Sustainable Tourism Development in Viet Nam in the Context of Green Growth and International Integration

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ABSTRACT:
This paper analyses sustainable tourism development in Viet Nam in the context of green growth and international integration, using secondary data for 2015-2024. The study combines descriptive statistics, recovery indices relative to the 2019 pre-pandemic baseline, the DPSIR framework, and policy-institutional analysis. The results show that Viet Nam tourism experienced three distinct phases: rapid pre-pandemic expansion in 2015-2019, severe disruption during COVID-19 in 2020-2021, and uneven recovery after reopening in 2022-2024. International arrivals increased from 7.94 million in 2015 to 18.01 million in 2019, fell sharply during the pandemic, and recovered to approximately 17.58 million in 2024. Domestic tourism became the main recovery pillar, reaching 101.3 million trips in 2022 and 110 million trips in 2024, exceeding the pre-pandemic level. Total tourism receipts in 2024 reached about VND 840 trillion, approximately 11.3% higher than in 2019. However, estimated receipts per visitor trip have not fully recovered, indicating a risk of volume-led rather than value-led growth. The paper argues that the transition to sustainable tourism is not only an environmental imperative but also a competitiveness condition, as tourists, investors, and tourism supply chains increasingly emphasise low-carbon standards, destination governance, safety, local experience, and social responsibility. Policy recommendations focus on data institutions, destination governance, green finance, green standards, digital transformation, inter-regional linkage, and a stronger role for local communities.

Keywords: Sustainable tourism; green growth; Viet Nam; international integration; destination governance; digital transformation; domestic tourism.

1. Introduction

Tourism is a service sector capable of directly connecting global demand with local resources. For Viet Nam, tourism does not merely generate foreign-exchange earnings and employment; it also broadens markets for transport, accommodation, food services, cultural products, agriculture, handicrafts, the night-time economy, and creative services. At the same time, because tourism depends heavily on destination resources, environmental infrastructure, cultural attractiveness, and social experience, it can quickly shift from a growth engine to a source of pressure when development is driven mainly by visitor

volume.

During 2015-2019, Viet Nam tourism recorded rapid growth, particularly in international arrivals, domestic trips, and tourism receipts. The period 2020-2021 demonstrated the sector's high sensitivity to disease shocks, mobility restrictions, and supply-chain disruption. Since 2022, Viet Nam has reopened to international tourism and witnessed a fast recovery, but the recovery structure remains uneven: domestic tourism rebounded first, international tourism followed later, and value captured per visitor has not increased in line with market scale.

This new context requires a change in the development model. First, green growth has become a cross-cutting orientation in national development strategy, requiring service sectors, including tourism, to reduce emission intensity, use resources efficiently, protect ecosystems, and promote sustainable consumption. Second, international integration intensifies competition among destinations, not only in terms of prices or product volume but also in governance quality, safety, cultural authenticity, environmental responsibility, environmental, social and governance (ESG) standards, and the ability to connect with regional tourism value chains.

The research problem addressed in this paper is how Viet Nam tourism has recovered and developed over the last decade, which indicators reveal sustainable or unsustainable trends, and what policy adjustments are needed to shift from scale-based growth to value-based, green, and inclusive growth. The paper therefore does not only describe statistical trends; it also situates these trends within a sustainable-development framework to identify institutional, data, infrastructure, environmental, and community-linkage bottlenecks.

2. Theoretical Background and Literature Review

2.1. Sustainable Tourism and Green Growth

Sustainable tourism is understood as a development process that balances three pillars: economic efficiency, environmental protection, and social equity. This approach emphasises that tourism development cannot be assessed solely by visitor numbers, accommodation capacity, or short-term revenue. It must also be evaluated through the capacity to maintain resources, distribute benefits to local communities, improve job quality, sustain residents' satisfaction, preserve culture, and strengthen resilience to risk.

Green growth complements sustainable tourism by focusing on the transformation of the growth model: efficient resource use, reduction of greenhouse-gas emissions, development of green infrastructure, promotion of green consumption, improvement of productivity, and enhancement of economic resilience. In tourism, green growth can be operationalised through energy and water management in accommodation facilities, reduction of single-use plastics, low-carbon transport, green building standards, nature-based tourism with controlled carrying capacity, destination data systems, and green finance for tourism enterprises.

