Travel and Tourism in Czech Republic to 2019

Description: The travel and tourism sector witnessed strong growth in 2014, particularly in terms of inbound arrivals and inbound tourist expenditure. Inbound tourist arrivals grew by 7.1% in 2014, totalling 10.4 million while expenditure expanded by 7.5% reaching CZK130.3 billion (US$6.6 billion). Increase in arrivals from key source countries, particularly Germany and Italy, has been a key driver of this growth. With an improving economic scenario, arrivals from both, Germany and the Czech Republic increased by 8% in 2014 over the previous year.

Key Findings
- The Czech government is increasingly prioritizing to move tourism beyond concentration in the capital, Prague, and increase the potential of undiscovered places in the country. Most significant source markets are Germany, Russia, Italy, the UK, the US, Slovakia, and Poland while demand is also increasing from remote markets, particularly China and South Korea. Inbound arrivals to the Czech Republic from China increased at a CAGR of 22.35% during the historic period while arrivals from South Korea expanded by 22.83%

- 2014 proved to be another successful year for the travel and tourism sector. The sector’s contribution to GDP grew for the third consecutive year in 2014, helped especially by strong demand from international travelers. Direct tourism output totaled CZK229.2 billion (US$11.7 billion) in 2014, representing 5.7% of the GDP. Direct tourism employment as a percentage of total employment stood at 4.7% in 2014, with a total of 234,000 jobs in 2014.

- The government of the Czech Republic adopted “The State Tourism Policy Concept in the Czech Republic for the period of 2014-2020” in March 2013. The document prepared by the Ministry of Regional Development follows the “State Tourism Policy Concept in the Czech Republic for the period of 2007 - 2013”. The aim of the strategy is to enhance competitiveness of the entire tourism sector at national and regional levels, sustaining its economic performance and positive impact on socio-cultural and environmental development.

- After recording a decline for six years consecutively, the airlines market registered positive growth in 2014 as the economy showed signs of recovering. Revenues increased by 2.7% in 2014 totaling CZK25.4 billion (US$1.3 billion), but the overall growth during the historic period stood at a negative CAGR of -3.18% due to contraction in economy. Revenues also declined due to deteriorating performance of Czech Airlines as its expansion plains failed.

- With an improving property investment market and recovering tourist market, the hotel market is expanding and new brands are entering the Czech Republic. The country is seeing inbound tourists from new regions, such as Asia, who prefer hotel brands with which they are familiar in other markets. New brands that have entered in the market include Penta Hotels, Motel One, and BandB. Pental Hotels entered the market in 2013 while the remaining entered in 2014.

- As part of its ongoing expansion strategy in Europe, Enterprise Rent-A-Car entered the Czech Republic market in 2013 through a franchise business model. It selected Czechocar CZ Ltd as its franchise partner in the country. Founded in 1993, Czechocar has established itself as a leader in the Czech car rental market. The decision was taken in the light of growing tourism market in Czech, particularly in Prague.

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

- Historic and forecast tourist volumes covering the entire Czech Republic Travel and Tourism sector
- Detailed analysis of tourist spending patterns in the Czech Republic 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 Czech Republic Travel and Tourism sector

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

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