Final Report on

Destination Laos Tourism Marketing Research

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EXECUTIVE SUMMARY

The Covid-19 pandemic and its accompanying restrictions have caused an unprecedented disruption to tourism around the world. Laos initially responded to the crisis by swiftly closing borders and protecting its citizens. For the most part, the Covid-19 situation allowed Lao people internal mobility, so domestic travel was heavily promoted.

Initiated just a year ago, the *Lao Thiao Lao* domestic tourism campaign provided a lifeline for a tourism industry on the brink of total collapse. While not a perfect solution, it offered some stop-gap relief for businesses while raising awareness of domestic tourism sites in Laos among the local population.

The domestic market can be understood through the lens of five *personas* (tourism personality types). Through these personas, we can see that the impossibility of international travel, Covid-19 fatigue, pent-up demand, philanthropy, and the success of the *Lao Thiao Lao* campaign, are factors incentivizing many travelers to go beyond their home provinces. More specifically, it is expatriates and upper income bracket Lao that are keeping what is left of the industry alive, especially the high-end sector. Lastly, NGOs and government bodies make up the bulk of the domestic MICE market that bring short sporadic surges in select tourism economies whose benefits to the supply chain.

Meanwhile, strategies are being implemented by foreign governments to try to jumpstart international tourism. From Thailand’s Phuket Sandbox to Singapore’s SG Clean, state-backed initiatives have received mixed levels of success due to inconsistent communication, reactive policies, and changing circumstances as the pandemic develops. At least for the foreseeable future, health safety will become a fundamental new dimension that has been irrevocably embedded in tourism policy. However, at least for most tourism-dependent countries, increasing economic and political considerations will play a bigger role in decision-making. Lastly, the pandemic is expected to drive tourists to rely more on credible and official sources online, while neighboring countries close to home may drive the bulk of the first post-pandemic travelers, especially with the current limited number of long-haul flights. A preference for nature-based and outdoor activities is expected to increase.

New directions in marketing Laos can be devised through careful examination of consumer travel trends, needs, and desires as the world shifts from responding to Covid-19 as a pandemic, while the virus becomes endemic. However, it is the case that continual flexibility and adaptation will be required by all parties in all sectors. It remains to be seen whether Covid-19 will prove to be a truly transformative event or simply a temporary shock to a resilient system that will heal in the upcoming years.

RESEARCH - PREVIOUS LAO CAMPAIGNS

Lao Thiao Lao

Launched in September 2020, the *Lao Thiao Lao* campaign has promoted domestic tourism in Laos by placing a focus on social media channels and making use of established influencers. With a primarily young target audience, the campaign has been designed to feel youthful, energetic, and fun. Special offers, giveaways, and prizes in the form of in-kind sponsorships from the private sector have become a mainstay of the campaign and a way to attract new audiences.

Lao Thiao Lao has been effective in promoting domestic tourism, despite being impeded by intermittent lockdowns and interprovincial travel restrictions. The program created a forum for tourism stakeholders to collaborate by promoting tourism-related material through a range of conventional and digital media.

The Official Facebook Page has gained immense popularity, reaching audiences both domestically and abroad. It is estimated that the total number of unique users reached over the past 12 months is **5,285,929**. Surprisingly, Facebook content reached people in Thailand (6.1% of total audiences reached), Vietnam (1.4%), the United States (0.7%), Australia, Cambodia, France, and China, Japan, and South Korea.

Short interviews via email and phone calls were held with private sector stakeholders during which they gave feedback on the *Lao Thiao Lao* campaign. In general, the campaign was positively received by the private sector, with business operators praising the campaign as an informative central platform for tourism in Laos. Many of them said that they noticed their business had received greater local recognition as a result of the campaign, while a small number suggested that the addition of more cultural experiences, particularly surrounding ethnic minorities, would help make for a more well-rounded campaign. One interviewee even recommended an awareness sub-campaign on travel manners for domestic travelers. Finally, most stakeholders wished for continued donor support for marketing their businesses on the *Lao Thiao Lao* platforms.

While the campaign received steady coverage among domestic media outlets, it received favorable attention on regional media platforms as well. Steve Thomas of the South China Morning Post notes optimistically that “many townspeople are now hoping that a focus on the domestic market, which has never seriously been considered before – allied with the government’s “*Lao Thiao Lao*" initiative, launched in September and aimed at promoting sustainable and nature tourism to the domestic market – will see them through to brighter times, which may be very different to the recent past." (Thomas, 2021). In an article for Travel and Leisure Asia, Vincent Vichit-Vadakan writes positively about the campaign, noting that "the *Lao Thiao Lao* Facebook page offers locals and expatriates all kinds of deals around the country. In addition to discounted plane tickets, great deals on hotels and special packages, the page features popular contests and giveaways." (2021). Julia Winterflood of Travel Weekly Asia commends the SingapoRediscovers and *Lao Thiao Lao* campaigns as "particularly strong attempts to boost domestic tourism." (2021).

Visit Laos Year 2018

Launched in late 2017, Visit Laos Year 2018 had the goal of attracting more visitors to Laos and thereby boosting flows of revenue through the service and production sectors. Visit Laos Years were previously organized in 1999-2000 and again in 2011-2012. While lofty goals of 5 million arrivals and $900 million in revenue were set for the year, by the campaign's end arrivals only reached 4.1 million tourists, and $811 million in revenue was earned.

According to TTR Weekly, "the Visit Year promotion unfolded with very little to show in terms of online promotions in important source markets, specific incentives for tour operators, projects to raise air connectivity and new Visit Year specific events or festivals" (Ross, 2019). In Laos itself, the Minister of Information, Culture and Tourism, Prof. Dr. Bosengkham Vongdara, attributed the visitor shortfall to floods that occurred in the rainy season, along with inadequate tourist facilities and poor road access to tourist sites. The minister also cited inadequate air transport, the slow development of tourist attractions, and slow service at immigration points.

Tour operators also cited difficulties encountered during Visit Laos Year 2018, including the cost of entrance fees to popular attractions and expensive plane fares, as well as poor service by immigration officials. Some said services in hotels were not up to standard, roads leading to tourist sites were in poor condition, and the areas and roads around tourist sites were messy, especially in the rainy season. They also said the authorities should look further ahead when planning tourism promotions, pointing out that Visit Laos Year 2018 was not announced sufficiently ahead of time for visitors to learn about it and plan visits. (Souliyong, 2019)

Visit Laos-China Year 2019

In a bilateral effort, a Visit Laos-China Year was inaugurated in 2019. The goal was to attract one million Chinese tourists to visit Laos. Both nations held various colorful activities throughout the year including a Chinese Cultural Week in Vientiane which featured performances from visiting artists, and a Mid-Autumn Festival as well as other Chinese cultural performances in Luang Prabang province and the capital. Lao authorities also staged a cultural show in Fujian province, China. During Visit Laos-

China Year 2019, local provinces prepared numerous activities, and tourism facilities were upgraded to welcome visitors. (Vientiane Times Reporters, 2019). Lao Airlines also introduced new air routes including Shanghai, Chengdu, Changsha, and Wenzhou to help facilitate this event. By the year's end, Laos was able to achieve over one million tourist arrivals from China.