International studies show that a tourism model based excessively on increasing visitor numbers can lead to destination overcrowding, declining visitor experience, high emissions, resident-tourist conflict, and loss of cultural identity (Butler, 1980; Gössling et al., 2020). A key governance trend is therefore to move from "more tourists" to "better tourism": increasing value, lengthening stays, encouraging responsible expenditure, improving service quality, distributing visitors across space and time, and establishing mechanisms for resource conservation.

2.2. International Integration and Destination Competitiveness

International integration affects tourism through at least five channels: market expansion, air and infrastructure connectivity, visa facilitation, service standardisation according to international practices, and

participation in regional cooperation networks. For Viet Nam, source markets in Northeast Asia, Southeast Asia, Europe, North America, Australia, and India differ in scale, spending capacity, seasonality, and product expectations.

However, integration also increases competitive pressure. Within ASEAN, tourists can choose among Thailand, Malaysia, Indonesia, Singapore, Cambodia, Laos, and Viet Nam. Sustainable advantage is no longer based mainly on low prices or available natural resources, but on the capacity to design experiences, manage destinations, provide reliable data, build national branding, simplify procedures, ensure safety, and demonstrate verifiable sustainability commitments (Dwyer & Kim, 2003).

The COVID-19 pandemic also changed perceptions of tourism risk. Destinations with crisis-management capacity, transparent communication, rapid digital transformation, diversified markets, and a strong domestic tourism base tended to recover more effectively. This suggests that sustainable tourism is not limited to environmental protection; it also includes resilience across the tourism ecosystem.

2.3. Analytical Framework

The paper applies a three-layer analytical framework. The first layer is market-dynamics analysis using 2015-2024 data on international arrivals, domestic tourism, total receipts, and estimated receipts per visitor trip. The second layer is the DPSIR framework, which links development drivers with resource pressure, destination state, economic-social-environmental impacts, and policy responses. The third layer is institutional analysis, which examines the alignment among the Strategy for Viet Nam Tourism Development to 2030, the National Green Growth Strategy for 2021-2030, and the requirements of international integration.

3. Data and Research Methodology

3.1. Data Sources

The study uses secondary data, prioritising official and verifiable sources: the Viet Nam National Authority of Tourism (formerly the Viet Nam National Administration of Tourism), the General Statistics Office, the Ministry of Culture, Sports and Tourism, the Government Portal, the World Travel & Tourism Council, the World Bank, and peer-reviewed studies on sustainable tourism in Viet Nam. The main data series cover international arrivals, domestic tourist trips, and total tourism receipts for 2015-2024.

Data for 2015-2019 were cross-checked against the Viet Nam Tourism Annual Report 2019, which reported more than 18 million international arrivals, 85 million domestic tourist trips, and VND 755 trillion in tourism receipts in 2019. Data for 2020-2021 reflect the COVID-19 disruption. Data for 2022-2024 reflect reopening, recovery, and renewed acceleration; in 2024, Viet Nam received about 17.58 million international visitors, 110 million domestic tourist trips, and approximately VND 840 trillion in tourism receipts.

Because Viet Nam's tourism statistical system is still being improved toward a tourism satellite account approach, some indicators may differ across sources due to measurement methods, publication timing, and coverage. This paper therefore adopts a cautious approach: it states units clearly, uses rounded figures from official reports, and avoids over-interpreting indicators that have not yet been fully standardised.

3.2. Analytical Methods

First, descriptive statistics are used to identify ten-year trends in visitor flows and tourism receipts. Second, the recovery index is calculated as: Recovery index = Value in year t / Value in 2019 x 100. The year 2019 is selected as the baseline because it was the pre-pandemic peak and is widely used in global tourism recovery analysis. Third, estimated receipts per visitor trip are calculated by dividing total tourism receipts by the sum of international and domestic visitor trips. This indicator does not replace disaggregated spending analysis by visitor type, but it

provides an initial measure of value-based recovery.

Fourth, the DPSIR framework is used to interpret relationships among tourism growth, resource pressure, destination state, impacts, and policy responses. Fifth, policy analysis is applied to compare tourism-development objectives with green-growth objectives and international-integration requirements. This approach is appropriate for a policy-oriented research article in which quantitative results support arguments about development governance.

