

KEY POINTS

- Before the COVID-19 pandemic, tourism was rapidly growing in the Lao People's Democratic Republic (Lao PDR). However, measures implemented to contain the pandemic are expected to severely affect the tourism sector.
- This brief draws on findings from two rounds of tourism enterprise surveys in four of the Lao PDR's major tourism destinations in August 2019 and May 2020.
- Half of the surveyed enterprises were temporarily closed in May 2020. About 78% of enterprises were closed in Louangphabang, a popular UNESCO World Heritage destination. About 70% of the surveyed enterprises had reduced employees, with employee numbers falling by 38%.
- The negative impact was larger among enterprises that primarily served international guests than among those that primarily served domestic guests in 2019. Promoting domestic tourism could be part of the recovery plan for the Lao PDR's tourism sector.
- Concerns about safety and the need to rebuild consumer confidence are reflected by the high percentage of respondents who strongly support improved COVID-19 screening and testing at international borders and of the general population.

The Impact of COVID-19 on Tourism Enterprises in the Lao People's Democratic Republic: An Initial Assessment¹

INTRODUCTION

Before the coronavirus disease (COVID-19) outbreak, travel and tourism contributed 10.4% to global gross domestic product (GDP) and supported 319 million jobs (World Travel and Tourism Council [WTTC] 2019). International tourist arrivals reached 1.5 billion in 2019, and the United Nations World Tourism Organization (UNWTO) forecasted that international arrivals would grow by 3%–4% in 2020 (UNWTO 2020a). Arrivals in the Asia and Pacific region were expected to grow by 5%–6% in 2020. If managed well, this rapid expansion of tourism was expected to contribute to poverty reduction and inclusive growth (Chok, Macbeth, and Warren 2007; Mitchell and Ashley 2009; ADB 2017).

Since March 2020, COVID-19 has paralyzed tourism as countries closed their borders, suspended commercial aviation, restricted domestic travel, and implemented physical distancing measures. The UNWTO reports 22% fewer international arrivals in the first quarter of 2020 compared with the same period in 2019, with the largest drop in the Asia and Pacific. In light of the pandemic, global arrivals could decline by up to 78% in 2020. This would place 120 million jobs at risk and reduce visitor exports by \$1.2 trillion (UNWTO 2020b). Developing Asia, particularly tourism-dependent countries in Southeast Asia, is expected to be heavily affected (ADB 2020).

The Lao People's Democratic Republic (Lao PDR) reported its first two COVID-19 cases on 24 March 2020 (Government of the Lao PDR, Ministry of Health n.d). A nationwide lockdown followed on 30 March 2020, prohibiting residents from leaving their homes except for essentials. All international ports of entry were closed to tourists, issuance of tourist visas suspended, and interprovincial travel banned.² Although hotels, resorts, and restaurants were allowed to continue operating under strict guidelines, travel restrictions severely undercut demand.

¹ This brief was prepared by Takashi Yamano, Manisha Pradhananga, Steven Schipani, Jindra Nuella Samson, Lotis Quiao, Soulinthone Leuangkhamasing, and Angelica Maddawin. The authors acknowledge the contribution of Tuesday Soriano, Homer Pagkalinawan, and Joe Mark Ganaban. The surveys were conducted by the Enterprise & Development Consultants Co., Ltd., Vientiane, Lao PDR. The brief also benefited from review and suggestions received from Rana Hasan, Yasuyuki Sawada, and other colleagues across the Asian Development Bank (ADB).

² A nationwide lockdown was initially announced from 30 March 2020 to 19 April 2020 under Prime Minister Order No. 06/PM (Savankham 2020a). On 15 April 2020, the lockdown was extended until 3 May 2020 (Phonevilay 2020).

As of early May 2020, the Lao PDR reported only 19 confirmed COVID-19 cases and no deaths. The nationwide lockdown and intra-provincial travel restrictions were lifted starting 4 May 2020 and by 18 May 2020 tourist sites were open and interprovincial travel was permitted, including domestic flights (Savankham 2020b). However, international borders remain closed to tourists as of 23 June 2020.