RESEARCH - DOMESTIC MARKET

While international tourism injects foreign currency into a country, domestic tourism can be understood as redistributing currency within that country's borders. Attracting local tourism to undeveloped areas can have a proportionally greater effect on the welfare of the resident population than the same amount of tourism might have on more developed parts of the country.

During the time of Covid-19, domestic tourism serves as a means of keeping the fragile industry afloat until international borders reopen. Thus, in order to devise a marketing plan, a detailed understanding of the different types of consumer segments that make up the domestic market is needed.

This will necessitate an empirically grounded overview of the market's buyer personas. Our main research question is as follows: *what are the characteristics of the different subsegments of Laos' domestic tourists?*

METHODOLOGY

In order to strike a balance between breadth and depth, a qualitative study using a combination of semi-structured interviews coupled with ethnographic techniques such as passive participant observation was employed.

RESULTS

Interview and ethnographic data permit us to gain rich descriptions of the types of people engaged in tourist activities in Laos. The personas in this study are not designed to be an exhaustive list, but a starting point from which to understand the behaviors of domestic tourists. While the narrative accounts are taken from real-life groups, the personas are to be conceptualized not as exclusive representations of the segments from which they are taken but as snapshots of behaviors that could potentially cut across age, gender, provincial, and even national lines.

Persona Group A: *Middle-income, Lao Retirees* (Aged: 60-70)

This group, made up of retirees and elderly people, enjoys group travel to well-known locations by private car. With an abundance of time and disposable income, the group is able to travel at their own pace and enjoy leisure activities where available. Food is highly important to this group, who enjoy trying local delicacies as they travel. They will spend on souvenirs as gifts for family and friends, but also to contribute to the local economies of the provinces they visit. Travel is usually unplanned and can be extended as necessary. Motivation to travel is driven by religious or seasonal events or invitations from friends or family in other provinces. This group has a rudimentary understanding of how to use social media, including the Facebook and Whatsapp platforms.

Persona Group B: *Wealthy, Privileged Young Adults (Ages: 25-40)*

These individuals wield significant purchasing power and have cultivated tastes. Being native to Laos, they are less interested in cultural or natural experiences in their home country. When traveling outside of their home provinces, members of this group do not consider themselves engaging in tourism, but rather simply having a good time. What they yearn for is what reminds them of their time abroad: foreign food and international-level service. Finally, while the "*international*" factor is certainly given a high value, these nouveau-riche are just as loyal fans of local eateries as any other local.

Persona Group C: *Expatriates With No Children (Ages: 32-40)*

This group includes foreign residents who have been living in Laos for some time. They usually enjoy outdoor activities and cultural experiences, traveling solo, as a couple, or in an unstructured group. They may plan a trip together, however, each day's activity may be undertaken either individually or in separate, smaller groups. Members of this persona grouping tend to research their destination thoroughly and prefer to make travel bookings in advance by email. The group uses Facebook and Instagram to be inspired by others and to post their own travel experiences, reaching and potentially influencing other foreigners and expatriates in both Laos and their home countries.

Persona Group D: Couples With Young Children (ages: 30-45)

When making travel plans, this group prioritizes the safety, comfort, and enjoyment of their children due to a heightened feeling of threat sensitivity. This is the result of lower-risk preferences brought about by the appearance of kids at this stage of their lives. It is evident that these families are willing to spend money if the proper activities are offered in a safe and appealing manner. Otherwise, these families will have very limited choices and are destined to repeat similar experiences every year. Their fundamental motivation for traveling appears more to be driven by a desire to escape from their home provinces than an attraction to other destinations outside the city - especially on the facilities and service fronts.

Persona Group E: Lower to Middle-Income Group Travelers (Ages: 25-45)

This group of domestic tourists, made up of low-ranking civil servants and office workers, enjoys making short trips to nearby attractions within their own locality or to neighboring provinces - often a waterfall or lake area. They will travel in small groups of family and close friends, typically packing their own food and provisions and using their own vehicle, often a pickup truck or minivan. They tend to choose budget accommodations. With rising income, this group has recently begun to travel for leisure but remains unaware of travel etiquette, often creating pollution - both waste and noise. While WhatsApp and Facebook are part of their digital information diet, they have been flocking to the TikTok platform in droves.

Persona Group F: Business Meeting Travelers (Ages: 25-60)

Civil servants, development workers, and businesspeople comprise this tourism segment, which accounts for the bulk of convention/meeting room revenue in Laos' larger hotels. Government departments, NGOs, and businesses often hold staff training, policy discussions, signing ceremonies, and other meetings in large hotels in Vientiane Capital, Vang Vieng, Thalat, Luang Prabang, and Pakse, which can cause surges in accommodation occupancy as well as positive spillover effects in the tourism supply chain during these events. These travelers also must comply with organizational health regulations, so events may be subject to sudden postponement or cancellation.

DISCUSSION

The following is a point-by-point discussion of the data.

Being "tourists" in their own country.
Many Lao people do not perceive themselves as being tourists. Pre-planning is minimal, and tightly defined itineraries are rare. Even in the latter case, it is often easy to deviate from the intended agenda of the trip. This is possibly due to several factors: a shared common language and culture, repeated trips, and mode of transportation.

While there are undoubtedly marked differences between regional and provincial cultures, many residents in Laos perceive themselves as part of the same socially constructed community, whereby trust is shared among those considered "Lao." Being able to speak the language and eating similar types of food has the effect of reducing uncertainty even in the most remote of provinces.

Being born and raised in Laos generally means that you have been to a number of provinces for a variety of reasons other than holiday-making. This reduces the novelty of an inter-provincial trip, even when the specific circumstances surrounding the trip are different.

Meanwhile, the mode of transportation is important. When traveling in a privately-owned car, the travelers gain a sense of convenience and control during their trip as if a piece of home is being taken with them. In extreme cases, some do not feel that they have left at all.

Even while traveling by air, Lao people will remain among Lao-speaking passengers and crew on domestic airlines, contributing to the feeling of "*not having left home.*" Finally, while excitement could be found in the exploratory and unplanned aspect of the trip, there are diminishing returns to the domestic traveler's curiosity as their age and income increase.

