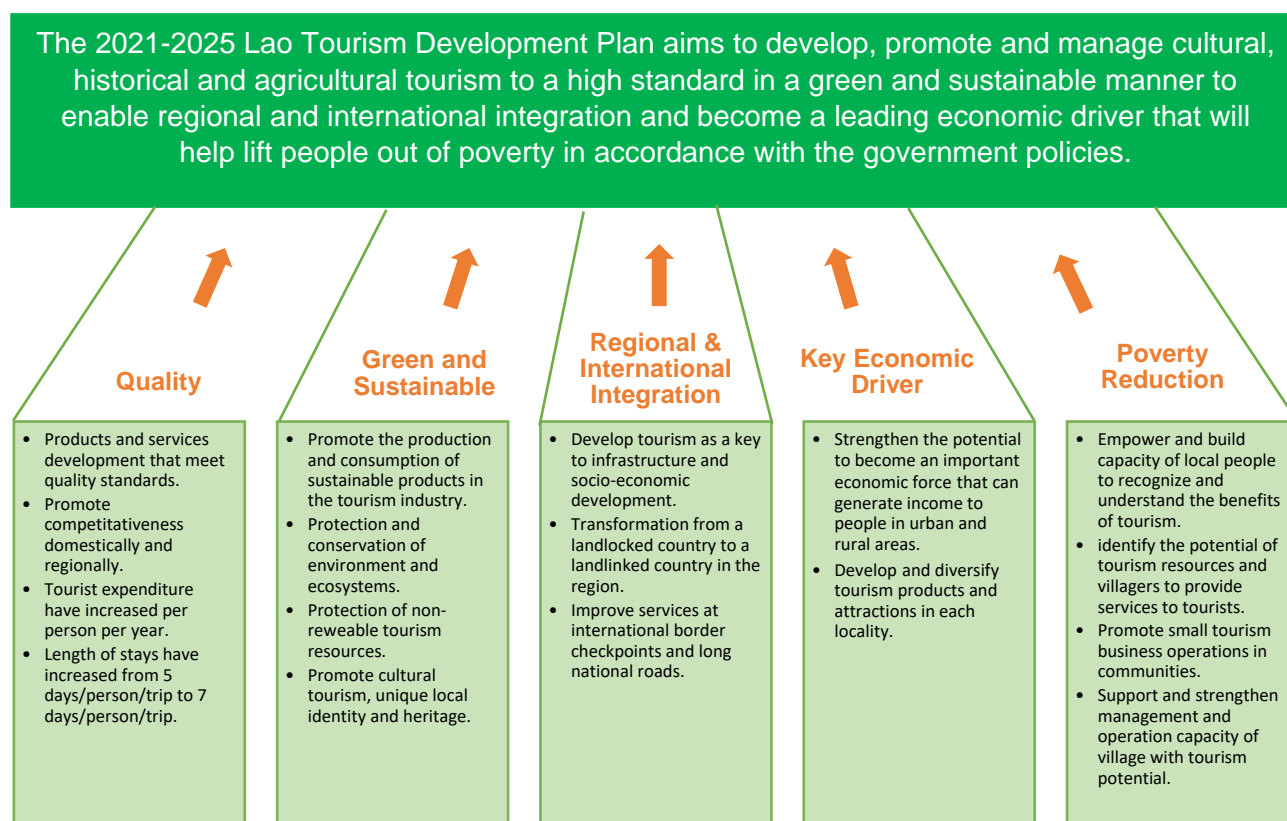
days. There is no information available on the average daily expenditure for this group.

Unfortunately, marketing and advertising does not properly reach this group of tourists coupled with the limited availability of tourist information in Lao language. Also, there are limited road signs along national roads and a lack of information and interpretation signs at tourist attractions. In general, basic tourism facilities such as public toilets are not standardized. Waste management is still a big problem, as many Lao tourists have a low awareness of proper waste disposal. Overall, the costs of consumer products in Laos are higher than neighboring countries. Therefore, local people have a higher preference for imported goods that are better in quality and lower in price.

