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Tourism and Hospitality Enterprise Survey of Employment and Skills in Lao PDR, 2021:

Research Findings and Employment Projections, 2021-2026

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Foreword

Before the onset of the COVID-19 pandemic, tourism was growing rapidly in Lao PDR. In 2019, international tourist arrivals increased by 14.4%, reaching an all-time high of 4.79 million, with international tourism receipts of $934 million. The downturn in tourism from early 2020 caused by the COVID-19 pandemic has resulted in the closure of many tourism businesses in Lao PDR with heavy job losses reported.

The 2021 Tourism and Hospitality Enterprise Employment and Skills Survey was conducted during May and June 2021 to measure change in the sector since the last survey was conducted in 2018. Furthermore, the report assesses the impact of COVID-19 on employment and the longer-term viability of tourism enterprises. This survey is the most comprehensive of its type to be conducted in tourism and hospitality and provides a representative picture of the sector across 17 provinces and Vientiane Capital.

Historically, tourism has shown a strong capacity to recover from adversity returning to being a source of revenue for public and private stakeholders, and an important source of job creation. With the expectation that tourists will resume travelling to Laos, it is essential to ensure the preparedness of the workforce with updated skillsets, such as appropriate health and hygiene skills, for when international travel restrictions ease.

An increased investment in training, together with ongoing collaboration between training providers, employers and government, will ensure further improvement in the alignment of supply and demand for skilled workers in the tourism and hospitality sector, improving international competitiveness and the ability to attract more visitors.

This report has been produced through close collaboration of the Government of the Lao PDR and the Skills for Tourism Project (LAO/029). It is our intention that the findings of this survey will contribute to interventions and efforts aimed at supporting the recovery of the tourism sector in Lao PDR. We look forward to continued partnership and collaboration toward sustainable and inclusive growth and poverty reduction.

Nouphanh Outsa
Director General
Technical Vocational Education Department
Ministry of Education and Sports

Selected Acronyms and Abbreviations

ADB	Asian Development Bank
ASEAN	Association of South East Asian Nations
CAG	Compound Average Growth
DICT	Department of Information, Culture and Tourism
EDC	Enterprise and Development Consultants Co., Ltd.
EMIS	Education Management Information System
ESS	Tourism and Hospitality Enterprise Survey of Employment and Skills in Lao PDR
GDP	Gross Domestic Product
HR	Human Resources
ILO	International Labour Organization
ISCO	International Standard Classification of Occupations
ISIC	International Standard Industry Classification
IVET	Integrated Vocational Education and Training
Lao PDR	Lao People's Democratic Republic
MICT	Ministry of Information, Culture and Tourism
MoES	Ministry of Education and Sports
MoLSW	Ministry of Labour and Social Welfare
MRA	(ASEAN) Mutual Recognition Arrangement
NEC	Not Elsewhere Classified
PPE	Personal Protective Equipment
SD	Skills Development
SDC	Skills Development Centers
T/H	Tourism and Hospitality Sector (Industry)
TCO	Tourism Characteristic Occupations
TVET	Technical Vocational Education and Training
WB	World Bank

Glossary

This glossary provides operational definitions of key terms used in this report:

Business longevity	Business longevity relates to the existence of an establishment since commencement of its operations. Tourism establishments in this study are categorised as 'start-up' (in operation for two years or less), 'new (three to eight years), 'established' (nine to 20 years), and 'long term' (21 years or longer).
Constant prices	Constant prices (also referred to as 'real') are used to measure the true growth of a series, i.e. adjusting for the effects of price inflation. Usually expressed in terms of a base year (e.g., 2012 prices are the base year for GDP and visitor expenditure cited in this report).
Current prices	Also referred to as 'nominal' prices. Current prices make no adjustment for inflation.
Disadvantaged	Disadvantaged workers were defined, for this study, as meeting one (or more) of the following criteria: • poor/from a poor family background/from a poor household; • living in a rural and/or remote area; • did not complete basic education; • from an ethnic minority; • other (e.g. orphaned, abandoned, a survivor of human trafficking, sexual crime or violence, living with a disability or chronic illness, or recovering from addiction).
Employed in temporarily closed business	Staff not actively engaged in any productive capacity, nor being adequately remunerated. Such workers could be considered as 'stood down', 'furloughed' or 'marginally attached' since they do not meet the activity test requirements to be classified as employed according to International Labor Organization (ILO) definitions.
Enterprise	Any business, company, organisation, or firm which may operate at one or multiple business locations.
Establishment	A single business location of an organisation with people working at it (also referred to as workplace, business, firm, and employer).
Firm size	Firm size relates to the number of employees in an establishment. Tourism establishments in this study are categorised as 'micro-businesses' (employing fewer than six workers), 'small' (employing six to 20 persons), 'medium' (21 to 100 staff), 'large' (101 to 200 staff), and 'very large' (over 200 staff).
Handicrafts	Handicrafts is a subsector included in this study comprising businesses engaged primarily in the production and distribution of locally made handicraft goods and souvenirs popular with the tourist market. The subsector includes small own account businesses and retail outlets (employing three or more staff) through to large handicraft cooperatives and factories.
Hard-to-fill vacancies	Vacancies which are proving difficult to fill, whether this be the result of poor supply (e.g., insufficient qualified or experienced candidates) or demand reasons (e.g., uncompetitive wages).

In-scope	Refers to sampled businesses to be included in the survey. To be in-scope for this study a firm needed to employ three or more persons in the hotel, resort, restaurant, and entertainment subsectors, or three or more persons in the guesthouse, travel services, attraction, and handicraft subsectors.
Labour demand	Total employment plus unfilled vacancies.
Labour supply	Total employment plus unemployment.
Net replacement rate	The number of jobs arising from individuals leaving an occupation net of jobs taken by persons re-entering the occupation, expressed as a percentage of total employment in that occupation.
Occupations	Definitions of occupations used in this report are derived from the International Standard Classification of Occupations (ISCO).
Out-of-scope	Refers to firms omitted from the survey because they were either found not to be tourism related businesses or they employed too few persons.
Real gross domestic product	The total value of output, adjusted for inflation, produced within the geographical boundaries of the country regardless of the nationality of the entities producing the output.
Real per capita GDP	An approximation of the value of goods produced per person in the country, equal to the country's constant GDP divided by the total number of people in the country.
Region	Four geographic regions used in this report are amalgamations of provinces: 'North' includes Bokeo, Houaphan, Luang Namtha, Luang Prabang, Oudomxay, Phongsaly, Xayabouly, and Xiengkhuang. 'Central' includes Bolikhamxay, Khammouane, Savannakhet, Vientiane Province, and Xaysomboun. 'South' includes Attapeu, Champasak, Saravan, and Sekong. Vientiane Capital comprises the fourth region.
Skills deepening	An increase in the level of knowledge and skills required to perform a task or job role due to advances in technology and related factors which impact the complexity of the role.
Skills gaps	A "skills gap" is where an employee is not fully proficient, i.e., is not able to do their job to the required level.
Skill level	An indicator of both the complexity of tasks to be performed and the qualifications and knowledge required for competent performance in a defined occupation.
Staff turnover rate	The number of job leavers over the past year expressed as a percentage of year-average total employment.

Subsector	Tourism subsectors defined in this report are: Hotels, Resorts and Guesthouses (Accommodation); Restaurants; Entertainment; Travel Services; Attractions; and Handicrafts.
Tourism characteristic occupations	Occupations in which most workers will be employed by tourism establishments.
Vacancy rate	The number of current vacancies expressed as a percentage of total employment.

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Executive Summary

This report presents key findings from the second Tourism and Hospitality (T/H) Enterprise Survey of Employment and Skills in Lao PDR (ESS) undertaken as part of the Skills for Tourism Project (LAO/029)[1]. The ESS provides a representative picture of the sector across 17 provinces and Vientiane Capital. The scope of the survey covered all registered establishments, employing three or more persons, in the hotel, resort, guesthouse, restaurant, entertainment, travel services, attractions, and handicrafts subsectors. Temporarily closed establishments were also considered in-scope for the survey. Many businesses were found to have permanently closed during the survey fieldwork, consequently the estimated total number of in-scope T/H establishments was revised down from 5,300 to 4,854. A total of 1,323 establishments responded to the survey. The high consent (96.4%) and response rates (66.5%) achieved ensure a high degree of reliance can be placed on the survey findings.

The survey was conducted in the wake of the global coronavirus pandemic (COVID-19), which saw economic growth in Lao PDR contract in 2020 by 0.5% – marking its first negative economic growth since 1986. The services sector has been hit hardest due to lockdown measures and the decline in travel and tourism, while remittances, a vital source of income for many families, have dried up. Economic growth is forecast to rebound to 4.0% in 2021, suggesting a slow recovery, as the pandemic outbreak is expected to subside slowly.

The ESS findings confirm the devastating effects of COVID-19 on the T/H sector employment in Lao PDR. After peaking at an estimated 59,000 persons employed in January 2020 – following an all-time high number of international visitor arrivals in 2019 – employment fell to just 8,200 persons in T/H establishments who continued to operate in April 2020 following the COVID-19 lockdown and travel bans. Some 27,400 persons remained marginally attached / 'employed' in temporarily closed establishments.

Total employment in T/H currently stands at 28,400 persons in businesses open and trading (a further, 12,200 were reported as marginally attached / 'employed in temporarily closed businesses'). The 95% confidence interval puts this estimate in a range from 24,400 to 32,400 persons employed. This represents **a contraction of 51.9%** since the high recorded in January 2020. Almost one-third of all T/H enterprises were temporarily closed at the time of the survey in May and June 2021. On average, T/H establishments employ 8.4 staff (including those fully employed and marginally attached), compared to 15 staff in 2018, reflecting the downsizing associated with the COVID-19 contraction.

T/H businesses with a stronger dependency on international tourists as a share of their customer base, **have been hit hardest** by the COVID-19 pandemic and are more likely to be temporarily closed. Over half (56%) of staff employed in temporarily closed businesses are in the North region which includes Luang Prabang – the preferred holiday destination for most international tourists.

1 LAO/029 supports improvements in T/H technical and vocational education and training (TVET) and skills development (SD) provision in Lao PDR through enhanced quality, financing and governance. A particular emphasis of LAO/029 is to support disadvantaged youth from poor families to acquire the skills needed to work in hotels, restaurants and the greater tourism economy. LAO/029 receives financial support from the Governments of Lao PDR, the Grand Duchy of Luxembourg and Switzerland.

Many T/H workers are at risk of falling into poverty. In all cases of temporary closure, firms report that they continue to employ many of their staff during these periods, often rostered on a part-time basis to undertake cleaning or maintenance. However, as these workers are not actively engaged in any productive capacity, nor being adequately remunerated, their situation is precarious, leaving many at risk of falling into poverty. More than half of all reported employment in resorts, entertainment, and attractions was in temporarily closed businesses.

Business turnover contracted even further than employment, with business revenues falling **by an average 64.6% in 2020 compared to 2019,** highlighting the precarious nature of employment with revenues insufficient to pay salaries and wages.

To mitigate the impacts of COVID-19 on business operations, **employers have responded by cutting staff numbers (62%), wages (36%), and/or reduced trading hours (37%).** In response to ongoing public safety concerns, over 94% of T/H operators have implemented a range of safety measures, including wearing of masks and personal protective equipment (PPE) by staff (86%), installing sanitisers (82%) and social distancing (76%). The main reason for not implementing safety measures was that the business was temporarily closed.

Business confidence is low and given the uncertainty surrounding the duration of the global recession and prolonged travel bans, **three-in-five T/H operators are unsure about the ongoing viability of their business.** Around one-in-five businesses expect to return to their pre-pandemic capacity in the next 12 months while only 6% of businesses expected to expand their operations. Just under 2% have assessed their business operation as 'not viable' and plan to close permanently within 3 to 6 months.

Due to the downturn in tourism activity, there is considerable excess capacity in the market with almost 80% of all T/H businesses currently operating below 50% capacity in year-average terms. **Occupancy rates for accommodation establishments, have halved** (from 54% in 2019) to just 28% in 2020. Across all sectors, capacity utilisation has deteriorated considerably since the 2018 ESS with the proportion of **businesses assessed as either 'at risk' or 'unsustainable' increasing from 17% to 54%.**

Low vacancy rates and limited planned recruitment activity further demonstrate the depressed state of the T/H sector in Lao PDR and a general lack of business confidence over the near-term. Only 8% of businesses have current vacancies on their books, and only one-in-ten has plans to recruit new staff over the next 12 months. Hard-to-fill jobs are not widespread. Of 63 firms who reported hard-to-fill vacancies only 11 adopted more formal recruitment approaches such as newspaper advertising or registering the vacancy with a recruitment agency. Most firms citing hard-to-fill vacancies continue to rely on informal methods such as word-of-mouth or walk-in job applicants to fill their vacancies. At the current levels of staff turnover and planned recruitment, **it could take over five years for the total T/H employment to return to pre-COVID-19 levels.**

Notwithstanding the current turmoil and disruption to T/H services caused by the global pandemic, **the T/H sector in Lao PDR has undergone significant skill deepening** since the first ESS in 2018.

Encouraging trends in T/H graduate supply data demonstrate significantly improved alignment between T/H training providers and the labour demands of employers in the industry. Consequently, the industry has recorded **a 20%-point increase in the qualification profile,** with 51% of employed workers holding formal qualifications (up from 30% in 2018). Of these, 6.7% hold T/H related qualifications (compared to just 3.1% in 2018). **The illiteracy rate has fallen by 7% points** from 49.3% to 42% over the same period.

Despite the severe contraction caused by the global pandemic tourism is seen as one of the sectors with significant long-term potential to create income for people from disadvantaged backgrounds in Lao PDR. New sets of skills, such as infection prevention and control, as well as health and safety practices, will be required to safely operate in the post COVID-19 workplace.

Projections of T/H employment demand to 2026 in this report have been modelled under a range of scenarios reflecting the underlying uncertainty going forward. The most likely scenario incorporates the impact of the current economic contraction and consensus forecasts of future economic growth. Under this scenario aggregate **T/H employment is forecast to rebound to pre-COVID levels of 57,000 by 2023 – during which time many displaced workers could be re-employed – reaching 67,600 persons by 2026.** Implicit in this forecast is a return to 'normal' international travel levels within the timeframe of 2021-22 with the growth trajectory moderating from 2023. To achieve this, a concerted and effective effort will be required to ensure a sustained rate of recovery in visitor arrivals and spending across the economy.

With ongoing uncertainty surrounding global travel, as precautionary behaviour and travel continue to negatively affect international tourism related services and transportation, **promoting and developing domestic tourism could be a key component of the T/H sector medium term recovery strategy for Lao PDR.**

Increased investment in vocational training, together with ongoing collaboration between training providers, employers and government, will ensure further improvement in the alignment of supply and demand for skilled T/H workers in Lao PDR, underpinning international competitiveness and an ability to attract a more lucrative visitor portfolio.

1 Introduction

1.1 Context

The Lao People's Democratic Republic (Lao PDR) remains one of the 48 nations on the United Nations' list of least developed countries. About 7.3 million people live in its 17 provinces and capital city. Most people are still living in rural areas, although urbanisation is occurring at a rate of approximately 5% per year, primarily to Vientiane Capital. The population is relatively young with 58% under the age of 25. Having one of the youngest populations in the region, Lao PDR is projected to benefit from a 'demographic dividend' to the economy in the medium-term, but only if young women and men are better equipped with appropriate skills and knowledge, and job creation keeps pace with the growth of the working-age population.

Despite the severe contraction caused by the global coronavirus pandemic (COVID-19), tourism is seen as one of the sectors with significant long-term potential to create income for people from disadvantaged backgrounds in Lao PDR. The main income from tourism (with pro-poor potential) is generated in hotels and restaurants (through salaries paid to employees and sale of agricultural products for meals), as well as the sale of handicrafts and community-based services (such as guiding and homestays). However, at present, people from disadvantaged backgrounds profit only marginally from tourism. There is potential to increase their share of tourism-related income, directly through greater participation in the tourism labour force, and indirectly through participation in tourism-related supply chains such as handicrafts. The challenge is to provide them with the skills and knowledge to move up the value chain by providing higher quality services and goods, resulting in higher economic yields that make a greater contribution to poverty alleviation.

In 2018 the Skills for Tourism Project (LAO/029)[2], supported the conduct of the first Tourism and Hospitality (T/H) Enterprise Employment and Skills Survey (ESS) in 17 provinces and Vientiane Capital in Lao PDR. The survey identified the specific and evolving human resource needs of the T/H industry in Lao PDR. The findings of the survey informed T/H skills development helping training providers to match capacity to demand and supporting their efforts to develop a market-oriented offer.

2 LAO/029 (hereinafter refered to as the Project) supports improvements in T/H technical and vocational education and training (TVET) and skills development (SD) provision in Lao PDR through enhanced quality, financing and governance. A particular emphasis of LAO/029 is to support disadvantaged youth from poor families to acquire the skills needed to work in hotels, restaurants and the greater tourism economy. LAO/029 receives financial support from the Governments of Lao PDR, the Grand Duchy of Luxembourg and Switzerland.

The 2020 downturn in tourism caused by the COVID-19 pandemic has resulted in closure of many tourism businesses in Lao PDR with job losses reported. It is anticipated that once international travel restrictions ease, most tourism businesses plan to re-open. When this happens the demand for additional and appropriately skilled staff will increase. New sets of skills, such as infection prevention and control, as well as health and safety practices, will be required to safely operate in the post COVID-19 workplace.

The second ESS for Lao PDR was conducted during May and June 2021 as a re-run of the 2018 ESS, to provide directly comparable results to measure change – growth/decline – in employment in the sector over the past three years. Additional questions have been incorporated to assess the impact of COVID-19 on employment and the longer-term viability of tourism enterprises.

1.2 Objectives

This survey is the most comprehensive of its type to be conducted in the T/H sector and provides a representative picture of the sector across 17 provinces and Vientiane Capital. The specific objectives of the survey were to:

- Ascertain the size of the labour market in each T/H subsector by occupation, location, and skill level,
- Assess the impact of COVID-19 on employment and T/H skills development,
- Quantify the number of vacancies and recruitment issues, and
- Identify priority occupations and skills challenges.

The survey data gathered will be used, in conjunction with training supply data and other data sources, to develop a quantitative model of labour demand and skills requirement in the T/H sector in Lao PDR. The findings will inform an assessment of the projected skills needs for the T/H sector in Lao PDR from 2022 – 2026.

The findings of this report will further inform relevant stakeholders of T/H Technical Vocational Education and Training (TVET) and skills development (SD) in terms of policy, planning, provision and evaluation.

1.3 Structure of this report

A brief economic outlook, for the Lao PDR economy in general and prospects for the tourism sector more specifically, is presented in section 2. Section 3 outlines the survey methodology including sample selection and stratification for the ESS. The results of the analysis are presented in section 4, focusing primarily on the implications at national and sectoral level. Section 5 presents additional sectoral snapshots as an aid to focus skill needs and training development at the subsector level. The growth prospects for the T/H sector are considered in section 6. The final section concludes with recommendations to support recovery following the COVID-19 contraction and sustainable and inclusive growth as the sector transitions to a higher-skilled workforce and improved international competitiveness.

2 Economic Outlook

While Lao PDR has made good development progress over the past twenty years, halving poverty, reducing malnutrition, and improving education and health outcomes, the effects of COVID-19 on the Lao economy are placing at risk some of the significant gains made.

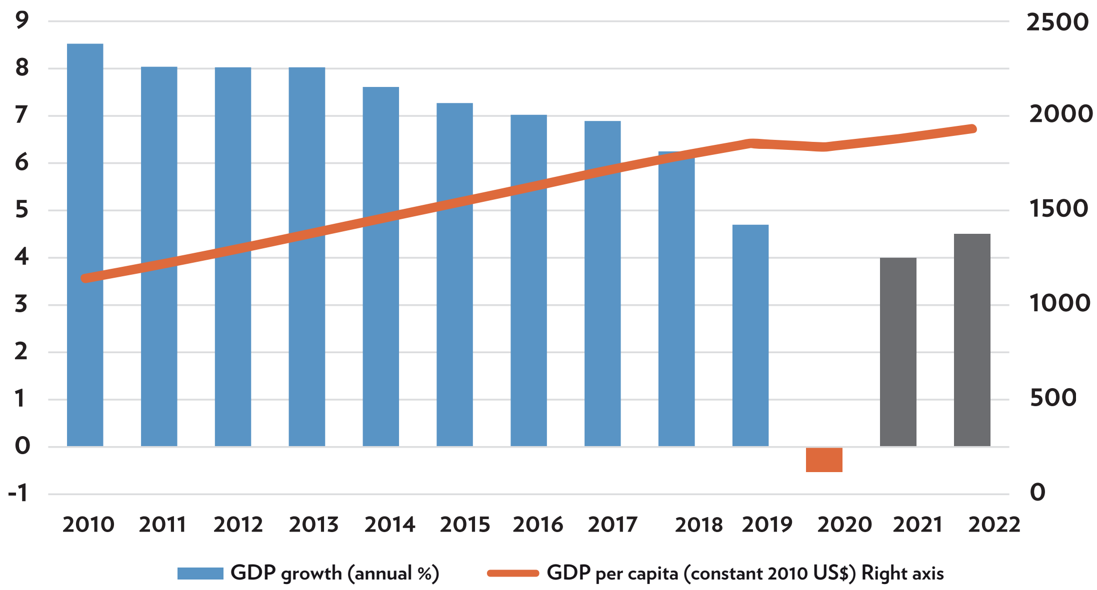
In the wake of the COVID-19 pandemic, economic growth of the Lao PDR contracted in 2020 for the first time in three decades. The Asian Development Bank's (ADB) latest Asian Development Outlook (ADO) 2020 Update[3] estimated the Lao economy contracted by 0.5% in 2020 — marking its first negative economic growth since 1986 (see figure 1).

The service sector has been hardest hit, due to lockdown measures and the decline in travel and tourism, while remittances, a vital source of income for many families, have dried up. The unemployment rate has risen to over 23%, from 16% at the end of 2019. Supply chain disruptions have negatively affected industry, especially manufacturing, while the agriculture sector has stayed resilient due to a healthy harvest.

The inflation rate increased to 5.5% in 2020, due to higher food prices and Lao Kip depreciation. In the first half of 2020, the Kip exchange rate depreciated by 1.6% against the US dollar. Inflation for 2021 is projected to ease to 4.5%, as food prices are expected to decline due to a better harvest.

The COVID-19 outbreak has also hampered the government's prospect to collect revenues, widening the fiscal deficit and exacerbating public debt servicing pressure. Public external debt has increased to 65% of GDP in 2020 from 59% in 2019. Laos has onerous debt service obligations, which stand at around US$1.1 billion per year for 2020-23 according to World Bank (WB)[4] estimates.

Figure 1: GDP and GDP per capita growth, 2010 to 2022



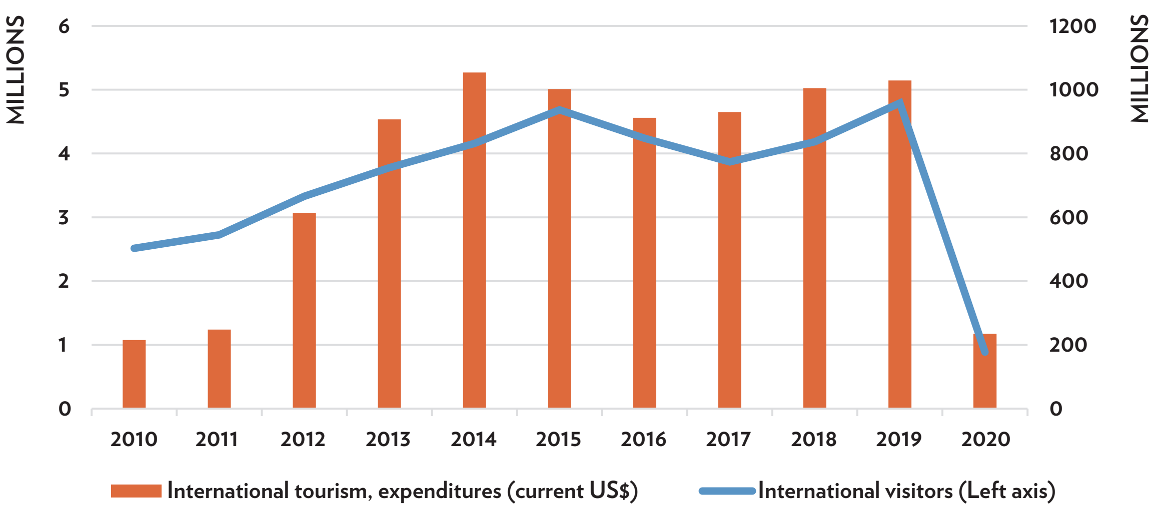
Source: World Bank and ADB[5]

3 ADB. Asian Development Outlook (ADO), 2020 Update. April, 2021.
4 World Bank. Lao PDR Economic Monitor, January 2021.
5 Source: World Bank Open Data; https://data.worldbank.org/country/lao-pdr last accessed 20 July 2021.

Economic growth is forecast to rebound to 4.0% in 2021,[6] suggesting a slow recovery, as the pandemic outbreak is expected to subside slowly. Risks to the outlook, however, are mainly on the downside and include a prolonged COVID-19 outbreak, delays in rolling out the vaccines, a more sluggish recovery in Lao PDR's key trading partners, heightened difficulties in meeting external public debt-service obligations, and potential adverse weather-related events. Rising food prices and job uncertainty for the poor and vulnerable are also major risks.

Prior to the onset of the COVID-19 pandemic, tourism was growing strongly in Lao PDR. Ministry of Information, Culture and Tourism (MICT) data[7] show international tourist arrivals reached an all-time high of 4.8 million in 2019 with tourist expenditures exceeding $1 billion USD. Following the first reported COVID-19 cases in March 2020 and the subsequent closure of all international ports of entry to tourists, visitor arrivals plummeted by 81% to just 886,000 visitors in 2020 and expenditures falling by a commensurate margin to just $234 million (figure 2).

Figure 2: International visitors[8] and expenditure: 2010 to 2020



Source: MICT and World Bank

An initial ADB assessment of the impact of COVID-19 on tourism enterprises in Lao PDR confirmed that more than half of all tourism establishments were temporarily closed in May 2020.[9] The negative impact was larger for enterprises most reliant on international guests compared to those with a greater reliance on domestic tourists.

As GDP per capita continues to rise in Lao PDR (see figure 1) reflecting higher levels of discretionary income, local residents have developed a growing affinity for travel and tourism. In 2019, there were 2.4 million domestic tourists and 1.1 million outbound travel trips[10] among a population of seven million. With a forecast slow economic recovery and ongoing uncertainty surrounding global travel, as precautionary behaviour and travel continue to negatively affect international tourism-related services and transportation, promoting domestic tourism could be a key component of the T/H sector recovery plan for Lao PDR.

6 ADB. Asian Development Outlook (ADO), 2020 Update. April, 2021.
7 Government of Lao PDR, MICT. Statistical Report on Tourism in Laos, 2020. Vientiane.
8 Includes visitors who stayed at least one night. World Bank source international visitor data from MICT but exclude 'Border Pass Day Trippers' to ensure data are internationally comparable.
9 ADB. The Impact of COVID-19 on Tourism Enterprises in the Lao People's Democratic Republic: An Initial Assessment.ADB Briefs. No. 141. June 2020.
10 Excludes official, business, and other passport holders, and excludes all border pass trips.

3 Survey Methodology

A total sample of 1,323 responding T/H enterprises operating across 17 provinces plus Vientiane Capital made up the survey. Of the total responses, 430 firms also responded to the 2018 ESS, providing a longitudinal subset of directly matched results.

The survey was conducted by face-to-face and telephone interviews with data captured electronically using tablets. The fieldwork, undertaken by Enterprise and Development Consultants Co., Ltd. (EDC), took place between 24 May and 30 June 2021, across all 17 provinces and Vientiane Capital. Follow-up interviews and data validation were completed by 20 July 2021.

Enumerator and supervisor training was conducted over five days in Vientiane in March 2021 and included the involvement of staff from MICT and the Ministry of Labour and Social Welfare (MoSLW) to be trained as enumerators as part of a capacity development initiative for the Project partners. The initial survey schedule was disrupted due to a secondary outbreak of COVID-19 in late April 2021 necessitating a suspension of travel of the survey field teams from province to province. Consequently, online training was conducted for a further two weeks (from 10 to 21 May 2021) recruiting additional local enumerators from each province including staff from the provincial offices of the Department of Information, Culture and Tourism (DICT). In total, a team of 80 enumerators (including 46 women) were recruited for the duration of the survey.

3.1 Scope of the survey

The scope of the survey covered all registered establishments employing three or more persons, in each subsector whose business operations offer services to tourists (either international or domestic).

It should be noted that the employment threshold for hotels, resorts, and restaurants in the 2018 ESS was six or more persons. This change in scope was deemed necessary to ensure that firms who have temporarily scaled down due to the impact of COVID-19 would still be captured in the survey results. Similarly, temporarily closed establishments – who would meet the selection criteria under normal operating circumstances – were also considered in-scope for this survey.

3.2 Survey frame

The primary source of information used to determine the total population of each subsector, and the in-scope component within each from which the sample would be drawn, was the MICT Department of Tourism Promotion's central database containing lists of registered tourism businesses across all provinces by subsector.

