

Vyřizuje: XXX Vedoucí oddělení vnitřních věcí

Č.j.: CZT/2024/OVV/2491

XXX trvale bytem XXX nar. XXX

V Praze dne (viz datum elektronického podpisu)

Věc: Odpověď k žádosti o poskytnutí informace podle zákona č. 106/1999 Sb., o svobodném přístupu k informacím, ve znění pozdějších předpisů

Vážený pane XXX,

e-mailem ze dne 24.9.2024 jste ve smyslu ustanovení § 2 zákona č. 106/1999 Sb., o svobodném přístupu k informacím, ve znění pozdějších předpisů, požádal o poskytnutí informací, a to:

 Zaslání kompletní verze Analýzy české gastronomie včetně všech příloh a uhrazených faktur ze strany České centrály cestovního ruchu -CzechTourism, které souvisí se zpracováním analýzy. Dílčí výsledky analýzy jsou publikovány na https://www.czechtourism.cz/cs-CZ/Novinky/Archiv/2024/09/Vysledek-analyzy-Ceska-gastronomie-je-na-vzestupu.

K Vaším dotazům Vám sdělujeme následující:

- 1. Požadovanou analýzu zasíláme v příloze.
- Vaši žádost částečně odmítáme v části týkající se faktur, které nemáme k dispozici. Rozhodnutí o částečném odmítnutí žádosti zasíláme v rovněž příloze.

S pozdravem

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AGENDA



7 THE CULINARY AUDIT & EXPERTISE

Methodology, context and tasks

O2 CULINARY SCENE ANALYSIS

O3 BENCHMARKS

O4 CONCLUSIONS AND RECOMMENDATIONS

EXPERTISE

REVIEW OF THE CULINARY AUDIT METHODOLOGY

A SIX-STEP APPROACH













1. PREPARATION

Establish client expectations

Define distinctive & special features of destination

Select project team & planning

2. DATAMINING

Research Phase

Restaurant shortlist with highest culinary potential

3. TEST & REVIEW ON THE FILED

Restaurants tested by team of gastronomy & hospitality experts

4. FEEDBACK MEETINGS

Review of results and experience exchanges among the field-team

5. EDIT REPORT & FINAL REVIEW ON THE FIELD

If necessary, experts will return to the field to confirm findings

6. PRESENTATION OF RESULTS & FINAL REPORT

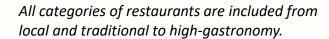
A comprehensive report will be presented by the Culinary Audit team

CULINARY AUDIT METHODOLOGY

A CLOSER LOOK

DATAMINING STEP 2

Define the shortlisted restaurants:





- Team knowledge & experience
- · Chef and Staff background
- Local reputation
- Local guides
- International guides

- Local network
- Customer listing
- Mass media
- Vox populi







More than 2 different expert profiles are actively involved in the Culinary Audit At least 1 meal will be made for every interesting shortlisted restaurant (according to the contract signed with the client) While in the field, culinary experts may adjust restaurant shortlist based on their expertise and experiences (may add or remove a restaurant)

AGENDA



7 THE CULINARY AUDIT & EXPERTISE

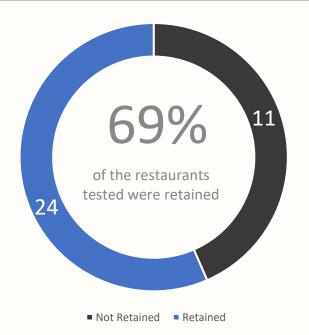
- **O2** CULINARY SCENE ANALYSIS
 - Audit perimeter
 - Cuisine types sampled
 - Food criteria
 - Comfort and service
 - Value for money
 - Sustainability
 - SWOT analysis
- O3 BENCHMARKS

O4 CONCLUSIONS AND RECOMMENDATIONS

DIAGNOSIS PERIMETER: THOUGH ALL 13 REGIONS BEYOND PRAHA WERE CONSIDERED FOR THE AUDIT, THE RETAINED RESTAURANTS WERE FOCUSED AMONG 10 REGIONS

RESTAURANTS TESTS

- 35 restaurants tested
- 24 restaurants retained
- 69% of tested restaurants were retained
- Sampled restaurants varied in style, cuisine types, prices and atmosphere



RESTAURANTS TESTS

- The initial list of restaurants studied included 136 restaurants from across all 13 provinces (beyond Praha) of Czechia.
- This pre-study was then condensed to a shortlist featuring 56 restaurants across 12 regions.
- 10 regions and 35 restaurants were visited during the final Audit, 5 more restaurants than contracted.