4. Vision, Goals, Key Targets and Workplan

4.1 Vision

The 2021-2025 Lao Tourism Development Plan aims to develop, promote and manage cultural, historical and agricultural tourism to a high standard in a green and sustainable manner to enable regional and international integration and become a leading economic driver that will help lift people out of poverty in accordance with the government policies.



The vision consists of 5 main components: 1) quality, 2) green and sustainable, 3) regional and international integration, 4) key economic driver and 5) poverty reduction.

4.2 Goals

Goal 1: Human resource development in tourism that strengthens the political aspirations, while improving the technical capacity to ensure both quality and quantity.

- Implementation
 - Improve the quality of tourism services in accordance with the needs of all target groups.
 - Develop tourism in relation to cultural preservation and environmental protection.
 - Classify tourist attractions at the national and local levels.

Goal 2: Tourism infrastructure and facilities development and improvement to ensure quantity and quality.

- Implementation
 - Improve facilities to accommodate the increase of domestic and foreign tourists.
 - Build tourism facilities at the Lao-China railway stations to accommodate tourists traveling along the railway line.
 - Develop and improve facilities to ensure safety and cleanliness.

Goal 3: Create, improve and disseminate tourism-related laws and regulations that are enforceable and applicable according to the circumstances.

- Implementation
 - Increase the capacity and competitiveness of the tourism labor force to meet international standards.
 - Develop human resources for the tourism industry that meet market needs.
 - Increase the capacity of local people to ensure maximum participation and benefits from tourism.

Goal 4: Develop and improve the quality of tourist attractions, and tourism related products and services that is in line with the sustainability initiatives.

- Implementation
 - Develop the Lao PDR into a safe and high-quality destination.
 - Survey and plan for the development of tourist attractions and tourism products in accordance with standards to accommodate tourists traveling on the Lao-China railway.
 - Develop and improve priority tourism linkages between the northern provinces of the Lao PDR and the Chinese tourism route with an emphasis on ecotourism and cultural, historical, and agricultural tourism.
 - Formulate a COVID-19 tourism recovery plan to revitalize Lao PDR's tourism industry that is adaptive to the new normal.
 - Promote tourism with an emphasis on the uniqueness of Laos, and that Laos is a stand-alone destination.
 - Promote “Lao Tour Laos” tourism throughout the country as a revival process.

- Develop diverse promotional activities with stakeholders by using modern technology.

Goal 5: Promote and market Laos to reach the target markets to achieve both quantity and quality.

- Implementation

- Strengthen the coordination among the relevant government sectors to ensure effective management and operation of the tourism sector.
- Initiate and strengthen the management capacity of tourism business associations and groups, hotels and restaurants, tour guide associations and groups and support the establishment of associations or groups in the provinces that have yet to establish one.
- Increase cooperation regionally and internationally in tourism development and management.

Goal 6: Coordinate and cooperate with the relevant public and private sectors, both domestically and internationally, regarding the development, promotion and effective management of tourism.

- Implementation

- Improve tourism laws in accordance with current situation.
- Create and improve legislation related to the tourism sector that can enhance better management and operation of the tourism businesses and ensure that legal obligations are met.
- Create and improve service standards in the tourism sector in accordance with ASEAN and international standards.
- Disseminate laws, regulations and tourism standards to authorities and businesses at the provincial level to increase awareness and understanding.

4.3 Key Targets

The 15 key targets and projections are as follows:

1. Strive to attract approximately 15,166,154 tourist arrivals to Laos that can potentially generate an income of USD 3,813,772,389 with the average length of stay of seven days per person depending on vaccine availability. However, in the case of limited availability of vaccines, the projection would likely be about 5,968,697 tourist arrivals with earnings of about USD 1,505,889,199 and an average length of stay of four days.
2. Strive to complete at least 15 priority tourism site development plans designated by the government and the private sectors. Collaborate with relevant authorities at the central and local levels to survey, identify boundaries, demarcate boundaries, and issue tourism land-use certificates for at least 30 tourist sites. Improve and develop at least 15 outstanding tourism sites to enhance the quality and ensure linkages with regional products, while meeting the standards of Lao PDR and having quick economic returns.