Traveling is almost always a social affair.
Solo travel is almost unheard of among Lao travelers, as it is no secret that Lao people love to have company during any recreational activity. Whether it be with immediate or extended family or close friends, Lao people tend to travel in groups and generally engage in activities together. In the few cases where a Lao person is traveling alone, it is usually to attend a social event or join another group that has already arrived at the destination. In contrast, expatriates based in Laos tend to exhibit disparate behaviors and interests. Some expatriates do enjoy solo travel, however, there may be a positive correlation between length of stay in-country and a tendency to want to travel with others. As they meet other long-term expatriates and friendships are formed, group travel becomes more common.

The interviews suggest that the *strength of the ties* matters less to expatriates than they do to their Lao counterparts. While Lao people are inclined to include very close friends and family members in their holidays, expatriates are more comfortable traveling alongside acquaintances or colleagues. This is likely for two reasons, firstly because their own families and close friends are not present, and secondly, because a camaraderie built around a shared sense of "foreignness" helps to foster bonds more quickly.

Expatriates are Hybrid Tourists.
Expatriates possess many of the characteristics of foreign independent tourists (FIT). Those who have only spent a few years in Laos retain foreign currency, seek out authentic cultural, natural, and rural experiences, and are driven by a fervent desire to see and experience as much as they can during their limited time in the country.

As mentioned above, expatriates are comfortable traveling with a mix of friends and acquaintances, and, when at the destination, are happy to separate and engage in different activities. However, many are cognizant of the ploys of so-called "tourist trap" establishments which they believe to be overpriced and often oblivious to what expatriates want. While they do tend to stay away from these Lao-owned restaurants that offer non-Lao dishes, there is only so much Lao food they can take. It is often the case that expatriates would frequently patronize foreign-owned restaurants serving what they perceive to be more authentic cuisines from abroad (Chinese, Korean, Japanese, Indian, French, Italian, etc).

It is worth noting that expatriates use a variety of social media platforms, and are part of online social networks that go far beyond Laos, where the social media posts of their travels have proven to be what industry academics call effective electronic word-of-mouth marketing (eWOM).

Laos is a “small city” for the rich and their entourage.
A weekend vacation or a few days off in another province is often only a short trip away by road or air, especially if it revolves around a birthday party, event, or religious ritual.

High-income Gen-Z and millennials are waiting for the opportunity to go abroad and enjoy the luxuries lacking in Laos. Their purchasing power and diverse travel experience incline them towards high-end restaurants and hotels - typically in more developed provinces, including Luang Prabang, Vientiane Capital, Champasak, and recently in Oudomxay. Modern, classy lounges and coffee shops that remind them of their trips to Bangkok, London, Singapore, or Sydney, are the ones that end up on Instagram in very stylish posts.

For those that are unmarried, obligations are minimal, making way for travel plans to happen without hesitation. Thai Baht and USD are currencies of choice and come in handy when paying for high-cost services such as foreign-style foods. While comprising a small market, these are the ones keeping the high-end tourism establishments alive, the secondary economic effects of which trickle down to local producers and suppliers.

Digital technology facilitates travel in multiple ways.
All of our data show Facebook and Instagram as the primary platforms on which content is both consumed and produced. Like many others, Lao people like to engage with social media through passive NewsFeed scrolling and through this process then *stumble upon* algorithmically selected content related to travel.

Apart from the coordinated *Lao Thiao Lao* campaign, travel content in Laos is mainly produced by a handful of volunteer travel bloggers. These travelers are equipped with talent and professional gear which have earned them large followings on their Facebook Pages. They are primarily self-funded but sometimes collect advertising fees from sponsors.

A small subsegment of urban, wealthy, notably female (~60%) users use Instagram due to its focus on photographs with less discussion or link sharing. An unknown percentage, but likely large, number of people are exploring new content on TikTok. However, Facebook is the go-to platform for consumers to interact with businesses directly and when payment needs to be made, the transaction is migrated to WhatsApp or continues on Messenger.

While expatriates and educated Lao often see and post travel content on social networking sites, they also supplement their information intake from the wider web, especially Google which leads them to travel websites.

The huge untapped potential market for families with spending power.
For families who have kids below teenage years, a lack of children-focused activities in the provinces amounts to many missed opportunities. A concern for safety and cleanliness with regard to food and facilities is present among parents. Vientiane Capital, as the country's commercial hub, stands as the benchmark for these kinds of activities, in terms of quality and price.

Fresh markets are the equivalent of provincial shopping centers.
Older Lao tourists find pleasure and novelty in visiting fresh markets, which showcase many of the products that the local area has to offer. Fresh markets then constitute an ideal provincial substitute for urban shopping centers, where fresh products like seasonal fruits, vegetables, and meats are brought home in lieu of other conventional souvenirs.

Covid-fatigue could moderate fear of the virus and incentivize travel.
While caution is taken while interacting with strangers, behavior among vaccinated friends and family suggests the establishment of widening circles of trust or "social bubbles". In such bubbles, hand sanitizers are not used frequently and masks are removed during trips. A perceived low mortality rate, courage resulting from vaccination, a lack of awareness of severe cases, and above all, second-hand accounts of asymptomatic and mild cases of a recovered friend were cited as reasons for letting their guard down. It is expected that once lockdown measures are eased or lifted, fear of getting infected is not expected to be a major hindrance to domestic travel, especially in provinces perceived to have low infection rates.

Other notable observations from tour operators and travel experts:

- Private car rentals seem to be the transportation of choice for some expat holiday behavior
- A large number of young Lao (20-32) are traveling in groups to nearby nature areas to enjoy a picnic, usually involving alcoholic beverages and snacks

- An estimated ten percent of what is left of the local tourism industry is kept financially afloat by catering to the personas described above
- Vientiane Capital attracts domestic business travelers but few leisure visitors
- The Vientiane to Vang Vieng Expressway has brought more visitors to Vang Vieng and to areas between and beyond

LIMITATIONS

Limitations to the study include a heavy focus on residents of Vientiane, which may not be directly applicable to the whole country. The research team used its best judgment to determine the broad types of tourist persona groups that have historically made up the majority of domestic tourists with the ten interviewees among those in the researchers' network of available contacts. With the Vientiane-bias, it is possible that the level of depth and accuracy could vary between groups outside of the capital city.

RESEARCH - INTERNATIONAL TOURISM LANDSCAPE

If Laos is to jumpstart its tourism sector, it becomes necessary to have an understanding of the most current trends in the global tourism landscape, the ever-changing policies of governments, and potential modifications to tourist behavior during the post-pandemic era. Our main research question is: "**what would post-pandemic tourism look like?**"

METHODOLOGY

This study employs a mixed-method approach, consisting of desk research and interviews. Data emerging from academic sources allow us to gain the latest theoretical insights from a broad spectrum of the latest tourism scholarship. With the tourism landscape being subject to a constant state of flux, the most up-to-date and available information comes from news reports and interviews with regional travel company representatives. To obtain this information, interviews were conducted in a semi-structured manner using a purposive sampling method, selecting veteran tour operators and experts in Laos and the region.

