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An Analysis of Tourism Development in Vietnam during 2021-2025 and Policy Implications

Ngo Thi Duyen
Hanoi University of Natural Resources and Environment, Hanoi, Vietnam

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Corresponding Author: **Ngo Thi Duyen**

Abstract
This study examines the trajectory of tourism development in Vietnam during 2021–2025, a period that began with the most severe disruption in the modern history of the sector and ended with record international arrivals and tourism receipts. Using descriptive statistical analysis and documentary review, the paper synthesizes data from the National Statistics Office of Vietnam, the Viet Nam National Authority of Tourism, government policy documents, UN Tourism, the World Economic Forum, the World Travel & Tourism Council, and peer-reviewed studies. The analysis uses 2019 as a pre-pandemic benchmark and evaluates changes in international arrivals, domestic tourist trips, total tourism receipts, recovery rates, and policy milestones. The results identify four successive phases: Crisis and domestic containment in 2021; reopening and demand release in 2022; accelerated international recovery in 2023; near-complete normalization and revenue expansion in 2024; and record-scale growth in 2025. International arrivals rose from 0.157 million in 2021 to 21.168 million in 2025, while domestic tourist trips increased from 40 million to 137.5 million and total tourism receipts from VND 180 trillion to approximately VND 1 quadrillion. Nevertheless, rapid volume recovery has not fully resolved structural weaknesses. Vietnam remains constrained by uneven destination management, limited tourism service infrastructure, modest visitor spending, labor shortages, fragmented digital data, environmental pressure, seasonality, and dependence on a relatively concentrated set of Asian source markets. The paper argues that the next policy cycle should move beyond arrival maximization toward value creation, resilience, green transition, better spatial distribution of tourism benefits, and evidence-based destination governance. Seven policy priorities are proposed, including improved visa and air connectivity, high-value product development, destination management reform, tourism workforce upgrading, integrated digital infrastructure, climate-resilient green investment, and a stronger tourism statistical system.

Keywords: Vietnam Tourism, Tourism Recovery, Domestic Tourism, International Arrivals, Tourism Receipts, Sustainable Tourism, Tourism Policy

1. Introduction

Tourism entered the 2021–2025 period as one of the sectors most exposed to the consequences of the COVID-19 pandemic. International mobility restrictions, border closures, health controls, reduced air capacity, and a collapse in traveler confidence produced a shock that differed from previous tourism crises in both geographical reach and duration. Global tourism research has described the pandemic not merely as a temporary interruption but as a stress test for the institutional, environmental, technological, and labor foundations of tourism systems (Gössling *et al*., 2021; Hall *et al*., 2020; Sigala, 2020) [6, 7, 14]. The crisis revealed how destinations that had relied on continuous visitor growth could become vulnerable when demand stopped abruptly, while it also created political space to reconsider resilience, sustainability, digitalization, and the distribution of tourism benefits.

Vietnam provides a particularly informative case. Before the pandemic, the country had become one of Asia's fastest-growing destinations. In 2019, Vietnam welcomed more than 18 million international visitors and 85 million domestic tourist trips, generated VND 755 trillion in tourism receipts, and recorded a direct tourism contribution estimated at 9.2% of gross domestic product in the official tourism annual report (Viet Nam National Administration of Tourism [VNAT], 2020) [16]. The sector's rapid expansion was supported by improved air connectivity, rising household incomes, a diversified portfolio of cultural and natural attractions, competitive prices, and growing recognition of destinations such as Hanoi, Ho Chi Minh City, Ha

Long Bay, Da Nang, Hoi An, Nha Trang, Phu Quoc, and the northern mountain regions.

The pandemic reversed this trajectory. In 2021, international arrivals fell to approximately 157,300, only 0.9% of the 2019 level. Domestic tourism was repeatedly interrupted by local outbreaks and mobility restrictions, while many tourism enterprises suspended operations, reduced employment, or exited the market. The damage extended beyond travel agencies and accommodation providers to aviation, restaurants, retail, cultural services, transport, entertainment, and local livelihoods. Vietnam therefore began the five-year period with two simultaneous challenges: Managing a public-health emergency and preserving enough productive capacity for a future tourism restart.

The subsequent recovery was rapid but uneven. Vietnam fully reopened tourism on 15 March 2022. Domestic travel responded immediately, exceeding 100 million trips during that year, but international recovery remained slower because major Asian source markets reopened at different speeds. In 2023, broader regional reopening, a more supportive visa regime, restored flight networks, and strong destination promotion accelerated inbound demand. By 2024, international arrivals had reached 17.6 million, close to the 2019 record, while tourism receipts exceeded their pre-pandemic nominal value. In 2025, the country received nearly 21.2 million international arrivals, served 137.5 million domestic tourist trips, and generated approximately VND 1 quadrillion in tourism receipts, marking the transition from recovery to a new scale of expansion (VNAT, 2026a, 2026b) [21, 22].

These headline results are important, but they do not by themselves establish that tourism development has become more competitive, sustainable, or resilient. A destination can recover visitor numbers while retaining low average spending, environmental stress, weak interregional linkages, uneven service quality, fragmented governance, and vulnerability to climate events or market concentration. Vietnam's position of 59th among 119 economies in the World Economic Forum's 2024 Travel & Tourism Development Index illustrates the difference between strong demand growth and the broader enabling conditions required for high-quality tourism development (World Economic Forum [WEF], 2024) [25]. The country benefits from natural and cultural resources, price competitiveness, safety, and expanding connectivity, but faces continuing weaknesses in tourism service infrastructure, environmental management, workforce capacity, and policy implementation.

Against this background, the purpose of this paper is to analyze the state of tourism development in Vietnam during 2021–2025 and derive policy implications for the next development stage. The paper addresses four questions. First, how did the main indicators of international arrivals, domestic trips, and tourism receipts change during the period? Second, which policy and market factors explain the pace and pattern of recovery? Third, what structural limitations became visible despite the recovery in visitor volume? Fourth, which policy priorities can help Vietnam shift from recovery-led growth to value-oriented, resilient, and sustainable tourism?