Region	Pre-Study
South Bohemia	16
South Moravia	14
Karlovy Vary	20
Vysočina	6
Hradec Králové	14
Liberec	10
Moravskoslezský	10
Olomouc	9
Pardubický	4
Pilsner	8
Central Bohemia	9
Ústí nad Labem	8
Zlín	8
TOTAL	136

- South Moravian, Karlovy Vary, Hradec Králové, South and Central Bohemia were standout regions for Culinary Potential – with just over 60% of the retained restaurants being from these 5 regions.
- Worth note that there is a decent spread of highquality restaurants throughout all regions tested.
- Weakest culinary maturity was identified in Pardubický, Vysočina, Liberec. Though some restaurants did make it onto the shortlist, the level was determined too low to merit a visit among the top 30 scheduled for this Audit.

A NOTE ON THE 10 REGIONS VISITED IN THE PRODUCTION OF THIS REPORT

RESTAURANTS TESTS

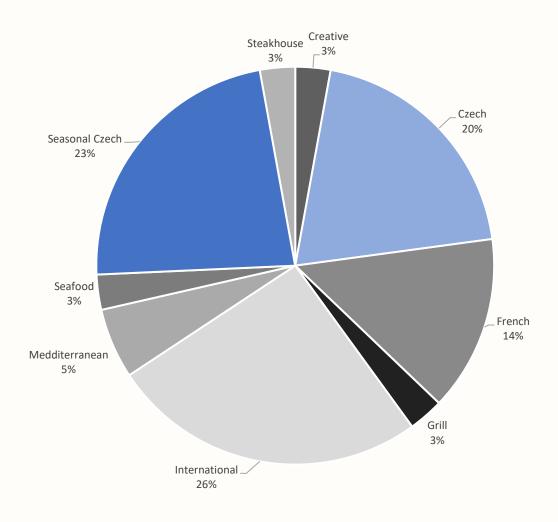
Within the technical specifications of the Audit Report the team of experts are tasked with testing 30 of what may be determined to be the 'highest quality' restaurants.

This selection of restaurants is determined by analyzing the restaurants among food criteria including quality of ingredients, technical kills of the kitchen staff, personalized approach to gastronomic cuisine (storytelling through food), and creativity.

During the datamining phase the team built a list of all potential restaurants to be visited – in this case the initial list featured 136 restaurants and included all regions beyond Prague. When whittling down this list to the 30 restaurants to be visited as per the contract, the top-30 "high-priority" restaurants fell within only 10 regions of the Czech Republic.



CUISINE TYPES SAMPLED: A HEALTHY VARIETY OF CUISINE TYPES – PARTICULARLY FOR NON-URBAN CENTERS – WITH A PLEASING BEND TOWARD SEASONAL AND LOCAL CUISINE



CUISINE TYPES IN CZECHIA BEYOND PRAGUE

Restaurants tested largely offered Traditional cuisine, which is always a nice encounter for an international traveler who hopes to explore the local flavors.

Pleasantly impressed by the seasonal attention to cooking - using local ingredients adapted to the season.

Particularly for a study beyond the urban center of Prague, impressed to see that the market is still varied, featuring selection of the well-known cuisine styles and offering some interesting diversity.

FOCUS: CZECHIA BEYOND PRAGUE

BRNO



- Second largest city behind Prague.
- Lively city with some tourists, but not overrun.
- Lovely Christmas market on different squares in the historic center.
- Easy to get around (Uber, trams run as well).
- Very clean and everything in the historic center feels well restored.
- Lively Bar scene with a great presence of Beer Halls and Pubs and microbreweries.

OSTRAVA



- Third largest city behind Prague and Brno.
- Worth noting that the culinary scene here feels far less developed than in the other two urban areas.
- Clearly an area with much to offer in terms of beauty and room for development in terms of Culinary Potential.