Although the Lao PDR has thus far avoided severe health impacts from the COVID-19 pandemic, the effect on the economy, especially the travel and tourism sector, is expected to be devastating. International arrivals to the country have dropped by 17% in the first quarter of 2020 compared with the same period in 2019 (Government of the Lao PDR, Ministry of Information, Culture, and Tourism [MICT] unpublished). The simultaneous drop in tourism revenue, remittances, and commodity prices could reduce the Lao PDR's GDP growth to -0.5% in 2020 (ADB 2020).

While the long-term consequences of COVID-19 will become clearer in the coming months and years, in this brief we estimated the initial impact of the pandemic on select tourism enterprises (hotels, guesthouses, resorts, and restaurants) in the Lao PDR. We conducted two surveys of tourism enterprises in four of the country's major tourism destinations. The initial survey was conducted in August 2019 with 366 enterprises. In May 2020, we performed a follow-up survey of 327 enterprises. Results indicate that about half of these enterprises were temporarily closed in May 2020. About 70% of the surveyed enterprises had reduced employees, with employee numbers falling by 38%. The negative impact was larger among enterprises that target international guests. Although respondents cite lack of working capital as a major obstacle to continue or resume their businesses, they are reluctant to borrow from financial institutions, and alternatively preferred for fiscal support measures such as tax relief and cash transfers. Moreover, the respondents strongly supported improved COVID-19 screening at the border to protect public health, and build consumer confidence.

TOURISM IN THE LAO PDR BEFORE THE ONSET OF COVID-19

Before the onset of the COVID-19 pandemic, tourism was rapidly growing in the Lao PDR. In 2019, international tourist arrivals increased by 14.4%, reaching an all-time peak of 4.79 million. International tourism receipts totaled \$934 million, trailing mineral exports (\$1.43 billion) and electricity exports (\$1.32 billion). During 2010–2019, international tourist receipts increased faster than international arrivals, suggesting an increasing value addition from the sector (Government of the Lao PDR, MICT 2019). Recent reports estimate that tourism directly contributes to 4.6% to GDP and employs 54,000 workers, about 63% of whom are women (WTTC 2018; Ministry of Education and Sports 2018).

Growing linkages between tourism and the rest of the economy imply that the indirect contribution of tourism is expected to be much higher (Khanal, Gan, and Becken 2014).

International tourists in the Lao PDR come mainly from Thailand, which accounted for more than 2.1 million arrivals in 2019 (45.0% of the total), followed by the People's Republic of China (PRC) (21.3%), Viet Nam (19.3%), and the Republic of Korea (4.2%) (Government of the Lao PDR, MICT 2019). Open tourist visa policies and better physical connectivity with its neighbors have significantly boosted intra-regional travel. In 2019, 66.7% of international visitors were from Association of Southeast Asian Nations (ASEAN) members compared with only 3.8% from Europe and 1.7% from the Americas. The Lao PDR is a signatory to the ASEAN Framework Agreement on Visa Exemption, allowing ASEAN nationals visa-free entry for 14–30 days.

The country's tropical monsoon climate also influences tourist arrival patterns. The peak tourism season occurs during the cool dry period from November through February, with fewer international arrivals in the hot dry months of March and April. Intra-regional tourist arrivals are less seasonal than long-haul arrivals from Europe and North America. In recent years there has been a spike in visitors from the PRC during the Chinese Lunar New Year. The Lao PDR has a growing affinity for travel and tourism. In 2019, there were 2.3 million domestic tourists and more than 2.6 million outbound trips among a population of only 7 million (Government of the Lao PDR, MICT 2019).