The paper makes three contributions. It provides an integrated five-year account based on official statistics rather than isolated monthly developments. It distinguishes between recovery in scale and improvement in development quality by comparing visitor numbers, receipts, competitiveness, and institutional conditions. Finally, it converts the empirical findings into a set of policy priorities that connect market access, product development, destination governance, human resources, digitalization, environmental resilience, and statistical capacity. The analysis is intended to be useful to tourism policymakers, destination management organizations, local governments, tourism enterprises, and researchers examining post-pandemic development in emerging destinations.

2. Literature Review and Analytical Perspective

2.1 Tourism crises, recovery, and resilience

Tourism is structurally sensitive to crises because consumption generally requires mobility, physical presence, confidence, and coordination among multiple service providers. Health emergencies, natural disasters, political instability, economic downturns, and transport disruptions can therefore affect demand and supply simultaneously. The COVID-19 shock was exceptional because it closed borders, restricted domestic movement, interrupted global aviation, weakened business balance sheets, and displaced tourism workers across almost all destinations at the same time. International tourist arrivals fell to levels not observed for decades, demonstrating the limitations of growth strategies that did not sufficiently account for systemic risk (UN Tourism, 2025) [15].

Early pandemic research identified several possible recovery pathways. Hall *et al*. (2020) [7] argued that the crisis could reproduce existing tourism structures or create pressure for deeper transformation. Sigala (2020) [14] emphasized the need to reconsider operations, technology, consumer behavior, and research priorities. Gössling *et al*. (2021) [6] noted that the pandemic exposed tourism's dependence on high mobility and fossil-fuel-intensive transport, while also providing an opportunity to align recovery with sustainability objectives. Brouder (2020) [1] described recovery as an evolutionary process in which institutions and firms would adapt along different pathways rather than return uniformly to a previous equilibrium.

Resilience in tourism is therefore more than the speed at which arrivals return. A resilient tourism system can anticipate shocks, absorb short-term disruption, maintain critical functions, adapt products and markets, and reorganize without destroying the ecological and social assets on which tourism depends. Sharma *et al*. (2021) [13] proposed that government response, technological innovation, local belonging, and consumer and employee confidence are central to tourism revival. Disaster and crisis literature similarly stresses collaboration among public authorities, enterprises, communities, and civil-society organizations (Jiang & Ritchie, 2017) [10]. These insights are relevant to Vietnam because the sector's recovery required coordination across immigration, aviation, health, culture, transport, local government, and business support policies.

A further lesson is the importance of domestic tourism. When international demand disappeared, domestic visitors became the principal source of tourism activity in many countries. Domestic tourism can stabilize employment, sustain transport and accommodation capacity, and distribute demand beyond international gateways. However, it is not a complete substitute for international tourism because visitor spending patterns, trip duration, seasonality, and destination choice differ. The Vietnamese experience demonstrates both functions: Domestic demand provided the initial recovery engine, while the restoration of international markets was necessary for stronger revenue growth and fuller recovery of urban hotels, inbound operators, aviation routes, and destinations dependent on foreign travelers.

2.2 From volume recovery to value-oriented and sustainable development

The literature increasingly distinguishes between tourism growth and tourism development. Arrival growth is easily communicated and measured, but it may not reflect visitor value, local income retention, environmental costs, service quality, or resident welfare. A value-oriented approach gives greater attention to spending per visitor, length of stay, seasonality, geographic distribution, local supply chains, cultural authenticity, environmental carrying capacity, and the quality of tourism employment. This is particularly important for destinations competing primarily on price, where high visitor numbers may coexist with narrow profit margins and pressure on infrastructure.

Sustainable tourism research also cautions against treating environmental management as a separate niche. Climate change, biodiversity loss, coastal erosion, water scarcity, waste, congestion, and air pollution can directly undermine destination competitiveness. Vietnam is highly exposed to typhoons, floods, extreme heat, sea-level rise, and coastal risks. Many of its leading destinations are coastal cities, islands, heritage sites, river deltas, or mountain environments whose tourism assets are climate-sensitive. Green transition is therefore both an environmental responsibility and a strategy for protecting future tourism revenue. The World Bank's analysis of Vietnam's greener development pathway similarly stresses climate adaptation, resilient infrastructure, natural-capital protection, and low-carbon growth (World Bank, 2025) [24].

Digital transformation forms another component of post-pandemic tourism development. Digital platforms influence destination discovery, reservation, payment, mobility, service evaluation, and visitor communication. Governments increasingly use digital systems for e-visas, destination information, business registration, data collection, and crisis communication. Yet digitalization can deepen inequality when small enterprises lack skills, financing, or access to integrated platforms. It can also create dependence on global online intermediaries and fragment data across commercial systems. Effective digital transformation thus requires common standards, interoperable public data, cybersecurity, privacy safeguards, and support for small and medium-sized tourism enterprises.

Human resources remain central. Tourism recovery can be constrained when experienced workers leave the sector during a prolonged crisis. Rehiring does not immediately restore accumulated skills, language ability, managerial knowledge, or service culture. Studies of Vietnam during and after the pandemic reported labor displacement, operational difficulties, and the need for training, financial support, innovation, digital capability, and stronger coordination (Hoang *et al*., 2024; Vu *et al*., 2022) [8, 23]. Workforce policy must therefore address not only the quantity of labor but also productivity, career stability, vocational standards, management capability, and the attractiveness of tourism employment.

2.3 Vietnam-specific studies and the research gap

Research on Vietnam's tourism crisis initially concentrated on pandemic impact and immediate recovery strategies. Vu *et al*. (2022) [23] combined official data and stakeholder interviews to document losses in visitors, revenue, employment, and business activity. Their recommended responses included safe tourism, market development, product diversification, marketing, human-resource development, digital transformation, business support, and green growth. Huynh *et al*. (2022) [9] assessed tourism vulnerability and emphasized the need for coordinated recovery scenarios. Hoang *et al*. (2024) [8], drawing on interviews with leading tour operators, highlighted operational constraints and adaptive practices at enterprise level. Lin *et al*. (2023) [11] evaluated recovery strategies using a multi-criteria approach and found that innovative tourism business models were a particularly important priority.

These studies provide valuable explanations of the crisis and the first phase of recovery. However, most were designed before the complete outcomes of 2024 and 2025 became available. As a result, they could not assess whether the recovery recommendations translated into a sustained return of international demand, whether tourism receipts surpassed the pre-pandemic benchmark, or which weaknesses remained after headline indicators improved. The period 2021–2025 now offers sufficient evidence to examine the entire transition from crisis to record growth.

