

Travel and Tourism in Vietnam to 2019



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1 SUMMARY

Vietnam's Travel and Tourism sector performed well during the historic period (2010–2014), driven by growth in both the domestic and inbound tourism markets. Government initiatives, which focused on promoting tourism during national holidays, contributed to the growth in domestic tourism. In 2014, Thua Thien Hue registered the largest annual growth of XX.XX% in number of domestic trips, driven by various discount offers on tour packages. The province also held tourism road shows in Ho Chi Minh City and Hanoi to attract more domestic tourists. Infrastructural development and tourism investment in emerging source countries such as Russia, Japan, and South Korea contributed to the growth in inbound tourism. Although China remains the leading tourist inbound country in 2014, the growth in tourist arrivals from China was significantly slow during May and June, due to anti-Chinese riots in Vietnam in May 2014.

International arrivals increased at a compound annual growth rate (CAGR) of XX.XX%, with total inbound tourist expenditure rising at a CAGR of XX.XX% during the historic period. The number of visitors from Russia increased significantly at a CAGR of XX.XX%, while tourist arrivals from the US posted the lowest growth at a CAGR of XX.XX% among the top 10 inbound countries. Growth in domestic tourist volumes posted a CAGR of XX.XX%, with expenditure rising at a CAGR of XX.XX%. International departures increased at a CAGR of XX.XX%, mainly due to the emergence of low cost carriers (LCCs) and the increasing spending power of consumers.

The Travel & Tourism Intelligence Center (TTIC) expects Vietnam's tourism sector to continue growing over the forecast period (2014–2019), with international arrivals increasing at a CAGR of XX.XX%, and domestic tourist volumes increasing at a CAGR of XX.XX%.

2 SYNOPSIS

The report provides detailed market analysis, information and insights, including:

- Historic and forecast tourist volumes covering the entire Vietnamese travel and tourism sector
- Detailed analysis of tourist spending patterns in Vietnam for various categories in the travel and tourism sector, such as accommodation, sightseeing and entertainment, foodservice, transportation, retail, travel intermediaries and others
- Detailed market classification across each category, with analysis using similar metrics
- Detailed analysis of the airline, hotel, car rental and travel intermediaries industries

3 REASONS TO BUY

- Take strategic business decisions using historic and forecast market data related to Vietnamese travel and tourism sector
- Understand the demand-side dynamics within Vietnamese travel and tourism sector, along with key market trends and growth opportunities

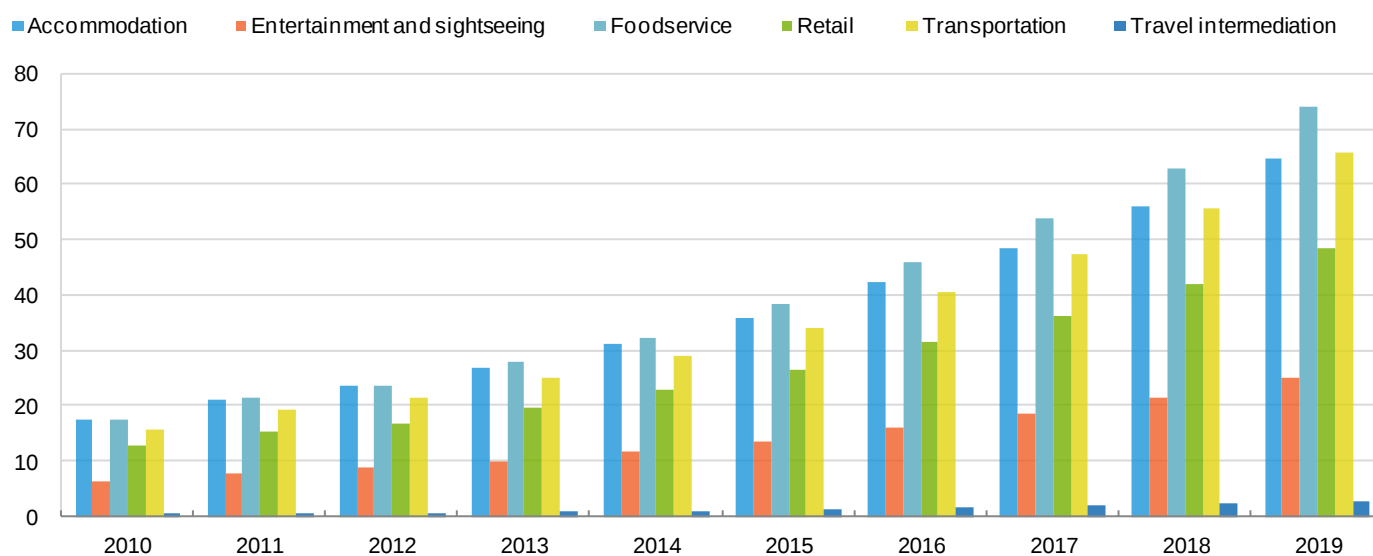
4 TOURISM FLOWS

4.1 The Market

4.1.1 Domestic tourism

Domestic tourism is a major factor driving the Travel and Tourism sector in Vietnam, accounting for XX.XX% of total national tourism expenditure in 2014. This was driven by various stimulation programs launched by the VNAT such as 'Vietnamese people travel across Vietnam', launched in July 2014 with particular focus on stimulating domestic and inbound tourism for Vietnamese residing overseas to visit the country during national holidays.