This database contains reasonably comprehensive information, such as the number of employees, number of rooms, investment capital, etc., and was used to categorise (out-of-scope) micro-businesses where possible. Information was available to varying degrees across the subsectors, providing full coverage for hotels, resorts, guesthouses, restaurants and partial information on entertainment and travel services. From the list of attractions, it was possible to identify, and exclude, natural attractions which do not employ staff. Natural attractions were only considered in-scope where the MICT database indicated the site also had a gift shop and/or a restaurant/cafeteria attached. The handicraft sector sample frame was compiled from three official lists identifying handicrafts groups and cooperatives, handicraft factories, and family-based handicraft factories.

Overall, the quality of the sample frame has increased considerably since the 2018 ESS (at which time no central list of attractions and handicraft businesses were available). There are, however, considerable time lags associated with business registrations received in provincial offices and the updating of the central database in MICT. Consequently, the frame was supplemented with additional business names from the DICT where available during the fieldwork phase of the survey.

3.3 Sample design and selection

The sample size for each sub-sector was calculated to achieve a 7.5% accuracy rate at the 95% confidence level for the required geographic level of analysis. For hotels and resorts, geography has been set at the provincial level, while the sample size for handicrafts was determined to provide national level results only. For the remaining sub-sectors, sample size was based on four regions: North, Central, South and Vientiane Capital.

Table 1 shows the population and sample frame for each subsector, as well as the selected sample size and the achieved responding sample. Selections were made using systematic simple random sampling from each subsector. Sampling was with replacement for non-response and out-of-scope businesses to ensure the required sample was achieved. For logistical reasons, replacement business units were selected based on a 'nearest neighbour' strategy, i.e., selecting the next listed business from the sample frame in closest proximity to the non-responding or out-of-scope unit.

As can be seen from table 1, the total population of T/H establishments was 7,834. Of these, 5,269 were in-scope. The required sample of 1,317 was slightly exceeded with 1,323 completed interviews.

Table 1: Sample allocation

Sector	Sector population	In-scope sample frame	Required sample	Achieved sample
Hotel	671	641	383	388
Resort	130	123	108	78
Guesthouse	2,223	1,496	354	374
Restaurant	1,519	1,165	109	112
Entertainment	198	170	70	71
Travel services	575	519	98	103
Attraction	2,120	774	104	91
Handicrafts	398	381	91	106
Total	**7,834**	**5,269**	**1,317**	**1,323**

3.4 Response and consent rates

Both the consent rates and the response rates for the ESS were high despite the challenges associated with locating respondents in temporarily closed establishments.

The estimated consent rate for the survey was 96.4%. This rate can be considered in terms of the willingness (consent) of someone to participate in the survey. It provides a measure of both the interviewer's skills and how well the survey questionnaire was designed. The consent rate is derived as the number of interviews that can be used in the analysis, as a percentage of the number of eligible firms actually contacted.

The response rate is the number of interviews that can be used in the analysis as a percentage of all possible interviews that could have been achieved, had every in-scope firm selected in the sample responded. The overall response rate achieved for the survey was 66.5%. The consent and response rates for each subsector are presented in table 2:

Table 2: Consent and response rates

Sector	Consent rate	Response rate	Sample replacement rate
Hotel	95.8%	76.7%	37.9%
Resort	94.0%	54.2%	34.3%
Guesthouse	94.7%	65.3%	66.9%
Restaurant	97.4%	59.7%	82.1%
Entertainment	98.6%	60.2%	71.0%
Travel services	98.1%	59.2%	84.7%
Attraction	100.0%	70.0%	84.6%
Handicrafts	99.1%	67.5%	80.2%
Total	**96.4%**	**66.5%**	**60.9%**

The lower overall response rate for this survey (66.5%) compared to the 2018 ESS (80.1%) is predominantly due to the high number of permanent business closures following the COVID-19 pandemic and the higher proportion of non-contacts (mostly associated with temporary closures). This high proportion of non-contacts and closed businesses required a much larger replacement sample to achieve the required number of completed responses. The sample replacement rate (60.9%) was almost twice that of the 2018 ESS (33.4%).

3.5 Post-enumeration procedures

At the completion of the survey fieldwork population weights were calculated for each responding firm based on their probability of selection in the sample. This weight indicates the number of similar business units in the population that the sampled unit represents. The weights are used to calculate estimates of population characteristics from the information gathered in the sample. Further detail on the weighting procedure applied can be found in the associated technical report.[11]

The final weights were determined after adjusting the subsector population sizes for the estimated number of closed businesses, the removal of duplicate records identified, and net of additional business registrations, as advised by the provincial offices, not listed in the original frame.

The proportion of business closures in the sample was weighted up by the probability of sample selection to provide a revised estimate of the total number of business closures in each sector. The revised population and sample frame sizes are shown in table 3. Annex A provides details on the revised in-scope businesses at the provincial level, together with the final population weights.

11 Tourism and Hospitality Enterprise Survey of Employment and Skills in Lao PDR, 2021, Technical Report. Ministry of Education and Sports, September 2021.

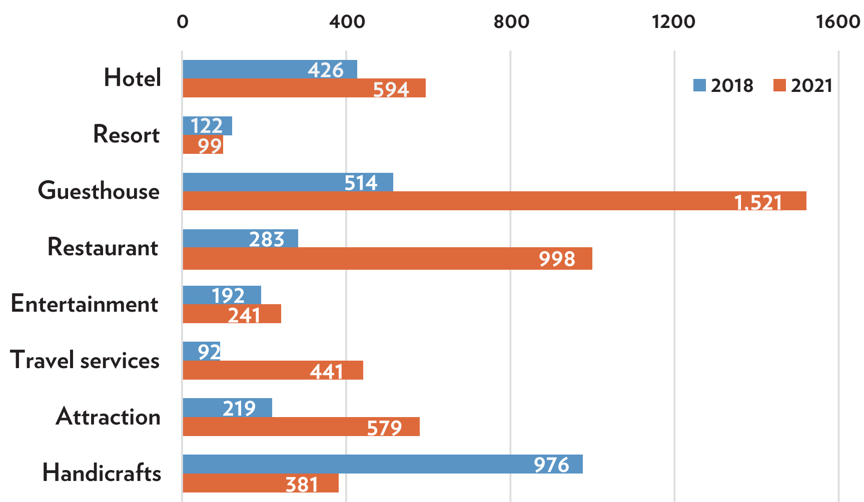
Table 3: Post-enumeration population counts and sample frame

Sector	Additional business registrations	Closures	Out-of-scope micro-businesses	Adjusted sample frame	Revised subsector population
Hotel	83	116	15	594	638
Resort	31	54	1	99	107
Guesthouse	529	452	52	1,521	2,300
Restaurant	498	618	47	998	1,399
Entertainment	185	114	0	241	269
Travel services	52	109	22	441	518
Attraction	114	86	223	579	2,148
Handicrafts	41	26	14	381	413
Total	**1,533**	**1,575**	**373**	**4,854**	**7,792**

NB. Weighted totals may not add due to rounding.

It should be noted that the final sample frame for the 2021 ESS differs considerably from the frame available for the 2018 survey (see figure 3).

Figure 3: Comparison of sample frame by sector, 2018 and 2021



The differences are due in part to changes in scope discussed in section 3.1 but are mostly the result of improvements in MICT administrative processes associated with business registrations. Many recent additions to the business register were found, in the current survey, to have been established prior to the 2018 survey, suggesting that for some sectors (notably guesthouses, restaurants and travel services) aggregate results will have been underestimated in the 2018 ESS. Conversely, no official register of handicraft establishments was available in 2018 with the estimated subsector population likely to have inadvertently included 'cottage-based' home production activity, leading to an overestimation of employment in that sector previously. Weighted results for these subsectors, therefore, may not be directly comparable across the two survey years.

4 Findings

4.1 Total employment

Table 4 shows total employment in T/H was 28,413 persons in businesses that were open and trading at the time of the survey. The 95% confidence interval puts this estimate in a range from 24,400 to 32,400 persons employed. Restaurants account for 6,700 persons followed by hotels with 5,400 employed persons as the largest sectors.

Given the logistical issues associated with travel restrictions, temporary business closures, and identification and contact with survey respondents at the time of the survey, some estimates are subject to greater sampling variability, resulting in wider confidence intervals (or lower confidence) in the estimated populations. For example, employment in the entertainment sector is estimated at 1,434 but due to sample variability, the 95% confidence interval puts this estimate as low as 123 or as high as 2,745.

Table 4: Weighted estimates of total employment in currently trading enterprises by sector

Sector	Estimate		%	Std error	95% LCL	95% UCL
Hotel	5,427		13.4	1,027.8	3,411	7,443
Resort	510		1.3	56.9	398	621
Guesthouse	4,752		11.7	179.2	4,401	5,104
Restaurant	6,738		16.6	826.1	5,117	8,358
Entertainment	1,434	*	3.5	668.3	123	2,745
Travel services	523		1.3	102.6	321	724
Attraction	4,487		11.0	757.3	3,002	5,973
Handicrafts	4,543		11.2	951.3	2,677	6,409
Total	**28,413**		**100.0**	**2,052**	**24,387**	**32,440**

*NB. Weighted totals may not add due to rounding. * denotes a relative standard error above 25% and estimates should be treated with caution.*

In total, almost one-third of all T/H enterprises were temporarily closed at the time of the survey in May-June 2021. A somewhat remarkable finding was that in all cases of temporary closure, firms reportedly maintained many, or all, of their staff during periods of business closure. To assess the validity of these findings, a small subset of businesses was asked follow-up questions to clarify what staff were doing and how they were being remunerated during periods when the business was earning no revenue. Common responses included:

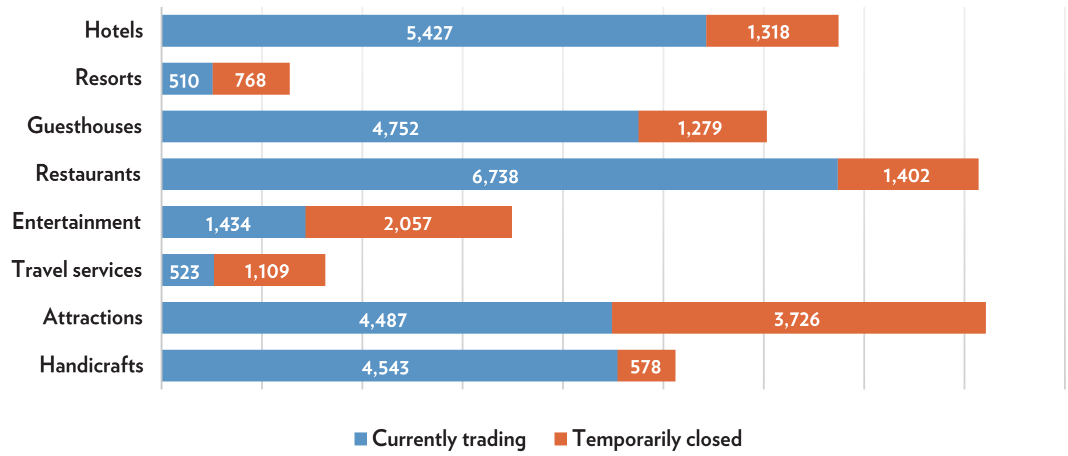
- The employees would take turns to come for cleaning, or do basic work to maintain equipment, tools etc, with staff rostered for around 10 to 15 days per month.
- They are mostly family and/or relatives of the employer.
- They are maintained to share the burden as these employees have no other source of income and some have worked for the businesses for many years.
- Only partial wages are paid.

In total, a further 12,240 persons were reported as 'employed' in these temporarily closed establishments. As these staff were not actively engaged in any productive capacity, nor being adequately remunerated, their classification as 'employed' is tenuous, leaving many at risk of falling below the poverty line. Such workers would be better defined as 'stood down', 'furloughed' or 'marginally attached' since they do not meet the activity test requirements to be classified as "employed" according to International Labor Organization (ILO) definitions.

However, in order to present the full survey results, subsequent tables and figures distinguish these persons as 'employed in temporarily closed businesses'.

As shown in figure 4, for the resort, entertainment, and travel services sectors more staff were 'employed in temporarily closed businesses' and those currently operating. Similarly, almost half of staff of attractions enterprises were 'employed in temporarily closed businesses'.

Figure 4: Total employment by sector and business trading status



4.1.1 Employment change, 2018 to 2021

Comparison with the 2018 ESS suggests only a modest fall in aggregate employment from 42,260 in 2018 to 40,650 in 2021. However, closer examination of the results in table 5, highlights the implications of the scope and coverage changes discussed in section 3.5, with an apparent doubling of employment in the guesthouse, restaurant and attraction sectors, while employment in handicrafts has fallen from 14,400 to just 5,100 persons.

Table 5: Employment by sector, 2018 and 2021

Sector	2018	2021		
	Estimated employment	Temporarily closed	Currently trading	Estimated total employment
Hotel	8,564	1,318	5,427	6,745
Resort	2,203	768	510	1,277
Guesthouse	2,821	1,279	4,752	6,031
Restaurant	4,526	1,402	6,738	8,140
Entertainment	3,594	2,057	1,434	3,491
Travel services	1,389	1,109	523	1,632
Attraction	4,728	3,726	4,487	8,214
Handicrafts	14,435	578	4,543	5,122
Total	**42,260**	**12,237**	**28,413**	**40,650**

NB. Weighted totals may not add due to rounding.

An alternative estimate of the net change in T/H employment between 2018 and 2021 can be derived from the subset of 430 firms who were selected in both survey years. Results in table 6 show the unweighted actual employment numbers of this matched sample for both years. Total employment for this subset has fallen from 7,117 to 3,762, (a 47% contraction). Of those currently employed around one third (1,227) are in temporarily closed businesses. Travel services (78.7%) recorded the highest level of overall staff reduction while the guesthouses (23.3%) and attractions (22.3%) had maintained over three quarters of their previous staff numbers.

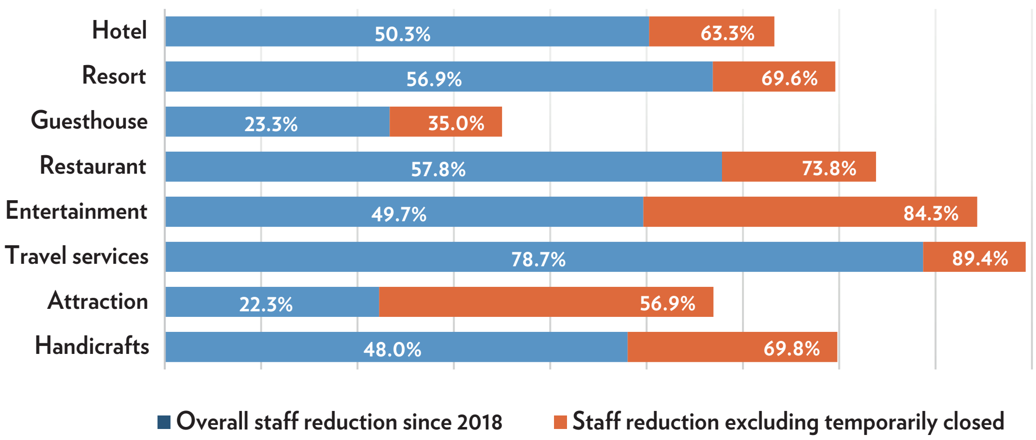
Table 6: Employment by sector, 2018 and 2021: Matched sample

Sector	2018 Actual employment	2021 Temporarily closed	Currently trading	Total employment	Employment change (%)
Hotel	3,539	460	1,300	1,760	50.3%
Resort	684	87	208	295	56.9%
Guesthouse	557	65	362	427	23.3%
Restaurant	294	47	77	124	57.8%
Entertainment	459	159	72	231	49.7%
Travel services	310	33	33	66	78.7%
Attraction	764	265	329	594	22.3%
Handicrafts	510	111	154	265	48.0%
Total	**7,117**	**1,227**	**2,535**	**3,762**	**47.1%**
Number of firms:	430	127	266	393	

Of the 430 matched survey results, 266 firms were currently trading, 127 were temporarily closed while the remaining 37 firms have permanently closed.

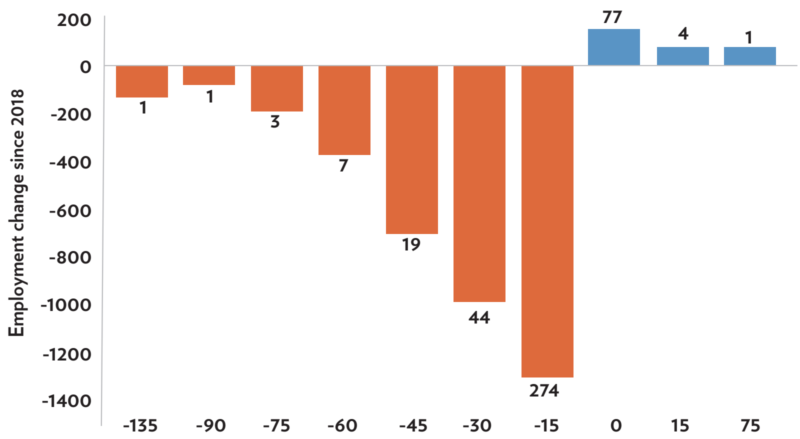
If we consider only employment in actively trading enterprises, the estimated contraction in employment since 2018 increases to 64.4% ranging from 35% of guesthouse employment to 89.4% of travel services employment (see figure 5).

Figure 5: Employment change since 2018: Matched sample by sector and trading status



While most firms in the matched sample have reduced staff numbers since 2018, 82 of the 430 experienced growth in employment over the three-year period. Figure 6 plots the actual employment change for each respondent in the matched sample (with employment change interval size of 15 staff). This shows that while 274 (of the 430 matched firms) reduced their staff numbers by 1 to 15 employees, and one firm by 135 employees, there were 77 firms who increased their establishment by up to 15 staff members, 4 firms by 15 to 30 staff and one firm by between 75 and 90 new staff since 2018.

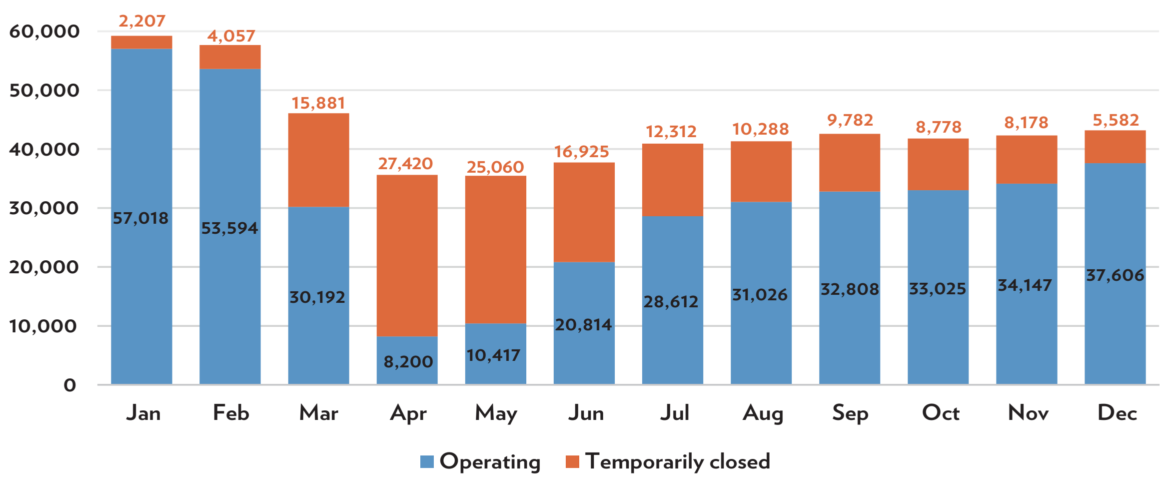
Figure 6: Employment growth/decline since 2018 by firm: Matched sample



4.1.2 Impact of COVID-19 on employment

The survey also collected employment data for each month of 2020, enabling analysis of the direct impact of COVID-19 on T/H employment. These results are presented in figure 7 and show that total T/H employment had grown to over 59,000 by January 2020[12] following the all-time high number of international tourist arrivals in 2019. By April 2020, this had fallen to just 8,200 in establishments that remained open following the COVID-19 lockdown and travel bans. Some 27,400 persons remained 'employed in temporarily closed businesses'. Employment numbers recovered steadily over the remainder of 2020 to be almost 43,200 by December 2020.

Figure 7: Total employment in 2020 by month and business trading status



12 Temporary business closures were reported in January and February 2020, prior to any government lockdown requirements. Over half of employment in temporarily closed businesses in January 2020 was reported by travel services enterprises as a consequence of international booking cancellations.

Following a secondary outbreak of COVID-19 in late April 2021, just prior to data collection for this survey, total employment had dropped to 40,650 persons with almost one-third (12,237) associated with temporarily closed businesses. This represents a 50.2% contraction in employment in actively trading enterprises, or a 31.4% contraction when taking into account those 'employed in temporarily closed businesses' since the high of 59,200 recorded in January 2020.

4.2 Impact of COVID-19 on turnover and business operations

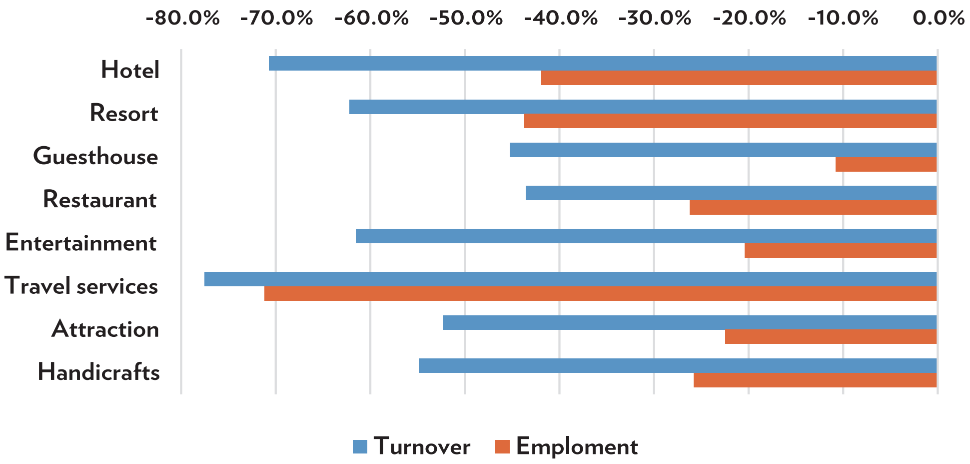
The survey results also confirm that COVID-19 has had a devastating impact on the revenues of tourism enterprises with average turnover falling by almost 65% between 2019 and 2020 (table 7). As can be seen in figure 8, the reported fall in turnover revenues is considerably higher in percentage terms compared to employment. This reflects the number of staff reported as still 'employed in temporarily closed businesses' and highlights the precarious nature of this employment given business revenues are insufficient to pay salaries and wages.

Table 7: Impact of COVID-19 on turnover, employment, and business operations

Sector	Change in turnover	Change in employment#	Scaled down or discontinue services	Cut staff numbers	Cut staff wages	Reduced trading hours	Restructured operations	Increased borrowings
	- % -		- % of firms -					
Hotel	-70.7	-41.9	32.7	67.0	50.5	46.6	9.0	5.9
Resort	-62.2	-43.7	38.5	73.1	53.8	41.0	3.8	1.3
Guesthouse	-45.3	-10.8	21.4	52.1	31.0	26.7	9.6	3.5
Restaurant	-43.5	-26.2	20.5	75.9	40.2	45.5	6.3	6.3
Entertainment	-61.5	-20.4	12.7	71.8	33.8	32.4	22.5	11.3
Travel services	-77.5	-71.2	43.7	76.7	55.3	37.9	5.8	7.8
Attraction	-52.3	-22.5	25.3	54.9	22.0	39.6	7.7	1.1
Handicrafts	-54.9	-25.8	14.1	36.8	21.7	33.0	5.7	2.8
Region								
Vientiane Capital	-65.7	-36.2	27.8	51.3	41.8	36.1	6.8	5.3
Central	-66.0	-35.6	37.2	69.0	46.6	36.9	9.7	3.8
North	-66.4	-28.5	23.4	63.9	37.7	45.7	9.8	5.7
South	-52.0	-20.3	17.8	59.1	31.7	27.0	7.8	4.3
Total %	**-64.6**	**-31.4**	**24.4**	**61.6**	**36.3**	**36.6**	**8.5**	**4.7**

 # Change in employment is calculated from January 2020 to May 2021.

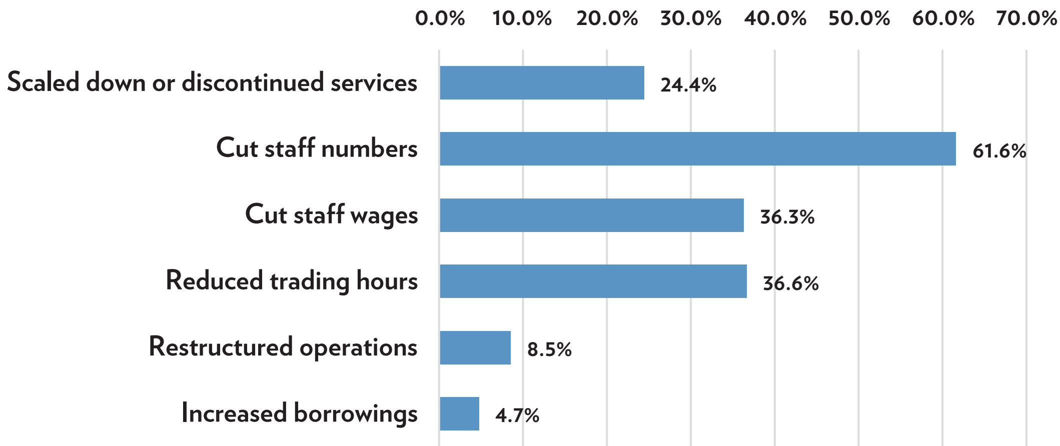
Figure 8: COVID-19 impact on turnover and employment by sector



Geographically, the COVID-19 impact – while still devastating – was least severe in the south region, comprising Champasak, Attapeu, Saravan and Sekong provinces. This region, which receives the least number of international tourist visits each year, recorded an average 52% fall in turnover between 2019 and 2020.

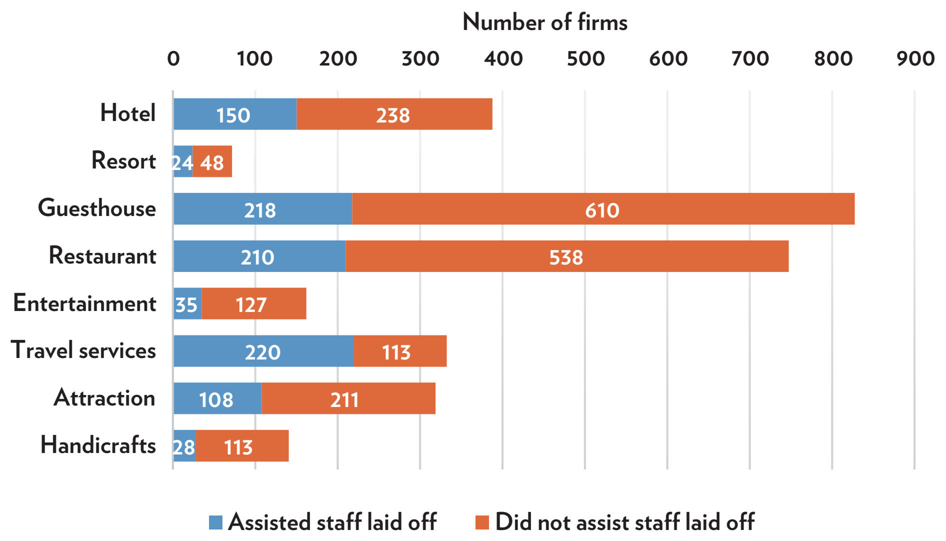
The most common actions taken to mitigate the impacts of COVID-19 on business operations were to cut staff numbers (62%), wages (36%) and/or to reduce trading hours (37%). Around one quarter of all businesses scaled down their operations or discontinued some service offerings. Less than one-in-twenty firms found it necessary to increased borrowings (4.7%).

Figure 9: Measures taken to mitigate COVID-19 impacts



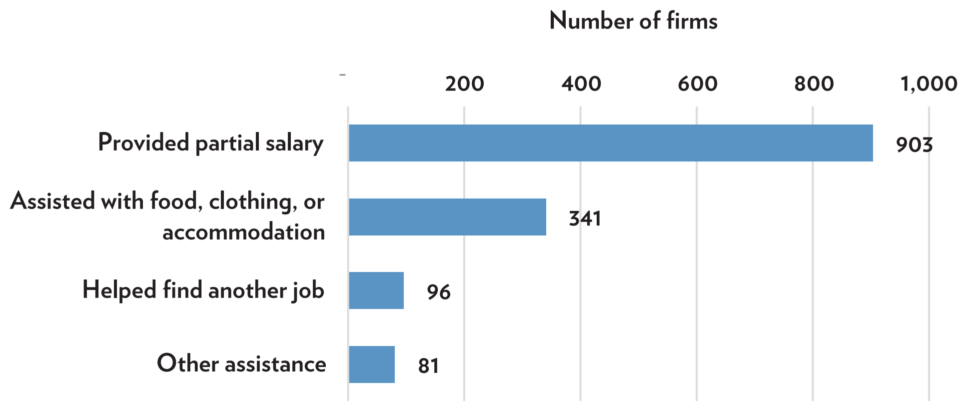
In most cases, employers were unable to offer any assistance to staff who had been laid off as a consequence of the economic downturn. Staff who lost their jobs from an estimated 610 guesthouses and 538 restaurants received no assistance from their employer (see figure 10).