TOURISM ENTERPRISE SURVEYS

The 2019 Tourism Enterprise Survey

In July–August 2019, ADB carried out a survey of accommodation and food enterprises in four popular tourist destinations in the Lao PDR: Louangphabang Province, Vangviang District, Vientiane Capital, and Champasak Province (Box 1 and Figure 1). It covered all registered establishments employing six or more persons in the resort, hotel, and restaurant subsectors; and those employing three or more persons in the guesthouse subsector. The 2019 survey was conducted by face-to-face interviews and covered 366 enterprises.³

Of the surveyed enterprises, a majority (89%) were accommodation enterprises, while the rest were restaurants. On average, the accommodation enterprises had 35 rooms and employed 18 employees, of which 55% were female. Less than half of the overall number of guests were domestic, however, the distribution across destination varies. For example, only 20% of the guests in Louangphabang were domestic compared with 62% in Vientiane Capital. About half of the guests in Champasak were domestic (Table 1).

³ The survey closely followed the 2018 Tourism and Hospitality Enterprise Survey of Employment and Skills in the Lao PDR (ESS) methodology. The ESS is the Lao PDR's most comprehensive tourism and hospitality sector survey, covering 17 provinces and Vientiane Capital. It includes the accommodations, restaurants, entertainment, travel services, and handicraft subsectors. We are grateful to Luxembourg Development Cooperation Agency for allowing us to use the 2018 ESS survey data.

Box 1: Survey Destinations

Louangphabang Province in the northern part of the Lao People's Democratic Republic (Lao PDR) is a well-established tourism destination. It has 224 cultural, natural, and historic tourism sites, including the town of Louangphabang, a United Nations Educational, Scientific, and Cultural Organization (UNESCO) World Heritage site. In 2019, Louangphabang received about 638,000 international visitors and 222,000 domestic tourists. International visitors are evenly divided between inter-regional and intra-regional. This sharply contrasts with the rest of the country where intra-regional tourists dominate.

Vangviang is a small town in Vientiane Province, strategically located midway between Vientiane Capital and Louangphabang on Road No. 13 North, the country's main north-south transport artery. Vangviang was formerly a low-budget backpacker destination. Recently it has reinvented itself as a family-friendly nature and adventure destination to attract high-spending tourists.

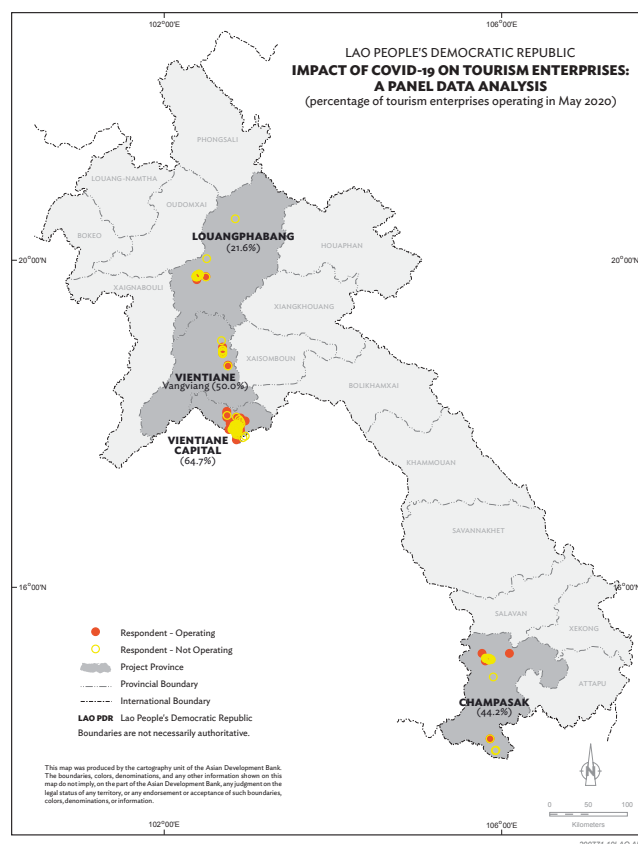
Vientiane Capital is the economic center of the Lao PDR, hosting commercial establishments, government offices,

Source: Authors based on data from MICT (2019).