Figure 1: Vietnam – Domestic Tourism Expenditure (VND Trillion), 2010–2019



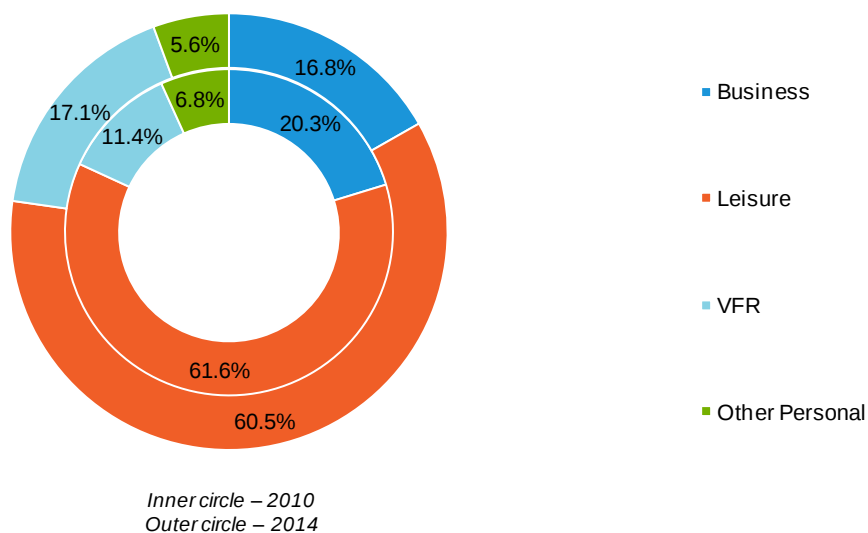
Source: WTTC, National Statistics Vietnam, TTIC Analysis

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4.1.2 Inbound tourism

The number of international arrivals to Vietnam increased from X million in 2010 to X million in 2014, at a CAGR of XX.XX%, supported by an increase in the frequency of flights on key routes, the launch of new routes, and the implementation of tourism stimulation programs.

Figure 2: Vietnam – International Arrivals by Purpose of Visit, 2010 vs 2014



Source: National Statistics Vietnam, TTICAnalysis

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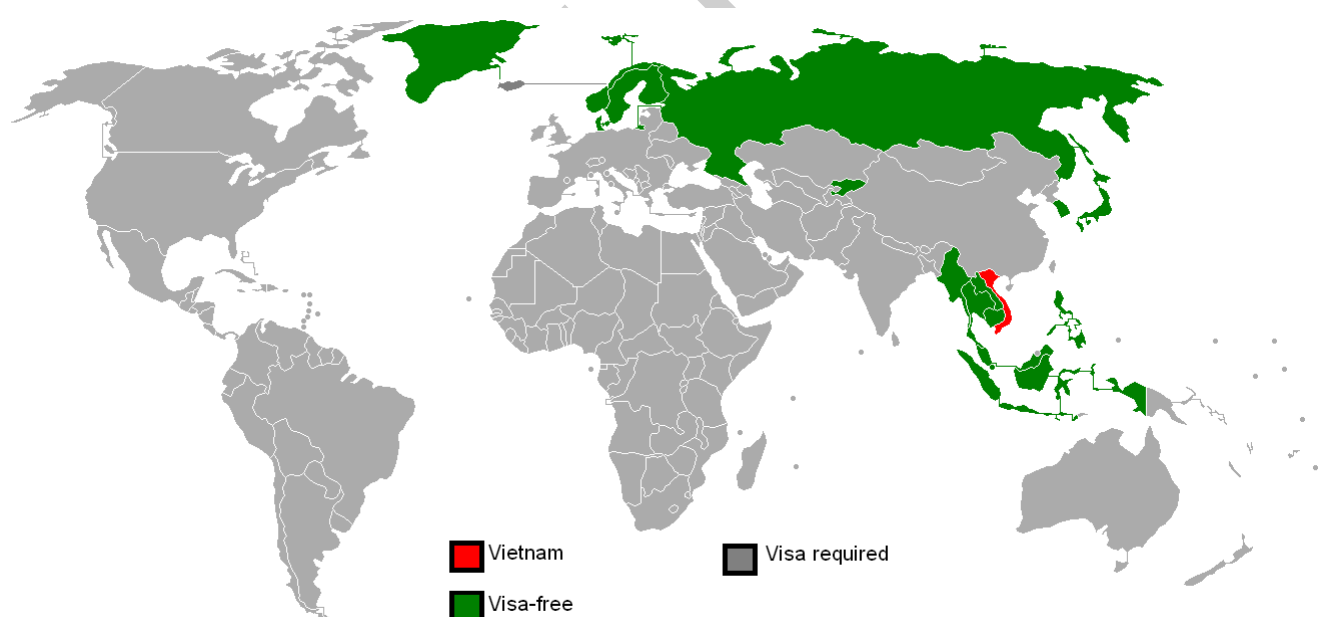
China remains the leading tourist inbound country, accounting for XX.XX% of total inbound tourists in 2014. The tourist volume from China increased from X million in 2013 to X million in 2014. However, the annual growth in inbound tourists from China has slowed down from XX.XX% in 2013 to XX.XX% in 2014. This can be attributed to the ongoing territorial dispute over the East Sea between Vietnam and China.