Figure 10: Employer assistance to staff laid off by sector



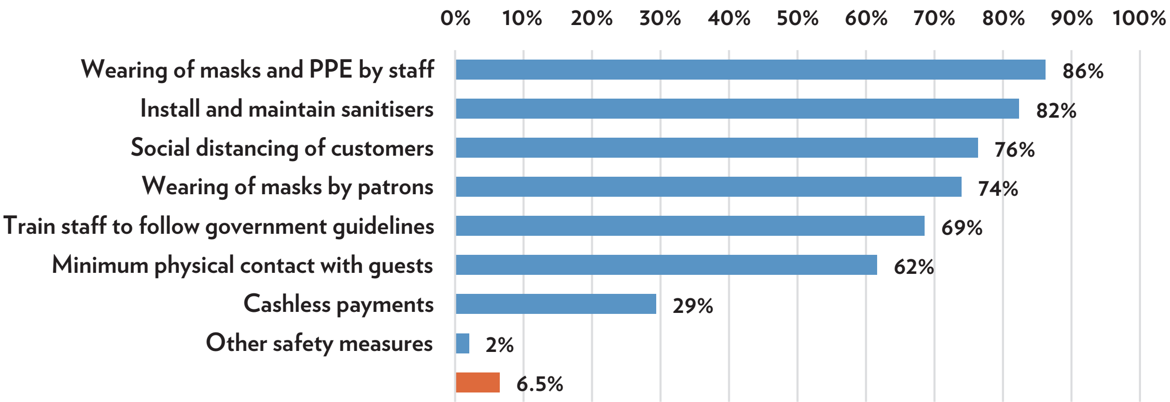
Where assistance was provided, the most common types of assistance to displaced workers was through provision of a partial salary (by 903 firms) and/or contributions of food, clothing, or accommodation (see figure 11).

Figure 11: Types of assistance provided to displaced workers



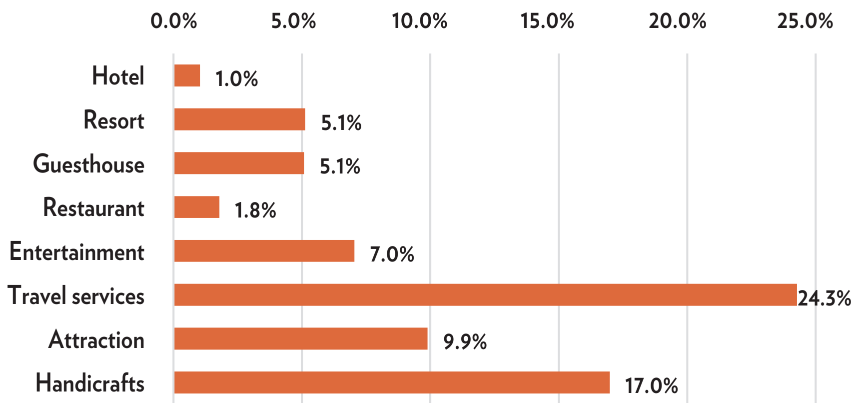
A majority of firms reported having implemented a range of safety measures in response to COVID-19. The most common response (of 86% of all establishments) was the introduction of masks and PPE for staff members. Around three-in-four businesses have also mandated the wearing of masks by patrons.

Figure 12: Safety measures introduced in response to COVID-19



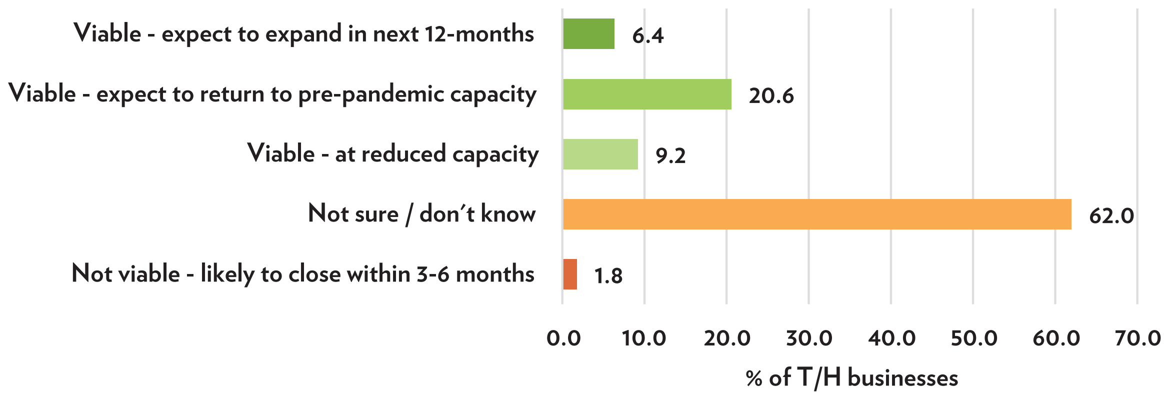
Of some concern, is that 6.5% of establishments have implemented no safety measures (24% of travel services establishments). However, the majority of respondents (86%) who stated they had not implemented safety reforms were temporarily closed and considered it unnecessary to introduce safety measures at this time.

Figure 13: Proportion of T/H employers not undertaking safety measures by sector



Firms were also asked to assess the long-term viability of their business beyond the current economic downturn. However, given the level of uncertainty surrounding the duration of the global recession and prolonged travel bans, three-in-five respondents (62%) were uncertain about the ongoing viability of their business. Around one-in-five businesses expected to return to their pre-pandemic capacity in the next 12 months while around 6% of businesses expect to expand their operations in the next 12 months. A further 9% consider their businesses to be viable, however, they expect that they will continue to operate at a reduced capacity. Under 2% have assessed that their business operation is not viable and plan to close permanently within 3 to 6 months.

Figure 14: Long-term viability of T/H enterprises



4.3 Characteristics of firms

The ESS collected a range of data items that can be used to categorise T/H enterprises in Lao PDR to give additional context to the research findings. Table 8 provides weighted estimates of the total number of T/H establishments by sector and region and includes, key characteristics such as firm size, trading status, business ownership, longevity, and capacity utilisation. Corresponding data providing a breakdown of total T/H sector employment and average employment can be found in tables 10 and 11 respectively.

The North region has the highest concentration of T/H establishments accounting for 40% (1,170 of 4,854) of all registered businesses. This region also recorded the highest proportion of temporary closures with three-in-four respondents reporting their business was closed at the time of the survey.

The average firm size in Lao PDR T/H is currently 8.4 employees including staff fully employed and those 'marginally attached' or 'employed in temporarily closed businesses' (compared with 15 employees in 2018) reflecting the downsizing associated with the COVID-19 pandemic. Over 93% of firms are either small (employing six to 20 persons) or micro-businesses (employing fewer than six workers). These businesses account for 60% of total employment. Conversely, medium (21 to 100 staff), large (101 to 200 staff) and very large firms (over 200 staff) account for less than 7% and 40% of all employment (see figure 15).

The average age of all T/H businesses was estimated to be 10.5 years. Start-up businesses are defined as those who had been operating for two years or less; new businesses, three to eight years in operation; established businesses, nine to 20 years in operation, while long-term businesses are defined as those in operation for 21 years or longer. While the distribution of business longevity is very similar to that found in 2018, the proportion of start-up businesses has fallen to 7% (down from 11% in 2018) reflecting the higher risk and uncertainty in the current business climate.

Table 8: Characteristics of tourism enterprises

Sector	Vientiane Capital	Central	North	South	Total	%
Hotel	206	144	142	101	594	12.2%
Resort	18	41	26	14	99	2.0%
Guesthouse	176	503	605	236	1,521	31.3%
Restaurant	99	337	432	129	998	20.6%
Entertainment	37	20	153	33	241	5.0%
Travel services	281	40	100	20	441	9.1%
Attraction	22	132	314	111	579	11.9%
Handicrafts	59	76	198	48	381	7.9%
Trading status						
Currently trading	587	1,043	1,107	496	3,233	66.6%
Temporarily closed	310	250	863	198	1,621	33.4%
Firm size						
Very large	2	3	4		9	0.2%
Large	2		4		6	0.1%
Medium	89	65	124	44	323	6.6%
Small	270	359	597	210	1,436	29.6%
Micro	533	866	1,242	439	3,080	63.5%
Business longevity						
Long term	121	109	264	32	527	10.9%
Established	417	663	812	301	2,192	45.2%
New	309	425	759	289	1,783	36.7%
Start-up	49	97	135	71	352	7.2%
Business ownership						
Lao	798	1,255	1,725	655	4,432	91.3%
Mixed	60	20	131	30	241	5.0%
Foreign	40	18	115	9	181	3.7%
Capacity utilisation						
High	14	41	81	5	141	2.9%
Moderate	68	314	456	61	899	18.5%
Low	155	427	498	159	1,239	25.5%
At risk	378	418	635	341	1,771	36.5%
Unsustainable	282	94	300	127	804	16.6%
Leased or rented premises						
Yes	237	130	511	174	1,051	21.7%
No	660	1,163	1,460	519	3,803	78.3%
Total	**897**	**1,293**	**1,970**	**693**	**4,854**	**100.0%**
Region %	**18.5%**	**26.6%**	**40.6%**	**14.3%**	**100.0%**	

NB. Weighted totals may not add due to rounding.

Figure 15: Firm size and share of employment

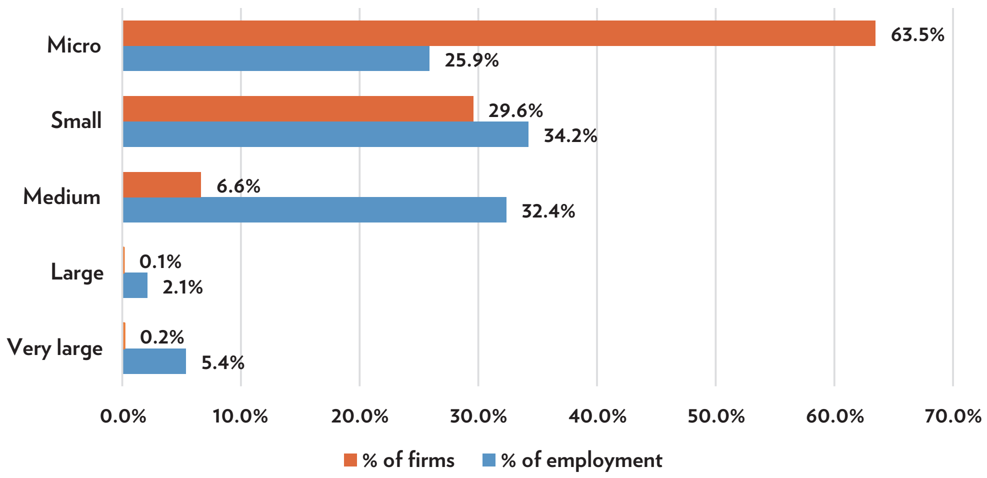


Figure 16: Business longevity by region

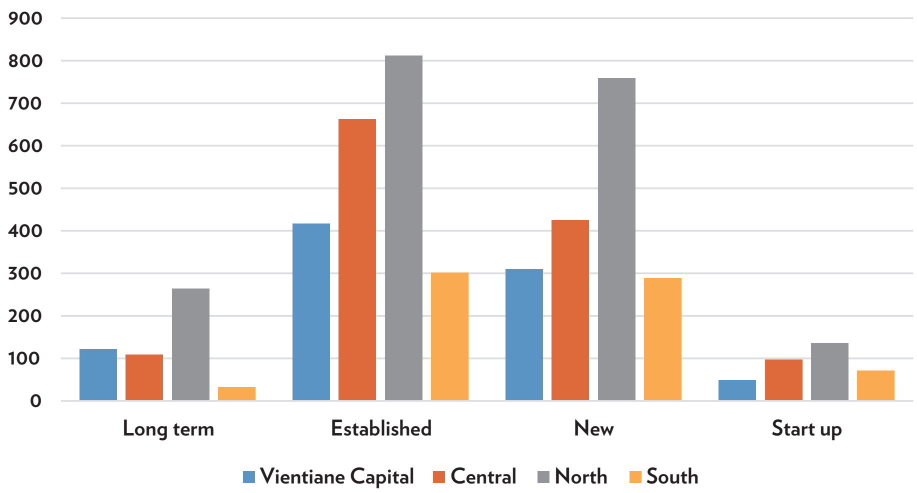
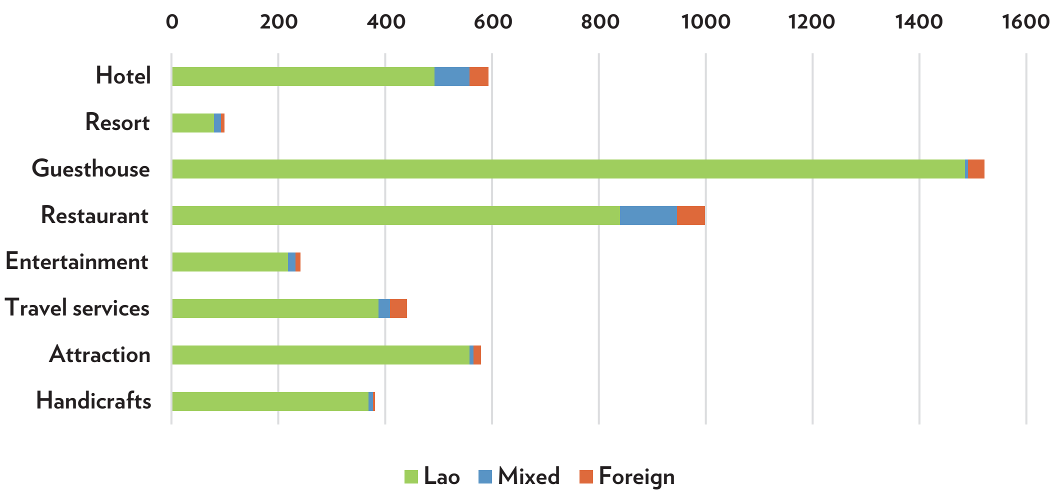
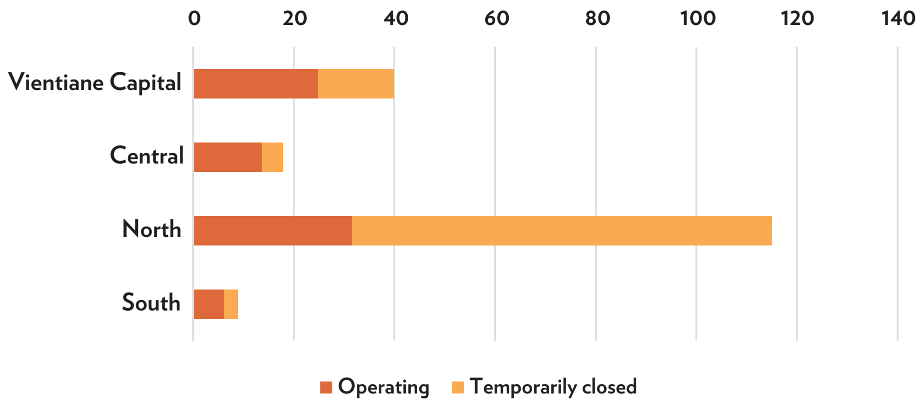


Figure 17: Business ownership by sector



While most T/H enterprises are fully Lao owned and operated (91.3%), foreign and/or mixed ownership was found to be most prevalent in hotels and restaurants (figure 17). There has been a modest increase in the level of foreign investment in the guesthouse, travel services, and entertainment sectors since 2018. Most foreign investment continues to be concentrated in the north region, with 115 foreign owned enterprises, followed by Vientiane Capital (40 enterprises)[13]. However, 84 of the 115 foreign businesses in the north region were temporarily closed at the time of the survey. Foreign owned businesses (3.7% of firms) are typically larger establishments, averaging 15.4 employees (see table 11).

Figure 18: Foreign business ownership by region and trading status



The survey also collected data on month-by-month occupancy rates for 2020 and related measures of capacity utilisation. Analysis of these measures show that almost 80% of all T/H businesses are currently operating at below 50% capacity in year-average terms[14]. Furthermore, capacity utilisation rates have deteriorated considerably since 2018 (see figure 19) with the proportion of businesses assessed as either at risk or unsustainable increasing from 17% to 54%. For comparative purposes, businesses have been categorised as having 'high', 'moderate', 'low', 'at risk', or 'unsustainable' levels of capacity utilisation. Firms exhibiting unsustainable capacity utilisation rates are those reporting to be operating at an average of 10% or less of their capacity. At risk firms are those reporting rates between 11 and 30%; low utilisation, rates between 31 and 50%; and moderate from 51 to 70%. Firms reporting above 70% capacity utilisation are categorised as high. Additional characteristics of accommodation establishments are presented in table 9.

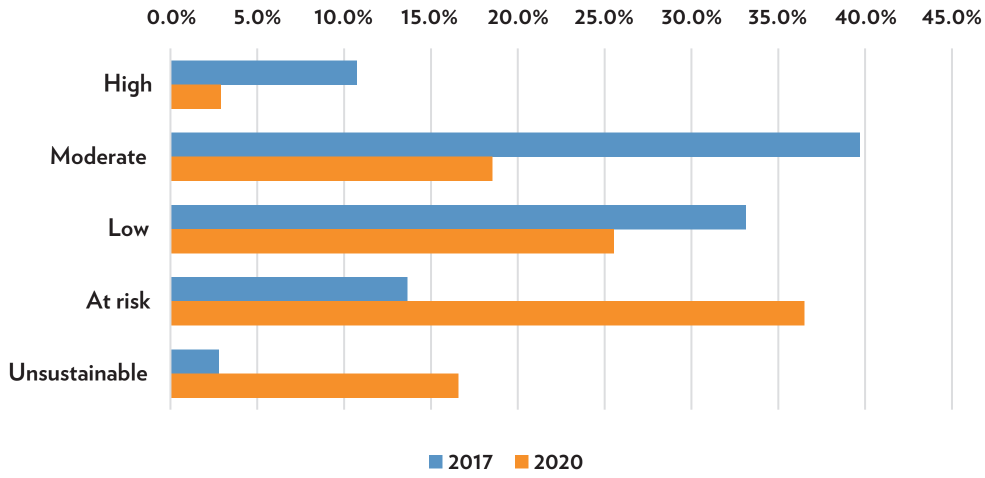
Table 9: Characteristics of accommodation enterprises

Sector	Number of establishments	Average number of rooms	Average number of staff	% female	Average occupancy rate %	International tourists % of guests
Hotel	594	39.8	11.4	51.9	26.5	41.6
Resort	99	25.6	12.9	67.8	29.2	51.4
Guesthouse	1,521	19.8	4.0	61.9	29.0	32.9
Total	**2,214**	**29.6**	**16.8**	**57.6**	**27.9**	**38.6**

13 This measure is a count of businesses only, no data was collected as to the level of foreign investment.
14 This calculation excludes months where a business was temporarily closed when occupancy rates were zero.

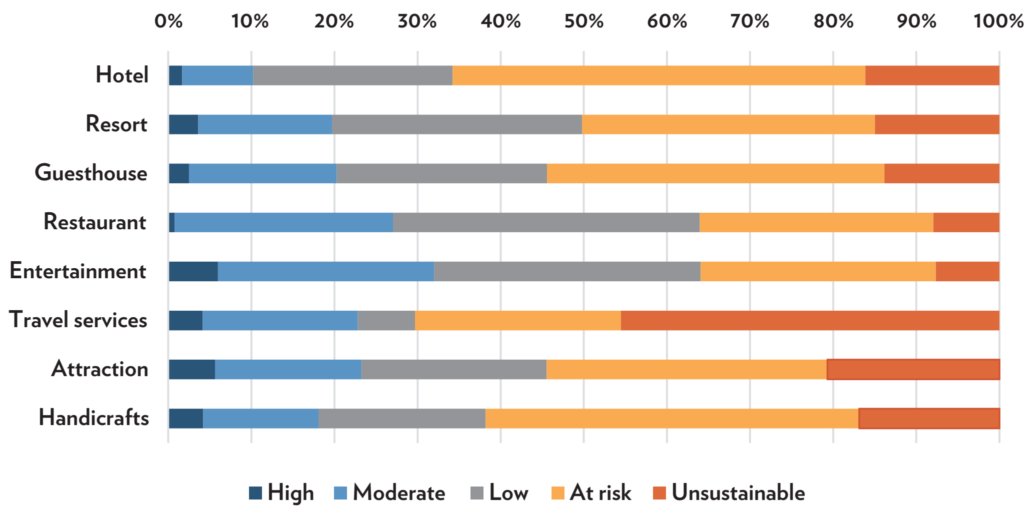
On average, the accommodation enterprises had 30 rooms and employed 17 staff, of which 58% were female. International tourists make up 40% of total guests in accommodation establishments ranging from one-third of guesthouse patrons to over half of resort guests (51%). Reported occupancy rates averaged just 28% for 2020 which is almost half the official published occupancy rate for 2019 of 54%[15].

Figure 19: Capacity utilisation, 2017 and 2020



Currently, capacity utilisation rates for over 75% of travel services and 65% of hotels are considered either at risk or unsustainable (see figure 20).

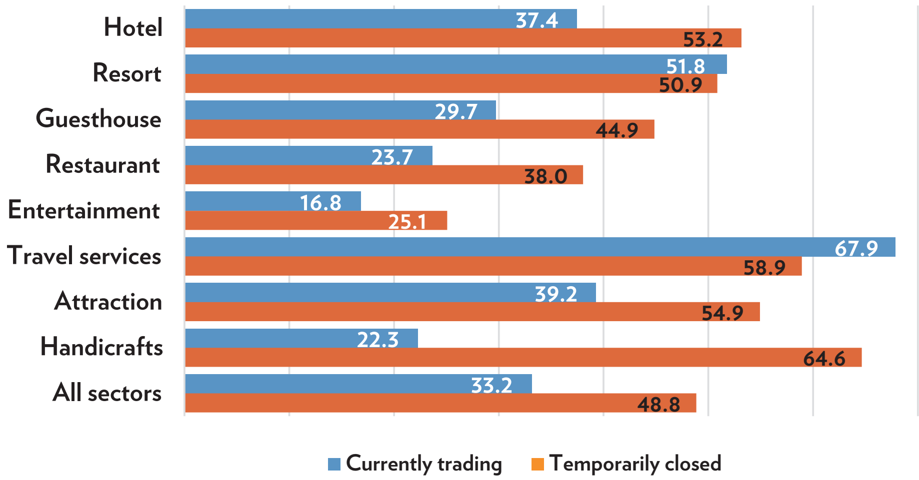
Figure 20: Capacity utilisation by sector



The decline in an enterprises' capacity utilisation, and the likelihood that the business is currently closed, is strongly correlated to its reliance on international tourists as a share of its customer base. Across all sectors, international tourists make up 33% of clients of firms that are currently trading and 49% of clients of temporarily closed businesses. This can be seen in figure 21 which compares the average percentage of business customers who are international tourists by current trading status and sector.

15 MICT Tourism Development Department. Statistical Report on Tourism in Laos, 2020, Table 18.

Figure 21: Enterprise trading status by reliance on international tourists

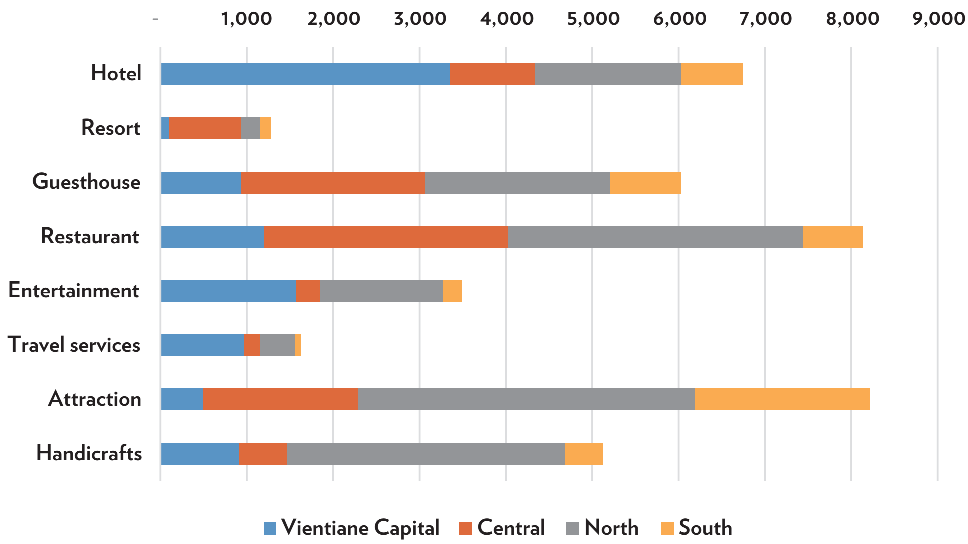


4.4 Employment composition

Just over 40% of all T/H employment – fully employed and 'marginally attached' / 'employed by temporarily closed businesses' – (16,400 jobs) occurs in the Northern provinces with the largest sectors being attractions, restaurants, and handicrafts (3,900, 3,400 and 3,200 jobs respectively). Over half (56%) of employed staff in temporarily closed businesses are in the north region which includes Luang Prabang – the preferred holiday destination for a majority of international tourists.

Vientiane Capital and the central region employ roughly equal numbers (9,500 jobs or 24% of total employment each) but with significant differences in employment by sector (see table 11 and figure 22). The south region employs a further 5,100 workers or 12.5% of all T/H employment.

Figure 22: Employment by sector and region



Findings

Table 10: Employment by sector, region, and firm characteristics

Sector	Vientiane Capital	Central	North	South	Total	%
Hotel	3,357	981	1,689	718	6,745	16.6%
Resort	99	835	221	123	1,277	3.1%
Guesthouse	938	2,122	2,146	825	6,031	14.8%
Restaurant	1,203	2,828	3,412	697	8,140	20.0%
Entertainment	1,570	284	1,425	212	3,491	8.6%
Travel services	972	183	409	67	1,632	4.0%
Attraction	494	1,798	3,906	2,016	8,214	20.2%
Handicrafts	915	556	3,212	439	5,122	12.6%
Trading status						
Currently trading	7,442	7,598	9,586	3,787	28,413	69.9%
Temporarily closed	2,107	1,988	6,833	1,309	12,237	30.1%
Firm size						
Very large	903	535	739		2,176	5.4%
Large	407		456		862	2.1%
Medium	3,794	2,700	4,989	1,681	13,164	32.4%
Small	2,687	3,188	6,049	1,998	13,922	34.2%
Micro	1,759	3,163	4,187	1,417	10,526	25.9%
Business longevity						
Long term	2,359	1,933	3,192	795	8,279	20.4%
Established	3,695	3,612	6,028	2,010	15,344	37.7%
New	3,140	3,149	6,183	1,899	14,371	35.4%
Start-up	355	893	1,017	392	2,657	6.5%
Business ownership						
Lao	7,559	8,398	13,679	4,848	34,484	84.8%
Mixed	1,092	392	1,685	204	3,372	8.3%
Foreign	898	797	1,055	45	2,795	6.9%
Capacity utilisation						
High	184	1,738	537	19	2,478	6.1%
Moderate	1,771	2,284	3,719	322	8,096	19.9%
Low	2,600	2,797	5,073	1,540	12,010	29.5%
At risk	3,815	2,370	4,519	2,147	12,851	31.6%
Unsustainable	1,179	398	2,571	1,068	5,215	12.8%
Total	**9,549**	**9,587**	**16,419**	**5,097**	**40,651**	**100.0%**
Region %	**23.5%**	**23.6%**	**40.4%**	**12.5%**	**100.0%**	

NB. Weighted totals may not add due to rounding.

While average employment was 8.4 employees across all T/H businesses there was considerable variation in firm size, ranging from micro-businesses employing just 3.2 staff in the South region to 364 staff in very large firms in Vientiane Capital.

Foreign owned businesses (3.7% of firms) are generally larger enterprises (accounting for 6.9% of total employment), employing on average 15.4 persons. The average employment of foreign owned establishments was as high as 44.8 staff in the Central region but only 5.1 staff in the South region.

