

RESEARCH STUDY

# Vietnam Dental Tourism Market Analysis

*Demand Patterns, Geographic Distribution, and International Access Corridors  
(2025–2026)*

---

Published by **Medical Tourism Corporation**

Dallas, Texas, USA | [medicaltourismco.com](http://medicaltourismco.com)

February 2026

## Executive Summary

This research study examines the emerging landscape of dental tourism in Vietnam, with particular focus on international patient demand originating from the United States, United Kingdom, and Australia. The study consolidates data from official Vietnamese tourism authorities, dental market research firms, independent expat census sources, and Google Trends analysis spanning 2024 through early 2026.

Vietnam has rapidly ascended as a primary destination for dental tourism across the Asia-Pacific region. As of 2025, the country receives an estimated 79,000 or more international dental tourists annually across three key and six emerging cities. This figure represents a fraction of the total inbound foreign visitor count, which surpassed 21 million in 2025.

Three primary drivers underpin this growth: escalating dental procedure costs in the patient's home country; material improvements in the clinical quality and patient-experience infrastructure of Vietnamese dental providers; and deliberate Vietnamese government policy designating medical and dental tourism as a strategic national priority.

Ho Chi Minh City and Hanoi collectively constitute the dominant centers of dental tourism activity. Da Nang and Hoi An represent the fastest-growing secondary tier. Phu Quoc is an emerging, opportunistic market driven by leisure tourism overlap.

---

## 1. Research Objectives and Methodology

### 1.1 Objectives

This study was designed to address four core research questions:

- What is the current scale and geographic distribution of dental tourism across Vietnam's principal cities?
- Which international source markets generate the greatest demand, and through which search and travel channels?
- What structural factors — including flight connectivity, expat population, and governmental policy — are shaping demand trajectories?
- Which Vietnamese cities present the most compelling market opportunity for international dental service providers over the 2026–2028 period?

### 1.2 Data Sources

Data was compiled from a combination of primary and secondary sources, including but not limited to:

- Vietnam National Administration of Tourism (vietnamtourism.gov.vn) — official monthly and annual inbound tourist statistics
- Vietnam News, VietnamPlus, and Vietnam Briefing — supplementary reporting on destination-level visitor figures

- Ken Research, TechSci Research, and IMARC Group — third-party dental and medical tourism market size estimates
- William Russell Expat Guides and Vietnam Ministry of Labour, Invalids and Social Affairs — expat population estimates by city
- Google Trends — keyword demand tracking for dental search queries across Australia, USA, and UK from April 2025 onward
- Airline schedule verification via Vietnam Airlines, Vietjet, Jetstar, and Qantas published timetables

### 1.3 Scope and Limitations

This study covers nine Vietnamese cities: Ho Chi Minh City, Hanoi, Da Nang, Hoi An, Nha Trang, Phu Quoc, Hai Phong, Can Tho, and Hue. Dental tourist arrival figures represent the best available estimates from published market research and cross-referenced against foreign visitor proportions; they are not derived from official Vietnamese government dental tourism tracking, which does not yet exist as a discrete statistical category. Google Trends data provides directional demand signals and relative comparisons between markets but does not constitute absolute volume counts.

## 2. City-Level Market Analysis

### 2.1 Comparative Data Overview

The following table presents the primary quantitative and qualitative indicators for each city studied, encompassing annual foreign tourist arrivals, estimated dental tourist volume, primary international source countries, registered expatriate population, number of active dental clinics, and directional Google search demand from Australian and American markets.