and international organizations. It also has several of the Lao PDR's iconic cultural attractions, the country's largest and busiest international airport, and is connected to Thailand by the first Lao-Thai Friendship Bridge. Vientiane Capital received more than 1.8 million international visitors and 1.3 million domestic tourists in 2019. Two-thirds were intra-regional visitors from members of the Association of Southeast Asian Nations

Champasak Province is in southern Lao PDR bordering Cambodia and Thailand. Major attractions include Vat Phou and Associated Ancient Settlements within the Champasak Cultural Landscape, a UNESCO World Heritage site, and Khone Phapheng waterfall in Siphandone (4,000 Mekong River islands). Champasak's Bolaven Plateau is a growing agritourism destination with rich volcanic soils and a cool climate. In 2019, Champasak received 1 million international visitors and 292,000 domestic tourists. Most international visitors are from neighboring Thailand.

Figure 1. Map of Operating and Temporarily Closed Enterprises in May 2020



Source: Authors based on survey data.

Table 1. Results of Accommodation Enterprises Survey, August 2019

Destinations	Tourism Enterprises Surveyed	Share of Hotels ^a	Characteristics of Accommodation Enterprises			
			Average Number of Rooms	Average Number of Employees	Share of Female Employees ^b (%)	Share of Domestic Guests (%)
	(A)	(B)	(C)	(D)	(E)	(F)
Vientiane Capital	190	89.0	37.2	16.2	53.4	62.5
Louangphabang	76	84.2	26.0	25.3	56.1	16.5
Vangviang	35	100	52.3	20.0	63.0	32.1
Champasak	65	90.8	32.0	12.5	56.4	50.4
Total	366	89.3	35.3	17.6	55.3	48.5

^a Hotels include resorts and guesthouses.

^b Includes temporary and permanent employees.

Source: Authors' calculations based on survey data.

May 2020 Follow-Up Survey

To assess the impact of COVID-19 on the tourism enterprises interviewed in 2019, we conducted a follow-up survey using online questionnaire with operator-assisted phone interviews. In the survey, we asked tourism enterprises about their current operations and employment. Of the 366 enterprises interviewed in 2019, we were able to reinterview about 89% of them in May 2020. The attrition rate was relatively high in Louangphabang at 16%. The high attrition rate may suggest that the missing enterprises in Louangphabang were closed, as it was difficult to reach employees at the contact information collected in the 2019 survey. This interpretation is supported by the finding that only 22% of Louangphabang tourism enterprises surveyed in 2019 were operating either fully or partially in May 2020 (Table 2). If we consider the missing

enterprises, the operation rate would be even lower. In Vientiane Capital, about 65% of the enterprises were operating, in Vangviang about 50%, and in Champasak 44%.

Since 2019, 70% of tourism enterprises surveyed had reduced employees, cutting employee numbers by 38%. A larger number of female employees (40%) were laid off compared with male employees at 34%.⁴ Even in Vientiane Capital, where many enterprises were still operational, about 65% had reduced employees. In Louangphabang and Vangviang, more than 80% of these enterprises had cut back more than 50% of their employees. The impact of COVID-19 is more severe in Louangphabang and Vangviang, where tourism enterprises mainly target international and leisure tourists, than in the other two destinations.

Table 2. Tourism Enterprises under COVID-19 in the Lao PDR, May 2020

Destinations	Among Resurveyed in 2020					
	Resurveyed in May 2020 (%)	Operating in May 2020 (%)	Reduced Employees since May 2019 ^a (%)	% Change in Employees ^b		
				All	Female	Male
	(A)	(B)	(C)	(D)	(E)	(F)
Vientiane Capital	88.9	64.7	65.1	-33.5	-35.4	-29.6
Louangphabang	84.2	21.6	82.8	-52.1	-54.9	-48.2
Vangviang	100.0	50.0	82.9	-50.9	-56.2	-38.8
Champasak	90.8	44.2	62.7	-28.3	-28.6	-26.1
Total	89.3	51.6	70.0	-38.2	-40.3	-33.6

^a Data include all surveyed enterprises, not just those operational in May 2020.

