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The Missing Links of Vietnam's Tourism to Become an Attractive and Competitive Tourist Destination

The purpose of the article is to analyze the performance of tourism in Vietnam, based on Vangesayi's (2003) Model of Tourism Destination Competitiveness and Attractiveness (TDCA). Secondary data was collected from the World Economic Forum (WEF) and other resources with the findings presented herein. The findings show that the potential is enormous, but Vietnam tourism is not currently attractive nor is it internationally competitive: a limited tourist infrastructure, combined with a poor hygienic environment and health services, limitations on human resource quality, unfavorable price competitiveness and poor diversification of tourist products have all hurt Vietnam tourism. Based on the analysis herein, the article suggests some solutions to help Vietnam tourism to become a destination for international travelers in the context of fierce competition today.

Key words: Tourism Industry; Competitive Destination; Attractive Destination; Vietnam.

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Introduction

Tourism is becoming one of the fastest-growing industries in the global economy today. According to the United Nations World Tourism Organization (UNWTO), international tourist arrivals grew by 6.8 percent to reach 1,323 million in 2017. The tourism industry accounts for 10.4% of global GDP, valued at US\$8,272.3 billion, and it provides 313 million people with employment. Furthermore, UNWTO forecasts that the number of international tourists will reach 2 billion by 2028, adding a projected \$12,450.1 billion US dollars to the global economy, and creating 413,556,000 jobs in the world. Indeed, such "fumeless" industry becomes one of the significant solutions to maintain the growth and bring the prosperity for both developed and developing countries.

In most of the countries, tourism is expected to play an increasingly important role in the growth of their economy, and the tourism of Southeast Asia countries is no exception. In Thailand, travel and tourism in 2017 has contributed 21.2% to the country's total GDP, generated about 5.8 million jobs for people (WTTC, 2018). Tourism is an important economic activity in Singapore; it contributes more than 10.2% of the country's total GDP and creates more than 323,000 jobs per year. With the advantages of geographical locations and beautiful natural sceneries, tourism in Southeast Asia countries in recent years has become very successful. Also, the effective and long-term tourism promotion strategy, and reasonable investment are important factors that some successful countries such as Singapore, Malaysia, Thailand, and Indonesia use to attract tourists. Comparing to other countries in the region, Vietnam is a country with enormous potential for the tourism industry. However, Vietnam's tourism industry is facing many difficulties and challenges of globalization. Therefore, the consideration and learning of tourism development experiences from successful neighboring countries with similar geographic features in Southeast Asia are necessary and urgent tasks to find out the right direction for the Vietnamese tourism industry

during the period of international economic integration. Although Vietnam has been mentioned as one of the potentially leading destinations in Asia, the tourism industry's performance is subpar when compared to some of the countries in the region with less attractive tourist destinations.

Besides that, the destination image of Vietnam is not well – understood. Nghiê (2014) undertook a review of 177 papers in the destination image literature over the period 2008-2012. In the literature focused on Asian countries, none of them investigate the destination image of Vietnam. This research studies the tourism-related Vietnam's tourism. From a contribution point of view, the lack of research focus on the performance of Vietnam's tourism industry needs to be considered, and this study tends to fill this gap. From the practical point of view, there is a need to understand what experts think about Vietnam, and what the image of Vietnam is in the view of industry experts to develop and implement good strategies to support the development of Vietnam tourism industry. From the analysis of Vietnam's performance, it will be useful for the Vietnamese Government and Vietnamese travel providers to understand the perceptions that tourists have about Vietnam and to evaluate and apply them for further development of the tourism sector. This article discusses the problems of Vietnam, suggesting how it can become an attractive and competitive tourist destination based on the TDCA Model.

Literature Review

Vietnam Tourism Resources

Located in South East Asia where the economic activities have been operating effervescent generally and tourism particularly, Vietnam should have many opportunities to develop its tourism. The diversified of resources in natural (beaches, caves, islands, unique scenic's, rare animals species etc), historical and cultural attractions (historical monuments, Indo-China cultural heritage, French heritage, war heritage), local culture and the ways of

life, region rites and shopping are a good foundation to develop different types of tourism (Henderson, 2000; Miriam, 1995; Tran et al., 2006).

