



Vietnam Tourism Industry During Covid-19 Pandemic: Issues and Solutions

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Abstract. Tourism, a key initiator of foreign exchange of almost economies, is the industry hardest hit by the COVID-19 pandemic. Through surveying literature, industrial reports, and statistical figures, this paper analyzes the multidimensional impact of the pandemic on the tourism industry, forecasts, and proposes solutions to recover for the industry.

Keywords: Covid-19 · Tourism · Challenges · Solutions · Vietnam

1 Research Background

In recent decades, before the Covid-19 pandemic, tourism has been one of the major sectors within the economy of Vietnam. This sector contributed to a GDP of over nine percent in 2019 [1]. However, the Covid-19 pandemic has definitely changed the way people work, live, and travel. As a result, the development of the tourism industry worldwide and in Vietnam has been severely destroyed. In 2020, Vietnam stopped receiving international visitors, so the number of tourists decreased by 80% compared to 2019, reaching only 3.7 million; domestic tourists decreased by 34% over the same period; total revenue from tourists decreased by up to 59% [2]. The year 2021 is the second year in a row that the pandemic has severely damaged the tourism industry. The past two years have been challenging times for the hospitality and tourism industry. Ninety to ninety-five percent of businesses have to stop operating or change business models. In 2021, the number of employees still working full-time will account for only 25% of the previous year, unemployment increased, income decreased, and staff's lives are significantly affected [2].

Currently, there are many studies conducted on measurements of the general impacts of COVID-19. However, there is a lack of research giving a comprehensive synthesis of multi-dimensional impacts of Covid-19 on the tourism industry (most papers focused on a single dimension) and how researchers and practitioners forecast the future and recovery possibility of this industry, as well as solutions to adapt to the new normal condition flexibly. In addition, the situation of Covid-19 is constantly fluctuating, leading to the need for up-to-date research on forecasting the future of the tourism industry during and after the pandemic and solutions to adapt to the “new normal”.

This paper explores answers to the following research questions: (i) What are issues raised by the Covid-19 pandemic to the tourism industry in Vietnam?; (ii) What is the outlook for development in the future of the tourism industry?; and (iii) What are solutions for the tourism industry to recover and develop in new normal condition?

2 Literature Review

As stated by the research of [3], tourism is one of the greatest patients of Covid-19. To assess the impact of COVID-19 on tourism, researchers in literature used essential criteria such as revenue, number of arrivals, expenditure, and stand from various points of view such as government, enterprise, employee, and society. Yang Yang et al. [4] developed a special COVID19tourism index, an analytical tool to monitor the pandemic's tourism effects. Impacts of covid-19 were analyzed on the global, cross-regional scale [4–7] and continent, country/county scale such as China, Malaysia, ... [8–11].

To address the issues raised by the Covid-19 pandemic to the tourism industry in Vietnam, this research will use the balanced scorecard approach. The multidimensional impact of the pandemic will be depicted through four perspectives (i) financial impact (expenditure of customers on this sector), (ii) customer perspective (the variation of number of customer/ trips/ visitors and impact of covid-19 on consumers' purchasing behavior in term of tourism related products), (iii) internal process (changes in doing business procedures of units in tourism sectors), and (iv) learning and growth (impact on quantity, quality, and psychology of labor force in tourism sectors). After that, this paper collects and synthesizes forecasts on the future of the tourism industry and then proposes appropriate solutions to governments and enterprises.

3 Research Methods

This research collected numeric data from reputed databases as Euromonitor, General Statistics Office of Vietnam, Statista, and Data World Bank. Besides that, the author also gathered qualitative data from industrial reports and secondary interview scripts of practitioners and researchers. After that, collected quantitative and qualitative data are compared, combined, and synthesized to gain insights into the research problem.

4 Research Findings

4.1 Impact of the Pandemic on Vietnam Tourism Industry

Since WHO declared Covid-19 as a global pandemic, travel worldwide has significantly declined due to the anxiety of tourists and potential tourists [3].