Table 1: Vietnam – Tourist Arrivals from Top 10 Countries (Thousand), 2010–2019

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
China	1,200	1,300	1,400	1,500	1,600	1,700	1,800	1,900	2,000	2,100
United States	100	110	120	130	140	150	160	170	180	190
France	80	85	90	95	100	105	110	115	120	125
Germany	70	75	80	85	90	95	100	105	110	115
United Kingdom	60	65	70	75	80	85	90	95	100	105
Italy	50	55	60	65	70	75	80	85	90	95
Spain	40	45	50	55	60	65	70	75	80	85
Japan	30	35	40	45	50	55	60	65	70	75
South Korea	20	25	30	35	40	45	50	55	60	65
Australia	10	12	14	16	18	20	22	24	26	28

Source: National Statistics Vietnam, TTICAnalysis

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Figure 3: Vietnam – Inbound Visa Policy, 2014


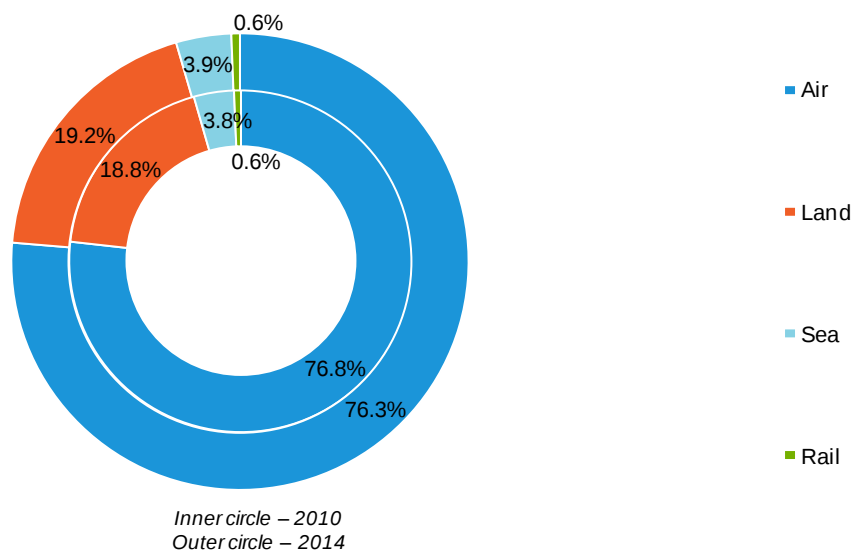
Source: TTIC Analysis

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4.1.3 Outbound tourism

The Vietnamese outbound market recorded steady growth during the historic period, with the total number of outbound trips growing from X million in 2010 to X million in 2014. The expansion in air transport capacity to key outbound destinations, emergence of LCCs, and a rise in disposable income levels supported this upward trend.