AND BEYOND



- Extremely pleased with the spread of the Culinary "finds" around the country.
- 10 of the 13 regions (excluding Prague) eligible for study during this Audit were visited, having identified high-potential restaurants.
- Among others, Trebon and Karlsbad were noted as particularly interesting as tourist destinations due to history & nature.
- South Moravian, Karlovy Vary, Hradec Králové, South and Central Bohemia were standout regions for Culinary Potential.

STANDING

AVAILABILITY / ACCESSIBILITY

- Easy & accessible reservation process.
- Almost all high-end restaurants as well as many of the more casual restaurants offer online booking services.
- Otherwise, reservation by phone was very easy and always super friendly. Everyone spoke English and sometimes even German. Restaurants were reactive, often called back right away if we didn't reach someone.
- Interesting observation that some restaurants ask you to state how long you will be there (i.e. click on 1.5 or 2 hours).
 Yet it doesn't look or feel like they are limiting you to a certain timeframe once you are there...?
- Even in more remote places there are many opening times, hardly any days closed and often not just for lunch but open all day.

ATMOSPHERE / DRESS

- Overall, the atmosphere in the restaurants is easy going and relaxed.
- Never encountered an enforced dress code.
- Unspoken dress code often only in elegant/high class restaurants, but even there only smart-casual, never too stiff. This helped to make for an agreeable relaxed and cozy atmosphere.
- Most often very well maintained and clean. Furnishings are either quite modern and trendy or traditional and lovingly decorated.
- During our visits, the restaurants were rarely fully booked.

SETTING

- Locations were almost always very well kept, renovated or presented.
- Beyond the urban centers, every now and then, one is exposed to exceptional locations such as a former castle with a park or a former farm. These venues are large and imposing and can add a unique difference to the urban feel simply in the size of the property.
- Clean, very good maintenance, can tell there is a lot of care, attention and pride put in by ownership and staff.
- Especially historic sites were renovated beautifully providing a real "immersive" feel to the dining experience.

OWNERSHIP

- Observed a healthy mix of hotel restaurants and privately owned restaurants.
- Privately owned restaurants seemed to be owned by external investors as opposed to the Chefs themselves.
- No chain restaurant (i.e. Atelier Robuchon, Nobu etc) were observed. Which is very nice for travellers who want to experience regional cuisine, but the (named) presence of an international top chef can also enhance an areas reputation. There are opportunities for the future to bring outlets from well-known chefs to the Czechia.
- Many restaurants are in hotels is the general perception. In addition to the spatial conditions, hotels also offer financial security, especially in weaker seasons.

KEY TRENDS IN THE LOCAL CULINARY SCENE

STRONG LOCAL CUISINE

- Exceptional offering of local cuisine, particularly excited to see seasonality taken into consideration.
- From dumplings to braised dishes (Gulasch, stews etc.) and beyond it was easy to see a clear pride and attention to local cuisine.
- Particularly interesting selection of wild game options (fallow deer, for example) mixed in with great local vegetable options like beetroot and mushrooms.
- Beef seems usually the most expensive item on the menu – Steaks are expensive.
 Braised dishes like traditional roasts or stews are cheaper. The preparation was almost always very good in both cases.
- There are a few restaurants where they already offer traditional cuisine with a modern twist.

LIMITED INTERNATIONAL INFLUENCE

- Hardly any luxury products from around the world on the menus – surprisingly refreshing to see a focus on the local products.
- In the cases where outside influences were observed, it was then mainly Asianinfluence (dim sum and sushi for example).
- Top-Chefs who have worked abroad bring international technics and flavorcombinations into the country. This international training was mainly clear through technique (like classic French base technique for sauces/jus, Italian style pasta making and/or pasta sauces etc.)

RESPECT FOR LOCAL PRODUCTS

- Clear attention and pride in using local and seasonal products – fantastic to observe as the international travel often seeks out the 'local flavors.'
- The Fallow Deer was an absolute standout. In most instances it was prepared with care, very good quality and flavor.
- The frequent use of mushrooms was observed as a prevalent trend. This was very refreshing to see since often mushrooms are used as a side note in western cuisine, seldom they are celebrated like observed here.
- Coffee offering was surprisingly abundant. It was found to be sold all over the cities from small shops or carts and often very high quality.

GROWTH IN SUSTAINABILITY

- There is a desire and understanding to use and refine regional products.
- The topic of sustainability is becoming more and more popular here and is selling well.
- Some restaurants in the countryside had herb gardens.
- Some displayed their pickled and aged harvest in the restaurant for everyone to see.
- Although foraging was not actively communicated to the client, it appeared a lot of these products come from just that.