This paper adopts an analytical perspective based on three linked dimensions. The first is recovery of scale, measured through international arrivals, domestic tourist trips, and tourism receipts. The second is quality of development, considered through value creation, product structure, service standards, market diversification, workforce capability, infrastructure, and spatial distribution. The third is resilience and sustainability, assessed through institutional coordination, digital capacity, environmental management, climate exposure, and the ability to withstand future shocks. This is not a predictive model; it is a structured basis for interpreting descriptive evidence and avoiding the assumption that a return of visitor numbers automatically represents complete sectoral recovery.

3. Materials and Methods

The study uses a descriptive and documentary research design. The quantitative component compiles annual tourism indicators for 2021–2025 and uses 2019 as a pre-pandemic reference year. The core variables are international visitor arrivals, domestic tourist trips, and total tourism receipts. International arrival data are drawn primarily from the National Statistics Office of Vietnam and the Viet Nam National Authority of Tourism. Domestic tourism and receipt estimates are drawn from annual sector reviews and official reports of the national tourism authority. The 2019 benchmark is taken from the Vietnam Tourism Annual Report 2019. Data on global recovery, competitiveness, economic contribution, policy changes, and environmental context are obtained from UN Tourism, the World Economic Forum, the World Travel & Tourism Council, the World Bank, and official Government of Vietnam sources.

The documentary component reviews major policies implemented during the period. These include the reopening of tourism in March 2022; Government Resolution No. 82/NQ-CP on accelerating effective and sustainable tourism recovery and development (Government of Vietnam, 2023) [5]; the expansion of the electronic visa to all nationalities, with validity of up to 90 days and multiple entry; the extension of temporary residence under unilateral visa exemption from 15 to 45 days; and the approval of the national tourism system master plan for 2021–2030 with a vision to 2045 (Prime Minister of Vietnam, 2024) [12]. Academic studies on tourism crisis, resilience, sustainability, and Vietnam's post-pandemic recovery are used to interpret the official data.

Three descriptive calculations are applied. Year-on-year growth indicates the speed of change between adjacent years. A recovery index compares each annual indicator with its 2019 value, where 2019 equals 100. A simple receipts-per-recorded-trip indicator divides nominal tourism receipts by the combined number of international arrivals and domestic tourist trips. This last indicator is used cautiously because an "arrival" or "trip" is not equivalent to a unique visitor and because the official receipt estimates combine diverse tourism expenditures. It is included only as a broad signal of changing value, not as a measure of individual tourist spending.

The analysis has several limitations. First, tourism statistics were produced under unusually difficult conditions during the pandemic, and definitions or estimation procedures may not be fully identical across all years. Second, tourism receipts are reported in current Vietnamese dong; consequently, growth reflects a combination of real activity, price changes, and changes in expenditure composition. Third, national aggregates obscure differences among destinations, business segments, and visitor markets. Fourth, the study does not estimate causal effects of individual policies because many market and policy changes occurred simultaneously. The conclusions should therefore be understood as evidence-based interpretation rather than causal identification.

Despite these limitations, triangulation across official statistics, policy documents, international benchmarking reports, and peer-reviewed research provides a credible foundation for assessing the five-year trajectory. The periodization used in the results section follows observable turning points: 2021 as crisis containment; 2022 as reopening; 2023 as accelerated recovery; 2024 as normalization; and 2025 as record expansion.

4. Results

4.1 Overall development of the principal indicators

Table 1 summarizes the principal tourism indicators. The contrast between 2021 and 2025 is exceptionally large. International arrivals increased from 0.157 million to 21.168 million. Domestic tourist trips rose from 40 million to 137.5 million. Nominal tourism receipts expanded from VND 180 trillion to approximately VND 1 quadrillion. By 2025, international arrivals were 17.5% above the 2019 benchmark, domestic tourist trips were 61.8% higher, and nominal receipts were 32.5% higher.

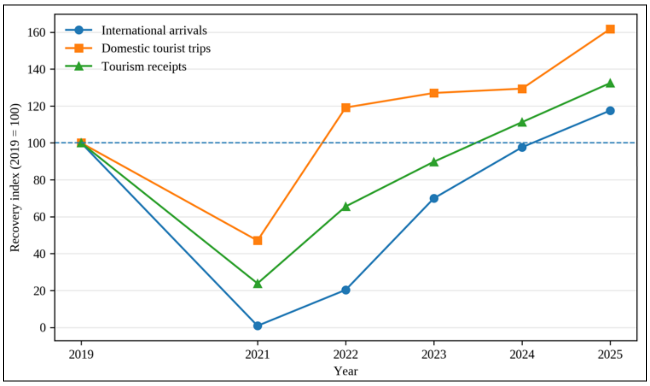
Table 1: Core tourism indicators and recovery against the 2019 benchmark

Year	International arrivals (million)	Domestic trips (million)	Receipts (VND trillion)	Intl. recovery (2019=100)	Domestic recovery (2019=100)	Receipts recovery (2019=100)
2019	18.009	85	755	100.0	100.0	100.0
2021	0.157	40	180	0.9	47.1	23.8
2022	3.661	101.3	495	20.3	119.2	65.6
2023	12.602	108	678	70.0	127.1	89.8
2024	17.584	110	840	97.6	129.4	111.3
2025	21.168	137.5	1000	117.5	161.8	132.5

Source: Author's calculations from GSO and VNAT annual statistics; 2019 is the pre-pandemic benchmark

The sequence of recovery was not uniform. Domestic tourism recovered first and exceeded the 2019 level in 2022. Tourism receipts surpassed the 2019 nominal benchmark in 2024. International arrivals required until 2025 to move clearly above the pre-pandemic record. This sequence reflects the timing of domestic mobility normalization, the reopening schedules of major Asian source markets, air-route restoration, visa policy changes, and the gradual return of traveler confidence.

The data also show a change in the relative role of domestic demand. In 2019, the country served 85 million domestic trips. By 2022, despite international arrivals remaining below four million, domestic trips had reached 101.3 million. The domestic market therefore protected sector activity and created a platform for recovery. However, the strong acceleration of receipts in 2023–2025 coincided with the return of international demand, underlining the importance of inbound tourism for higher-spending services, international aviation, urban hotels, tour operators, and longer itineraries.