Table 1. Consolidated dataset on Viet Nam tourism, 2015-2024

Year	International arrivals (million)	Domestic tourists (million)	Total visitors (million)	Tourism receipts (VND trillion)	Receipts/visitor (VND million)	Receipts index 2019=100
2015	7.94	57.0	64.94	355.0	5.47	47.0
2016	10.01	62.0	72.01	417.0	5.79	55.2
2017	12.92	73.2	86.12	541.0	6.28	71.7
2018	15.50	80.0	95.50	620.0	6.49	82.1
2019	18.01	85.0	103.01	755.0	7.33	100.0
2020	3.84	56.0	59.84	312.0	5.21	41.3
2021	0.015	40.0	40.015	180.0	4.50	23.8
2022	3.66	101.3	104.96	495.0	4.72	65.6
2023	12.60	108.0	120.60	678.3	5.62	89.8
2024	17.58	110.0	127.58	840.0	6.58	111.3

Source: Compiled from VNAT/VNTA, GSO, the Ministry of Culture, Sports and Tourism, Viet Nam News/VNA, and related reports; author's calculations. Note: The 2021 international-arrival figure is corrected to approximately 14,900 visitors (0.015 million) according to VNAT; receipts per visitor are reported in VND million per visitor trip.

4. Results: Data Analysis for 2015-2024

4.1. 2015-2019: Rapid Growth and Emerging Sustainability Pressure

The period 2015-2019 was the strongest growth phase in the study series. International arrivals increased from 7.94 million in 2015 to 18.01 million in 2019, equivalent to an average annual growth rate of about 22.7%. Domestic tourist trips increased from 57 million to 85 million, equivalent to about 10.5% per year. Tourism receipts increased from VND 355 trillion to VND 755 trillion, equivalent to about 20.8% per year. This strong growth reflects improvements in aviation connectivity, destination promotion, accommodation investment, the expansion of the domestic middle class, and the ability to attract visitors from Asian markets.

Rapid growth also created governance challenges. Some coastal destinations, heritage cities, and mountain areas began to face seasonal overcrowding, dense accommodation development, pressure on solid waste, wastewater, transport, and landscape transformation. In a context where environmental data for tourism remain fragmented, the main risk is that policy may prioritise visitor-volume targets over carrying capacity, experience quality, and local value added.

In terms of market structure, Viet Nam's international arrivals have been highly

concentrated in Asia, especially Northeast Asia. Market concentration helps exploit proximity advantages, lower travel costs, and higher flight frequencies, but it also creates risk when source markets fluctuate due to disease, visa policy, economic slowdown, or changes in consumer behaviour. Market sustainability therefore requires diversification of source markets, higher-spending segments, and products that lengthen the average stay.

4.2. 2020-2021: COVID-19 Shock and Lessons on Resilience

COVID-19 generated an unprecedented shock for Viet Nam tourism. International arrivals fell from 18.01 million in 2019 to about 3.84 million in 2020 and to only around 14,900 in 2021. Domestic tourist trips declined from 85 million in 2019 to 56 million in 2020 and 40 million in 2021. Tourism receipts decreased from VND 755 trillion in 2019 to VND 312 trillion in 2020 and VND 180 trillion in 2021.

This decline demonstrates that tourism is highly sensitive to mobility and health-safety risks. Travel agencies, accommodation providers, transport operators, restaurants, and supporting services were affected along the entire chain. Many workers left the sector, causing labour shortages when the market reopened. The key policy lesson is that sustainable tourism must include resilience: contingency funds, risk insurance, digital transformation, market diversification, domestic tourism products, workforce retraining, and local supply-chain linkages.

This period also clarified the role of domestic tourism. When the international market was almost frozen, the domestic market became the foundation for maintaining part of the sector's activities. Although domestic receipts could not fully replace international spending, domestic tourism helped sustain market confidence, retain some employment, test new products, and create momentum for recovery after reopening.

4.3. 2022-2024: Fast Recovery but Uneven Quality

In 2022, Viet Nam reopened to international tourism and recorded 3.66 million international arrivals, 101.3 million domestic tourist trips, and VND 495 trillion in tourism receipts. Domestic tourism exceeded the 2019 level in the first year of reopening, indicating strong demand after a prolonged period of mobility restrictions. In 2023, international arrivals reached 12.6 million, domestic tourists reached about 108 million, and tourism receipts reached approximately VND 678.3 trillion. In 2024, international arrivals reached about 17.58 million, or 97.6% of the 2019 level; domestic tourist trips reached 110 million, or 129.4% of the 2019 level; and tourism receipts reached about VND 840 trillion, equivalent to 111.3% of the 2019 level.

