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Vietnam's Tourism Trends and the Central Highlands Tourism Market toward 2030: Current Landscape, Opportunities, and Development Barriers

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ABSTRACT:- This paper provides an overview of tourism trends in Vietnam and the Central Highlands tourism market for the 2026–2030 period, in the context of the tourism industry's strong post-COVID-19 recovery and its transition toward a growth model driven by experiential value, digital transformation, and sustainable development. The Central Highlands is identified as a region with substantial tourism potential due to its distinctive advantages in highland ecosystems, indigenous cultures, gong cultural heritage, coffee culture, community-based tourism, and nature-based experiences. Recent data indicate positive growth in the region's tourism market, particularly in Lam Dong, Gia Lai, and Dak Lak. However, domestic tourists continue to account for the majority of visitors, while international arrivals remain relatively limited and unevenly distributed across the region. The paper identifies opportunities for tourism development in the Central Highlands through stronger highland–coastal linkages, the development of cultural, ecological, and experiential tourism, digital tourism marketing, and sustainable tourism practices. At the same time, it highlights key barriers related to human resources, tourism product development, destination marketing, digital transformation, and the preservation of local cultural identity.

Keywords: *Central Highlands tourism; tourism trends; development opportunities; development barriers.*

I. INTRODUCTION

Following the post-COVID-19 recovery period, Vietnam's tourism industry has entered a new growth cycle, marked by a strong rebound in international arrivals, domestic tourism, and total tourism revenue. In 2025, Vietnam's tourism industry recorded more than 21 million international visitor arrivals, nearly 137 million domestic tourist trips, and approximately VND 1 quadrillion in total tourism revenue (Vietnam National Authority of Tourism, 2026b). These milestones indicate that the tourism market has moved beyond a period of mere recovery and entered a new phase of growth restructuring, in which the quality of tourist experiences, destination competitiveness, digital transformation, and sustainable development have become key policy priorities (Ministry of Culture, Sports and Tourism, 2026; Vietnam National Authority of Tourism, 2026b).

From a long-term perspective, Vietnam's Tourism Development Strategy to 2030 identifies tourism as a key economic sector and emphasizes its development in a professional, high-quality, and efficient manner, while ensuring the responsible utilization of natural and cultural resources. The Tourism System Planning for the 2021–2030 period, with a vision to 2045, further emphasizes the need to organize tourism spatially around regions, growth poles, driving areas, and tourism corridors. This policy orientation provides an important foundation for developing regions with distinctive advantages in ecological resources, cultural heritage, and experiential tourism, particularly the Central Highlands.

In the context of Vietnam's tourism development in recent years, the Central Highlands has emerged as a region with considerable tourism potential, owing to its distinctive combination of ecological resources, highland climate, indigenous cultures, gong cultural heritage, community-based tourism, agriculture, and nature-based experiences. While the Central Highlands was previously positioned primarily as a domestic tourism destination associated with mountainous landscapes, coffee culture, waterfalls, and the cultural traditions of ethnic minority communities, administrative boundary changes introduced in 2025 have significantly expanded the region's tourism development space by strengthening linkages between the highlands and coastal areas. The newly restructured Gia Lai, Dak Lak, and Lam Dong provinces not only inherit the traditional tourism resources

of the Central Highlands but are also connected with major coastal tourism centers, thereby creating favorable conditions for the development of interregional, multi-experience tourism products and potentially extending visitors' length of stay (National Assembly Standing Committee, 2025).

The Central Highlands tourism market has recorded positive growth in visitor arrivals. Lam Dong experienced particularly strong growth, receiving more than 20.7 million visitors in 2025, including approximately 1.287 million international visitors (Nguyen Duc Phu, 2025). The newly restructured Gia Lai province received approximately 12.4 million visitors in 2025, comprising 125,000 international visitors and 12.275 million domestic visitors (Ministry of Culture, Sports and Tourism, 2025a). The newly restructured Dak Lak province welcomed more than 7.3 million visitors in 2025 and continued to record over 2.3 million visitors in the first quarter of 2026 (Nguyen Cong Ly, 2026). However, these figures also indicate that the Central Highlands tourism market continues to rely predominantly on domestic tourists, while the proportion of international visitors remains relatively low and unevenly distributed across provinces.

This situation calls for new approaches to tourism development in the Central Highlands that go beyond merely increasing visitor numbers to focus on enhancing the quality of tourist experiences, expanding international markets, developing tourism products with distinctive cultural identities, strengthening destination marketing and communication, improving human resource capacity, accelerating digital transformation, and ensuring sustainable development. Therefore, examining emerging tourism trends, the profile of the new generation of tourists, and the opportunities and barriers facing tourism development in the Central Highlands during the 2026–2030 period is of considerable practical significance. Such an analysis can provide an important foundation for tourism policy formulation, tourism product development, and the enhancement of destination competitiveness.

