Travel and Tourism in Vietnam to 2019

Description: 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 that focused on promoting tourism during the national holidays contributed to the growth in domestic tourism. In 2014, Thua Thien Hue registered the largest annual growth of 8.1% in the number of domestic trips, driven by various discount offers on tour packages. The tourism industry of Thua Thien Hue also held 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 in the months of May and June, due to anti-Chinese riots in Vietnam in May 2014.

Key Findings
- The total number of domestic trips during the historic period increased from 28 million in 2010 to 37.5 million in 2014, driven by various stimulation programs launched by the VNAT such as 'Vietnamese people travel across Vietnam', which was launched in July 2014. Furthermore, the promotional campaigns are expected to increase the domestic tourist volume at a CAGR of 6.87% over the forecast period, particularly in coastal areas, islands, and mountains.
- Phu Quoc Island in southwest Vietnam has emerged as a popular tourist destination in 2014, driven by an increasing number of domestic flights (such as VietJet which launched a new flight from Phu Quoc to Hanoi in May 2014, a route that was previously only served by Vietnam Airlines), the introduction of new international air routes (such as Singapore and Cambodia), and upcoming luxury resorts (such as Vinepearl Resort). Moreover, the government of Vietnam declared Phu Quoc a visa-free zone in March 2014, to strengthen international tourist growth to the island.
- According to TTIC Analysis, VietJet's (an LCC) market share, in terms of number of passengers carried, increased from 10.4% in 2012 to 16% in 2013, while that of Vietnam Airlines (the flag carrier) decreased from 56.9% in 2012 to 55.2% in 2013. To compete with the national carrier, VietJet has been expanding its operations and introduced international destinations Singapore, Taiwan, and Hong Kong in 2014. Additionally, to promote its new flight services to Singapore, VietJet offered sharp price discounts on tickets in 2014.
- According to the World Economic Forum's Travel and Tourism Competitiveness Report 2013, Vietnam's road transport infrastructure (in terms of quality of roads) was ranked at 118 out of 140 countries. This ranking is quite poor when compared to other Southeast Asian countries such as Singapore (three), Hong Kong (eight), and Malaysia (27). Poor road quality limits the growth of the car rental market in the country.
- Many travel agencies in Vietnam are promoting tourism in the growing Russian and Japanese markets. In 2014, the VNAT conducted events such as 'Vietnam Culture Days in Japan' (in September 2014) and 'Vietnam Culture Day in Russia' (in June 2014) with the aim of strengthening tourism in these countries. Furthermore, the VNAT plans to launch a series of promotional programs in Moscow, Saint Petersburg, and Yaroslavl to attract Russian tourists from these cities. Travel agencies and operators are teaming up to expand tourism products for Russian tourists, particularly in new destinations such as Phu Yen, Quang Ngai, Binh Dinh, and Ninh Thuan.

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

Reasons to Buy
Make strategic business decisions using historic and forecast market data related to the Vietnamese Travel and Tourism sector

Understand the demand-side dynamics within the Vietnamese Travel and Tourism sector, along with key market trends and growth opportunities

Key Highlights
NA

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