MINISTRY OF CULTURE, SPORTS AND TOURISM

VIETNAM NATIONAL ADMINISTRATION OF TOURISM

VIETNAM TOURISM
ANNUAL REPORT
2019

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VIETNAM TOURISM ANNUAL REPORT 2019

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ABBREVIATIONS

ASEAN: Association of Southeast Asian Nations

GDP: Gross Domestic Product

GSO: Viet Nam's General Statistics Office

UNWTO: World Tourism Organization

VNAT: Vietnam National Administration of Tourism

Mr. Nguyen Trung Khanh
Chairman,
Vietnam National Administration of Tourism

MESSAGE OF VNAT'S CHAIRMAN NGUYEN TRUNG KHANH

2019 was another successful year of Vietnam tourism. The sector recorded significant annual increase of over 18 million visitor arrivals (+16.2%); 85 million domestic trippers (+6%); and VND 755,000 billion of tourism receipts (+18.5%).

These outcomes were impressive if compared to the average growth of the world (+3.8%) and Asia and the Pacific (+4.6%) in 2019 as reported by the World Tourism Organization (UNWTO). Viet Nam overtook Indonesia to stand 4th in the region in terms of international arrivals.

According to the World Economic Forum (WEF)'s 2019 report, the competitiveness of Vietnam tourism advanced to the 63rd/140 economies from the rank of 67th/136 in the 2017 WEF's ranking table. In 2019, Vietnam tourism was named in 5 global and regional categories of the prestigious World Travel Awards: World's Leading Heritage Destination (1st time); World's Best Golf Destination (1st time); Asia's Leading Destination (2nd time); Asia's Leading Cultural Destination (2nd time); Asia's Leading Culinary Destination (1st time).

Those outstanding achievements were resulted from the great effort of all stakeholders in the tourism sector under the leadership of the Party, the Government and the Ministry of Culture, Sports and Tourism releasing timely and effective directions, policies and taking immediate actions to facilitate the development of the tourism sector. The close coordination of the relevant ministries, sectors, localities and enterprises also significantly contributed to the impressive development of the tourism sector.

In 2020, the 60th year anniversary of Vietnam tourism (9 July 1960 - 9 July 2020) is celebrated in the context that Viet Nam also has many significant events in 2020. In the hard time caused by the unprecedented Covid-19 pandemic, Vietnam tourism will make all the effort to continue the implementation of the action plan to realize the Political Bureau's resolution No. 08-NQ/TW on developing tourism into a key economic sector and bring the Vietnam Tourism Development Strategy 2030 into reality, contributing to the success of the 13th Congress of the Party.

In the above context, Vietnam National Administration of Tourism would like to introduce to you the Vietnam Tourism Annual Report 2019./.

Scenery of Trang An Tourist Site (Ninh Binh)

1

VIETNAM TOURISM IN NUMBERS

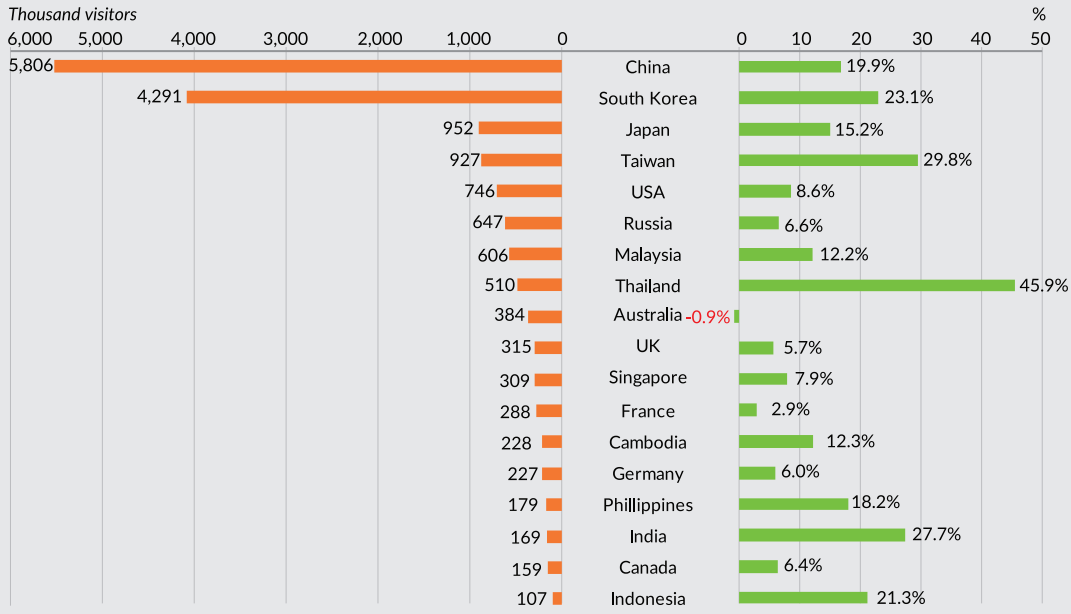
In the context of global tourism's slower growth of in 2019, Vietnam tourism overcame challenges and difficulties to receive 18 million international visitors, fulfilling the target set by the Government. The number of domestic visitors and tourism receipts also saw significant growth.

18 million	85 million	755 thousand billion	9.2% GDP
International visitors	Domestic visitors	Total tourism receipts	Direct contribution of tourism

VIETNAM TOURISM SET NEW RECORD OF 18 MILLION INTERNATIONAL VISITORS

In 2019, Viet Nam, for the first time, welcomed 18 million international visitors, a year-on-year increase of 16.2%. The top 10 source markets contributed 15,2 million visitors, occupying 84.3% of the total.

Figure 1.1. **Number and growth of international visitors from leading source markets, 2019**

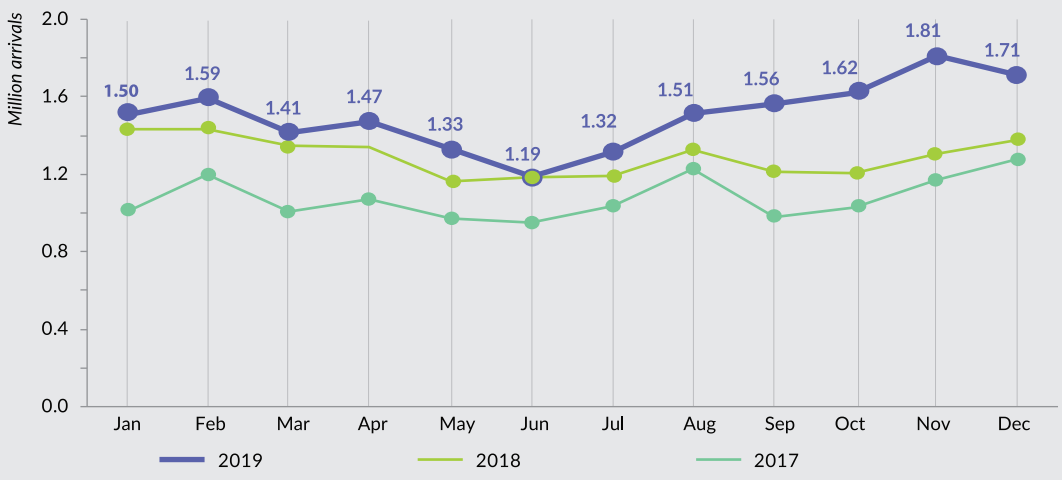


Source: Compiled from the data of GSO

The 4 largest markets were all from Northeast Asia. China took the first place with 5.8 million (+16.9%), followed by South Korea (4.3 million; +23.1%), Japan (952 thousand; +15.2%) and Taiwan (927 thousand; +29.8%).

USA and Russia maintained the 5th and 6th positions with moderate growth. Malaysia took the 7th position with 2-digit growth (+12.2%). Notably, the number of Thailand visitors rocketed by 45.9%, surpassing Australia to stand at the 8th position. The UK was still at the 10th position with its rather stable growth of 5.7%.

Figure 1.2. **International visitors to Viet Nam by month, 2017-2019**

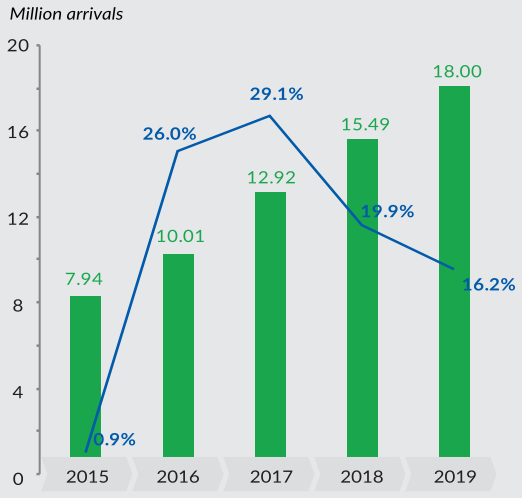


Source: Compiled from the data of GSO

In 2019, the number of international visitors saw slow growth in the first 8 months (+8.7%). Nonetheless, Vietnam tourism made an impressing bounceback in the last 4 months with the 31.5% increase. November recorded the highest number of visitors (1.81 million) while June saw the lowest with 1.19 million.

From 2015 to 2019, the number of international visitors increased by 2.3 times, from 7.9 million to 18 million, recording average annual growth of 22.7%. This was listed among the world's fastest growth if compared to that of other countries, and far higher than average annual growth rate of Vietnam tourism during the 2011-2015 period (+7.6%).

Figure 1.3. International visitor arrivals to Viet Nam, 2015-2019



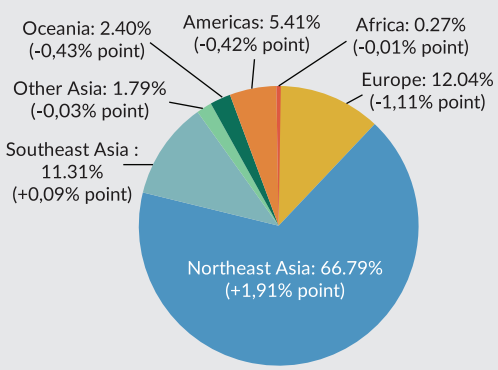
Source: Compiled from the data of GSO

Regarding the proportion by region, short-haul markets from Asia took up the major part (79.9%), of which Northeast Asia occupied 66.8% and Southeast Asia had a share of 11.3%; the remaining Asian markets accounted for 1.8%. Europe occupied 12%, while the Americas and Australia followed with 5.4% and 2.4% respectively.

The big proportion of the Asian source markets was commonly seen in regional destinations. Asian visitors to Malaysia occupied 90%, of which the share of Singaporean visitors was 39%. Asians to Thailand took up 75%, of which the share of Chinese visitors was 28%.

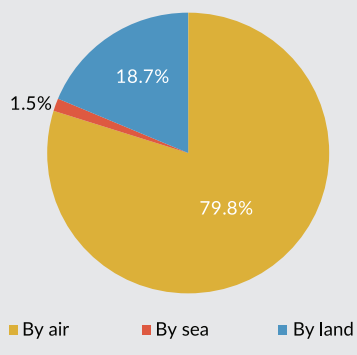
International visitors by air occupied 79.8%, by land 18.7% and by sea 1.5%. Particularly, those travelling to Viet Nam by air took up a considerably higher proportion in comparison to the average rate of global tourism. According to UNWTO, in 2019, international visitors globally travelling by air occupied 58%, by land 38% and by sea 4%.

Figure 1.4. Proportion of international visitors in 2019 by regions, compared to 2018



Source: Compiled from the data of GSO

Figure 1.5. Proportion of international visitors in 2019, by mode of transport

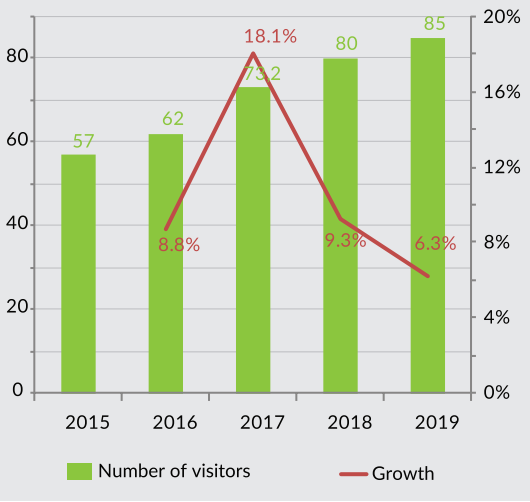


Source: Compiled from the data of GSO

DOMESTIC VISITORS REACHED 85 MILLION

The number of domestic visitors in 2019 was 85 million, increasing by 6.3% over 2018. During the period 2015-2019, the number increased by 1.5 times from 57 million in 2015, recording an average annual growth of 10.5%.

Figure 1.6. **Number and growth of domestic visitors, 2015 - 2019**



Source: VNAT

DIRECT CONTRIBUTION OF TOURISM REACHED 9.2% GDP

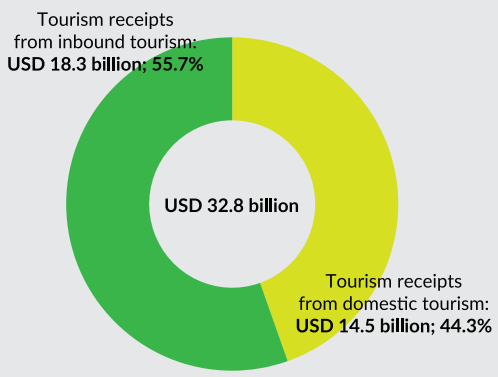
- Total tourism receipts: VND 755 thousand billion (approx. USD 32.8 billion), of which:

- Tourism receipts from inbound tourism (tourism exports): VND 421 thousand billion (approx. USD 18.3 billion), occupying 55.7%.

- Tourism receipts from domestic tourism: VND 334 thousand billion (approx. USD 14.5 billion), occupying 44.3%.

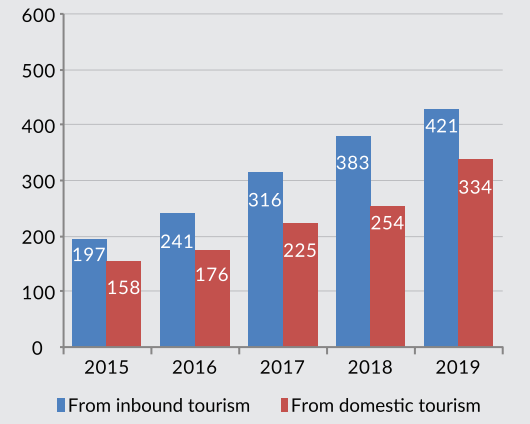
- Direct contribution of tourism to the GDP: **9.2%**.

