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Conference Proceedings

**Nemzetközi tudományos konferencia
a Magyar Tudomány Ünnepe alkalmából**
International Scientific Conference
on the Occasion of the Hungarian Science Festival

Sopron, 2022. november 3.
3 November 2022, Sopron

**TÁRSADALOM – GAZDASÁG – TERMÉSZET:
SZINERGIÁK A FENNTARTHATÓ FEJLŐDÉSBEN**

SOCIETY – ECONOMY – NATURE: SYNERGIES IN SUSTAINABLE DEVELOPMENT

Szerkesztők / Editors:

OBÁDOVICS Csilla, RESPERGER Richárd, SZÉLES Zsuzsanna, TÓTH Balázs István

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Impact of COVID-19 Pandemic on Tourism Sector in Vietnam

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Abstract

The tourism industry contributes significantly to the growth of the national economy, making it a leading industry in many nations across the world. With a focus on investment and a favorable impact on the expansion of the entire economy, tourism is currently one of the three main economic sectors in Vietnam. In 2015, the tourism industry contributed 6.3% directly to the GDP; its contribution peaked in 2019 at 9.2%. However, one of the industries most vulnerable to the epidemic is tourism. Vietnam's tourism industry has been severely impacted by the Covid-19 pandemic, leading to a sharp decline in tourists (international visitors in 2020 only reached 3.8 million arrivals, a decrease of 78.7% compared to 2019, domestic tourists also fell by nearly 50%, and the tourism sector's share of GDP decreased by 3.58% (in 2020) and 1.97% (in 2021). Additionally, 90% of businesses in the tourism industry were severely impacted; 40% of jobs in the industry were lost, and laborers' pay was 40% lower than it was before to the Covid-19 pandemic. The purpose of this study is to assess and analyze the current state of Vietnam's tourism industry both before and after the COVID-19 pandemic. The paper also focuses on examining the effects and reactions of the tourism sector in order to provide suitable, modified methods for future sustainable tourism development.

Keywords: Tourism, enterprises, Covid 19 pandemic, Vietnam

JEL Codes: I39, L83, O5, I15

1. Introduction

Tourism is a broad economic sector that is becoming increasingly important in socio-economic development. Tourism is one of Vietnam's three key economic sectors, focusing on investment, constant development, and making positive contributions to the national economy, such as contributing more than 9.2% of the national GDP and creating 2.9 million jobs, including 927 thousand direct jobs. The tourism industry grew at a rapid pace of 22.7% between 2015 and 2019. The world has praised Vietnam's tourism achievements and efforts; the World Tourism Organization (UNTWO) ranked Vietnam sixth among the ten countries with the fastest tourism growth in the world. In 2019, Vietnam tourism also won many prestigious awards of continental and world stature (General Statistics Office, 2020).

However, it's also believed that one of the industries most vulnerable to the epidemic is tourism (Chen et al., 2007). Early in 2020, the Covid-19 infection (also known as SARS-CoV-

2) became a serious global pandemic with the worst severity in the previous 100 years. One of the industries that will likely be most impacted is tourism. Many nations have devised quick fixes to save their economies in the face of a catastrophic global epidemic, like decreasing interest rates, providing company bailout packages, boosting spending, etc (General Statistics Office, 2022). The Vietnamese government has also moved swiftly to develop plans for particular legislation and assistance programs for firms, especially those in the tourism sector. The pandemic scenario has, however, had a significant negative impact on Vietnam's economic situation; specifically, there were 2.3% fewer newly registered firms in 2020 than there were in 2019 and 13.9% more businesses stopped operations while awaiting the start of dissolution processes, suspended operations for a set period, or completed such procedures (General Statistics Office, 2020). Most of the enterprises had to suspend their business and have dissolved their activities in the field of commerce and services; Larger firms withdraw from the market more. In particular, the extent of the epidemic's impact on the tourism industry is increasingly extensive and long-term. Therefore, more recent and thorough evaluations and analyses of the effects of the Covid-19 outbreak on the travel and tourism sector in Vietnam are required. To take a methodical and strategic response to a long-term issue like the Covid-19 pandemic, it is also necessary to specifically examine the Covid-19 epidemic's evolution and impact scenarios in the tourism sector.

This study attempts to assess and analyze the current state of Vietnam's tourism industry both during and before the COVID-19 pandemic. The paper also focuses on examining the effects and reactions of the tourism industry to provide suitable, modified methods for future sustainable tourism development. Next, the study proposes directions for tourism development of Vietnamese tourism enterprises in the post-Covid pandemic.

2. Literature review

2.1. Define tourism

Nowadays tourism has become a popular socio-economic phenomenon. The International Travel Association has recognized tourism as the largest economic sector in the world, surpassing automobile manufacturing, electronic steel, and agriculture. Therefore, tourism has become a spearhead economic sector of many countries around the world. The definition of tourism has also become quite common and varied, according to different approaches. Tourism is associated with rest and entertainment, but due to different circumstances, times, and regions, under different research angles, the concept of tourism is not the same:

To facilitate comparisons between worldwide data, the League of Nations (LON) published the first official definition of "tourist" in 1937 (Cunha, 2012). In order to do this, the term "tourist" was then used to describe someone traveling for a minimum of 24 hours in a nation other than their home country. The LON's Council decided to list the kinds of persons regarded to be tourists and those who were not in order to make the notion more widely applicable (IUOTO, 1973), although they did not impose a maximum time limit for the journey.

However, it is crucial to emphasize the UNWTO's "official" notion, which is the one that is currently most widely used "tourism comprises the activities of persons traveling to and staying in places outside their usual environment, for not more than one consecutive year, for leisure, business, and other purposes" (United Nations, 1994). It should be noted that this notion relates to both "tourists" and "same-day visitors," and that it encompasses both international and domestic travel. The UN emphasizes that the motivations (purposes) it refers to are not those of persons who decide to travel, but rather those of those who select the particular location or nation visited, classifying these motivations into 1. Leisure, recreation, and holidays; 2. Visiting relatives and friends; 3. Business or professional; 4. Health treatment; 5. Religion, pilgrimage; 6. Others.

The primary characteristics of tourism fit into a set of characteristics of a service offering. The four characteristics are the following: instability, impermanence, diversity, and unity (Ventura-dias, 2011; Lölke et al., 2018). The expansion of the tourism industry may have a favorable impact on economic growth because tourism is a significant contributor to economic development in the global economy. Many earlier researchers have thought about the important role that the tourist sector plays in economic development (Gamage et al., 2020). The World Tourism Organization (WTO) claims that one of the main factors promoting economic growth is tourism. The greatest foreign exchange, job prospects, and revenue-generating potential are provided by tourism for economic growth (Steiner, Planning et al., 2006). According to Gamage, tourism is the sector with the quickest rate of growth in both developed and emerging nations. Tourism is also regarded as the economy's main source of employment opportunities and top revenue generator (Gamage et al., 2020).