MENUS

MENU

- Menus offered predominantly seasonal and regional selection, based on Czech and French cuisine styles.
- Some of the more casual /local restaurants offer small dishes/half portions – always a welcome observation and makes sharing an enjoyable possibility.
- The main courses include mainly meat dishes, almost always a few vegetarian alternatives and not always but often a few fish dishes. Predominantly sea fish and crustaceans, rather rarely regional freshwater fish. One place used fish from a nearby lake and communicated this as clear USP.
- Usually, lunch offers separated from dinner offers – the lunch dishes are prepared a little more simply. They are often cheaper for the guest and are served quicker, so they are also suitable for business guests. A pleasant equal attention to freshness for lunch and dinner.
- With a few exceptions, almost all menus were also offered in English.

A LA CARTE & TASTING MENU

- The menu styles (tasting menu vs. à la carte) reflected well the setting and ambiance of each restaurant.
- Most gourmet restaurants offered only a tasting menu – though worth noting that some places did not allow a single guest (1PAX) to enjoy a tasting menu.
- Tasting menus were often harmoniously portioned. They were also varied and excitingly combined (again, often with the use of seasonal and local products, even if only to support other main ingredients).
- The menus are often pleasantly clear, with a small but well-arranged selection of a la carte dishes. Seasonally flexible.

DESSERTS

- Often simple and traditional desserts, hardly any complex modern creations.
- Typical problem that there are probably no high end Pâtissiers (commonly observed) the desserts, therefore, remain more on the basic side (made by chefs, themselves).
- Technique is more basic when it comes to desserts (Parfaits, Cremes and so on).
- They serve things that work and are quickly prepared (ice cream with some chocolate mousse of pieces of chocolate + crumble and some fruit or berries).
- Depending on the cuisine style, one can regularly find regional, traditional desserts.

KITCHEN STAFF & SERVICE

CHEF & KITCHEN

- Most chefs were either young or middle aged no "old" chefs observed. Hardly any female head chefs but often could see some female chefs in the kitchen.
- Good mix between internationally trained (mainly GB and France) and locally trained chefs.
- It was obvious that the chefs/owners take great pride in what they do but should feel empowered to really showcase their individual style.
- Most of the chefs in the countryside seem to have worked/been trained in Prague for at least a while.
- The menus and dishes were often prepared without their own style and were therefore identical to many other restaurants.
 Only a few have added their own touch or even created their own dishes, especially in fine dining restaurants.
- Some of the chefs in high-end / ambitious restaurants mention on their websites that they worked in Michelin starred restaurants in Europe, but only very seldom did they mention the exact restaurant with name and their mentor.
- Overall care could be improved, often the talent is clearly visible, yet they don't seem focused 100% and take it very easy in the kitchen.

SERVICE

- Service is friendly, open-hearted, and always very hospitable.
- In most cases English was spoken without a problem.
- Noticed, however, that servers typically simply put the plate down in front of you (in most places, not all of them) and then leave – there is no description of the dish nor of its ingredients or preparation. Perhaps due to language barrier? This gives the impression that the service is not very knowledgeable about the food and drinks being served. Sometimes the chef/owner would explain a dish at the table.
- Always friendly and smiling albeit no additional "small talk" or chatter. Although not always "trained" service, often service was experienced and quick.
- "Classic" service really only observed in the gourmet restaurants, which is fitting. Service style should match the restaurant's larger ambiance.
- City of Brno was a standout in terms of service the communication was much more modern and detailed.
- Only in upscale establishments could one recognize a classic service brigade or at least a manager (maître). In most restaurants there were few service staff anyway, without clear leadership.

WINE & BEVERAGES

WINE OFFERING

- Wine lists typically featured some Czech wines sprinkled among wines from the "classic" regions of France, Germany and Italy.
- Czech wines didn't appear to be strongly valorized – even sometimes met with servers questioning the choice: "You want the Czech wine? It's not very good!" trying to steer consumers toward a more classic wine choice.
- Really a missed opportunity because the Czech wine is great! There are Czech wines which are really made well and could especially be integrated in menus/offers which highlight Czech regional/seasonal cuisine.
- In Brno, in particular, restaurants were more proudly serving wines from the Morovian-Region.