Figure 1.7. **Proportion of total tourism receipts, 2019**



Source: Calculated according to Tourism Satellite Accounts (TSA) recommended by UNWTO

Figure 1.8. **Tourism receipts from inbound and domestic tourism, 2015 - 2019** *(VND thousand billion)*

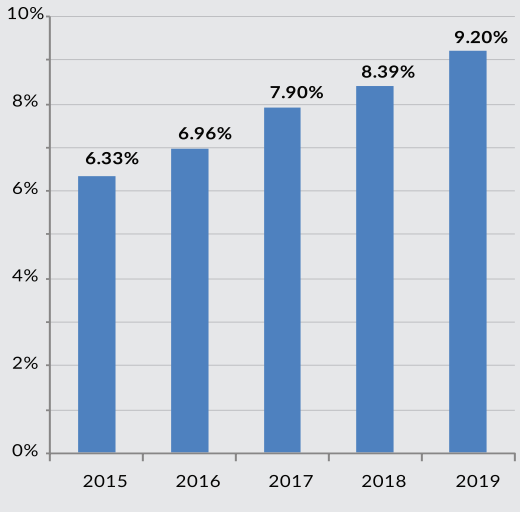


Source: Calculated according to Tourism Satellite Accounts (TSA) recommended by UNWTO

Tourism receipts from inbound tourism are considered tourism exports, which increased by 2.1 times during the period 2015-2019, from VND 197 thousand billion (USD 9 billion) in 2015 to VND 421 thousand billion (USD 18.3 billion) in 2019, recording an average annual growth of 20.9%.

Thanks to the rise of Viet Nam's economy, Vietnamese people have been capable of spending more for tourism purpose. Expenditure of domestic visitors considerably contributed to total tourism receipts of the country. From 2015 to 2019, tourism receipts from domestic tourism rose by 2.1 times (an average annual growth of 21.0%), while the number of domestic visitors increased only by 1.5 times in the same period.

Figure 1.9. Direct contribution of tourism to the GDP (%)



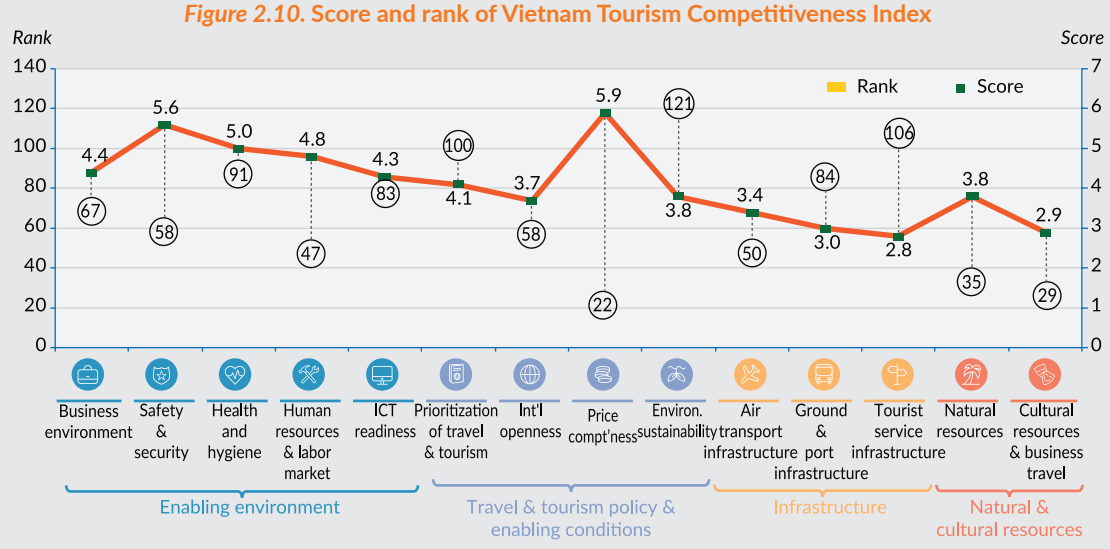
Source: Calculated by VNAT according to Tourism Satellite Accounts method recommended by the United Nations

The rapid growth of international and domestic visitors has led to the increased tourism receipts for the national economy. Direct contribution of tourism constituted significantly bigger proportions of the Gross Domestic Product (GDP): 6.3% in 2015 and 9.2% in 2019, a rise of 2.9 percentage points.

2015-2019: TOURISM COMPETITIVENESS OF VIET NAM SIGNIFICANTLY IMPROVED IN THE WEF' TOURISM COMPETITIVENESS INDEX RANKING

- According to the reports of the World Economic Forum (WEF), Vietnam tourism's competitiveness index jumps from 75th/141 economies (2015) to 63rd/140 (2019).
- The best indicators of Vietnam tourism include: Price Competitiveness (22nd/140), Cultural Resources and Business Travel (29th/140), Natural Resources (35th/140). In Southeast Asia, Viet Nam's Cultural Resources indicator ranks 2nd, standing just behind Indonesia; Natural Resources indicator ranks 3rd, behind Thailand and Indonesia.
- The most improved indicator is Visa Requirements, up by 62 places from 116th/136 (2017) to 53rd/140 (2019). The advancement of the indicator was driven by e-visa policy piloted by the Government since early 2017. By 2019, the policy was applied to the nationals of 80 countries.
- The low-rank indicators include: Environmental Sustainability (121st/140), Tourist Service Infrastructure (106th/140), Prioritization of Travel & Tourism (100th/140).

Figure 2.10. Score and rank of Vietnam Tourism Competitiveness Index



Note: the lower ranking position has the better performance

Source: World Economic Forum

REPUTABLE GLOBAL AND REGIONAL TOURISM AWARDS

In 2019, Viet Nam was internationally appreciated with reputable global and regional awards, including:

- World's Leading Heritage Destination
- World's Best Golf Destination
- Asia's Leading Destination
- Asia's Leading Cultural Destination
- Asia's Leading Culinary Destination

Viet Nam was honored the World's Best Golf Destination 2019

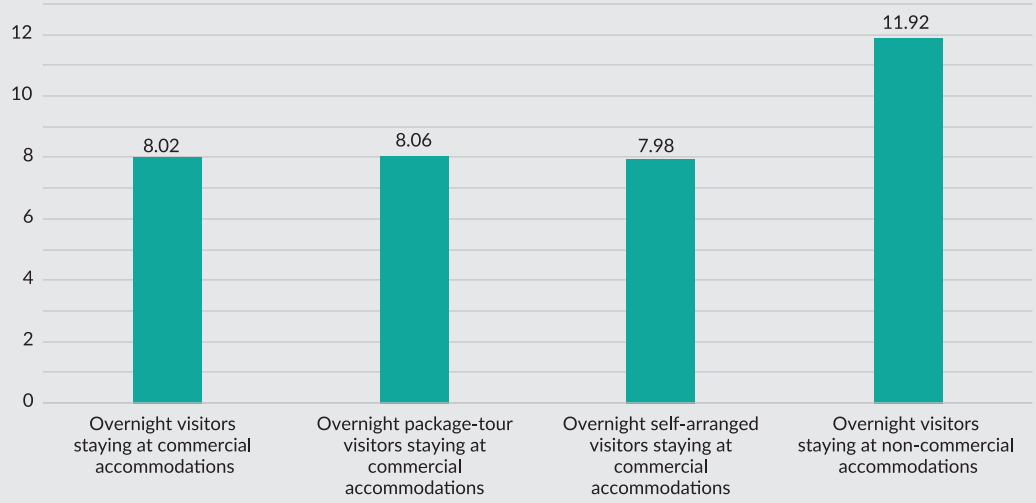
MAJOR OUTCOMES OF VNAT'S VISITOR SURVEY 2019

International visitors to Viet Nam

- Trip duration

Average trip duration per overnight international visitor staying at commercial accommodations was 8.02 days (7.02 nights). Of which, package-tour visitors spent 8.06 days; self-arranged visitors spent 7.98 days. Average trip duration per an overnight visitor staying at non-commercial accommodations was 11.92 days.

Figure 1.11. Average trip duration per international overnight visitor (days)



Source: VNAT's Survey of International Visitors 2019

- Average expenditure and trip duration

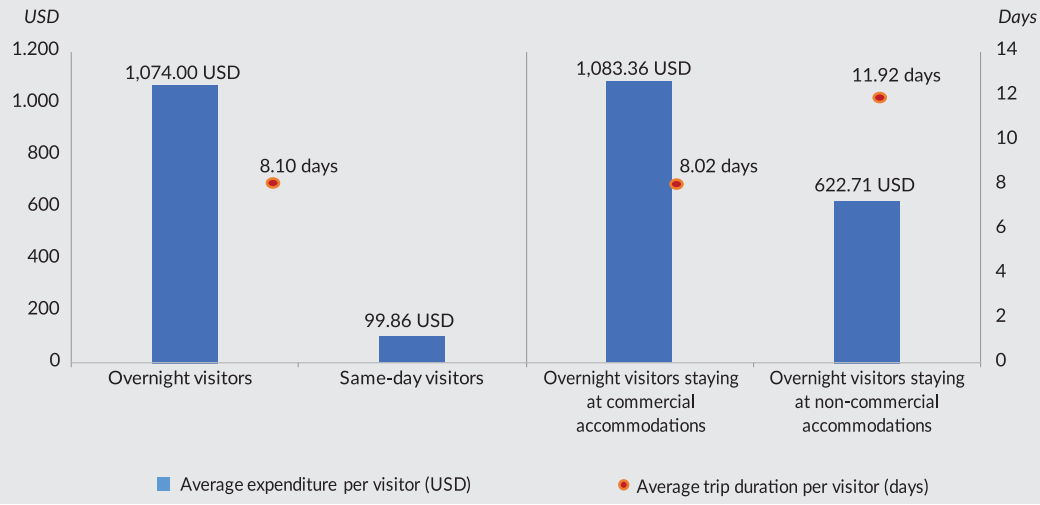
International overnight visitors spent an average USD 1,074 for a trip, stayed for 8.1 days; spent USD 132.6 per day.

Same-day visitors spent USD 99.86 on average.

Overnight visitors staying at commercial accommodations spent an average of USD 1,083.36, stayed for 8.02 days; spent USD 135 per day.

Overnight visitors staying at non-commercial accommodations (like homes of friends, relatives...) spent an average of USD 622.71 for 11.92 days.

Figure 1.12. Average expenditure and trip duration per international visitor to Viet Nam



Source: VNAT's Survey of International Visitors 2019

Figure 1.13. Breakdown of average expenditure per overnight international visitor to Viet Nam

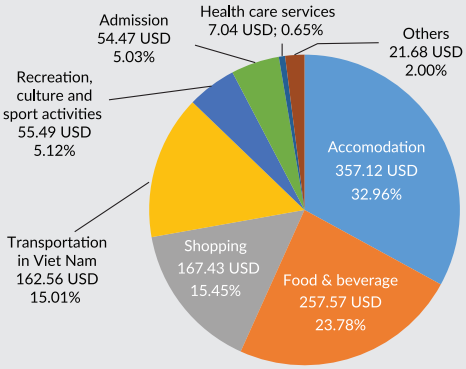
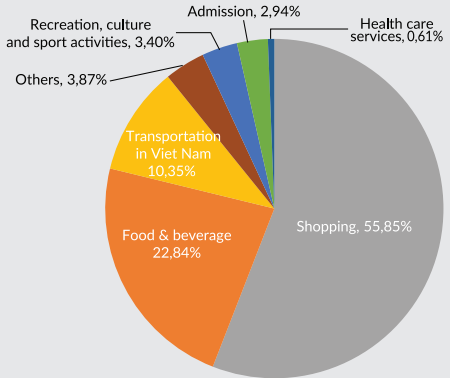


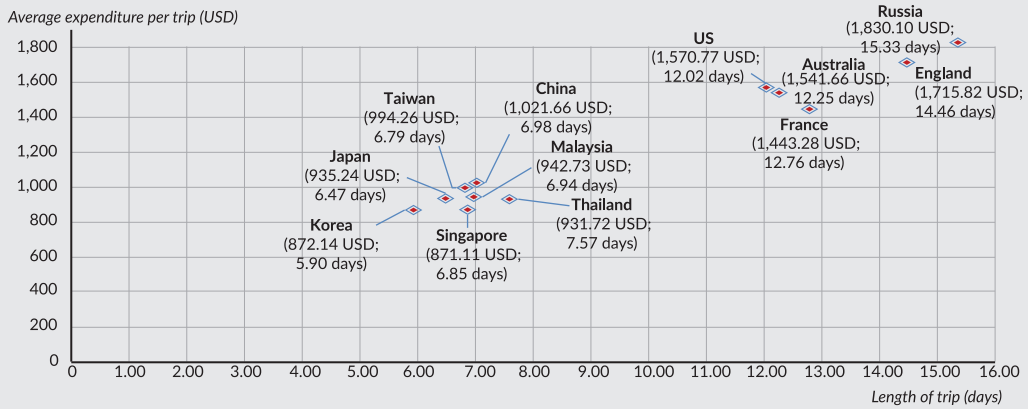
Figure 1.14. Breakdown of average expenditure per same-day international visitor to Viet Nam



- Average expenditure and trip duration of major markets

Visitors from long-haul markets tended to spend higher than those from short-haul markets, mainly because of their longer trip duration. Visitors from Russia took the lead with USD 1,830.10 for 15.33 days. It was followed by the UK (USD 1,715.82 for 14.46 days), USA (USD 1,570.77 for 12.02 days), Australia (USD 1,541 for 12.25 days), France (USD 1,443.28 for 12.76 days).

Figure 1.15. Average expenditure and trip duration of some major markets



Source: VNAT's Survey of International Visitors 2019

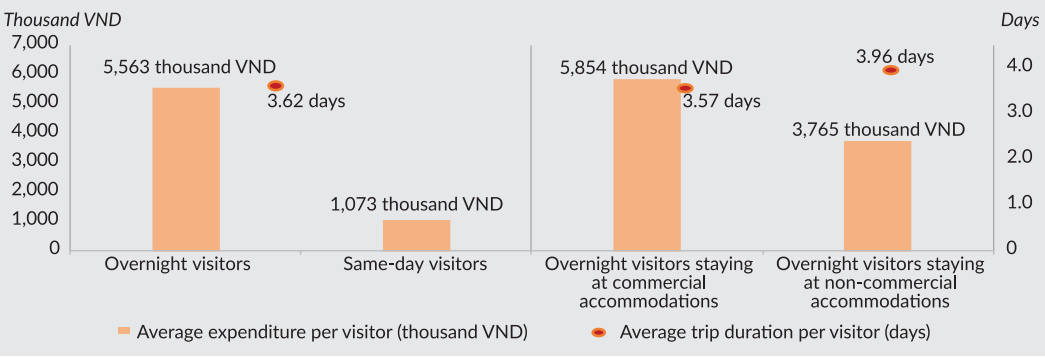
Domestic visitors

Domestic overnight visitors spent an average of VND 5,563 thousand for the trip of 3.62 days, an average daily expenditure of VND 1,537 thousand. Same-day visitors had an average expenditure of VND 1,073 thousand.