2.2. Impact of the epidemic on the global tourism industry

Nearly all nations' economic development was severely hampered by the COVID-19 epidemic. It led to the biggest economic collapse in history. The predicted value of tourism's economic contribution in 2021 (measured in terms of tourist direct gross domestic product) is US\$1.9 trillion, up from US\$1.6 trillion in 2020 but still much below the US\$3.5 trillion pre-pandemic level (UNWTO, 2022). The spread of COVID-19 also caused the economies of more developed nations, including the USA, UK, Japan, and Europe to collapse. Due to measures are taken to stop the virus from spreading further, including the lockdown policy, travel restrictions, supply chain problems, and low demand, the economy has performed poorly. These limitations can put a strain on global economic expansion. According to the International Labor Organization (ILO), the COVID-19 pandemic will result in an increase in unemployment of 5.3 million to 24.7 million people worldwide (ILO, 2020). As a result, economic activity declines, and jobs are lost. The COVID-19 outbreak has had an influence on all economic sectors, including manufacturing, tourism, finance, insurance, trade, transportation, and people in all occupations in all nations experiencing increasingly severe economic shocks. Due to the uncertainty and dread of the pandemic, most businesses are more likely to experience low earnings because individuals are urged to stay at home, events are canceled and travel is prohibited, and big gatherings are not permitted (Hoque et al., 2020). Demand and supply shocks from the COVID-19 pandemic generate abrupt economic disruptions in practically every economic sector (El-Erian, 2020).

The COVID-19 pandemic is more likely to have an impact on the tourism industry (Shretta, 2020). The world's tourism industry contributes more than 10% of the global GDP and 30% of services exported globally (World Bank, 2017). Among all economic sectors, the tourism industry is one that has the most economic impact because of numerous travel restrictions, travel bans, airport closures, and mass passenger cancellations that are enacted by various governments. As a result, the COVID-19 epidemic cost the global tourism industry about US\$ 820 billion in lost income (Ozili and Arun, 2020). Additionally, the stay-at-home and social withdrawal rules imposed by the majority of governments, as well as booking cancellations, which may result in costs of up to US\$ 150 billion globally, have had a significant negative impact on the hotel sector. According to Hoque, the coronavirus had a major impact on the Chinese travel and tourism sector (Hoque et al., 2020). The COVID-19 pandemic delayed the majority of foreign visitors to China, severely harming the country's tourism business, which typically generates enormous revenues (Aljazeera, 2020). Additionally, it was disclosed how well hotels, bars, restaurants, and other travel businesses were affected.

The economic and tourist sectors have been studied in relation to previous outbreaks. According to past research, these pandemics have a far smaller effect than the COVID-19 outbreak in 2020. H1N1 flu, SARS, the HIV/AIDS pandemic, the Ebola and Zika viruses, and now COVID-19, are major epidemics and pandemics that have had an impact on the global economy. Globally, these pandemics and epidemics cause enormous economic losses. Due to its six-month impact on international air travel, the SARS outbreak had the greatest impact on the tourism sector (IATA, 2020).

However, compared to other recent pandemics, the COVID-19 outbreak may have significantly bigger effects. In 2021, total export profits from international tourism—including receipts from passenger transportation—amounted to US\$ 728 billion, a real-term rise of 4% from 2020, but a decline of 61% from 2019, when export revenues exceeded US\$ 1.7 trillion. This comes after a 63% decline in 2020, the pandemic's first year. As a result, the overall loss in tourism-related revenue for 2020 and 2021 exceeds US\$ 2 trillion. This has ten times the financial impact on the world as the SARS pandemic did (Shretta, 2020). In light of this, it can be said that the COVID-19 outbreak, in contrast to earlier pandemics and outbreaks around the world, is predicted to have a significant negative influence on global tourism.

The decline of the tourism sector may have devastating effects on employment and income from the supply chain. Countries that depend on tourism a lot may have big drops in their GDP and job market. The tourist sector primarily consists of the following subsectors: health, finance, construction, trade, aviation, lodging, food and beverage, transportation, and communication. Therefore, the loss of the tourism sector has a negative effect on all of these subsectors (UNCTAD, 2020). The WTTC (2020) expects that the tourist industry will recover less quickly than other economic sectors because it took more than 19 months for it to bounce back from prior pandemics (Gössling, Scott et al., 2020).

Based on the previously described theoretical and empirical data about COVID-19 and the tourism industry, the study's main argument might be formed as follows: The COVID-19 epidemic has been most frequently connected to every nation in the world as a catastrophic economic shock. Travel restrictions, social segregation, and quarantine policies—common features of large nations—put international tourism in the most perilous situation during the epidemic. In this sense, it is possible to identify the tourism industry as the one that has been most significantly and adversely impacted by the unexpected economic shocks in several nations, including Vietnam. This study, therefore, focuses on examining the effects and reactions of the tourism industry in order to provide suitable, modified methods for future sustainable tourism development. The research then suggests ways that Vietnamese tourism businesses can grow in the post-Covid pandemic.

3. Data and methodology

Desk research was used to conduct analyses, come to findings, and meet study goals on the pandemic crisis' effects on Vietnam's tourism businesses (the acceptable research method represents the kind of quantity approaches taking the source of information into account). This review used secondary data for analysis.

- *Research question:* As the first step of the secondary research, the study developed a research question; “What is the impact of the COVID-19 outbreak on the tourism sector in Vietnam?”
- *Data collection and processing:* Data on Vietnam's tourism industry (the number of visitors, revenue, expenditures, GDP growth, and employment rate) were collected during the epidemic-free period (between 2015 and 2021) and the epidemic period (between 2020 and 2021) from Vietnam National Administration of Tourism (VNAT), the General

Statistics Office (GSO), and Ministry of Culture, Sports and Tourism (MCST). The Ministry of Health provided the number of confirmed COVID-19 cases from 2020 to December 2021 (MOH). After collecting data, it is classified, aggregated, cleaned, and entered into Excel software to calculate the necessary criteria and draw illustrative charts.

- *Data analysis:* The study used descriptive statistics and comparative analysis to see the fluctuations of the analytical criteria.