WINE SERVICES

- Wine service is a key area for improvement among service staff – even some basic education can help to elevate the level significantly.
- Although there was the occasional sommelier – wine felt more of an afterthought than as a true addition to the dining experience.
- Servers often simply poured the wine no description of where the wine was from, what to expect in the flavors, or how it was made.
- Room for refinement in even the simplest of techniques - how to hold the bottle, how to pour the wine, how to allow for a taste before pouring a full glass.

COCKTAILS

- A small cocktail offering typically exists a handful of your most classic cocktails listed on a menu.
- Definitely far from being described as an identifiable "cocktail culture" with most patrons opting for beer or wine and the restaurant offering follows suit.
- There is, however, a few rare exceptions with a full bar / cocktail menu worth mentioning – perhaps a trend beginning to bud. Could be observed mainly in Brno though.
- "Becherovka" is a greenish-yellow herbal bitters from Karlovy Vary in Bohemia.
 Quite famous and often promoted throughout the country.

BEER

LOCAL BEER

- Breweries are everywhere clearly an important cultural aspect and unique selling point for the country vs. other players in the region.
- Beyond the big players it is fantastic to see so many microbreweries which have their own "pub" serving food – great variety and selection of beer styles and flavors.
- In some smaller cities the big breweries (Pilzen, Staropramen and Budweis) seem to have taken over and it was not always certain to get served a beer from a small, independent brewery.
- Some restaurants do incorporate local beers from small breweries into their offers. They were usually only offered on the menu (or in some cases on whiteboards on the wall) but not really actively "pushed" or promoted. This could only be observed in some of the brew-pubs where the beer-masters and servers would recommend specialty beers.

BEER TOURISM

- As opposed to some of the restaurants, all the beer pubs are usually full... the beer pubs are clearly a local attraction worth visiting.
- The beer pubs are almost everywhere, especially in the city centers but not limited to! They can also be found in some of the more remote areas.
- Some only have their own beer (microbreweries for example) - others serve beer from different breweries.
- Although you hear lots of different languages in the beer pubs, locals still dominate the crowd, usually small groups of friends.

BREWERIES VS. RESTAURANTS

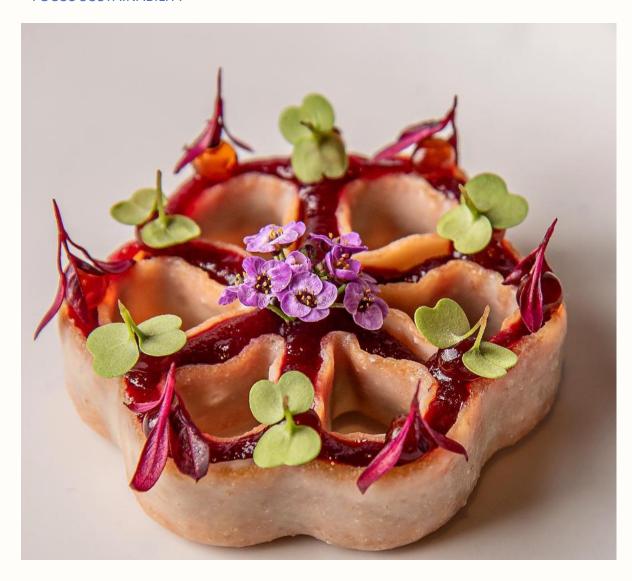
- Many of the restaurants visited and particularly those deemed "gourmet" in nature – cater more to wine and winedrinkers. The menus may offer the occasional small selection of beer, but it is not what is valorized in terms of pairing with the food.
- Beer is often simply there to round out the menu as opposed to be the main player as beverage service. Was usually not actively sold.
- Beer seems to exist in its own separate cultural plane – with Breweries and Brew pubs dedicated specifically to the service of Beer with an important clientele.
- It might be worth considering, that the client who only comes for beer might not want to dine in the high-end restaurants but rather in the beer-pubs or local hostinec.