Overnight visitors staying at commercial accommodations had an average expenditure of VND 5,854 thousand for the trip duration of 3.57 days, an average daily expenditure of VND 1,640 thousand.

Overnight visitors staying at non-commercial accommodations (like homes of friends, relatives…) had an average expenditure of VND 3,765 thousand for the trip of 3.96 days.

Figure 1.16. Average expenditure and trip duration per domestic visitor



Source: VNAT's Survey of Domestic Visitors 2019

Sa Pa - a famous tourist destination in the North of Viet Nam

2

TOURISM POLICY & CAPACITY BUILDING

In 2019, the tourism sector continued to focus on the projects to implement the Resolution No. 08-NQ/TW of the Political Bureau on developing tourism into a key economic sector and other essential projects to meet the immediate demand of the facts.

KEY PROJECTS TO IMPLEMENT RESOLUTION 08-NQ/TW

- Strategy for Vietnam Tourism Development by 2030;
- Implementation Plan for the Project of Overall Application of Information Technology in the Tourism Sector for the Period 2018-2020 with Direction to 2025";
- Implementation Plan for the Project of Vietnam Tourism Restructure to Become a Key Economic Sector;
- Implementation Plan for the Project of Increasing the Efficiency of Tourism Marketing.

Deputy Minister Le Quang Tung chaired the meeting on Vietnam tourism's competitiveness index

IMPLEMENTING THE RESOLUTION No. 02/NQ-CP ON BUSINESS ENVIRONMENT AND NATIONAL COMPETITIVENESS

- Implementation Plan on Analyzing the Travel and Tourism Competitiveness Index and Improving the Indicator of Prioritization of Travel and Tourism.
- Guiding relevant ministries, sectors and localities to study the Travel and Tourism Competitiveness Index and improve the indicator of Prioritization of Travel and Tourism.
- Assessing the digital demand for cultural and entertainment tourism.

LEGAL DOCUMENTS APPROVED BY THE MINISTER OF CULTURE, SPORTS AND TOURISM

- Circular No. 13/2019/TT-BVHTTDL dated 25 November 2019 on amendment of some articles of Circular No. 06/2017/TT-BVHTTDL dated 15 December 2017 regulating in details some articles of Tourism Law.
- Decision No. 3720/QĐ-BVHTTDL dated 28 October 2019 releasing Regulation on the management and operation of tourist apartment, tourist villas.

INTRODUCING LEGAL DOCUMENTS AND IMPROVING TOURISM MANAGING CAPACITY

- Organizing training courses on tourism management for officials of provincial tourism departments and relevant ministries and sectors; guiding universities and colleges to organize examinations and certification for tour operators and tour guides;
- Coordinating with Ministry of Transport to organize training courses on ensuring traffic safety for foreigners in Viet Nam;
- Organizing training courses on responsible tourism for officials and tour guides in the Central Highland's provinces.

Dray Nur Waterfall (Dak Lak)

RECOGNITION OF NATIONAL TOURIST AREA

Ministry of Culture, Sports and Tourism recognized one national tourist area:

Decision No. 1501/QĐ-BVHTTDL dated 24 April 2019 by Ministry of Culture, Sports and Tourism recognizing Tra Co National Tourist Area, Mong Cai City, Quang Ninh Province.

Tra Co Beach (Quang Ninh)

Ba Na Hills Golden Bridge (Da Nang City)

3

TRAVEL & TRANSPORTATION

The year 2019 witnessed a strong growth of travel enterprises. State management over travel business was being reinforced to ensure service quality, diversify tourist products, contributing to fulfill the tourism sector's growth targets.

2,667
Inbound and outbound tour operators

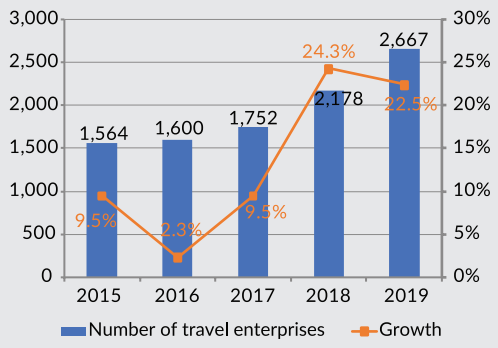
27,683
Tour guides

80%
Of total international visitors travelling to Viet Nam by air

NUMBER OF TRAVEL ENTERPRISES INCREASED SHARPLY

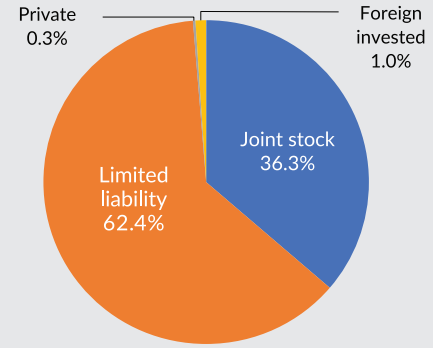
- Favorable business environment and regulations on travel business facilitated the rapid increase of newly-established travel enterprises.
- In 2019, VNAT evaluated over 1,000 profiles of new issuance, change, re-issuance and withdrawal of inbound and outbound tour operator licenses. By 2019, the total number of inbound and outbound tour operators recorded 2,667, representing a year-on-year increase of 22.5% and 1,103 ones more than the number of 2015. Of which, the number of limited and joint stock companies occupied the largest proportions of 62.4% and 36.3% respectively.
- VNAT worked closely with functional authorities to foster the inspection over travel business activities to ensure business environment and service quality.
- VNAT monitored training establishments organizing examination and certificating tour operation skills.

Figure 3.1. **Number and growth of inbound and outbound tour operators (2015-2019)**



Source: VNAT

Figure 3.2. **Proportions of inbound and outbound tour operators by types of enterprises (by end of 2019)**

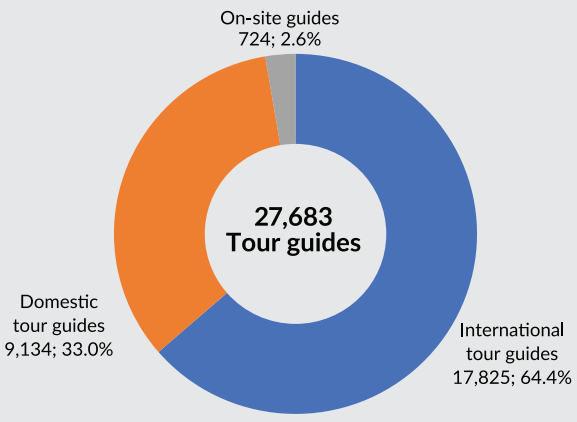


Source: VNAT

IMPROVEMENT IN THE NUMBER AND QUALITY OF TOUR GUIDES

- By 2019, there were 27,683 tour guides, up by 15% over 2018, including 17,825 international tour guides, 9,134 domestic tour guides and 724 on-site guides.
- Tour guides with university and higher degees accounted 71.3%, with college degrees 18%, with other degrees 10.7%.
- VNAT organized training courses on tour guiding in provinces of Lam Dong, Gia Lai, Kon Tum, Dak Lak, Dak Nong...; supported some provinces to organize contests on tour operating and tour guiding skills; monitored training establishments who organized contests on tour guiding skills and issued certifications.

Figure 3.3. **Licensed tour guides by 2019**

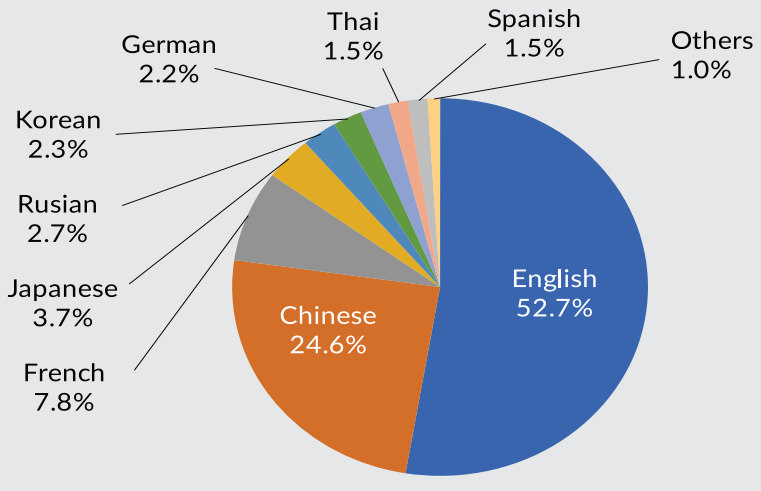


Source: VNAT

ENHANCING MANAGEMENT OF TOURIST SITES

- Guiding local tourism authorities to implement Tourism Law 2017, Decree No. 168/NĐ-CP of the Government, Circular No. 06/2017/TT-BVHTTDL and Circular No. 13/2019/TT-BVHTTDL of Ministry of Culture, Sports and Tourism regulating in details some rules in Tourism Law 2017.
- Supporting localities to implement the Prime Minister's Directive 18/CT-TTg dated 04 September 2013 on strengthening management over tourism environment and ensuring safety for tourists; and Directive 14/CT-TTg dated 02 July 2015 on fostering state management effectiveness in tourism sector and resolving weaknesses to accelerate tourism development.

Figure 3.4. **Proportion of valid international tour guides by languages used, by 2019**



Source: VNAT

AIR TRANSPORTATION PLAYED A KEY ROLE

- In 2019, approximately 80% of total overseas visitors travelled to Viet Nam by air, considerably higher than the world's average rate of 58% (UNWTO).
- According to the Travel & Tourism Competitive ness Report 2019 by the World Economic Forum (WEF), Viet Nam's air transport infrastructure in dicator improved from 61st/141 (2017) to 50th/140 (2019), driven by the growth of operat ing airlines number, domestic and international available seat kilometers and aircraft departures.

  On the other hand, quality of air transport infrastructure decreased from 85th/141 to 99th/140; airport density ranked low at 96th/140, showing an urgent need of enhancing air transport infrastructure to meet the increasing travel demand.
- There are 22 operating airports in Viet Nam, including 11 international ones and 11 domestic ones. According to Civil Aviation Administration of Viet Nam, in 2019, Viet Nam's airports welcomed 115.5 million passengers, up by 11.4% over 2018.
- For international air routes, 71 foreign airlines and 4 Vietnamese airlines (Vietnam Airlines, Vietjet Air, Jetstar Pacific Airlines and Bamboo Airways) are operating nearly 140 international air routes directly connecting Viet Nam with 28 countries/territories.
- For domestic air routes: Vietnamese airlines are operating more than domestic 50 routes; tranporting over 55 million passengers in 2019, increasing by 11.4% over 2018, occupying nearly a half of air trans portation market share in Viet Nam.

  IATA forecasted that Viet Nam, during 2019-2035, would be the 5th world fastest-growing aviation market and the fastest average annual growth in Southeast Asia with the rate of 14%, reaching the volume of 150 million passengers by 2035.

CLOSER COOPERATION BETWEEN TOURISM AND AVIATION

- In 2019, VNAT signed strategic cooperation agreements with 2 major players in the aviation market, Vietnam Airlines and Vietjet Air. The agreements included joint tourism promotion programs in overseas markets, facilitation for foreign travelers to Viet Nam.

- Airliners closely worked with VNAT and tourism enterprises to participate in international travel marts, organize tourism roadshows abroad, host FAM/Press trips for foreign enterprises and press agencies to Viet Nam.

Signing ceremony on strategic cooperation between VNAT and Vietnam Airlines

LAND TRANSPORTATION STILL NEEDS FURTHER IMPROVEMENT

- According to the WEF's Travel & Tourism Competitiveness Report 2019, the road density of Viet Nam ranked 41st/140 but the quality of roads ranked low at 109th/140, decreasing by 21 places in comparison to 2017. The quality of railroad infrastructure decreased by 15 places to 63rd/140.

- Caravan tours gained strong interest from travel companies, focusing on the routes connecting Viet Nam with China and some other countries in Southeast Asia.

- Railway industry made considerable effort to improve service quality, enhance cooperation with travel companies to attract tourists. Nonetheless, that the number of tourist passengers using trains was still low required further improvement of railway infra-structure and service quality.

SEA TRANSPORTATION SAW POSITIVE GROWTH

- In 2019, there were 264,115 international visitor arrivals to Viet Nam by sea, representing a y-o-y increase of 22.7%.
- Viet Nam boasts a long coastline with many beautiful cities by seaside and has become a popular destination in the international itineraries of prestigious cruise liners. It would be necessary to build tourism seaports to attract more these high-spending tourists.
- In 2019, Sun Group opened Ha Long International Cruise Port in Quang Ninh Province, which was capable of receiving big cruise ships. The birth of the port plays an important role to Quang Ninh and Vietnam cruise tourism.

  However, more cruise ports would be needed at the other tourist hubs. Viet Nam's competitive ness indicator of port infrastructure quality only ranked 80th/140 in 2019, 3 places lower than that of 2017.

Ha Long International Cruise Port (Quang Ninh)

CONTINUING TO PROMOTE DOMESTIC WATERWAY TOURISM

Viet Nam has a dense network of rivers and canals, which facilitates the development of domestic waterway tourism, particularly in the Mekong Delta with famous products like garden tourism, floating markets, etc. Some localities has upgraded their port infrastructure in service of domestic waterway tourism.

Nowadays, domestic waterway tourism has been improved with integrated services including sight-seeing, staying overnight on boats, visiting gardens and floating markets, enjoying food and beverage, entertainment, recreation and water-based sports activities.

However, Viet Nam's Mekong Delta is coping with severe climate change, drought and saltwater intrusion, posing a threat to the conservation of tourism resources in the region.

Tuan Chau International Port (Quang Ninh)

Hotel De La Coupole - MGallery (Sa Pa, Lao Cai)

4

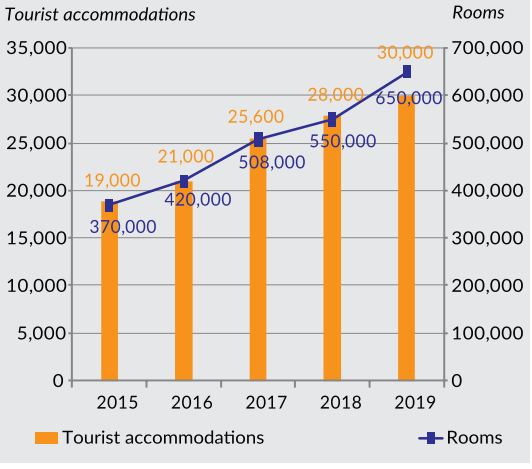
TOURIST ACCOMMODATION

In 2019, the tourist accommodation of Viet Nam continued its expansion towards moderness, synchroneity, in accordance with international standards, with further investment from strategic investors and the participation of reputable international brands to meet diverse demands of the international and domestic markets.