City	Foreign Tourists (Annual)	Dental Tourists (Annual)	Foreign Tourists Origin	Expat Population	Dental Clinics	Online Search (AU)	Online Search (USA)	Online Search (UK)
Ho Chi Minh City	8 million+	40,000+	China, S.Korea, USA, AU, Malaysia	60,000+	1,200+	High	Medium	Low
Hanoi	7.5 million+	20,000+	AU, China, S.Korea, Taiwan, Japan, UK	25,000+	750+	Medium	Low	Medium
Da Nang	5 million+	10,000+	S.Korea, India, China, Thailand, AU	8,000+	300+	Medium	Medium	Low
Hoi An	0.2 million+	1,000+	S.Korea, AU, USA, UK, France	800+	30+	Low	Low	Low
Nha Trang	1.25 million+	5,000+	Russia, Kazakhstan, China, S.Korea	4,000+	100+	Low	Low	Low

City	Foreign Tourists (Annual)	Dental Tourists (Annual)	Foreign Tourists Origin	Expat Population	Dental Clinics	Online Search (AU)	Online Search (USA)	Online Search (UK)
Phu Quoc	1 million+	2,000+	S.Korea, Russia, Taiwan, Poland, AU	1,500+	30+	Low	Low	Low
Hai Phong	0.3 million+	<1,000	S.Korea, Japan, China	2,000+	190+	Low	Low	Low
Can Tho	0.3 million+	<1,500	UK, France, USA, AU, Cambodia	300+	150+	Low	Low	Low
Hue	1.5 million+	<800	France, Germany, UK, Thailand, AU	300+	50+	Low	Low	Low

Table 1: Vietnam Dental Tourism City Comparison Matrix (2025–2026). Sources: Vietnam National Administration of Tourism, Ken Research, TechSci Research, IMARC Group, Online search trends.

## 2.2 Tier One Markets: Ho Chi Minh City and Hanoi

### Ho Chi Minh City

Ho Chi Minh City is Vietnam's unambiguous leader in dental tourism by every measured indicator. With over eight million annual foreign visitors and an estimated 40,000 international dental patients — the highest of any Vietnamese city — it operates at a scale that no other domestic destination approaches. Its 1,200-plus registered dental clinics represent a density of provision capable of absorbing significant further demand without material capacity constraints.

MTC's online search trends analysis classifies Australian market demand for dental search terms associated with Ho Chi Minh City as 'High'. United States market demand is categorised as 'Medium', reflecting an earlier stage of market penetration for American patients, but growing rapidly since April 2025. Direct daily flight services from Sydney, Melbourne, Brisbane, and Perth eliminate one of the traditional barriers to consideration for Australian travelers.

The city's expat population of more than 60,000 serves a dual function: as a direct consumer base for dental services and as an informal word-of-mouth network that propagates awareness of local clinical quality among visiting friends and family.

### Hanoi

Vietnam's capital city attracts more than 7.5 million international visitors annually and hosts an estimated 20,000 dental tourists — approximately half the volume of Ho Chi Minh City. Its 750-plus clinics and 25,000-strong expatriate community constitute a significant secondary market. Australian search demand is categorised as 'Medium' per MTC online trends, and United States demand is categorised as 'Low,' indicating that Hanoi remains underrepresented in Anglophone awareness relative to its clinical capacity.

Direct flights from Sydney and Melbourne — operated by Vietnam Airlines four times weekly — provide practical connectivity for Australian patients. The city's historical and cultural profile may further support combined dental-tourism itineraries, a behavioral pattern increasingly observed among Australian travelers.

## 2.3 Tier Two Markets: Da Nang and Hoi An

### Da Nang

Da Nang presents a compelling emerging market profile. With five million foreign visitors annually and an estimated 10,000 dental tourists, it is the third-largest dental tourism destination in Vietnam.

Both Australian and American online search trends data register 'Medium' demand levels — a stronger relative position than the absolute visitor figures might suggest — indicating that demand awareness is growing ahead of actual patient conversion rates.

The city's infrastructure development trajectory, coastal resort positioning, and proximity to Hoi An (a UNESCO World Heritage site that generates significant leisure tourist footfall) collectively position it as a natural candidate for itinerary bundling by internationally mobile patients.

### Hoi An

Hoi An presents an asymmetric profile: a small registered expat population of under 1,000, only 30-plus dental clinics, and an estimated 1,000 dental tourists per year — yet it attracts a sophisticated international visitor mix including Australian, American, British, and French nationals. Dental search demand from Australia registers as 'Low' but measurable. Its proximity to Da Nang Airport (the shared aviation gateway for both cities) means it effectively operates as an extension of the Da Nang dental corridor for patients willing to combine leisure and treatment across the two locations.