BEER SERVICE

- Beer service within the pubs is an exceptional with unique touches such as the chilling of the steins in a cold water bath just until the moment of service and the special attention to foam classic to the Czech pour.
- Outside of the beer pubs and within the more 'gourmet' restaurants, however, beer does not appear to be a focus – beer service seems to exist largely in an entirely separate scene.
- If there is a desire to further integrate beer-service into the gastronomy scene, we see two clear opportunities: (1) Offer a beer-pairing with tasting menus as an option in addition to or instead of a winepairing (2) Consider bring gastronomy to the beer-pubs and elevating the food offering within the pubs themselves.
- "Beer pubs" with great regional food could be a true USP for Czechia – prices are not the issue yet more the attention to detail, flavor and overall preparation.



FOCUS SUSTAINABILITY



SUSTAINABLE GASTRONOMY IN CZECHIA

Sustainable gastronomy has begun receiving initial attention, but still has great development potential to make greater and impactful progress in Czechia.

The use of seasonal and regional products is common, but not always consistent. The attention to seasonality and freshness, however, is really a standout observation in Czechia.

Little information and communication on the topic of sustainability. It is important to inform the consumer on the sustainable practices taking place behind the plate in order to inform, educate and inspire.

OBSERVED STRENGTHS, WEAKNESSES, OPPORTUNITES & THREATS

STRENGTHS • Beautiful cities and settings – much to explore through meals & beyond! • Modern infrastructure makes for easy travel. • Flexible & accessible (ease with reservations, changing of dates, times and access to information in English language). • Very hospitable, friendly & open to travelers. Restaurants are well staffed – notable when many places are facing shortages. Fast service and cooking. • Prominence of Czech cuisine, both in its traditional form and in some unique cases reimagined and creatively transported into modern times. Overall, the culinary scene keeps pace internationally and use modern S W technologies – the Chefs are generally well trained. • Focus on regional products, freshness & seasonality a real standout.

WEAKNESSES

- Lack of care in preparation in some places.
- Wine service/knowledge remains a key area for easy improvement
- Lack of pride in CZ products (food and wine).
- The service is often limited to just serving. No active action, hardly any support, hardly any upselling. Could be a bit more "host" instead of only "waiter."

OPPORTUNITIES

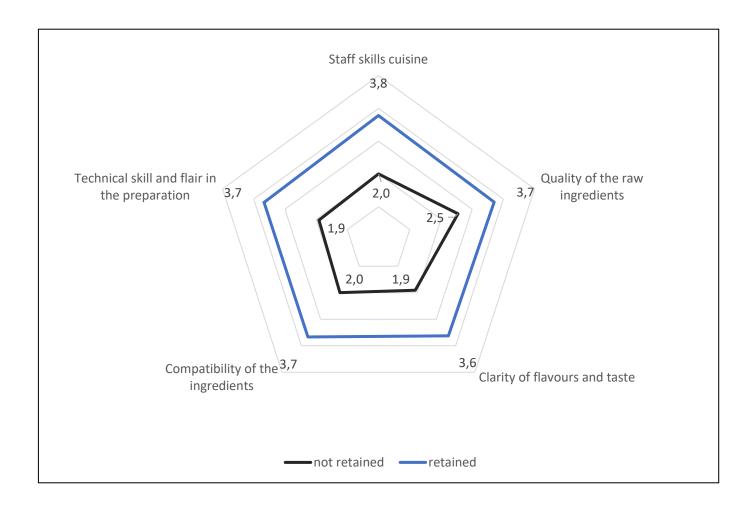
- Improve fine tuning of cooking and plating techniques, invest in staff training to add to a truly Czech experience.
- Set themselves apart with Czech wines/products be proud of them and explain to guests.
- The topic of sustainability is present here and there, but not many restaurants are actively and consciously addressing this topic.
- Develop better cuisine in the brewery restaurants to raise the image of beer as a companion for elevated cuisine and high-quality Czech food.
- Restaurants will be in the spotlight and might be able to join organisations like JRE (Jeunes Restaurateurs d'Europe) and others better visibility and increased international exchange.
- Combine food trips and spa retreats.

THREATS

- Lack of pride in traditional cuisine could lead to a resistance from chefs to embrace their heritage and instead try to copy other countries cooking styles – perception that sometimes 'foreign' is better or more luxe.
- Loose/not develop a "Czech" identity in the kitchens and try to copy other nations/styles in pursuit of what is perceived as "haute cuisine."
- Loss of qualified staff (kitchen + service) to other destinations.