^b Includes temporary and permanent employees.

Source: Authors' calculations based on survey data.

⁴ To account for tourism seasonality, we have asked about changes in employment since May 2019.

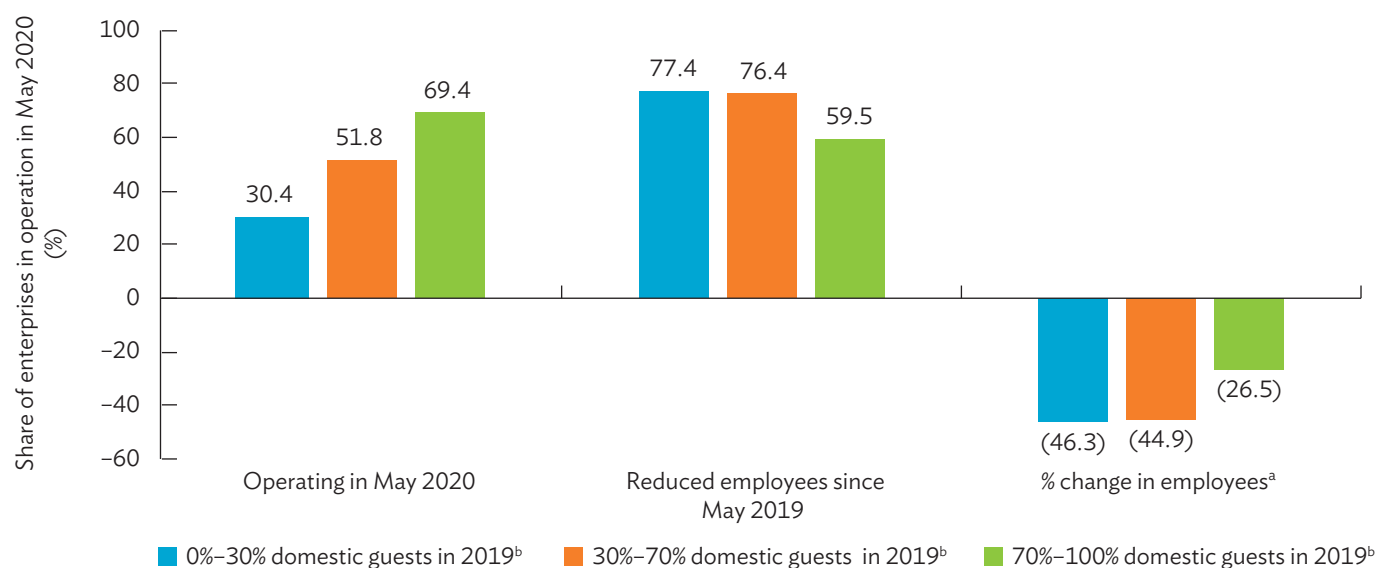
To assess the impact based on domestic or international orientation of tourism enterprises, we divided the accommodation enterprises into three groups based on the proportion of domestic guests in August 2019 (Figure 2). The results are clear. Only 30.4% of accommodation enterprises that targeted international guests remained open in May 2020.⁵ On the other hand, 69.4% of enterprises that targeted domestic guests remained open.⁶ Regarding employee reductions, enterprises that targeted international guests laid off 46.3% of their employees, while enterprises that targeted domestic guests cut down employees by 26.5%. This indicates that enterprises that target domestic guests are more resilient, and that promoting domestic tourism should be part of the Lao PDR's COVID-19 recovery plan.

Financial Situation

About 55% of the enterprises surveyed said that they have enough savings or access to immediate credit, to remain

(or resume) in business for about 5 months.⁷ Financial security varies across provinces. In Vientiane Capital, 55% of enterprises reported having enough savings to last more than 5 months, while in Louangphabang only 48% have enough savings for 4.4 months. Note that the numbers in Table 3 could be biased because of attrition. It is likely that the enterprises we were unable to contact for the 2020 survey are worse off than those interviewed. About 38% of enterprises responded that they would need to borrow money to restart their business if the tourism downturn continued beyond May 2020. The percentage is highest in Louangphabang at 44%, wherein more than 67% of the enterprises said they would apply for the government's low-interest small and medium-sized enterprise (SME) loan programs. As mentioned above, Louangphabang has the highest attrition among the four destinations.⁸

Figure 2. Tourism Enterprise Operation by Domestic Orientation



^a Includes temporary and permanent employees.