Source: Author's calculations from official GSO and VNAT annual indicators

Fig 1: Recovery of core tourism indicators relative to 2019

4.2 The crisis and domestic containment phase in 2021

The year 2021 represents the lowest point of the period. International arrivals were estimated at 157,300, down 95.9% from 2020 and equivalent to less than 1% of the 2019 level (General Statistics Office of Vietnam [GSO], 2022) [2]. These arrivals were largely associated with essential travel, experts, investors, diplomatic activity, and limited pilot arrangements rather than conventional mass tourism. Border controls and the suspension of normal international tourism eliminated demand for inbound operators and significantly reduced activity in major gateway destinations.

Domestic tourism also faced repeated disruption. The sector served approximately 40 million domestic tourist trips, less than half of the 2019 benchmark. Total tourism receipts were approximately VND 180 trillion, equal to only 23.8% of the 2019 level. The fourth domestic wave of COVID-19 affected major population and tourism centers, interrupted the summer season, and increased uncertainty for businesses. Many firms operated intermittently, maintained only a small core workforce, or shifted employees to other sectors.

The most important feature of 2021 was therefore preservation rather than growth. Policy attention focused on public health, business survival, workforce support, and preparation for safe reopening. Pilot programs for vaccinated international visitors were introduced near the end of the year in selected destinations. These programs were limited in scale, but they tested operational procedures and signaled a gradual shift from elimination-oriented restrictions toward safe adaptation.

The crisis exposed several structural vulnerabilities. Many tourism enterprises had limited financial reserves. Informal and seasonal workers lacked strong social protection. Destination data were fragmented, making it difficult to track business closures and labor displacement. The concentration of international demand in aviation-dependent destinations amplified the impact of border closure. At the same time, the crisis demonstrated the strategic importance of domestic tourism and encouraged localities to redesign short-haul, nature-based, wellness, self-drive, and small-group products.

4.3 Reopening and the release of domestic demand in 2022

Vietnam fully reopened tourism on 15 March 2022. The reopening removed quarantine requirements for international visitors and restored the basis for normal commercial travel. The immediate result was a sharp increase in activity, although the domestic and international components recovered at different speeds.

International arrivals reached approximately 3.66 million. This was a substantial increase from 2021 but only about one-fifth of the 2019 level. The result fell below the initial national target, reflecting delayed reopening in several key Asian source markets, limited international air capacity, high transport costs, and continuing uncertainty regarding health procedures. The recovery of long-haul markets was also constrained by flight availability and geopolitical and economic conditions.

Domestic tourism, by contrast, expanded to 101.3 million trips, 19.2% above the 2019 benchmark. Pent-up demand, improved vaccination coverage, restored mobility, and a strong preference for domestic destinations produced an exceptional rebound. Beach destinations, major cities, heritage sites, and nearby leisure markets benefited. The domestic surge helped accommodation, transport, food services, attractions, and travel companies restore cash flow and re-employ workers.

Tourism receipts reached VND 495 trillion, an increase of 175% from 2021 but still 34.4% below the 2019 level. The difference between strong domestic volume and incomplete revenue recovery suggests that domestic trips were generally shorter or lower-spending than the international demand lost during the pandemic. It also reflects price discounts used by enterprises to stimulate demand and the slow return of business travel and higher-value inbound segments.

Operational bottlenecks became increasingly visible in 2022. Businesses attempting to expand quickly encountered labor shortages because many experienced employees had moved to other industries. Service quality was uneven, particularly where recruitment and retraining lagged behind demand. Airlines and airports faced capacity pressures. Some destinations concentrated on visitor volume without adequate management of waste, congestion, public space, or community impacts. Thus, reopening solved the immediate demand crisis but created a new challenge: Rebuilding supply capability and service quality at the same speed as demand.

4.4 Accelerated international recovery and policy reform in 2023

The year 2023 marked a decisive acceleration. International arrivals increased to 12.602 million, approximately 3.4 times the 2022 level and 70% of the 2019 benchmark. Domestic tourist trips reached 108 million, while tourism receipts rose to VND 678 trillion. Receipts recovered to almost 90% of the 2019 nominal level.

Several factors explain the improvement. Major Asian markets reopened more fully, particularly China, while South Korea remained Vietnam's leading source market. International flight networks expanded, and destinations intensified promotion. Enterprises had more time to restore staff and operations. Global traveler confidence improved, and Vietnam's competitive prices remained attractive during a period of rising travel costs.

Policy reform also became more prominent. In May 2023, the Government issued Resolution No. 82/NQ-CP, which called for faster, more effective, and sustainable tourism recovery (Government of Vietnam, 2023) [5]. The resolution emphasized institutional reform, market development, tourism products, promotion, business support, digital transformation, human resources, and coordination. In August 2023, Vietnam expanded electronic visa eligibility to citizens of all countries and territories, increased e-visa validity to a maximum of 90 days with single or multiple entry, and extended temporary residence for citizens covered by unilateral visa exemption from 15 to 45 days (Government News, 2023a, 2023b) [3, 4]. These measures reduced entry friction and improved Vietnam's competitiveness for longer itineraries, repeat entry, business-leisure combinations, and regional travel.

The 2023 result nevertheless remained below the international-arrival record of 2019. Recovery was uneven by market. South Korea recovered strongly, while China's outbound recovery was slower during part of the year. Long-haul European and North American markets faced limited direct connectivity and relatively high airfares. Vietnam's tourism promotion budget and market intelligence remained modest compared with major regional competitors. Product development also lagged in some destinations, with a continued concentration on sightseeing and basic accommodation rather than integrated cultural, creative, wellness, entertainment, medical, educational, or high-spending experiences.

The year therefore represented a shift from emergency recovery to competitive policy. The central question was no longer whether tourism would return, but whether Vietnam could convert restored demand into longer stays, higher spending, repeat visitation, improved employment, and more balanced regional development.