Following the reform for trade and industry, the progression of the economy, quality of living standards, and social infrastructure of Vietnamese is evident. The construction of accommodation facilities and leisure complexes in the major tourist areas can be viewed as a consequence of these reforms. These attributes are advantages for Vietnam to achieve the country's potential of its tourism industry, developing tourism attractions, promoting higher demand among domestic tourists and international tourists. Tirasatayapitak (2009) indicates that the stability and security and the hospitable and friendly Vietnamese people are also advantages for Vietnam to project a positive image of Vietnam as a safe tourist destination. Besides that, the development of human resources for the tourism industry in term of high-quality education is a great resource to tourism industry development.

The friendly and hospitable nature of Vietnamese people provides a strong foundation for the development of the tourism industry in Vietnam and establish Vietnam as an attractive destination for holidaymakers in all over the world (Miriam, 1995).

The Model of Tourism Destination Competitiveness and Attractiveness (TDCA)

Vengesayi's TDCA model proposes connecting the elements core to a competitive and attractive destination including destination investment and tourist expectations towards the destination. The TDCA model suggests that the theory of demand and supply can support this conceptualization by focusing on two different perspectives: the destination appeal (demand perspective) and the destination competitiveness (supply perspective). By investigating both concepts, this model can provide an overview of TDCA dynamics. The TDCA model proposes that considering both destination supply factors and tourist demand factors will help in creating an environment in which tourism development can flourish and be satisfactorily consumed (Vengesayi, 2003).

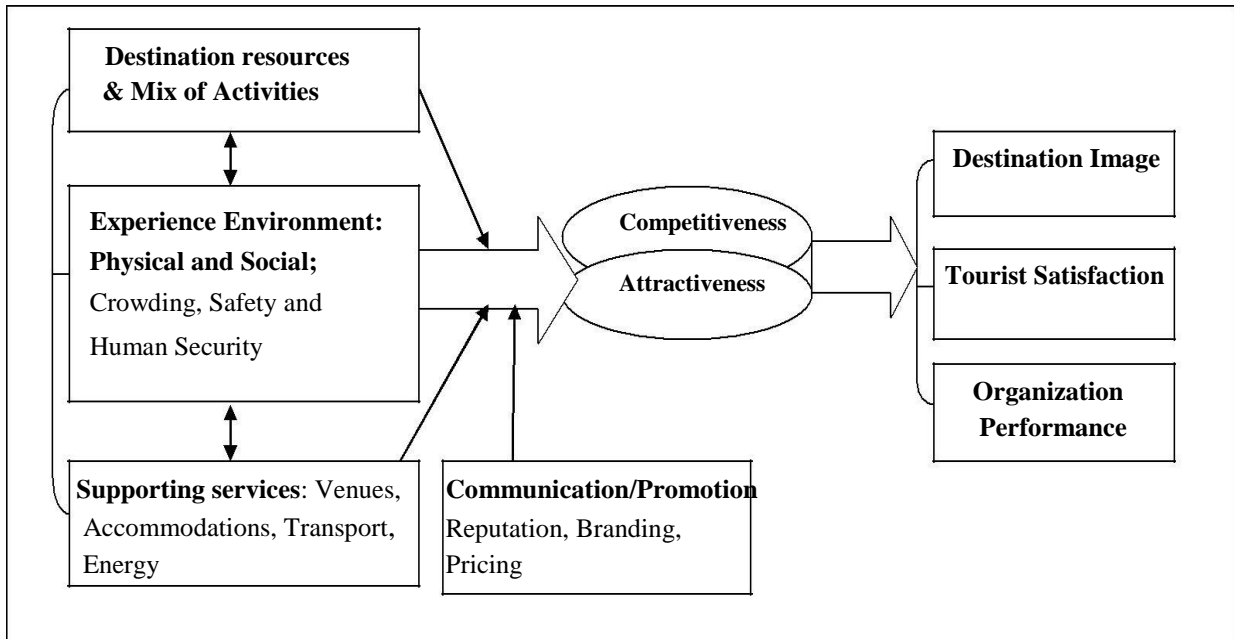


Figure 1. Conceptual Model of TDCA

Source: (Vengesai, 2003)

Features of the Conceptual Model of TDCA

The TDCA model suggests that destination supply and tourist demand factors are the core elements for tourism development. In particular, the destination experience environment is considered actively relevant to the determination of TDCA, enhanced by (a) the availability of an attractive mix of activities; (b) Experience Environment; (c) the supporting factors; and (d) Reputation, branding and the trip cost are proposed to moderate the relationship. The discussion of features of the TDCA model and hypothesized relationships are presented below:

