Travel and Tourism in Vietnam
一、调研说明

中商情报网全新发布的《Travel and Tourism in Vietnam》主要依据国家统计局、国家发改委、商务部、中国海关、国务院发展研究中心、行业协会、工商、税务、海关、国内外相关刊物的基础信息以及行业研究单位等公布和提供的大量资料，结合深入的市场调研资料，由中商情报网的资深专家和研究人员的分析。首先，报告对本行业的特征及国内外市场环境进行描述，其次，对本行业的上下游产业链，市场供需状况及竞争格局等进行了细致的详尽剖析，接着报告中列出数家该行业的重点企业，并分析相关经营财务数据。最后，对该行业未来的发展前景，投资风险及投资策略给出科学的建议。本报告是行业生产、贸易、经销等企业在激烈的市场竞争中洞察市场先机，根据市场需求及时调整经营策略，为战略投资者选择恰当的投资时机和公司领导层做战略规划提供了准确的市场情报信息及科学的决策依据。

<table>
<thead>
<tr>
<th>报告名称</th>
<th>Travel and Tourism in Vietnam</th>
</tr>
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二、报告目录

【About this report】:

This market report provides market trend and market growth analysis of the Travel and Tourism industry in Vietnam. With this market report, you’ll be able to explore in detail the changing shape and potential of the industry. You will now be able to plan and build strategy on real industry data and projections.

The Travel and Tourism in Vietnam market research report includes:
§ Analysis of key supply-side and demand trends
§ Detailed segmentation
§Historic volumes and values, company and brand market shares
§Five year forecasts (of market share, market trends, market growth)
§Robust and transparent market research methodology, conducted in-country

Our market research reports answer questions such as:
§What is the market size of Travel and Tourism in Vietnam?
§What are the major brands in Vietnam?

Why buy this report?
§Gain competitive intelligence about market leaders
§Track key industry trends, opportunities and threats
§Inform your marketing, brand, strategy and market development, sales and supply functions

Each report is delivered with the following components:

Report: PDF and Word

Market statistics: Excel workbook

Sample Analysis

EXECUTIVE SUMMARY

Strong recovery after economic downturn

The travel and tourism market recorded a strong performance in 2010 as the impacts of economic downturn eased off. Number of inbound, outbound and domestic tourists all logged double-digit growth during the year. Many retailer services, such as airlines, accommodation and other travel retail services also saw much stronger growth compared to the previous year.

Low-cost was the buzz word

Although people started to travel again, cost remained the major concern for many. Economic downturn in 2008-2009 led to bonus cut-offs for many employees. Besides, double-digit high inflation in 2010 led to rapidly rising commodity prices, which further tightened people’s travel budgets. Thus, many chose to travel cheap. Low-cost airlines were strongly favoured compared to standard airlines. 4- and 5-star hotels also had to give discounts and promotions to maintain their occupancy rate.

2010 was the year of festivals

2010 saw the biggest festival ever organised in Vietnam, the celebration of Ha Noi’s 1,000th anniversary. The event drew lots of attention from domestic and inbound tourists alike. Even though the event organisation experienced some hiccups, it was generally considered a success, which helped to promot
The travel and tourism industry in Vietnam has seen significant growth in recent years. One of the key factors contributing to this growth has been the government’s strong support of state-owned companies. These companies have dominated the market for air transportation, car rentals, travel retail, and accommodation. Although there were many other festivals organized across the countries, which created lots of excitement and interest, especially from the domestic travellers.

State-owned companies lead the market

Vietnam’s travel and tourism industry is heavily controlled by the government. Strong government supported, state-owned companies continued to lead the market. Big players, such as Vietnam Airlines and SaigonTourist dominated air transportation, car rentals, travel retail, and accommodation. However, with more open policies in recent years, together with the rise in number of small and medium travel service operators, these leading positions could be threatened over the forecast period.

Strong growth expected for the future

With signs of recovery in 2010, the travel and tourism market is expected to see stronger growth over the forecast period. Rising disposable incomes and improving living standards will be strong contributing factors, as travelling become more affordable for more people. Better policies from the government will also help to attract more inbound tourists. Thus, double-digit growth is expected to be seen over the forecast period for the industry as a whole.