II. TOURISM TRENDS FOR 2026-2030: FROM VISITOR GROWTH TO VALUE-DRIVEN GROWTH

Recent international literature indicates that the global tourism industry is evolving along two major dimensions. The first is technological transformation, encompassing artificial intelligence, big data, digital platforms, smart destinations, personalized travel experiences, and social media communication (Chon & Hao, 2024). The second is human and culture-centered tourism, which emphasizes authentic local experiences, ethnic cuisine, spiritual tourism, solo travel, community-based tourism, and responsible tourism. These two dimensions should not be viewed in isolation. Rather, destination competitiveness during the 2026–2030 period will increasingly depend on the ability to integrate technological innovation with cultural depth and meaningful human experiences.

For Vietnam, these trends are particularly significant because the country's tourism resources extend far beyond coastal and island destinations and major urban centers to encompass diverse cultural landscapes, ecosystems, agricultural settings, traditional craft villages, heritage resources, culinary traditions, and community life. Against the backdrop of intensifying regional competition, Vietnam is gradually shifting its destination positioning from that of a "beautiful and affordable destination" toward one characterized by "rich and distinctive experiences, cultural identity, safety, smart tourism, and sustainability." Vietnam's Tourism Marketing Strategy to 2030 similarly aims to promote the country as one of Southeast Asia's leading attractive destinations while strengthening the brand and competitiveness of Vietnamese tourism (Tourism Information Technology Center, 2023).

An important implication of these trends is that inland tourism regions, including the Central Highlands, should be recognized as distinctive priority destinations rather than alternatives that merely replicate coastal or urban tourism centers. The Central Highlands possesses considerable potential to develop differentiated tourism products based on its highland ecosystems, ethnic minority cultures, agricultural landscapes, coffee culture, distinctive climate, traditional festivals, folk music, and community-based experiences. These unique resources provide a strong foundation for the region to create distinctive tourism value and strengthen its competitive position within Vietnam's evolving tourism landscape.

III. THE CENTRAL HIGHLANDS IN VIETNAM'S TOURISM DEVELOPMENT LANDSCAPE

The Central Highlands occupies a distinctive position on Vietnam's tourism map due to its unique combination of natural resources, highland climate, mountainous and forest landscapes, waterfalls, lakes, national parks, agricultural resources, and diverse indigenous cultures. The Space of Gong Culture in the Central Highlands represents an important cultural asset that contributes significantly to the region's distinctive identity. These values provide a strong foundation for the development of cultural tourism, ecotourism, community-based tourism, agritourism, experiential tourism, and tourism products associated with coffee culture, traditional festivals, music, cuisine, and indigenous ways of life (UNESCO, 2022).

From a policy perspective, the Central Highlands has been recognized as one of Vietnam's regions with considerable potential for ecotourism and cultural tourism development. Regional tourism development orientations emphasize the preservation of cultural identity, the development of distinctive tourism products, stronger interregional linkages, and an enhanced role for local communities in the tourism value chain. This orientation is consistent with emerging tourism trends, as travelers increasingly seek authentic experiences characterized by cultural depth and a strong sense of responsibility toward the environment and local communities (Vietnam News Agency, 2024).

However, the reorganization of provincial-level administrative units since 2025 has significantly reshaped both the statistical boundaries and governance landscape of tourism development in the region. Several former Central Highlands provinces have been merged with provinces in the South Central Coast: Gia Lai with Binh Dinh; Dak Lak with Phu Yen; Lam Dong with Dak Nong and Binh Thuan; and Kon Tum with Quang Ngai. Consequently, the emerging tourism development space increasingly reflects a "highlands–coastal–marine" spatial model, which no longer fully corresponds to the traditional geographical boundaries of the Central Highlands prior to the administrative restructuring (National Assembly Standing Committee, 2025).

IV. CURRENT STATUS OF THE TOURISM MARKET IN THE CENTRAL HIGHLANDS AND RELATED PROVINCES

Recent data indicate that the tourism market in the Central Highlands and related provinces has experienced positive growth, although its market structure continues to rely predominantly on domestic tourists. Lam Dong has emerged as a major tourism growth pole, particularly in attracting international visitors, while the newly restructured Gia Lai and Dak Lak provinces have expanded their tourism market scale following the administrative mergers, which extended their tourism space toward coastal areas. Meanwhile, the former Kon Tum and Dak Nong provinces have smaller tourism markets but possess considerable potential for ecotourism, community-based tourism, and cultural experiences.