^b Asked in the 2019 survey.

Source: Authors' calculations based on survey data.

⁵ Enterprises that target international guests are defined as enterprises with less than 30% domestic guests in August 2019.

⁶ Enterprises that target domestic guests are defined as enterprises with more than 70% domestic guests in August 2019.

⁷ Immediate credit from relatives or friends, not from formal financial institutions.

⁸ Informal discussions with members of the Lao PDR tourism industry associations suggest that while there is willingness to borrow for capital investment, there is less demand to take on debt financing to cover day-to-day operating costs and salary payments.

Table 3. Financial Resilience of Accommodation Enterprises by Province

Province	Have enough savings? Yes (%)	If Yes, for how many months?	Need to borrow money from financial institutions to restart beyond May 2020 (%)	Would you apply for government loan for SMEs? (%)
	(A)	(B)	(C)	(D)
Vientiane Capital	55.4	5.5	35.5	57.1
Louangphabang	48.4	4.4	43.8	67.2
Vangviang	60.0	3.6	37.1	60.0
Champasak	55.2	5.4	36.2	53.4
Total	54.5	5.0	37.5	58.8

SMEs = small and medium-sized enterprises.

Source: Authors' calculations based on survey data.

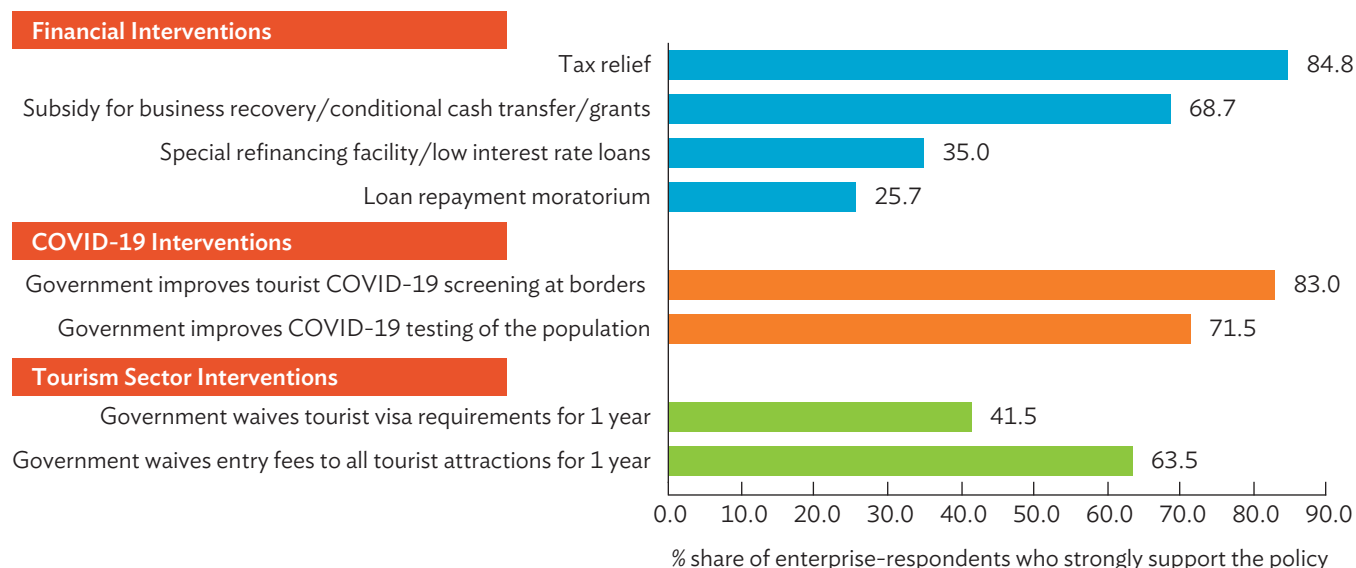
Demand for Government Intervention

As shown in Figure 3, the surveyed enterprises most favored government policy interventions in the form of tax relief (84.8%) and cash transfers (68.7%). However, the demand for special refinancing and loan repayment moratoriums are generally low at 35.0% and 25.7%, respectively. This is not surprising given the limited use of formal financial institutions for individual credit needs in the Lao PDR. Only 9% of adults (aged 15 and above) borrow from financial institutions while 31% borrowed from family and friends (World Bank 2017).

Concerns about safety and the need to rebuild consumer confidence and demand are reflected by the high percentage

of respondents that strongly support improved COVID-19 screening at borders (83.0%), improved COVID-19 testing for the population (71.5%), and a 1-year waiver of entry fees to all tourist attractions (63.5%). This view is consistent with the finding in an earlier study conducted in Macau, China in February 2020 (Fong, Law, and Ye 2020). By using a phone survey of 228 residents the study found that the respondents' outlook for the tourism industry depended on their government's ability to control the COVID-19 epidemic. They were more confident about the outlook of the tourism sector if they had a favorable view of the government's ability to control the epidemic.

Figure 3. Tourism Enterprises Supporting Possible Government Policies



Source: Authors' calculations based on survey data.

CONCLUSION