Table 2: Selected policy milestones shaping tourism recovery, 2021-2025

Date/period	Policy or institutional action	Primary mechanism	Observed relevance
Late 2021	Pilot reception of vaccinated international visitors	Tested health, border, and destination procedures	Prepared operational conditions for reopening
15 Mar. 2022	Full reopening of domestic and international tourism	Restored normal commercial travel and removed major health-related barriers	Released domestic demand and restarted inbound services
18 May 2023	Resolution No. 82/NQ-CP	Coordinated institutional reform, products, promotion, business support, digitalization, and workforce development	Shifted policy from emergency response toward effective and sustainable recovery
15 Aug. 2023	E-visa extended to all nationalities for up to 90 days; multiple entry permitted	Reduced entry costs and enabled longer and multi-destination itineraries	Supported faster international recovery from late 2023
13 Jun. 2024	Tourism System Master Plan 2021–2030, vision to 2045	Set spatial, product, infrastructure, and sustainability directions	Provided a long-term framework beyond short-term recovery
2024–2025	Expanded aviation links, destination promotion, events, and market diversification	Improved access, awareness, and demand generation	Contributed to near-normalization in 2024 and record arrivals in 2025

Source: Compiled from official Government of Vietnam and VNAT documents cited in the reference list

4.5 Near-complete normalization and revenue expansion in 2024

In 2024, Vietnam welcomed 17.584 million international arrivals, an increase of 39.5% from 2023 and approximately 97.6% of the 2019 level. Domestic tourist trips reached 110 million. Total tourism receipts were estimated at VND 840 trillion, 23.9% higher than in 2023 and 11.3% above the 2019 nominal benchmark (VNAT, 2025a).

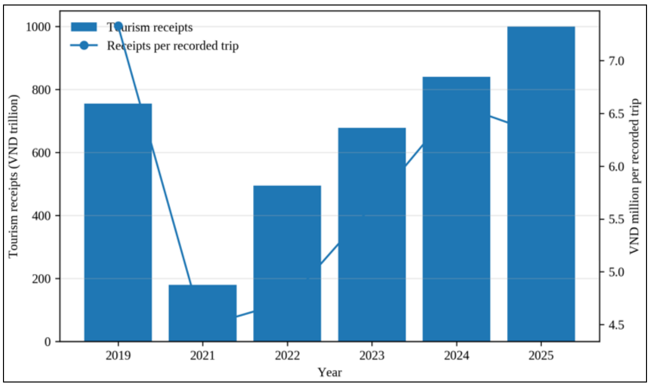
The result confirmed that tourism had largely normalized in scale. Expanded air connectivity, the more open visa regime, destination promotion, and the return of Asian demand were important drivers. South Korea and China accounted for a substantial share of international arrivals, while Taiwan, the United States, Japan, India, Australia, and European markets contributed to diversification. Air travel remained the dominant mode of entry, reinforcing the relationship between tourism performance and airport capacity, route economics, airline competition, and aviation infrastructure.

Economic indicators also strengthened. The World Travel & Tourism Council estimated that the sector's total contribution to Vietnam's GDP and employment was approaching or exceeding pre-pandemic levels, with close to six million jobs supported in 2024 (World Travel & Tourism Council [WTTC], 2024) [26]. Domestic visitor spending was projected above the 2019 level, while international visitor spending was close to full recovery.

Yet 2024 also revealed a competitiveness gap. Vietnam ranked 59th among 119 economies in the WEF Travel & Tourism Development Index. It performed relatively well in price competitiveness, natural and cultural resources, and aspects of safety, but remained behind several Southeast Asian competitors in the broader enabling environment. Tourism service infrastructure, ground and port infrastructure, environmental sustainability, and policy prioritization were areas requiring improvement. The ranking does not negate Vietnam's demand growth; rather, it suggests that strong tourism assets and affordable prices were compensating for weaknesses in infrastructure and management.

Pressure on leading destinations also became more apparent. Congestion, solid waste, wastewater, shoreline development, landscape alteration, and overcrowding affected some coastal, island, urban, and heritage areas. Extreme weather disrupted travel and damaged infrastructure. The geographic concentration of tourism investment and promotion in already established destinations risked widening the gap with emerging areas. Meanwhile, many community-based and rural tourism initiatives lacked professional market access, product design, quality standards, and mechanisms to retain value locally.

The receipts-per-recorded-trip proxy improved in 2024 compared with 2022 and 2023, but the result should be interpreted cautiously. Higher nominal receipts partly reflected inflation and price normalization after pandemic discounts. More importantly, Vietnam still faced a strategic challenge in increasing visitor spending through entertainment, cultural industries, night-time economy, retail, wellness, gastronomy, events, and high-quality local experiences. The country's comparative advantage in affordability can attract demand, but long-term competitiveness requires a stronger value proposition than low price alone.



Source: Author's calculations from official GSO and VNAT indicators. The proxy is descriptive and not equivalent to average spending by a unique visitor

Fig 2: Tourism receipts and a simple receipts-per-recorded-trip proxy

4.6 Record expansion in 2025

Vietnam's tourism sector reached a new scale in 2025. Official figures indicate nearly 21.2 million international arrivals, an increase of 20.4% from 2024 and 17.5% above the 2019 record. Domestic tourist trips reached approximately 137.5 million, while total tourism receipts were around VND 1 quadrillion (VNAT, 2026a, 2026b) [21, 22]. For the first time, all three headline indicators were substantially above their pre-pandemic benchmarks.

The composition of international demand also changed. China returned as the largest source market, followed by South Korea, while Taiwan, the United States, Japan, India, Russia, and Southeast Asian markets contributed to growth. The recovery of China was especially significant because of its pre-pandemic scale and the importance of direct air links, border-gate travel, and package tourism. Growth from India and selected emerging markets demonstrated diversification potential, although absolute volumes remained below those of Northeast Asia.

The 2025 performance was supported by accumulated policy effects. The e-visa regime improved accessibility. Air routes continued to expand. National and local promotion became more active. Large cultural and political anniversaries generated domestic mobility and international attention. New products, events, festivals, entertainment, and destination campaigns increased demand. The recovery of household income and the wider service economy also strengthened domestic tourism.

At the same time, record arrivals intensified long-term policy questions. First, the gap between visitor volume and visitor value remained relevant. Nominal tourism receipts grew strongly, but Vietnam continued to seek higher spending and longer stays. Second, market concentration created exposure to economic conditions, travel policy, and consumer trends in a small number of source countries. Third, environmental and infrastructure pressure increased in destinations already receiving large volumes. Fourth, the rapid expansion of online distribution strengthened access but increased dependence on global digital intermediaries and online reputation. Fifth, labor demand expanded faster than the supply of well-trained workers in some segments.