## 2.4 Emerging and Niche Markets

### Nha Trang

Nha Trang attracts 1.25 million foreign visitors annually, with an estimated 5,000 dental tourists. Its 100-plus clinics operate within a tourism ecosystem that remains primarily resort-focused. Online search trends data for this market was insufficient to yield conclusions, suggesting limited awareness penetration in English-speaking source countries at present.

### Phu Quoc

Phu Quoc represents a speculative but strategically interesting case. The island's one million annual visitors and 1,500-strong expat population support only 30-plus dental clinics and an estimated 2,000 dental tourists — figures that suggest opportunistic, walk-in patient behavior rather than planned dental travel. Its growing Australian and South Korean visitor base, combined with increasing flight connectivity, may support organic dental tourism growth without dedicated infrastructure investment.

## Hai Phong, Can Tho, and Hue

These three cities represent nascent or peripheral dental tourism markets. Hai Phong, as an industrial port city, draws largely regional visitors from South Korea, Japan, and China. Can Tho's visitor profile includes British, French, American, and Australian nationals, a potentially underserved Anglophone market, but its 300-plus expat population and 150 clinics suggest a market still in the awareness-building phase. Hue attracts a culturally engaged European and Australian visitor segment with an estimated fewer than 800 dental tourists per year.

## 3. Digital Demand Analysis: Online Search Trends

### 3.1 Summary of Key Findings

Online search trends data was analyzed across multiple keyword clusters — including 'dental [city],' 'dentist [city],' 'dental implants [city],' and 'dental clinic [city]' — for Australian, American, and British source markets. The findings are summarized in the table below.

Market / Category	Key Finding
USA Market	Search volume for 'dental implants Vietnam' more than doubled since April 1, 2025
Australian Market	Year-on-year growth consistently exceeds 150% across all tracked dental keywords
UK Market	Demand concentrated in summer months, peaking in June — consistent with leisure travel windows
Combined Keywords	'Dental clinic Vietnam', 'dentist Vietnam', 'dental implants Vietnam' all growing in USA, UK, Australia
Geographic Hotspots	Ho Chi Minh City and Hanoi dominate search intent; Da Nang and Hoi An accelerating; Phu Quoc emerging

Table 2: Online Search Trends Analysis Summary — English-Speaking Source Markets (April 2025–February 2026).

### 3.2 United States Market

The most significant recent development in global dental tourism demand for Vietnam has been the acceleration of American search interest. Since April 1, 2025, search volume for the term 'dental implants Vietnam' in the United States more than doubled — a rate of growth that is not consistent with gradual organic awareness-building but instead suggests an inflection point driven by specific catalysts, likely including media coverage, social media virality, or coordinated content campaigns by Vietnamese dental providers targeting the American market.

Given that the USA market still registers 'Medium' or 'Low' in absolute demand indices relative to Australian market benchmarks, there remains substantial headroom for continued growth. The geographic distance (16 hours from San Francisco to Ho Chi Minh City) represents a friction point that has historically dampened conversion, but the cost differential between American and Vietnamese

dental implant pricing — which can reach multiples of two to four times — appears sufficient to motivate an expanding cohort of American patients to overcome logistical hesitation.

Vietnam is unlikely to become a major dental tourism destination for Americans and Canadians, given the proximity of Central and South American alternatives.

### 3.3 Australian Market

Australia is the most mature and highest-volume Anglophone source market for Vietnamese dental tourism as of 2026. Consistent year-on-year demand growth exceeding 150% across all tracked keyword clusters reflects an established behavioral norm rather than an emerging trend. Multiple structural factors reinforce this trajectory: short flight durations (seven to ten hours), high domestic dental costs relative to Vietnamese pricing, daily direct flight availability across four Australian gateway cities, and an established Vietnamese diaspora community in Australia that functions as both a referral network and a trust signal.