SYSTEM OF TOURIST ACCOMMODATIONS RECORDED POSITIVE DEVELOPMENT, PARTICULARLY FOR THE HIGH-END SEGMENT

By 2019, the number of total tourist accommodations nationwide was about 30,000 establishments with 650,000 rooms, increasing by about 2,000 establishments and 100,000 rooms over 2018.

Figure 4.1. **Number of tourist accommodations and rooms, 2015-2019**



Source: VNAT

During 2015-2019, the number of tourist accommodations went up by 1.58 times, from 19,000 to 30,000 (an average annual growth of 12.0%); the number of rooms increased by 1,76 times, from 370,000 to 650,000 (an average annual growth of 15.1%).

The growth of rooms was faster than that of tourist accommodations, which reflected the fact that there were more large-scale and high-end tourist accommodations with the capacity of serving bigger groups and high-spending visitors. The investors tended to hire professional management companies to operate their properties.

The rapid growth of domestic and international visitors triggered an investment wave into the tourist accommodation sector at tourist centers, with the involvement of such leading domestic groups as Sun Group, Vingroup, FLC, BIM... Especially, Khanh Hoa, in 2019 alone, launched 6,000 new rooms. The followings were Da Nang with 4,500 new rooms and Phu Quoc with 3,000 new rooms.

There number of 4-5 star tourist accommodations was 484 with over 100,000 rooms, representing an increase of 13.0% and 12.2% over 2018 respectively.

Table 4.1. **Number of 4-5 star tourist accommodations, 2018-2019**

No.	Tourist accommodations	No. of Accommodations			No. of rooms		
		2018	2019	Growth (%)	2018	2019	Growth (%)
1	5 star hotels	142	165	16.2%	47,905	55,054	12.8%
2	4 star hotels	272	302	11.0%	36,012	40,093	11.3%
3	5 star tourist apartments	10	13	30%	3,905	5.392	38.1%
4	5 star tourist apartments	4	4	0%	742	742	0%
	Total	**428**	**484**	**13.0%**	**88,564**	**100,281**	**13.2%**

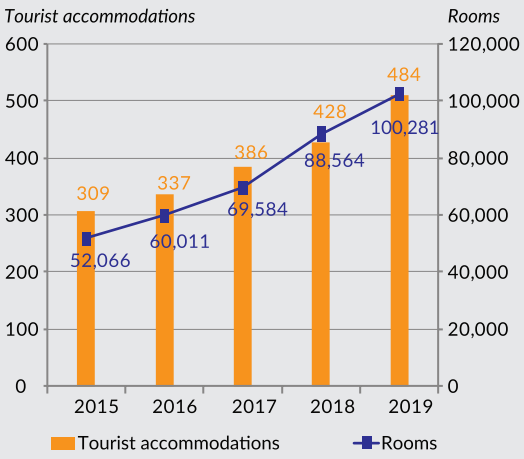
Source: VNAT

Notably, there was an emergence of world-leading luxury resorts in some famous tourist destinations like Da Nang, Hoi An, Phu Quoc..., drawing high-end tourists and celebrities who loved to experience outstanding services. In addition, a new wave of all-in-one resorts and leisure and entertainment complexes rose, offering tourists with full services from food and drinks, accommodation, leisure and entertainment, sight-seeing...

Other types of accommodation becoming more and more popular include airbnb, homestay, boutique hotel, timeshare...

The influence of digital technology in tourist accommodation business has become bigger with the increased online booking, smart technology, e-payment applied in hotel management and operation.

Figure 4.2. **Number of 4-5 star tourist accommodations and rooms, 2015-2019**



Source: VNAT

49 TOURIST ACCOMMODATION ESTABLISHMENTS WERE RANKED 4-5 STAR IN 2019

- In 2019, 49 tourist accommodations with more than 10,000 rooms were classified 4-5 star by VNAT. Tay Ninh and Ha Giang provinces had 4-5 star tourist accommodations for the first time, adding to the total of 41/63 cities and provinces having 4-5 star tourist accommodations with 100,281 rooms (15% of the total rooms). 4-5 star segment shares an increasing proportion in Southern Central provinces, Phu Quoc Island and other tourist centers (Ha Noi, Ho Chi Minh City, Quang Ninh...)
- 22 cities and provinces having new 4-5 star tourist accommodations in 2019 included Binh Duong (2), Binh Thuan (2), Can Tho (1), Da Nang (7), Ha Giang (1), Ha Nam (1), Ha Tinh (1), Hai Phong (1), Kien Giang (2), Khanh Hoa (7), Lang Son (1), Lao Cai (2), Lam Dong (2), Phu Yen (1), Quang Binh (2), Quang Nam (1), Quang Ninh (6), Tay Ninh (1), Thanh Hoa (1), Thua Thien Hue (1), Ha Noi (2), Ho Chi Minh City (2).
- Vingroup took the lead with 9 new 5-star hotels and tourist apartments with 2,800 rooms.

In 2019, the system of tourist accommodation establishments actively joined in servicing significant events, including the US - DPRK Summit in Ha Noi, ASEAN Tourism Forum (ATF) 2019 in Ha Long, United Nations Day of Vesak Celebrations 2019 and many other important ones, which proved the role, position and ability of Viet Nam to host big events of the world.

FLC Grand Ha Long Hotel (Quang Ninh)

TOURIST ACCOMMODATIONS RANKING FROM 1-3 STAR

It has been 2 years since the validity of the Tourism Law 2017 which regulates that the registration for the ranking of tourist accommodations is voluntary.

The number of certified registrations for ranking of 1-3 star tourist accommodations saw a decrease.

Many accommodations only informed their standard qualification for tourist accommodation business, without registration for the ranking certification to the relevant authorities.

By 2019, there were more than 5,400 1-3 star tourist accommodations, with over 162,024 rooms, down by 14.1% and 7.7% respectively over 2018.

The number of qualified tourist accommodations went up significantly over 2018, recording 16,300 accommodations and 237,000 rooms (up by 73% and 150% respectively).

Table 4.2. **Number of 1-3 star tourist accommodations nationwide, by 2019**

No.	Tourist accommodations	No. of Acc. (2019)	Growth 19/18 (%)	No. of rooms (2019)	Growth 19/18 (%)
1	3 star hotels	446	-17.4%	37,841	-1.4%
2	2 star hotels	1,253	-22.8%	51,395	-11.3%
3	1 star hotels	3,524	-9.7%	70,548	-8.2%
4	2 star tourist apartments	1	0.0%	22	10.0%
5	1 star tourist apartments	3	-50.0%	80	-76.2%
6	2 star tourist boats	80	-23.1%	1,323	-1.8%
7	1 star tourist boats	93	-14.7%	815	2.9%
	Total	**5,400**	**-14.1%**	**162,024**	**7.7%**

Source: VNAT

AVERAGE ROOM RATE RECORDED 52%

The average room occupancy in 2019 recorded 52%, slightly lower than the previous year (54%). The decrease might result from the larger increased supply compared to the increased demand and the decreased length of stay.

Localities recording strong growth of tourist accommodations like Da Nang, Khanh Hoa, Phu Quoc witnessed a decrease of room occupancy, sometimes below 50%. Ha Noi and Ho Chi Minh City recorded moderate growth of room number and relatively high occupancy of over 60%.

Provinces in the Central region has the average room occupancy of over 50%. Northern provinces including Ha Nam, Hai Duong, Bac Ninh, Nam Dinh, Phu Tho, Tuyen Quang recorded the rate of around 50%.

Melia Ho Tram Beach Resort (Ba Ria - Vung Tau)

TOURISM MANAGEMENT WAS STRENGTHENED

- Continuing to introduce and guide the implementation of Tourism Law 2017 and relevant legal documents.
- Proposing Minister of Culture, Sports and Tourism to release regulations on management and operation of tourist apartments, tourist villas, condotels.
- Building national standards on tourist villas and MICE tourism - venue requirements for hotels and study on management solutions for condotels and timeshares.
- Organizing training courses on hotel and home stay expertise in the provinces of Cao Bang, Ben Tre, Kon Tum, Phu Tho, Lam Dong, Ha Nam, Lang Son.
- Organizing National Bartender Contest in Ho Chi Minh City for the first time, attracting active participation of 66 contestants from 33 establishments in 11 cities and provinces.
- Coordinating with Khanh Hoa People's Committee to organize National Cuisine Festival – Nha Trang 2019 under the theme "The Quintessence of Vietnamese Cuisine". The festival was an activity under the umbrella of the Visit Viet Nam Year - Nha Trang - Khanh Hoa 2019.
- Organizing workshops and exhibitions on using environmental friendly products in tourist accommodations and tourist sites in the South.

Vietnam Tourism's Booth in TRAVEX 2019

5

TOURISM
PROMOTIONAL ACTIVITIES

In 2019, tourism promotion efficiency continued to be enhanced by fostering public-private partnership (PPP), boosting resources mobilization from different sources, promoting the role of tourism ambassadors with creative campaigns, accelerating digital marketing. Tourism marketing was also actively involved by relevant ministries, sectors, tourism associations, localities and enterprises.

OVERSEAS TOURISM PROMOTION

Overseas tourism promotion focused on short-haul destinations in Asia, especially Northeast Asia, Southeast Asia and India to support high growth; continued to attract high-spending and long-stay visitors from long-haul destinations in Europe, North America, Russia, Australia…

Northeast Asia

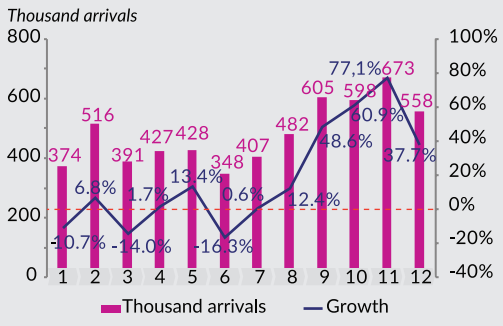
China

- **Recording 5.8 million arrivals, a 16.9% growth and a share of 32.2% of the total arrivals.**
- **Chinese arrivals increasing by 3.3 times from 2015-2019, an average annual growth of 34.4%.**

Major promotional activities:

- Beijing International Tourism Expo (BITE) in Beijing; China - ASEAN Tourism Exhibition in Guilin; Shandong International Tourism Fair in Shandong.
- Vietnam Tourism Roadshows in Chengdu (Sichuan), Chongqing and Shenzhen (Guangdong).

Figure 5.1. **Chinese visitors to Viet Nam by month, 2019**



Source: Compiled from the data of GSO

Figure 5.2. **Chinese visitors to Viet Nam by year, 2015-2019**

Source: Compiled from the data of GSO

Chinese visitors to Viet Nam increased very slowly in the first 8 months of 2019 (+0.9%), even decreased in 3 months. However, the number quickly bounced back to the strong growth of 55.6% in the last 4 months, which helped to leverage the growth momentum of the whole year.

South Korea

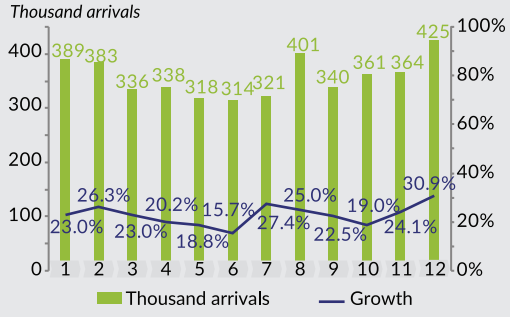
- Achieving very high growth of 23.1% with 4.3 million arrivals, accounting for 23.8% of the total arrivals.

- South Korean visitors to Viet Nam increasing by 3.9 times from 2015-2019, an average annual growth of 40.1% - the highest among the source markets of Viet Nam.

Major promotional activities:

- HanaTour International Travel Show.
- Vietnam Tourism Roadshows in Seoul and Daegu on the occasion of Vietnam Festival in South Korea.
- Coordinating with Vietnam Tourism Ambassador Lee Chang-kun to open Vietnam's Tourism Promotion Office in South Korea.

Figure 5.3. South Korean visitors to Viet Nam by month, 2019



Source: Compiled from the data of GSO

Figure 5.4. South Korean visitors to Viet Nam by year, 2015-2019

Source: Compiled from the data of GSO

- The number of South Korean visitors to Viet Nam in 2019 rose by 23.1%. This was an impressive growth in the context of that South Korean outbound departures continuously decreased from August to December, recording a growth rate of only 0.1% growth in 2019.

- Viet Nam has become an appealing destination for South Korean visitors, boosted by a tightened relationship in many social and cultural aspects and air route expansion between the 2 sides.

Japan

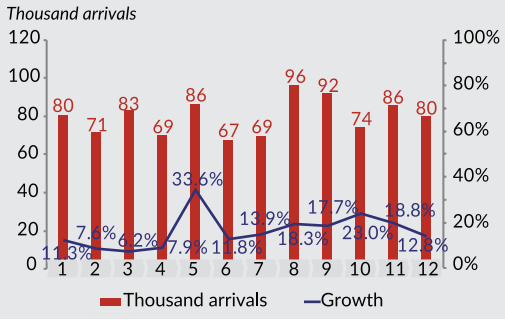
- Increasing by 15.2% with 952 thousand arrivals.

- 1.4 times increase from 2015-2019, an average annual growth of 9.1%.

Major promotional activities:

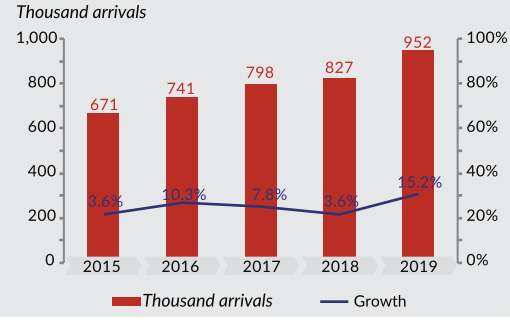
- Vietnam Tourism Roadshows in Tokyo, Kanagawa and Hokkaido on the occasion of Vietnam Festival in Japan.
- JATA Tourism Expo Japan.

Figure 5.5. Japanese visitors to Viet Nam by month, 2019



Source: Compiled from the data of GSO

Figure 5.6. Japanese visitors to Viet Nam by year, 2015-2019



Source: Compiled from the data of GSO

In 2019, Japanese visitors increased steadily in early months, sharply rose (+33.6%) in May and maintained high growth in the remaining months of the year. Japanese arrivals tended to increase steadily from 5%-10% annually. 2019 recorded the highest number in the last 5 years.