RESULTS/DISCUSSION

Travel experts Wilson and Chen assert that the pandemic has given rise to a new and fundamental dimension in tourism: *health security* (2020). One implication is that a destination's perception of Covid-19 safety relative to its neighbors will make it more attractive to tourists. This also means that exposure to Covid-19 and the risk of contagion must be kept to a minimum in all aspects of the tourism experience. Decision-making by tourists during periods of global health issues can be considered in three broad criteria:

- **Criterion 1:** Travelers will evaluate their own health and readiness for travel, including concerns regarding underlying conditions, vaccination status, and a personal threshold for risk.
- **Criterion 2:** Travelers will research and evaluate conditions en route to the destination and after arrival, including the perceived level of healthcare infrastructure in the country; health protocols at hotels, restaurants, and tourism sites; density of seating on various forms of transport; and options for physically distanced touring.
- **Criterion 3:** Travelers will evaluate policies that may affect them throughout the trip, including insurance requirements, testing and quarantine required in the destination, and testing and quarantine required to return home. (Wilson & Chen, 2020).

Topic 1: Health security will help determine the image of a destination but revenge spending and Covid-19 fatigue are expected to be moderators to this phenomenon.

Criterion 1 deals with personal and internal factors of travel readiness which vary in each individual. Travelers must consider their own personal risk factors in developing severe complications with Covid-19, such as obesity, cardiovascular issues, and other underlying conditions, as well as their own vaccination status.

Due to risks involved with areas of highly dense populations, and traveling in general, when people do travel, they may be interested in being out in nature and away from crowded places. According to a study of travel executives from around the world (Travel Consul, 2021), travelers most often ask for: solo travel (41%), all-inclusive hotels and resorts (39%), hotels and resorts (38%), small group holidays (22%), and fly-drive packages (21%). Based on this information, experiences where people do not need to be so close to other people will be heavily sought after, or when they do travel in groups it is among families or friends.

Due to potential administrative difficulties in visiting many countries on one trip, experts are noticing trends of travelers staying in one country for longer. With more time to spend, travelers will be able to go beyond standard city tours in main tourist areas and visit even more of the country. “Cuisines and outdoor adventures – I would focus on those in the early phases of reopening. Go deep into each one – and tell engaging, shareable stories about why those experiences are unique, photogenic, and more enticing in Laos than in neighboring countries,” recommends Gary Bowerman of Check-in Asia (2021).

It is also important to consider that over the past 18 months, people around the world have spent varying periods confined in their houses, trying to manage home life, school life, and work life, simultaneously. The stress caused by this type of lifestyle, compounded with health fears outside the home, is manifesting itself into a great release when domestic and international movement restrictions are lifted. Now allowed to dine-in at restaurants, and even travel, people are “revenge spending” to make up for perceived lost time spent at home during the pandemic (Adamczyk, 2021).

While international leisure travel restrictions remain in place throughout much of Asia, there is evidence that this phenomenon of pent-up demand is occurring as movement restrictions are lifted. In China, for example, where citizens are not yet allowed to travel abroad without stiff quarantines on return, a great resurgence in domestic travel has been recorded, surpassing even 2019 figures (Chen, 2021). China’s luxury travel segment, which previously would have traveled abroad, is now opting for high-end travel in their own country in order to avoid onerous quarantine restrictions upon return. Domestic travel activities now include yachting around Hainan Island, taking road trips in luxury vehicles, flying around the country in private jets, or trekking in remote western regions, all the while garnering likes on social media.

This surge in domestic travel demand will likely shift back into international travel demand when conditions permit, as Sienna Parulis-Cook, director of marketing and communications at Dragon Trail, a China-focused digital marketing agency explains.

“I would say for high-net-worth travelers, where travel is part of their lifestyle, it's much less about having a newfound preference for domestic travel. But rather, current restrictions make outbound travel unappealing in many ways. It’s not only inconvenient but also looks bad and irresponsible.” (Springer, 2021).

Thomas Cook’s 2021 bookings have been overtaken by bookings for 2022. “What we’re selling for 2022 is higher-priced, longer-stay holidays for large groups,” said spokesman David Child, adding that the type of holidays being booked indicated a desire for big “blow-out” trips next year (Choat, 2021).

Travel companies are also receiving more enquiries from new customers, as they want the financial security of booking through a company, after a disruptive period in the travel sector (Barry, 2021).

Some analysts are proponents of the black swan theory, which posits that once an unexpected event of great socio economic impact (e.g. Covid-19) has passed, it becomes rationalized, making it seem predictable in hindsight and that its occurrence was anticipated (Taleb, 2007). It is expected that we will gradually return to a situation relatively similar to that which existed pre-pandemic (Navarro Jurado et al., 2020). In other words, substantial change to the tourism sector is not envisioned, at least in terms of planning and management (and even marketing).

However, some academics suggest that even if the Covid-19 crisis ends relatively soon, returning to pre-pandemic levels of travel will be inadvisable due to the levels of environmental damage brought about by the industry, which was already unsustainable. (Fletcher et al. (2020). It is possible that we could be seeing a rise in the demand for more sustainable and environmentally friendly forms of tourism.

Topic 2: Health-security permeates all government policy but we are slowly seeing the transition from pandemic to endemic.

The Government of Laos has done an exceptional job in seeing the country through the Covid-19 crisis with a relatively low number of fatalities and a decent vaccination rate. But the task is far from over, as policies still require re-examination and retooling for a post-Covid era.

Regional expert opinion varies slightly on when exactly Laos might be ready to receive visitors again, but all agree that certain thresholds should be met first, both for the safety of the Lao people and also for the wellbeing of visitors. There is a general consensus among travel observers that the following factors will be necessary for a successful reopening: *a high level of vaccination throughout the eligible resident population* (particularly in tourist areas), *lack of a quarantine requirement for fully vaccinated travelers* (as this greatly deters all but the most dedicated tourists), *testing requirement only for tourists displaying symptoms on arrival in Laos for vaccinated travelers* (only proof of a negative test before flying to Laos), and *sufficient health insurance to cover Covid issues*. Tourist visa exemptions for select countries was also on the list of factors.

It is also very important to keep in mind that policies enacted today may not bear fruit for several months. For example, if Laos announces it will reopen tomorrow, it will generate a buzz of interest around the world, but with limited commercial flights available, very few will be able to come. One local travel professional remarked “I think Laos is ready to announce they are open right now, as due to the difficulties of getting here currently we will not find ourselves inundated with tourists, it would take a couple of months. By early 2022, I see no reason why vaccinated, tested tourists cannot come to Laos. Especially when key urban areas (Vientiane and Luang

Prabang) have nearly all of the adult population vaccinated." (R. Hanson, personal communication, 2021).