The sector had therefore moved beyond a recovery problem. By the end of 2025, the central development problem was how to govern growth. The risk of returning to a purely volume-oriented strategy became more serious because record numbers could reduce the political urgency of structural reform. However, the same record also created fiscal space, business confidence, and investment incentives that could be used to improve quality, resilience, and sustainability.

4.7 Interpretation of the five-year trajectory

The five-year evidence supports four broad findings. First, domestic tourism was the primary stabilizer. It recovered earlier than inbound tourism and remained a large source of demand throughout the period. Policies that improve domestic transport, regional products, school-holiday distribution, accessible tourism, and digital information can therefore strengthen resilience even when international markets are performing well.

Second, international access policy matters. The acceleration after 2023 coincided with broader market reopening, greater air capacity, and a more competitive visa regime. Visa reform did not act alone, but it reduced a clear administrative disadvantage. Future reforms should be assessed through length of stay, spending, repeat visitation, and route development rather than arrivals alone.

Third, receipts recovered faster than international arrivals after 2023, but nominal revenue does not necessarily imply an equivalent improvement in productivity or local value retention. Better tourism accounting is needed to separate price effects, international and domestic spending, regional distribution, and leakage through imported inputs or foreign platforms.

Fourth, recovery in demand exceeded improvement in enabling conditions. The TTDI ranking, labor shortages, environmental pressure, uneven service infrastructure, and fragmented destination governance indicate that Vietnam's tourism assets and price competitiveness are generating strong demand despite structural constraints. This creates both an opportunity and a warning. If constraints are addressed, Vietnam can move toward higher-value tourism. If they are not, congestion, environmental degradation, weak service consistency, and low margins may limit the benefits of continued growth.

Table 3: Persistent structural constraints after the recovery of visitor volume

Dimension	Evidence from 2021–2025	Development risk	Policy response
Value creation	Receipts recovered, but the simple receipts-per-trip proxy remained below 2019 and nominal values include price effects	Volume growth may coexist with short stays, low margins, and leakage	Track visitor-day expenditure, length of stay, local procurement, and value retention
Market structure	Inbound growth remained concentrated in major Northeast Asian markets	Exposure to source-market and aviation shocks	Diversify long-haul and emerging markets while retaining core markets
Infrastructure and governance	Demand expanded faster than destination services, transport integration, and coordination in some locations	Congestion, inconsistent quality, and weak visitor-flow management	Strengthen destination management organizations and readiness assessments
Human resources	Pandemic-related labor exit created recruitment and skill gaps	Service inconsistency and reduced productivity	Improve career pathways, training co-financing, job quality, and management skills
Environment and climate	Coastal, island, heritage, and urban destinations face waste, water, weather, heat, erosion, and crowding pressures	Asset degradation and higher disruption costs	Apply carrying-capacity tools, climate-risk screening, standards, and resilient infrastructure
Data and digital systems	Annual headline indicators are stronger than granular expenditure, satisfaction, platform, workforce, and environmental data	Policy may optimize what is easy to count rather than what creates public value	Build interoperable tourism data architecture, destination observatories, and evaluation standards

Source: Author's synthesis of official statistics, international benchmarks, and peer-reviewed studies.

5. Discussion

Vietnam's recovery was faster than early pandemic projections suggested. Vu *et al*. (2022) [23] considered that full recovery might require several years, depending on health conditions and the effectiveness of coordinated strategies. The 2021–2025 evidence confirms both the severity of the initial shock and the sector's adaptive capacity. Domestic demand, business improvisation, public-health normalization, market reopening, visa reform, air connectivity, and destination promotion combined to restore activity. By 2025, Vietnam had not simply returned to the 2019 scale; it had exceeded it.

The recovery also supports the resilience literature's emphasis on diversification and institutional response. Domestic tourism reduced dependence on closed international borders. Digital platforms enabled firms to communicate with customers, redesign products, and distribute services. Government decisions on reopening and visas improved market access. Enterprises adjusted pricing, staffing, and product formats. Localities developed new festivals, night-time activities, community tourism, and nature-based experiences. These changes illustrate adaptive resilience rather than a mechanical return to pre-pandemic operations.

However, the evidence also reinforces the distinction between recovery and transformation. The sector recovered largely through the reactivation of established destinations, source markets, and business models. A substantial share of inbound growth remained concentrated in Northeast Asian markets. Coastal and urban destinations continued to attract much of the investment and demand. Price competitiveness remained a major advantage. These patterns are commercially rational, but they can reproduce pre-existing weaknesses, including spatial concentration, low margins, seasonality, environmental stress, and vulnerability to external market changes.

The domestic market deserves particular attention. Its expansion from 85 million trips in 2019 to 137.5 million in 2025 indicates a structural increase in travel participation. Rising incomes, expressway expansion, private vehicle ownership, low-cost aviation, digital booking, and social-media influence have enlarged the market. Domestic tourists are no longer only a crisis substitute; they are a permanent strategic segment. Nevertheless, domestic demand is often concentrated in weekends, holidays, and summer months, producing congestion and price volatility. Policies should encourage off-peak travel, thematic routes, secondary destinations, rail and road tourism, and events distributed across the year.

International recovery demonstrates the benefits of reducing entry barriers. The 90-day e-visa and 45-day visa-exempt stay improved the conditions for longer and multi-destination travel. Yet visa policy remains only one element of competitiveness. Travelers also evaluate flight price and convenience, immigration processing, local transport, digital payment, destination information, safety, cleanliness, service quality, and the availability of distinctive experiences. Vietnam's challenge is to ensure that improved access leads to deeper consumption of local culture and services rather than only a higher number of short, low-cost visits.

The environmental dimension is increasingly urgent. Tourism growth depends on beaches, islands, heritage landscapes, biodiversity, cultural identity, and liveable cities. Floods, storms, coastal erosion, heat, air pollution, water stress, and waste can damage both community welfare and destination reputation. Climate adaptation should therefore be integrated into tourism investment appraisal, resort planning, heritage conservation, transport, building standards, insurance, and emergency communication. Green labels and voluntary campaigns are useful but insufficient without enforceable standards, monitoring, and public infrastructure.