【Table of Contents】:

Travel And Tourism in Vietnam - Industry Overview

EXECUTIVE SUMMARY
Strong recovery after economic downturn
Low-cost was the buzz word
2010 was the year of festivals
State-owned companies lead the market
Strong growth expected for the future

KEY TRENDS AND DEVELOPMENTS
Economic recovery bolsters tourism’s growth
Big marketing efforts from the National Administration of Tourism
Legislative Environment – Waive of Visa application fees for tourists going on “Vietnam – Your Destination” program
Legislative environment: Tour guides to use new magnetic cards
Weak management hinders growth
More festivals to attract tourists
Budget hotels lose attractiveness to domestic travellers
Internet developments foster industry growth

**DEMAND FACTORS**
- Table 1 Leave Entitlement: Volume 2005-2010
- Table 2 Holiday Demographic Trends 2005-2010
- Table 3 Holiday Takers by Sex 2005-2010
- Table 4 Holiday Takers by Age 2005-2010
- Table 5 Seasonality of Trips 2005-2010

**BALANCE OF PAYMENTS**
- Table 6 Balance of Tourism Payments: Value 2005-2010

**MARKET INDICATORS**
- Table 7 Length of Domestic Trips: 2005-2010
- Table 8 Length of Outbound Departures: 2005-2010

**DEFINITIONS**
Tourism Flows
Tourism Receipts and Expenditure
Travel Accommodation
Transportation
Car Rental
Travel Retail
Travel retail online sales
Tourist Attractions
Casinos
Circuses
Health and Wellness
Internet Transactions
- Summary 1 Research Sources

**Travel And Tourism in Vietnam - Company Profiles**
*Cong ty du lich va tiep thi giao thong van tai (Vietravel) in Travel and Tourism (Vietnam)*

**STRATEGIC DIRECTION**
**KEY FACTS**
**COMPANY BACKGROUND**
**COMPETITIVE POSITIONING**
· Summary 3 Vietnam Travel & Marketing Transport Co Ltd (Vietravel): Competitive Position 2010

**Jetstar Pacific Airlines Joint Stock Aviation Co in Travel and Tourism (Vietnam)**

**STRATEGIC DIRECTION**

**KEY FACTS**

**COMPANY BACKGROUND**

**COMPETITIVE POSITIONING**

· Summary 5 Jetstar Pacific Airlines Joint Stock Aviation Co: Competitive Position 2010

**SaigonTourist Holding Co in Travel and Tourism (Vietnam)**

**STRATEGIC DIRECTION**

**KEY FACTS**

**COMPANY BACKGROUND**

**COMPETITIVE POSITIONING**

· Summary 7 SaigonTourist Holding Co: Competitive Position 2010

**Vietnam Airlines Corp in Travel and Tourism (Vietnam)**

**STRATEGIC DIRECTION**

**KEY FACTS**

**COMPANY BACKGROUND**

**COMPETITIVE POSITIONING**

· Summary 9 Vietnam Airlines Corp: Competitive Position 2010

**Car Rental in Vietnam - Category Analysis**

**HEADLINES**

**TRENDS**

· As there were an increasing number of tourists shifting from traveling on organised tour groups to free and easy or backpacking tours, they preferred car rental. There were around 2,400 car rental operators in the market by the end of 2010. Fleet sizes also saw an increase, making a total of 127,000 cars in the market.

**COMPETITIVE LANDSCAPE**

· SaigonTourist Holding Corporate continued to be the leader in car rental in 2010 with total sales of VND484 billion, an increase of 36% on 2009. Mai Linh Co took second place with total sales of VND 229.7 billion.

**PROSPECTS**

· Over the forecast period, growth is expected to be stable. However, the category is not expected to see any major hike in growth due to the fact that many people are still not used to driving themselves. On the other hand, growth is supported by the rising number of domestic and inbound tourists, as well a
s the development of the land transportation infrastructure.