Three major characteristics can be identified from Table 1. First, Lam Dong represents the most significant tourism growth pole among the provinces associated with the Central Highlands, demonstrating a substantially greater capacity to attract international visitors than the other provinces. In 2025, Lam Dong received approximately 1.287 million international visitors, primarily visiting Da Lat, accounting for approximately 6.2% of the province's total visitor arrivals. This proportion was considerably higher than those recorded in Gia Lai and Dak Lak, where international visitors continued to represent only a small share of the overall tourism market (Dak Lak Newspaper, 2026; Ministry of Culture, Sports and Tourism, 2025b; Vietnam National Authority of Tourism, 2025).

Second, the newly restructured Gia Lai and Dak Lak provinces experienced a substantial expansion in tourism market scale following the administrative mergers. In 2025, Gia Lai was estimated to have welcomed 12.4 million visitors, including 125,000 international visitors and 12.275 million domestic visitors. Dak Lak received more than 7.3 million visitors in 2025 and generated tourism revenue exceeding VND 13.6 trillion. In the first quarter of 2026, the province continued to record 2.3 million visitor arrivals, including 41,000 international visitors. These figures indicate that the tourism market is expanding rapidly; however, its visitor structure remains strongly dominated by the domestic market (Dak Lak Newspaper, 2026; Ministry of Culture, Sports and Tourism, 2025b; Vietnam National Authority of Tourism, 2026a).

Third, traditional Central Highlands areas, such as the former Kon Tum and Dak Nong provinces, have smaller visitor markets but possess considerable potential for developing distinctive tourism products. In 2024, Kon Tum received approximately 2.3 million visitors, including around 8,500 international visitors. During the first six months of 2025, the province welcomed nearly 1.5 million visitors, of whom more than 7,500 were international visitors. Dak Nong, meanwhile, set a target of 803,000 visitor arrivals for 2025, including 7,400 international visitors and 795,600 domestic visitors. These figures suggest that there remains substantial potential for expanding the international tourism market; however, realizing this potential will require further improvements in tourism products and services, destination marketing and communication, and market connectivity (Lam Dong Newspaper, 2024; Thanh Nien Newspaper, 2024; Vietnam News Agency, 2025).

The Emerging Tourist Profile and Implications for the Central Highlands: During the 2026-2030 period, the profile of tourists visiting Vietnam in general and the Central Highlands in particular is expected to exhibit several emerging characteristics. First, tourists are increasingly seeking immersive and meaningful experiences rather than merely visiting tourist attractions. They are showing greater interest in indigenous cultures, local cuisine, interactions with local communities, outdoor activities, festivals, handicrafts, local stories, and educational experiences. This trend presents a natural opportunity for the Central Highlands, where distinctive tourism products can be developed around gong culture, traditional longhouses, festivals, coffee culture, elephants, forests, waterfalls, agriculture, and community life.

Second, younger tourists, particularly Generation Z and independent travelers, are strongly influenced by social media, short-form videos, online reviews, and user-generated content (Nguyen Hoang Phuc, 2026;

Nguyen Hong Quan et al., 2023). This trend is transforming the ways in which destinations are discovered, selected, and shared among travelers. In the Central Highlands, destinations such as Da Lat, Mang Den, Buon Ma Thuot, Pleiku, Bien Ho, waterfalls, coffee farms, community-based tourism villages, and highland travel routes possess considerable potential for generating visually engaging content. However, converting social media attention into actual bookings requires destinations to provide clear and accessible information, easily bookable tourism products and services, reliable visitor experiences, and consistent service quality.

Third, demand for wellness, nature-based, healing, and slow tourism has shown an increasing trend in the post-pandemic period (Luan et al., 2026). The Central Highlands' favorable climate, forest landscapes, lakes, waterfalls, and tranquil environment provide significant advantages for the development of wellness tourism, meditation retreats, farm-based experiences, agriculture-oriented resort tourism, and green tourism experiences. This development direction is consistent with the broader trend toward sustainable tourism while also helping to alleviate pressure on coastal, island, and urban destinations that may face seasonal overcrowding.

V. OPPORTUNITIES AND BARRIERS TO TOURISM DEVELOPMENT IN THE CENTRAL HIGHLANDS DURING 2026-2030

** OPPORTUNITIES:*

First, the Central Highlands has an opportunity to reposition its destination brand around the concept of a "cultural–ecological–experiential highland destination." The region's distinctiveness does not derive from any single type of tourism, but rather from its ability to integrate climate, landscapes, agriculture, music, cuisine, festivals, and community life into a comprehensive tourism experience. If effectively designed and developed, the Central Highlands could become a destination for immersive and meaningful experiences, well aligned with emerging trends in responsible tourism, personalized travel, and identity-seeking tourism.

