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SAVILLS REPORT ON NHA TRANG PROPERTY MARKET, MAY 2013

Hotel

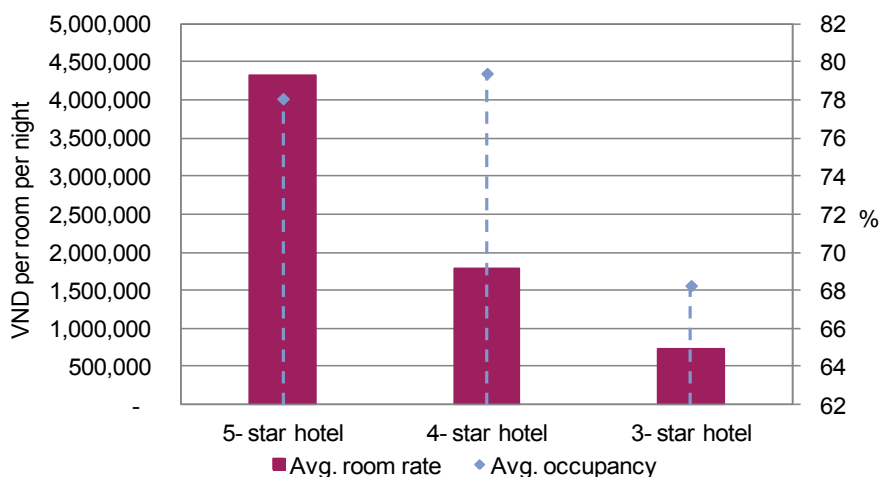
As of Q1/2013, the total stock of 3- to 5-star hotels in Nha Trang was more than 4,800 rooms, increasing 3% quarter-on-quarter (QoQ).

In spite of the entrance of new hotels, the whole market performed well this quarter. The overall occupancy increased 3 ppts to 73% QoQ and the average room rate was VND 1,820,000/ room/ night, up 7% QoQ.

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Hotel performance, Q1/2013



Source: Savills Research & Consultancy

In Q1/2013, Khanh Hoa welcomed more than 670,000 visitors, increasing by 22% YoY. In which, the total number of domestic visitors was over 500,000, up 20% YoY whilst international visitors had a strong increase of 30% YoY.

There are 25 future hotel projects providing more than 4,100 rooms to the 3- to 5-star hotel markets. In which, six hotels with more than 900 rooms are expected to come online in 2013. This will increase competition within Nha Trang's hotel market.

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