3. Install more than 10% of the national and local tourist sites that are already open with star signage, and implement a modern ticketing system at more than 15 national tourist sites.
4. Improve and upgrade more than 10 district tourist destinations to meet the standards of clean tourism cities of the Lao PDR and ASEAN.
5. Upgrade and improve more than 20 public toilets to meet the standards of public toilets in Lao PDR and ASEAN.
6. Strive to improve the quality of more than 10 homestay villages (50 houses) to meet the standards of Lao PDR and ASEAN, while improving and developing more than 15 community-based tourism products.
7. Create and improve at least seven legislation actions and related documents for tourism business management in accordance with the current situation, and disseminate countrywide.
8. Develop a tourism strategy for the Lao PDR that aligns the unique features of the country, and enable linkages regionally and internationally. Continue to adapt the Lao tourism standards in accordance with ASEAN standards, and disseminate to relevant legislations nationwide.
9. Strive to systematically improve and equip tourism information centers in each province, tourist cities and international checkpoints.
10. Endeavor to organize the 4th Lao Tourism Year in 2024.
11. Expand Lao tourism representative offices to one to three target market countries.
12. Strive to produce tourism promotional materials in many languages, such as Lao, English and Chinese that can be made available to domestic and foreign tourists.
13. Improve and redesign the Lao tourism website by adding more languages that can reach a more diverse audience, and provide a variety of tourism information.
14. Develop a Tourism Mobile Application with several language options, such as Lao, Thai, Chinese, English and other languages.
15. Provide technical capacity building to at least 6,000 participants from both the public and private sectors.

4.4 Targeted Work Plan

The tourism targeted work plan includes six goals and 26 focus tasks as follows:

To achieve Goal 1: Human resource development in tourism that strengthens political aspirations while improving the technical capacity to ensure both quality and quantity, with five focus tasks:

1. Upgrade the capacity of human resources in the tourism sector to allow for gradual international linkages.
2. Develop and improve short-term tourism training courses and training trainers.
3. Organize training and workshops to raise awareness about tourism for local people.

4. Establish a coordination network between the government and the business sector, both domestic and overseas, in terms of human resource development in the tourism sector.
5. Implement the ASEAN Mutual Recognition Agreement on Tourism Professionals.

To achieve Goal 2: Tourism infrastructure and facilities development and improvement to ensure quantity and quality. There are five focus activities:

1. Improve and develop tourism infrastructure and facilities to achieve both quantity and quality in line with regional and international standards.
2. Install tourism facilities at each train station along the Lao-China railway, especially tourist information centers, local product showrooms, clean bathrooms and others.
3. Develop and improve the air, land and water tourist service system in collaboration with the Ministry of Public Works and Transport.
4. Collaborate with the relevant authorities to improve the facilities for domestic tourism.
5. Build and develop a foundation for tourism institutions and tourism training centers in Vientiane Capital.

To achieve Goal 3: Create, improve and disseminate tourism related laws and legislation that are enforceable and applicable according to the circumstances, including three focus tasks:

1. Draft and improve relevant legislation for the tourism sector and disseminate among the government, business sectors and the local communities.
2. Formulate, improve, disseminate and implement tourism standards countrywide.
3. Manage, monitor and inspect tourism businesses to ensure compliance and good operation that meet national and international standards.

To achieve Goal 4: Develop and improve the quality of tourist attractions, tourism-related products and services to be in line with the sustainability initiatives, which includes seven focus activities:

1. Classify national and local tourist attractions throughout the country.
2. Develop tourism routes that link regions within the country and with neighboring countries.
3. Develop planning on the use of natural, cultural, historical and agricultural tourism resources in a sustainable manner.
4. Study, survey and plan for tourism development along the Lao-China railway to accommodate tourists based on the potential of both countries in promoting ecotourism, cultural, historical and agricultural tourism, especially community-based tourism and the production and supply of organic products.
5. Develop and improve ecotourism products and community-based tourism to achieve both quantity and quality to meet national and regional standards, to become a preferred destination for domestic and foreign tourists.