From a recovery-index perspective, receipts recovered faster than international arrivals because the domestic market expanded strongly and service prices may have adjusted after the pandemic. However, estimated receipts per visitor trip in 2024 were about VND 6.58 million, still below the 2019 level of VND 7.33 million. The index for receipts per visitor trip in 2024 was approximately 89.8% of the 2019 baseline. This suggests that post-pandemic recovery has been driven mainly by visitor volume, while value-based growth, service quality, and average spending remain constrained.

From a sustainability perspective, volume-based recovery has two sides. On the one hand, it restores employment, revenue, and market confidence. On the other hand, without destination governance, pressure on resources, waste systems, transport, heritage, and residents' lives may return faster than infrastructure can adapt. Therefore, the 2025-2030 period needs to shift from "recovery" to "green restructuring", in which visitor-volume targets are complemented by indicators on spending, emissions, satisfaction, benefit distribution, and destination carrying capacity.

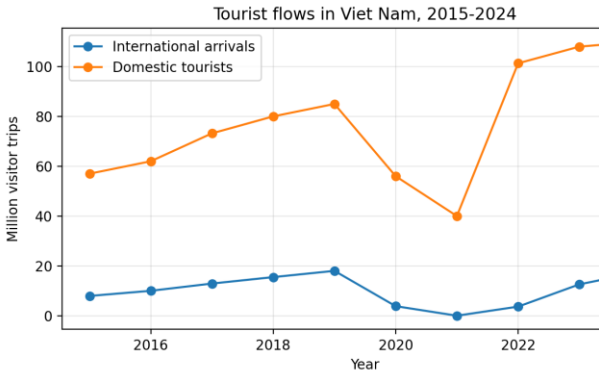

Figure 1. International arrivals and domestic tourist trips in Viet Nam, 2015-2024. Source: compiled and calculated by the author.

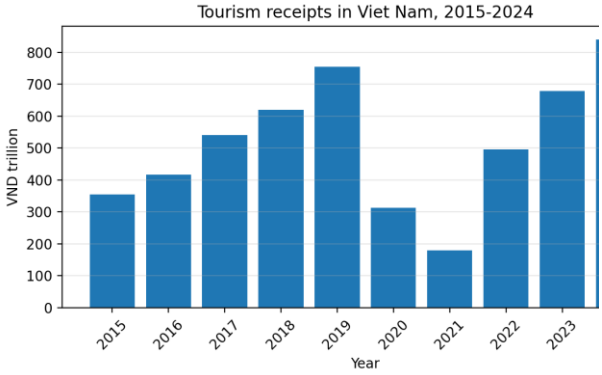

Figure 2. Tourism receipts in Viet Nam, 2015-2024. Source: compiled and calculated by the author.

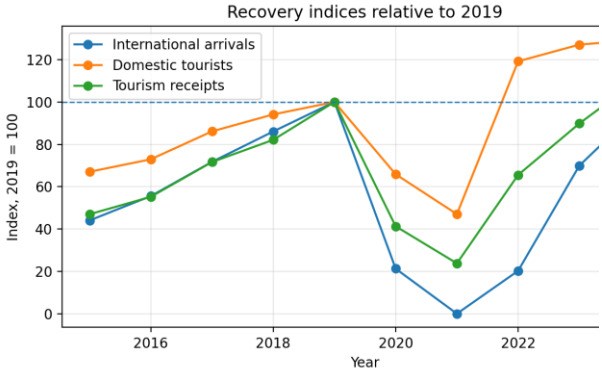

Figure 3. Recovery indices relative to 2019. Source: compiled and calculated by the author.

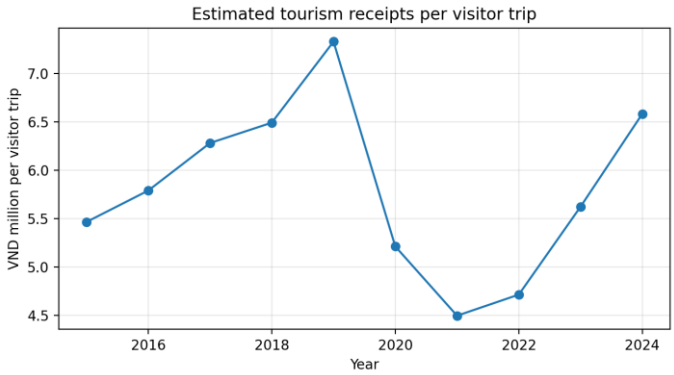

Figure 4. Estimated tourism receipts per visitor trip. Source: compiled and calculated by the author.