**CATEGORY DATA**

- Table 9 Car Rental Sales by Category and Location: Value 2005-2010
- Table 10 Car Rental Sales: Internet Transaction Value 2005-2010
- Table 11 Structure of Car Rental Market: 2005-2010
- Table 12 Average Car Rental Duration by Category 2005-2010
- Table 13 Car Rental Time of Booking: % Breakdown 2005-2010
- Table 14 Car Rental Market Shares 2006-2010
- Table 15 Car Rental Brands by Key Performance Indicators 2010
- Table 16 Forecast Car Rental Sales by Category and Location: Value 2010-2015
- Table 17 Forecast Car Rental Sales by Category: Internet Transaction Value 2010-2015

**Health and Wellness Tourism in Vietnam - Category Analysis**

**HEADLINES**

**TRENDS**

- Health and wellness tourism in Vietnam is still in its nascent stage. In 2010, spas were the only component of health and wellness tourism offered in Vietnam. It saw high growth of 26%, mostly because of its emergence from a low base.

**PROSPECTS**

- Spas will still account for most of the revenue of health and wellness tourism. It is expected that health and wellness tourism will generate about VND8.5 trillion in 2015, growing at a CAGR of 14% in constant value terms over the forecast period. Vietnamese tourists will be familiar with spa services, but most of the revenue from health and wellness tourism will still come from international tourists.

**CATEGORY DATA**

- Table 18 Number of Hotel/Resort Spas: Units 2005-2010
- Table 19 Health & Wellness Tourism Sales by Category: Value 2005-2010
- Table 20 Spa Consumer Markets: Domestic Tourism 2005-2010
- Table 21 Spa Consumer Markets: Arrivals 2005-2010
- Table 22 Forecast Health & Wellness Tourism Sales by Category: Value 2010-2015

**Tourism Flows Domestic in Vietnam - Category Analysis**

**HEADLINES**

**TRENDS**

- Overall domestic trips increased by 16% from 2009. Ha Noi and Ho Chi Minh city were still the most popular destinations in 2010; each location received about six million trips. However, robust growth was mainly contributed by emerging destinations, such as Hue and Quang Nam in central Vietnam, w
high observed growth of 10% and 15% in number of trips accordingly.

DESTINATIONS

MODE OF TRANSPORT

LEISURE

BUSINESS

DOMESTIC TOURIST EXPENDITURE

PROSPECTS

· Growth of domestic travel, though it cannot enjoy the extraordinary high growth seen in 2010, is expected to grow at a healthy CAGR of 12% over the forecast period.

CATEGORY DATA

· Table 23 Domestic Tourism Travel by Destination: 2005-2010
· Table 24 Domestic Tourism Travel by Purpose of Visit and by Mode of Transport: 2005-2010
· Table 25 Domestic Tourist Expenditure: Value: 2005-2010
· Table 26 Method of Payments for Domestic Tourism Spending: % Breakdown 2005-2010
· Table 27 Forecast Domestic Tourism Travel by Purpose of Visit and by Mode of Transport: 2010-2015
· Table 28 Forecast Domestic Tourist Expenditure: Value: 2010-2015

Tourism Flows Inbound in Vietnam - Category Analysis

HEADLINES

TRENDS

· During Q1 2010, Vietnam tourism was still affected by global recession. People cut back on traveling due to their decrease in 2009 bonus. However, from Q2 2010 and thereafter, tourists started to come back, making the overall number of arrivals increased by 19% from 2010.

COUNTRY OF ORIGIN

LEISURE

BUSINESS

MODE OF TRANSPORT

CITY ARRIVALS

INCOMING TOURIST RECEIPTS BY COUNTRY

PROSPECTS

· Arrivals to Vietnam is expected to grow at a CAGR of 5% during the forecast period. Continuous advertising and promotional efforts from the government will bolster growth. Improvements in infrastructure and tourism services in the country are also expected to draw more returning tourists.