Ho Chi Minh City registers the highest Australian demand index (170-plus), followed by Da Nang and Hanoi at broadly similar medium-level indices (90-plus). This pattern suggests that Australian patients are not exclusively city-agnostic in their search behavior — they demonstrate geographic preferences that align with tourism familiarity and flight accessibility.

While very attractive, Vietnam faces strong competition from primary tourism destinations for Australians and New Zealanders, such as Bali, the Philippines, Malaysia, Indonesia, and Thailand.

### 3.4 United Kingdom Market

The UK market exhibits a structurally distinctive demand pattern: search interest is concentrated in summer months, with June representing the annual peak. This seasonal concentration is consistent with behavior in which dental travel is incorporated into annual leave or holiday periods — a pattern also observed in other medical tourism corridors. UK-to-Vietnam flight duration is approximately 12 hours (London to Hanoi or Ho Chi Minh City via Vietnam Airlines), which places it at a logistical threshold comparable to other established medical tourism routes from the UK to India or Thailand.

The implication for market development strategy is significant: UK patient acquisition should be time-sensitive, front-loading content and promotional activity in March through May to capture decision-making windows ahead of the June peak booking period.

Turkey, Hungary, Poland, Spain, Croatia and Romania are the primary destinations for UK and Ireland residents seeking dental tourism.

---

## 4. Flight Connectivity and Access Infrastructure

### 4.1 International Direct Flight Routes

The following table documents confirmed direct flight routes between key Anglophone source markets and Vietnamese gateway cities, including flight duration and carrier information as of early 2026.

Connectivity data is a material factor in patient decision-making and directly correlates with destination preference patterns observed in Google Trends analysis.

Origin Country	Departure City	Destination	Duration	Airlines & Frequency
UK	London	Hanoi	~12 hrs	Vietnam Airlines (3 flights/week)
UK	London	Ho Chi Minh City	~12 hrs	Vietnam Airlines (2 flights/week)
USA	San Francisco	Ho Chi Minh City	~16 hrs	Vietnam Airlines (4 flights/week)
Australia	Sydney	Hanoi	~10 hrs	Vietnam Airlines (4 flights/week)
Australia	Sydney	Ho Chi Minh City	~9 hrs	Vietjet, Vietnam Airlines, Jetstar/Qantas (daily)
Australia	Melbourne	Hanoi	~9 hrs	Vietnam Airlines (4 flights/week)
Australia	Melbourne	Ho Chi Minh City	~9 hrs	Vietjet, Vietnam Airlines, Jetstar/Qantas (daily)
Australia	Perth	Ho Chi Minh City	~7 hrs	Vietjet, Vietnam Airlines (daily except Wed)
Australia	Brisbane	Ho Chi Minh City	~9 hrs	Vietjet (daily except Sun & Tue)

Table 3: International Direct Flight Connectivity to Vietnam — Key Anglophone Source Markets (2026). Sources: Vietnam Airlines, Vietjet, Jetstar, Qantas published schedules. The schedules and frequency of flights may change.

## 4.2 Connectivity Implications for Market Strategy

Australia holds an unambiguous advantage in flight connectivity relative to the United States and United Kingdom. Daily services from four major Australian cities — Sydney, Melbourne, Brisbane, and Perth — to Ho Chi Minh City, operated by multiple carriers including Vietjet, Vietnam Airlines, and the Jetstar/Qantas group, eliminate the scheduling friction that can deter planned medical travel. The shortest route — Perth to Ho Chi Minh City at approximately seven hours — places Vietnam within a comparable travel distance to other established Australian medical tourism destinations.

The United States is currently served by a single confirmed direct route: San Francisco to Ho Chi Minh City, operated by Vietnam Airlines four times weekly. The 16-hour flight duration represents a meaningful deterrent relative to Australian routes, and the limited frequency of departures constrains treatment scheduling flexibility for American patients. Expansion of US gateway cities and carrier options would be expected to materially accelerate American patient volume.

UK connectivity is limited to London as the sole departure point, with three weekly Hanoi services and two weekly Ho Chi Minh City services via Vietnam Airlines. While functional, this represents a connectivity constraint that places UK patients at a scheduling disadvantage relative to Australian counterparts and may reinforce the seasonal concentration of UK search demand observed in online search trends data.