4. Research findings

This section highlights the most important results regarding the potential for tourist development in Vietnam. In addition, the overall effects that the COVID-19 pandemic has had on the tourism industry in Vietnam, in particular the impact that the pandemic has had on various aspects of the tourism business and that of tourism enterprises, as well as the overall response of businesses in dealing with the pandemic.

4.1. Overview of Vietnam tourism

Vietnam's tourist industry is ripe for growth thanks to the country's advantageous location, climate, and natural circumstances. These advantages include a temperate climate, abundant greenery, and a lengthy coastline. Vietnam's tourism is considered a spearhead economic sector because Vietnam has rich and diverse tourism potential.

4.1.1. Tourism potential of Vietnam

Vietnam boasts a wealth of tourist attractions, including historical sites that are part of the World Heritage List, traditional temples and handicraft villages, scenic natural landscapes, and ethnic settlements on varied geographical features (plain, coastal, and mountain areas). Many efforts are being done right now to redirect tourist traffic to new tourist resources in addition to popular tourist locations. These attractions can be divided into the following groups:

Vietnamese Heritage: By 2020, Vietnam will have over 41,000 monuments and landscapes, more than 4,000 of which will be designated as national monuments and more than 9,000 of which will be ranked at the province level. In 11 provinces in the Red River Delta, which together account for nearly 56% of Vietnam's relics, the density and quantity of relics are at their highest (Vietnam Ministry of Foreign Affairs, 2018). Vietnam also has 117 museums, of which 38 are managed by ministries and branches and 79 are by municipalities.

Tourist attraction: UNESCO has recognized Vietnam for its eight world biosphere reserves, 400 hot springs ranging in temperature from 40 to 120 degrees, and national parks. Due to the concentration of several limestone mountains in the northern portion of the nation, Vietnam's caves are mostly found there. Vietnamese caves are typically found in limestone mountains with highly developed karst landscapes. Having 125 beaches, the majority of which are stunning, Vietnam is ranked 27th out of 156 countries with seas in the globe. Ha Long Bay and Nha Trang Bay are two of the world's most picturesque bays, and Vietnam ranks twelfth among those nations (Vietnam Ministry of Foreign Affairs, 2018).

UNESCO awards: Vietnam has received UNESCO accolades for several things, including world heritage sites, biosphere reserves, documentary heritage, global geological parks, and the intangible cultural heritage of humanity. World heritage is the oldest and most prestigious prize in the UNESCO system. Vietnam was awarded nine global biosphere reserves and thirteen intangible cultural heritage designations by UNESCO in 2019 (Vietnam Ministry of Foreign Affairs, 2018; Viet Nam Que Huong Toi, 2021).

Vietnamese festivals: As of 2009, there were 7,966 festivals held in Vietnam, of which 7,039 were folk celebrations (representing 88.36%), 332 were historical celebrations (representing 4.17%), and 595 were religious celebrations (representing 7.47%).

ting 4.16%), 544 were religious celebrations (representing 6.28%), 10 were celebrations brought in from abroad (representing 0.12%), and the remaining 0.5% were other celebrations. Vietnam will have 28 festivals on its list of national intangible cultural assets by the end of 2014 (Vietnam Ministry of Foreign Affairs, 2018).

4.1.2. Tourist areas and tourist centers

Vietnam is already a popular travel destination worldwide. Tourism-related spending and earnings have been expanding rapidly for years, significantly boosting the nation's GDP growth (9.2% in 2019). Vietnam's position in the process of growth and global integration has been strengthened by the preservation and promotion of the value of its natural resources and cultural heritage. Vietnam is a nation with a broad and abundant tourist potential and numerous strengths across the nation (Figure 1).

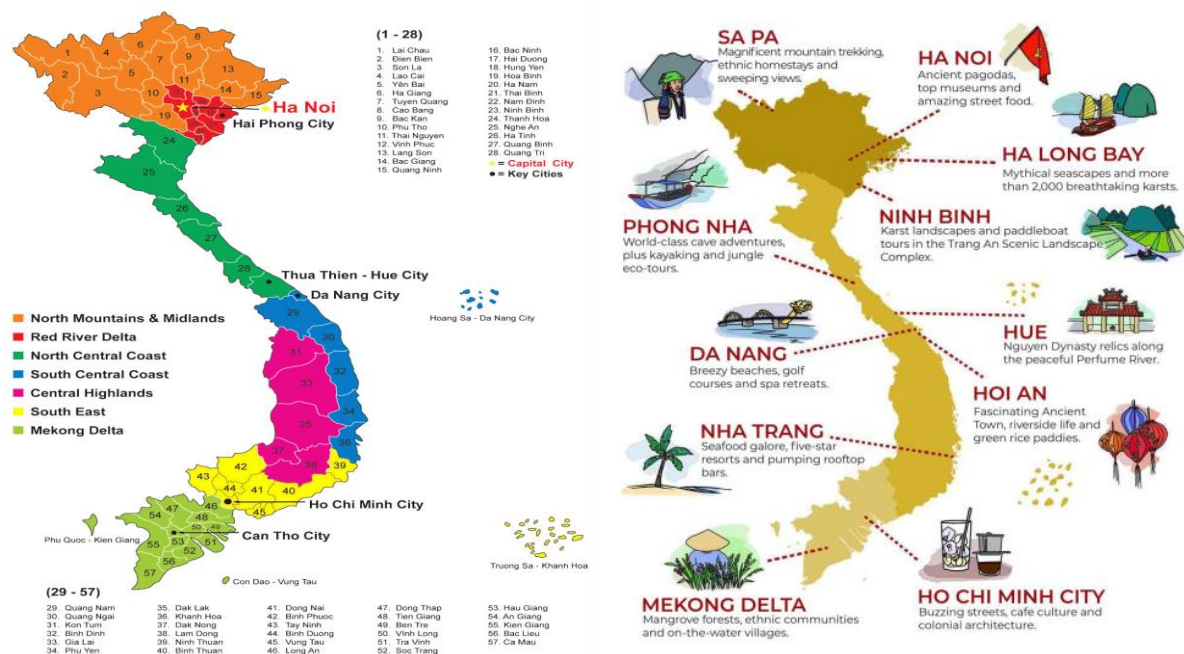


Figure 1: Vietnam tourist attractions
Source: Amo Travel Team (2018)

Vietnam has 24 tourist attractions spread throughout 7 tourist regions:

North mountains and midlands: The terrain is mainly midland and mountainous areas, so the difference in climate by altitude is relatively clear. To develop resort and discovery tourism with Fansipan peak, O Quy Ho pass, and Hoang Lien Son national park. At the same time, promote the exploitation of cultural tourism in villages and border gate tourism in Lao Cai.