CATEGORY DATA
· Table 29 Arrivals by Country of Origin: 2005-2010
· Table 30 Leisure Arrivals by Type 2005-2010
· Table 31 Business Arrivals: MICE Penetration 2005-2010
· Table 32 Arrivals by Mode of Transport: 2005-2010
· Table 33 Arrivals by Purpose of Visit: 2005-2010
· Table 34 Incoming Tourist Receipts by Country: Value 2005-2010
· Table 35 Tourism Expenditure by Category: Value 2005-2010
· Table 36 Method of Payments for Incoming Tourist Receipts: % Breakdown 2005-2010
· Table 37 Forecast Arrivals by Country of Origin: 2010-2015
· Table 38 Forecast Arrivals by Mode of Transport: 2010-2015
· Table 39 Forecast Arrivals by Purpose of Visit: 2010-2015
· Table 40 Forecast Incoming Tourist Receipts by Country: Value 2010-2015
· Table 41 International Arrivals by City 2007-2010

Tourism Flows Outbound in Vietnam - Category Analysis

HEADLINES

TRENDS
· As there was little impact of the global financial crisis on Vietnam’s economy, the number of outbound tourists increased by 17% from 2009. Growth was fostered by two main reasons. Firstly, there were groups of people who already had high incomes and became regular travellers. Secondly, as the economy improved, people had more money and were willing to spend on travelling abroad. Moreover, with the growth of low cost carriers, flights to nearby countries such as Singapore or Thailand or Malaysia are as cheap as flights between Ha Noi and Ho Chi Minh City, thus, more people chose to travel abroad.

DESTINATIONS

LEISURE

BUSINESS

MODE OF TRANSPORT

OUTGOING TOURIST EXPENDITURE BY COUNTRY

PROSPECTS
· Over the forecast period, the number of Vietnamese people travelling abroad will continue to increase, mainly among middle-class and upper-class families. Their most popular destinations are still neighbouring countries, such as China, Singapore, and Thailand. Though, as people have more disposable income, they will switch to other further and more expensive countries, such as Japan, South Korea or European countries.
 CATEGORY DATA

· Table 42 Departures by Destination: 2005-2010
· Table 43 Leisure Departures by Type 2005-2010
· Table 44 Business Departures: MICE Penetration % Breakdown 2005-2010
· Table 45 Departures by Mode of Transport: 2005-2010
· Table 46 Departures by Purpose of Visit: 2005-2010
· Table 47 Outgoing Tourist Expenditure by Country: Value 2005-2010
· Table 48 Outgoing Tourist Expenditure by Category: Value 2005-2010
· Table 49 Method of Payments for Outgoing Tourism Spending: % Breakdown 2005-2010
· Table 50 Forecast Departures by Destination: 2010-2015
· Table 51 Forecast Departures by Mode of Transport: 2010-2015
· Table 52 Forecast Departures by Purpose of Visit: 2010-2015
· Table 53 Forecast Outgoing Tourist Expenditure by Country: Value 2010-2015

 Tourist Attractions in Vietnam - Category Analysis

 HEADLINES

 TRENDS

· Vietnam is rich in cultural sites and natural landscapes. There were six UNESCO World Heritage Sites in the country by 2010, one of which was added during that year itself. These were also the major attractions for inbound and domestic tourists, such as Ha Long Bay, Phong Nha – Ke Bang National Park, Hoi An Ancient Town and the Complex of Hue Monuments. As such, historic buildings/sites and natural parks/areas of natural beauty accounted for nearly 95% of revenue.

 PROSPECTS

· National parks/areas of natural beauty and historic sites will remain the favourite destinations for both domestic and international tourists during the forecast period. These will be boosted by both government marketing campaigns as well as promotions from service providers and industry players. The national flag carrier, Vietnam Airlines, also continuously advertises these attractions to foreign tourists.

 CATEGORY DATA

· Table 54 Tourist Attractions Sales by Category: Value 2005-2010
· Table 55 Tourist Attractions Visitors by Category: 2005-2010
· Table 56 Leading Tourist Attractions by Visitors 2005-2010
· Table 57 Forecast Tourist Attractions Sales by Category: Value 2010-2015
· Table 58 Forecast Tourist Attractions Visitors by Category: 2010-2015

 Transportation in Vietnam - Category Analysis

 HEADLINES
TRENDS
· As the economy recovers from the crisis, tourism in Vietnam experienced high growth. It led to strong double-digit growth in transportation. Air transportation also recorded double-digit growth in 2010. The year saw the disappearance of Indochina Airlines, and the emergence of Air Mekong, which had its first flight in October 2010. Jetstar Pacific remained the only low-cost carrier in the market and gained more popularity rapidly.