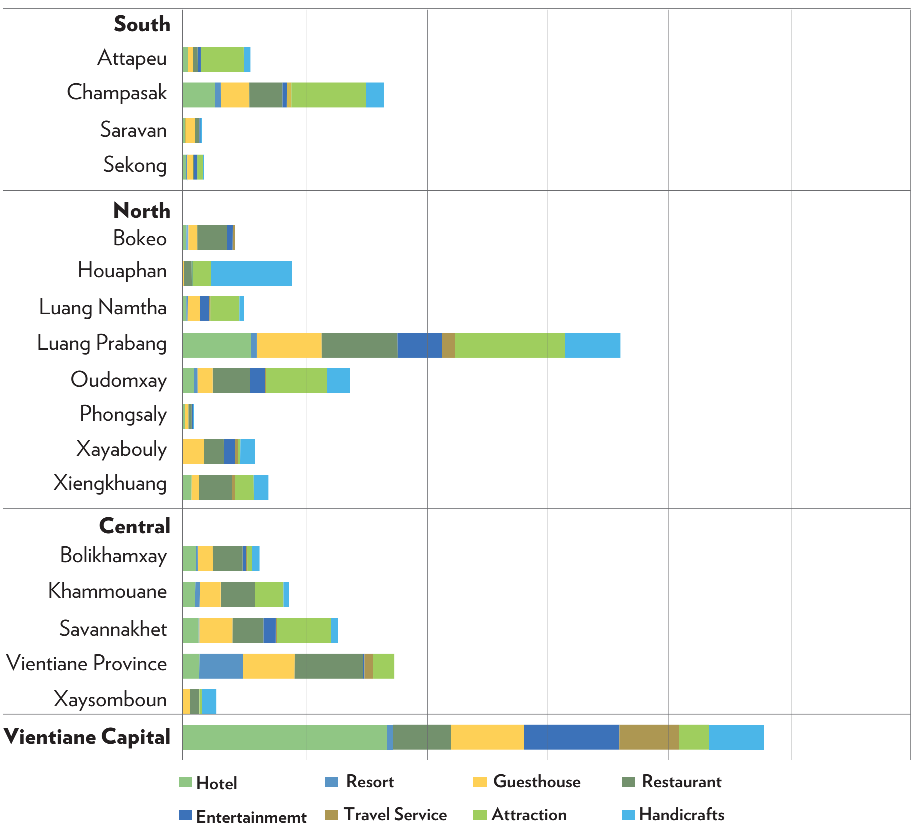
Table 11: Average number of employees per establishment by sector, region and firm characteristics

Sector	Vientiane Capital	Central	North	South	Total
Hotel	16.3	6.8	11.9	7.1	11.4
Resort	5.7	20.2	8.3	8.8	12.9
Guesthouse	5.3	4.2	3.5	3.5	4.0
Restaurant	12.1	8.4	7.9	5.4	8.2
Entertainment	43.0	14.5	9.3	6.5	14.5
Travel services	3.5	4.6	4.1	3.3	3.7
Attraction	22.6	13.6	12.4	18.2	14.2
Handicrafts	15.5	7.3	16.2	9.1	13.4
Trading status					
Currently trading	12.7	7.3	8.7	7.6	8.8
Temporarily closed	6.8	8.0	7.9	6.6	7.6
Firm size					
Very large	364.0	193.8	201.0		244.1
Large	164.0		124.0		140.1
Medium	42.6	41.6	40.1	38.0	40.8
Small	10.0	8.9	10.1	9.5	9.7
Micro	3.3	3.7	3.4	3.2	3.4
Business longevity					
Long term	19.4	17.7	12.1	24.6	15.7
Established	8.9	5.5	7.4	6.7	7.0
New	10.1	7.4	8.1	6.6	8.1
Start-up	7.2	9.3	7.5	5.5	7.6
Business ownership					
Lao	9.5	6.7	7.9	7.4	7.8
Mixed	18.3	19.4	12.9	6.8	14.0
Foreign	22.5	44.8	9.2	5.1	15.4
Capacity utilisation					
High	13.5	42.5	6.6	4.0	17.6
Moderate	26.2	7.3	8.2	5.3	9.0
Low	16.7	6.6	10.2	9.7	9.7
At risk	10.1	5.7	7.1	6.3	7.3
Unsustainable	4.2	4.2	8.6	8.4	6.5
Total	**10.6**	**7.4**	**8.3**	**7.4**	**8.4**

While wholly Lao-owned establishments represent the majority of firms (91.9%) and collectively employ the most workers (84.8%), these are predominantly smaller scale operations averaging 7.8 persons employed. Higher capacity utilisation rates were generally associated with higher average employment, ranging from 6.5 staff in unsustainable businesses to 17.6 staff in firms with high occupancy and utilisation rates.

Figure 23 shows the distribution of total employment by sector at the provincial level. Here it can be seen that most of the employment in hotels is concentrated in Vientiane Capital followed by Luang Prabang. Similarly, most resort employment (65%) occurs in Vientiane Province in the Central region. The largest concentration of handicrafts employment occurs in Houaphan and accounts for approximately 80% of T/H employment in that province. The four largest provinces in terms of total T/H employment correspond exactly with the top destinations for international visitors – Vientiane Capital, Luang Prabang, Vientiane Province (in particular, Vang Vieng) and Champasak. Further details on employment characteristics by province can be found in Annex D.

Figure 23: Employment by province and sector



4.4.1 Workforce composition

Table 12 below presents further detail of the composition of the T/H workforce in terms of gender, temporary and seasonal workers, foreign workers, and persons who are disabled or disadvantaged.

Female workers account for around 57% of the total workforce in T/H. Female representation is highest in the handicraft's subsector, accounting for 77% of the workforce (see figure 24). In contrast, travel services, attractions, and entertainment all have a higher proportion of males than females (female employment shares of 42%, 44%, and 46% respectively).

Employers reported a total of 7% of their workers to be either disadvantaged or disabled. Disadvantaged workers were also more highly represented in the handicraft's subsector comprising 12% of the workforce. Disadvantaged and disabled workers make up approximately 10% of medium and large enterprise workforces, are more prevalent in Vientiane Capital (10.7%), and in Lao-owned establishments (7.3%).

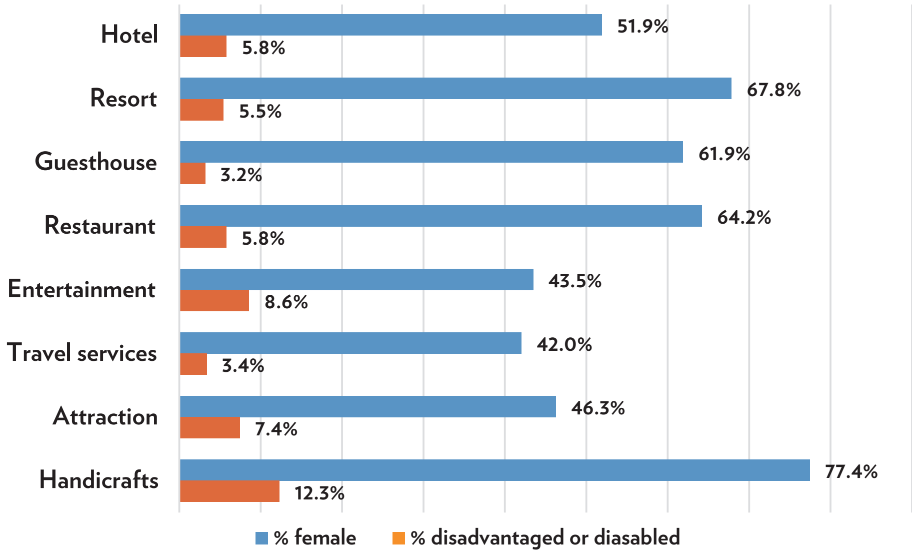
Table 12: Workforce composition

Sector	Total employed	% female	% temporary/ seasonal[1]	% foreign	% disabled/ disadvantaged[2]
Hotel	6,745	51.9%	2.7%	5.9%	5.8%
Resort	1,277	67.8%	2.8%	2.5%	5.5%
Guesthouse	6,031	61.9%	13.1%	1.2%	3.2%
Restaurant	8,140	64.2%	3.0%	2.5%	5.8%
Entertainment	3,491	43.5%	3.3%	1.6%	8.6%
Travel services	1,632	42.0%	5.5%	5.8%	3.4%
Attraction	8,214	46.3%	2.5%	0.6%	7.4%
Handicrafts	5,122	77.4%	3.7%	0.6%	12.3%
Region					
Vientiane Capital	9,549	48.8%	1.5%	4.2%	10.7%
Central	9,587	59.7%	6.3%	0.9%	2.6%
North	16,419	60.2%	5.8%	2.4%	7.4%
South	5,097	59.6%	2.9%	1.1%	4.7%
Trading status					
Currently trading	28,413	60.3%	5.2%	2.2%	6.6%
Temporarily closed	12,237	50.4%	3.0%	2.6%	6.9%
Firm size					
Very large	2,176	69.8%	1.4%	5.4%	4.1%
Large	862	71.5%	0.0%	4.0%	10.9%
Medium	13,164	52.3%	2.9%	1.9%	11.1%
Small	13,922	54.8%	3.0%	1.9%	4.7%
Micro	10,526	63.1%	9.7%	2.6%	4.0%
Business longevity					
Long term	8,279	57.0%	8.9%	1.0%	5.5%
Established	15,344	57.2%	3.0%	2.6%	9.0%
New	14,371	58.1%	1.9%	2.5%	4.6%
Start-up	2,657	55.2%	14.3%	3.0%	8.2%
Business ownership					
Lao	34,484	57.4%	4.9%	0.8%	7.3%
Mixed	3,372	55.1%	3.2%	10.6%	2.3%
Foreign	2,795	59.3%	1.3%	10.6%	4.9%
Capacity utilisation					
High	2,478	60.2%	2.7%	1.4%	1.7%
Moderate	8,096	56.8%	11.8%	2.8%	4.6%
Low	12,010	59.2%	2.7%	1.8%	7.5%
At risk	12,851	56.9%	2.2%	2.6%	6.9%
Unsustainable	5,215	53.4%	4.2%	2.4%	10.1%

Total	40,651	23,296	1,852	933	2,718
%	100.0%	57.3%	4.6%	2.3%	6.7%

NB. Weighted totals may not add due to rounding: 1. Seasonal/temporary workers as at December 2020; 2. Combines disabled and disadvantaged workers due to high relative standard errors at the detailed level.

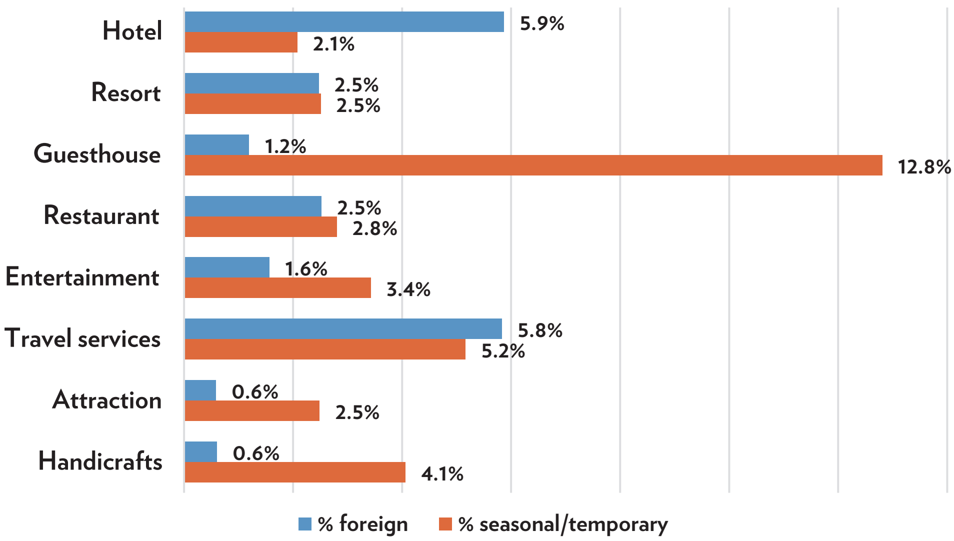
Figure 24: Female and disadvantaged workers by sector



Seasonal or temporary workers contributed 1,850 persons, or 4.6%, to total T/H employment as at December 2020. While only 11% of businesses reported that they hire temporary or seasonal workers, the proportion of temporary/seasonal staff has doubled since the 2018 ESS (from 2.3%). This is likely to reflect the increased uncertainty of hiring new staff post COVID-19 lockdowns. Proportionally, guesthouses engage the greatest share of temporary staff (12.8%) followed by handicrafts (4.1%).

Foreign workers (2.3% of the workforce) are most commonly found in hotels (5.9%) and travel services (5.8%). While Lao-owned enterprises recruit less than 1% foreign workers, they comprise one-in-ten staff employed by mixed and foreign owned businesses.

Figure 25: Seasonal/temporary and foreign workers by sector



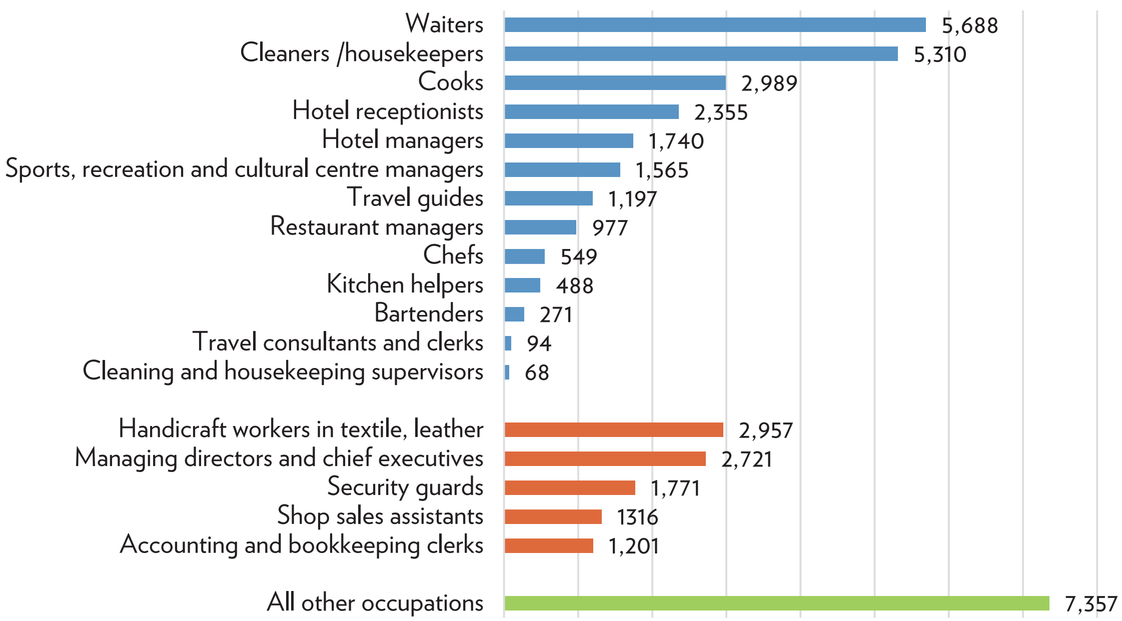
4.4.2 Occupational composition

To facilitate analysis of future workforce skills needs, the ESS collected from employers detailed descriptions of each occupation, together with the number of staff and vacancies for each position. These data were coded according to the International Standard Classification of Occupations (ISCO) at the 4-digit level and mapped to occupational skill level. Occupational analysis in this study focuses on a specific subset of occupations categorised as tourism characteristic occupations (TCOs), that is, occupations where most or all workers in that occupation are employed in T/H establishments. These are the occupations directly aligned to TVET and higher education qualifications in T/H. While the T/H sector routinely employs many other occupations (e.g., accountants, clerks, gardeners) the qualifications and skills required in these occupations are not unique to T/H.

The ASEAN Mutual Recognition Arrangement (MRA) on Tourism Professionals identifies 32 discrete job titles under six labour divisions as core to the T/H sector (these are listed in Annex B). From a skills development perspective, identifying trends in these specific occupations will help align and target training programmes to the needs of the T/H sector.

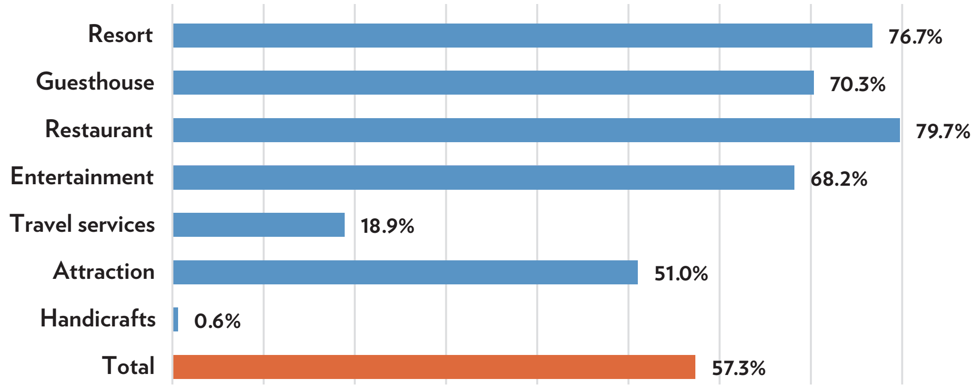
A total of 56 discreet occupations were identified by employers as relevant to their businesses. Of these, 13 were consistent with the MRA above and therefore categorised as TCOs. Estimated employment for each TCO, together with other significant occupations, is presented in figure 26. The full list of occupational employment is shown in Annex C.

Figure 26: Employment by tourism characteristic occupation



TCOs account for 23,300 of total staff employed at the time of the survey. These occupations represent 57% of the total workforce. The largest occupations are waiters/waitresses (5,700 staff) and cleaners/housekeepers (5,300 staff) followed by cooks (3,000) and hotel receptionists (2,400). Five other significant occupations accounted for a further 25% of total T/H employment. These include almost 3,000 handicraft workers in textile, leather and related products, (accounting for 58% of the handicraft sector), and 2,700 managing directors and chief executives distributed across all T/H sectors. All other occupations account for the remaining 18%, a further 7,400 workers. The share of employment in TCOs varied significantly by sector, from just 0.6% in handicrafts to 80% of all staff employed in restaurants (figure 27).

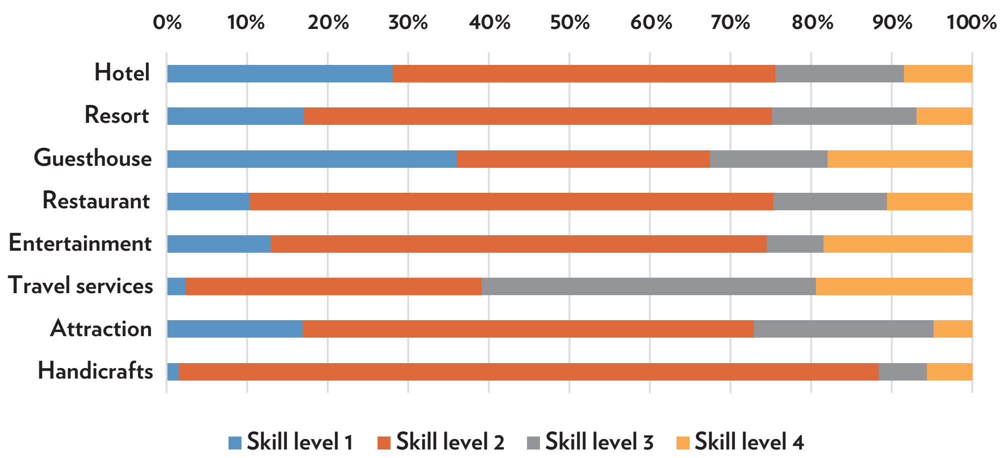
Figure 27: TCO employment share by sector



ISCO occupations are also classified by skill level. While the most important determinant of skill level is the nature of the tasks performed in a particular occupation, formal education and training requirements are feature in determining skill level. Skill level 1 occupations involve routine tasks and require low levels of educational attainment, e.g., cleaners; skill level 2 occupations include machinery operators, maintenance and repair, and clerical functions; skill level 3 occupations involve advanced technical knowledge and skills and include hotel managers and associate professionals; skill level 4 occupations typically require complex problem solving and decision making, these include general managers and professionals. Analysis of occupational demand by skill level is an important aid to T/H skill supply planning to help align graduates training is appropriately targeted by field of study and qualification level. The four ISCO skill levels are described in more detail in Annex B.

The sector with the highest occupational skill level is travel services with 62% of employment in skill level 3 or 4 jobs (figure 28). This does necessarily mean that the staff currently holding those jobs hold qualifications commensurate with the position. Handicrafts has the lowest proportion of high skill jobs with 89% of jobs at skill level 2.

Figure 28: Occupational employment by skill level and sector



4.5 Qualifications, skills and training

While only 6.7% of workers in the T/H sector hold tourism related qualifications (compared to just 3.1% in 2018) there has been a significant increase in the skills profile of the workforce since the 2018 ESS. The overall percentage of workers with qualifications is now 51.1%, up 20% points from 30.1% in 2018. Tourism qualifications were most prevalent in resorts and travel services (21% and 20% of staff with T/H qualifications respectively) and hotels (10% T/H qualified).

Over the three-year period, the illiteracy rate has fallen by 7% points from 49.3% to 42.0%. The illiteracy rate was highest in the handicrafts sector where almost 65% of workers were classified as being illiterate. Lao-owned businesses recorded illiteracy rates (45.4%) three times higher than foreign owned businesses (13.6%). Conversely, persons with T/H qualifications were three times more likely to find employment in a foreign owned business (15.4% of staff) compared to a Lao-owned businesses (5.6%).

Figure 29: Qualifications of staff by sector

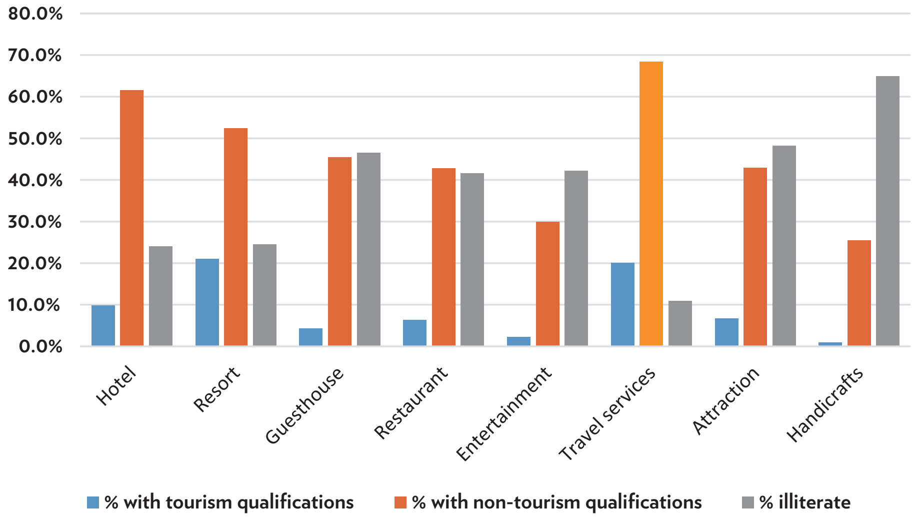
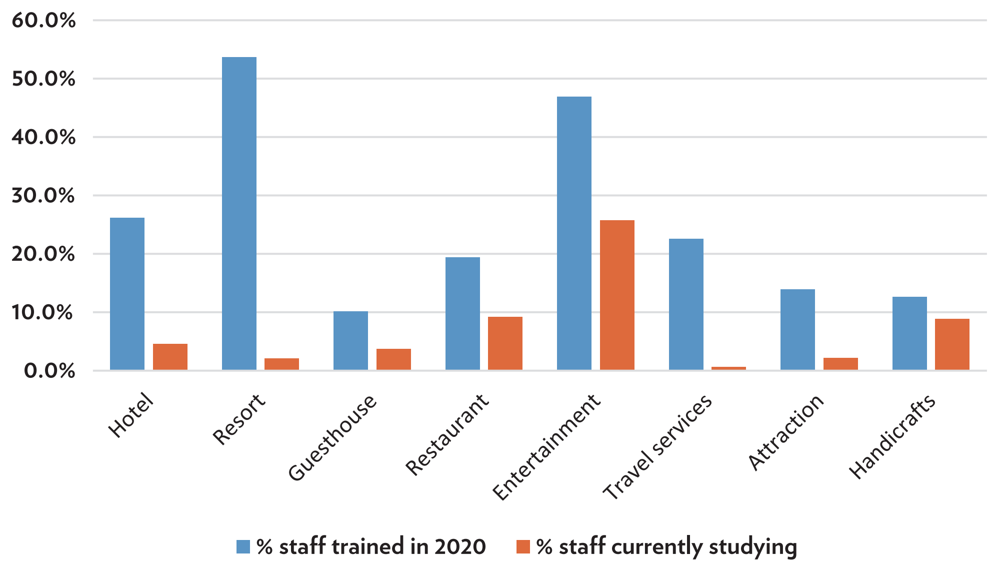


Table 13: Qualification and training rates

Sector	% staff trained in 2020	% staff currently studying	% with tourism qualifications	% with non-tourism qualifications	% illiterate/ no education
Hotel	26.1%	4.6%	9.9%	61%	24.0%
Resort	53.7%	2.1%	21.0%	52%	24.5%
Guesthouse	10.1%	3.7%	4.3%	45%	46.5%
Restaurant	19.4%	9.2%	6.4%	43%	41.6%
Entertainment	46.9%	25.7%	2.2%	30%	42.2%
Travel services	22.5%	0.6%	20.1%	68%	10.9%
Attraction	14.0%	2.2%	6.7%	43%	48.2%
Handicrafts	12.6%	8.8%	0.9%	25%	64.9%
Region					
Vientiane Capital	31.7%	12.5%	5.9%	57%	24.4%
Central	22.2%	5.1%	7.2%	38%	49.6%
North	16.0%	6.3%	5.2%	46%	42.4%
South	12.7%	2.5%	12.0%	26%	59.1%
Trading status					
Currently trading	17.3%	7.7%	6.1%	44%	42.3%
Temporarily closed	28.8%	5.4%	8.1%	45%	41.1%
Firm size					
Very large	25.8%	2.7%	10.5%	49%	37.9%
Large	47.2%	13.3%	11.5%	31%	43.9%
Medium	24.2%	11.2%	4.7%	40%	44.5%
Small	16.7%	6.3%	7.2%	48%	38.4%
Micro	18.6%	3.1%	7.2%	45%	44.2%
Business longevity					
Long term	21.1%	8.5%	7.1%	40%	44.0%
Established	19.6%	6.8%	6.8%	45%	41.5%
New	22.1%	6.6%	7.0%	44%	42.6%
Start-up	19.7%	5.5%	3.3%	57%	34.7%
Business ownership					
Lao	17.5%	7.4%	5.6%	42%	45.4%
Mixed	29.9%	5.0%	10.1%	54%	30.7%
Foreign	49.8%	4.7%	15.4%	66%	13.6%
Capacity utilisation					
High	32.4%	7.7%	11.0%	41%	40.1%
Moderate	19.8%	8.7%	4.9%	51%	35.2%
Low	26.0%	7.9%	5.5%	43%	44.0%
At risk	18.2%	7.2%	7.7%	42%	42.9%
Unsustainable	11.0%	1.4%	7.6%	44%	46.6%
Total %	**20.8%**	**7.0%**	**6.7%**	**44.4%**	**42.0%**
Total	**8,440**	**2,844**	**2,713**	**18,030**	**17,062**

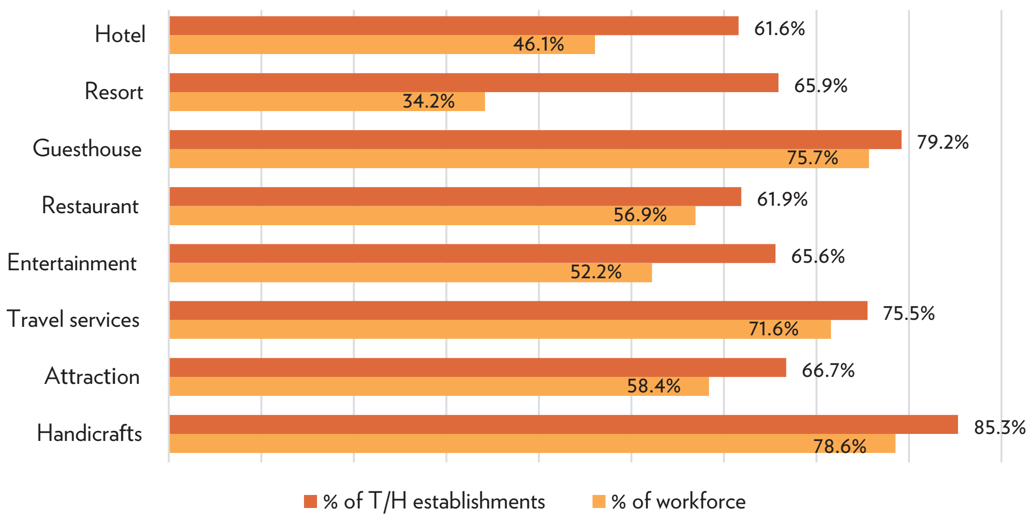
Around 7% of the workforce are currently studying. This rate was highest in the entertainment sector (26%) followed by restaurants (9%). This result is not surprising given that these subsectors typically exhibit higher levels of casual employment where, for example, students by day, will wait tables or perform in the evening.[16]

Figure 30: Staff training rates by sector



Staff training rates have fallen by around 8% points compared to the 2018 ESS with just 28% of surveyed firms reporting that they have trained staff in the past 12 months (36% in 2018) and just one-in-five (20.1%) of total staff receiving training during 2020. Staff training rates were highest in the resort and entertainment subsectors. Conversely, the sectors offering the least training were handicrafts and guesthouses. Enterprises who offered no training tended to be smaller firms as can be seen in figure 31. For example, the 61.6% of hotels who delivered no staff training in 2020, employ just 46.1% of the hotel workforce.