The Red River Delta: In the tourist areas of Vietnam, the Red River Delta region has diverse natural conditions, with a tropical monsoon climate, divided into four distinct seasons, creating beautiful natural landscapes. In addition, this place also preserves many attractive historical and cultural relics. In particular, in this area, there is Ha Long Bay - one of the 7 natural wonders of the world and many other beautiful beaches. The most ideal time to explore the Red River Delta and Northeast Coast in the list of Vietnam tourist areas is around April - August (summer).

North Central Coast: In the tourist areas of Vietnam, the North Central region has full mountainous terrain, plains, and coastal areas; At the same time, there are many beautiful historical sites such as Hue Ancient Capital, Ho Dynasty Citadel.

South Central Coast: Possesses many beautiful beaches and a tropical climate characterized by two distinct rainy and dry seasons. This place is likened to the island paradise of Vietnam with many of the most beautiful beaches such as Vinpearl Nam Hoi An, Ba Na Hills, Asia Park - Asia Park, etc. In particular, the South Central Coast is also the only tourist area in Vietnam tourist areas where visitors can experience sand dunes and sub-deserts in the middle of the S-shaped strip of land.

Central Highland: In the tourist areas of Vietnam, the Central Highlands has a typical tropical savanna climate that is cool all year round and the unique "sunshine" has turned this place into a paradise for relaxation and travel experiences. Visitors can come to this tourist area of Vietnam at any time of the year.

South-east region: The sub-equatorial monsoon tropical climate is divided into two distinct rainy and dry seasons, with an average annual temperature of about 25°C, which is a favorable condition for the development of marine tourism. Where visitors can experience eco-tourism, river tourism, cultural and historical relic tourism, and discovery tourism in the same place.

Mekong Delta: In the tourist areas of Vietnam, the Mekong Delta has a dense canal system, visitors coming here will be completely impressed by the unique culture of this Vietnamese tourist area. Garden tourism, eco-tourism, and floating market discovery - are one of the most unique forms of the market in Vietnam. In the tourist areas of Vietnam, coming here, visitors will experience traditional craft village tourism or enjoy unique local specialties (Viet Nam Que Huong Toi, 2021)

Table 1: Most popular destinations in Vietnam

City	Tourists	Rank	Change
<i>Ho Chi Minh</i>	8,208,000	#30	+14.0%
<i>Ha Long</i>	6,247,900	#42	+18.0%
<i>Ha Noi</i>	5,132,300	#51	+9.5%
<i>Da Nang</i>	2,880,800	#83	+15.0%

Source: Worlddata (2022)

Four Vietnamese cities are among the top 100 tourist destinations in the world. With 8.21 million visitors in 2019, Ho Chi Minh City climbed to the thirtieth spot. All foreign visitors who spent at least one night in the country were counted, according to Euromonitor.

4.2. Impact of the COVID-19 pandemic on the tourism sector in Vietnam

The effects of the COVID-19 pandemic on the tourism sector, such as visitor numbers, revenue, and other metrics, have been the subject of mixed research findings.

4.2.1. Impact on tourists

Vietnam is “one of the most dynamic emerging countries in East Asia”. Over the past years, the tourism and travel industry has significantly increased its contribution to Vietnam's GDP from 6.3% in 2015 to 9.2% in 2019 (Statista, 2022). With this contribution and relationships with other industries such as retail and hospitality, the tourism industry is prioritized by the Government of Vietnam as a key role in promoting economic growth and socio-economic development.

The global tourism industry, in general, and Vietnam in particular, sustained significant losses as a result of the Covid-19 outbreak. Many of the objectives for Vietnam's tourism industry that are outlined for 2020 are nearly difficult to carry out, and the goals are lowered drastically. The overall number of foreign travelers that entered Vietnam in 2021 was around 0.16 million. Before the COVID-19 epidemic, Vietnam attracted 18 million foreign visitors in 2019, with an average annual growth rate of 22.7% from 7.9 million visitors in 2015 to 18.1

million visitors in 2019 (Figure 2). The COVID-19 pandemic's effects and associated travel restrictions caused a significant drop in foreign visitor arrivals to Vietnam in 2020 and 2021. Only 3.8 million tourists visited Vietnam in 2020, a drop of 78.7% from the same period in 2019. Following the declining trend from 2020, it was predicted that just 0.16 foreign visitors arrived in Vietnam in 2021, a 95.83% decrease from the same period the previous year (Statista, 2022).

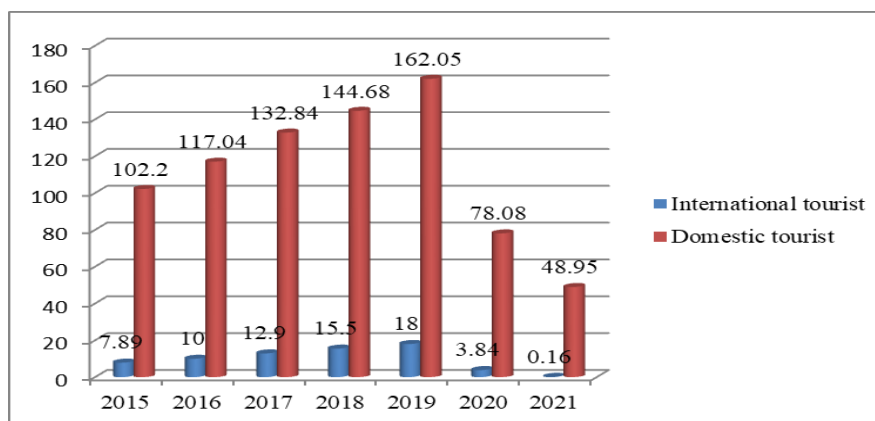


Figure 2: Number of tourist arrivals in Vietnam from 2015 to 2021 (in millions)
Source: Statista (2022a)

The tourism sector's attention has been forced to change to promoting and increasing domestic travel as a result of the mounting challenges. This has made it possible for travel companies to thrive during the epidemic time. The domestic tourism stimulus program was twice introduced by the tourism sector, once in May 2020 with the topic "Vietnamese travel to Vietnam" and once in September 2020 with the theme "Safe and appealing Vietnam tourism." (General Statistics Office, 2022). Prior to the COVID-19 pandemic, Vietnam had a 1.5-fold surge in domestic tourism, from 102.2 million arrivals in 2015 to 162.05 million arrivals in 2019, a growth rate of 10.5% annually. Vietnam's domestic tourism fell by 51.8% in 2020 compared to 2019 because of the pandemic, from 162.05 million (2019) to 78.08 million (2020) (see Figure 2). Around 49 million domestic tourists visited Vietnam in 2021, a huge drop of 37.3% from the year before (Statista, 2022a).