AIRCRAFT

COMPETITIVE LANDSCAPE
· Vietnam Airlines continued to be the leading airline in Vietnam. Despite its higher priced air tickets, compared to Jetstar Pacific, Vietnam Airlines had the advantage of its wider networks of flying routes with 44 international and domestic destinations. It also had a larger fleet size, with better service and facilities than Jetstar Pacific.

PROSPECTS
· As the Vietnam tourism market is expected to see stronger growth during the forecast period in terms of number of tourists, the transportation industry will also get a boost. This results in a constant value CAGR of 9% over the forecast period.

CATEGORY DATA
· Table 59 Transportation Sales by Category: Value 2005-2010
· Table 60 Transportation Sales: Internet Transaction Value 2005-2010
· Table 61 Airline Capacity: 2005-2010
· Table 62 Airline Utilisation: 2005-2010
· Table 63 Airline Passengers Carried by Distance: 2005-2010
· Table 64 Airline Market Shares 2006-2010
· Table 65 Airline Brands by Key Performance Indicators 2010
· Table 66 Forecast Transportation Sales by Category: Value 2010-2015
· Table 67 Forecast Transportation Sales: Internet Transaction Value 2010-2015

Travel Accommodation in Vietnam - Category Analysis

HEADLINES

TRENDS
· As the global economy’s outlook was better in 2010, international tourists were coming back to Vietnam. Vietnamese tourists were also more willing to spend their money to travel. Tour agents and hotels, especially the luxury ones, tried to reduce their prices and therefore, hotel rooms were almost filled up. The occupancy rate of travel accommodation in Vietnam was among the highest; average about 80-85%.
HOTELS

COMPETITIVE LANDSCAPE

· SaigonTourist Holding Co continues to be the leading accommodation provider in 2010. The company owned a total of 56 hotels nationwide. The company was trying to establish its presence in the global market by considering buying five luxury hotels in the US, Japan, and other countries. In terms of domestic tourism, the company made great efforts to develop MICE tourism and advertise its MICE services to other countries.

PROSPECTS

· As the country hopes to target more MICE tourists to come to Vietnam, more luxury hotels will need to be built. For example, Accor Vietnam will develop 12 more hotels and resorts, with more than 2,000 rooms, which are expected to be launched in 2013. It is expected that there will be a race for business among luxury hotels.

CATEGORY DATA

· Table 68 Travel Accommodation Sales by Category: Value 2005-2010
· Table 69 Travel Accommodation Outlets by Category: Units 2005-2010
· Table 70 Travel Accommodation by Broad Category: Number of Rooms 2005-2010
· Table 71 Regional Hotel Parameters 2010
· Table 72 Travel Accommodation Sales: Internet Transaction Value 2005-2010
· Table 73 Hotel National Brand Owners by Market Share 2006-2010
· Table 74 Hotel Brands by Key Performance Indicators 2010
· Table 75 Forecast Travel Accommodation Sales by Category: Value 2010-2015
· Table 76 Forecast Travel Accommodation Outlets by Category: Units 2010-2015
· Table 77 Forecast Travel Accommodation Sales: Internet Transaction Value 2010-2015

Travel Retail in Vietnam - Category Analysis

HEADLINES

TRENDS

· The economic crisis’ negative effect died out, and tourists started to come back to Vietnam. Local tourists were also more willing to travel. Therefore, travel retail sales recorded much stronger growth than the previous year.

LEISURE TRAVEL

BUSINESS TRAVEL

ONLINE TRAVEL

COMPETITIVE LANDSCAPE

· SaigonTourist continued to lead travel retail in 2010. The company has hotels and resorts, including
five 5-star hotels located in Ho Chi Minh City and many other luxury hotels all over the country. It also developed tourist zones such as Can Gio, Binh Chau – Ho Coc, etc. for ecology tours. With its expertise and facilities, SaigonTourist was the leader in both leisure and business travel.