6. Promote and compete in hosting national and regional level meetings and conferences in major cities in the Lao PDR.
7. Develop data collection and an analysis system that allows for timely production of tourism statistics and reporting.

To achieve Goal 5: Promote and market Laos to reach the target markets to achieve both quantity and quality, which includes four focus activities:

1. Promote Lao PDR as a destination for quality and safe ecotourism and community-based tourism in ASEAN.
2. Attract target markets through various marketing campaigns, events and activities.
3. Promote "Lao Thiao Laos" nationwide to boost domestic tourism.
4. Increase the use of the Lao media and modern technology as a vehicle to reach target markets.

To achieve Goal 6: Coordinate and cooperate with the relevant public and private sectors, both domestically and internationally, regarding the development, promotion and effective management of tourism. There are four focus areas:

1. Strengthen the coordination of relevant government departments to ensure effective development, management and operation of the tourism sector.
2. Support and strengthen the management of the tour agent associations and groups, hotel and restaurant associations and groups and tour guide associations and groups. Encourage the establishment of groups in the provinces that have yet to be established.
3. Promote and attract public investment and participation of local communities and businesses, both domestic and foreign, in the development of tourism.
4. Increase cooperation regionally and internationally in tourism development and management.

4.5. Action Plan and Integration of Sustainable Development Goals and Green Growth

To implement and integrate the goals of sustainable development and green growth, there are two main goals:

Goal 1: Achieve quality and standards for Lao tourism, including one focus activity:

1. Develop and implement the nine tourism standards of Laos and ASEAN, namely: Lao PDR Clean Tourist City Standards, Tourist Sites Classification Standards, ASEAN Green Hotel Standards, Lao PDR Homestay Standards, Lao PDR Community-Based Tourism Standards, Lao PDR Public Toilet Standards, ASEAN Spa Service Standards, Lao PDR Meeting Room Standards and Tour Company Standards using GSTC criteria.

Goal 2: Achieve the green tourism network quality and increase its regional competitiveness. The focus areas are:

1. Improve the quality of the green tourism network; develop the network, especially in the focus areas including tourist attractions, tourism businesses and tourism activities, waste reduction; use of environmentally friendly transport and efficiently use resources and energy.
2. Create and improve legislation for the tourism sector in line with the green and sustainable initiative, including: create legislation and set policies to facilitate the development of tourism in natural areas, reduce pollution, implement waste management, efficiently use resources and energy and use environmentally friendly transportation for the tourism sector.
3. Encourage the production and consumption of sustainable tourism products, and raise awareness among the tourism industry practitioners on the use of environmentally friendly products, as well as organize workshops and seminars, and information exchanges and exhibitions on sustainable tourism development through collaboration with public, private and international organizations.

4.6 Tourism Investment Plan

1. Government budget allocation

Public investment of tourism projects over the next five years (2021-2025), including 39 projects, with a total value of 46,862,000 kip.

2. Official Development Assistance (ODA)

Continue the implementation of the Tourism Infrastructure for Inclusive Growth Project funded by the ADB, Phase II grant of USD 47 million.

Part IV: Mechanism for Implementation, Monitoring and Evaluation

1. Mechanism for Implementation

Ensuring the implementation of the tourism development and management plan for the years 2021-2025 to be successful and help boost the economy, which requires active commitment and a focused work plan each year as follows:

- Disseminate the tourism development plan for 2021-2025 to the relevant government departments at the central and local levels, the private sector and international organizations that provide technical assistance in the tourism sector to ensure awareness and enhanced understanding.
- Ensure the relevant departments within the Ministry of Information, Culture and Tourism be responsible for the implementation of the target activities, and prioritize the implementation of the annual and the five-year projects in line with the trends of the target markets and international tourism.
- Prepare a budget plan to implement projects set out in the tourism development and management plan for the years 2021-2025 that can be funded through government investment, and through funds from domestic and foreign investors with a strong focus on the priority projects that provide quick economic returns, while remaining sustainable.
- Prioritize each project to be implemented each year, clearly define the time period and source financing.