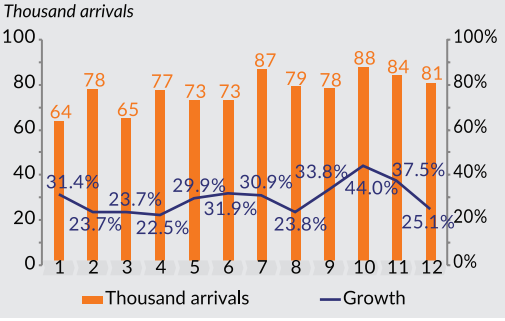
Taiwan

- **Growing at very high rate of 29.8% with 927 thousand arrivals.**
- **Increasing by 2.1 times from 2015-2019, an average annual increase of 20.5%.**

Major promotional activities:

Presentation of Vietnam Tourism and Cuisine at Taiwan Culinary Exhibition in Taipei.

Figure 5.7. Taiwanese visitors to Viet Nam by month, 2019



Source: Compiled from the data of GSO

Figure 5.8. Taiwanese visitors to Viet Nam by year, 2015-2019

Source: Compiled from the data of GSO

Visitors from Taiwan maintained high growth all year round, particularly in October (+44.0%). This was considered an impressively high growth in comparison with 2019's growth of Taiwanese outbound departures (+2.7% with 17.1 million departures).

Southeast Asia

The number of visitors from Southeast Asia saw a sharp rise in 2019, especially visitors from Thailand, which could be a signal of a growing trend from short-haul destinations in the region.

Major promotional activities:

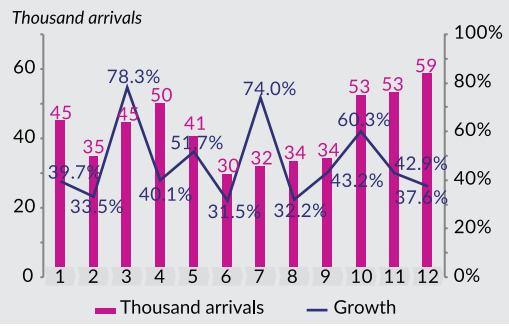
- Vietnam Tourism Roadshows in the Philippines, Indonesia.
- Promotional campaign to connect land tours along the Southern Corridor, including the major destinations in Viet Nam, Cambodia, Thailand and Myanmar.

Thailand

- Recording exceptionally high growth of 45.9% with 510 thousand arrivals.

- Increasing by 2.4 times from 2015-2019, an average annual increase of 24.1%.

Figure 5.9. Thailand visitors to Viet Nam by month, 2019



Source: Compiled from the data of GSO

Figure 5.10. Thailand visitors to Viet Nam by year, 2015-2019

Source: Compiled from the data of GSO

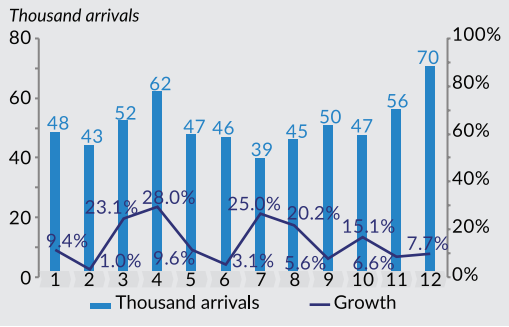
The growth of Thai visitors was the most impressive among Vietnam tourism's source markets. Thailand maintained exceptionally high growth throughout the year 2019, of which the peaks were March (+78.3%), July (+74.0%) and October (+60.3%). The sharp growth was driven by the attractive destinations of Viet Nam to Thai visitors including Da Nang, Da Lat, Sa Pa..., convenient air transport, strengthened tourism cooperation and promotion between Viet Nam and Thailand.

Malaysia

- Increasing by 12.2% with 606 thousand arrivals.

- Rising by 1.7 times from 2015-2019, an average annual growth of 15.0%.

Figure 5.11. Malaysian visitors to Viet Nam by month, 2019



Source: Compiled from the data of GSO

Figure 5.12. Malaysian visitors to Viet Nam by year, 2015-2019

Source: Compiled from the data of GSO

The Malaysian market achieved a very high growth in March (+23.1%), April (+28.0%), July (+25.0%) and August (+20.2%). Malaysia has been the largest source market of Viet Nam in Southeast Asia.

Besides, other markets in the region significantly increased: Indonesia (+21.3%), the Philippines (+18.2%) and Singapore (+7.9%).

Europe

Western Europe (The UK, Germany, France, Italy and Spain)

Major promotional activities:

- FITUR International Tourism Fair in Madrid, Spain.
- ITB Berlin Travel Trade Show in Germany: Vietnam Tourism's booth covering an area of 500m^2.
- World Travel Market (WTM) London in the UK with Vietnam Tourism's booth of 250m^2.

Table 5.1. **Visitors from some major Western European markets to Viet Nam, 2015-2019 (Arrivals)**

Markets	2015	2016	2017	2018	2019	19/18 Change	Avg. annual growth 2015-2019
UK	212,798	254,841	283,537	298,114	315,084	5.7%	10.3%
France	211,636	240,808	255,369	279,659	287,655	2.9%	7.9%
Germany	149,079	176,015	199,872	213,986	226,792	6.0%	11.0%
Spain	44,932	57,957	69,528	77,071	83,597	8.5%	16.8%
Italy	40,291	51,265	58,041	65,562	70,798	8.0%	15.1%

Source: Compiled from the data of GSO

The above 5 markets are of significant importance to Vietnam tourism with high spending and long-stay tourists, and have been exempted from visa requirement to Viet Nam. Vietnam tourism annually participated in big international travel trade shows in this region. Thanks to the efficiency of the public-private partnership (PPP), Vietnam tourism's booth has become significantly larger and professional, attracting the attention of international visitors and facilitating trading activities.

Russia

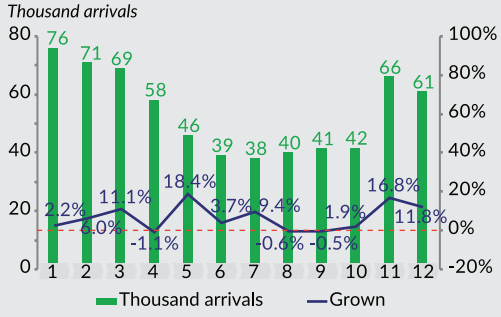
- Recording 6.6% growth with 647 thousand arrivals.

- Increasing by 1.9 times from 2015-2019, an average annual growth of 17.5%.

Major promotional activities:

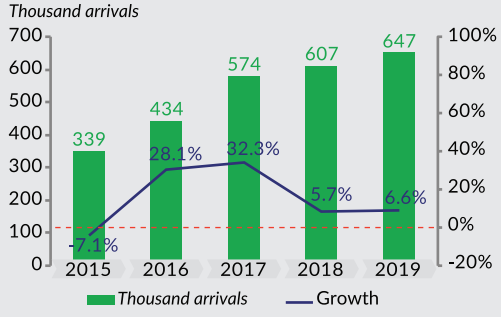
- MITT international travel show in Moscow, Russia.
- Vietnam Tourism Roadshows in Moscow and Vladivostok.

Figure 5.13. Russian visitors to Viet Nam by month, 2019



Source: Compiled from the data of GSO

Figure 5.14. Russian visitors to Viet Nam by year, 2015-2019



Source: Compiled from the data of GSO

The market recorded negative growth in 3 months (April, August, September) and high growth in 2 months (May: +18.4%; November: +16.8%). Totally, Russian visitors only slightly increased in 2019.

The USA

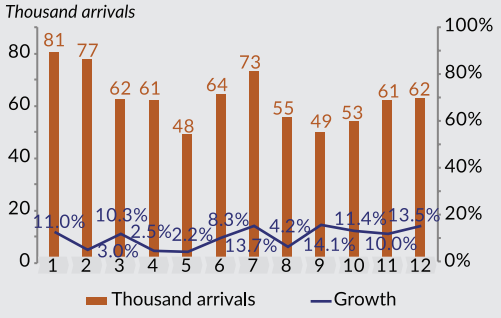
- Growing 8.6% with 746 thousand arrivals.

- Increasing by 1.5 times from 2015-2019, an average annual increase of 11%.

Major promotional activities:

Vietnam Tourism Roadshow in the USA on the sideline of the American Society of Travel Agents' Global Convention 2019.

Figure 5.15. American visitors to Viet Nam by month, 2019



Source: Compiled from the data of GSO

Figure 5.16. American visitors to Viet Nam by year, 2015-2019

Source: Compiled from the data of GSO

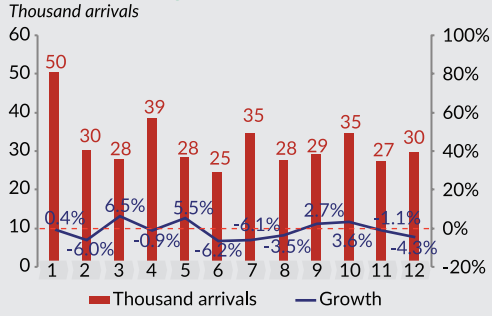
In 2019, American visitors peaked at the beginning of the year (January, February) and in summer (June, July). The American market has always been in the 5 leading source markets of Viet Nam over the past years. The strengthened promotional activities and possible direct flights between Viet Nam - USA could facilitate the growth of American visitors to Viet Nam.

Australia

Major promotional activities:

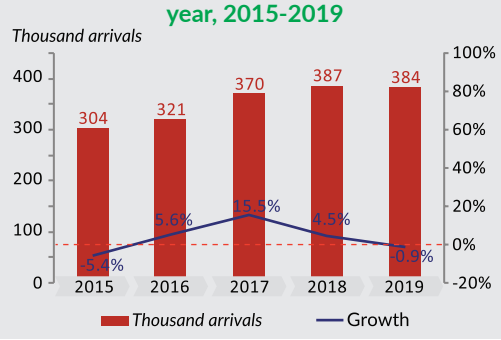
Vietnam Tourism Roadshows in Sydney, Melbourne and Perth.

Figure 5.17. Australian visitors to Viet Nam by month, 2019



Source: Compiled from the data of GSO

Figure 5.18. Australian visitors to Viet Nam by year, 2015-2019



Source: Compiled from the data of GSO

In 2019, Australian visitors to Viet Nam slightly decreased (-0.9%) with 384 thousand arrivals. The market maintained stable growth in the previous year. From 2015-2019, Australian visitors increased by 6.0% per year on average.

India

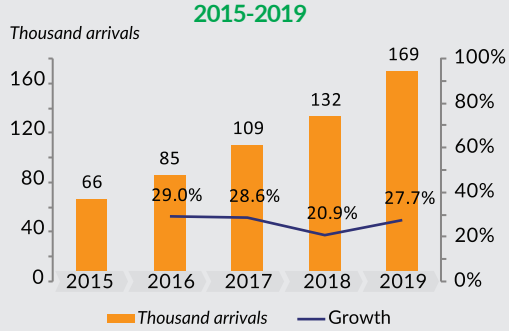
Major promotional activities:

- Viet Nam Trade - Investment - Tourism Promotion Forums in Kolkata, Mumbai, New Delhi and Bengaluru.
- ASEAN - India Business Summit.

Figure 5.19. Indian visitors to Viet Nam by month, 2019

Source: Compiled from the data of GSO

Figure 5.20. Indian visitors to Viet Nam by year, 2015-2019



Source: Compiled from the data of GSO

In 2019, the number of Indian visitors to Viet Nam saw a rapid growth of 27.7% with 169 thousand arrivals, exceptionally high in October (+39.7%), November (+40.4%) and December (+50.9%), recording an average annual growth of 26.7% from 2015-2019.

The growth was accelerated by the opening of direct flights of IndiGo (since October 2019) and of Vietjet Air (since December 2019). India is a populated country and would be a big potential market of Vietnam tourism.

MAJOR ACTIVITIES IN VIET NAM

- **The Visit Viet Nam Year 2019 - Nha Trang, Khanh Hoa under the theme "Nha Trang - Colors of the Sea" offered many attractive activities organized throughout the year by Ministry of Culture, Sports and Tourism, Khanh Hoa Province and other relevant cities/provinces. Major activities could be named Sea Tourism Festival "Symphony of the Sea 2019", Nha Trang - Khanh Hoa Sea Festival Week 2019, Miss Universe Viet Nam 2019...**

- The World Travel Awards' Asia & Oceania Gala Ceremony 2019 on the pristine island of Phu Quoc, Kien Giang in October. On the occasion, Viet Nam introduced outstanding values of culture and nature, charming destinations and world-leading hotels and resorts to international friends and partners.

- The Travel Exchange (TRAVEX) 2019 lasted from 16-18 January 2019 in Ha Long, Quang Ninh in the framework of ASEAN Tourism Forum (ATF) 2019. The event attracted 340 buyers from 53 countries/territories; 640 sellers from ASEAN countries; 351 tourist booths, of which Viet Nam had 95 booths; nearly 200 reporters, of which there were 120 foreign ones from 31 countries/territories. There were some 10,000 direct meetings between sellers and buyers and more than 70 events organized.

- International Travel Expo in Ho Chi Minh City-ITE HCMC 2019 (5-7 September 2019) under the theme "Your Gateway to Tourism in Asia". The Expo attracted 300 buyers, 350 sellers and 35,000 visitors.

- Promotion of Vietnam tourism on the occasion of the USA - DPRK Summit in February in Ha Noi. The Summit was of global significance, luring the attention of the whole world and thousands of international reporters and journalists around the world.

- Viet Nam International Travel Mart - VITM Ha Noi 2019 (27-30 March) under the theme "Green Tourism". VITM Ha Noi 2019 attracted more than 500 booths of 47 cities and provinces of Viet Nam and 27 countries/territories.

- Viet Nam International Travel Mart - VITM Can Tho 2019 (29 November - 01 December) under the theme "Mekong Delta Tourism joins country's destinations". VITM Can Tho 2019 attracted 320 booths of 350 enterprises and tourism promotion organizations from 6 countries and 25 cities/provinces of Viet Nam.

Cooperation signing ceremony between VNAT and iDEA on Application of Advanced Digital Technology and E-commerce for Tourism Development (September 2019)

6

DIGITAL TECHNOLOGY APPLICATION IN TOURISM

In 2019, the tourism sector focused on implementing the direction of the Prime Minister on information and communication technology (ICT) application and actively approaching the 4th Industrial Revolution. Many ICT activities were carried out, bringing added values to tourist products and services and improving the efficiency of state management, and enhancing tourist experience.

CONTEXT

The 4th Industrial Revolution has significantly been impacting all the aspects of the society, including tourism.

The advancement of digital technology has resulted in tremendous changes in the operation of the tourism sector. Digital technology can provide access to the information to all tourists around the world, pressing tourism enterprises to change the way they market and provide their products and services, and requiring new appropriate management manner in a new era.