Figure 31: Tourism establishments who provided no staff training in 2020

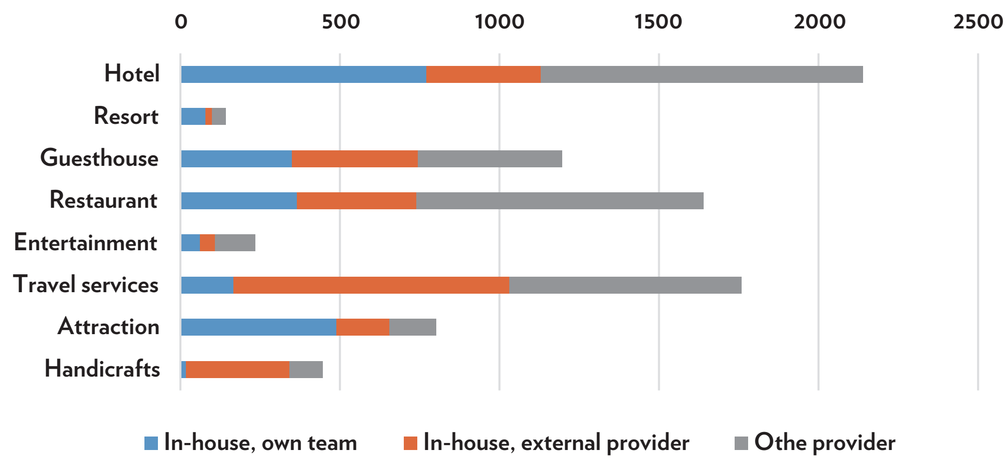


16 It should be noted that the survey did not collect information on what employees were studying.

More staff were trained in Vientiane Capital (31.7%) compared to other regions. Similarly, staff were more likely to receive training if they were employed in foreign owned enterprises (49.8%) and/or large businesses (47.2%). Of interest also is that staff training rates were reportedly higher in temporarily closed businesses (28.8%) compared to those currently trading (17.3%).

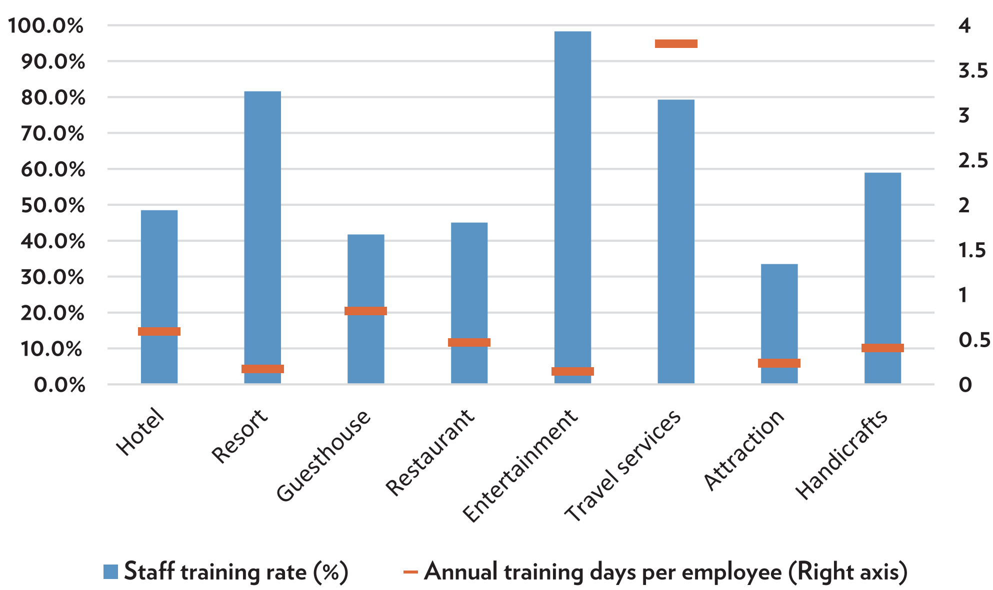
Of almost 10,000 total staff training days delivered by T/H enterprises during 2020, around 31% were delivered in-house using the firm's own team to conduct the training, 26% were delivered in-house using an external training provider, while the balance of training (43%) was conducted off-site at the external training providers premises (figure 32). Hotels provided the most training in absolute terms (2,100 days). However, this equates to approximately one-half a day per year for each employee (figure 33). This estimate excludes all firms who did not offer training.

Figure 32: Staff training days by sector and provider type



Entertainment establishments who did deliver training, reportedly provided training to 98% of their employees, however, the total training received by each employees averaged just two hours over the whole year. Travel services provided the highest per capita training rate at 3.8 days per worker per year.

Figure 33: Staff training rate* and training days per employee



*Excludes businesses providing no training.

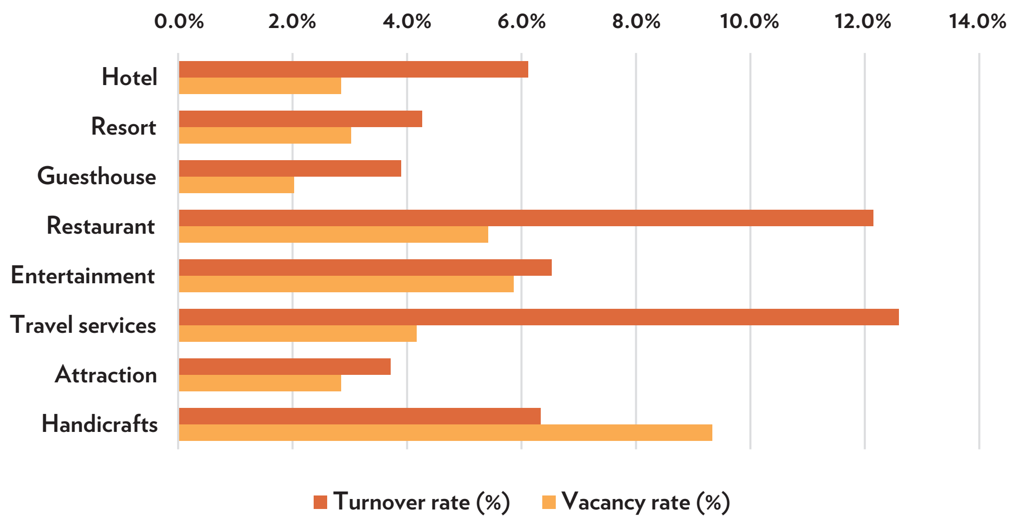
4.6 Turnover, vacancies, and recruitment

Table 14 presents staff turnover, vacancy, and planned recruitment activity for T/H establishments by sector, region, and firm characteristics.

Despite the COVID-19 lockdowns and temporary business closures, over a third of businesses (36%) reported no staff turnover at all during 2020. Total staff turnover at 6.8% (2,752) is considered low compared to industry averages. Turnover rates were highest for travel services and restaurants, and much higher in Vientiane Capital compared to the other regions. Start-up businesses also recorded a high turnover rate.

Low vacancy rates and limited planned recruitment activity demonstrates the depressed state of the T/H sector in Lao PDR and general lack of business confidence for the near-term. Only 8% of businesses have current vacancies on their books. In total, the weighted number of vacancies at the time of the survey was 1,778 across all T/H sectors. With over 4,850 in-scope businesses in the sector, this represents an average of just over one vacancy for every three businesses.

Figure 34: Staff turnover and vacancy rates by sector



The sector listing the highest number of vacancies was handicrafts (478) with almost all of these in two occupations, comprising handicraft workers in wood and basketry, and textiles and leather. The top 10 vacancies by occupation are presented in table 15 below. These 10 occupations account for 86% of all current vacancies. The full list of vacancies is presented in Annex C.

Expected recruitment rates were also found to be quite low with only one-in-ten firms planning to recruit new staff over the next 12 months. The weighted total recruitment over the next 12 months is just under 4,000 positions. At these levels of staff turnover and new recruitment, it will take at over five years for total T/H employment to return to pre-COVID-19 levels. Handicrafts recorded the highest anticipated recruitment rate (29.3%) with this result due to a small number of larger handicraft factories planning to re-engage workers laid off during COVID-19 downsizing. Most recruitment activity is expected in Vientiane Capital and in firms exhibiting high capacity utilisation rates.

Table 14: Staff turnover, vacancies, and recruitment

Sector	Staff turnover	Turnover rate (%)	Current vacancies	Vacancy rate (%)	Recruitment next 12 months	Recruitment rate (%)
Hotel	411	6.1%	192	2.8%	825	12.2%
Resort	54	4.3%	39	3.0%	25	2.0%
Guesthouse	235	3.9%	122	2.0%	247	4.1%
Restaurant	989	12.1%	441	5.4%	432	5.3%
Entertainment	228	6.5%	204	5.9%	397	11.4%
Travel services	206	12.6%	68	4.2%	321	19.7%
Attraction	305	3.7%	234	2.8%	219	2.7%
Handicrafts	325	6.3%	478	9.3%	1,501	29.3%
Region						
Vientiane Capital	1,439	15.1%	981	10.3%	3,184	33.3%
Central	596	6.2%	350	3.7%	314	3.3%
North	471	2.9%	260	1.6%	291	1.8%
South	246	4.8%	188	3.7%	179	3.5%
Trading status						
Currently trading	1,790	6.3%	1,524	5.4%	3,195	11.2%
Temporarily closed	962	7.9%	254	2.1%	773	6.3%
Firm size						
Very large	99	4.6%	40	1.8%	397	18.2%
Large	25	2.9%	30	3.5%	226	26.2%
Medium	729	5.5%	740	5.6%	1,867	14.2%
Small	1,193	8.6%	547	3.9%	685	4.9%
Micro	706	6.7%	422	4.0%	794	7.5%
Business longevity						
Long term	241	2.9%	386	4.7%	422	5.1%
Established	848	5.5%	825	5.4%	2,317	15.1%
New	1,262	8.8%	549	3.8%	984	6.9%
Start up	401	15.1%	18	0.7%	245	9.2%
Business ownership						
Lao	2,511	7.3%	1,558	4.5%	3,554	10.3%
Mixed	126	3.7%	93	2.7%	129	3.8%
Foreign	115	4.1%	127	4.6%	284	10.2%
Capacity utilisation						
High	125	5.0%	341	13.7%	1,107	44.6%
Moderate	632	7.8%	209	2.6%	830	10.3%
Low	938	7.8%	429	3.6%	873	7.3%
At risk	777	6.0%	678	5.3%	736	5.7%
Unsustainable	280	5.4%	122	2.3%	422	8.1%
Total	**2,752**	**6.8%**	**1,778**	**4.4%**	**3,968**	**9.8%**

NB. Weighted totals may not add due to rounding: 1, Excludes 'not stated'.

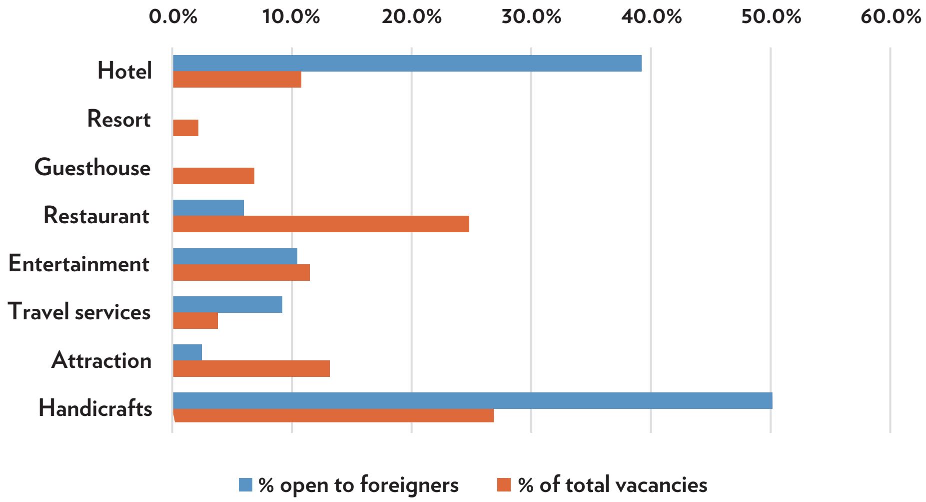
Table 15: Top ten occupational vacancies

4-digit ISCO	Occupation	Current vacancies	Vacancy to employment ratio
5131	Waiters	429	7.5%
7317	Handicraft workers in wood and basketry	244	61.0%
7318	Handicraft workers in textile and leather	199	6.7%
5113	Travel guides	157	13.1%
5120	Cooks	120	4.0%
9112	Cleaners / housekeepers	90	1.6%
4224	Hotel receptionists	87	3.7%
5414	Security guards	76	4.3%
9412	Kitchen helpers	72	14.8%
2431	Advertising and marketing professionals	62	14.8%
	Top ten vacancies	**1,536**	**6.5%**
	All other occupations	242	2.0%
	Total vacancies	**1,778**	**4.9%**

4.6.1 Recruitment practices

While all vacancies identified were open to Lao residents, 21% of vacancies were also open to foreigners. Handicrafts (at 50%) and hotels (at 39%) were far more receptive of foreign applicants for vacant posts than other sectors. There was, however, no indication from employers in these sectors that they either preferred or had in place any specific recruitment practices to attract foreign workers. No current vacancies in resorts or guesthouses are open to foreign workers.

Figure 35: Vacancies open to foreigners by sector



Generally, a larger proportion of higher skilled vacancies are open to foreigners (see figure 36) and this is often linked to specific qualifications required by applicants (figure 37). While only 4% of vacancies are for skill level 3 occupations, 42% of these vacancies are open to foreign workers. For all current vacancies at skill level 3, employers have specified minimum education requirements of degree or higher (76%), diploma/high diploma (20%), and certificate level qualifications (4%).

Figure 36: Vacancies open to foreigners by skill level

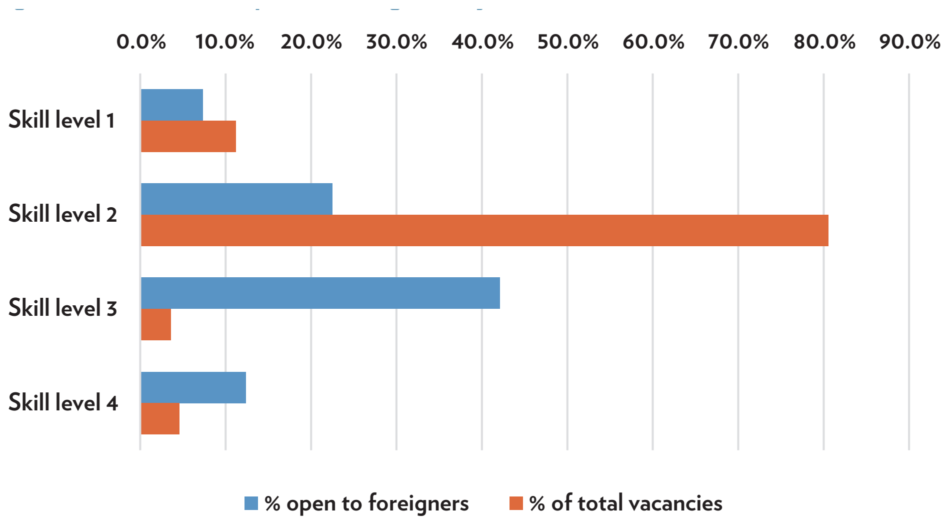
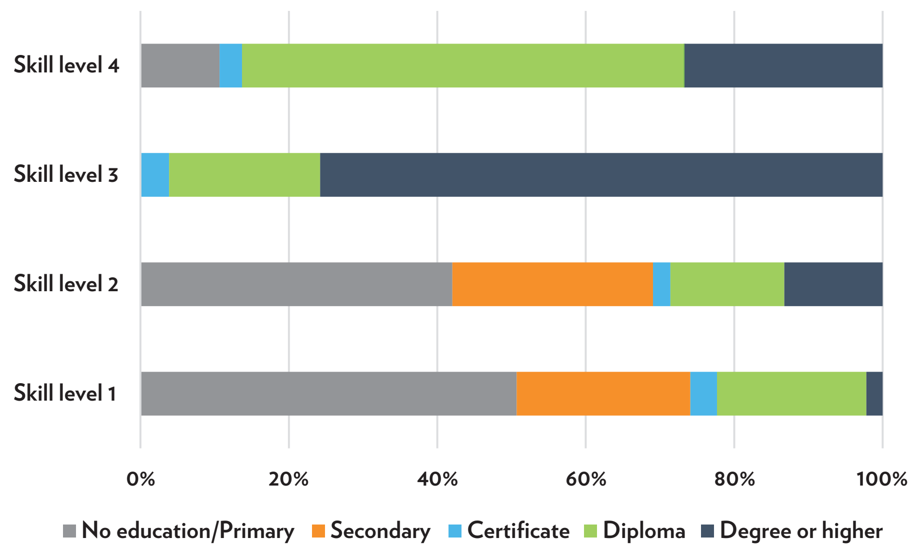


Figure 37: Occupational vacancies by skill level and education required



4.6.2 Hard-to-fill vacancies

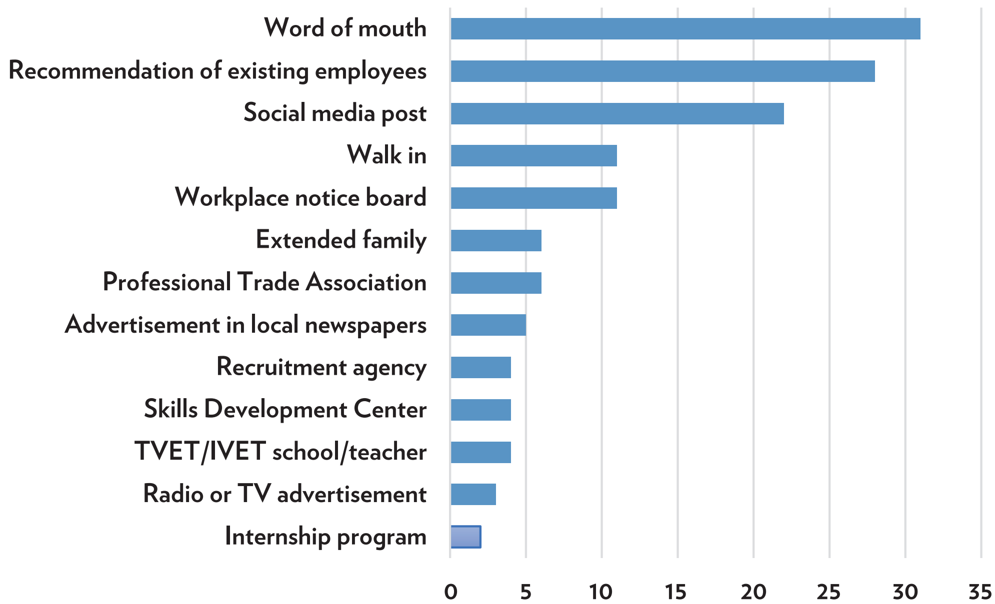
Of the 1,323 firms surveyed, just 110 firms (8.3%) reported having vacancies. Of these, 63 firms reported that their vacancies were hard-to-fill, accounting for almost two-in-five (39.1%) of current vacancies. The largest number of vacancies reportedly hard-to-fill are handicraft workers in textiles and leather, travel guides and waiters (see table 16). However, most firms citing hard-to-fill vacancies continue to rely on informal methods such as word-of-mouth or waiting for walk-in job applicants to fill these vacancies.

Of the 63 firms who reported hard-to-fill vacancies only 11 adopted more formal means of recruitment, such as newspaper advertisements or registering a vacancy with an employment agency (figure 38). This has implications for human resources (HR) practices within these firms, and the sector more broadly, if they are to attract appropriately skilled labour.

Table 16: Hard-to-fill vacancies

4-digit ISCO	Occupation	Total vacancies	Number hard-to-fill	% hard-to-fill
7318	Handicraft workers in textile and leather	199	170	85.0%
5113	Travel guides	157	128	81.7%
5131	Waiters	430	109	25.3%
5414	Security guards	76	50	65.8%
4224	Hotel receptionists	87	40	46.3%
9112	Cleaners / housekeepers	85	24	27.9%
7317	Handicraft workers in wood and basketry	244	23	9.4%
5120	Cooks	120	22	18.4%
5223	Shop sales assistants	37	20	54.9%
All other vacancies		342	110	32.1%
Total vacancies		**1,778**	**696**	**39.1%**

Figure 38: Recruitment strategies of employers with hard-to-fill vacancies



4.6.3 Graduate supply data

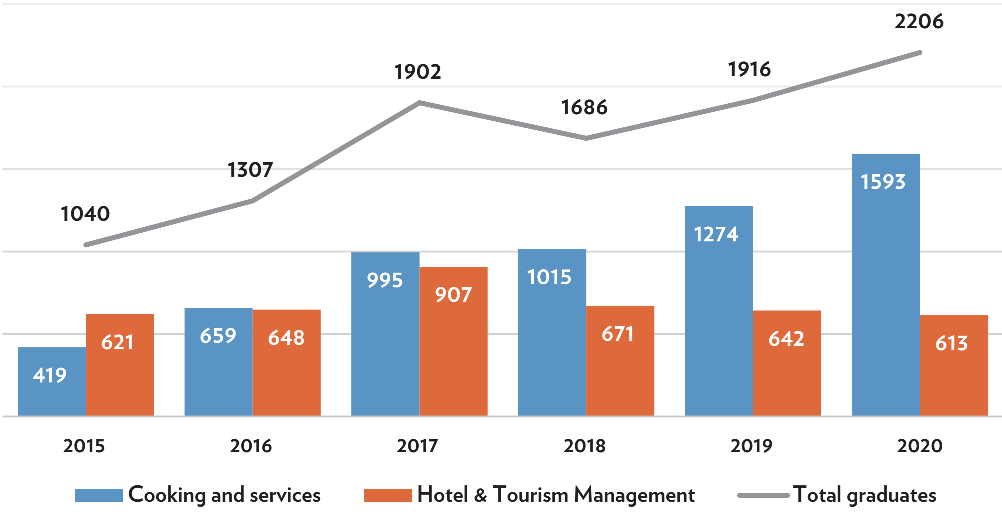
As noted previously, the qualification profile of the T/H workforce has increased markedly since the 2018 ESS, with over 51% of the workforce now holding formal qualifications. The proportion with T/H specific qualifications doubled from 3.1% in 2018 to 6.7% in 2021. This achievement is reflected in the graduate supply data which show both a trend increase in the supply of T/H graduates and better alignment between occupational demand and the qualifications required to meet that demand.

When compared with graduate supply data, the number of graduates each year specifically aligned to TCOs appear to exceed the combined levels of current vacancy and expected recruitment over the next 12 months. There is a risk therefore, that without appropriate improvements in HR practices of T/H businesses, many of these graduates will not find a position using the qualification and skills obtained.

Figures 39 and 40 presents T/H graduate supply data for 2015 to 2020 by graduate programme and qualification level respectively. The solid trend growth in graduates show graduate numbers more than doubling over the five-year period, from 1,040 to 2,206. The increase is evident in cooking and services programmes such that the share of these graduates, relative to hotel and tourism management graduates, is now more consistent with the pattern of T/H occupational employment, i.e., there are more than twice the number of cooking and services jobs in T/H than hotel and tourism management jobs.

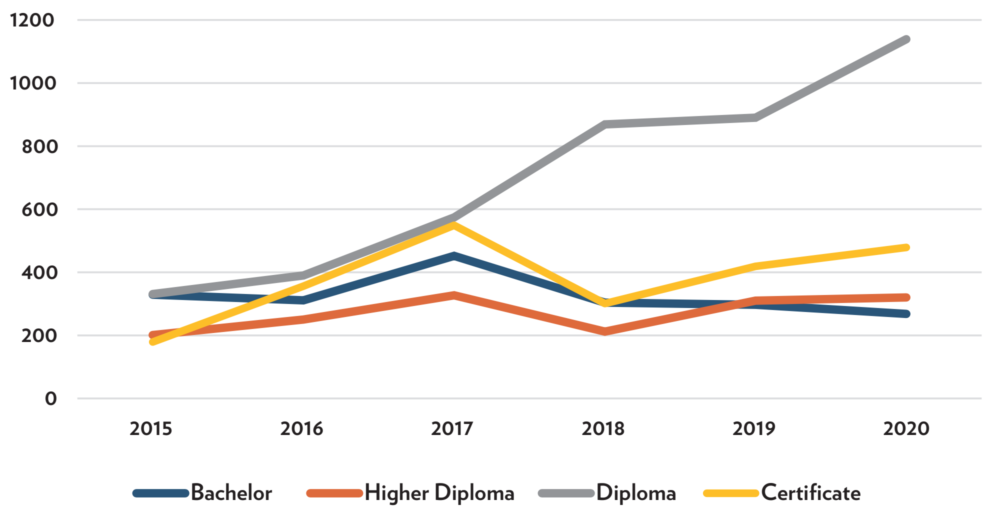
The trend increase in total qualifications is driven entirely by an increase in diploma graduates which is an appropriate qualification for competent performance of most skill level 2 and 3 vacancies in the T/H sector.

Figure 39: Supply of tourism and hospitality graduates by programme, 2015 to 2020



Source: MoES, EMIS, Unpublished data. Excludes short course training

Figure 40: Supply of tourism and hospitality graduates by qualification, 2015 to 2020



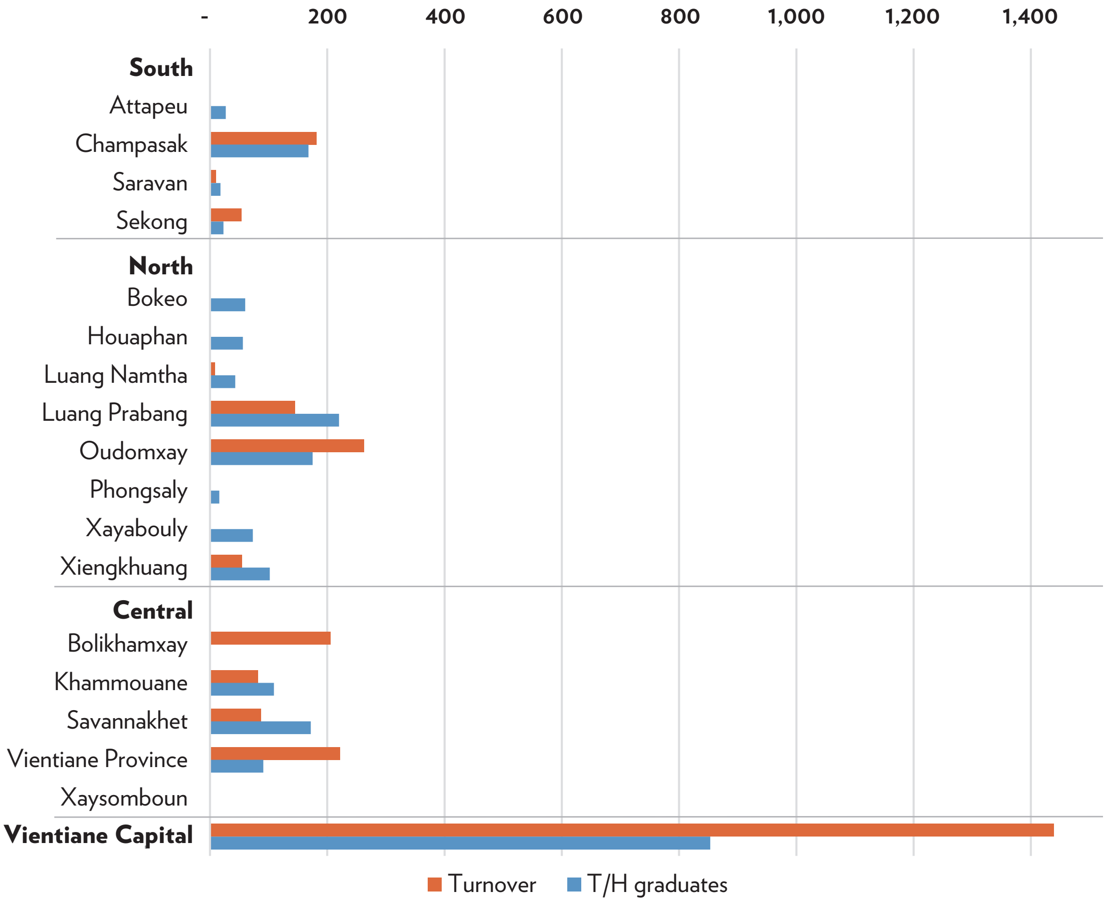
Source: MoES, EMIS, Unpublished data

Females comprised 91% of cooking and services graduates and 66% of hotel and tourism management graduates in 2020. Further detailed tables of graduate supply by province, programmes and sex are presented in Annex E.

Figure 41 provides a geographical distribution of available graduates relative to total staff turnover reported by province. Total turnover gives an indication of the number of job openings that will be filled each year assuming employers wish to maintain their current staff levels. While not all job openings require qualifications the ratio of available graduates to job openings is helpful in assessments of supply-demand imbalances. For example, to assess where employers may find it more difficult to recruit qualified staff (insufficient graduates) or where graduates are unlikely to find job placements in their locality.

The largest supply-side imbalances (insufficient graduates relative to job openings) are apparent in Vientiane Capital, Vientiane Province, and Bolikhamxay (which currently has no graduates with T/H qualifications). Conversely, graduate numbers in most north region provinces exceed job openings and would be required to relocate to a new province in order to find employment using their T/H skills.

Figure 41: T/H turnover and training graduates in 2020 by province



5 Sectoral Snapshots

The figures and tables provided in this section provide a snapshot of key characteristics regarding employment composition and the top ten occupations for each T/H sector.

Each snapshot provides a visual representation of the relative contribution of the sector to total T/H employment in Lao PDR; the share employment in temporarily closed businesses; a measure of concentration of employment within the top ten occupations in the sector; and an indicator of the relative skill level of employment in the sector.

Workforce composition characteristics are displayed, relative to total T/H employment. These include: relative shares of female; disabled and disadvantaged; and illiterate workers; and the proportion of qualified workers employed with tourism and non-tourism related qualifications.

The top ten employing occupations within each sector have been tabulated together with vacancy rates and proposed recruitment intentions over the next 12 months.