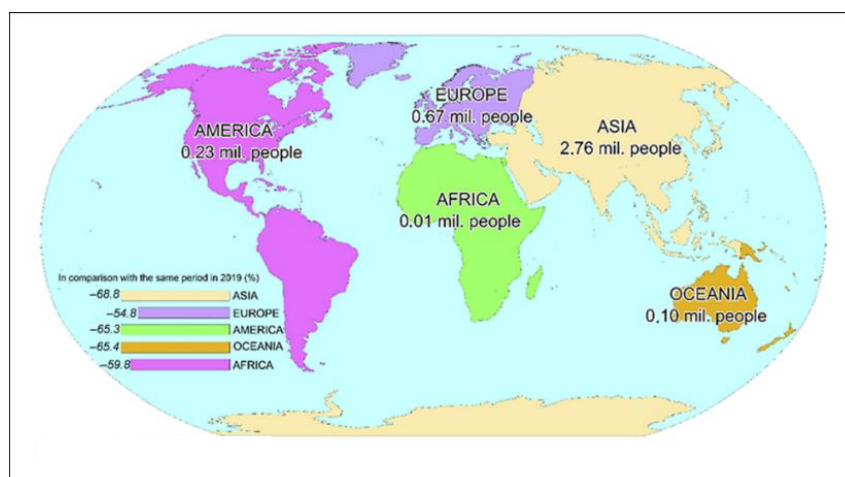


Figure 3. Number of international visitors to Vietnam in 2020 by continent
Source: Vu et al. (2022)

Asia accounted for 73.3% of all overseas arrivals to Vietnam in 2020, a decline of 68.8% from the previous year (see Figure 3). All major markets had a dramatic decline in visitors: China dropped by 83.5%, Korea by 80.4%, Japan by 78.4%, Taiwan by 78.8%, Cambodia by 46.6%, and Malaysia by 80.7%. In contrast, visitors from the Americas and Europe declined by 65.3% and 54.8%, respectively, in 2020 as compared to 2019 (Vu et al., 2022)

Before the COVID-19 epidemic, there were 14.3 million international arrivals by air, which was 79.83% of all arrivals and 15.2% more than in 2018. Visitors who came by road reached 3.7 million, which is 20.03 % and 31.08 % more than in 2018. And only 0.3 million people arrived by sea, which is 1.4% of all arrivals and is 22.6% more than in 2018 (see Figure 4).

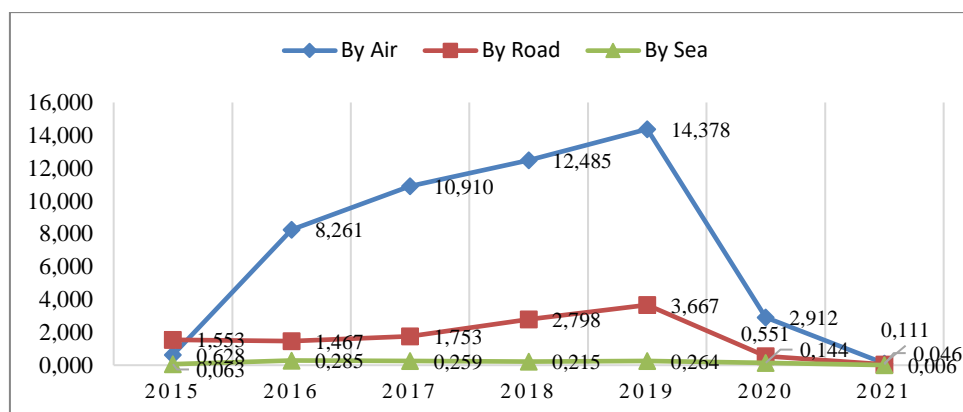


Figure 4: Number of international visitors to Vietnam, by means of transport
(in millions)

Source: VNAT (2022)

However, the number of international visitors to Vietnam in 2020 dropped dramatically compared to 2019. By air, the number of visitors fell by 79.7%, by road by 84.9%, and by sea by 45.4% (VNAT, 2022).

4.2.2. Impact on expenditures

Due to the fact that foreign visitors spend substantially more than Vietnamese visitors, the sudden decline in their numbers has had a huge impact on tourist spending as well as Vietnam's overall economy. International visitors made up only 17 percent of all tourists in Vietnam in 2019, but they were responsible for more than half of all tourism spending, spending an average of \$673 per traveler compared to \$61 spent by domestic visitors. Tourism expenditures made up 9.2 percent of the country's GDP in 2019 (see Figure 5). Between 2014 and 2019, the country's retail and food and beverage industries lost ground, while the tourist sector added 660,000 employees (Margaux et al., 2021).

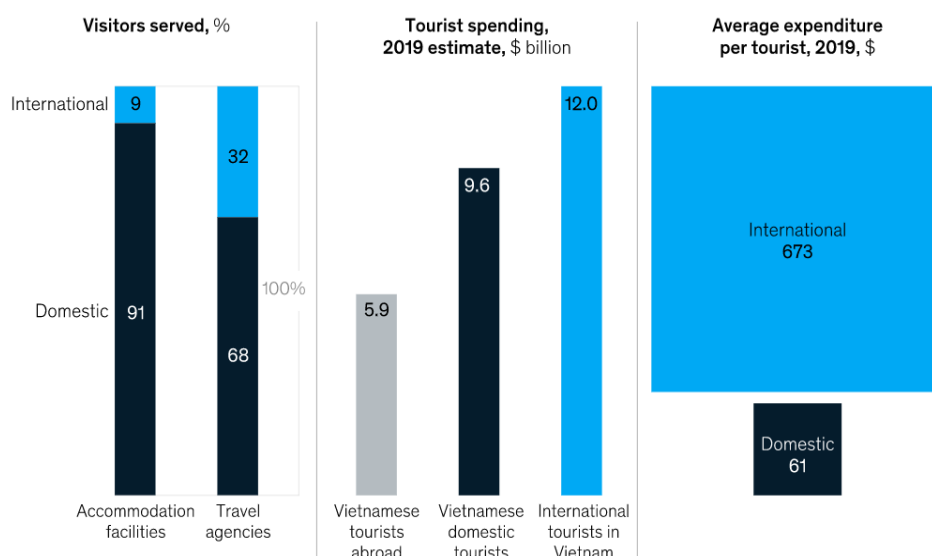


Figure 5: Comparison between expenditures of international and Vietnamese tourists

Source: Margaux et al. (2021)

4.2.3. Impact on revenue

3.5% of the nation's gross domestic product, or 1.40 billion USD, was generated by tourism in 2003. At the time, this amounted to approximately 2.43 million tourists and 576 USD per individual. The nation is now significantly more dependent on tourism than it was 17 years ago. Sales totaled \$11.83 billion, or 3.6 percent of the GDP, prior to the Covid-19 pandemic's onset. As a result, each traveler spent \$657 on their trip to Vietnam. Tourism revenue fell precipitously in 2020 as a result of the Covid-19 outbreak. Only \$3.23 billion of the \$11.83 billion (2019) was left (see Figure 6). Vietnam has experienced a 73% decline in this (Worlddata, 2022).