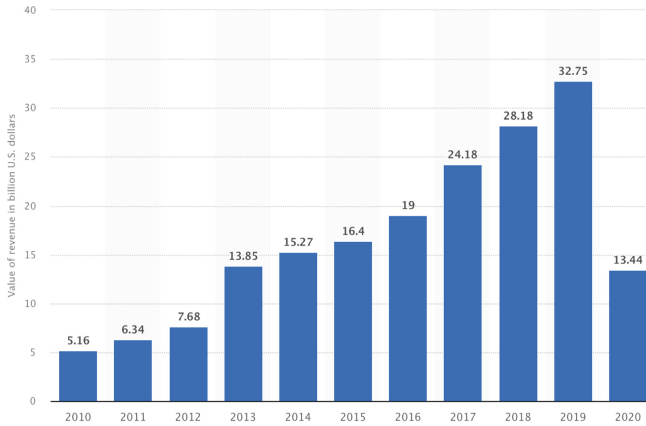


Fig. 1. Annual revenue from the tourism sector in Vietnam from 2010 to 2020 (in billion U.S. dollars). Source: Statista (2022)

4.1.1 Impact from Financial Perspective

According to Statista, in 2020, Vietnam's tourism revenue was approximately 13.4 billion U.S. dollars, which significantly declined compared to the period 2010 to 2019 [12] (Fig. 1). For more details, Table 1 shows that domestic expenditure in value has witnessed a significant decrease since 2020, especially expenditure on Food, Shopping, and Travel modes. The World Tourism Organization (UNWTO) estimates that the Covid-19 pandemic will cost the global economy around \$2.4 trillion in 2021 due to the collapse of the international tourism industry. Vietnam is no exception to this influence.

In the whole year of 2020 and the first 11 months of 2021, Vietnam only received 7.6 million international visitors, very low compared to the 18 million arrivals in 2019, of which mainly experts and technical workers, foreigners working on projects in Vietnam, international students and drivers transporting goods at border gates [13].

4.1.2 Impact from Customer Perspective

According to the General Statistics Office of Vietnam, for the entire year 2021, tourist arrivals plunged 95.9% compared to the same period of 2020. Table 2 shows that the number of visitors and revenue of the tourism industry in Vietnam fluctuates unpredictably and significantly decreased in two recent years. Vietnam's tourism industry had a strong growth rate from 2017 to 2019. However, the number of inbound arrival trips plummeted in 2020 and 2021 in the transportation modal (air and water) and type of arrival (business or leisure).

4.1.3 Impact from Internal Process Perspective

During the covid epidemic, tourism activities were closed many times. During the periods of reactivation, business processes are subject to a great deal of change and subject to much control. Therefore, businesses and tourists must regularly update the situation and strictly follow the direction of the Government, the National Steering Committee

Table 1. Domestic Expenditure From 2016–2021.

Type of Expenditure	2016	2017	2018	2019	2020	2021
– Domestic Business Expenditure	27,872.1	34,310.6	41,170.1	47,105.6	28,015.7	30,833.3
– Domestic Leisure Expenditure	94,660.2	113,273.3	132,521.6	149,057.3	99,328.5	115,992.0
– Domestic Expenditure on Activities	13,559.4	16,055.8	18,448.2	21,047.9	15,124.2	21,889.4
– Domestic Expenditure on Food	29,686.3	35,648.0	41,745.4	48,467.2	24,233.6	27,868.6
– Domestic Expenditure on Lodging	37,734.4	47,632.6	58,552.8	63,829.9	50,366.6	55,703.7
– Domestic Expenditure on Shopping	13,238.5	15,590.1	17,577.0	20,300.4	9,135.2	10,231.4
– Domestic Expenditure on Travel Modes	23,749.0	27,853.0	32,187.9	37,175.1	25,279.1	27,301.4
– Other Domestic Expenditure	4,564.7	4,804.3	5,180.5	5,342.4	3,205.4	3,830.8
Total Domestic Expenditure	122,532.3	147,583.9	173,691.8	196,162.9	127,344.2	146,825.3

Source: UNWTO, Euromonitor

Unit: VND billion

Table 2. Number of Inbound Arrivals Trips 2017–2021

Number of trips	2017	2018	2019	2020	2021
Air Arrivals	9,722	11,651	13,547	514	502
Land Arrivals	1,764	2,124	2,472	2,903	2,731
Water Arrivals	143	171	187	34	7
Business Arrivals	1,953	2,342	2,722	621	615
Leisure Arrivals	9,676	11,604	13,484	2,830	2,625

Source: UNWTO, Euromonitor

on COVID-19 prevention and control, the Ministry of Health, and the local People's Committees on epidemic prevention. At the same time, maintain the regular operation of hotlines to connect with businesses and tourists, promptly grasp the situation, receive information, and have solutions to solve difficulties for businesses and tourists.