GUIDANCE AND DIRECTION

› Directive 16/CT-TTg dated 4 May 2018 of the Prime Minister on strengthening capability approaching the 4th Industrial Revolution, in which development of smart tourism is a priority.

› Decision 1671/QĐ-TTg dated 30 November 2018 of the Prime Minister approving the Master Plan on information and communication technology application in the tourism sector for the period 2018-2020 with direction to 2025. The Master Plan cites that information and communication technology application is a must and a breakthrough solution to further attract visitors, heighten competitiveness and international integration, and contribute to realize the goal of developing tourism into a key economic sector.

› Decision 1783/QĐ-BVHTTDL dated 17 May 2019 of the Minister of Culture, Sports and Tourism releasing the action plan for the Master Plan on information and communication technology application in the tourism sector. The plan includes specific tasks and actions to implement the Prime Minister's master plan, emphasizing the cooperation in data exchange between among the tourism sector at all the levels and between the Ministry and other relevant ministries and organizations.

ACTIONS

Vietnam National Administration of Tourism together with other relevant organizations has carried out a spate of actions in implementing the Master Plan on information and communication technology application and smart tourism development. The active involvement of localities, tourism enterprises, relevant sectors and VNAT's coordination role have brought about positive outcomes: the efficiency of tourism management and promotion has been improved and a wave of start-ups has risen in the tourism sector.

Training workshop held by VNAT on technology application for tourism development (November 2019)

Building tourism databases and developing applications for management activities

- Building digital tourism databases, including the data of tour guides, travel businesses, accommodations and tourist sites. The databases connect infor-mation from businesses, local authorities to central management bodies, aiming at placing a digital data platform for tourism management, promotion and business activities in tourism sector.
- Building and launching the application "Vietnam Tour Guiding" which would support work of tour guides, travel agencies and tourism management authorities. The application provides connection between tour guides, visitors and travel agencies throughout the travel itineraries; allows assessment and rating of tour guides and travel agencies; and provides helpful information about products, services and facilitate e-payment.
- Building the Dashboard of Vietnam tourism to support tourism management.
- Many localities built plans to implement the Master Plan on information and communication technology application in the tourism sector for the period 2018-2020 with direction to 2025.

The interface of Vietnam tourism digital database website

Development of digital technology applications supporting tourists and promoting smart tourism

- Upgrading Viet Nam's tourism promotional website vietnam.travel. Pushing tourism promo tional campaigns via VNAT's social networks such as Facebook, Instagram, Youtube.
- Cooperating with Vietnam e-Commerce and Digital Economy Agency - iDEA (Ministry of In dustry and Trade) to integrate tourism into "One National Card" Program which allows visitors to use tourist services in Viet Nam and make payment conveniently, based on shared databases of tourism, trade, healthcare, education sectors and trade banks. Developing and launching application "Vietnam Tourism" to support tourists.
- Organizing FAM/Press trips for Vietnamese and international journalists, reporters and tourism enterprises to Viet Nam's famous destinations, aiming at developing digital contents for promotion of Vietnam tourism.

Launching Ceremony of Vietnam Tourism Card

The interface of Vietnam tourism's Youtube channel

Supporting smart tourism start-up businesses

- VNAT, for the first time, organized the contest "Vietnam Smart Tourism Start-ups" (VSTS). The contest lasted from March to June 2019, drawing the involvement of many young innovative start-ups with creative ideas and advanced technologies.
- Participating the contest "Mekong Innovative Startups in Tourism" (MIST) in October 2019.
- Organizing communication activities and training programs on information technology for tourism state-managementofficials and tourism enterprises.

Announcement ceremony of the contest "Vietnam Smart Tourism Start-ups" (March 2019)

Some noticeable activities

- Ho Chi Minh City held International Conference on Smart Tourism in September 2019 in framework of ITE HCMC 2019.
- Thua Thien Hue Province organized Hue Tourism Forum 2019 under the theme of "Developing Smart and Sustainable Tourism in Thua Thien Hue" in September 2019.
- Ha Noi City developed smart tourism system as a part of Ha Noi's smart city. The system provides smart solutions to facilitate activities of tourists, improve efficiency of state management bodies and create more opportunities for business community.
- Quang Ninh Province opened the Smart City Operating Center; studied to develop a smart tourism operating center.
- Da Lat City (Lam Dong Province) also launched the Smart City Operating Center which connects with Da Lat tourism information portal (http://dalat.vn) and smart tourism application (Da Lat City) to provide information and smart utilities to visitors.

Minister of Culture, Sports and Tourism Nguyen Ngoc Thien attended ASEAN Tourism Forum 2019 held in Ha Long City, Quang Ninh Province (Jan 2019)

7

INTERNATIONAL COOPERATION

Viet Nam confirmed its increasing role and position in the world. Taking those advantages, Vietnam tourism focused international tourism cooperation on strengthening tourism promotion to attract tourists to Viet Nam from target markets.

FOSTERING MULTILATERAL COOPERATION, HEIGHTENING THE POSITION OF VIETNAM TOURISM

In 2019, Vietnam tourism took advantage of multilateral cooperation mechanisms to lure more resources for the sector and popularize the image of Vietnam tourism to the world.

In ASEAN cooperation framework

Viet Nam successfully hosted the ASEAN Tourism Forum (ATF) 2019 in Ha Long City, Quang Ninh Province in January 2019, with the theme "ASEAN - The Power of One". The Forum attracted the attendance of more than 2,000 delegates. The important events of ATF 2019 including the opening ceremony, the closing ceremony, ASEAN Ministerial Meetings, ASEAN NTOs Meetings, ASEAN Tourism Conference... were successfully held, making strong positive impression on the international delegates. The success of ATF 2019 played a vital role in reinforcing tourism cooperation in ASEAN, confirming and raising the position of Vietnam tourism in the region and worldwide.

Viet Nam took lead in the task of "Developing and carrying out ASEAN Strategy on participation of local communities and private sectors in tourism development" and "ASEAN tour program on traditional festivals"; coordinated with ASEAN - Korea Center (AKC) to organize cultural exchange activities and introduce Vietnam tourism at ASEAN – Korea Week (July 2019); held "ASEAN community-based tourism program 2019" at Mai Chau (Hoa Binh Province) in December 2019.

In Greater Mekong Subregion (GMS) cooperation framework

Viet Nam participated in the 43rd Meeting of the GMS Tourism Working Group and GMS Tourism Forum 2019 in China (May 2019); successfully hosted the 6th Meeting of Southern Tourism Corridor in Can Tho City (August 2019).

Viet Nam actively coordinated with Mekong Tourism Coordination Office (MTCO) and regional countries to carry out initiatives on tourism promotional campaigns: Mekong Moments, Mekong Showcases, Mekong Innovative Startups in Tourism (MIST), Mekong Mini Movie Campaign (Mekong Minis).

The Asian Development Bank supported Viet Nam to continue the implementation of GMS Tourism Infrastructure for Inclusive Growth Project (period 2014-2019 and 2019-2024).

Deputy Minister Culture, Sports and Tourism Le Quang Tung participated the 5th CLMV Ministerial Meeting in Thailand (June 2019)

In ACMECS, CLMV, CLV cooperation framework

Viet Nam actively contributed to the success of the 4th Meeting of ACMECS Tourism Ministers and the 5th Meeting of CLMV Tourism Ministers in Thailand (June 2019); and joined the other countries to carry out the ACMECS's Master Plan 2019-2023 and CLMV's Master Plan 2019-2021.

Viet Nam took the lead in building tourism cooperation plan for the Cambodia -Laos - Viet Nam Development Triangle area, submited for approval at the coming CLV Summit.

Other cooperation framework

Viet Nam also actively participated in other cooperation mechanisms including G20, APEC, UNWTO, PATA. The Leaders of Ministry of Culture, Sports and Tourism participated in the G20 Tourism Ministerial Conference in Japan and delivered speech at Tourism Expo Japan's Ministerial Round Table under the theme of "Community Vitalization: People and Culture".

Through multilateral cooperation mechanisms, Viet Nam affirmed its role as a responsible and active partner in Asia, contributing to enhancing the relationships among Asian nations, pushing tourism development in the region and raising position of Vietnam tourism in the world.

STRENGTHENING BILATERAL TOURISM COOPERATION, CONTRIBUTING TO DRAWING VISITORS FROM KEY SOURCE MARKETS

Minister of Culture, Sports and Tourism Nguyen Ngoc Thien attended the opening ceremony of Vietnam Tourism Promotion Office in South Korea (June 2019)

The bilateral cooperation in 2019 concentrated in the key source markets in Northeast Asia and Southeast Asia, in order to accelerate visitors exchange and mobilize resources for Vietnam tourism development.

With China: Carrying out the Plan on Implementing Agreement on Cooperation for the Protection and Use of Tourism Resources in Ban Gioc Waterfall Tourism Area (Viet Nam) - Duc Thien (China); organizing Vietnam tourism promotional events in China; supporting China's Sichuan Province and Hangzhou City to hold tourism roadshows in Viet Nam.

With South Korea: Taking part in the High-level Policy Forum, KOPIST (Korea Partnership Initiative on Sustainable Tourism) in South Korea.

With Japan: Supporting Japan National Tourism Organization's Office in Viet Nam to organize Japan tourism roadshows in Viet Nam; participating Tourism Investment Promotion Workshop (October 2019) and Cuisine Tourism Workshop in Japan (November 2019).

With Taiwan: Organizing the 8th Viet Nam – Taiwan Tourism Cooperation Meeting in Vung Tau City and awarding leading tourism enterprises of Viet Nam and Taiwan; introducing Vietnam tourism in Taipei; and exchanging tourism activities and art performances.

With Southeast Asian countries: Welcoming Thailand and Singapore's FAM/Press trips to explore and promote tourist products of Viet Nam; proposing tourism cooperation contents between Viet Nam and Thailand in framework of ASEAN Tourism Master Plan.

With India: Introducing Vietnam tourism in Vietnam Culture Week in India (November 2019); supporting India's Tourism Ministry and the Indian Embassy in Viet Nam to organize the Indian tourism roadshow in Ha Noi (August 2019).

Besides, Viet Nam regularly met and shared information with foreign delegations from Colombia, Bangladesh, France, Germany, Chile, Macau, Hong Kong... visiting Viet Nam to learn about experiences and opportunities for business and investment cooperation.

Minister Nguyen Ngoc Thien co-chaired the 18th Meeting of ASEAN+3 Tourism Ministers held in Ha Long, Quang Ninh (January 2019)

Viet Nam signed 6 new international cooperation agreements

In 2019, Viet Nam continued to implement signed tourism cooperation documents and signed 6 new international cooperation agreements, including:

- Tourism Cooperation Agreement between Viet Nam's Ministry of Culture, Sports and Tourism and Armenia's Ministry of Economy (October 2019)
- Tourism Cooperation Agreement between Vietnam National Administration of Tourism and North Korea's Tourism Administration (July 2019)
- Memorandum of Understanding on Tourism Cooperation between Vietnam National Administration of Tourism and Shandong's Culture and Tourism Department (China) (July 2019)
- Memorandum of Understanding on Tourism Cooperation between Viet Nam's Ministry of Culture, Sports and Tourism and the Russia Federation's Federal Agency for Tourism (May 2019)
- Memorandum of Understanding on Tourism Cooperation between Vietnam National Administration of Tourism and Sichuan's Department of Culture and Tourism (China) (May 2019)
- Memorandum of Understanding on Tourism-Cooperation between Vietnam National Administration of Tourism and Chongqing's Culture and Tourism Development Committee (China) (May 2019)

Scenery of Hoi An Ancient Town, Quang Nam

8

VIETNAM TOURISM 2020:
SWOT ANALYSIS AND PROSPECT

Viet Nam confirms its increasingly important role in the international arena. These are a solid platform for Vietnam tourism to attract more international visitors. However, the Covid-19 pandemic has been adversely impacting the global tourism in general and Vietnam tourism in particular, which requires great effort to overcome newly-posed challenges.

SWOT ANALYSIS

Threats

- The coronavirus disease (Covid-19) outbreak has spread worldwide. The World Health Organization (WHO) officially declared Covid-19 contagion a global pandemic. The disease has been seriously impacting all the socio-eco nomic activities in the world, of which tourism and aviation are most heavily hit.
  - From the late of March 2020, most of the global travel has been basically suspended. Most countries imposed travel restrictions, cancelled cultural festivals and entertainment activities, and closed tourist attractions.
  - The Vietnamese government decided to suspend entry to all foreigners since 22 March and all the international passenger air routes since 01 April.
  - The demand and behaviors of visitors have changed due to the impact of Covid-19, which requires adaptive actions from destinations and enterprises.
- Globally, there are still potential risks that could badly impact the world economy, including US - China trade tension; political and trade conflicts in Northeast Asia; uncertainties and challenges on the Korean Peninsula; the rise of protectionism; clashes in the Middle East...
- Climate change and unexpected weather developments like tropical hurricanes, floods, sea-water level rising... have posed big problems to Viet Nam, severely deteriorating tourism infrastructure, resources and buildings, especially in the Mekong River Delta. Specifically, drought and salinity intrusion in the Mekong River Delta have been heavily damaging the agriculture sector and threating millions of livelihoods in the region.

Opportunities

- The crisis caused by the Covid-19 pandemic has forced requirements and also brought opportunities for accelerating digital technology application in management affairs and business transactions in the tourism sector. Online activities have become more popular to maintain essential activities of the society and reduce the risk of SARS-CoV-2 infection.
- The Covid-19 pandemic is a chance for the tourism sector to re-structure its operation following a more flexible and sustainable manner, reinforce organization, improve labor skills, re-target source markets and enhance cooperation.
- A new global trading order has been in the process of formation. The UK has officially left European Union (EU) since 31 January 2020, opening a new roadmap for both the UK and EU.
- ASEAN has been pushing closer cooperation by simplifying visa requirements, promoting trade, investment and cultural exchange activities.

Strengths

- Viet Nam confirms the important role in the international arena with the positions of the 2020 ASEAN Chairmanship, Non-Permanent Member of the United Nations Security Council for the 2020-2021 tenure and remarkable achievements in the course of the socio-economic development recognized by the global community... These are a solid platform for Vietnam tourism to enhance the appealing image to a wider range of international markets.
- Vietnam tourism has received greater attention and support from the Party, the Government and the Prime Minister, the Ministry of Culture, Sports and Tourism, and the close collaboration of relevant ministries, sectors, localities and the whole society.
- Air connections between Viet Nam and source markets were expanded, more foreign airlines were interested in joining Viet Nam's emerging air transport market.
- Technical infrastructure for tourism has been upgraded. Many high class hotels, resorts and entertainment and recreation complexes have been put into operation by such big business groups as Sun Group, Vingroup, FLC, BIM, BRG...
- In 2019, Vietnam tourism was honored by reputable international organizations with global and regional awards. Viet Nam is emerging as an attractive and safe destination, while there are still uncertainties in some other areas in the region and the world.