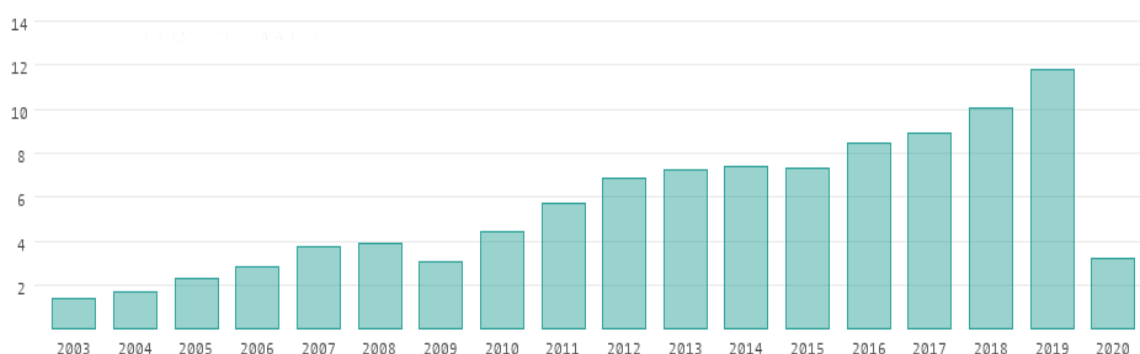


Figure 6: Tourism revenues in Vietnam (in billion U.S. dollars)

Source: Worlddata (2022)

4.2.4. Impact on GDP

Vietnam's tourist industry contributed little under two percent to the GDP in 2021, a significant decline from the previous years. The contribution of the tourist industry to GDP increased by an average of 6.3% from 2015 to 9.2% in 2019. However, the COVID-19 pandemic's effects in 2020 and 2021 had a significant negative influence on the tourism industry. Only 3.58% of the GDP was contributed by the tourist industry in 2020, a decrease of 1.97% from the same period in 2021 (see Figure 7).

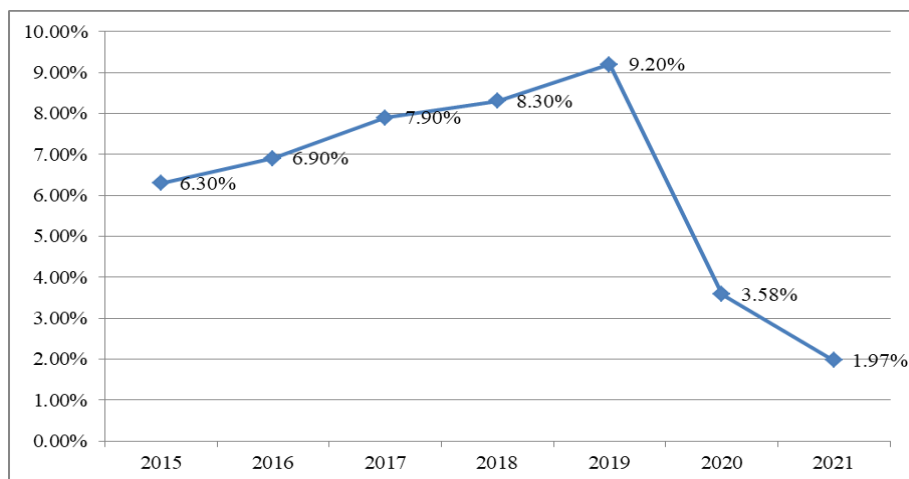


Figure 7: Share of direct GDP contribution from the tourism sector in Vietnam from 2015 to 2021

Source: Statista (2022b)

4.2.5. Impact on tourism employees

The COVID-19 epidemic has had the greatest impact on tourism industry workers, according to the GSO. In 2020, the COVID-19 outbreak-related border closures and restrictions on domestic travel resulted in the loss of employment for around 60% of the workforce in Vietnam's tourism sector. There are relatively small fluctuations in the sector's employment, between 30% and 40% (General Statistics Office, 2020). In 2021, the unemployment rate in the tourism sector grew further, reaching almost 90% of all employees in the travel industry and 70% to 80% of staff in the lodging sector (Vu et al., 2022).

4.3. Impact and strategic responses of Vietnam's tourism enterprises during the COVID-19 pandemic

The effects of the COVID-19 epidemic on various sectors of the tourism industry seem to vary, according to the available research. Additionally, the research reveals the tactical measures taken by companies during the outbreak.

4.3.1. Impact on Vietnam's tourism enterprises

About 90–95 percent of *tour operator enterprises* must shut down (except for very few businesses that organize intra-provincial tours). 90% of the 338/2,519 enterprises engaged in international travel that are asking to have their licenses revoked in 2020 will shut down. Over 35% of the total number of licensed rest stops will be operating in 2021, according to the number of tour operators requesting the cancellation of their travel business licenses. Due to the lack of customers, businesses that transport tourists also stopped operating (Nam, 2022).

In 2020, the nation's average occupancy rate will drop by 70-80% from 2019 in *accommodation, food, and beverage enterprises*. Hotels will have essentially no visitors in 2021, with the exception of a few isolation facilities. There are 38 thousand tourist lodging facilities around the country, with 780 thousand rooms, and an estimated 5% occupancy rate on an annual basis. The majority of the workforce in the tourism sector no longer works, and the remaining handful does so part-time. To make a living, workers must change their line of work. Businesses must reduce personnel by 70–80% starting in 2020. By 2021, there are only 25% fewer full-time workers than in 2020, with 30% of workers departing their jobs or ending their contracts, 35% of workers being temporary, and 35% of workers earning a moderate 10% wage (Nam, 2022).