4.4. Assessment by the Three Pillars of Sustainability

Table 2. Sustainability trends in Viet Nam tourism, 2015-2024

Pillar	Positive outcomes	Remaining issues	Directions for improvement
Economic	Strong growth in visitor numbers and receipts; rapid recovery after reopening; tourism continues to generate spillover effects for transport, accommodation, food services, commerce, and culture.	Receipts per visitor have not fully recovered; dependence on a limited number of source markets; labour productivity and service quality remain uneven.	Shift from visitor-volume growth to value growth; develop longer-stay segments, MICE, wellness, high-value cultural tourism, agricultural tourism, and local-experience products.
Environmental	The national green-growth strategy provides a policy framework; many localities are paying more attention to green tourism, plastic reduction, and natural-heritage protection.	Lack of systematic data on emissions, water use, waste, wastewater, and carrying capacity; some destinations continue to experience hot development and seasonal environmental pressure.	Establish environmental indicators for tourism; require waste and wastewater management; promote green transport, renewable energy, and green accommodation standards.
Socio-cultural	Tourism creates employment and business opportunities for communities; community-based and rural tourism have considerable potential.	Benefits are unevenly distributed; cultural commercialisation may occur; community skills and service standards remain limited.	Develop benefit-sharing mechanisms, community training, protection of local culture, tourism cooperatives, local supply chains, and monitoring of resident satisfaction.
Institutional and data	The Law on Tourism 2017, the Tourism Strategy to 2030, the Green Growth Strategy 2021-2030, and visa reforms provide a foundation for reform.	Data remain fragmented; the tourism satellite account is not yet fully updated; inter-sectoral destination governance remains weak.	Develop a national tourism data system; establish regional/destination DMOs; integrate green indicators into tourism planning and investment licensing.

Source: Author's synthesis from data analysis and the sustainable-development framework.

5. Discussion: Bottlenecks in Sustainable Tourism Development

5.1. Growth Model: Scale Is Not Equivalent to Quality

The data show that Viet Nam has recovered impressively in both total visitors and tourism

receipts. The strategic issue, however, is not simply whether the sector reaches or surpasses the 2019 level; it is whether growth quality improves. If growth relies primarily on visitor volume, destinations can fall into price-based competition, intensive resource use, increasing environmental costs, and low profit margins. At the same time, the international market is becoming more segmented. Higher-spending tourists increasingly seek distinctive, safe, personalised, sustainable, and community-responsible experiences.

Consequently, performance measurement should move from "how many tourists" to "which tourists, how much they spend, how long they stay, how much they emit, how much value remains locally, and how residents assess tourism". This is a fundamental shift in tourism governance and requires micro-level data, visitor-expenditure surveys, satisfaction surveys, carrying-capacity assessment, and mechanisms to regulate tourist flows.

5.2. Destination Governance and Carrying Capacity

Sustainable tourism cannot be secured by managing individual enterprises alone. The core issue is destination governance: spatial planning, visitor-flow management, construction control, landscape protection, traffic, waste, wastewater, security, prices, service quality, and crisis communication. Many Vietnamese destinations are highly inter-sectoral, but coordination is fragmented among tourism, construction, natural resources and environment, transport, culture, agriculture, and local governments.

A destination management organization (DMO) model should be developed with clear coordination authority, data capacity, budget, and accountability. A DMO is not merely a tourism-promotion body; it must also manage carrying capacity, environmental standards, market communication, resident consultation, and business linkages.

5.3. Environmental Bottlenecks: Data Gaps and Economic Instruments

Viet Nam's green-growth strategy requires lower emission intensity, greening of economic sectors, and sustainable consumption. In tourism, however, data on carbon emissions, water consumption, energy use, waste, wastewater, and ecosystem pressure are not yet regularly compiled at the destination level. Without such data, it is difficult to design effective instruments such as carrying-capacity quotas, environmental fees, green standards, or green-finance incentives.

Another limitation is the absence of robust mechanisms to convert conservation value into financial resources. Many nature and heritage destinations attract tourists because of public resources, but revenue for conservation, ecosystem restoration, community training, and environmental infrastructure remains limited. Mechanisms such as destination conservation funds, visitor fees, ecosystem-service contracts, and responsible business contributions should therefore be strengthened.