- Viet Nam is a safe and stable country. Viet Nam has been highly appreciated for the success of controlling the Covid-19 pandemic by implementing definitive, solid and effective solutions by the World Health Organization and international community.

Weaknesses

- Most of Viet Nam's tourism enterprises are of small and medium scales with limited resources severely impacted by the Covid-19 pandemic. Many tourism enterprises have been forced to reduce or even stop their operation, which will then affect the competitiveness of Vietnam tourism.
- The important indicators of Vietnam tourism ranking low in the WEF's competitiveness table include: tourist service infrastructure, health and hygiene, ground and port infrastructure, environmental sustainability. These weaknesses could constrain the growth and sustainable development of Vietnam tourism.
- Some airports, especially Tan Son Nhat in Ho Chi Minh City, are facing overcapacity. This situation is considered a bottle-neck that needs to be tackled to facilitate air travel. Besides, Viet Nam is lacking seaports specialized for receiving tourism cruise ships.
- Resources, mechanisms and policies for national tourism promotion are still limited, which is a major weakness of Vietnam tourism if compared to the other competing destinations in the region.
- There has been a shortage of tourism work force, both in number and quality, especially high quality staff, which could prevent the tourism sector from improving service quality. It costs tourism enterprises more in terms of time and financial resource for re-training to meet the market requirements.

2020 PROSPECT

World

- The World Tourism Organization (UNWTO) forecasted 3 scenarios of global tourism in 2020, based on possible dates of lifting of travel restrictions and gradual re-opening of international borders. Accordingly, (1) In early July: -58% in international arrivals in 2020; (2) In early September: -70%; (3) In early December: -78%.
- Under these scenarios, the drop in international demand would translate into a loss of 850 million to 1.1 billion international tourists; US$ 910 billion to US$ 1.2 trillion in export revenues from tourism; and 100 to 120 million direct tourism jobs.

Viet Nam

- The recovery of the tourism sector in Viet Nam might follow 4 stages: (1) Focusing on recovery of domestic tourism; (2) Pilot reception of limited international tourist groups in some certain tourist sites following Covid-19 prevention measures when allowed; (3) Reception of visitors from countries/territories under good control of Covid-19; (4) Full recovery ofinternational tourism.
- For inbound tourism: In case of re-opening in early December, Viet Nam would receive 4-4.5 million international arrivals in 2020.
- For domestic tourism: Thanks to the successful containment of Covid-19, Viet Nam restarted domestic tourism since the beginning of May 2020, but was re-struck by the 2nd wave of Covid-19 from the end of July. If Covid-19 can be well controlled, the domestic market may rebound from the 4th quarter of 2020.

International visitors taking a tour at Temple of Literature (Ha Noi)

VNAT's Chairman Nguyen Trung Khanh received VIetnam tourism's awards at the World Travel Awards 2019

TOURISM AWARDS 2019

Thanks to unceasing efforts to raise quality and images, in 2019, Vietnam tourism was honored with outstanding awards granted by global reputable organizations, which strongly confirmed its strong brand in the region and the world.

INTERNATIONAL AWARDS 2019

World Travel Awards

Country

- World's Leading Heritage Destination: Viet Nam
- World's and Asia's Best Golf Destination: Viet Nam
- Asia's Leading Destination: Viet Nam
- Asia's Leading Cultural Destination: Viet Nam
- Asia's Leading Culinary Destination: Viet Nam

Complex of Hue Monuments - the UNESCO World Cultural Heritage

Hotels, resorts

- FLC Halong Bay Golf Club & Luxury Resort (World's Leading Conference & Wedding Hotel, Asia's Leading Conference Hotel)
- Hotel de la Coupole MGallery by Sofitel (World's and Asia's Leading Design Hotel, World's Leading Iconic Hotel, Asia's Leading New Hotel)
- InterContinental Danang Sun Peninsula Resort (World's Leading Luxury Beach Resort, World's Leading Resort Architecture Design, Asia's Leading Luxury Resort, Asia's Leading Green Resort, Asia's Leading Luxury Wedding Resort)
- InterContinental Phu Quoc Long Beach Resort (World's and Asia's Leading MICE Resort, Asia's Leading Luxury Family Resort)
- JW Marriott Phu Quoc Emerald Bay (World's Leading Resort & Spa, World's Leading Luxury Wedding Resort, Asia's Leading Luxury Resort & Spa)
- Mercure Danang French Village Bana Hills (World's Leading Themed Resort)
- Premier Village Danang Resort Managed by AccorHotels (World's Leading Family Villa Resort)
- Premier Village Phu Quoc Resort (World's Leading Beach Villa Resort, Asia's Leading Villa Resort)
- Vinpearl Luxury Landmark 81(World's and Asia's Leading Riverfront Hotel)
- An Lam Saigon River (Asia's Leading Lifestyle Resort)
- Anantara Quy Nhon Villas (Asia's Leading New Resort)
- Naman Retreat (Asia's Leading Retreat)
- Salinda Resort Phu Quoc Island (Asia's Leading Boutique Beach Resort)

- Silk Sense Hoi An River Resort (Asia's Leading Boutique Resort)
- Six Senses Ninh Van Bay (Asia's Most Romantic Resort)
- The Grand Ho Tram Strip (Asia's Leading Resort)
- VinOasis Phu Quoc (Asia's Leading Fully Integrated Family Resort)
- Vinpearl Discovery 2 Phu Quoc (Asia's Leading New Villa Resort)
- Vinpearl Resort & Spa Phu Quoc (Asia's Leading Family & Beach Resort)

Restaurants, tourist services and attractions

- Cable Car at Sun World Ba Na Hills (World's Leading Cable Car Ride)
- Sun World Fansipan Legend (World's Leading Cultural Tourist Attraction)
- Harnn Heritage Spa (World's and Asia's Best Resort Spa)
- Els Performance Golf Academy (World's Best Par 3 Golf Course)
- La Maison 1888 @ InterContinental Danang Sun Peninsula Resort (World's and Asia's Leading Fine Dining Hotel Restaurant)
- Hoi An (Asia's Leading Cultural City Destination)
- Ha Long Bay (Asia's Leading Tourist Attraction)
- Cuc Phuong National Park: Asia's Leading National Park
- Ba Na Hills Golf Club (Asia's Best Golf Course)

Tour operators, aviation

- Vietravel (World's Leading Group Tour Operator, Asia's Leading Tour Operator)
- Vietnam Airlines (World's and Asia's Leading Airline - Premium Economy Class, World'sLeading Cultural Airline, Asia's Leading Airline Brand)
- Van Don International Airport (World's and Asia's Leading New Airport)

World Luxury Hotel Awards

Fraser Suites

- Fraser Suites Hanoi (Luxury Brand)
- Hotel De La Coupole, MGallery By Sofitel (Luxury Architecture Design Hotel)
- Indochine Palace (Luxury Hotel & Conference Centre)
- Movenpick Hotel Hanoi (Luxury Boutique Hotel)
- Sheraton Grand Danang Resort (Luxury Coastal Resort)
- Silk Sense Hoi An River Resort (Luxury Eco Resort & Luxury Banquet/Event Hotel)
- Sun Spa Resort (Luxury Spa Resort & Luxury Beachfront Villa)
- The Grand Ho Tram Strip (Luxury Coastal Hotel)

Asia Awards

- Green Bay Phu Quoc Resort & Spa (Luxury Eco Resort)
- InterContinental Nha Trang (Luxury Coastal Hotel)
- Melia Hanoi (Luxury City Hotel)
- Mercure Danang French Village Bana Hills (Luxury Honeymoon Hotel)
- Oakwood Residence Saigon (Luxury Serviced Apartment)
- Pan Pacific Hanoi (Luxury Business Hotel)
- Premier Village Phu Quoc Resort (Luxury Villa Resort)
- Radisson Blu Resort Phu Quoc (Luxury Island Resort)
- Seashells Phu Quoc Hotel & Spa (Luxury New Hotel)
- Swandor Hotels & Resorts Cam Ranh (Luxury Family All-Inclusive Hotel)
- Vinpearl Luxury Landmark 81 (Luxury Hotel & Conference Centre)

ASEAN Tourism Awards

ASEAN Green Hotel Awards

- JW Marriot (Ha Noi City)

  - Victoria (Can Tho City)

  - Novotel Ha Long Bay (Quang Ninh Province)

  - Terracotta Resort & Golf Dalat (Lam Dong Province)

  - Four Seasons The Nam Hai (Hoi An City)

ASEAN Clean Tourist Awards

- Hue City (Thua Thien Hue Province)

  - Vung Tau City (Ba Ria - Vung Tau Province)

  - Quy Nhon City (Binh Dinh Province)

ASEAN Sustainable Tourism Awards

- Best sustainable rural tourism products: Thanh Dong Organic Vegetable Garden (Quang Nam Province)

  - Best sustainable urban tourism products: Sa Vi border information popularisation complex (Quang Ninh Province)

ASEAN MICE Venue Awards

- Furama Resort (Da Nang City)

  - Van Phat Riverside (Can Tho City)

  - Muong Thanh Luxury (Quang Ninh Province)

  - Diamond Bay (Khanh Hoa Province)

  - Novotel Phu Quoc (Kien Giang Province)

Some notable awards honored by international websites, magazines

Hoi An was named the best City in the World and in Asia by Travel & Leisure.

- Ha Noi was listed in Top 25 global destinations by Tripadvisor.

- Ha Noi, Hoi An, Da Nang, Ho Chi Minh City were listed in Top 25 destinations in Asia by Tripadvisor.

- Ha Noi with local food scenes was listed in the world's 25 best experiences by Tripadvisor.

VIETNAM TOURISM AWARDS

Leading inbound tour operators

1. Saigontourist (HCM City)
2. ANEX Viet Nam (Khanh Hoa Province)
3. Pegas Misr Viet Nam (Khanh Hoa Province)
4. HIS Song Han Viet Nam (Da Nang City)
5. Ben Thanh Tourist (HCM City)
6. Kim Lien Travel (Ha Noi City)
7. Vietravel (HCM City)
8. Exotissimo Viet Nam (HCM City)
9. JBT-TNT (HCM City)
10. APEX Viet Nam (HCM City)

The Ceremony of Vietnam Tourism Awards 2019

Leading outbound tour operators

1. Saigontourist (HCM City)
2. Viet Media Travel (HCM City)
3. TransViet Travel (HCM City)
4. Vietrantour (Ha Noi City)
5. Ben Thanh Tourist (HCM City)
6. Hanoitourism (Ha Noi City)
7. Hanoi Redtours (Ha Noi City)
8. Cholontourist (HCM City)
9. Hanoitourist (Ha Noi City)
10. Hanotours (Ha Noi City)

Leading domestic tour operators

1. Vietravel (HCM City)
2. Saigontourist (HCM City)
3. Ben Thanh Tourist (HCM City)
4. VITOURS (Da Nang City)
5. Dat Viet Tour (HCM City)
6. Vietrantour (Hanoi)
7. VietSense (Ha Noi City)
8. Peace Tour (HCM City)
9. Hanoitourist (Ha Noi City)
10. Cholontourist (HCM City)

Leading five-star hotels

1. Intercontinental Da Nang Sun Penisula Resort (Da Nang City)
2. Metropole (Ha Noi City)
3. JW Marriott (Ha Noi City)
4. Four Seasons The Nam Hai (Quang Nam Province)
5. Rex Hotel (HCM City)
6. Laguna Lang Co (Thua Thien Hue Province)
7. Vinpearl Resort & Spa Halong (Quang Ninh Province)
8. Dalat Palace (Lam Dong Province)
9. InterContinental Nha Trang (Khanh Hoa Province)
10. Grand Hotel (HCM City)

Leading four-star hotels

1. Saigon Ha Long (Quang Ninh Province)
2. Fortuna Ha Noi (Ha Noi City)
3. Hoi An Beach Resort (Quang Nam Province)
4. Novotel Nha Trang (Khanh Hoa Province)
5. Isena (Khanh Hoa Province)
6. Bamboo Village Beach Resort & Spa (Binh Thuan Province)
7. La Sapinette Dalat (Lam Dong Province)
8. Park Royal Saigon (HCM City)
9. Hotel Continental Saigon (HCM City)
10. TTC Can Tho (Can Tho City)

Leading tourist waterway carriers

1. Paradise Vietnam (Quang Ninh Province)
2. Era Cruise (Hai Phong City)
3. Bhaya Cruise (Quang Ninh Province)
4. Oriental Sails (Ha Noi City)
5. Emperor Cruises (Ha Noi City)

Leading tourist automobile carriers

1. Saigontourist (HCM City)
2. Peace Tour (HCM City)
3. Long Hien (Da Nang City)
4. Inter Bus Lines (Ha Noi City)
5. Minh Viet (Ha Noi City)

Top tourist carrying airline

Vietnam Airlines

Fastest growing tourism airline

Vietjet Air

The Ceremony of Vietnam Tourism Awards 2019

Deputy Prime Minister Vu Duc Dam and awarded organizations at Vietnam Tourism Awards 2019

Leading restaurants

1. Ha Long Fishing Village Restaurant (Quang Ninh Province)
2. Binh Quoi Tourist Village (HCM City)
3. Hai Dang Plaza Restaurant (Hai Phong City)
4. Thai Hai Reserve Area of Ecological Houses-on-stilts Village (Thai Nguyen Province)
5. Coco A Restaurant (Ha Noi City)

Leading tourism and entertainment destinations

1. Sun World Halong Park (Quang Ninh Province)
2. Sun World Ba Na Hills (Da Nang City)
3. Vinpearl Land Phu Quoc (Kien Giang Province)
4. Dam Sen Cultural Park (HCM City)
5. Bao Son Paradise Park (Ha Noi City)

Leading reststops for tourists

1. AStop (Phu Yen Province)
2. V52 Reststop (Hai Duong Province)
3. Mekong Reststop (Tien Giang Province)

Leading tourism investment groups

1. Vinpearl Group
2. Sun Group
3. FLC Group
4. BRG Group
5. Saigontourist Holding Company

Leading golf courses

1. BRG Kings Island Golf Resort (Ha Noi City)
2. Sky Lake Resort & Golf Club (Ha Noi City)
3. Long Bien Golf Club (Ha Noi City)
4. Laguna Lang Co Golf Club (Thua Thien Hue Province)
5. Ba Na Hills Golf Club (Da Nang City)
6. BRG Da Nang Golf Resort (Da Nang City)
7. Montgomerie Links (Quang Nam Province)
8. FLC Quy Nhon Golf Link (Binh Dinh Province)
9. Twin Doves Golf Club (Binh Duong Province)
10. The Bluffs Ho Tram Strip (Ba Ria - Vung Tau Province)