2. Monitoring and Evaluation

- Monitoring and evaluation must be carried out annually against the baseline targets, goals and the implementation of each project. As a leading implementing agency, the Ministry of Information, Culture and Tourism will coordinate with all parties, both public and private, at the central and local levels for the annual monitoring and evaluation and five-year evaluation.
- Monitoring and evaluation is the evaluation of the implementation of the five-year plan. It is the monitoring the effectiveness and efficiency of the project implementation. Focusing on the success of the implementation of each target and project.
- The key projections need to be adjusted in accordance with the actual tourism development during each stage of implementation.
- In achieving multi-sectoral tasks, the Ministry of Information, Culture and Tourism, especially the relevant departments, requires strong, regular, systematic coordination between departments, localities and social stakeholders.
- Monitoring and evaluation must be in line with the actual work, and the results will be reported with a summary statistics for each quarter and each year. This will provide confirmation of the results of the implementation.

Annex 1: Table 1 Goals, targets and priority projects for the five-year period 2021 – 2025

Goal	Priorities		Projects	Value	Sources of Funding		Timeframe	Responsible Department
					Domestic	Foreign Investment		
Human resource development in tourism that strengthens the political aspirations of the country, while improving the technical capacity to ensure both quality and quantity.	Upgrade the capacity of human resources in the tourism sector to allow gradual international linkages.	I	Central and local staff capacity building program for marketing	2,120.00	2,120.00			
		1	Tourism marketing to attract regional and international tourists	500.00	500.00		2021-2025	Tourism Marketing Department
		2	Tourism marketing and promotion (Continued from 2016)	620.00	620.00		2021-2025	Tourism Marketing Department
		3	Tourism marketing to attract Chinese tourists	500.00	500.00		2021-2025	Tourism Marketing Department
		4	Capacity strengthening for local staff on tourism promotion strategies.	500.00	500.00		2021-2025	Tourism Marketing Department
		II	Central and local staff capacity building program on public relations.	1,500.00	1,500.00			
		1	Training on online tourism promotion for central and local staff.	500.00	500.00		2021-2025	Tourism Marketing Department

Goal	Priorities		Projects	Value	Sources of Funding		Timeframe	Responsible Department
					Domestic	Foreign Investment		
		2	Training on designing tourism promotional materials for central and local staff.	500.00	500.00		2021-2025	Tourism Marketing Department
		3	Strengthen service standards for information centers and kiosk staff.	500.00	500.00		2021-2025	Tourism Marketing Department
		III	Strengthen capacity on tourism management for central and local personnel.	1,000.00	1,000.00			
		1	Strengthen capacity on tourism business management for central and local personnel.	500.00	500.00		2021-2025	Tourism Management Department
		2	Provide training to provincial and district staff on the management of tour guides.	500.00	500.00		2021-2025	Tourism Management Department
		Tourism infrastructure and facilities development and improvement to ensure quantity and quality.	Improve and develop tourism infrastructure and facilities that can achieve both quantity and quality in line with regional and international standards.	1	Improvement and development of tourism infrastructure and facilities.	518,000.00	47,500.00	470,000.00
		1	Develop ADB-supported tourism infrastructure.	488,000.00	18,000.00	470,000.00	2019-2024	Tourism Development Department & relevant agencies