5.4. Social and Community Bottlenecks

Sustainable tourism requires local communities to be active actors in designing, operating, and monitoring tourism activities rather than passive beneficiaries. If communities provide only low-skilled labour or are displaced from livelihood spaces because of land-price pressure, commercialisation, or overcrowding, tourism may increase inequality and social conflict.

In Viet Nam, community-based tourism, agricultural tourism, rural tourism, ethnic cultural tourism, and ecotourism have major potential. To avoid the "staging" of culture, however, policy must standardise community-consent mechanisms, ownership of indigenous knowledge, service training, tourist safety, revenue governance, and cultural protection. The ultimate goal is to increase the share of value retained locally, not merely the number of tours passing through local communities.

5.5. International Integration: Travel Facilitation Must Be Matched by Higher Standards

The 90-day multiple-entry e-visa policy introduced in 2023 was an important reform that improved Viet Nam's destination accessibility. Nevertheless, visas are only a necessary condition. To take advantage of integration, Viet Nam must simultaneously improve airport infrastructure, urban transfer systems, digital information quality, cashless payment, multilingual services, tourist-protection mechanisms, online review governance, and cross-border tourism linkages within ASEAN.

An effective integration strategy also requires destination branding based on green and cultural values. Viet Nam has advantages in heritage, cuisine, nature, history, communities, islands, and tropical agriculture. The challenge is to convert these resources into experiences that are high-quality, story-rich, standardised, and verifiable in terms of environmental and social responsibility.

6. Policy Implications and Governance Recommendations

6.1. Improve Sustainable Tourism Indicators and Data Systems

Viet Nam needs to develop a national indicator set for sustainable tourism that can be applied flexibly at the national, regional, provincial, and destination levels. The indicator set should include four groups: economic indicators (revenue, average spending, length of stay, local value retention), environmental indicators (energy, water, waste, emissions, carrying capacity), socio-cultural indicators (employment, community income, resident satisfaction, cultural preservation), and governance indicators (DMO, digital data, green standards, and transparency of visitor feedback).

The tourism satellite account should be accelerated in line with international practice, connecting data from accommodation, transport, payment systems, digital platforms, attractions, and visitor surveys. Data should support near-real-time management decisions rather than only year-end reporting. For example, when a destination exceeds seasonal carrying-capacity thresholds, the system should help redistribute visitors, adjust ticket prices, open alternative routes, and warn infrastructure managers.

6.2. Establish Green Destination Governance Models

Priority destinations should establish DMOs involving local authorities, enterprises, communities, professional associations, and experts. DMOs should coordinate product development, brand management, quality monitoring, data collection, carrying-capacity analysis, crisis response, and green standards. For sensitive destinations such as heritage sites, national parks, marine protected areas, ancient towns, and mountainous areas, DMOs should adopt rules on maximum visitor numbers, visitor routes, tourist behaviour, waste, wastewater, noise, and construction.

Green destination governance must also integrate tourism planning with urban planning, transport, water-resource management, waste treatment, and conservation. Accommodation and entertainment projects should not be licensed solely on investment capacity; they must also be assessed in terms of environmental carrying capacity, wastewater-treatment capacity, landscape impact, and community benefits.

6.3. Develop Green Finance and Green Standards for Tourism Enterprises

Tourism enterprises, particularly accommodation facilities, restaurants, transport providers, and entertainment complexes, should be encouraged to undertake green transition through preferential credit, local green bonds, environmental funds, support for energy audits, green certification, and technical training. Green standards must be measurable and specific, avoiding superficial "greenwashing".

Possible criteria include the share of renewable

energy, water consumption per guest-night, waste-recycling rate, elimination of single-use plastics, local procurement, training of local labour, biodiversity protection, and disclosure of sustainability data. Certified enterprises should receive priority in promotion, international fairs, high-value market connection, and access to green finance.

6.4. Restructure Products toward Higher Value and Dispersed Pressure

Viet Nam needs to diversify tourism products to reduce pressure on a limited number of coastal and urban destinations. Potential directions include high-quality cultural and heritage tourism, culinary tourism, agricultural tourism, craft-village tourism, community-based tourism, wellness tourism, MICE tourism, river tourism, rail tourism, well-managed night-time tourism, and educational tourism. Each product should be designed as a value chain, rather than as a short sightseeing activity.

Dispersing pressure also requires inter-regional routes and seasonal products. Instead of over-concentrating on summer coastal peaks, destinations can develop cultural, agricultural, culinary, and wellness experiences in low seasons. Rather than promoting only individual destinations, localities should connect clusters of destinations through convenient transport and a shared destination narrative.