The labor issue also requires structural interpretation. The pandemic did not merely create a temporary shortage; it revealed weaknesses in career pathways, wages, social protection, training quality, and employer investment in skills. Tourism relies on interpersonal service, local knowledge, language ability, safety, and problem-solving. Digital tools can improve productivity, but they cannot substitute for all dimensions of hospitality. A high-value tourism strategy must therefore include better jobs, not only more jobs.

Finally, the statistical system has not fully kept pace with the scale and complexity of the sector. Annual arrival and receipt indicators are essential but insufficient for destination management. Policymakers need timely information on length of stay, expenditure categories, visitor satisfaction, repeat visits, carbon intensity, water and waste pressure, accommodation performance, workforce conditions, platform dependence, and resident attitudes. Without such data, policy may continue to prioritize indicators that are easy to count rather than outcomes that matter most.

6. Policy Implications

6.1 Move from arrival targets to a balanced tourism performance framework

Table 4: Proposed performance framework for the next stage of Vietnam's tourism development

Policy objective	Selected indicators	Lead policy instruments	Expected outcome
Increase value per visitor	Spending per visitor-day; length of stay; repeat rate; local procurement	Product development, cultural and creative industries, events, gastronomy, wellness, night-time economy	Higher revenue and stronger local multiplier effects
Improve spatial and seasonal balance	Regional distribution; off-peak share; congestion measures	Regional routes, event calendars, pricing, timed entry, secondary-destination readiness	Reduced pressure and wider distribution of benefits
Raise service productivity	Labor productivity; certified skills; retention; satisfaction	Training funds, occupational standards, career pathways, digital tools	More consistent quality and better tourism jobs
Strengthen resilience	Market concentration; route diversity; crisis readiness; business continuity	Visa-aviation coordination, contingency plans, enterprise finance, domestic-market strategy	Lower exposure to future shocks
Protect environmental assets	Water, waste, energy, emissions, biodiversity, climate risk	Standards, monitoring, climate finance, resilient infrastructure, carrying-capacity management	Long-term destination competitiveness and community welfare
Modernize evidence and governance	Timeliness, interoperability, policy evaluation, resident sentiment	Tourism satellite accounts, visitor expenditure surveys, open data, destination observatories	More accountable and adaptive policy

Source: Author's policy framework derived from the analysis

National and local plans should retain visitor targets but place them within a broader scorecard. Core indicators should include average length of stay, spending per visitor-day, repeat visitation, seasonality, visitor satisfaction, resident satisfaction, tourism labor productivity, local procurement, environmental pressure, and the share of tourism income retained within destinations. This would reduce incentives for localities to pursue volume without considering infrastructure capacity or community benefit.

A balanced framework should distinguish international and domestic segments. Domestic tourism requires measures of trip frequency, regional distribution, transport mode, and off-peak demand. Inbound tourism requires detailed expenditure and market data. The framework should also recognize different destination types. Carrying-capacity concerns in heritage cities and islands are not identical to the market-access challenges of rural or mountainous destinations.

6.2 Continue access reform while linking visas to aviation and market strategy

The 2023 visa reform contributed to a more competitive entry regime and should be treated as the foundation for further improvement. Vietnam should regularly evaluate the list and duration of unilateral visa exemptions, e-visa processing quality, border-gate coverage, immigration waiting time, and communication in major languages. Decisions should be guided by potential length of stay, spending, air connectivity, business travel, and strategic market diversification.

Visa policy should be coordinated with aviation policy. Priority markets require sufficient direct flights, competitive airport charges, efficient slots, route-development support, and smooth transfers. Long-haul connectivity is particularly important for Europe, North America, Australia, and emerging high-spending markets. Regional airports can help distribute visitors beyond Hanoi and Ho Chi Minh City, but route incentives should be tied to realistic demand, environmental standards, and destination readiness.

6.3 Develop high-value products and strengthen local value chains

Vietnam should shift from a broad catalogue of attractions toward integrated experiences that generate longer stays and local spending. Priority product groups include cultural and creative tourism, gastronomy, wellness and medical tourism, marine and island tourism, nature-based tourism, meetings and events, golf, sports, educational travel, railway tourism, river tourism, and carefully managed night-time economy activities. Product design should combine accommodation, interpretation, mobility, retail, food, entertainment, and community participation.

Cultural resources should be used with stronger interpretation and conservation. Museums, heritage sites, craft villages, performance arts, architecture, memory sites, and festivals can create value when they are professionally curated, multilingual, accessible, and linked to local creative industries. Gastronomy should be developed not only as restaurant consumption but as markets, food trails, cooking experiences, agricultural visits, certification, and storytelling.

Local supply chains are essential for retaining value. Hotels, resorts, cruise services, events, and tour operators should be encouraged to procure local food, crafts, cultural services, and transport where quality and safety standards can be met. Support programs should help small producers meet procurement requirements, improve packaging, use digital payment, and participate in online distribution. Community-based tourism should avoid symbolic participation; communities need clear rights, skills, revenue-sharing mechanisms, and influence over visitor management.

6.4 Reform destination governance and manage spatial concentration

Tourism development crosses administrative and sectoral boundaries, yet destination governance is often fragmented. Vietnam should strengthen destination management organizations or equivalent coordination mechanisms with participation from local government, enterprises, communities, transport operators, cultural institutions, and environmental agencies. These bodies should be responsible for destination strategy, data, branding, event calendars, visitor flows, crisis plans, service standards, and resident engagement.

Spatial concentration can be reduced through regional routes and infrastructure connecting established gateways with secondary destinations. However, dispersal should not mean replicating mass-tourism models in environmentally or culturally sensitive areas. Destination readiness assessments should precede large-scale promotion. Such assessments should examine access, sanitation, water, waste, emergency services, local consent, workforce capacity, ecological limits, and the ability of local businesses to capture benefits.

For crowded destinations, management tools may include timed entry, advance booking, differentiated pricing, visitor caps in sensitive zones, restrictions on vehicle access, public transport, pedestrianization, cruise scheduling, and real-time information. The goal is not to suppress tourism but to protect experience quality and resident welfare.