Attractions and Mix of Activities

The model suggests that the combination of a destination's mix of tourist activities and attractions is directly related to the attractiveness and competitiveness of the site. The attractiveness is the key motivations for destination choice (Bianchi, 2018). This is also the fundamental reason why potential tourists choose a more attractive destination. Researchers have grouped, categorized, and classified attractions differently. Goeldner et al., (2000) categorized attractions into five main groups: natural, cultural, recreation, events, and

entertainment. They argued that tourists would choose and stay longer at a destination where there are a variety of attractions and a mix of activities offered. The activities at the destination are a pull factor and represent one of the most important aspects of the destination appeal. Moreover, destination managers can control the influence of the mix of activities. The mix of activities is the result of the destination initiative and creativity. The activities are important as tourists increasingly seek experience rather than a more passive visitation (Zoltan & Masiero, 2012; Crouch & Ritchie, 1999).

Supporting Facilities

Facilities such as accommodations, transport infrastructure, and services provided affect travel dynamics (Ginting & Sasmita, 2018; Rosentraub & Joo, 2009). The attractiveness of a destination is enhanced by the ability to provide amenities that tourists may enjoy at the destination. This model indicates that a destination is competitive when the supply of services and facilities is more competitive than alternative destinations. Furthermore, the model argues that the level and range of destination supporting facilities and the management capabilities of the Destination Management Organization (DMO) are associated with its attractiveness and competitiveness.

Experience Environment

Clarke & Schmidt (1995) identified four elements of experience (service) environment, including the physical facility, environment, location, and interpersonal conditions. Accordingly, the service environment was assumed to have an impact on an individual's behavior in three ways: cognitively, physiologically, and affectively. Moreover, Kotler (1973) defined the experience environment as the purchase and consumption environment to create specific emotions of customers to enhance and maintain purchase affordability. This environment was perceived through the five senses.

Studies of tourist behavior suggest that the environment is an integral part of the travel experience, and it plays an important role in the satisfaction, attractiveness, and competitiveness of a certain destination. The TDCA model categorizes the experience environment and identifies major elements that shape the destination environment, such as crowding, safety, and security, human resources, as well as issues concerning competition and cooperation.

Tourism and physical environment cannot be separated because most of the destinations are based on the natural resources available. However, the physical environment alone is not enough, but how these resources are managed is a crucial issue (Middleton & Hawkins, 1998). Since the environmental quality is correlated significantly with the attractiveness of a destination, a well-managed environment is considered one of the most attractive destinations (Mossberg, 2007; Mihalič, 2000).

In tourism, crowding plays an important role, affecting the perception of attractiveness and competitiveness of a destination, leading to the satisfaction of tourists. Crowding is an environmental characteristic that significantly affects the behavior and social interaction of people. It reduces the freedom of movement and goal achievement. Crowding affects consumers in two ways, psychologically and physiologically (Eroglu et al., 2005)

Human resources have been identified as one of the major issues that global tourism is facing in the 21st century (Baum, 2015). The availability of well-trained and professional staff is an essential component anywhere (Briguglio & Vella, 1995). Because the experience quality of tourists is related to human resources, a destination with high-quality human resources is considered a competitive advantage (Crouch & Ritchie, 2005).

Another issue pointed of this model is the safety and security: key requirements for growth, attractiveness, and competitiveness of a destination. Without safety, destinations cannot successfully compete as potential tourists do not want to visit a place which they

perceive as unsafe (Cavlek, 2002). Safety and security have been identified as one of the five forces in promoting tourism development (Chiang, 2000) and as an important factor in destination choice (George & Booyens, 2014).

Experience Environment is an important element of the TDCA Model. The components of the experience environment can either enhance or reduce competitiveness. Tourists require a safe environment, attractive destinations, professional staff, and excellent service. Thus, a favorable destination environment is required for tourists to enjoy and to be satisfied with their travel experience.

Communication and Promotion

In communication and promotion, the model indicates three aspects: branding, reputation, and pricing; each of which has a significant impact on tourism performance in a particular destination. The destination brand is considered a communication device as it helps tourists to easily identify and distinguish one destination from competitors. Thus, it can accelerate the process of choosing a destination. The destination brand expresses the extent and performance of a destination (d’Hautesserre, 2001). Reputable destinations mean increased visiting potential and longer stays. Therefore, possessing a positive reputation is a competitive advantage. Like branding, reputation plays an important role in the relationship between travelers and travel destinations. A reputable destination ensures the experience quality that travelers seek while traveling. The more positive the reputation, the greater the affordability will increase, and the longer the stay will be (Anholt, 2016).