5.1 Hotels

Hotels currently employ 6,745 persons, the 3rd largest T/H sector, representing

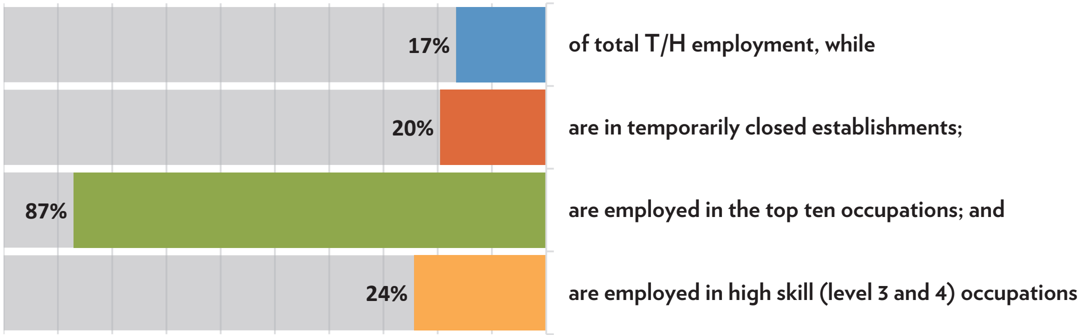


Figure 42: Hotel workforce characteristics

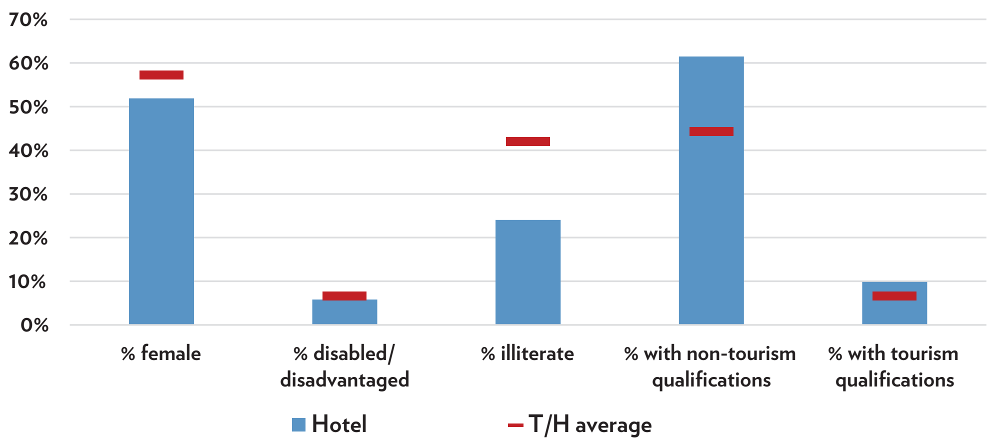


Table 17: Hotels, top ten occupations

Occupation	Total employed	Current vacancies	Recruitment next 12 month	Vacancy rate %	Recruitment rate %
Cleaners/housekeepers	1,664	32	311	1.9%	18.7%
Hotel receptionists	1,024	52	115	5.1%	11.3%
Waiters	760	31	103	4.1%	13.6%
Hotel managers	659	6	7	1.0%	1.1%
Security guards	570	17	102	3.1%	17.8%
Cooks	325	10	15	3.0%	4.5%
Managing directors and chief executives	267		2	0.0%	0.9%
Conference and event planners	223	2	50	1.1%	22.2%
Accountants	194		4	0.0%	1.9%
Building and related electricians	188	5	25	2.5%	13.2%
Total top ten occupations	**5,874**	**156**	**734**	**2.7%**	**12.5%**
All other occupations	868	36	92	4.1%	10.6%

5.2 Resorts

Resorts currently employ 1,277 persons, the smallest T/H sector, representing

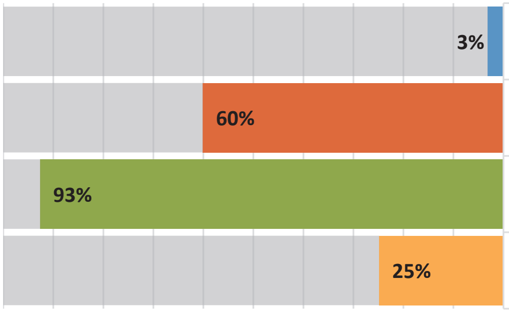


Figure 43: Resort workforce characteristics

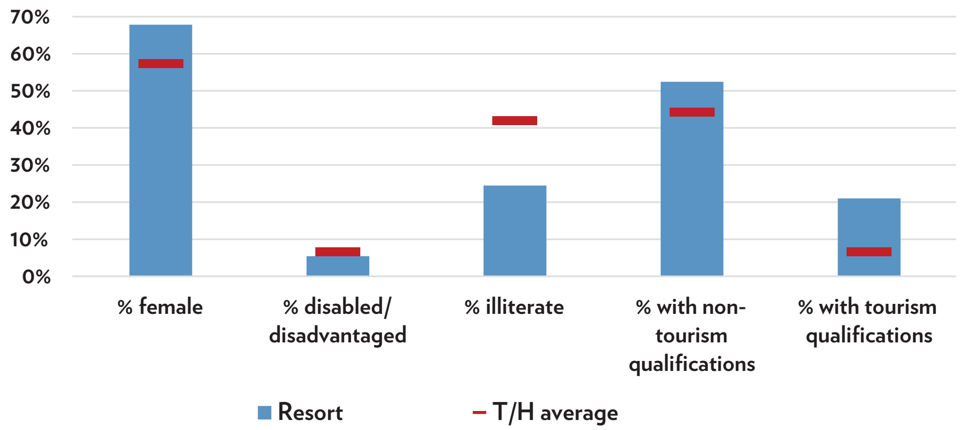
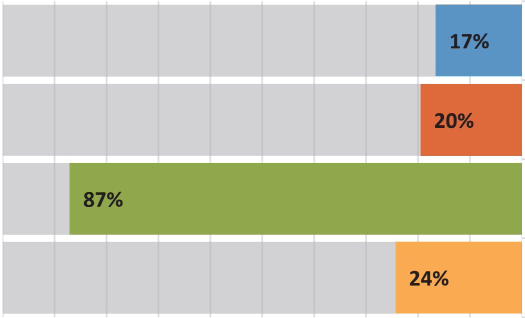


Table 18: Resort, top ten occupations

Occupation	Total employed	Current vacancies	Recruitment next 12 month	Vacancy rate %	Recruitment rate %
Receptionists	345	6	4	1.8%	1.1%
Hotel managers	218	1	1	0.6%	0.5%
Cleaners/housekeepers	169	6	3	3.6%	2.1%
Cooks	131	2	3	1.5%	2.2%
Waiters	83	8	11	10.2%	13.5%
Personnel clerks	67			0.0%	0.0%
Managing directors and chief executives	66			0.0%	0.0%
Security guards	51		1	0.0%	2.9%
Garden and horticultural labourers	27	1		5.4%	0.0%
Garden, horticultural and nursery growers	25	2		7.9%	0.0%
Total top ten occupations	**1,182**	**28**	**24**	**2.3%**	**2.0%**
All other occupations	94	11	1	11.6%	1.5%

5.3 Guesthouses

Guesthouses currently employ 6,033 persons, the 4th largest T/H sector, representing



of total T/H employment, while

are in temporarily closed establishments;

are employed in the top ten occupations; and

are employed in high skill (level 3 and 4) occupation

Figure 44: Guesthouse workforce characteristics

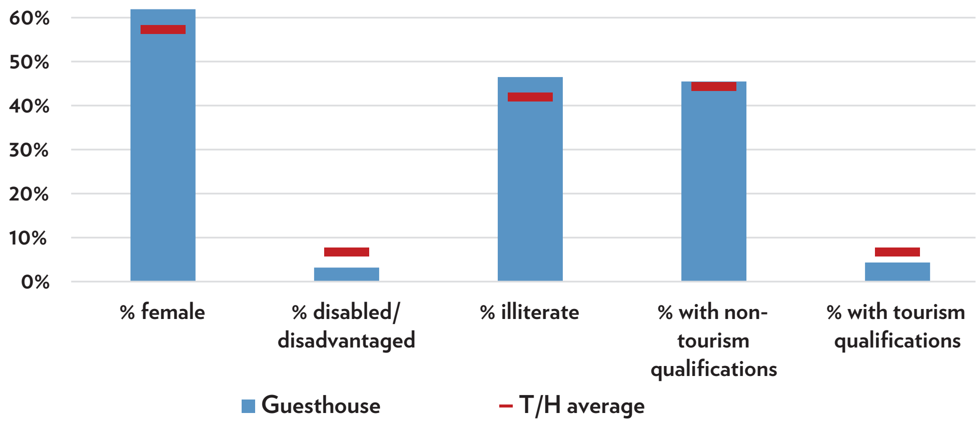
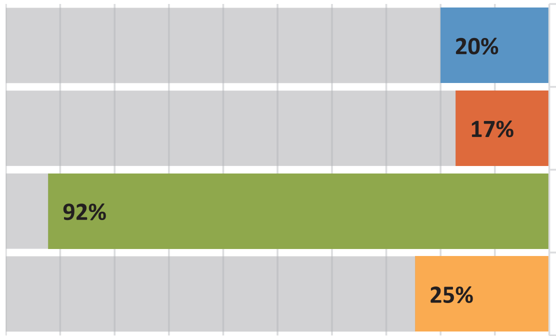


Table 19: Guesthouse, top ten occupations

Occupation	Total employed	Current vacancies	Recruitment next 12 month	Vacancy rate %	Recruitment rate %
Cleaners/housekeepers	2,130	23	84	1.1%	3.9%
Managing directors and chief executives	1,009		9	0.0%	0.9%
Hotel receptionists	969	29	43	3.0%	4.4%
Hotel managers	844	10	20	1.2%	2.3%
Security guards	518	16	14	3.0%	2.7%
Accounting and bookkeeping clerks	140		7	0.0%	5.0%
Waiters	118	38	44	32.2%	37.3%
Cooks	118		14	0.0%	12.1%
Accountants	51		4	0.0%	8.5%
Kitchen helpers	29		7	0.0%	22.5%
Total top ten occupations	**5,927**	**116**	**245**	**2.0%**	**4.1%**
All other occupations	106	6	2	5.8%	2.1%

5.4 Restaurants

Restaurants currently employ 8,140 persons, the 2nd largest T/H sector, representing



of total T/H employment, while

are in temporarily closed establishments;

are employed in the top ten occupations; and

are employed in high skill (level 3 and 4) occupations

Figure 45 Restaurant workforce characteristics

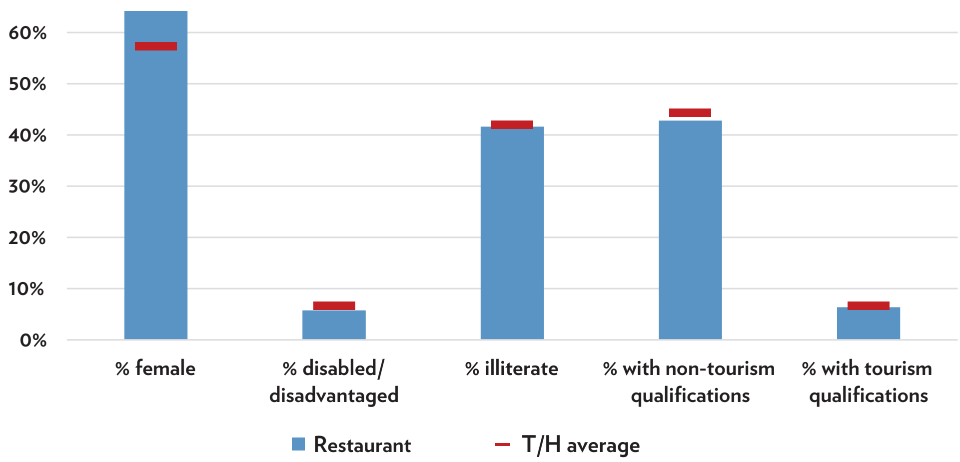
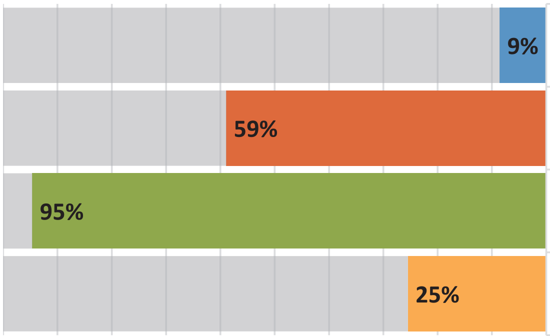


Table 20: Restaurant, top ten occupations

Occupation	Total employed	Current vacancies	Recruitment next 12 month	Vacancy rate %	Recruitment rate %
Waiters	2,840	216	229	7.6%	8.1%
Cooks	1,463	107	41	7.3%	2.8%
Restaurant managers	717	8	42	1.1%	5.9%
Managing directors and chief executives	646			0.0%	0.0%
Cleaners/housekeepers	520	12	25	2.4%	4.8%
Chefs	387		12	0.0%	3.2%
Kitchen helpers	277	53	35	19.3%	12.5%
Bartenders	253			0.0%	0.0%
Accounting and bookkeeping clerks	225		11	0.0%	4.9%
Receptionists (general)	169	8		4.5%	0.0%
Total top ten occupations	**7,498**	**404**	**395**	**5.4%**	**5.3%**
All other occupations	634	37	37	5.9%	5.9%

5.5 Entertainment

Entertainment establishments currently employ 3,491 persons, the 6th largest T/H sector, representing



of total T/H employment, while

are in temporarily closed establishments;

are employed in the top ten occupations; and

are employed in high skill (level 3 and 4) occupations

Figure 46: Entertainment workforce characteristics

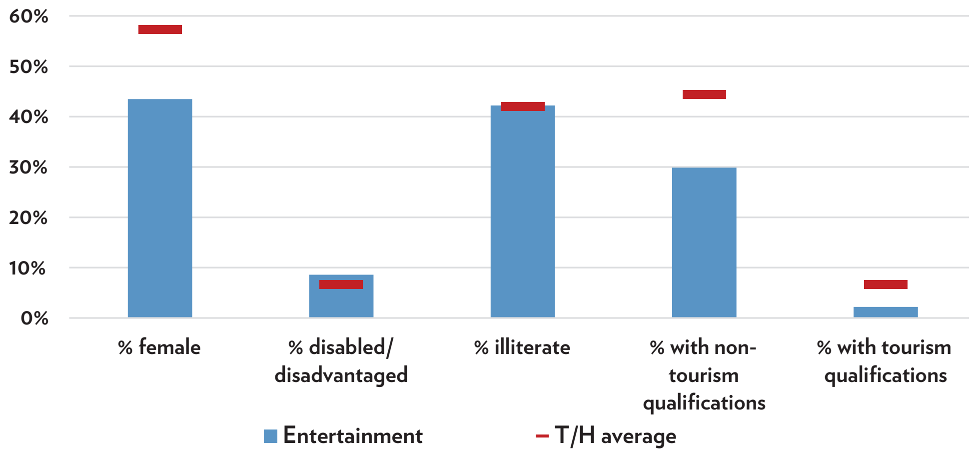


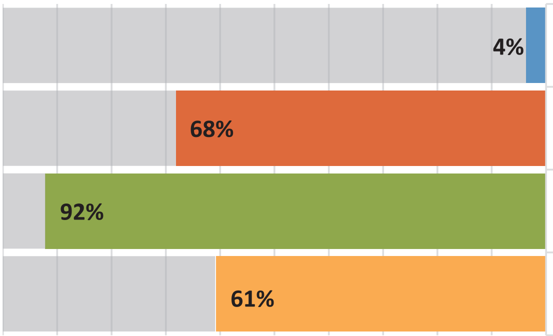
Table 21: Entertainment, top ten occupations

Occupation	Total employed	Current vacancies	Recruitment next 12 month	Vacancy rate %	Recruitment rate %
Waiters	1,340	136	324	10.2%	24.2%
Cooks	468	1	1	0.3%	0.3%
Cleaners/housekeepers	305	1	1	0.5%	0.5%
Musicians, singers and composers	301			0.0%	0.0%
Restaurant managers	227	8	4	3.7%	1.9%
Security guards	168	37	36	22.3%	21.2%
Managing directors and chief executives	158		13	0.0%	8.5%
Advertising and marketing professionals	146			0.0%	0.0%
Elementary workers n.e.c	117	1	1	1.3%	1.3%
Accounting and bookkeeping clerks	74	4	4	4.8%	4.8%
Total top ten occupations	**3,303**	**190**	**385**	**5.8%**	**11.7%**
All other occupations	187	14	11	7.6%	6.0%

n.e.c = 'not elsewhere classified'

5.6 Travel services

Travel services currently employ 1,632 persons, the 2nd smallest T/H sector, representing



of total T/H employment, while

are in temporarily closed establishments;

are employed in the top ten occupations; and

are employed in high skill (level 3 and 4) occupations

Figure 47: Travel services workforce characteristics

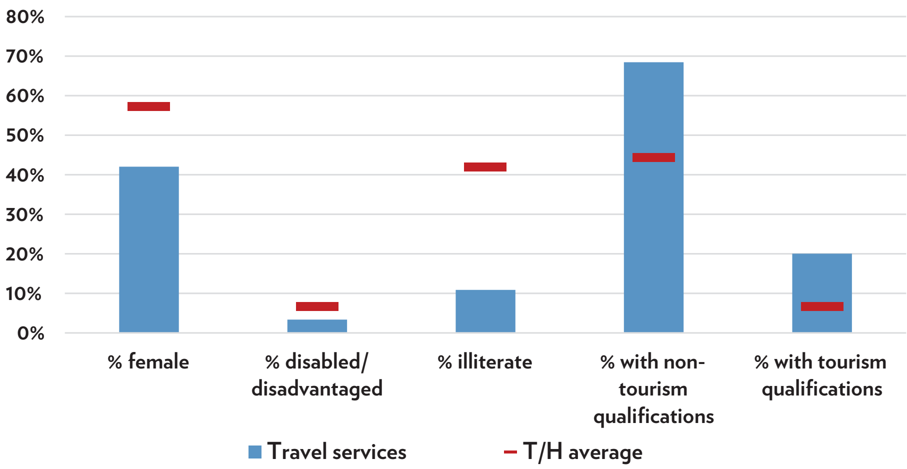


Table 22: Travel services, top ten occupations

Occupation	Total employed	Current vacancies	Recruitment next 12 month	Vacancy rate %	Recruitment rate %
Services managers n.e.c	558	10	10	1.8%	1.8%
Travel guides	179	20	130	11.2%	72.9%
Car, taxi and van drivers	149	7	70	4.4%	46.9%
Managing directors and chief executives	133			0.0%	0.0%
Advertising and marketing professionals	123	10	60	8.1%	48.9%
Accounting and bookkeeping clerks	113	8	20	7.0%	17.7%
Travel consultants and clerks	76	13		17.5%	0.0%
Accountants	60			0.0%	0.0%
Business services agents n.e.c	55		25	0.0%	45.8%
Pet groomers and animal care workers	54			0.0%	0.0%
Total top ten occupations	**1,500**	**68**	**316**	**4.5%**	**21.0%**
All other occupations	131	-	5	0.0%	3.8%

n.e.c = 'not elsewhere classified'

5.7 Attractions

Attractions currently employ 8,214 persons, the largest T/H sector, representing

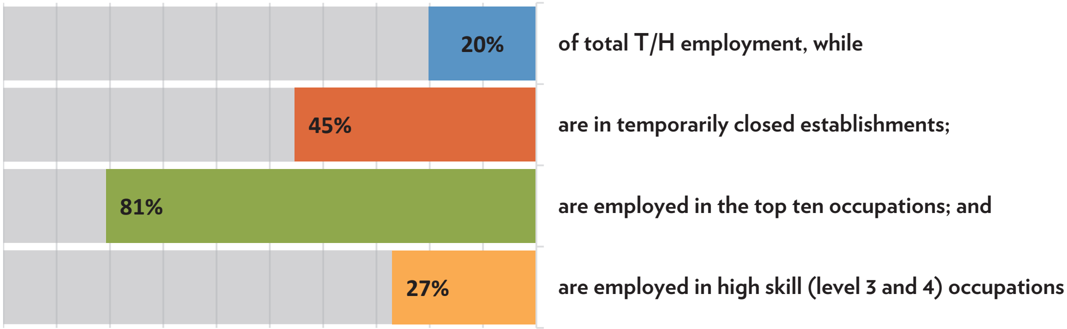


Figure 48: Attraction workforce characteristics

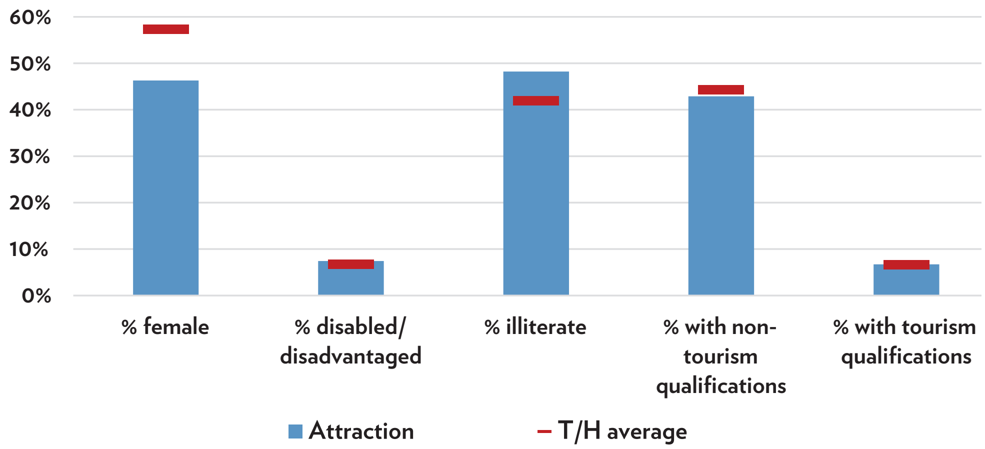


Table 23: Attractions, top ten occupations

Occupation	Total employed	Current vacancies	Recruitment next 12 month	Vacancy rate %	Recruitment rate %
Sports, recreation and cultural centre managers	1,561	6		0.4%	0.0%
Shop sales assistants	1,020	6	12	0.6%	1.1%
Travel guides	998	137	74	13.7%	7.5%
Elementary workers n.e.c	612	15	9	2.4%	1.4%
Waiters	547		46	0.0%	8.3%
Cooks	460		25	0.0%	5.5%
Cleaners/housekeepers	459	10	4	2.2%	1.0%
Accounting and bookkeeping clerks	401	6		1.5%	0.0%
Security guards	295	6		2.0%	0.0%
Garden and horticultural labourers	258			0.0%	0.0%
Total top ten occupations	**6,611**	**185**	**170**	**2.8%**	**2.6%**
All other occupations	1,575	49	49	3.1%	3.1%

5.8 Handicrafts

Handicrafts currently employ 5,122 persons, the 5th largest T/H sector, representing

of total T/H employment, while

are in temporarily closed establishments;

are employed in the top ten occupations; and

are employed in high skill (level 3 and 4) occupations

Figure 49: Handicraft workforce characteristics

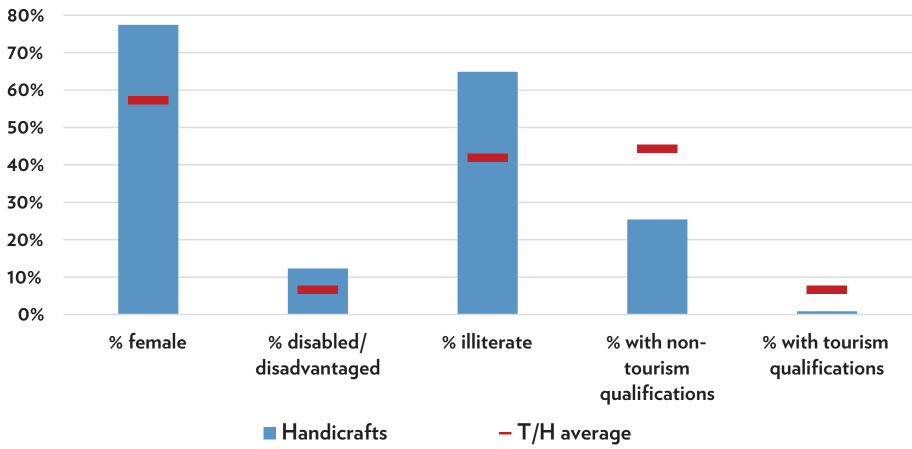


Table 24: Handicrafts, top ten occupations

Occupation	Total employed	Current vacancies	Recruitment next 12 month	Vacancy rate %	Recruitment rate %
Handicraft workers in textile & leather	2,945	199	229	6.8%	7.8%
Handicraft workers in wood & basketry	400	244	1,044	61.1%	261.0%
Sewing, embroidery and related workers	390		11	0.0%	2.8%
Retail and wholesale trade managers	303			0.0%	0.0%
Shop sales assistants	296	31	70	10.4%	23.7%
Managing directors and chief executives	238			0.0%	0.0%
Jewellery and precious-metal workers	155		111	0.0%	71.5%
Potters and related workers	138			0.0%	0.0%
Accounting and bookkeeping clerks	90		4	0.0%	4.1%
Odd job persons	41			0.0%	0.0%
Total top ten occupations	**4,995**	**474**	**1,468**	**9.5%**	**29.4%**
All other occupations	127	4	33	2.9%	26.1%

6 Employment Projections and Future Skills Demand

A key challenge for policy makers and training providers is to ensure appropriately qualified and skilled workers are available to meet projected future demand. And while there is a considerable lead-time associated with the production of new graduates on the supply-side, demand for skills in the T/H sector can be extremely volatile as evidenced by the current turmoil induced by the COVID-19 pandemic. Detailed occupational employment demand projections in the Lao-context are even more problematic given the lack of historic time series data.

This section presents a simplified model of projected labour demand for the T/H sector and models the implications of an approach to increase the skills profile of the sector. As there are no consistent time series data for T/H employment, detailed projections at the occupational level are not possible[17]. Aggregate T/H employment projections to 2026, have been developed using a simplified econometric model of gross domestic product (GDP) and GDP per capita as the primary determinants of employment growth[18]. The modelling approach is an update of the model developed for the 2018 ESS projections[19]. In essence, this modelling uses a 'top-down' approach to ensure internally consistent estimates; firstly, of total employment in Lao PDR which in turn impacts employment in services of which employment in T/H is a subset. The model directly incorporates differential equations to take account of structural adjustment, e.g., services sector's increased share of total employment through time.

T/H employment is likewise increasing its share of service sector employment over time. To obtain a measure of the rate of change over time reliance has been placed on a 2009 study by the former Lao National Tourism Administration (LNTA) which estimated that the T/H sector accounted for 17,000 direct jobs20. This was considered to be the most comparable historical estimate of T/H employment available.

Figure 50 shows the regression model projection for T/H employment to 2026 incorporating alternative growth scenarios. The compound average growth (CAG) line incorporates all the point-in-time sample estimates of T/H employment available from the 2009 LNTA study and both the 2018 and 2021 ESS. The point estimates for 2019 and 2020 are derived from the month-by-month data for 2020 collected in during the current survey and therefore exhibits the volatility associated with the COVID-19 pandemic. The CAG scenario assumes future growth will occur at the compound average rate of growth between 2009 and 2021. Under this scenario, aggregate T/H employment will reach 65,400 persons by 2026.

The GDP regression line directly incorporates the impact of the current economic contraction and consensus forecasts of future economic growth from ADB and WB and is considered the most likely trajectory for T/H employment. Under this scenario aggregate T/H employment will rebound to pre-COVID levels of 57,000 by 2023 – during which time many displaced workers could be re-employed – reaching 67,600 persons by 2026. Implicit in this forecast is a return to 'normal' international travel levels in 2021-22 with the growth trajectory moderating from 2023. The mid-point scenario is derived using a simple 'naive' linear trend (59,500 by 2026). The non-linear trend presents a lower bound and is included as a plausible outcome (just 49,200 persons employed by 2026) should international travel bans be extended, further impacting business confidence and investment in the sector.

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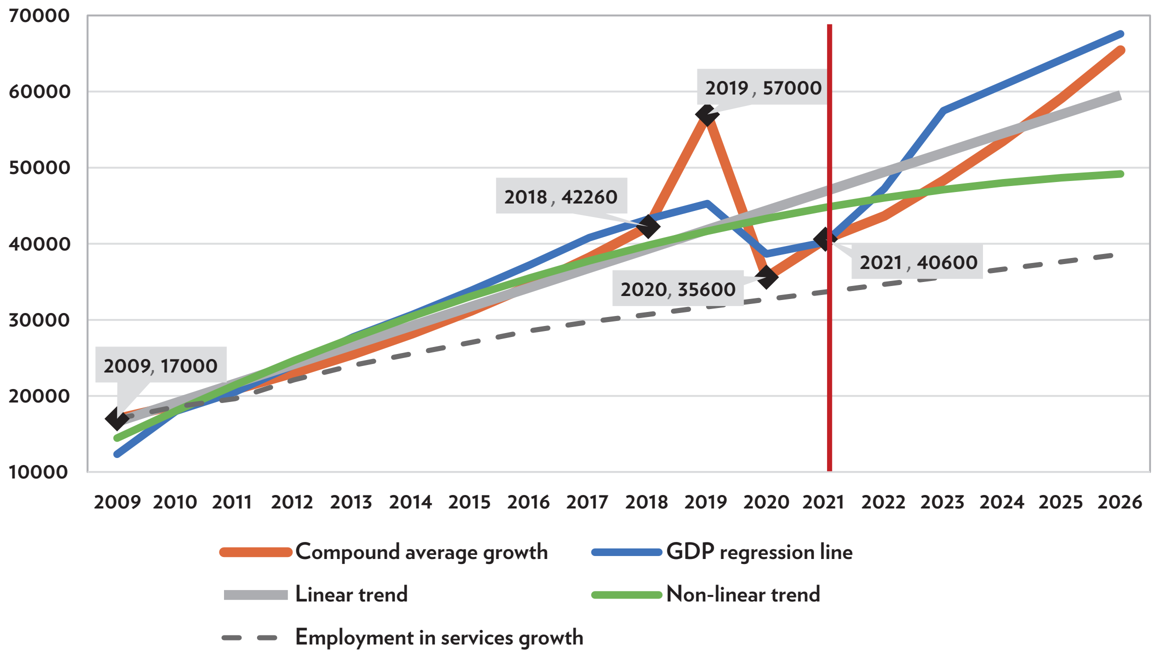
17 The prime objective of occupational level forecasts is to assess changes in skill needs as the occupational mix adjusts to structural change. Without historic data on employment by occupation there are no determinants to include in a modelling approach to capture structural change.

