

Vietnam Tourism Report Q2 2016

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Abstracts

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BMI View: Tourism is a growing industry in Vietnam and the sector has experienced some growing pains in recent years. Poor service standards and uncertainty surrounding visa and investment regulations have contributed to slowing growth rates and for much of 2015 international arrivals figures fell. We do expect to see a recovery in 2016 as Vietnam continues to invest in improving accommodation options and standards and becomes more accessible for visitors from outside of the Asia Pacific region. Investment in transport infrastructure, particularly air travel, will also provide a supportive boost to the travel industry. As such we are forecasting growth across all key market indicators over through to 2020.

Key Updates And Forecasts:

Following a contraction in 2015, we are forecasting a return to growth in Vietnam's inbound tourism market in 2016 and expect government targets of 8.5mn international arrivals to be largely achievable. Extensive marketing and service improvement campaigns and an expansion in regional and global air connectivity will support further growth in inbound tourism throughout the remainder of the forecast period to 2020.

Vietnam presents an increasingly attractive investment destination and the hotel sector is expanding, both in established destinations and in up and coming tourism areas. Major hotel groups such as Accor and Starwood have several new hotels due to open over the course of the forecast period.

Regional markets such as China, Japan and South Korea continue to account for the vast majority of arrivals to Vietnam. Visitor figures have fluctuated over

recent months, impact both by economic trends and regional political tensions, highlighting Vietnam's vulnerability to a decline in regional travel and the importance of diversifying source markets over the long term.

Contents

BMI Industry View

Table: Key Forecasts (Vietnam 2013-2020)

SWOT

Tourism

Industry Forecast

Table: Inbound Tourism (Vietnam 2013-2020)

Table: Tourism Receipts (Vietnam 2013-2020)

Table: Hotel Accommodation (Vietnam 2013-2020)

Table: Tourist Departures and Consumption (Vietnam 2013-2020)

Industry Risk/Reward Index

Tourism Risk/Reward Index

Table: Asia Pacific Tourism Risk/Reward Index

Rewards

Risks

Security Risk

Market Overview

Competitive Landscape

Domestic Hotel Groups

Table: Domestic Hotel Groups

International Hotel Groups

Table: International Hotel Groups

Methodology

Industry Forecast Methodology

Risk/Reward Index Methodology

Table: Weighting Of Indicators

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