6.5. Strengthen Community Capacity and Human Resources

Human resources are a core condition for improving growth quality. After the pandemic, many workers left tourism, producing skills gaps during recovery. Retraining programmes are needed in foreign languages, digital skills, experience management, safety, green service delivery, cultural interpretation, and crisis response. For community-based tourism, training should be linked to household financial management, hygiene standards, heritage storytelling, environmental protection, and online review management.

Benefit-sharing mechanisms must be clear. A share of revenue from tickets, guiding services, homestays, or experience products should be reinvested in community infrastructure, cultural preservation, environmental sanitation, and youth training. When communities perceive long-term benefits, they have stronger incentives to protect resources and improve service quality.

Table 3. Policy recommendation matrix for sustainable tourism development in Viet Nam

Solution group	Main content	Implementing actors	Priority period	Expected outcomes
Data and statistics	Tourism satellite account; sustainable tourism indicator set; destination dashboard	Government, Ministry of Culture, Sports and Tourism, GSO, local governments	2025-2027	Periodic data on visitors, spending, emissions, water, waste, carrying capacity, and resident satisfaction
Destination governance	Establish/strengthen DMOs; carrying-capacity rules; resident-consultation mechanisms	Provincial People's Committees, tourism departments, associations, communities	2025-2028	Reduced overcrowding, better visitor experience, stronger inter-sectoral coordination
Green finance	Green credit, green certification, support for energy and water audits	Banks, environmental funds, local governments, enterprises	2025-2030	Enterprises reduce operating costs and emissions and improve access to higher-value markets
Products and markets	Higher-value products, inter-regional routes, low-season products, higher-spending markets	VNTA, local governments, tour operators	2025-2030	Higher average spending, longer stays, and lower dependence on single markets
Community and human resources	Green-digital skills training; benefit-sharing mechanisms; tourism cooperatives	Local governments, training institutions, enterprises, communities	2025-2030	Higher local value retention, better job quality, and stronger cultural preservation

Source: Author's proposal.

7. Conclusion

The 2015-2024 data show that Viet Nam tourism has strong growth and recovery capacity, but its development model requires restructuring. The pre-pandemic period saw rapid increases in international arrivals, domestic tourism, and tourism receipts. The COVID-19 period revealed the sector's vulnerability to mobility shocks. The recovery period of 2022-2024 shows that the domestic market is a crucial pillar and that international arrivals have almost returned to the 2019 level. However, estimated receipts per visitor trip have not fully recovered, indicating that scale-

based growth has not yet been fully translated into value-based growth.

In the context of green growth and international integration, sustainable tourism development in Viet Nam should be understood as a national competitiveness strategy. A destination cannot compete in the long run without a clean environment, conserved heritage, community benefits, professional services, transparent data, and risk-governance capacity. Tourism policy in the next period should therefore shift from a narrow focus on promotion and visitor growth to an ecosystem-governance approach.

This paper proposes five priority directions: improving sustainable tourism data and indicators; establishing green destination governance models; developing green finance and green standards for enterprises; restructuring products toward higher value and dispersed pressure; and strengthening community capacity and human resources. If implemented coherently, these directions can help Viet Nam become a leading regional destination while contributing substantively to green, inclusive, and sustainable growth.

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Appendix A. Recovery and Preliminary Productivity Indices

Year	International arrivals 2019=100	Domestic tourists 2019=100	Receipts 2019=100	Receipts/visitor 2019=100	Brief comment
2015	44.1	67.1	47.0	74.6	Pre-COVID-19 growth
2016	55.6	72.9	55.2	79.0	Pre-COVID-19 growth
2017	71.7	86.1	71.7	85.7	Pre-COVID-19 growth
2018	86.1	94.1	82.1	88.6	Pre-COVID-19 growth
2019	100.0	100.0	100.0	100.0	Pre-pandemic baseline
2020	21.3	65.9	41.3	71.1	COVID-19 decline
2021	0.1	47.1	23.8	61.4	COVID-19 trough
2022	20.3	119.2	65.6	64.3	Reopening; domestic rebound
2023	70.0	127.1	89.8	76.7	Strong international recovery
2024	97.6	129.4	111.3	89.8	International arrivals nearly recovered; receipts exceeded 2019

Source: Author's calculations from Table 1.