PROSPECTS

· Travel retail is expected to see stable growth over the forecast period. People will continue to favour tour packages when they want to explore places that they are not familiar with.

CATEGORY DATA

· Table 78 Travel Retail Outlets by Category: Units 2005-2010
· Table 79 Travel Retail Products Sales: Value 2005-2010
· Table 80 Corporate Business Travel Retail Products Sales: Value 2005-2010
· Table 81 Leisure Travel Retail Products Sales: Value 2005-2010
· Table 82 Travel Retail Online Sales by Category: Internet Transaction Value 2005-2010
· Table 83 Travel Retail Online Sales by Category: Internet Transaction Value 2005-2010
· Table 84 Travel Retail Products Market Shares 2006-2010
· Table 85 Travel Retail Products Brands by Key Performance Indicators 2010
· Table 86 Forecast Travel Retail Outlets by Category: Units 2010-2015
· Table 87 Forecast Travel Retail Products Sales: Value 2010-2015
· Table 88 Forecast Corporate Business Travel Retail Products Sales: Value 2010-2015
· Table 89 Forecast Leisure Travel Retail Products Sales: Value 2010-2015
· Table 90 Forecast Travel Retail Online Sales by Category: Internet Transaction Value 2010-2015

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目前公司与国家相关数据部门、行业协会等权威机构建立了良好的合作关系，同时与多家国际著名咨询服务结构建立了战略伙伴关系。并与国内外众多基金公司、证券公司、PE、VC机构、律师事务所、会计师事务所结成战略合作伙伴。公司还拥有近10多年来对各行业追踪研究的海量信息数据积累。建立了多种海量数据库，分为：宏观经济数据库、行业月度财务数据库，产品产量数据库，产业进出口数据库，企业财务数据库等。并将这些数据及时更新与核实。可以保证数据的全面、权威、公正、客观。

多年来，中商情报网为上万家企业事业提供了专业的投资咨询、信息咨询及研究报告服务，并得到客户的广泛认可；我们坚信您也可以从中商情报网提供的资讯产品中洞察商业潜在的价值和风险，提高您的决策支持效率。

中商情报网管理团队和中商情报网的战略合伙人一直致力于为客户提供高价值的企业咨询服务解决方案。

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<td>竞争情况调研</td>
<td>竞争对手调研及监测、竞争策略研究、竞争环境研究、监测、企业战略研究、市场营销/促销策略分析、合作伙</td>
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- □ 银行
- □ 邮局
- □ 支票
- □ 其他

定购数量：____份
请选择报告版本：

1. □ PDF电子版 0元/份
2. □ 印刷版 0元/份
3. □ PDF电子版+印刷版 0元/份

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<tr>
<th>总计金额</th>
<th>____万 ____仟 ____佰 ____拾 ____元（小写：____元）</th>
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<td>预计付款日期</td>
<td>_____年 _____月 _____日</td>
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<table>
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<tr>
<th>指定账号</th>
<th>开户行：中国工商银行深圳黄贝支行</th>
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<tbody>
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<td>开户名：深圳中商智汇咨询服务有限公司</td>
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<td>备注：此账户可开具增值税普通发票</td>
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<td>开户名：中商智汇（北京）咨询有限公司</td>
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款到后，发票随后寄发。此账号为唯一指定账号。

<table>
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<tr>
<th>联系方法</th>
<th>电话：400-666-1917    传真：（0755）25407715</th>
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<tbody>
<tr>
<td>深圳地址：深圳市福田区红荔路1001号银盛大厦7层 邮编：518000</td>
<td></td>
</tr>
<tr>
<td>北京地址：北京市右安门外大街99号国内贸易工程设计研究院5层501室 邮编：100069</td>
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<tr>
<td>网址：<a href="http://www.askci.com">http://www.askci.com</a></td>
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备注：请将订阅信息填好后，传真至我中心客服部，款到后发票随后寄发。