18 A necessary qualifying assumption of projected tourism employment presented here is that the current underlying occupation structure will remain stable over the projection horizon.

19 For a detailed description of the model methodology and assumptions see MoES, 2018. Tourism and Hospitality Enterprise Survey of Employment and Skills in Lao PDR: Research Findings and Employment Projections 2018-2023. Skills for Tourism Project (LAO/029). July. Vientiane.

20 Tourism Employment and Education in Lao PDR, Summary of Research 2009. Lao National Tourism Administration (LNTA).

Figure 50: Historic and projected T/H employment, 2009 to 2026



The dashed 'Employment in services growth' line is included for illustrative purposes to highlight the superior growth in tourism relative to other services. Had T/H growth since 2009 matched that of the total services sector, current employment would stand at just 33,600, reaching 38,600 by 2026.

From the projected series, average annual change is calculated over the projection horizon as a basis for determining annual labour demand. To the annual growth estimate we add an estimate of net replacement factor in staff turnover. Growth plus net replacement equals total demand. Assuming the occupation mix to be relatively stable going forward, we then estimate the share of total labour demand that is most directly aligned with T/H qualifications, i.e., the share of employment in TCOs. In the absence of further time series information on turnover rates and changes to the occupation mix over an historical period, it is necessary to assume the observed rates from the ESS will remain constant going forward, i.e., a TCO share of employment of 57.3% and annual staff turnover rate of 6.8%. From these simplifying assumptions we derive the likely range of total labour demand to 2026 under each scenario, as shown in table 27.

Estimates of required graduate supply to meet this demand makes the additional assumption that all TCO vacancies will require a T/H related qualification. While this will not necessarily be the case, a quality supply of graduates will ensure a continued increase in the skills profile of the sector leading to gains in regional and international competitiveness of Lao PDR as a tourism destination. A final assumption relates to the level of potential labour supply available from T/H graduates. Not all graduates intend to work in the field in which they have studied and represent a 'leakage' from available labour supply. Estimates of graduate intent are typically derived from graduate tracer studies, not yet consistently undertaken in Lao PDR. For illustrative purposes, therefore, this rate is assumed to be 10%. This rate is applied to total demand to provide an estimate of the total graduate supply required to meet industry demand.

Given these assumptions, graduate supply will need to be between 539 under the (least likely) low-growth scenario to 3,837 under the high-growth CAG scenario. Under the GDP regression scenario – the most likely trajectory – 2,289 graduates per year would be required. As reported in section 4.6.3 above, graduate supply had increased to 2,206 by 2020, only marginally short of the level required to meet projected demand.

Table 25: Estimates of annual training demand

Scenario	Average Annual growth[1]	Net replacement	Total demand	TCO share of total demand	Required graduate supply
GDP regression	3,400	231	3,631	2,081	2,289
GAG scenario	5,700	388	6,088	3,488	3,837
Linear trend	2,500	170	2,670	1,530	1,683
Non-linear regression	800	54	854	490	539

[1] Projected average annual growth from 2023 to 2026 is used to allow graduates displaced during COVID-19 downsizing to be reabsorbed into the labour market.

7 Conclusions

The second ESS was conducted in the wake of the COVID-19 pandemic which has presented some unique problems in both data collection and in the comparability of the results with the 2018 survey. The survey firm, who undertook the field work, is to be commended on the excellent job they have done in tracking down and eliciting responses from firms who were temporarily closed.

Necessary changes to scope and coverage, e.g., to incorporate temporarily closed businesses, limit, in some respects, direct comparability of results across the two survey years. It should be noted, however, this is limited only to weighted measures, e.g., total employment, total vacancies, etc. Proportional comparisons between the survey groups across the two years are not impacted by the changes in scope and coverage, e.g., the percentage of firms with job vacancies, average occupancy rates, averaged size of business, etc.

The sample frame used for the study shows considerable variation in the underlying populations in some subsectors compared to 2018. These changes are generally attributed to better administrative records being available through MICT. Consequently, many existing businesses in 2018 in the guesthouse, restaurant, and attractions subsectors were 'invisible' to the survey weighting process, leading to an underestimation of the weighted results. While the converse was true for the handicraft sector, (i.e., it was overestimated previously) the net effect of the sample frame adjustments suggests total employment in T/H reported in the 2018 ESS will have been underestimated.

While sample variability (and therefore standard errors) has increased in the current sample due to the inclusion of temporarily closed businesses, overall, the sample results are robust and provide a reliable and accurate estimate of total T/H employment in Lao PDR as at June 2021. Furthermore, the employment-by-month data, collected for 2020, provides a valid basis for measuring the direct impact of COVID-19 on employment numbers during this period.

Detailed information collected by occupation show that the occupational mix within each subsector has remained relatively stable over the three-year period. In the absence of more accurate time series estimates of employment by occupation in Lao PDR, the stability in these results can be relied upon as an aid to future workforce planning.

The survey results confirm clear evidence of skill deepening across all T/H sectors since 2018. Overall, the proportion of workers in T/H has increased by 21 percentage points to be 51% of all workers in the sector. Those with T/H related qualifications has doubled from 3.4% to 6.7%. The illiteracy rate has fallen by 7% and the number of disadvantaged/disabled workers has fallen commensurately by 2%.

This finding is substantiated by growth trends in the graduate supply data for students completing T/H related qualifications. Combined, these results demonstrate a much closer alignment between skill supply and skills demand compared with three years ago.

In the current economic climate, the employment projections presented are subject to greater variability. On balance, however, the modelled scenario based on GDP and GDP per capita growth presents the most likely growth trajectory for employment demand. Should the trend in T/H graduate numbers continue, the training supply system is already on track to meet future demand. Ongoing collaboration, however, between training providers and employers, is essential to ensure the right mix of graduates in terms of field of study and level of qualification.

To improve training and skills development planning further, it is recommended that the ESS, if repeated, also include a separate questionnaire – to be completed by staff members of selected enterprises – to provide an additional perspective on skill needs and their utilisation within the workplace. Additionally, the use of tracer studies of T/H graduates to monitor their transitions into employment would also provide valuable assistance in the planning and delivery of vocational training.

Annex A: Sample Stratification and Weights

Table A1: Post-enumeration Revised Sample Frame and Population Weights

Revised sample frame - In-scope businesses by sector and province								
	Hotels	Resorts	Guest houses	Restau-rants	Entertain-ment	Travel agents	Attractions	Handi-crafts
Vientiane Capital	206	18	176	99	37	281	22	59
Bolikhamxay	37	4	64	50	11	6	13	18
Khammouane	27	10	96	87	1	0	56	31
Savannakhet	45	1	118	80	5	6	21	17
Vientiane Prov-ince	33	27	168	79	3	28	26	0
Xaysomboun	2	0	58	42	0	0	16	10
Total Central	144	41	503	337	20	40	132	76
Bokeo	14	5	31	27	10	10	12	0
Houaphan	11	0	31	30	0	0	48	36
Luang Namtha	10	2	105	76	9	8	68	6
Luang Prabang	54	10	138	32	25	50	85	36
Oudomxay	22	5	101	86	84	5	36	60
Phongsaly	8	0	19	7	6	2	12	5
Xayabouly	6	2	152	102	18	15	8	37
Xiengkhuang	18	3	29	72	0	10	46	18
Total North	142	27	605	432	152	100	314	198
Attapeu	20	1	20	13	12	0	18	10
Champasak	65	10	151	90	8	18	55	14
Saravan	8	1	31	15	2	2	30	20
Sekong	9	2	34	11	11	0	7	4
Total South	101	14	236	129	33	20	110	48
Total Lao PDR	**594**	**99**	**1,521**	**998**	**241**	**441**	**579**	**381**
Population weights by sector and region								
Vientiane Capital	2.479	1.460	2.177	12.404	18.250	5.013	4.375	3.688
Central	1.430	1.331	4.747	7.663	1.778	3.983	6.287	5.052
North	1.234	1.260	6.113	11.079	4.224	3.323	6.828	3.675
South	1.139	1.000	2.687	6.165	1.492	2.926	5.826	2.288

Annex B: Occupational Coding and Skill Level

Discrete occupations identified as core to the T/H sector fall under six labor divisions and 32 job titles as shown in Figure B1 below.

Figure B1: Tourism job classifications

32 Job Titles - Six Labour Divisions

HOTEL SERVICES				TRAVEL SERVICES	
Front Office	House Keeping	Food Production	Food and Beverage Service	Travel Agencies	Tour Operation
Front Office Manager	Executive Housekeeper	Executive Chef	F&B Director	General Manager	Product Manager
Front Office Supervisor	Laundry Manager	Demi Chef	F&B Outlet Manager	Assistant General Manager	Sales & Marketing Manager
Receptionist	Floor Supervisor	Commis Chef	Head Waiter	Senior Travel Consultant	Credit Manager
Telephone Operator	Laundry Attendant	Chef de Partle	Bartender	Travel Consultant	Ticketing Manager
Bell Boy	Room Attendant	Commis Pastry	Waiter		Tour Manager
	Public Area Cleaner	Baker			
		Butcher			

Source: ASEAN MRA on Tourism Professionals Handbook

Analysis in this report relies on occupation data coded to ISCO. Occupations identified which closely align to those listed in figure B1, deemed tourism characteristic occupations are listed below.

Table B1: Tourism characteristic occupations

2-digit ISCO	Occupation group	4-Digit ISCO	Occupation
14	Hospitality, Retail and Other Services Managers	1411 1412 1431	Hotel / Resort / Guesthouse Manager Restaurant Manager / Pub, Bar, Nightclub Manager Sports, recreation, and cultural centre managers
34	Legal, Social, Cultural and Related Associate Professionals	3434	Chef
42	Customer Services Clerks	4221 4224	Travel Consultant and Clerk Hotel / Resort / Guesthouse Receptionist
51	Personal Services Workers	5113 5120 5131 5132 5151	Travel Guide Cook Waiter / Waitress Bartender Cleaning and Housekeeping Supervisor
91	Cleaners and Helpers	9112 9412	Cleaner/Housekeeper Kitchen Helper
96	Refuse Workers and Other Elementary Workers	9621	Luggage Porter

ISCO occupations are also classified by skill level. While the most important determinant of skill level is the nature of the tasks performed in a particular occupation, formal education and training requirements are often an important component of the measurement of skill level. The four skill levels defined within the ISCO classification are summarized below. Table B2 presents a mapping of the ISCO major occupational groups by skill level.

Skill Level 1 occupations typically involve the performance of simple and routine physical or manual tasks. For competent performance in some occupations at Skill Level 1, completion of primary education or the first stage of basic education may be required. Occupations include cleaners, garden labourers, and kitchen assistants.

Skill Level 2 occupations typically involve the performance of tasks such as operating machinery and electronic equipment; driving vehicles; maintenance and repair of electrical and mechanical equipment; and manipulation, ordering and storage of information. The knowledge and skills required for competent performance in occupations at Skill Level 2 are generally obtained through completion of the first stage of secondary education. Occupations classified at Skill Level 2 include receptionists, accounts clerks, handicraft workers, and sales assistants.

Skill Level 3 occupations typically involve the performance of complex technical and practical tasks that require an extensive body of factual, technical, and procedural knowledge in a specialized field. The knowledge and skills required at Skill Level 3 are usually obtained as the result of study at a higher educational institution for a period of 1-3 years following completion of secondary education. Occupations include shop managers, medical laboratory technicians, legal secretaries, commercial sales representatives, diagnostic medical radiographers, computer support technicians, and broadcasting and recording technicians.

Skill Level 4 occupations typically involve the performance of tasks that require complex problem-solving, decision-making and creativity based on an extensive body of theoretical and factual knowledge in a specialised field. The knowledge and skills required at Skill Level 4 are usually obtained as the result of study at a higher educational institution for a period of 3-6 years leading to the award of a first degree or higher qualification. Occupations include sales and marketing managers, civil engineers, secondary school teachers, medical practitioners, musicians, operating theatre nurses and computer systems analysts.

Table B2: Mapping of ISCO major groups to skill levels

1-digit ISCO	Occupation Major Group	Skill level
1	Managers	3 + 4
2	Professionals	4
3	Technicians and Associate Professionals	3
4	Clerical Support Workers	2
5	Services and Sales Workers	2
6	Skilled Agricultural, Forestry and Fishery Workers	2
7	Craft and Related Trades Workers	2
8	Plant and Machine Operators and Assemblers	2
9	Elementary Occupations	1
0	Armed Forces Occupations	1 + 2 + 4

Annex C: Occupation Employment, 4-digit ISCO

Table C1: Employment, qualifications, vacancies and future recruitment by 4-digit ISCO

4-digit ISCO	Occupation	Total employed	% total employed	% with T/H qualifications	Vacancy to employment ratio %	Recruitment to employment ratio %
1120	Managing directors and chief executives	2,721	6.7%	8.8%	0.0%	0.9%
1211	Finance managers	8	0.0%	0.0%	112.5%	112.5%
1212	Human resource managers	31	0.1%	3.2%	0.0%	6.5%
1221	Sales and marketing managers	15	0.0%	13.3%	26.7%	26.7%
1411	Hotel managers	1,740	4.3%	12.1%	1.0%	1.6%
1412	Restaurant managers	977	2.4%	12.2%	1.6%	4.7%
1420	Retail and wholesale trade managers	303	0.7%	3.0%	0.0%	0.0%
1431	Sports, recreation, and cultural centre managers	1,565	3.9%	7.5%	0.4%	0.0%
1439	Services managers not elsewhere classified	558	1.4%	22.9%	1.8%	1.8%
2211	Generalist medical practitioners	1	0.0%	0.0%	0.0%	0.0%
2411	Accountants	524	1.3%	2.9%	0.0%	1.9%
2431	Advertising and marketing professionals	420	1.0%	11.2%	14.8%	21.2%
2621	Archivists and curators	82	0.2%	0.0%	0.0%	0.0%
2652	Musicians, singers and composers	443	1.1%	0.0%	1.8%	2.7%
3152	Ships' deck officers and pilots	95	0.2%	0.0%	0.0%	0.0%
3255	Physiotherapy technicians and assistants	61	0.2%	0.0%	1.6%	1.6%
3332	Conference and event planners	224	0.6%	3.1%	0.9%	22.3%
3339	Business services agents not elsewhere classified	57	0.1%	8.8%	3.5%	43.9%
3343	Administrative and executive secretaries	138	0.3%	14.5%	0.0%	5.1%
3433	Gallery, museum and library technicians	102	0.3%	3.9%	3.9%	7.8%
3434	Chefs	549	1.4%	10.0%	0.4%	11.7%
3511	Information and communications technology operations technicians	10	0.0%	0.0%	10.0%	20.0%
4110	General office clerks	78	0.2%	1.3%	0.0%	0.0%
4221	Travel consultants and clerks	94	0.2%	8.5%	13.8%	0.0%
4224	Hotel receptionists	2,355	5.8%	18.3%	3.7%	6.9%
4226	Receptionists (general)	405	1.0%	4.9%	2.0%	6.2%

4311	Accounting and bookkeeping clerks	1,201	3.0%	7.5%	1.4%	3.9%
4321	Stock clerks	27	0.1%	0.0%	0.0%	0.0%
4416	Personnel clerks	115	0.3%	20.0%	0.0%	0.9%
5113	Travel guides	1,197	2.9%	18.7%	13.1%	17.1%
5120	Cooks	2,989	7.4%	7.7%	4.0%	3.6%
5131	Waiters	5,688	14.0%	4.7%	7.5%	13.3%
5132	Bartenders	271	0.7%	0.4%	1.8%	1.8%
5151	Cleaning and housekeeping supervisors in offices, hotels, and other establishments	68	0.2%	1.5%	0.0%	0.0%
5164	Pet groomers and animal care workers	156	0.4%	0.0%	0.0%	0.0%
5223	Shop sales assistants	1316	3.2%	2.1%	2.8%	6.2%
5230	Cashiers and ticket clerks	192	0.5%	0.0%	7.3%	8.3%
5246	Food service counter attendants	1	0.0%	0.0%	0.0%	0.0%
5414	Security guards	1,771	4.4%	1.0%	4.3%	8.6%
6113	Gardeners, horticultural and nursery growers	273	0.7%	0.0%	1.1%	0.0%
7213	Sheet-metal workers	15	0.0%	0.0%	0.0%	0.0%
7215	Riggers and cable splicers	60	0.1%	0.0%	0.0%	0.0%
7313	Jewellery and precious-metal workers	155	0.4%	0.0%	0.0%	71.6%
7314	Potters and related workers	138	0.3%	0.0%	0.0%	0.0%
7317	Handicraft workers in wood, basketry and related materials	400	1.0%	0.0%	61.0%	261.0%
7318	Handicraft workers in textile, leather and related materials	2,957	7.3%	0.0%	6.7%	7.7%
7411	Building and related electricians	258	0.6%	0.0%	4.3%	12.0%
7533	Sewing, embroidery and related workers	390	1.0%	0.0%	0.0%	2.8%
8322	Car, taxi and van drivers	334	0.8%	0.9%	3.0%	26.3%
9112	Cleaners and helpers in offices, hotels and other establishments	5,310	13.1%	3.2%	1.6%	8.1%
9121	Hand launderers and pressers	44	vvvv	0.0%	11.4%	0.0%
9212	Livestock farm labourers	15	0.0%	0.0%	0.0%	0.0%
9214	Garden and horticultural labourers	415	1.0%	0.0%	1.0%	0.0%
9412	Kitchen helpers	488	1.2%	6.8%	14.8%	10.5%
9622	Odd job persons	52	0.1%	0.0%	0.0%	0.0%
9629	Elementary workers not elsewhere classified	762	1.9%	3.4%	2.1%	3.0%
Total %			**100.0%**	**6.3%**	**4.4%**	**9.8%**
Total		**40,612**		**2,558**	**1,778**	**3,968**

Annex D: Provincial Employment

Table D1: Characteristics of T/H employment by province

	Total employed	Currently trading	Temporarily closed	% of total T/H employment	% female	% with T/H qualifications
Vientiane Capital	9,549	7,442	2,107	23.5%	48.8%	5.9%
Phongsaly	193		193	0.5%	69.1%	0.0%
Luang Namtha	1,015	272	744	2.5%	51.9%	1.5%
Oudomxay	2,756	1,423	1,333	6.8%	55.6%	5.8%
Bokeo	862	71	791	2.1%	62.7%	8.6%
Luang Prabang	7,183	3,940	3,243	17.7%	52.1%	5.4%
Houaphan	1,815	1,802	13	4.5%	88.5%	4.5%
Xayabouly	1,185	705	480	2.9%	68.8%	4.8%
Xiengkhuang	1,410	1,373	38	3.5%	69.2%	5.3%
Vientiane Province	3,474	2,224	1,250	8.5%	57.5%	8.7%
Bolikhamxay	1,258	1,133	125	3.1%	58.7%	10.9%
Khammouane	1,753	1,471	281	4.3%	56.8%	11.0%
Savannakhet	2,552	2,246	307	6.3%	60.2%	2.0%
Saravan	326	320	5	0.8%	72.2%	8.1%
Sekong	356	229	127	0.9%	57.8%	11.4%
Champasak	3,288	2,185	1,103	8.1%	55.9%	10.5%
Attapeu	1,127	1,053	74	2.8%	67.3%	17.5%
Xaysomboun	549	524	25	1.4%	82.7%	2.3%
Total	**40,651**	**28,413**	**12,237**	**100.0%**	**57.3%**	**6.7%**

**Weighted estimates at the provincial level may be subject to high relative standard errors. Estimates in this table are indicative only and should be used with caution.*

Annex E: Tourism and Hospitality Graduate Data

Table E1: Providers of T/H related education and training programmes in 2020

	Institution	2020 T/H graduates
Universities	Champasak University	35
	Souphanouvong University, Luang Prabang	56
	University of Savannakhet	61
	National University of Laos	116
Colleges	Lao International College	28
	Vientiane Professional Development College	142
	Khammouane TVET College	109
	Savannakhet TVET College	111
	Luang Prabang TVET College	164
	Champasak TVET College	131
	Vientiane Province Technical College	91
	Pakpasak Technical College	359
	Bolikhamxay TVET College#	-
	Vocational Education Development Institute	34
Schools	Bokeo TVET School	60
	Attapeu TVET School	27
	Saravan IVET School	18
	Sekong IVET School	23
	Phongsaly IVET School	16
	Xayabouly IVET School	73
	Xiengkhuang IVET School	102
	Oudomxay IVET School	107
	Houaphan IVET School	56
	Luang Namtha IVET School	43
Skills Development Centers (SDC)	Vientiane Skills Development Center	55
	Savannakhet Skills Development Center	2
	Oudomxay Skills Development Center	68
	Lao - Korea Skills Development Institute	112
	Lao Women's Union Training Center	7

 # First enrolment of T/H diploma in 2019 with first intake to graduate in 2021.

Table E2: Tourism and hospitality graduates by programme and province: 2015 to 2020

Province	2015	2016	2017	2018	2019	2020
Hotel and tourism management						
Champasak	46	97	410	90	78	68
Khammouane	9	12	32	27	42	25
Luang Prabang	97	79	83	133	77	110
Oudomxay						9
Saravan						3
Savannakhet	60	53	53	70	48	61
Savannakhet	-	-	-	26	37	23
Vientiane Capital	373	352	283	301	337	300
Vientiane Province	36	55	46	24	23	14
Total hotel and tourism management	**621**	**648**	**907**	**671**	**642**	**613**
% female	**57.6%**	**61.4%**	**68.2%**	**65.4%**	**73.4%**	**66.4%**
Cooking and services						
Attapeu	6	38	30	13	34	27
Bokeo	28	4	24	18	30	60
Champasak	44	64	153	99	127	100
Houaphan	6	18	28	44	35	56
Khammouane	2	13	16	23		84
Luang Namtha	3	7	34	36	43	43
Luang Prabang	31	28	114	82	132	110
Oudomxay	10	8	45	94	112	166
Phongsaly	20	12	5	10	10	16
Saravan	17	13	15	14	13	15
Savannakhet	8	7	16	22	44	88
Sekong	39	38	47	27	36	23
Vientiane Capital	142	265	291	395	460	553
Vientiane Province	7	51	59	39	94	77
Xayabouly	26	51	48	64	70	73
Xiengkhuang	30	42	70	35	34	102
Total cooking and services	**419**	**659**	**995**	**1,015**	**1,274**	**1,593**
% female	**88.3%**	**90.4%**	**93.3%**	**92.6%**	**91.2%**	**91.0%**
Total T/H graduates	**1,040**	**1,307**	**1,902**	**1,686**	**1,916**	**2,206**
% female	**70.0%**	**76.1%**	**81.3%**	**81.8%**	**85.2%**	**84.1%**

Source: EMIS, MoES, unpublished data, and EDC calculations based on information received directly from training providers. Supplementary data has not yet been verified by MoES. Excludes short course training (less than 3 months).

Annex F: Survey Questionnaire

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Agency for Development and Cooperation SDC

LUXEMBOURG AID & DEVELOPMENT

SKILLS FOR TOURISM PROJECT • LAO/029

Skills for Tourism

Tourism and Hospitality Enterprise Survey of Employment and Skills

This survey is being conducted by Enterprise and Development Consultants (EDC) on behalf of the Government of Lao PDR and the Luxembourg Agency for Development Cooperation

For office use only

Enterprise: ____________ Enumerator ID ☐☐	Questionnaire Number: ☐☐☐ Allocated Sample ID ☐☐☐☐	
Data checker: ____________	Attempt 1	Interview Date: D D M M Y Y Y Y ☐☐☐☐☐☐☐☐ Interview period: Start: H H ☐☐ : M M ☐☐; End: H H ☐☐ : M M ☐☐
Date of data entry D D M M Y Y Y Y ☐☐☐☐☐☐☐☐	Attempt 2	Interview Date: D D M M Y Y Y Y ☐☐☐☐☐☐☐☐ Interview period: Start: H H ☐☐ : M M ☐☐; End: H H ☐☐ : M M ☐☐
Response code: ☐ Codes : 1. Completed 2. Partially completed 3. Refused 4. No contact 5. Business closed 6. Within sector – out of scope 7. Other sector – out of scope	Location : Prov Code: ☐ ☐ District Code ☐☐☐ Geo Location GPS: latitude ☐ longitude ☐ Note for location: ____________ Questionnaire administration: ☐ Face-to-face ☐ Telephone ☐ Self-response (paper) ☐ Self-response (electronic/mobile)	
	2017-18 Survey respondent : Yes: ☐ No ☐ If yes, match respondent ID from Index ☐☐☐☐	

SKILLS FOR TOURISM PROJECT • LAO/029

Tourism and Hospitality Enterprise Survey of Employment and Skills

The LAO/029 Skills for Tourism Project:
The Skills for Tourism Project receives financial support from the Governments of Lao PDR, Switzerland and the Grand Duchy of Luxembourg. The Project allows for improvements in Tourism and Hospitality related vocational education and skills development in Lao PDR through enhanced quality, financing and governance. A particular emphasis of this Project is to support disadvantaged youth from poor families to acquire the skills needed to work in hotels, restaurants and the greater tourism economy in Lao PDR. The overall project objective is the promotion of the sustainable and inclusive growth of the Lao PDR Tourism and Hospitality sector thereby contributing to poverty reduction.

Survey Objectives:
The 2021 Tourism and Hospitality Enterprise Survey is the second survey commissioned under the Skills for Tourism Project. The survey results will provide a timely update on the growth in the sector since the 2017-18 survey and will quantify the impacts of the COVID-19 pandemic on tourism and hospitality businesses in Lao PDR. This Survey aims to: (a) ascertain the numbers employed in the Tourism and Hospitality sector by occupation, skill level, gender and province; (b) quantify the number of vacancies that currently exist by occupation, skills level and province; (c) identify priority occupations associated with shortage of supply by skill level and province; and (d) these data will be used to assess the future skills requirements of the Tourism and Hospitality sector in Lao PDR from 2021 to 2026 by occupation, skill level and province.

Confidentiality:
All information collected as part of this survey is confidential. Under no circumstances will data be shared in public or for other purposes besides the completion of the survey objectives. The respondents' anonymity and privacy will be protected and will not appear in any Project LAO/029 reports or documentation.

Your cooperation will be valuable to the Tourism and Hospitality sector, the providers of vocational education and skills development in Lao PDR and your enterprise.

