

Vietnam Tourism Report Q3 2016

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Abstracts

Includes 3 FREE quarterly updates

BMI View: Following a lacklustre 2015, we expect 2016 to be a year of strong growth for Vietnam's rebounding tourism sector. Rising visitor numbers from the Asia Pacific region, particularly China, as well as improving European tourist numbers will, helped by with concerted government efforts to support the sector, see inbound growth of some 9.2% in 2016, reaching 8.5mn arrivals. Looking ahead, the future is bright for the sector, with high-spending and/or fast-growing source markets such as Japan, China and South Korea all set to contribute to the growing value of the Vietnam's hotel industry and other tourismrelated business. As the industry continues to expand and spread to new destinations, we expect to see significant further opportunities for major global and regional hotel chains.

Key Updates And Forecasts:

The government continues to play a critical and pro-active role in supporting the country's tourism industry. In recent months this has been illustrated by the decision to remove waive visa restrictions for tourists from key source markets. It is also in the process of approving the licence for a fourth national air carrier in a bid to attract more domestic and regional visitors.

The Vietnamese dong's real effective exchange rate has strengthened against the majority of its Asian EM peers in recent quarters. As a result we expect the State Bank of Vietnam to allow for dong depreciation in an attempt to maintain the country's export competitiveness, making Vietnam relatively cheaper and more attractive to regional tourists.

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.

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