On the other hand, if a clear reopening is not announced well in advance, both the travel industry and destination marketing efforts will not have time to adequately prepare. The reopening must also be predictable and long-lasting - immune to increasing infection and mortality rates. Thus, it must coincide and run parallel to what the new domestic situation is like. One interviewee said that "tourists want to be able to do what locals do - no sudden lockdowns or unreasonable orders like banning alcohol or gatherings."

Criterion 2 involves conditions within the tourism and health sectors that could influence the risk of exposure to Covid-19. Health and safety protocols and certification (quality seals) will have a greater influence on the perceived image of the destination, company or product (Toubes, Vila, & Brea, 2021). One very prominent example is Singapore's **SG Clean** certification, a public hygiene initiative created to get Singaporean businesses to uphold good hygiene practices in the wake of Covid-19. Launched in February 2020, more than 25,000 individual premises have been certified SG Clean across Singapore, of which more than 1,200 SG Clean quality mark certifications were awarded to tourism premises, including F&B and retail within tourism establishments.

The campaign disseminates information via a dedicated SG Clean website (sgclean.gov.sg) where one can find a list of the certified premises and the official tourism website (visitsingapore.com), and deploys videos through multiple YouTube Channels, like the Singapore Tourism Board (6500+ subscribers) and the official international tourism channel VisitSingapore (140k subscribers), and other Singapore-based channels. Most videos are in English, but some are in Mandarin and subtitled. The campaign is also marketed through the official Facebook Page and its many regional Pages. The Instagram Account and Twitter Account are also active. The campaign also utilizes the hashtags #SafeSingapore and #sgclean frequently.

The Amazing Thailand Safety and Health Administration **(SHA)** is a safety initiative launched by the Tourism Authority of Thailand to prepare for the return of tourism post-Covid-19. Businesses that have obtained the SHA certificate are also licensed to display the World Tourism & Travel Council's Safe Travels stamp. Presently, over 15,000 businesses and entrepreneurs in 10 key sectors across the country have been awarded the Amazing Thailand SHA certificate.

Finally, Laos is launching its own **LaoSafe** standard, an initiative of the Ministry of Information, Culture and Tourism and the Ministry of Health. Accommodation staff, restaurant workers, airline staff, tour guides, and drivers will receive training in the standards developed under the program, so they may be assessed and certified as Safe & Clean LaoSafe.

Criterion 3 is entirely dependent on policies set forth by the governments of the home and destination countries. Countries that do not impose quarantines or other restrictions on vaccinated travelers instantly build marketing buzz, capture the interest of international tourists, and importantly, create tourism revenue and rebuild employment in the sector faster than other countries.

Asia's best example of favorable inbound tourism policies is the Maldives. While most of the continent remains nearly totally closed for tourism, the Maldives reopened to international travelers in July 2020, before vaccines were even available. To visit, travelers must book a hotel from a list of registered facilities and provide a negative PCR test taken within 96 hours of travel (Ministry of Tourism, 2021a). The table below shows tourism arrival figures for the past three years:

Period	**Total Arrivals**	**Percentage of 2019 Figures**
Jan-Sept 2019	1,251,690	-
Jan-Sept 2020	401,714	32.09%
Jan-Sept 2021 (as of 22 Sept)	843,552	67.39%

(Ministry of Tourism, 2021b)

Tourism has not rebounded completely in the Maldives, but the upward trend in arrivals indicates that it is on the mend. Such a recovery would not have been possible without liberal tourism entry policies.

Travel bubbles have been a popular strategy favored by some governments to allow "people additional freedom without causing additional harm" (Block, 2020) Examples include the EU Schengen Area, Singapore's Vaccinated Travel Lane (with Brunei and Germany), and New Zealand's limited travel corridor with several island nations, and vaccine bubbles between some countries in the Middle East and North Africa. Some conditions within the bubbles have ranged from reduced or waived quarantine for vaccinated travelers to recognition of country vaccine certificates.

However, while travel bubbles could be a plausible tourism solution for some countries, it has failed for others. One prime example of a burst travel bubble is that between Australia and New Zealand, which was formally suspended by New Zealand in July, just two months after it began, following a rise in locally acquired cases in both countries. The failure was attributed to a reliance on a zero-covid case policy, which at this point in time, is highly improbable. Evidence suggests that travel bubbles or lanes could make sense if the countries within the bubble share a similar number of cases and respond in the same way.

Another famous example of a limited reopening strategy is Thailand's Phuket Sandbox. To enter the country, travelers must meet the following criteria: have a Certificate of Entry and be a national of approved countries (60+), install and activate the ThailandPlus Alert mobile app, stay in SHA-certified hotels, book and pay for three PCR tests given over the 14 days, be fully vaccinated, have Covid-related health insurance coverage of $100,000, stay in Phuket for 14 days and then can move domestically (TAT News, 2021).

The program has been criticized somewhat in the press for not achieving its ambitious goal of attracting 100,000 tourists to the island between July and September (Chua, 2021). In the first two months of the program, only 26,400 tourists actually arrived on the island. Sudden changes in policy incurred the ire of international visitors (i.e. alcohol ban and new testing requirements from airlines). The top five nationalities of the visitors were American, Israeli, British, German, and French.

As of the writing of this report, Thailand is planning a 4-phase re-opening scheme, whereby a block of provinces would open on the first of every month starting in October, starting with historically touristy provinces like Bangkok and Chiangmai. The country has also recently announced that it would alter its travel policies (no quarantine for vaccinated visitors with a negative Covid-19 result) with low-risk countries such as the UK, the US, Singapore, Germany, China, and other unspecified countries, with more being added to the list every month just as some of these countries have also eased restrictions for their own citizens. India, as Thailand's second-largest tourism market, had also been discussed. One incentive for the Thai government to open up quickly was to try to take advantage of the year-end holidays. However, it remains to be seen how well this strategy will be rolled out given Thailand's reputation for postponing its plans.

The other key factor of Criterion 3 is the propensity for travelers' home countries to allow their nationals to return from a destination country without imposing a quarantine. For example, the United States does not require a mandatory quarantine for vaccinated travelers returning to the country from any destination. Only a Covid test is required prior to flying and another test is recommended 3-5 days after arrival to the US (Centers for Disease Control and Prevention, 2021). Should a positive result occur on return, then the traveler must self-isolate for 10 days at home. Outbound tourism numbers from the US have grown 67% in the first seven months of 2021 compared to the previous seven months as destination countries open up to them (International Trade Administration, 2021).