The “sudden stop” in tourism arrivals and receipts caused by the onset of COVID-19 is expected to have a devastating impact on tourism enterprises in the Lao PDR. More than half of the 327 tourism enterprises that participated in the May 2020 follow-up survey were temporarily closed and have reduced employees by 38%. The impact is larger for enterprises that mostly served international guests. This suggests that enterprises that target domestic guests are more resilient, and therefore promoting domestic tourism should be part of the Lao PDR's COVID-19 recovery plan.

The UNWTO (2020c) also recommends initiating programs to stimulate travel among locals, who are expected to be among the first to travel after the pandemic. Viet Nam and Thailand have already created programs to reignite domestic tourism (Pearson 2020; *The Nation Thailand* 2020). Furthermore, the Lao PDR may consider joining “COVID-safe travel zones” or “travel bubbles” by signing an agreement for unrestricted travel of tourists from countries that have been more successful in containing the spread of COVID-19—for example, Viet Nam; Hong Kong, China; the Republic of Korea; Australia; and New Zealand (*The Economist* 2020).

COVID-19 response and recovery options favored by the enterprises in our survey are consistent with recently issued UNWTO (2020d) guidelines and priorities to restart tourism,

which include providing businesses with liquidity and protecting jobs, recovering confidence through safety and security, and opening borders responsibly.

Other preferred government interventions include tax relief and cash transfers. These policies are essential in the short and medium term to support cash flow of the enterprises, so that they can stay in business. A larger share of enterprises in operation also implies fewer job cuts. Finally, tourism enterprises favor improved COVID-19 screening at borders and expanded testing for the population. This suggests that they are worried about an increased risk of infections from domestic and foreign tourists, and recognize the need to rebuild consumer confidence to travel. Expanded testing is important because domestic tourists will lead the recovery, and international tourists are likely to require testing as a prerequisite to cross international borders once they reopen.

The Lao PDR is generously endowed with natural, cultural, and historic attractions. The rapid increase in international visitors and underlying factors that supported tourism growth before the COVID-19 pandemic indicate that the tourism sector can play an important role in the socioeconomic development of the country and reduce growing inequality. However, in the short to medium term, the tourism sector needs assistance to survive the current crisis and prepare for recovery once the pandemic subsides.

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Notes:

ADB recognizes “Laos” as the Lao People’s Democratic Republic, and “Vietnam” as Viet Nam.

In this publication, “\$” refers to United States dollar.



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