Second, the administrative restructuring creates opportunities for developing "highlands–coast" interregional tourism products. The newly restructured Gia Lai province could connect Pleiku, Bien Ho, and highland cultural experiences with Quy Nhon and the coastal tourism resources of the former Binh Dinh province. Similarly, the newly restructured Dak Lak province could link Buon Ma Thuot, Lak Lake, national parks, and coffee-related tourism with the coastal attractions of the former Phu Yen province. The newly restructured Lam Dong province could integrate Da Lat with the former Dak Nong and Binh Thuan provinces to create a diversified highland-to-coast tourism product chain, ranging from geopark experiences to coastal tourism. At the same time, Da Lat tourism should continue to be developed in a manner that preserves and promotes its distinctive tourism products and signature events, such as the Da Lat Flower Festival. Such an approach could contribute to extending visitors' length of stay, increasing tourism expenditure, and dispersing tourist flows across a wider range of destinations.

Third, trends in digital transformation and digital communication offer significant opportunities for emerging destinations. With an appropriate content strategy, Central Highlands provinces can leverage digital channels such as TikTok, YouTube, Instagram, digital maps, search data, and online booking platforms to promote their distinctive tourism products. In 2025, the communication strategy surrounding international events such as the International Tea Festival (Tea Carnival), which featured the participation of more than 80 international Miss Cosmo contestants, generated considerable attention and reportedly attracted more than 60,000 visitors and interested participants to Da Lat (Gia Lai Newspaper, 2025). Vietnam's Tourism Marketing Strategy to 2030 similarly emphasizes the need to diversify and innovate tourism communication approaches, accelerate the application of digital technologies, and strengthen the competitiveness of destination brands (Vietnam National Authority of Tourism, 2023).

Fourth, the Central Highlands is well suited to sustainable and community-based tourism development models. Community-based tourism villages, agricultural products, coffee-related tourism products, traditional brocade weaving, ethnic cuisine, festivals, and traditional performing arts can generate sustainable livelihoods for local communities if they are developed according to the principles of equitable benefit-sharing, cultural preservation, and the avoidance of excessive commercialization. These conditions are essential for transforming cultural resources into economic value while safeguarding local cultural identity and ensuring that tourism development does not undermine the authenticity of indigenous heritage.

***Barriers and Emerging Challenges:**

Despite its considerable opportunities, tourism development in the Central Highlands continues to face several significant barriers. The first is the region's heavy dependence on the domestic tourism market. Data from Gia Lai, Dak Lak, Kon Tum, and Dak Nong indicate that international visitors account for only a small proportion of total tourist arrivals, while domestic tourists remain overwhelmingly dominant. Although this market structure helps sustain visitor volumes in the short term, it may constrain opportunities to increase tourism expenditure, internationalize tourism products, and strengthen the region's destination recognition within the broader regional tourism market.

The second barrier concerns the quality and standardization of tourism products. Many tourism products in the Central Highlands continue to rely heavily on existing resources, such as natural landscapes, climate, indigenous cultures, and festivals, but have yet to be effectively transformed into well-designed and market-ready experiences supported by structured itineraries, consistent service standards, compelling brand narratives, and the capacity to be marketed internationally. Without appropriate management, community-based and cultural tourism may become overly staged or commercialized, while tourism models may also be replicated across destinations without sufficient attention to local distinctiveness.

The third barrier relates to tourism human resources. At the national level, Vietnam's tourism industry continues to face shortages in both the quantity and quality of its workforce. Some sources indicate that the industry requires approximately 40,000 new workers and 25,000 retrained workers annually, while the training system supplies only around 20,000 workers per year. Moreover, the proportion of workers with specialized professional training remains relatively low, and foreign-language proficiency continues to represent a significant weakness (Nhan Dan Newspaper, 2023; Hien et al., 2020). In the Central Highlands, these constraints are even more pronounced in skill-intensive segments, including international tour guiding, community-based tourism operations, accommodation service management, digital marketing, destination storytelling, and specialized tourism product design.

The fourth barrier is the uneven capacity for destination marketing and digital transformation. Although many localities have implemented tourism promotion, demand-stimulation initiatives, and communication activities through digital platforms, considerable limitations remain in terms of professionalism, performance measurement, content production capabilities, and the ability to convert promotional activities into actual tourism sales. In international tourism markets, destination marketing cannot be limited to image-based promotion alone. Rather, it requires an integrated ecosystem encompassing tourism data, online-bookable products and services, multilingual information, reliable service provision, and clearly defined target-market strategies.