According to Dr. Ha Van Sieu, Vice Chairman of Vietnam National Administration of Tourism, accommodation services, tour operators, and travel services have been shut down or temporarily closed as most international and domestic flights have been canceled or significantly disrupted due to travel restrictions. The occupancy rate of accommodation services will be around 20% in 2020 and less than 10% in 2021 [14]. As sharing by Tien Giang People Committee, “The province’s tourism activities have spent nearly two years under the direct impact of the Covid-19 pandemic, so organizations and individuals doing tourism business in the province face many difficulties; Tourism business has almost completely halted, leading to exhausted financial resources of businesses and difficulties in covering expenses” [15]. After each pandemic outbreak, the tourism industry had a glimpse of hope to recover, but the door slammed shut again as the fourth wave of Covid-19 (in the year 2021) caused the summer tourist season to freeze. There are tourism businesses that want to maintain their business and even regret it because if they change direction early, the loss may be less heavy.

4.1.4 Impact on Tourism Workers and Potential Learning and Growth Capability of Tourism Companies

The World Tourism Council stated that above 100 million jobs in the tourism sector were at risk in 2020 [16]. According to ILO, in South East Asia, in 2020, the rate of job losses in tourism-related sectors were four times greater than in non-tourism sectors [17]. Due to financial and operational difficulties, Vietnamese tourism businesses had to cut off the labor force or reduce the salary of their employees and increased informality. The average wages in the tourism sector in Vietnam fell by nearly 18% (almost 23%, if counted only for women), and the number of formal employees decreased by 11% [17]. As a result, the unemployment rate in this industry was getting higher and higher. Tourism workers changed their job to sustain their life and their family. For example, these are responses from service sector workers: (1) “About 70% of our income has decreased since the outbreak of COVID-19; therefore, to maintain life in the current context, we need to redistribute our lives” (2) “After COVID-19 broke out in Vietnam, I lost my job and found it very difficult to find a new job.” [18]. According to a survey conducted by JobsGO and Mytour with employees in the tourism and hotel industry: (i) There are times when the tourism - restaurant - hotel industry almost freezes all activities, only about 21.4% of people continue to work; (ii) At the same time, their income level has also been affected quite a lot; (iii) Up to 35.5% of people fell into unemployment, and only 2.8% of people were not affected by the Covid-19 situation; (iv) A large number of workers in this industry have chosen to switch to other occupations that are not in the industry or to work temporarily to ensure income (respectively 18.4% and 19.5%) [19]. That fact will lead to the scarcity of human resources for the post-covid recovery period.

4.2 Forecasting Future of the Tourism Industry

As of March 11th, 2022, Vietnam recorded 5.26 million infections, ranked 20th out of 225 countries and territories in terms of total cases. However, the impact on the public health of Covid-19 has already been reduced significantly. To recover the economy, Vietnam and other countries worldwide have decided to open for tourism. In 2021, The Vietnamese

Ministry of Culture, Sports and Tourism launched a new campaign named “Vietnam: Go to Love!” following the 2020 launch of an app and campaign called “Vietnam tourism – a safe and attractive destination” in both Vietnamese and English, which was created to keep tourists updated on the safety status of various lodging venues, entertainment and other related information as submitted to authorized agencies. Vietnamese government allows welcome international tourists from March 15th, 2022. As a result, in the first two months of 2022, international visitors to Vietnam were estimated at 49,200 arrivals, up 71.7% over the same period in 2021 [20, p. 2]. Below are a number of tables showing the promising forecast of Euromonitor International on the tourism industry of Vietnam from 2022 to 2026 (Tables 3, 4 and 5).

Table 3. Forecast Inbound Arrivals: Number of Trip 2022–2026

Inbound Arrivals	2022	2023	2024	2025	2026
– By Air	2,456	7,264	14,625	18,320	21,091
– By Land	2,387	1,439	2,739	3,372	3,832
– By Water	18.1	47.8	138.0	187.1	238.0

Source: Euromonitor

Table 4. Forecast Domestic Business Trip by Travel Mode 2022–2026

Domestic Business Trips	2022	2023	2024	2025	2026
– By Air	5,657	6,847	8,057	8,810	9,585
– By Land	5,474	6,745	7,696	8,533	9,289
– By Rail	200	242	265	280	291
– By Water	4.7	5.8	6.6	6.6	7.3