Period	US Outbound Tourist Numbers
Jun-Dec 2020	14,322,947
Jan-Jul 2021	23,942,288 (+67.16%)

The United Kingdom abandoned its “traffic light” rating system for destination countries in favor of a much simpler alternative, which includes a much smaller list of “red countries”. Travelers to the UK must be vaccinated using an approved vaccine given in certain countries and simply take a Covid test before Day 2 of their arrival in the UK. There is no longer any requirement for a pre-departure Covid test, quarantine on arrival, nor multiple testing after entering the UK from any non-red country (UK Department for Transport, 2021).

For long-haul markets like the US and Europe, high vaccination rates and liberal re-entry procedures for outbound tourists are likely to make them very attractive bubble partners. Apart from their high income status, these developed markets will appear first on the list of areas with which tourist-dependent nations are likely to initiate corona corridors first.

Desperate to kickstart their tourism industries, countries are adapting slowly and relying less on the previously strict demands of their health bureaucracy and paying more attention to their civil and economic counterparts. Political and economic considerations are expected to drive further changes to travel policies as countries waver back and forth from curbing the spread to learning to come to terms with the disease.

Topic 3: Proximity tourism: the ones closest to us will come first.

One of the most likely consequences of this crisis is the bolstering of proximity tourism (Navarro Jurado et al., 2020), understood as traveling near home (Diaz-Soria, 2017; Jeuring & Haartsen, 2017). This prediction is based on the fact that with greater social and environmental awareness (Lew, 2020), post-crisis tourists will probably choose to travel to destinations closer to their place of residence. In the context of growing insecurity, nearby destinations could be considered ‘less risky’ by many potential tourists who, having been noticeably affected by the economic crisis, have seen their purchasing power reduced. Added to this, there are sure to be restrictions on long-haul travel, at least for a while.

In analyzing the 2019 Statistical Report on Tourism and several years preceding, the great bulk of visitors to Laos were regional, and primarily from countries with shared borders. Arrival numbers were growing and relative percentages of visitors did not fluctuate too greatly.

Table 1: Tourist Arrivals and Market Share by Region						
Region	**2017**		**2018**		**2019**	
ASEAN	2,747,096	71.01 %	2,886,844	68.96 %	3,198,829	66.77 %
Asia Pacific	884,875	22.87 %	1,055,415	25.21 %	1,317,478	27.50 %
Europe	161,194	4.17%	165,808	3.96%	182,465	3.81%
Americas	64,227	1.66%	69,101	1.65%	82,652	1.73%
Africa and Middle East	11,446	0.30%	9,264	0.22%	9,641	0.20%
Grand Total	**3,868,838**	**100%**	**4,186,432**	**100%**	**4,791,065**	**100%**

Source: (Tourism Development Department, 2019)

It is important to dig deeper into these numbers to understand what tourists were coming to Laos, and potentially what could happen again in the future. Laos allows visitors from countries with shared borders to enter Laos on a temporary border pass. Border Pass holders are often cross-border traders and are restricted to the province of entry. Passport holders have more mobility to move around the country and are potentially longer-staying and higher-spending tourists.

Table 2: Tourist Arrivals to Laos by Category in 2019				
Country	**Border Pass**	**Passport**	**Total**	**Percent of Total Tourists**
Thailand	830,120	1,330,180	2,160,300	45.09%

Vietnam	30,210	894,665	924,875	19.30%
China	169,883	852,844	1,022,727	21.35%
Cambodia	4,088	24,254	28,342	0.59%
Myanmar	14,781	7,743	22,524	0.47%
Total Regional Tourists	**1,049,082**	**3,109,686**	**4,158,768**	**86.80%**
Korea		203,191	203,191	4.24%
USA		61,184	61,184	1.28%
France		44,416	44,416	0.93%
Japan		41,736	41,736	0.87%
UK		31,976	31,976	0.67%
Germany		25,346	25,346	0.53%
Australia		24,750	24,750	0.52%
Other International Tourists		199,698	199,698	4.17%
Total International Tourists		**632,297**	**632,297**	13.20%
Grand Total			**4,791,065**	**100.00%**

Source: (Tourism Development Department, 2019)

The report also illustrates length of stay and average expenditure per person. These figures are key to understanding which market segments contribute the most in tourism revenue and should receive consideration when formulating marketing plans, targets, and budgets. In the table below, Border Pass holders comprise 21.9% of total arrivals, but only 2.11% of tourism revenue.

Table 3: Percentage Revenue from Tourism by Category, 2019						
Category	**Tourist Arrivals**	**Percent of Total Arrivals**	**Average Length of Stay**	**Average Expenditure per person**	**Total Tourism Revenue**	**Percent of Total Revenue**
Thailand Passport	1,330,180	27.76%	3	$ 156	$ 207,508,080	22.20%
Thailand Border Pass	830,120	17.33%	1	$ 20	$ 16,602,400	1.78%
Vietnam Passport	894,665	18.67%	3	$ 90	$ 80, 519,850	8.61%
Vietnam Border Pass	30,210	0.63%	1	$ 12	$ 362,520	0.04%
China Passport	852,844	17.80%	3	$ 240	$ 204,682,560	21.90%
China Border Pass	169,883	3.55%	1	$ 15	$ 2,548,245	0.27%
Cambodia Passport	24,254	0.51%	3	$ 90	$ 2,1 82,860	0.23%
Cambodia Border Pass	4,088	0.09%	1	$ 12	$ 49,056	0.01%
Myanmar Passport	7,743	0.16%	3	$ 90	$ 696 ,870	0.07%
Myanmar Border Pass	14,781	0.31%	1	$ 12	$ 177,372	0.02%
Total Regional Tourists	**4,158,768**	**86.80%**			**$ 515,329,813**	**55.13%**

Korea	203,191	4.24%	7.93	$ 663.27	$ 134,769,519	14.42%
USA	61,184	1.28%	7.93	$ 663.27	$ 40,581,218	4.34%
France	44,416	0.93%	7.93	$ 663.27	$ 29,459,597	3.15%
Japan	41,736	0.87%	7.93	$ 663.27	$ 27,682,036	2.96%
UK	31,976	0.67%	7.93	$ 663.27	$ 21,208,568	2.27%
Germany	25,346	0.53%	7.93	$ 663.27	$ 16,811,120	1.80%
Australia	24,750	0.52%	7.93	$ 663.27	$ 16,415,814	1.76%
Other International Tourists	199,698	4.17%	7.93	$ 663.27	$ 132,452,724	14.17%
Total International Tourists	**632,297**	**13.20%**	**7.93**	**$ 663.27**	**$ 419,380,596**	**44.87%**
Grand Total	**4,791,065**	**100.00%**	**5.00**	**$ 56.47**	**$ 934,710,409**	**100.00%**

Source: (Tourism Development Department, 2019)

From these statistics, it can be seen that tourists holding Chinese and Thai passports constitute vital regional source markets. Koreans are clearly important to the Lao tourism industry, while the western markets and Japan have a real potential to be larger earners for Laos if the number of arrivals can be grown.