Thousands of Vietnamese tourism enterprises have been severely impacted by the protracted COVID-19 outbreak. The resources required to maintain the bare minimum of operating conditions are no longer available to tourism businesses due to their exhaustion. When hospitality, food, and beverage businesses owe money to banks and are on the verge of being unable to pay them back now, problems mount (Vu et al., 2022) period 2016-2021, the numbers of accommodation, food, and beverage enterprises applying for new licenses tend to decrease in number to 3,892 enterprises in 2021, compared to 26.6% in 2016 compared to 2016 (see Figure 8).

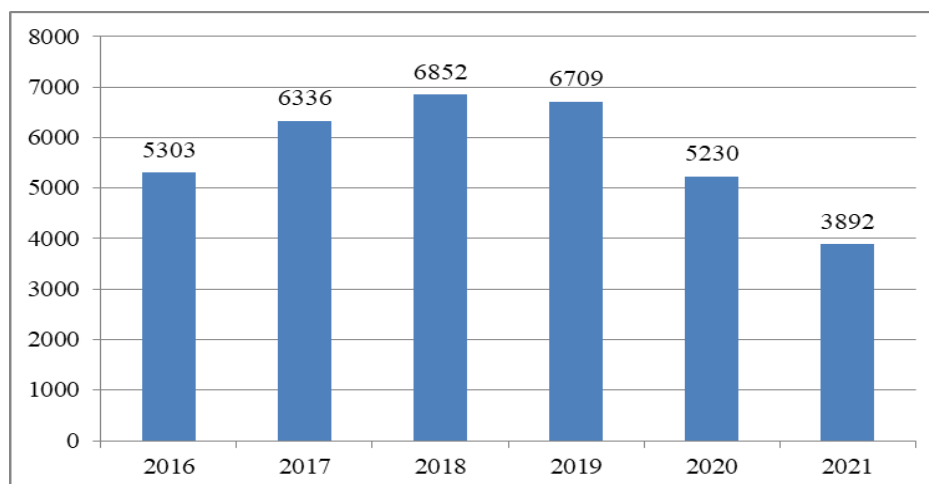


Figure 8: Accommodation, food and beverage enterprises apply for new licenses
(in enterprises)

Source: General Statistics Office (2022)

However, Vietnam's lodging, food, and beverage industries generated 11 billion US dollars in income in the first eight months of 2021 (see Figure 9). Prior to the COVID-19 pandemic, this industry experienced revenue growth year over year. Since 2020, the epidemic has stifled this expansion, in part as a result of restrictions on foreign travel to the nation and numerous lockdowns in various parts of Vietnam.

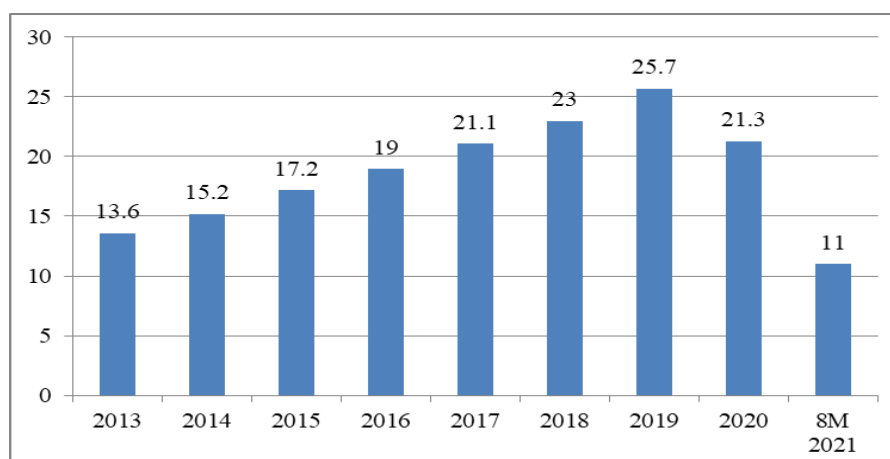


Figure 9: Revenue from accommodation, food and beverage services in Vietnam from 2013 to the first eight months of 2021 (in billion U.S. dollars)

Source: Statista (2021)

4.3.2. Strategic responses of Vietnam's tourism enterprises during the covid 19 pandemic

Most businesses have adopted one or more measures to minimize the negative impact of the Covid-19 epidemic. Many businesses are forced to change industries, change business models or cut most of their staff. When analyzing the strategic response of Vietnam's tour operators during the COVID-19 period, Do et al found that the retrenchment strategy was most adopted by tour operators (50%) in response to COVID-19, persevering (25%), exit (15.6%), and innovating (9.4%) (Do et al., 2022), respectively (see Figure 10).

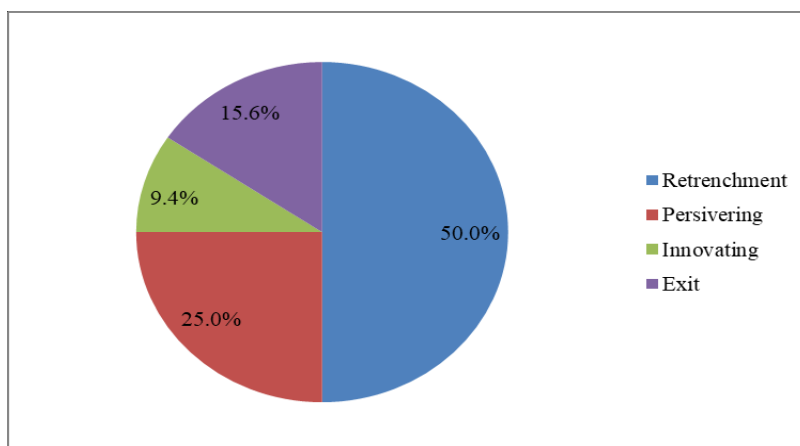


Figure 10: Strategic responses to COVID-19

Source: Do et al. (2022)

Retrenchment strategy is the most popular strategic response during the epidemic period (accounting for 50%). This strategy focuses on domestic tourism activities and postpones domestic and foreign tours. The main goal of this strategy is to help businesses reduce costs and/or product flow in the short term by narrowing their business (Do et al., 2022). According to ILO (2020) found that the majority of tourism firms (67.2%) affected by Covid-19 had implemented steps to cut labor expenses. This method is also widely used in many future types of research (ILO, 2020). A Survey of VCCI shows that 75% of enterprises have cut labor (Mai, 2022); According to a survey of the National Economics University, 35% of enterprises had to cut labor and 34% reduce wages (NEU-JICA, 2020).