Figure 4: Vietnam – International Departures by Mode of Transport, 2010 vs.2014



Source: Tourism Australia, TTICAnalysis

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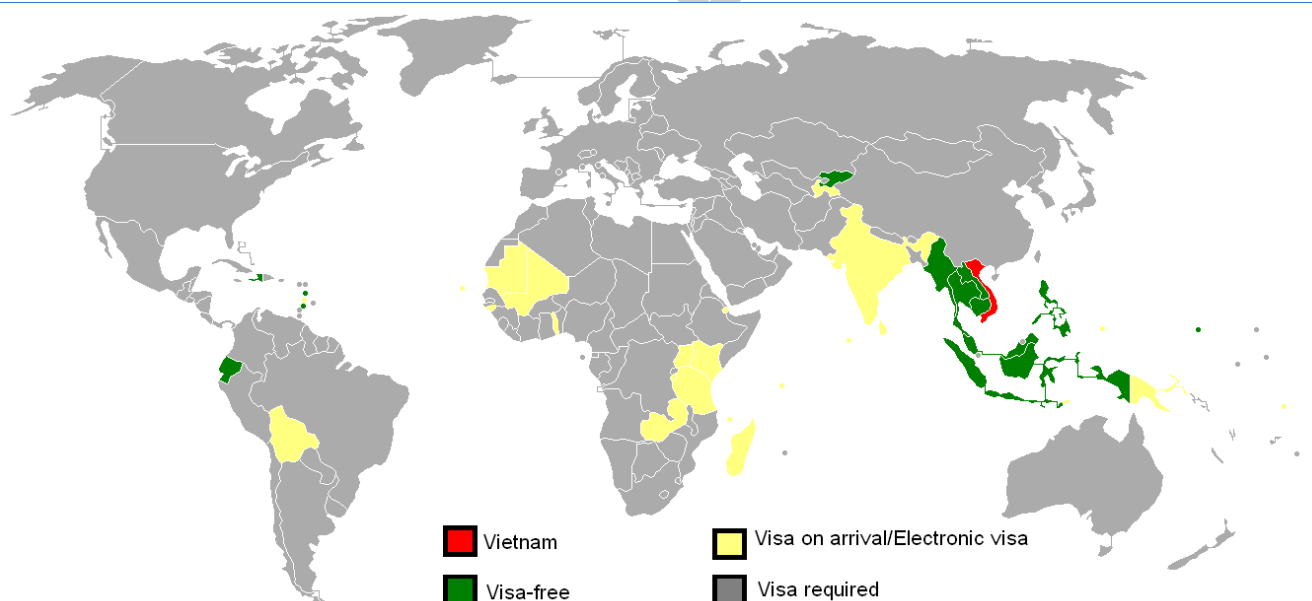
Cambodia was the primary tourist destination for Vietnam's outbound tourists, accounting for XX.XX% of total outbound trips in 2014. The number of outbound tourists to Cambodia increased from X in 2013 to X in 2014. The outbound growth is supported by rising levels of disposable income and the country's close proximity to Cambodia.

Table 2: Vietnam– Tourist Departures to Top 10 Countries (Thousand), 2010–2019

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019

Source: Tourism Australia, TTICAnalysis

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Figure 5: Vietnam – Outbound Visa Policy, 2014


Source: TTIC Analysis

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4.2 Methodology

TTIC's dedicated research and analysis teams consist of experienced professionals with industry backgrounds in marketing, market research, consulting, and advanced statistical expertise.

TTIC adheres to the Codes of Practice of the Market Research Society (www.mrs.org.uk) and the Society of Competitive Intelligence Professionals (www.scip.org).

All TTIC databases are continuously updated and revised.

All Travel and Tourism reports are created by following a comprehensive, four-stage methodology. This includes market study, research, analysis, and quality control.

1) Market Study

A. Standardization

Definitions are specified using recognized industry classifications. The same definition is used for every country. Annual average currency exchange rates are used for the latest completed year. These are then applied across both historical and forecast data to remove exchange rate fluctuations.

B. Internal Audit

- Review of in-house databases to gather existing data:
 - Historic market databases and reports
 - Company database

C. Trend monitoring

- Review of the latest Travel and Tourism companies, and industry trends

2) Research

A. Sources

- Collection of the latest market-specific data from a wide variety of industry sources:
 - Government statistics
 - Industry associations
 - Company filings
 - International organizations
 - Travel and tourism agencies

B. Expert opinion

- Collation of opinions taken from leading Travel and Tourism industry experts
- Analysis of third-party opinion and forecasts:
 - Broker reports
 - Media
 - Official government sources

C. Data consolidation and verification

- Consolidation of data and opinions to create historical datasets
- Creation of models to benchmark data across categories and geographies

3) Analysis

A. Market forecasts

- Feeding forecast data in to market models:
 - Macroeconomic indicators
 - Industry-specific drivers
- Analysis of Travel and Tourism industry database to identify trends:
 - Latest Travel and Tourism trends
 - Key drivers of the Travel and Tourism industry

B. Report writing

- Analysis of market data
- Discussion of company and industry trends and issues
- Review of financial deals, and Travel and Tourism trends

4) Quality Control

A. Templates

- Detailed process manuals
- Standardized report templates and accompanying style guides
- Complex forecasting tools to ensure that forecast methodologies are applied consistently
- Quality-control checklists

B. Quality control process

- Peer review
- Senior-level QC
- Random spot checks on data integrity
- Benchmark checks across databases
- Market data cross-checked for consistency with accumulated data from:
 - Company filings
 - Government sources

RELATED REPORTS

Travel and Tourism in the Russia to 2018

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