The most influential tourists (in terms of both numbers and spend) have historically been short- and medium-haul Thai, Chinese, Vietnamese, Korean, and then a composite long-haul “Western” group. Deeper insights on tourist behaviors among these five groups were collected and outlined below.

Thailand	Vietnam	China	South Korea
Lower class middle-aged from Northeastern and Central Thai provinces, who travel to Laos via tour buses across the Lao-Thai Friendship Bridges to see main sites, looking for affordable, value-for-money. Very low-level of English. Not very technically proficient or social media savvy (mobile-natives) **Middle class** - (35 and under) who fly from Bangkok to experience another destination close to home (similar culture). Much more social media savvy. **Upper-middle class** Very social media savvy looking for beautiful Instagrammable places. Can be environmentally conscious. Enjoys learning about culture. Prefers areas with modern facilities (4 star hotels).	**Lower class** from border provinces in Northern and Central Vietnam, often migrant labor coming to find work in Laos, or simply crossing through to Thailand **Middle class** from urban areas to do business, visit relations, group touring in central and southern Laos, and visit casinos **Upper-middle class** social media savvy and looking for Instagrammable places. Prefers areas with modern facilities (urban centers, shopping, and 3-4-star hotels)	**Lower middle class** large tour groups that come by plane from cities where there is a direct flight to Laos; often use Chinese-owned businesses. Value for money tourists. Travel via bus groups or internal flights. Very low-level of English. **Middle/Upper-middle class** Pay large sums for food and souvenirs. Often involved in business activities in Laos or visiting family.	**Younger middle class** 18-35: Tourists mostly from urban areas. Social media savvy, Instagram and blogs on Naver.com. Influenced by popular Korean travel TV shows. Enjoys soft adventure activities. Will try local foods, but still prefers to have some Korean meals. Functional level of English. Backpackers and flashpackers on annual one-month trip abroad **Older middle class:** 36-65: Middle class from urban and suburban areas Often not very experienced tourists. Low level of English ability. Travel in budget group tours with tour leaders. Typically visit main highlights, and possibly do some golfing. Prefer mostly Korean meals.

Western (EU, North American, Australia)
Younger middle class 18-30 aged backpackers who frequent VV for affordable fun, carefree partying, socializing with others. Stays in affordable hostels and guesthouses (some Airbnb); likes homestays. Highly adventurous, yet budget conscious. Very social media savvy (mobile and desktop proficient). Looking for places to chill out (VV, 4000 Islands). **Older middle class** 40+ middle-class couples and families. High purchasing power. Very educated and environmentally and culturally respectful. Happy to pay a premium for an exclusive experience. Stays at 4-star hotels and above (VTE, LPB). Likes to travel at their own pace.

With this information, we have developed foreign tourist personas, which do not represent real individuals from any particular tourist market but could represent such a person from any market, *irrespective of nationality*. As identified by the research, the tourist personas are as follows:

Persona Group A: *Middle-income, Young Explorers* (Aged: 20-40)

This group, made up of younger urban people, enjoys traveling solo or with groups of close friends. They often travel on a budget, but can splurge for something really special. Instagrammable sights, foods, and landmarks are extremely important and influence their travel decisions. As such, they also require access to the internet to update social media and keep in touch with loved ones back home. This group enjoys adventurous and cultural activities. They actively browse social media and travel blogs for travel information, as well as online travel magazines. Long weekends are the perfect time for them to travel.

Persona Group B: *Low-middle-income, Budget Traveler* (Aged: 25-45)

Always looking for a bargain, this group enjoys traveling but must manage time and financial constraints. A typical itinerary includes ticking off popular sights. They can travel solo, but will easily travel with friends if it can save costs. Budget accommodation with facilities, like an electric kettle or a microwave, are preferred so they can self-cater some meals. Their education and English language levels are moderate and get travel information from brochures and the country's largest newspapers. The extent of their tech-savviness is limited to popular social media platforms in their home countries.

Persona Group C: *Upper-middle-income, Worldly Sophisticates* (Aged: 40-70)

These travelers enjoy a comfortable lifestyle and are farther along in their career paths. They travel for leisure with children or with their spouses to peaceful or beautiful locations, but sometimes also travel alone for business meetings or conferences. They are sophisticated and well-educated. Gourmet food and cultural experiences are important to them, while they prefer to stay in luxurious hotels with modern facilities. Golf is also a social activity to strengthen business ties and spend time with friends. They get tourism information from high-end publications like Travel+Leisure, Conde Nast Traveler, and Monocle. They are mobile-savvy but desktop-centric.

Persona Group D: *Lower-middle-income, Group Tourist* (Aged: 45-65)

Less adventurous travelers than other persona groups, this type travels in group tours staffed by a tour leader, due to the language barrier. Traveling on a fixed itinerary allows them to tick important sights off a list. They may try local foods sometimes, but are likely to visit establishments that serve foods they are more accustomed to. This group enjoys buying souvenirs to bring home. Travel usually happens on long weekends or holidays. They trust travel companies for advice, but also check native-language websites or social media platforms or seek word-of-mouth recommendations for destinations to visit.

Persona Group E: *Lower-middle-income, Young Nomad* (Aged: 18-30)

Often traveling over a long period of time, this group looks to stretch their budget as long as possible to enable their travels to continue, as much of their travels on their own as possible. They are happy to stay in budget accommodation such as hostels or guesthouses. Their disposable income is low, so they prefer cheap meals and nightlife, but can go on treks or other adventure activities on occasion. They are comfortable taking long bus rides or renting motorbikes to remote and non-touristy areas. They are often keen to do homestays with minimal facilities. They actively browse social media or specific websites for travel information and listen to reviews and tips from other travelers.

As soon as borders reopen, there is a high likelihood that regional travelers will visit Laos in higher proportions than long-haul visitors. These regional visitors also typically spend less per person in-country. Extremely affluent people exist in these regional source markets, so the key will be in appealing to them in order to boost tourism revenues in Laos in the short to medium term to offset the muted long-haul market.

The Lao-China Railway could be an instrumental tool in bringing an influx of Chinese visitors to Laos. The sheer novelty of the train will be a draw in itself and will bring many travelers who may have not considered Laos before. Rob Hanson of Nakarath Travel explains, “It goes without saying the building of the railway will attract more tourists from China but a focus on the high spending sector of this market should be the key – the mass tourists will come anyway.” However, the Lao government has recently announced that the country would not be accepting passengers as had been anticipated by the end of this year.