All the solutions that have been applied can see that cost-cutting measures have a great impact on the lives of employees. According to the ILO assessment, workers most vulnerable to the economic impacts of the pandemic are older workers, women, young workers, informal workers, workers in unstable jobs, and migrant workers (ILO, 2020)

4.4. Recommendations to restore and develop sustainable Vietnam's tourism sector post-COVID pandemic

From the beginning of 2022 until now, the tourism industry has served nearly 72 million domestic tourists (the full-year plan is 60 million), and 733,000 international visitors. Total revenue reached 12.7 billion USD. The number of tour operators returning to operation and issuing new licenses has increased again, with 2,563 international travel businesses, and 1,060 domestic travel businesses. After the pandemic, 90% of accommodation establishments returned to operation, reaching over 55% of room capacity with weekdays and weekends reaching over 95%, especially destinations with great attraction (Government News, 2022). Transport and aviation activities meet the needs of foreign tourists quite well.

Therefore, the urgent goal of the tourism industry is to recover and develop tourism activities after the epidemic. The authors propose the following recommendations as references to the government, relevant agencies, and tourism businesses:

Firstly, for the Government and relevant authorities, under the negative impact of the Covid-19 pandemic, Vietnam's tourism industry needs the cooperation and contribution of the whole political system to remove difficulties, restore tourism, develop sustainably, and become an important economic sector. The government and relevant authorities should:

(1) Completing the system of legal documents to ensure uniformity and consistency. Reviewing and completing mechanisms and policies to encourage investment incentives, giving priority to strategic investors to implement key projects.

(2) Implement the policy of reducing VAT for tourism business activities; electricity price adjustment for tourist accommodation establishments; prolong the policy of reducing land rent; adjust the time of restructuring the repayment term; supplement a credit package for businesses and tourism business owners to borrow some loans with preferential interest rates to pay salaries and pay insurance for employees (to retain skilled workers); maintenance and repair of accommodation establishments, tourist attractions (degraded due to long closure).

Secondly, for tourism enterprises five fields have to be mentioned:

(1) *Focus on boosting demand-stimulating activities and recovering domestic tourism nationwide:* Enterprises need to have guidelines to welcome and serve tourists safely after the epidemic (tourism departments, tourism business units, and tourists) and organize communication, advertising, and promotion to reopen domestic tourism. At the same time, tourism activities must comply with epidemic prevention regulations under the guidance of the health sector and according to the issued set of criteria to gradually welcome international tourists to Vietnam.

(2) *Accelerating the digital transformation process in the tourism industry:* Formulate a digital tourism development plan for the period of 2021-2025. Apply information technology, digitize information and data to serve the management of accommodation establishments, travel agencies, tour guides, destinations, and tourist service establishments; database for market research, and tourism promotion. Strengthen close cooperation between the tourism industry and technology. Build a multi-utility integrated platform such as a secure tourist digital map to connect medical data and information about safe travel service facilities, discover destinations, manage tours, etc.

(3) *Diversify and improve the quality of tourism products:* Vietnam's tourism products after the pandemic should focus on developing nature tourism products such as sea tourism, unspoiled islands, ecotourism, and community tourism. In addition, businesses need to renew their existing tourism products in line with the changing needs due to the impact of the COVID-19 epidemic such as developing different types of night economic activities. Develop various types of tourism such as culinary tourism, shopping tourism, waterway tourism, eco-tourism, medical tourism, tourism around the city, excursion tourism associated with new agriculture and countryside...

(4) *Developing high-quality tourism human resources in the context of international integration:* After the pandemic, there is an urgent need for the development and repair of tourism human resources, particularly those of tourist lodging facilities. Therefore, to maintain and develop high-quality human resources, enterprises need to have good remuneration policies; training skills, and knowledge about digital transformation; actively connect with tourism human resource training institutions; improve management capacity; actively connect to participate in high-quality human resource training with international training systems. In addition, the training institution must attract investment in the training system, and physical facilities of the teaching staff; put into the training program new knowledge about new types of tourism, etc.

(5) *Developing tourism toward green growth*: Vietnam can pilot the model of energy efficient and economical destination at the destination scale of islands. Prioritize the development of tourism types that promote green growth (ecotourism, community tourism, agricultural and rural tourism, sea and island resort tourism associated with blue sea economic development, tourism extreme sports ensure standards, green criteria...).

5. Conclusion

In this research, the authors analyze and evaluate the tourism business in Vietnam during the covid 19 pandemic. Simultaneously, the article also focuses on analyzing the impacts and responses of businesses operating in the field of tourism to propose appropriate recovery strategies.

The study has generalized Vietnam's great potential for tourism development due to its favorable location in terms of geography, climate, and natural conditions, including heritage sites, tourist attractions, and UNESCO awards. At the same time, the study uses secondary data sources from previous studies and General Statistics Office to analyze the impact of the COVID-19 pandemic on Vietnam's tourism industry. The authors also pointed out the significant impact of the COVID-19 pandemic on Vietnam's tourism business before and during the pandemic. Indicators in the tourism business (number of arrivals, expenditures, GDP growth, revenue, and employment rate) tend to decline compared to before the pandemic. As a result, the overall economic efficiency and the contribution of the tourism industry to economic growth are reduced. The analysis results also show that the contribution of the tourism industry to GDP growth is significantly reduced compared to before the pandemic.

Research has also shown the impact of the COVID-19 pandemic on accommodation, tour operators, and food and beverage services enterprises lead to an increase in the number of tour operator enterprises revoking licenses and closing down. At the same time, the numbers of accommodation, food, and beverage enterprises applying for new licenses tend to decrease significantly. The study summarizes four strategies chosen by Vietnam's tour operators to respond to the pandemic, including retrenchment, persevering, innovating, and exiting. Among them, the strategy most applied by these travel companies is retrenchment. This shows that the majority of tour operators in Vietnam focus on developing short- and medium-term crisis response strategies rather than the long-term. Therefore, This causes the greatest economic impact of the pandemic on older workers, women, and young workers.

At the same time, the study has shown recommendations for the government and relevant authorities, and tourism enterprises to recover the tourism business after the pandemic. The authors emphasized that to promote tourism to restart, it is necessary to quickly innovate, adapt and increase the use of information technology applications to understand the needs of visitors and understand new products and tourism markets via the internet to gradually restore the tourism industry in an efficient and safe direction. The introduction of information technology applications into tourism activities contributes to the introduction and widespread promotion of safe destinations. These are the solutions to recover soon and become the driving force for the tourism industry to develop after the covid epidemic period.

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