Tourism training establishments

1. Ha Noi Open University (Ha Noi City)
2. Hoa Sen University (HCM City)
3. Saigontourist Hospitality College (HCM City)
4. Ha Noi Tourism College (Ha Noi City)
5. Hue Tourism College (Thua Thien Hue Province)

Media agencies for Vietnam tourism

1. Culture Division, News Department (Viet Nam Television-VTV)
2. Vietnamjourney (Voice of Viet Nam - VOV)
3. Van Hoa Newspaper (Ministry of Culture, Sports and Tourism)
4. VnExpress (Ministry of Science and Technology)
5. VietnamPlus (Vietnam News Agency)

The Ceremony of Vietnam Tourism Awards 2019

APPENDIX

1. International visitors to Viet Nam in 2019, by markets

No.	Markets	International visitors *(arrivals)*	Growth 19/18 *(%)*
	Total	**18,008,591**	**16.2**
1	China	5,806,425	16.9
2	South Korea	4,290,802	23.1
3	Japan	951,962	15.2
4	Taiwan	926,744	29.8
5	USA	746,171	8.6
6	Russia	646,524	6.6
7	Malaysia	606,206	12.2
8	Thailand	509,802	45.9
9	Australia	383,511	-0.9
10	UK	315,084	5.7
11	Singapore	308,969	7.9
12	France	287,655	2.9
13	Cambodia	227,910	12.3
14	Germany	226,792	6.0
15	Philippines	179,190	18.2
16	India	168,998	27.7
17	Canada	159,121	6.4
18	Indonesia	106,688	21.3
19	Laos	98,492	-17.9
20	Spain	83,597	8.5
21	Holland	81,092	4.9
22	Italy	70,798	8.0
23	Sweden	50,704	2.0
24	New Zealand	47,088	-5.5
25	Denmark	42,043	5.3
26	Hong Kong	36,802	-40.8
27	Switzerland	36,577	5.9
28	Belgium	34,187	8.9
29	Norway	28,037	7.3
30	Finland	21,480	-5.7
31	Others	529,140	11.2

Source: GSO

2. International visitors to some cities/provinces in 2019

No.	Cities/Provinces	International visitors *(arrivals)*
1	Ho Chi Minh City	8,619,000
2	Ha Noi	7,025,000
3	Quang Ninh	5,700,000
4	Quang Nam	4,600,000
5	Da Nang	3,497,561
6	Khanh Hoa	3,560,175
7	Thua Thien Hue	2,186,747
8	Ninh Binh	970,000
9	Hai Phong	930,000
10	Lao Cai	806,106
11	Binh Thuan	775,000
12	Kien Giang	713,291
13	Lam Dong	533,000
14	Ba Ria - Vung Tau (*)	500,000
15	Binh Dinh	484,000
16	Can Tho (*)	409,023
17	Quang Binh	300,000
18	Ha Giang	225,131
19	Dien Bien	183,000
20	Quang Tri	176,000
21	Nghe An	145,000
22	An Giang	145,000

Source: compiled from local reports

(*) visitors spending overnights at tourist accommodations

3. International visitors to Viet Nam by month, 2018-2019

Months	2018 *(arrivals)*	2019 *(arrivals)*	Growth 19/18 (%)
January	1,430,242	1,501,766	5.0
February	1,431,845	1,588,161	10.9
March	1,343,314	1,410,187	5.0
April	1,341,913	1,468,766	9.5
May	1,161,114	1,326,668	14.3
June	1,183,102	1,185,445	0.2
July	1,188,817	1,315,792	10.7
August	1,323,546	1,512,447	14.3
September	1,212,597	1,561,274	28.8
October	1,205,157	1,618,337	34.3
November	1,301,909	1,810,583	39.1
December	1,374,235	1,709,165	24.4
Total	**15,497,791**	**18,008,591**	**16.2**

Source: GSO

4. Number of accommodations classified 4-5 star in 2019, by cities/provinces

No.	Cities/provinces	4 star		5 star		Total	
		Acc.	Rooms	Acc.	Rooms	Acc.	Rooms
1	Binh Duong	2	245			2	245
2	Binh Thuan	2	176			2	176
3	Can Tho	2	213			2	213
4	Da Nang	5	613	2	557	7	1,170
5	Ha Giang	1	139			1	139
6	Ha Nam			1	120	1	120
7	Ha Noi	1	112	1	185	2	297
8	Ha Tinh	1	140			1	140
9	Hai Phong			1	233	1	233
10	Kien Giang			2	1,245	2	1,245
11	Khanh Hoa	4	787	3	1,345	7	2,132
12	Lang Son			1	127	1	127
13	Lao Cai	2	196			2	196
14	Lam Dong	2	315			2	315
15	Phu Yen			1	180	1	180
16	Quang Binh	1	124	2	280	3	404
17	Quang Nam	1	150			1	150
18	Quang Ninh	2	276	4	1,326	6	1,602
19	Tay Ninh			1	127	1	127
20	HCM City			2	583	2	583
21	Thanh Hoa			1	295	1	295
22	Thua Thien Hue			1	139	1	139
	Total	**26**	**3,486**	**23**	**6,816**	**49**	**10,302**

Acc.: Accommodations
Source: VNAT

Scenery of Ban Gioc Waterfall (Cao Bang province)

5. List of accommodations classified 4-5 star in 2019

No.	Accommodations	Rooms	Cities/provinces
	5 star		
1	DLG Da Nang	237	Da Nang
2	Hilton Da Nang	320	Da Nang
3	Vinpearl Phu Ly	120	Ha Nam
4	Somerset Grand Hanoi	185	Ha Noi
5	Mercure Hai Phong	233	Hai Phong
6	Best Western Premier Sonasea Phu Quoc	566	Kien Giang
7	Vinpearl Discovery 1 Phu Quoc	679	Kien Giang
8	Quinter Central	170	Khanh Hoa
9	Queen Ann	280	Khanh Hoa
10	Vinpearl Condotel BeachFront Nha Trang	895	Khanh Hoa
11	Vinpearl Lang Son	127	Lang Son
12	Rosa Alba	180	Phu Yen
13	Vinpearl Hotel Quang Binh	127	Quang Binh
14	Gold Coast Resort & Spa	153	Quang Binh
15	FLC Grand Hotel Ha Long	649	Quang Ninh
16	Hong Van Grand	325	Quang Ninh
17	Central Luxury Ha Long	219	Quang Ninh
18	Legacy Yen Tu	133	Quang Ninh
19	Vinpearl Hotel Tay Ninh	127	Tay Ninh
20	Vinpearl Luxury Landmark 81	233	HCM City
21	Holiday Inn & Suites Saigon Airport	350	HCM City
22	Vinpearl Thanh Hoa	295	Thanh Hoa
23	Vinpearl Hue	213	Thua Thien Hue
	4 star		
1	Phuong Nam Resort	76	Binh Duong
2	Becamex New City	169	Binh Duong
3	Ca Ty Mui Ne Resort	96	Binh Thuan
4	Lotus Mui Ne Resort & Spa	80	Binh Thuan
5	Holiday One	104	Can Tho
6	Ninh Kieu Riverside	109	Can Tho
7	Chicland	150	Da Nang
8	Paracel	165	Da Nang
9	Balcona Da Nang	126	Da Nang
10	Sala Da Nang Beach	90	Da Nang
11	The Code Hotel & Spa	82	Da Nang
12	Phoenix	139	Ha Giang
13	Wyndham Garden Hanoi	112	Ha Noi
14	Eagle	140	Ha Tinh

No.	Accommodations	Rooms	Cities/provinces
15	Libra	323	Khanh Hoa
16	Nagar Nha Trang	171	Khanh Hoa
17	Le More	158	Khanh Hoa
18	Daphovina	135	Khanh Hoa
19	Duc Huy Grand	87	Lao Cai
20	Bamboo Sa Pa	109	Lao Cai
21	Golf Valley	165	Lam Dong
22	Colline	150	Lam Dong
23	Tan Binh	124	Quang Binh
24	Phu Thinh Boutique Resort & Spa	150	Quang Nam
25	Dragon Legend Ha Long	135	Quang Ninh
26	Marina	141	Quang Ninh
	Total	**10,302**	

6. Number of 4-5 star accommodations by 2019, by cities/provinces

No.	Cities/provinces	Accommodations					Rooms				
		5 star	5 star-tourist apartment	4 star	4 star tourist apartment	Total	5 star	5 star-tourist apartment	4 star	4 star tourist apartment	Total
1	An Giang			1		1			92		92
2	Ba Ria–Vung Tau	4		15		19	1,114		1884		2,998
3	Bac Lieu										
4	Bac Giang			1		1			195		195
5	Bac Kan										
6	Bac Ninh	3		1		4	543		86		629
7	Ben Tre			1		1			81		81
8	Binh Duong	1		2		3	186		245		431
9	Binh Dinh	1		6		7	515		706		1,221
10	Binh Phuoc										
11	Binh Thuan	3		27		30	335		2,598		2,933
12	Ca Mau			1		1			177		177
13	Cao Bang										
14	Can Tho	2		8		10	568		909		1,477
15	Da Nang	21	1	36		58	5,623	864	5,044		11,531
16	Dak Lak	1		2		3	231		276		507
17	Dak Nong										
18	Dien Bien										
19	Dong Nai	1		1		2	208		132		340
20	Dong Thap										
21	Gia Lai			1		1			117		117

No.	Cities/provinces	Accommodations					Rooms				
		5 star	5 star-tourist apartment	4 star	4 star tourist apartment	Total	5 star	5 star-tourist apartment	4 star	4 star tourist apartment	Total
22	Ha Giang			1		1			139		139
23	Ha Nam	2				2	311				311
24	Ha Noi	15	7	17	2	41	4,849	1,370	2,426	454	9,099
25	Ha Tinh	1		2		3	311		338		649
26	Hai Duong			1		1			181		181
27	Hai Phong	3		7	1	11	468		799	132	1,399
28	Hau Giang										
29	Hoa Binh										
30	Hung Yen										
31	Kien Giang	12		9		21	6,847		1,215		8,062
32	Kon Tum										
33	Khanh Hoa	25	3	27		55	9,317	2,635	4,653		16,605
34	Lai Chau										
35	Lang Son	2				2	251				251
36	Lao Cai	3		7		10	829		806		1,635
37	Lam Dong	3		14		17	385		1,855		2,240
38	Long An										
39	Nam Dinh										
40	Ninh Binh			3		3			430		430
41	Ninh Thuan			1		1			122		122
42	Nghe An	2		8		10	643		1,251		1,894
43	Phu Tho	1				1	199				199
44	Phu Yen	3		2		5	491		169		660
45	Quang Binh	3		6		9	573		796		1,369
46	Quang Nam	7		23		30	1,754		2,615		4,369
47	Quang Ninh	10		21	1	32	2,927		3,165	156	6,248
48	Quang Ngai			3		3			285		285
49	Quang Tri			2		2			273		273
50	Soc Trang										
51	Son La	1		1		2	167		171		338
52	Tay Ninh	1				1	127				127
53	Tien Giang										

No.	Cities/provinces	Accommodations					Rooms				
		5 star	5 star-tourist apartment	4 star	4 star tourist apartment	Total	5 star	5 star-tourist apartment	4 star	4 star tourist apartment	Total
54	HCM City	22	2	26		50	6,523	523	3501		10,547
55	Tuyen Quang			1		1			150		150
56	Thai Binh										
57	Thai Nguyen										
58	Thanh Hoa	3		5		8	5,768		829		6,597
59	Thua Thien Hue	6		12		18	1,266		1,392		2,658
60	Tra Vinh										
61	Vinh Long										
62	Vinh Phúc	2		1		3	648		167		815
63	Yen Bai										
	Total	**165**	**13**	**302**	**4**	**484**	**54,054**	**5,392**	**40,093**	**742**	**100,281**

Source: VNAT

7. Number of inbound and outbound tour operators by type of enterprise, 2015-2019

Types of enterprises	2015	2016	2017	2018	2019
State-owned	8	5	5	-	-
Joint stock	507	489	556	788	967
Limited liability	1,026	1,081	1,214	1,207	1,665
Private	8	10	11	7	7
Foreign invested	15	15	16	20	28
Total	**1,564**	**1,600**	**1,802**	**2,022**	**2,667**

Source: VNAT

8. Number of valid international tour guides by 2019, by languages used

(One tour guide may use more than one language)

No.	Languages used *(main languages used by tour guides)*	By 2019
	Total	**17,825**
1	English	9,386
2	French	1,389
3	German	397
4	Chinese	4,390
5	Japanese	664
6	Korean	402
7	Spanish	269
8	Russian	483
9	Thai	272
10	Other	173

Source: VNAT

9. Foreign invested projects into accommodations, food and beverage, arts, entertainment and recreation, 2019

Areas	2019						
	New projects		Capital increase		Capital contribution, buying shares		Total(million USD)
	No. of new projects	Registered capital (million USD)	No. of increasecapital projects	Increase capital (million USD)	No. of capital contribution, buying shares	Capital contribution (million USD)	
Accommodation, food & beverage	103	39.047	23	37.994	663	311.383	388.423
Arts, leisure and entertainment	6	8.273	1	2.652	24	50.512	61.437
Total	**109**	**47.320**	**24**	**40.646**	**687**	**361.895**	**449.860**

Source: Foreign Investment Agency - Ministry of Planning and Investment

10. List of National Tourist Areas by 2019

1	Tuyen Lam Lake National Tourist Area, Lam Dong Province
2	Sa Pa National Tourist Area, Lao Cai Province
3	Nui Sam National Tourist Area, An Giang Province
4	Tra Co National Tourist Area, Quang Ninh Province

11. Some tourism-related documents released in 2019

- Decision No. 44/QĐ-TTg dated 09 January 2019 of the Prime Minister approving Project "Fostering media and communication for tourism".
- Resolution No. 17/2019/NĐ-CP dated 01 February 2019 of the Government on amendment of some articles of Resolution No. 07/2019/NĐ-CP regulating process and procedure for pilot issuance of e-visa to foreign nationals entering Viet Nam.
- Resolution No. 45/2019/NĐ-CP dated 21 May 2019 of the Government regulating penalties for administrative violations in tourism sector.
- Decision No. 1783/QĐ-BVHTTDL dated 17 May 2019 of the Ministry of Culture, Sports and Tourism releasing Plan to implement "Master Project on information technology application in the tourism sector from 2018-2020, direction to 2025".
- Decision No. 3720/QĐ-BVHTTDL dated 28 October 2019 of the Ministry of Culture, Sports and Tourism releasing Regulations on management and operation of tourist apartments, tourist villas and condotels.
- Circular No. 13/2019/TT-BVHTTDL dated 25 November 2019 of the Ministry of Culture, Sports and Tourism on amendment of some articles of Circular No. 06/2017/TT-BVHTTDL dated 15 December 2017 regulating in details some articles of Tourism Law.

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