6.5 Build a productive, professional, and secure tourism workforce

Workforce policy should address the causes of labor exit exposed during the pandemic. Training institutions and enterprises need closer collaboration on occupational standards, curricula, internships, digital skills, foreign languages, sustainability practices, safety, and management capability. Short courses can solve immediate gaps, but long-term productivity requires recognized career pathways and continuous professional development.

Small tourism enterprises often lack resources for training. Public co-financing, sectoral training funds, shared digital learning, and local training centers can reduce this constraint. Managers need skills in revenue management, data use, online distribution, risk management, product innovation, and environmental compliance. Frontline workers need customer service, communication, accessibility awareness, first aid, and knowledge of local culture.

Improved job quality is equally important. More stable contracts, transparent service charges, social insurance, safe working conditions, accommodation support in high-cost destinations, and opportunities for advancement can improve retention. Tourism policy should consider workforce resilience as infrastructure: Without skilled and motivated workers, physical investment cannot produce a high-quality visitor experience.

6.6 Create an integrated tourism digital and data infrastructure

Vietnam has made progress in e-visas, digital promotion, online booking, cashless payment, and smart-destination applications, but systems remain fragmented. A national tourism data architecture should establish common standards for accommodation reporting, attractions, visitor flows, events, transport, and business registration. Data should be interoperable across national and local agencies while respecting privacy and cybersecurity requirements.

Public digital infrastructure should not attempt to replace private platforms. Its role is to provide trusted destination information, open data, identity and payment connectivity, emergency communication, and analytical capacity. Application programming interfaces can allow enterprises to build services on verified public data. Small businesses should receive support for digital listings, multilingual content, customer relationship management, cybersecurity, and direct booking so that they are not entirely dependent on global intermediaries.

Data governance also requires clarity regarding ownership, access, quality, and accountability. Aggregated mobile, payment, transport, and platform data can improve visitor-flow analysis, but public-private arrangements must protect personal information and ensure that data support public objectives rather than only commercial interests.

6.7 Place climate resilience and environmental capacity at the center of investment

Tourism investment decisions should include climate-risk screening and lifecycle environmental costs. Coastal resorts, islands, river destinations, and mountain areas require location-specific assessments of flooding, erosion, heat, water availability, biodiversity, and emergency access. Building codes, drainage, shoreline management, insurance, evacuation planning, and restoration of natural buffers should be strengthened.

Environmental standards should cover wastewater, solid waste, plastics, energy efficiency, water use, construction density, landscape protection, and biodiversity impacts. Certification can support market differentiation, but monitoring and enforcement are necessary to prevent greenwashing. Public infrastructure is especially important because individual enterprises cannot solve destination-level waste or water problems alone.

A tourism climate fund or dedicated financing window could support energy efficiency, renewable energy, water recycling, low-emission transport, heritage adaptation, ecosystem restoration, and small-business compliance. Financing should reward measurable outcomes. Tourism promotion should also communicate responsible visitor behavior and direct demand toward certified products and less congested periods.

6.8 Strengthen tourism statistics, research, and policy evaluation

Vietnam should further develop Tourism Satellite Accounts and subnational tourism accounts to measure direct and indirect economic contribution, employment, and value retention. Regular visitor expenditure surveys should provide comparable data by market, destination, trip purpose, accommodation type, and spending category. Domestic tourism measurement needs particular improvement because repeated trips, day visits, and self-organized travel are difficult to capture.

Policy evaluation should be built into major initiatives. Visa reforms, route incentives, promotion campaigns, festivals, tourism zones, and digital platforms should have baseline indicators, target outcomes, and transparent evaluation. This would allow resources to move toward interventions that increase value, diversification, or sustainability rather than only media visibility.

Universities and research institutes can support destination observatories that combine official statistics, enterprise data, resident surveys, environmental monitoring, and visitor feedback. Public release of anonymized data would improve independent research and policy debate. Better evidence is essential because the next stage of tourism development involves trade-offs among growth, conservation, infrastructure, community welfare, and fiscal priorities.

6.9 Improve coordination and implementation discipline

Many of the required policies already appear in national strategies and resolutions. The main challenge is implementation across ministries, provinces, and business networks. A clear division of responsibilities, measurable milestones, and regular public reporting would improve accountability. Tourism priorities should be integrated with transport, urban planning, culture, environment, agriculture, education, health, digital transformation, and regional development.

Interprovincial cooperation is particularly important for tourism routes and shared ecosystems. Visitors experience destinations across administrative borders, while watersheds, coastlines, transport corridors, and cultural regions are also interconnected. Joint planning, data sharing, common standards, and coordinated calendars can reduce duplication and create stronger regional products.

The private sector and communities should participate early in policy design rather than only during implementation. Consultation improves feasibility and legitimacy, while transparent rules reduce uncertainty for investors. The recovery period demonstrated that tourism outcomes depend on coordinated action. Institutionalizing that coordination is necessary for future resilience.

7. Conclusion

Vietnam's tourism development during 2021–2025 followed an extraordinary path from near-closure to record growth. International arrivals increased from approximately 157,300 in 2021 to nearly 21.2 million in 2025. Domestic tourist trips rose from 40 million to 137.5 million, and nominal tourism receipts expanded from VND 180 trillion to around VND 1 quadrillion. Domestic demand stabilized the sector, the 2022 reopening restored commercial activity, the 2023 visa reform and regional reopening accelerated inbound recovery, and the expansion of air connectivity and destination promotion supported record results in 2025.

The recovery is a major achievement, but it should not be interpreted as completion of the development agenda. Vietnam continues to face a gap between demand performance and enabling conditions. Service infrastructure, destination governance, human resources, environmental management, digital data, market diversification, and value creation have not advanced uniformly with visitor volume. Climate risks and congestion increase the cost of postponing reform.

The policy objective for the next period should therefore change from restoring tourism to governing tourism growth. Success should be measured not only by arrivals but by length of stay, spending, local income retention, workforce quality, resident welfare, environmental condition, regional distribution, and resilience. Continued visa and aviation reform can sustain access, but higher-value products, professional destination management, better jobs, integrated digital infrastructure, climate-resilient investment, and stronger tourism statistics will determine whether growth produces durable national and local benefits.

The 2021–2025 period showed that Vietnam's tourism system can adapt quickly under severe pressure. The next test is whether the country can use that recovery momentum to build a tourism economy that is more valuable, inclusive, competitive, and environmentally secure.

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