## 5. Structural Demand Drivers

### 5.1 Cost Differential as Primary Motivator

The foundational economic logic of dental tourism to Vietnam rests on a pronounced and widening cost differential between Vietnamese dental providers and those operating in Australia, the United States, and the United Kingdom. Dental implant procedures that command USD 3,000–6,000 or more per unit in the United States, and comparably elevated pricing in Australia and the UK, are available from accredited Vietnamese providers at a fraction of those costs — without a commensurate sacrifice in clinical outcomes for patients who select appropriately vetted facilities.

This differential is not a static condition. As domestic dental costs in Anglophone markets continue to rise — driven by practitioner shortages, real estate costs, regulatory overhead, and consumable price inflation — the relative value proposition of Vietnamese providers is likely to strengthen, not erode.

### 5.2 Clinical Quality and Patient Experience Investment

A second-order driver of demand growth, and arguably the most consequential for long-term market sustainability, is the deliberate capital investment made by leading Vietnamese dental clinics in patient experience infrastructure. All-inclusive packages — encompassing international flight coordination, airport transfers, hotel accommodation across multi-visit treatment periods, interpreter services, and post-procedure follow-up protocols — have become standard offerings from premium-tier Ho Chi Minh City and Hanoi providers.

This packaging approach directly addresses the logistical anxiety that has historically inhibited medical travel conversion among patients who are receptive to the cost argument but uncertain about navigating a foreign healthcare system. The reduction of perceived complexity is as commercially significant as the reduction of financial cost.

### 5.3 Government Policy Support

Vietnam's national government has formally incorporated dental and medical tourism into its tourism development strategy, designating it a strategic pillar project. Operational manifestations of this policy stance include the streamlining of the e-visa process (via [evisa.gov.vn](http://evisa.gov.vn)), the establishment of a dedicated dental tourism facilitation portal ([dentaltourism.vn](http://dentaltourism.vn)), the conduct of destination promotional roadshows in Australia, and the identification and promotion of vetted dental providers to international patient audiences.

Government involvement at this level signals long-term institutional commitment to infrastructure and regulatory improvements that will reinforce — rather than merely accompany — commercial market growth. Historical parallels in Thailand and South Korea suggest that government-backed medical tourism frameworks tend to materially accelerate international patient volumes once established.

## 6. Market Tier Assessment and Strategic Implications

### 6.1 Tier Classification Framework

Based on the composite analysis of visitor volume, dental tourist estimates, clinical infrastructure, expatriate population, search demand, and flight connectivity, the nine cities studied can be classified into three strategic tiers:

#### **Tier 1 — Established Markets (Prioritise Consolidation and Depth)**

Ho Chi Minh City and Hanoi. Both cities possess the clinical scale, international connectivity, and established patient awareness to support significant patient volume immediately. Strategy in these markets should focus on provider differentiation, clinical accreditation visibility, and the optimization of patient acquisition cost through digital channels.

#### **Tier 2 — Growth Markets (Invest in Awareness and Infrastructure)**

Da Nang and Hoi An. These markets demonstrate meaningful search demand and a growing dental provider base against a backdrop of strong leisure tourism momentum. Their strategic opportunity lies in itinerary integration — positioning dental treatment as a component of a broader cultural or resort travel experience rather than as a standalone medical journey.

#### **Tier 3 — Emerging and Speculative Markets (Monitor and Develop Selectively)**

Nha Trang, Phu Quoc, Hai Phong, Can Tho, and Hue. These cities represent early-stage or niche opportunities that do not yet warrant material investment for Anglophone market development but warrant ongoing monitoring. Phu Quoc — given its Australian visitor base and expanding resort infrastructure — is the most likely candidate among this group for near-term promotion to Tier 2 status.