The model also pays attention to pricing. The costs related to a trip can be a decisive factor in choosing a destination, thereby determining the competitiveness of the destination. Travelers only want to pay for a trip when they believe it is worthwhile. The cost of travel experience includes the costs of transportation, accommodations, foods, and tourism services. Competing on price is determined as the difference between the price and the volatility of

exchange rates, the productivity of a variety of tourism components and other qualitative factors affecting the attractiveness of a destination (Dwyer et al., 2003). TDCA is determined by both price and non-price factors. Destinations need to pay attention to the competitiveness of their prices with other alternative destinations.

Outcomes of TDCA

The outcomes of this model focus on tourist satisfaction, destination image, and organization performance. TDCA has defined tourist satisfaction as the result of the interaction between a tourist's experience at the destination area and the expectations he/she has about the destination before arrival, based on the Expectations-disconfirmation paradigm. The satisfaction of travelers is one of the great important factors because it affects the willingness to come back and recommend the destination to their relatives and friends. Pizam & Ellis (1999) argue that tourist satisfaction can be used to measure competitive strengths and weaknesses by determining tourist perceptions of competitive choices. Destination attractiveness is related to perceived satisfaction (Medina-Muñoz & Medina-Muñoz, 2014).

Tourist destination image affects the subjective perception, behavior, and the choice of a destination of tourists (Stylidis et al., 2014). Destination image is also related to the position, competitiveness, and strategies (Khin et al., 2014) and, thus, is a concept that can help explain the competitiveness in tourism. For the overall destination performance, various statistical measures have been proposed. For example, the total visits and the related measures such as the growth rate and average length of stay, as well as total destination and employment creation are included as measures of TDCA. More meaningful measures are net tourism receipts, and the per capita net tourism receipts have been proposed (Jayawardena & Ramajeessingh, 2003).

Methodology

Based on the specific components of TDCA model, this article has used the data from the UNWTO, World Economic Forum, Vietnam National Administration of Tourism and the General Statistics Office of Vietnam to assess the performance of Vietnam tourism industry in comparison with other countries in the Southeast Asia region. Focus is on criteria such as (a) tourist attractions, (b) tourism supporting facilities, (c) tourism enabling environment, (d) government prioritization, (e) health and hygiene in tourism, (f) human development, (g) environmental sustainability, and (h) communication and promotion. Thereby several solutions are given based on the limitations that Vietnam tourism faces.

Findings and Discussion

Tourism Supporting Facilities in Vietnam

Tourism supporting facilities such as roads, airport infrastructures, and accommodations are seen as a big challenge for Vietnam tourism. According to the 2017 Travel & Tourism Competitiveness Report from the World Economic Forum (WEF), Vietnam travel was ranked 67th/136. It was also ranked 14th in the region, behind Singapore, Malaysia, Thailand, and Indonesia. One of the reasons that Vietnam tourism has been ranked low in travel and tourism competitiveness is because of poor tourism-supporting facilities compared to other countries in the world.

Table 1. T&T Competitiveness ranks on Infrastructures index of Vietnam in Comparison with top 4 Destinations in Southeast Asia

T&T Competitiveness Index	Singapore	Malaysia	Thailand	Indonesia	Vietnam
Air Transport Infrastructure	6	21	20	36	61
Ground & Port Infrastructure	2	34	72	69	71
Tourist Service Infrastructure	24	46	16	96	113

Source: WEF, 2017

The Travel and Tourism Competitiveness Index of 2017 has divided Infrastructures into three groups, including Air Transport, Ground & Port and Tourist Service Infrastructure. The table above shows that Vietnam has less-developed infrastructure than the four leading countries of Southeast Asia: Vietnam was ranked 61/136 for air transport infrastructure while Singapore was ranked best (6) in the region. Vietnam was ranked 71 in Ground & Port Infrastructure, while Singapore has one of the best ground and port infrastructures in the world (2nd). For Tourist Service Infrastructure, Vietnam ranked lowest (113/136), while neighboring country Thailand has the best in the region. Vietnam possesses many favorable natural resources, but poor infrastructure has made Vietnam the least competitive of the four countries in the region.

Tourism Enabling Environment in Vietnam

In tourism enabling environment, this paper presents Government prioritization, Health and Hygiene, Human resource development, and environmental sustainability in the Tourism Industry in Vietnam.