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FOOD CRITERIA: RETAINED RESTAURANTS ARE WELL ABOVE AVERAGE ON ALL FIVE FOOD CRITERIA WITH PARTICULAR STRENGTH IN INGREDIENTS & SKILLS



CZECHIA RESTAURANTS ASSESSED BY THE FOOD CRITERIA (0-5)

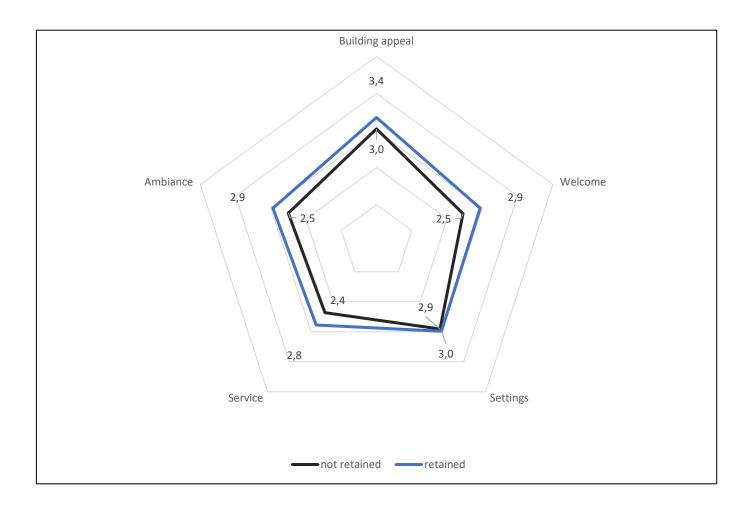
Retained restaurants were seen to have culinary scores significantly above average in all five food criteria categories.

Retained restaurants have a very well-balanced score between all five food categories — making for a strong representation of Czech culinary offering.

The widest gap between retained and non-retained restaurant scores was identified on the criteria of related to technical skills.

Quality of the ingredients had the strongest score of all food criteria for both retained and non-retained restaurants – showing that Chef ability to manipulate ingredients was a key differentiator between standout restaurant and those that fell behind.

COMFORT & SERVICE: BUILDING APPEAL A CLEAR STRENGTH IN THE RESTAURANT SCENE WITH HIGH SCORES FOR BOTH RETAINED AND NON-RETAINED RESTAURANTS



CZECHIA RESTAURANTS ASSESSED BY THE COMFORT AND SERVICE CRITERIA (0-5)

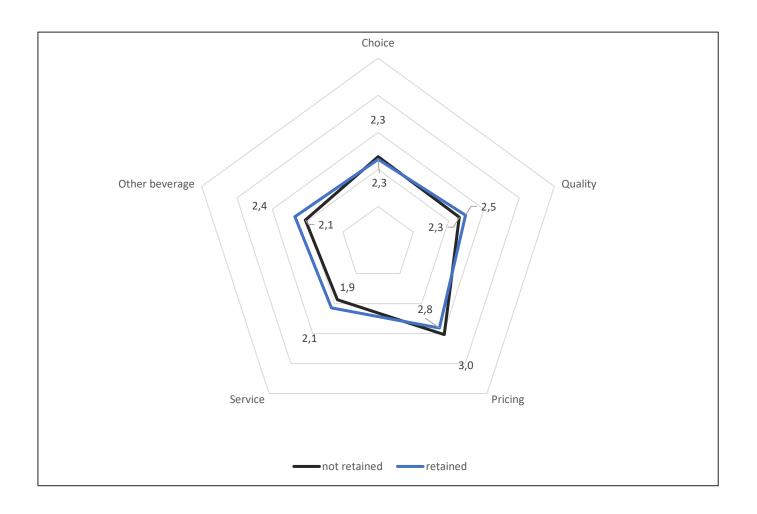
Building Appeal was a clear strength for retained restaurants and generally across all restaurants tested.

Notable room for improvement across almost all Comfort & Service criteria, although all restaurants scored slightly above average.

Welcome, Service & Ambiance are the three criteria with small but observable gaps between retained and non-retained restaurants.

Appears to be much a of "status-quo" approach to service, as opposed to something acknowledged as a means of setting a restaurant apart.