### 6.2 Source Market Prioritisation

For organizations engaged in Anglophone patient acquisition or provider partnership development across Vietnamese dental tourism corridors, the recommended market prioritisation hierarchy for the 2026–2028 period is as follows:

1. Australia — The highest-volume, highest-growth, and logistically best-positioned Anglophone source market. Investment in Australian patient acquisition should be the primary focus.
2. United States — Fastest-accelerating new demand signal (demand doubled since April 2025). Logistical barriers are higher but cost differentials are sufficient to sustain conversion. A five-year development horizon is appropriate.
3. United Kingdom — A seasonally structured market requiring campaign timing alignment with the June demand peak. Lower absolute volumes but a quality-sensitive patient demographic with established medical tourism precedent.

## 7. Conclusions

Vietnam's dental tourism sector has crossed an inflection point. The simultaneous convergence of sustained search demand growth from Australia and the United States, deliberate government facilitation of international patient access, and significant clinical quality investment by Vietnamese providers has created conditions for accelerated structural growth rather than cyclical fluctuation.

The data presented in this study supports a central conclusion: dental tourism in Vietnam is no longer a fringe or experimental market segment. It is a measurable, government-supported, and infrastructure-backed healthcare corridor serving an expanding international patient population. Ho Chi Minh City and Hanoi are established fixtures in the global dental tourism landscape. Da Nang and Hoi An are ascending rapidly. And the national policy environment will continue to lower barriers to access for international patients.

For Medical Tourism Corporation and its partners, the strategic imperative is to deepen engagement with Vietnamese providers across Tier 1 and Tier 2 markets while cultivating and collaborating with high-quality dental clinics and hospitals, for best patient experience.

The core strategy for Medical Tourism Corporation and its partners is to enhance patient experience by intensifying collaboration with high-quality dental clinics and hospitals. MTC has successfully built strong relationships in Tier 1 and Tier 2 markets. However, the company needs to intensify its engagement with Vietnamese dental providers located in Tier 3 markets.

## 8. References and Data Sources

### Foreign Tourist and Destination Data

- Vietnam National Administration of Tourism — <https://vietnamtourism.gov.vn/en/statistic/international>
- Vietnam Travel — <https://2025.vietnam.travel/en/tag/monthly-tourism-statistics/>
- VietnamPlus (English) — <https://en.vietnamplus.vn/>
- Vietnam Briefing — <https://www.vietnam-briefing.com/news/vietnams-tourism-boom-during-tet-2025-leading-destinations-and-insights.html/>
- Vietnam News — <https://vietnamnews.vn/society/1743207/viet-nam-s-international-tourism-sees-best-year-in-2025>
- Sai Gon Giai Phong Online — <https://en.sggp.org.vn/ho-chi-minh-city-welcomes-nearly-86-million-international-visitors-in-2025-post122878.html>

### Expat Population Data

- William Russell Expat Guides — <https://www.william-russell.com/blog/expat-guide-moving-living-vietnam/>

- Vietnam Ministry of Labour, Invalids and Social Affairs — <https://english.molisa.gov.vn/>

## Dental Tourism Market Size Estimates

- Ken Research — <https://www.kenresearch.com/industry-reports/vietnam-dental-services-industry>
- TechSci Research — <https://www.techsciresearch.com/report/vietnam-dental-services-market/9330.html>
- IMARC Group — <https://www.imarcgroup.com/vietnam-medical-tourism-market>
- VietnamPlus International Arrivals Report — <https://en.vietnamplus.vn/international-arrivals-to-vietnam-hit-new-record-in-2025-up-over-20-post335449.vnp>

## Government and Regulatory Sources

- Vietnam National Administration of Tourism — Dental Tourism Policy: <https://vietnamtourism.gov.vn/en/post/21466>
- Dental Tourism Vietnam (Government Portal) — <https://dentaltourism.vn>
- Vietnam E-Visa Portal — <https://evisa.gov.vn>

## About Medical Tourism Corporation

Medical Tourism Corporation is a Dallas, Texas-based healthcare facilitation organization specializing in connecting international patients with accredited providers across global dental and medical tourism destinations. The organization provides research, advisory, and patient coordination services to individuals, corporate health programs, and insurance entities.

**Website:** [medicaltourismco.com](http://medicaltourismco.com) | **Location:** Dallas, Texas, USA