Government Prioritization on Tourism Industry in Vietnam

Table 2. T&T Competitiveness ranks on Government Prioritization index of Vietnam in Comparison with top 4 Destinations in Southeast Asia

T&T Competitiveness Index	Singapore	Malaysia	Thailand	Indonesia	Vietnam
Government prioritization of industry	10	24	14	67	79
T&T gov't expenditure (% budget)	7	109	80	13	114

Source: WEF, 2017

The extent to which the government has given priority to the tourism sector has an important impact on the competitiveness of the destination. By making clear that the industry is of primary concern, the Government can provide funding for development projects needed and coordinate with external resources to develop the tourism industry (WEF, 2017). In the

Strategy on Vietnam's tourism development until 2020, vision to 2030, the Government of Vietnam states that to maintain tourist resources, there must be investment and policies for tourism development. The priority is given to development projects in the national centers of tourism, urban areas, travel routes, and destinations in remote and disadvantaged socio-economic areas with the potential for tourism development. The strategy also calls for implementing policies to encourage social participation and attract investment into the country for the development of tourism technical infrastructure, human resources, and promotion (VNAT, 2017). Although the missions have been clearly outlined in this policy, based on the reports of T&TCI, the indices of Government prioritization of T&T industry and T&T Gov't expenditure (% Gov't budget) of Vietnam are still significantly lower than the other countries in the region, respectively 79 & 114/136.

Health and Hygiene in the Tourism Industry in Vietnam

According to TDCA Model and T&TCI in 2017, Health and Hygiene is one of the most important factors for the tourism competitiveness anywhere because tourists are only interested in destinations where they believe that there will be assured of the quality of drinks and food, and good hospital care in case they get sick during the trip.

According to the final report of the Ministry of Health 2016, the average rate of doctors was about seven per 10,000 people in Vietnam. Vietnam was classified as countries with a high rate (more than five doctors/10,000 inhabitants). Nonetheless, medical care was unevenly distributed by region. Doctors were most concentrated in the major cities such as Hanoi and Ho Chi Minh City, with a rate of 14 doctors per 10,000 people; in other areas, however, there were only 4-5 doctors per 10,000 people. According to the T&TCI report of 2017, Vietnam was ranked 82/136 countries in health and hygiene, while Singapore was ranked 62, and Malaysia is 77 (WEF, 2017).

Table 3. T&T Competitiveness ranks on Health and Hygiene index of Vietnam in Comparison with top 4 Destinations in Southeast Asia

T&T Competitiveness Index	Singapore	Malaysia	Thailand	Indonesia	Vietnam
Health and Hygiene	62	77	90	108	82

Source: WEF, 2017

Human Development in the Tourism Industry

Tourism human resources play an important role, especially in the process of providing services to tourists. If a destination has well-trained personnel, it can ensure the effectiveness of the service quality and satisfaction for tourists. According to the Institute for Tourism Development Research (ITDR), 2015, approximately 43 percent of the total workers in the industries have gone through professional training in tourism, 38 percent has been trained in other sectors, while another 20 percent has only on-site training. The tourism labor that has passed vocational training or college reached 51 percent, with the number of those has gone through under vocational training was 39.3 percent and those with university training or higher education were 9.7 percent.

The ITDR's research on foreign language skills of tourism human resources suggests that only about 60 percent of the tourism workforce can communicate in foreign languages, including English (42 percent), Chinese (5 percent), French (4 percent) and other languages (9 percent). This limitation applies to Vietnam tourism as well. According to T&TCI 2017, the qualification of the labor force, and extent of staff training was 69 and the treatment of customers was only 107; great distances behind the other countries in the region.

Table 4. T&T Competitiveness ranks on Human Development index of Vietnam in Comparison with top 4 Destinations in Southeast Asia

T&T Competitiveness Index	Singapore	Malaysia	Thailand	Indonesia	Vietnam
Extent of staff training	3	9	53	34	69

Degree of customer orientation	6	18	26	49	107
Hiring and firing practices	3	10	28	27	42

Source: WEF, 2017

Environmental Sustainability in Tourism Industry in Vietnam

The relationship between the environment and sustainable tourism development is inseparable from each other. As the importance of the natural environment for providing an attractive destination cannot be exaggerated, policies and factors need to enhance the environmental sustainability to ensure the attractiveness of the destination in the future (WEF, 2017). The research performed by Milica Sandalj, Anna Treydte, and Stefan Ziegler in 2015 with the support of WWF-Vietnam showed that there were about 3,500 to 4,000 tons of bush meats coming through Vietnamese markets each year. As reported by T&TCI 2017, the Environmental Sustainability of Vietnam ranked very low, only 129.