Screening questions by enumerator:

S1. What is the core business activity of this enterprise? (See below for Enterprise codes 1 through 9)	☐	If code = 9, business is out of scope, end survey)
S2. Does this business provide services to tourists (domestic and/or international)?	☐ Yes	☐ No (if no, business is out of scope, end survey)
S3 Including you, does this business usually employ 3 or more staff?	☐ Yes	☐ No (if no, business is out of scope, end survey)
S4. Is this business currently trading (i.e. open for business)?	☐ Yes	☐ No (if no, S5)
S5. Is this business temporarily closed?	☐ Yes	☐ No closed down (business is out of scope, end survey)
Enterprise codes: 1 = Hotel ; 2 = Resort; 3= Guesthouse; 4= Restaurant; 5= Entertainment; 6= Travel Agency; 7= Attraction; 8= Handicraft/Souvenir retail; 9= Other non-Tourism related business		

Skills for Tourism Survey

Instruction: For each of the following questions, please tick the box and/or enter your response in the space provided as appropriate

Section 1: About You and Your Business Enterprise

Respondent details:

1. What is your name	First name Last name
2. What is your position in this business? ➢ Owner ➢ Senior manager ➢ Another manager (please specify) ➢ Another role (please specify)	
3. What is your age and gender?	Years Male Female
4. How long have you worked in this enterprise?	Years
5. Please provide the following contact details: ➢ Mobile number: ➢ Main mobile App (if applicable) ➢ E-mail address • (Contact details will remain confidential but are required should we need to clarify your responses)	

Enterprise details:

6. Please enter the enterprise name: ➢ **In Lao** ➢ **In English**	
7. Please provide the business address	No. Street Village District
8. In what year was this business established?	YYYY
9. Does this business have: ➢ A Website? ➢ A Facebook page? ➢ Business mobile App? • If yes, please enter web address	No. Yes No. Yes.
10. What is the ownership of this enterprise? ➢ 100% Laotian ➢ 100% Foreign (specify country) ➢ Mixed Laotian and foreign (specify % foreign and country)	%
11. Is this business premises leased or rented? If yes, when does the lease or rental period expire?	Yes MM / YYYY Expiry date No
12. Is this business enterprise affiliated or associated with any of the following? a. Lao Hotel and Restaurant Association (LHRA) b. Lao Association of Travel Agents (LATA) c. Lao Handicraft Association/Group (LHA/Group) d. Pacific Asia Travel Association (PATA) e. Lao Chamber of Commerce and Industry f. None of the above g. Other (specify) • (Province and/or central)	(Please tick all that apply**)**

Section 2: Your Operations, Services and Capacity

13. Please indicate in the table below the type of business operation and services offered in your enterprise (tick all that apply)

1. HOTEL ☐

Number of stars: _____

Classified by: __________

Number of rooms: _____

Daily guest capacity:_______

2. RESORT ☐

Number of stars: _____

Classified by: __________

Number of rooms: _____

Daily guest capacity:_______

3. GUESTHOUSE ☐

Number of Dok Champa: _____

Classified by: __________

Number of rooms: _____

Daily guest capacity:_______

Services

Food & Beverage

- ☐ Breakfast
- ☐ Lunch
- ☐ Dinner
- ☐ All-day
- ☐ F&B outlets
- ☐ Bar

Other services

- ☐ Room service
- ☐ Laundry service
- ☐ Airport transfer
- ☐ Function/Conference
- ☐ Tour information
- ☐ Other, specify__________

____

Facilities

- ☐ Credit/Debit Card
- ☐ Wifi
- ☐ Elevator
- ☐ Spa, massage
- ☐ CCTV / Security
- ☐ Ramp / wheelchair access
- ☐ Emergency medical
- ☐ Disabled access
- ☐ Swimming pool
- ☐ Gym
- ☐ Other, specify: ________

4. RESTAURANT ☐

Seating capacity:__________

Covers/day, capacity: _______

Type

- ☐ Café /Cafeteria
- ☐ Fast food
- ☐ Buffet
- ☐ Casual dining
- ☐ Family
- ☐ Fine dining
- ☐ Barbecue
- ☐ Beer garden
- ☐ Catering
- ☐ Other, specify:_______

____

Food Specialty

- ☐ Lao
- ☐ Thai
- ☐ Vietnamese
- ☐ Chinese
- ☐ Korean
- ☐ Japanese
- ☐ German
- ☐ Italian
- ☐ French
- ☐ Other European
- ☐ Other, specify:_________
- ☐

____

Beverage

Alcohol

- ☐ Beer
- ☐ Wine/Champagne
- ☐ Spirits/Cocktails

Non-alcoholic

- ☐ Fresh fruit juice / homemade drinks
- ☐ Tea / Coffee
- ☐ Other, specify:_______

____

5. ENTERTAINMENT ☐

Daily patron capacity: _______

Type

- ☐ Pub / bar
- ☐ Nightclub
- ☐ Discotheque
- ☐ Other, specify: _______

____

Services

- ☐ Music / DJ
- ☐ Karaoke
- ☐ Live music
- ☐ Live cultural show
- ☐ Public dancing
- ☐ Other, specify:_______

____

6. TRAVEL AGENCY ☐

Daily client capacity: ________

Type

- ☐ Tour agent
- ☐ In-bound tour operator
- ☐ Out-bound tour operator
- ☐ Travel booking
- ☐ Other, specify:__________

____

Services

- ☐ Vehicle rentals: car, van, bike, Boat, etc.
- ☐ Tour guide
- ☐ Tour advice
- ☐ Travel insurance
- ☐ Destination planning
- ☐ Tour package
- ☐ Accommodation reservation
- ☐ Flight bookings
- ☐ Airport transfer
- ☐ Other, specify:__________

____

7. ATTRACTION ☐

Daily visitor capacity: _______

Type

- ☐ Cultural
- ☐ Natural
- ☐ Historical
- ☐ Other, specify:__

____

Services

- ☐ Entrance ticketing
- ☐ Information center
- ☐ Attraction tour by local tour guide
- ☐ Attraction tour by by non-local guide
- ☐ Vehicle rentals: car, van, bike, boat
- ☐ Kayaking, tubing, boating
- ☐ Hiking
- ☐ Mountain climbing
- ☐ Elephant riding
- ☐ Training, specify: __________
- ☐ Other, specify: __________

____

8. HANDICRAFT ☐

Daily customer capacity: ______

Type

- ☐ Retail
- ☐ Wholesale
- ☐ Export
- ☐ Production
- ☐ Training
- ☐ Other, specify: __________

____

Products and Services

- ☐ Textiles
- ☐ Wooden items
- ☐ Wicker
- ☐ Silver
- ☐ Pottery
- ☐ Bag
- ☐ Trinkets
- ☐ Jewelry
- ☐ Packing / delivery
- ☐ Other, specify: __________

____

Section 3: Impact of the COVID-19 pandemic

14. Was this business temporarily closed for any period during 2020?		Yes ____ Months closed (from -to)
		No
15. What was the estimated total turnover (sales or revenue) of this business:		
➢ in 2020?		____ Million Kip/year
➢ In 2019?		____ Million Kip/year
(provide an estimate of average monthly turnover if easier for respondents)		
16. Please provide an estimate of the total expenses of this business in 2020 for:		
➢ Wages and salaries		____ Million Kip/year
➢ Other expenses		____ Million Kip/year
(provide an estimate of average monthly expenses if easier for respondents)		
17. Did this business receive a discount on its rent or lease payments due to COVID-19?		Yes
		No
		Not applicable – not leased or rented
18. Did this business scale down or discontinue some services during 2020 due to the COVID-19 pandemic?		Yes ____ No
• If yes, what services were scaled down or discontinued? (identify relevant services from section 2**)**		1)
		2)
		3)
19. What other measures has this business taken to mitigate the impacts of COVID-19 on your business operations?		(Tick all that apply)
a. Cut staff numbers	☐	
b. Cut staff wages	☐	
c. Reduced operating hours	☐	
d. Restructured the business operations	☐	
e. Increased borrowings	☐	
f. Other, please specify________________	☐	
g. No measures undertaken	☐	
20. Has this business provided any assistance to employees laid off during the lockdown or temporary closure due to the pandemic?		Yes
		No (go to Q22)
21. If yes, what types of assistance have been provided?		(Tick all that apply)
a. Provided partial salary	☐	
b. Assisting with food, clothing, or accommodation	☐	
c. Helped find another job	☐	
d. Other assistance, please specify	☐	
22. What safety measures have been/will be implemented in your business to ensure guests and staff will feel more comfortable after the pandemic?		(Tick all that apply)
a. Train staff to follow government guidelines	☐	
b. Install and maintain sanitizers on the premises	☐	
c. Social distancing of customers on the premises	☐	
d. Wearing masks and PPE by housekeeping staff	☐	
e. Wearing of masks by patrons	☐	
f. Minimum physical contact with guests	☐	
g. Cashless payments	☐	
h. Other, please specify	☐	
23. How do you rate the longer-term viability of your business?		
➢ Not sure what will happen in the future	☐	
➢ Business is not viable, likely to permanently close the business within the next 3-6 months	☐	
➢ Business is viable, expect to continue operating but at a reduced capacity	☐	
➢ Business is viable, expect business to fully recover to pre-pandemic capacity	☐	
➢ Business is viable and expect the business to grow/expand in the next 12-months	☐	

Section 4: Your Customers, Staff and Seasonality

24. Please indicate how busy your business was each month during 2020. a. For each month show your level of occupancy or volume of customers relative to full capacity (i.e., 100% = fully booked) (For example; Jan 100%; Feb 90%; Mar 70%) **b.** Indicate which months, if any, your business was temporarily closed with an "X"	Jan	Feb	Mar	Apr	May	Jun
	Jul	Aug	Sep	Oct	Nov	Dec
25. Please indicate the number of permanent employees (full-time and part-time) employed in your business each month during 2020.	Jan	Feb	Mar	Apr	May	Jun
	Jul	Aug	Sep	Oct	Nov	Dec
26. Does your business engage temporary employees (seasonal and casual) ?		Yes				
		No (go to Q28)				
27. If Yes, please indicate the number of seasonal and casual workers employed in your business for each month during 2020	Jan	Feb	Mar	Apr	May	Jun
	Jul	Aug	Sep	Oct	Nov	Dec

Type of customers: **28. Of your customers during 2020 what percentage were:**		
a. Tourists (Lao and foreigners)?		%
b. Business travelers (Lao and foreigners)?		%
c. Day trippers (non-overnight stay; Lao and foreigners)?		%
d. Local customers (residents in the area)?		%
• (Please provide your best approximation. Total should add to 100%)	**100%**	
Origin of customers: **29. Of your customers during 2020 what percentage were from:**		
a. Lao (from within your province)?		%
b. Lao (from other provinces)?		%
c. ASEAN nationality (Brunei, Cambodia, Indonesia, Malaysia, Myanmar, the Philippines, Singapore, Thailand, Vietnam)?		%
d. Other Asian?		%
e. Other nationality (Europe, Canada, USA, Africa and Middle East, Australia and New Zealand)?		%
• (Please provide your best approximation. Total should add to 100%)	**100%**	
30. Does this business utilize any online booking/sale services?		Yes
		No (go to Q32)
31. Approximately what percentage of your total bookings/sales are made online?		%
32. Do you have plans to change the scope or scale of your current business operations?		
➢ No plans / not sure		Go to Q35
➢ Likely to remain the same / no change		Go to Q35
➢ Likely to scale UP (please indicate by how much)		% Up
➢ Likely to scale DOWN (please indicate by how much)		% Down
33. If you plan to scale up or down, please specify the type of business and services that will be added or withdrawn from your current operations (please use the list in Section 2 as a guide)**?**		Scale up / Scale down
		1)
		2)
34. Please indicate when you intent to scale up or scale down this business		Near-term (Within the next 3 years)
		Long-term (2025 or later)

Annex

Section 5: Current Employment, Staff Turnover, Training, Vacancies and Recruitment

35. How many staff does this establishment currently employ? (Please provide breakdown as indicated below)?	Total	Female	
How many of these were:			
a. People with disabilities (minor or major impairments)			
b. Disadvantaged people (poor, remote, ethnic, etc.),			
c. Foreign workers			
36. Please indicate the number of permanent staff who:	Total		
➢ Are illiterate/have not completed formal education			
➢ Are currently studying			
➢ Are graduates of discipline other than Tourism/Hospitality			
➢ Have a relevant Tourism or Hospitality qualification;			
Of these, how many of them hold:			
○ Certificate (Level 1,2,3)			
○ Diploma			
○ Higher Diploma			
○ Bachelor degree			
○ Master's degree or higher			
○ Other (specify)			
• Certificate, Level 1 (3-6mths) ; 3.2 = Certificate, Level 2 (6mth-1 yr); 3.3 = Certificate, Level 3 (1-2 yr)			
37. In 2020, what was the turn over number of permanent staff? (Show total and number who were female; and the main positions (max. 3 positions. If None, write 0)	Total	Female	Occ code
	1)		
	2)		
	3)		
38. Of your total staff in 2020, how many received training? If None, go to Q42 (Show total and number who were female)	Total	Female	
39. Which of the following training methods has your business used in 2020? (Please tick all that apply and where indicated, show approximate staff training days per year)			
a. On-the-job			
b. In-house course (using own team)			Days/year
c. In-house course (using training provider elsewhere)			Days/year
d. Online training (using training provider elsewhere)			Days/year
e. via a training provider elsewhere			Days/year
f. Other, please specify			Days/year
40. If using a training provider, which organization(s) provided the training? (Please tick all that apply and indicate whether you were satisfied with the training services of the provider)		Satisfied with training provider? (Circle Y=Yes, N=No)	
a. Technical and Vocational College (Central)		Y/N	
b. Technical and Vocational College (in the province)		Y/N	
c. Technical and Vocational College (in other province)		Y/N	
d. Tourism and Hospitality Center (LANITH)		Y/N	
e. Skills Development Center (Central/province)		Y/N	
f. Institute of Mass Media Cultural and Tourism (IMCT)		Y/N	
g. Provincial Department of Information Culture and Tourism		Y/N	
h. Lao Hotel and Restaurant Association (LHRA) (Central/Province)		Y/N	
i. Others, please specify:		Y/N	
41. What would you suggest to improve the training services of the training providers? (Please provide a maximum of 3 suggestions)	**1.**		
	2.		
	3.		

42. **Please list all occupations employed in your business** (refer to Annex A: List of Occupations/Positions in the Tourism and Hospitality Sector		
Occupation description (be as specific as possible to include the main tasks): (Please use additional sheets if more than 10 occupations		
	Job title	**Main tasks**
Occ1		
Occ2		
Occ3		
Occ4		
Occ5		
Occ6		
Occ7		
Occ8		
Occ9		
Occ10		

For each occupation listed above, please provide the following details: The Occ code will be completed by enumerator	Occ1	Occ2	Occ3	Occ4	Occ5	Occ6	Occ7	Occ8	Occ9	Occ10
43. Please indicate the current number of staff										
44. The number of staff with Tourism and Hospitality qualifications										
45. On a scale of 1 to 5, please provide your assessment of the competency of staff with Tourism and Hospitality qualifications (Where 1=Very poor, 2=poor, 3=average, 4=good, 5=Very good)										

46. How could training of staff be improved? Please suggest up to 5 areas for improvement	
	1.
	2.
	3.
	4.
	5.

47. For each occupation, how many current vacancies do you have? (If Nil vacancies go to Q52**).**	Occ1	Occ2	Occ3	Occ4	Occ5	Occ6	Occ7	Occ8	Occ9	Occ10
48. What is the minimum educational requirement for this vacancy? (Please refer to Annex B: Education codes)										
49. What is the minimum experience required to do this job (in years)? (For example, 0 = no experience; 1= 1 year; 2 = 2 years; 3= 3 years or more?										
50. Is this vacancy: (Please circle either Y = Yes or N = No)										
➢ Open to foreigners?	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
➢ Open to Lao residents?	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
➢ Inclusive of other benefits?	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
If yes, please select specify:										
○ Other financial benefits	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
○ Food	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
○ Accommodation	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
○ Transport	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
○ Other benefit, (specify)	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N
51. Are there other requirements for this job?										
○ Foreign language skills										
○ Computer skills										
○ Other, (please specify)										
○ Other, (please specify)										
52. For each occupation, please estimate the number of staff by occupation/position that you will recruit in the next one year. (Do not include current vacancies**)**										

53. Are any of your current vacancies proving hard-to-fill?		Yes (please specify which occupations are hard to fill)
		No (complete survey)

Occ1	Occ2	Occ3	Occ4	Occ5	Occ6	Occ7	Occ8	Occ9	Occ10
Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N

54. If you answered Yes above, what are the main reasons for having difficulty in recruiting staff to fill job vacancies? (Please tick all that apply)

a. Too much competition from other employers
b. Do not know how to recruit
c. No applications received
d. Applicants do not meet educational requirements
e. Applicants lack relevant skills or experience
f. The applicants do not accept terms and conditions (e.g., pay, shift work/unsociable hours)
g. Remote location of the workplace / poor access to transport
h. Other (please specify)

55. What recruitment methods have you tried to fill the vacancies? (Please tick all that apply)

a. Recommendation of existing employees
b. Word of mouth
c. Post in social media
d. Post in the notice board of the workplace and other places
e. Advertisement in local newspapers
f. Radio or TV advertisement
g. Via TVET/IVET school or teacher
h. Via Skills Development Center
i. Via Professional Trade Association (e.g., LHRA, LATA, LHA, etc.)
j. Via internship program of the enterprise
k. Via government or private recruitment agency
l. Walk in
m. From extended family
n. Other (please specify)

That completes the Survey. Thank you very much for your kind cooperation!

Annex A: List of Occupations/Positions in Tourism and Hospitality Sector

ໂຮງແຮມ HOTEL	ຮ້ານອາຫານ RESTAURANT	ສະຖານບັນເທີງ ENTERTAINMENT
Manager / ຕຳແໜ່ງບໍລິຫານ • **1211** : Accounting, Finance Manager ຜູ້ບໍລິຫານ ການເງິນ, ການບັນຊີ • **1212** : Human Resource Manager ຜູ້ບໍລິຫານບຸກຄະລາກອນ • **1411a** : Director ຜູ້ອຳນວຍການ • **1411b** : Director General ຜູ້ອຳນວຍການໃຫຍ່ • **1411c**: Manager General ຜູ້ຈັດການໃຫຍ່ • **1412a** : Restaurant Manager ຜູ້ຈັດການຮ້ານອາຫານ **Front Office / ພະແນກປະຊາສຳພັນ** • **1219** : Front Office Manager ຜູ້ຈັດການ ພະແນກປະຊາສຳພັນ/ສ່ວນໜ້າ • **4224a** : Front Office Supervisor ຜູ້ຊີ້ນຳ ພະແນກປະຊາສຳພັນ • **4224b** : Receptionist ພະນັກງານຮັບຕ້ອນ • **4223** : Telephone Operator ພະນັກງານຮັບໂທລະສັບ • **5414a** : Bell boy ພະນັກງານເປີດປະຕູ • **5414b** : Concierge ພະນັກງານຫິ້ວເຄື່ອງ **Housekeeping / ພະແນກຮັກສາຄວາມຮຽບຮ້ອຍ** • **5151a** : Executive Housekeeper ຫົວໜ້າຮັກສາຄວາມຮຽບຮ້ອຍ (ຫົວໜ້າແມ່ເຮືອນ) • **5151b** : Laundry Manager ຜູ້ຈັດການ ຊັກ-ລີດ • **5151c** : Floor Supervisor ຫົວໜ້າ ປະຈຳຊັ້ນ • **9121a** : Laundry Attendant ພະນັກງານຊັກ-ລີດ • **9121b** : Room Attendant ພະນັກງານຫ້ອງພັກ • **9129** : Public Area Cleaner ພະນັກງານອະນາໄມນອກອາຄານ (ສວນ, ສະລອຍນ້ຳ ແລະອື່ນໆ) **Food Production / ພະແນກປຸງແຕ່ງອາຫານ** • **3434a** : Executive Chef ຫົວໜ້າພໍ່ຄົວ-ແມ່ຄົວ • **3434b** : Demi Chef ຜູ້ຊ່ວຍ ຫົວໜ້າພໍ່ຄົວ-ແມ່ຄົວ • **3434c** : Commis Chef ພໍ່ຄົວ-ແມ່ຄົວ ປະຈຳຮ້ານ • **3434d** : Chef de Partie ຫົວໜ້າຄົວ • **7512a** : Commis Pastry ຊ່າງເຮັດເຂົ້າຈີ່ • **7512b** : Baker ຊ່າງອົບເຂົ້າໜົມ-ເຂົ້າຈີ່ • **7511** : Butcher ຊ່າງຄົວຊີ້ນ-ຄົວປາ **Elementary Occupations / ຕຳແໜ່ງຮັບໃຊ້ພື້ນຖານ** • **8322** : Driver ພະນັກງານຂັບລົດ • **9112** : Cleaner and Helper ພະນັກງານອະນາໄມ ແລະ ຜູ້ຊ່ວຍວຽກທົ່ວໄປ	**Manager / ຕຳແໜ່ງບໍລິຫານ** • **1211** : Accounting, Finance Manager ຜູ້ບໍລິຫານ ການເງິນ, ການບັນຊີ • **1212** : Human Resource Manager ຜູ້ບໍລິຫານບຸກຄະລາກອນ • **1411a** : Director ຜູ້ອຳນວຍການ • **1411b** : Director General ຜູ້ອຳນວຍການໃຫຍ່ • **1411c** : Manager General ຜູ້ຈັດການໃຫຍ່ • **1412a** : Restaurant Manager ຜູ້ຈັດການຮ້ານອາຫານ **Food Production / ພະແນກປຸງແຕ່ງອາຫານ** • **3434a** : Executive Chef ຫົວໜ້າຊ່າງຄົວ, ພໍ່ຄົວໃຫຍ່ / ແມຄົວໃຫຍ່ • **3434b** : Demi Chef ຜູ້ຊ່ວຍ ຫົວໜ້າຊ່າງຄົວ • **3434c** : Commis Chef ພໍ່ຄົວ-ແມ່ຄົວ ປະຈຳຮ້ານ • **3434d** : Chef de Partie ຫົວໜ້າຄົວ • **7512a** : Commis Pastry ຊ່າງເຮັດເຂົ້າຈີ່ • **7512b** : Baker ຊ່າງອົບເຂົ້າໜົມ-ເຂົ້າຈີ່ • **7511** : Butcher ຊ່າງຄົວຊີ້ນ-ຄົວປາ • **9412** : Kitchen Helper ຜູ້ຊ່ວຍວຽກຄົວ • **9411** : Fast Food Preparer ຜູ້ກຽມແຕ່ງອາຫານຈານດ່ວນ **Sales and Service Workers / ແຮງງານໃຫ້ບໍລິການ ແລະ ການຂາຍ** • **5131a** : Waiter Head ຫົວໜ້າ ພະນັກງານເສີບ • **5131b** : Waiter, Waitress ພະນັກງານເສີບຊາຍ-ຍິງ • **5132** : Bartender ພະນັກງານປະສົມເຄື່ອງດື່ມ **Entertainment / ບັນເທີງ** • **2652a** : Singer ນັກຮ້ອງ, ໝໍລຳ • **2653** : Dancer ນັກຟ້ອນ, ນັກເຕັ້ນ • **2652b** : Musician ນັກດົນຕຣີ • **2652c** : Disc Jockey (DJ) ຜູ້ປ່ອຍສຽງເພງ, ຜູ້ດຳເນີນລາຍການ **Elementary Occupations / ຕຳແໜ່ງຮັບໃຊ້ພື້ນຖານ** • **9112** : Cleaner and Helper ພະນັກງານອະນາໄມ ແລະ ຜູ້ຊ່ວຍວຽກທົ່ວໄປ • **5414c** : Security Guard ພະນັກງານຮັກສາຄວາມປອດໄພ	**Manager / ຕຳແໜ່ງບໍລິຫານ** • **1211** : Accounting, Finance Manager ຜູ້ບໍລິຫານ ການເງິນ, ການບັນຊີ • **1212** : Human Resource Manager ຜູ້ບໍລິຫານ ບຸກຄະລາກອນ • **1411a** : Director ຜູ້ອຳນວຍການ • **1411b** : Director General ຜູ້ອຳນວຍການໃຫຍ່ • **1411c** : Manager General ຜູ້ບໍລິຫານໃຫຍ່ • **1412a** : Restaurant Manager ຜູ້ຈັດການ ຮ້ານອາຫານ • **1412b** : Karaoke Manager ຜູ້ຈັດການ ກາຣາໂອເກະ • **1412c** : Night club, Bar, Discotheque Manager ຜູ້ຈັດການ ຫ້ອງບັນເທີງໄນຕ໌ຄລັບ, ເທັຄ, ບາຣ໌ • **1221** : Sale and Marketing Manager ຜູ້ຈັດການ ການຕະຫລາດ ແລະ ການຂາຍ **Entertainment Professionals / ຕຳແໜ່ງວິຊາສະເພາະການບັນເທີງ** • **2652a** : Singer ນັກຮ້ອງ, ໝໍລຳ • **2653** : Dancer / Choreographer ນັກຟ້ອນ, ນັກເຕັ້ນ / ນັກອອກແບບທ່າຟ້ອນ-ທ່າເຕັ້ນ • **2652b** : Musician ນັກດົນຕຣີ • **2652c** : Disc Jockey (DJ) ຜູ້ປ່ອຍສຽງເພງ / ຜູ້ດຳເນີນລາຍການ **Food Production / ພະແນກປຸງແຕ່ງອາຫານ** • **3434a** : Executive Chef / Chef ຫົວໜ້າພໍ່ຄົວ-ແມ່ຄົວ • **9411** : Food / Snacks Preparers ຊ່າງປຸງແຕ່ງອາຫານ ແລະ ອາຫານເບົາ • **9412** : Kitchen Helper ຜູ້ຊ່ວຍເຮືອນຄົວ • **5132** : Bartender ພະນັກງານປະສົມເຄື່ອງດື່ມ **Sales and Service Workers / ແຮງງານໃຫ້ບໍລິການ ແລະ ການຂາຍ** • **5131a** : Waiter Head ຫົວໜ້າພະນັກງານເສີບ • **5131b** : Waiter / Waitress ພະນັກງານເສີບ (ຊາຍ-ຍິງ) **Elementary Occupations / ຕຳແໜ່ງຮັບໃຊ້ພື້ນຖານ** • **9112** : Cleaner and Helper ພະນັກງານອະນາໄມ ແລະ ຜູ້ຊ່ວຍວຽກທົ່ວໄປ • **5414c** : Security Guard ພະນັກງານຮັກສາຄວາມປອດໄພ

• **9412** : Kitchen Helper ຜູ້ຊ່ວຍວຽກເຮືອນຄົວ • **5414c** : Security Guard ພະນັກງານຮັກສາຄວາມປອດໄພ		

ສະຖານທີ່ທ່ອງທ່ຽວ ATTRACTION	ບໍລິສັດທ່ອງທ່ຽວ TRAVEL AGENCY	ຫັດຖະກຳ HANDICRAFT
Manager / ຕຳແໜ່ງບໍລິຫານ • **1411b** : Director General ຜູ້ອຳນວຍການໃຫຍ່ • **1411c** : Manager General ຜູ້ບໍລິຫານໃຫຍ່ • **1211** : Accounting, Finance Manager ຜູ້ບໍລິຫານ ການເງິນ, ການບັນຊີ • **1439c** : Ticketing Manager ຜູ້ຈັດການ ຂາຍປີ້ • **1221** : Sale and Marketing Manager ຜູ້ຈັດການການຕະຫລາດ ແລະ ການຂາຍ **Sales and Service Workers / ແຮງງານໃຫ້ບໍລິການ ແລະ ການຂາຍ** • **4225** : Ticket Seller ພະນັກງານຂາຍປີ້, ບັດຜ່ານປະຕູ • **4222** : Information Attendant ພະນັກງານປະຊາສຳພັນ, ໃຫ້ຂໍ້ມູນສະຖານທີ່ • **5113** : Tour Guide ພະນັກງານນຳທ່ຽວ (ມັກກຸເທດ) **Elementary Occupations / ຕຳແໜ່ງຮັບໃຊ້ພື້ນຖານ** • **9112** : Cleaner and Helper ພະນັກງານອະນາໄມ ແລະ ຜູ້ຊ່ວຍວຽກທົ່ວໄປ • **5414c** : Security Guard ພະນັກງານຮັກສາຄວາມປອດໄພ • **8322** : Driver ພະນັກງານຂັບລົດ • **9129** : Gardener ຄົນສວນ	**Travel Agency / ບໍລິການການທ່ອງທ່ຽວ** • **1411d** : General Manager ຜູ້ຈັດການທົ່ວໄປ • **1411e** : Assistant General Manager ຜູ້ຊ່ວຍຜູ້ຈັດການທົ່ວໄປ • **4221** : Senior Travel Consultant ທີ່ປຶກສາດ້ານການທ່ອງທ່ຽວ(ອາວຸໂສ) • **4221** : Travel Consultant ທີ່ປຶກສາດ້ານການທ່ອງທ່ຽວ **Tour Operation / ຈັດການການນຳທ່ຽວ** • **1439a** : Product Manager ຜູ້ຈັດການ ຜະລິດຕະພັນການທ່ອງທ່ຽວ • **1221** : Sales and Marketing Manager ຜູ້ຈັດການ ຝ່າຍຂາຍ ແລະ ການຕະຫລາດ • **1439b** : Credit Manager ຜູ້ຈັດການ ຄຸນນະພາບ ແລະ ຄວາມໜ້າເຊື່ອຖື • **1439c** : Ticketing Manager ຜູ້ຈັດການ ປີ້ບໍລິການ • **1439d** : Tour Manager : ຜູ້ຈັດການ ການນຳທ່ຽວ • **5113** : Tour guide ພະນັກງານນຳທ່ຽວ (ມັກກຸເທດ)	**Manager / ຕຳແໜ່ງບໍລິຫານ** • **1411b** : Director General ຜູ້ອຳນວຍການໃຫຍ່ • **1411c** : Manager General ຜູ້ບໍລິຫານໃຫຍ່ • **1211** : Accounting, Finance Manager ຜູ້ບໍລິຫານ ການເງິນ, ການບັນຊີ • **1420** : Retail, Shop Manager ຜູ້ຈັດການຫ້ອງຂາຍ • **1221** : Sales, Marketing, Advertisement Manager ຜູ້ຈັດການ ການຂາຍ, ການຕະຫລາດ, ການໂຄສະນາ **Sales and Service Workers / ແຮງງານໃຫ້ບໍລິການ ແລະ ການຂາຍ** • **4225** : Seller Head, Seller ຫົວໜ້າຝ່າຍຂາຍ, ພະນັກງານຂາຍ **Elementary Occupations / ຕຳແໜ່ງຮັບໃຊ້ພື້ນຖານ** • **9112** : Cleaner and Helper ພະນັກງານອະນາໄມ ແລະ ຜູ້ຊ່ວຍວຽກທົ່ວໄປ • **5414c** : Security Guard ພະນັກງານຮັກສາຄວາມປອດໄພ • **8322** : Driver ພະນັກງານຂັບລົດ

Annex B: Education Codes

Education codes:

0 = No Education/Primary education
1 = Lower secondary education
2 = Upper secondary education
3.1 = Certificate, Level 1 (3-6mths)
3.2 = Certificate, Level 2 (6mth-1 yr)
3.3 = Certificate, Level 3 (1-2 yr)
4 = Diploma
5 = Higher Diploma
6 = Bachelor’s degree
7 = Master’s Degree or higher

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