Source: Euromonitor

Table 5. Forecast Outbound Expenditure 2022–2026

Outbound Leisure Expenditure	2022	2023	2024	2025	2026
on Lodging	79,765	157,690	176,467	190,627	204,882
on Activities	38,131	77,680	90,907	100,635	109,758
on Food	54,474	110,305	128,339	140,309	152,616
on Shopping	98,442	200,414	231,724	280,619	305,233
on Travel Modes	83,267	162,351	192,509	189,660	202,791

Unit: VND billion

Source: UNWTO, Euromonitor

4.2.1 Gradually Recovery in International Tourism

It is believed that after April 2022, the pandemic will be temporarily under control, the vaccine will be given on a large scale, and countries will open to tourism. However, tourism will recover gradually, not in a short period of time by leaps and bounds. According to calculations by the Economist Intelligence Unit (EIU) (2021), in 2022, international tourism is still unlikely to return to pre-pandemic growth. Even though many countries, especially the group of developed countries, have achieved a high level of vaccine coverage, the opening of borders and international tourists will still be somewhat limited. “It is expected that the number of international tourist arrivals in Vietnam will increase again and reach the pre-pandemic level in the next few years” [21].

4.2.2 Domestic and Wellness Tourism Flourish

According to EIU, in 2022, domestic tourism is likely to continue to prosper, becoming the lifeline for the entire industry. Based on the EIU’s growth scenario, the world’s total domestic tourism revenue in 2022 will grow by 5.3%, enough to bring this segment back to pre-pandemic development. Domestic travel and close-to-home tourism (staycation) are preferences of Vietnamese tourists in 2022 [22]. According to the forecast of the World Tourism Organization (UNWTO), wellness tourism will grow strongly in the post-Covid-19 era. Global Wellness Institute (GWI) predicted this type of tourism could reach \$919 billion in revenue by 2022.

4.3 Solutions for Practitioners

Experts believe in the promising future of the industry, and March 15th, 2022, is the time when the Vietnamese government allows the reopening of all tourism activities after two years of “freezing”. However, the road to tourism recovery, flexible and safe adaptation to the pandemic is still fraught with difficulties and challenges. The author proposes several following suggestions to practitioners for the recovery and development of the tourism industry.

4.3.1 Ensuring the Safety in the Prevention of Covid-19

The prerequisite for tourism activities in this “new normal” period is that tourism business units must strictly control the epidemic prevention and control process, ensure the safety of tourism activities, and at the same time take appropriate preparation in the handling of medical incidents that arise. Vaccinated human resources, connection with testing labs and the medical units, extensive propaganda with visual means, compliance, and review of compliance with epidemic prevention and control instructions of the Ministry of Health are mandatory conditions for operations.

4.3.2 Focusing More on Domestic Tourists with New Products

As the forecast of almost experts, domestic tourism flourishes on the global scale as well as in Vietnam. Tourism businesses should attract and deploy potential via safe and

interesting services and products such as staycation, travel services in favor of convalescence, relaxation, beauty, and health care. The greener trend products such as cultural tourism, community tourism, rural tourism, and adventure tourism are suggestions for tour operators. Cultural tourism products are products that do not cost much money to invest in but bring authentic experiences to tourists in a locality in terms of lifestyle, tradition, history, cultural activities, art, architecture, cuisine, and handicraft. There will be several recommended services during this time, such as room service, self-catering, and COVID test kits delivered directly to the customer's accommodation.

4.3.3 Boosting Digital Transformation and No-Touch Travel

The digital transformation in the tourism industry is “an indispensable requirement in the process of integration and development, not only increasing utilities for tourists and managers but also improving competitiveness with other countries” [23]. Automation, electronic check-in, electronic payment, electronic customs declaration, facial recognition, induction faucet, automatic opening/closing doors... Are digital, high tech, and no-touch technologies to ensure the contactless service [24] and eliminate risks of spreading out Covid-19. Dr. Ha Van Sieu, Vice Chairman for Vietnam National Administration of Tourism (VNAT) shares that “leveraging technology to not only ensure a safe seamless travel for tourists, but to also personalize the traveler's experience” [25]. “We have prioritized safety for both guests and staff by adopting touchless services such as contactless check-in and check-out, in-room tablets, mobile key and press reader, among others,” Mr. Strahm, InterContinental Hanoi Landmark72 General Manager, shared [14].