Goal	Priorities		Projects	Value	Sources of Funding		Timeframe	Responsible Department
					Domestic	Foreign Investment		
		2	Construct public toilets at three national tourist sites to meet ASEAN standards.	1,500.00	1,500.00		2021-2025	Tourism Development Department
		3	Improve tourist attractions, facilities and services at national tourist sites to a meet ASEAN standards.	3,000.00	3,000.00		2021-2025	Tourism Development Department
		4	Build infrastructure and improve facilities along waterways, highways, international checkpoints and Lao-China railway stations.	1,000.00	500.00		2021-2025	Tourism Development Department
	Develop and improve the air, land and water tourist service system in collaboration with the Ministry of Public Works and Transport.	5	Coordinate with relevant departments to improve public transport in major cities and tourist cities that can be linked with neighboring countries.	500.00	500.00		2021-2025	Tourism Development Department
	Improve and develop infrastructure and provide equipment	6	Supply equipment and tourism information to the provincial tourism information offices, information kiosks along tourism routes and international checkpoints throughout the country.	4,000.00	4,000.00		2021-2025	Tourism Marketing Department

Goal	Priorities		Projects	Value	Sources of Funding		Timeframe	Responsible Department
					Domestic	Foreign Investment		
	for Tourism Information Centers.	7	Build a national tourism information center in Vientiane Capital	20,000.00	20,000.00		2021-2025	Tourism Marketing Department
Create, improve and disseminate tourism related laws and legislation that is enforceable and applicable according to the circumstances.	Draft and improve relevant legislation for the tourism sector and dissemination among the government, business sectors and the local communities.	I	Assessment of the implementation of laws and legislations in the tourism sector.	1,360.00	1,000.00	360.00		
		2	Review and evaluate the implementation of tourism laws and activities in the tourism sector countrywide.	500.00	500.00		2021-2025	Tourism Management Department
		3	Develop a strategic plan for the Lao PDR's tourism management in line with regional and international integration.	500.00	500.00		2021-2025	Tourism Management Department
		4	Develop and disseminate tools to combat child labor, and child sex trafficking in tourism, supported by the ILO.	360.00		360.00	2021-2025	Tourism Management Department
	Draft, improve, disseminate and implement tourism standards throughout the country.	II	Draft, revise, disseminate and implement tourism standards	3,200.00	3,200.00			
		1	Improve and create five tourism standards for the Lao PDR.	2,500.00	2,500.00		2021-2025	Tourism Development Department

Goal	Priorities		Projects	Value	Sources of Funding		Timeframe	Responsible Department
					Domestic	Foreign Investment		
		2	Disseminate tourism classification standards, assessments, improvements, logo designs and certification nationwide.	500.00	500.00		2021-2025	Tourism Development Department
		3	Design logos; signage; star labels; standards for local, national and tourist attractions; and divide management between central and local.	200.00	200.00		2021-2025	Tourism Development Department
	Manage, monitor and inspect tourism businesses to ensure compliance and good operation that meet national and international standards.	III	Survey and collect data to provide a baseline for management	2,500.00	2,500.00			
		1	Conduct nationwide information collection on tourism businesses for standardized classification.	500.00	500.00		2021-2025	Tourism Management Department
		2	Conduct information collection and research tourism product and service prices.	500.00	500.00		2021-2025	Tourism Management Department
		3	Conduct research study on the impact of “zero dollar” tourism.	500.00	500.00		2021-2025	Tourism Management Department
		4	Conduct surveys among domestic and foreign tourists for satisfaction with the tourism services and tour operation in the Lao PDR.	500.00	500.00		2021-2025	Tourism Management Department

Goal	Priorities		Projects	Value	Sources of Funding		Timeframe	Responsible Department
					Domestic	Foreign Investment		
		5	Carry out inspection and evaluation on the standardization of restaurant services for all restaurants countrywide.	500.00	500.00		2021-2025	Tourism Management Department
Develop and improve the quality of tourist attractions, tourism related products and services that is in line with the sustainability initiatives.	Develop a data collection and analysis system that allows for the timely production of tourism statistics and reporting.	1	Tourism education, survey and research	4,400.00	2,400.00			
		1	Conduct survey, design, allocate, demarcate, and issue land use certificates for priority tourist sites throughout the country.	600.00	600.00		2021-2025	Tourism Development Department
		2	Survey and design public toilets at national tourist sites emphasizing the unique Lao design, in harmony with culture and the environment.	300.00	300.00		2021-2025	Tourism Development Department
		3	Survey and collect information on ecotourism in Dong Hua Sao, Nam Et-Phu Luey and Hin Nam Nor National Parks.	500.00	500.00		2021-2025	Tourism Development Department
		4	Collect labor statistics in the tourism sector.	500.00	500.00		2021-2025	Tourism Management Department