Table 5. T&T Competitiveness ranks on Environmental Sustainability index of Vietnam in Comparison with top 4 Destinations in Southeast Asia

T&T Competitiveness Index	Singapore	Malaysia	Thailand	Indonesia	Vietnam
Environmental Sustainability	51	123	122	131	129

Source: WEF, 2017

Communication and Promotion

In the TDCA Model, Communication and Promotion are categorized into three areas; branding, reputation, and pricing, of which each has a significant impact on tourism performance in a particular destination.

Branding and Reputation of Tourism in Vietnam

Table 6. T&T Competitiveness ranks on Promotion index of Vietnam in Comparison with top 4 Destinations in Southeast Asia

T&T Competitiveness Index	Singapore	Malaysia	Thailand	Indonesia	Vietnam
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Effectiveness of marketing to attract tourists	5	7	20	51	80
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Source: WEF, 2017

Vietnam should focus on developing the brand of some prominent, high-quality tourism destinations, such as cultural tourism and nature tourism; development of secondary destinations in a sustainable way; and mapping/developing Vietnamese cuisine streets. To realize the development objectives of Vietnam's tourism brand in a professional and uniform direction, one of the pressing needs is a promotion, together with synchronous and long-term solutions such as propaganda and increasing the awareness of brand development to improve the rank of the effectiveness of marketing (80/136).

Pricing of Tourist Products in Vietnam

Table 7. T&T Competitiveness ranks on pricing index of Vietnam in Comparison with top 4 Destinations in Southeast Asia

T&T Competitiveness Index	Singapore	Malaysia	Thailand	Indonesia	Vietnam
Price Competitiveness	91	3	18	5	35

Source: WEF, 2017

The travel-related costs in a destination need to be reduced to broaden their appeal to tourists and facilitate the industry investment (WEF, 2015). One of the advantages of Vietnam's tourism is the ability to compete on price (35), just behind Malaysia (3) and Indonesia (5). However, according to the statistics, Vietnam shows that hotels cost has a rate of 25 percent which is higher than other countries in the area, while food costs and shopping costs also show the higher rates comparing with other countries in the area by 30 percent and 25 percent, respectively.

Conclusion

Based on the findings of this study, implications emerged both academically and practically for the promotion and improvement of the image of Vietnam as a tourist destination.

For the academic discipline of tourism management studies, this study is designed to fill a perceived academic gap that can be said to be due to a perceived lack of research done upon the performance of tourism in Vietnam, nor is there research that gives a comprehensive knowledge base for future researchers writing about Vietnam as a tourist destination.

Practically, the results of this study could be useful for tourism planners and marketers, taking into focus more carefully the enhancing, improving, and maintaining factors that contribute to tourist attraction. Importantly, the principle guideline for this study was to evaluate how support for tourism stakeholders, structured from the beginning to be a part of tourism planning and development must be the key elements in the successful operation, management, and long-term sustainability of tourism destinations. Tourism stakeholders' solid knowledge and experiences in tourism management and industry, professional involvement, and participation in tourism planning and development, and long-term community observation and interactions have all played an important role in tourism destination management. It is hoped that the results, and the recommendations that will follow, will provide valuable information to tourism marketers and planners in Vietnam, providing them with help, hopefully, in evaluating and refining marketing strategies and management in the future. Vietnam will attract more foreign tourists and potential tourists from many different countries over the world.

According to the TDCA Model, while the potential of Vietnam tourism is clear, the facts are that the achievements of Vietnam tourism are still modest and incommensurate with its potential. In the development orientation, in order to enhance competitiveness, the tourism industry should focus on improving the quality of tourism products and services, encouraging investment in further upgrading and developing tourism-supporting infrastructure and technical facilities; focus on developing the unique tourism potential of Vietnam on the basis of exploiting the potential of cultural tourism, ecotourism, and island tourism. It also requires

building and developing high-end tourism products to encourage and create favorable conditions for the construction of luxurious, comfortable, modern, and synchronized resorts.

Vietnam needs to improve the quality of tourism-focused human resources training and development as well to improve the professionalism in tourism activities. The successful development of Vietnam tourism will be a driver for the strong growth and sustainability of Vietnam's economy, contributing to the friendly and hospitable image of the country and people to foreign friends.

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