4.3.4 Tourism Destinations' Digital Marketing Strategies

Using Digital Marketing is one of the most successful market approaches with the form of digital technology application in promoting and introducing domestic tourism destinations. Besides that, practitioners can promote tourism on communication channels and social networks, communicate about the safe welcome process (by video), and build an “online travel” program for domestic tourists. The broader use of digital marketing instruments is demonstrated that helps tourism businesses to propose a new value for their customers, catch the new requirements and trends in tourism, and then significantly increase demand for domestic tourism destinations [26]. Research paper [27] also proves that digital marketing has a significant relationship with intentions for domestic tourism and fosters the effectiveness of tourism businesses.

4.3.5 Flexible Business Plan

According to WHO, the Covid-19 pandemic is still unpredictable, tourism businesses have to prepare flexible/agile business plans to adapt to the evolution of the epidemic quickly. As Mr. Patrick Verove, General Manager of InterContinental Hanoi Landmark72, shared proactive action plans to overcome the difficulties: (i) “At a time of great uncertainty, we have ensured guests can trust us for flexibility, cleanliness, safety and wellbeing priority,” (ii) “Faced with temporary closures and low demand, we have identified ways for operational changes to improve profitability, protect cash flow, apply sophisticated digital solutions and train our staff with a growth mindset.” [14].

4.3.6 Ensuring Quantity and Quality of Labor Force

Due to the impact of Covid-19, many labor in the tourism sector have changed their job. According to a survey conducted by JobsGO and Mytour, up to 36.9% of employees feel concerned about the epidemic's effects in the near future, 24.5% of people hesitate because of low remuneration. Consequently, there is a lack of skilled human resources during the recovery period when people are partly worried about the instability of work and the epidemic that could break out again at any time. In order for tourism activities to be "revived" soon, on the one hand, businesses must find ways to retain workers. On the other hand, it is essential to petition the government for financial support and policies to support unemployed workers so that they do not leave the tourism industry. Short-term, on-the-job training plan, standardized working process, blended training, and automation (to reduce labor intensity) are suggested to practitioners.

4.4 Recommendation to Tourism Policy

This research suggests the following solutions for the Vietnamese government to foster the recovery progress of the tourism industry: Firstly, opening the economy is associated with an investment in improving healthcare capacity, safe disease prevention and control, and effective and timely implementation of the Covid-19 epidemic prevention and control program.

Secondly, to ensure social security and support employment, helping employees in the tourism industry to stabilize their lives and improve their qualifications. Thirdly, to support the recovery of enterprises, cooperatives, and business households in implementing policies on tax, fee, and tax exemption and reduction to help enterprises restructure debt repayment terms. Thereby contributing to removing difficulties in cash flow for tourism businesses to restore and expand production and business activities, invest in infrastructure, improve tourism quality, and meet the needs of tourists.

Fourthly, invest in infrastructure development and digital transformation. Concentrating capital on important and urgent projects with significant spillover effects; Transport infrastructure connects regions and seaports to help strengthen connections to key tourist areas and destinations, promote inter-provincial and inter-regional tours, and maximize potential advantages of natural resources, culture, and heritage of localities in tourism development. Implementing a digital transformation program to support businesses can promote and attract world tourists through digital tools and channels.

Fifthly, institutional reform, administrative reform, improvement of business investment environment, ensuring the stability of macro balances, thereby facilitating the attraction of investment in tourism, helping businesses tourism industry is assured to expand production and business.

5 Conclusion

This research analyses impact of the covid-19 pandemic on the Vietnam tourism industry and synthesizes different forecasts for the future of this industry. The impact of covid-19 has been presented in four main aspects (financial, customer, operations, and labor (learning and growth)). Furthermore, trends, solutions, and success factors in recovering

during and after the pandemic are discussed to give suggestions to practitioners in this industry. Firstly, the paper collected and analyzed statistical numbers on international and domestic visitors, total revenue from tourists, and current issues in conducting business to depict the enormous impact and challenges for the hospitality and tourism industry. Secondly, the author synthesized experts' forecasts about the possibility of recovering during and after the pandemic. It is believed that after April 2022, the pandemic will be temporarily under control, and countries will open to tourism. Tourism will recover gradually, not in a short period of time, by leaps and bounds. "It is expected that the number of international tourist arrivals in Vietnam will increase again and reach the pre-pandemic level in the next few years" [21]. Finally, research suggests practitioners should focus more on domestic tourists, boosting digital transformation, no-touch travel, digital marketing, green tourism, flexible business models, and ensuring safe and healthy for their customers through investing in anti-covid technologies.

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