Each outbound flow of tourists from a source market will be governed by the restrictions proscribed by that country. China is a very large source of travelers that the world is waiting to open up. Due to China’s own strict adherence to a zero-case goal and onerous policies on quarantine for inbound or return travel, dubbed the “14+7+7” quarantine system (14-day centralized hotel quarantine; one-week at-home isolation; one-week health monitoring), Chinese people simply cannot commit to traveling abroad during this time (Chen, 2021).

In conjunction with the MICT, a local tour company has proposed to bring limited numbers of golf tourists from South Korea to Laos in controlled tour groups. According to the proposal, guests would stay one week and visit various golf courses around Vientiane. Under the planned itinerary, guests would stay at Landmark

Mekong Riverside Hotel, with dining confined there and at one Korean restaurant. Flights and vehicles used would not exceed 60% capacity, while guides and drivers would be fully vaccinated. Travelers would also be required to be fully vaccinated, insured, and Covid-tested 72 hours prior to departure. On arrival in Laos, they would be tested, as well as before departure.

This trial program is still in the consultation phase and no timeline is available as to its inauguration (Department of Information, Culture and Tourism of Vientiane Capital, 2021). If this very heavily-controlled sandbox variant comes to fruition, it may be the first opportunity for foreign travelers to visit Laos in nearly two years.

Topic 4: Travel planning and habits have gone increasingly digital

Although promotion will be necessary—for tourism markets to awaken from the lethargy after the initial impact—promotion should not be the same as before. The strategies of tourist destination managers will not only be based on promotion, but also on reconfiguring the offer in the light of the new social reality resulting from the COVID-19 disaster.

A digital transformation of the industry is expected, so that the virtuality of the tourism marketing process is considerably increased. In terms of marketing tools, social networking sites will be essential instruments for recovery in the coming months. Apart from social media and blogs, official government sources and official destination websites and other official communication channels will be among the most consulted platforms.

Electronic Word-of-Mouth (eWOM) is one of the most relied-upon source of information for destination selection (Murphy, Mascardo & Benckendorff, 2007) and during the pandemic, the eWom effect has increased as a source of information and as a way to share opinions. The growing importance of digital media, which seems to outweigh the direct recommendations of friends and relatives, may be due to two main reasons: first, the volume of information is so large that nearby sources do not have the capacity to process and synthesize the information in all its breadth and at the high rate at which it is generated; and second, the weight of health safety-related factors in consumer decision-making has grown enormously.

Finally, tour operators and travel agencies would be next in line in the quest to spark tourist interests in their destination country (Toubes, Vila, & Brea, 2021).

After nearly two years of lockdown and working from home throughout the world, people have grown increasingly technologically adept and social media savvy, as evidenced in the growth of such platforms like Zoom, Tiktok (O'Halloran, 2020) and Netflix. Internet users keep daily tabs on the Covid situation and other important information from around the world, while also managing their work and home lives online.

Differing preferences and online ecosystems have given rise to various social media platforms being favored in countries throughout the region. The following table gives insights as to which platforms are most in use by main source markets for tourists to Laos.

Table 4: Percentage of Internet Users That Used Each Platform in the Past Year

	Total Population	Total Social Media Users	#1 Platform	#2 Platform	#3 Platform	#4 Platform
Thailand	69,880,000	55,000,000	YouTube 94.2%	Facebook 93.3%	Line 86.2%	Facebook Messenger 77.1%
Vietnam	97,750,000	72,000,000	YouTube 92.0%	Facebook 91.7%	Zalo 76.5%	Facebook Messenger 75.8%
China	1,440,000,000	930,800,000	Weixin 73.2%	Sina Weibo 47.1%	Kuaishou 45.1%	Douyin 41.1%
Korea	51,290,000	45,790,000	YouTube 85.9%	Kakaotalk 80.1%	Instagram 57.5%	Facebook 55.4%
USA	332,000,000	240,000,000	YouTube 81.9%	Facebook 73.4%	Instagram 56.6%	Facebook Messenger 55.7%

Source: (Hootsuite, 2021)

Consistent with the abovementioned polls, the National Tourism Marketing Strategy also encourages the utilization of key social media, in conjunction with online review sites and online travel agents, such as Agoda and Booking.com. TripAdvisor is still a dominant player as a resource for information for travelers, with 18% of the travel market looking to this site for guidance. The Strategy also reiterates the importance of having comprehensive information listed, so that prospective travelers can find the information they need to choose Laos (Ministry of Information, Culture and Tourism, 2019).

Regional expert Gary Bowerman believes that online channels to reach Laos' tourism markets will not have changed a great deal during the pandemic, but engagement strategies will need to be more nuanced and creative, "certainly, short video and live streaming will likely be saturating the same channels with their promotions, so making campaigns more interactive, participative, and gamified may be the best way to inspire travelers." (2021).

Key messages will also need to be reworked and fine tuned to target travelers who may visit Laos in the next few years. Bowerman also emphasizes that it is important to continually study niche segments within Laos' top source markets and devise separate strategies. He continues, "No 'one size fits all' marketing. Those days are gone. And don't assume that what worked in 2019 will succeed in 2022" (2021).

Lastly, contract tracing apps (CTAs) offer a way for both governments and tourists to introduce an element of safety and confidence into the tourism process. As of January 2021, a total of 49 CTAs are known to be used in 48 different countries (O'Neil, Ryan-Mosley, & Johnson, 2020). Some examples include Australia's COVIDSafe, Austria's Stopp Corona, Canada's COVID Alert, Singapore's TraceTogether, Malaysia's MyTrace, Thailand's Mor Chana, Philippines StaySafe, Vietnam's BlueZone, China's "health code" system, Germany's "Corona-Warn-App," and Google and Apple's local apps in conjunction with several US state and local governments.

It is commonly accepted that CTAs remain a decisive factor in fighting the pandemic, but their efficacy depends heavily on people's acceptance. In one study, the authors find that strong predictors of CTA acceptance are the perceived effectiveness of these apps, previous experience with CTAs and use of other health apps, concerns about privacy, and levels of trust in the state (Kostka & Habich-Sobiegalla, 2020).

LIMITATIONS

The novelty of the current situation and the uncertainty about the behaviour of the industry and consumers is a limitation. As the pandemic is currently at its peak (at the time of writing Laos is coping with its third wave), future research should continue to analyze the situation according to the evolution of the crisis, confirming or correcting the trends detected and establishing new scenarios for the tourism sector.

In future research, data could be collected using quantitative techniques such as tourist questionnaires, thus complementing expert opinion and strengthening conceptual frameworks with the opinion of tourism consumers.

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