The fifth barrier concerns the requirements of sustainable tourism development. The Central Highlands is characterized by sensitive ecosystems, water and forest resources, community-based cultural assets, and indigenous livelihood spaces that require careful protection. If not effectively managed, tourism growth may place increasing pressure on the environment, disrupt traditional community life, drive up land prices, generate conflicts of interest, and undermine cultural authenticity. Therefore, tourism development in the Central Highlands should be guided by clearly defined carrying-capacity limits, meaningful community participation, equitable benefit-sharing mechanisms, and appropriate criteria for monitoring environmental and social impacts. Such an approach is essential to ensure that tourism growth generates long-term economic and social benefits while safeguarding the region's ecological resources, cultural heritage, and local community interests.

*** Development Directions and Strategic Implications for Tourism in the Central Highlands, Vietnam:**

Based on the current conditions and emerging trends discussed above, several strategic directions can be proposed for tourism development in the Central Highlands during the 2026–2030 period. First, tourism products should be restructured around integrated experience clusters rather than isolated attractions. These clusters may include coffee and highland agritourism; gong culture and community-based tourism; forest–waterfall–lake ecotourism; wellness and resort tourism; festival tourism; ethnic culinary tourism; and interregional highland–coastal tourism. Such an approach would facilitate the integration of complementary tourism resources into more comprehensive and distinctive visitor experiences.

Second, a data-driven destination marketing strategy grounded in local narratives should be developed. The Central Highlands possesses numerous highly symbolic tourism resources, but these need to be transformed into distinctive and recognizable destination narratives centered on the highland wilderness, coffee culture, the sounds of gongs, traditional longhouses, elephants, waterfalls, climate, agriculture, campfires, local markets, and indigenous communities. Each province should clearly identify its target markets, priority tourist segments, brand messages, and appropriate communication channels, with particular attention to younger travelers, independent international tourists, wellness travelers, and tourists seeking authentic cultural experiences.

Third, tourism workforce capacity should be strengthened at both the community and small-business levels. Training should extend beyond basic hospitality and service skills to encompass foreign-language proficiency, intercultural communication, tourism safety, homestay operations, heritage storytelling, experience design, online review management, digital marketing, and environmental protection. Strengthening these capabilities is essential for enabling tourism in the Central Highlands to transition from a resource-exploitation model toward an experience-based value-creation model.

Fourth, effective interregional coordination mechanisms should be established following the administrative restructuring. The expansion of provincial boundaries creates opportunities to develop longer and more diversified tourism routes; however, it also presents challenges related to coordinated planning, infrastructure integration, data sharing, cross-sector tourism product development, and the equitable distribution

of benefits between highland and coastal areas. If effectively organized, stronger interregional linkages could improve the Central Highlands' access to international tourism markets by connecting the region more closely with major aviation gateways and established coastal tourism centers.

VI. CONCLUSION

The Central Highlands is at a favorable juncture for repositioning itself within Vietnam's tourism landscape. The expansion of the domestic tourism market, the continued recovery of international tourist arrivals, national tourism development policies toward 2030, the growing demand for experiential tourism, and the expansion of highland–coastal linkages collectively create significant opportunities for the region. However, to transform its tourism potential into sustainable competitive advantages, the Central Highlands needs to address persistent barriers related to human resources, tourism product development, destination marketing and communication, data capabilities, tourism service infrastructure, the ability to attract international visitors, and sustainable development.

In addition, a coherent and coordinated policy framework is needed to support tourism development across the region. Government authorities should strengthen coordinated tourism planning among provinces while establishing an enabling institutional environment that encourages tourism enterprises to invest, innovate, and participate more effectively in regional tourism development. Policies concerning talent attraction, workforce development and training, taxation, investment incentives, and tourism demand stimulation should be designed within a medium- to long-term strategic framework, while ensuring sustainability and preserving the distinctive identity of the Central Highlands.

The strategic priority for tourism development in the Central Highlands should therefore extend beyond simply "attracting more visitors." Instead, the region should pursue a value-oriented development model that generates higher-quality visitor experiences, longer lengths of stay, greater tourism expenditure, more tangible benefits for local communities, and lower environmental impacts. Such an approach would enable the Central Highlands to strengthen its destination competitiveness while preserving its distinctive ecological and cultural assets and ensuring the long-term sustainability of tourism development.

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