Goal	Priorities		Projects	Value	Sources of Funding		Timeframe	Responsible Department
					Domestic	Foreign Investment		
		5	Develop data a collection system to collect labor statistics in the tourism sector.	500.00	500.00		2021-2025	Tourism Management Department
		6	Research, survey and develop a tourism plan along the Lao-China railway.	500.00	500.00		2021-2025	Tourism Development Department
		7	Develop and improve priority tourism routes between the northern provinces of Lao PDR that link with the tourism routes of China.	1.000.00	1.000.00		2021-2025	Tourism Development Department
		8	Develop a plan to revive the Lao PDR's tourism from the outbreak of the COVID-19 pandemic to improve and adapt products and services to the new tourism context.	500.00	500.00		2021-2025	Tourism Development Department
Promote and market Laos to reach the target markets and to achieve both quantity and quality.	Increase the use of Lao media and modern technology as a vehicle to reach target markets.	I	Tourism Information Improvement and Management.	1,642.00	1,642.00			
		1	Update and manage tourism information on social media.	500.00	500.00			Tourism Marketing Department
		2	Collect information on tourism sites and attractions throughout the country to improve and update promotional materials.	1,142.00	1,142.00			Tourism Marketing Department

Goal	Priorities		Projects	Value	Sources of Funding		Timeframe	Responsible Department
					Domestic	Foreign Investment		
Coordinate and cooperate with the relevant public and private sectors, both domestically and internationally, regarding the development, promotion and effective management of tourism.	Promote and attract public investment, participation of local communities and businesses, both domestic and foreign, for the development of tourism.	I	Technical seminars between the public and private sectors.	500.00	500.00			
		1	Organize technical seminars between the public and private sectors.	500.00	500.00			Tourism Management Department
Achieve Lao tourism quality and standards.	Implement Lao and ASEAN tourism standards.	1	Implement the 9 tourism standards of Laos and of ASEAN, namely: Lao PDR Clean Tourists City Standards, Tourist Sites Classification Standard, ASEAN Green Hotel Standards, Lao PDR Homestay Standards, Lao PDR Community-Based Tourism Standards, Lao PDR Public Toilet Standards, ASEAN Spa Service Standards, Lao PDR Meeting Room Standards and Tour Company Standards using GSTC criteria.	5.000.00	5.000.00			Institute of Mass Media, Culture and Tourism, Tourism Management Department and Tourism Development Department

Goal	Priorities		Projects	Value	Sources of Funding		Timeframe	Responsible Department
					Domestic	Foreign Investment		
Achieve a green tourism network for quality and to increase regional competitiveness.	Improve the quality of the green tourism network.	2	Develop the network, especially in the focus areas: tourist attractions, tourism businesses and activities, waste reduction, use of environmentally friendly transport and efficient use resources and energy.	1.000.00	1.000.00			Tourism Management Department, Tourism Development Department
	Create and improve legislation in the tourism sector in line with the green and sustainable initiative.	3	Create legislation and set policies to facilitate the development of tourism in natural areas; reduce pollution, develop waste management, efficiently use resources and energy, and use environmentally friendly transportation for the tourism sector.	500.00	500.00			Tourism Management Department, Tourism Development Department
	Support the production and consumption of sustainable tourism products.	4	Raise awareness among the tourism industry practitioners on the use of environmentally friendly products. As well as organize workshops/seminars, information exchanges and exhibitions on sustainable tourism development through collaboration with public, private and international organizations.	500.00	500.00			Tourism Management Department, Tourism Development Department and Tourism Marketing Department
Total				539,222.00	68,826.00	470,360.00		

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