WINE AND BEVERAGES: ACCEPTABLE SCORES FOR ALL CRITERIA RELATING TO WINE FOR RETAINED RESTAURANTS, ROOM FOR IMPROVEMENT IN SERVICE



CZECHIA RESTAURANTS ASSESSED BY THE WINE AND BEVERAGES CRITERIA (0-5)

Decent scores for all retained restaurants in the criteria relating to wine choice, quality and price.

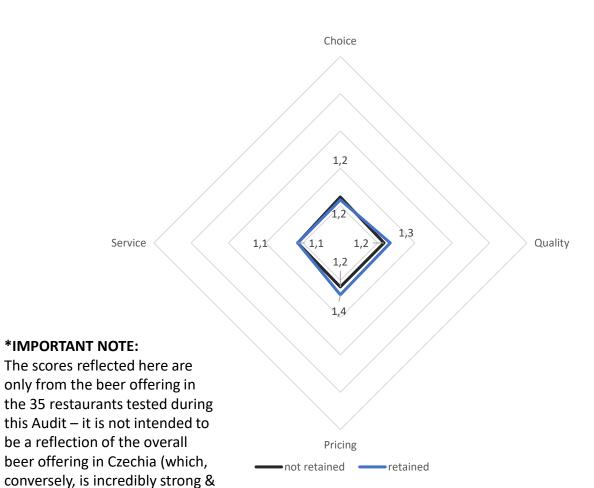
The clear weakness among all restaurants tested was the service – as beforementioned some basic skills training in wine service could help to dramatically improve the experience level.

Wine did not appear to be a clear differentiator between retained and non-retained restaurants – all restaurants scoring about average.

Much opportunity still be to seized with refinement in the wine offering.

qualitative).

BEER: BELOW AVERAGE SCORES FOR ALL CRITERIA RETAINED & NOT RETAINED RESTAURANTS, CLEARLY AN OFFER CURRENTLY AIMED AT A DIFFERENT TARGET*



CZECHIA RESTAURANTS ASSESSED BY THE BEER CRITERIA (0-5)

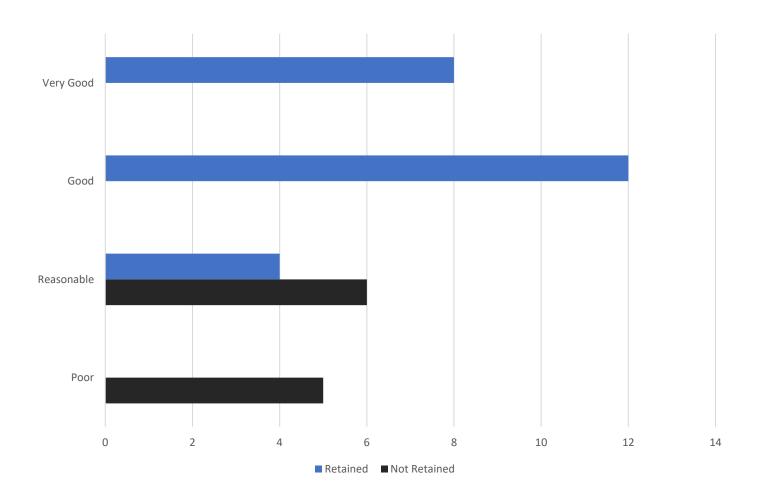
A restaurant's Beer offering and service was clearly not a deciding factor as to whether or not a restaurant was retained.

The fact that for both retained and non-retained restaurants that Beer scored below average does not mean there is not good Beer in Czechia – simply that it is not well activated in the "gourmet" space.

Likewise in the Breweries & Pubs where extremely high-quality beer was served with practice and attention – the food was rarely of high quality.

If you want Beer to be a top consideration for your international gastro-tourist, there is room to amplify is presence & service in the gourmet space.

VALUE FOR MONEY: MOST RETAINED RESTAURANTS HAVE A GOOD OR VERY GOOD VALUE FOR MONEY, THE MAJORITY OF RESTAURANTS TESTED DETERMINED TO HAVE AT LEAST A GOOD VALUE FOR MONEY.



CZECHIA RESTAURANTS ASSESSED BY THE VALUE FOR MONEY CRITERIA (0-5)

Retained restaurants demonstrated good and very good value for money, with a choice few that had a reasonable value for money. Generally, prices are quite advantageous.

All non-retained restaurants are positioned in reasonable or poor categories and are were deemed overpriced in relation to the quality they offer.

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O3 BENCHMARKS

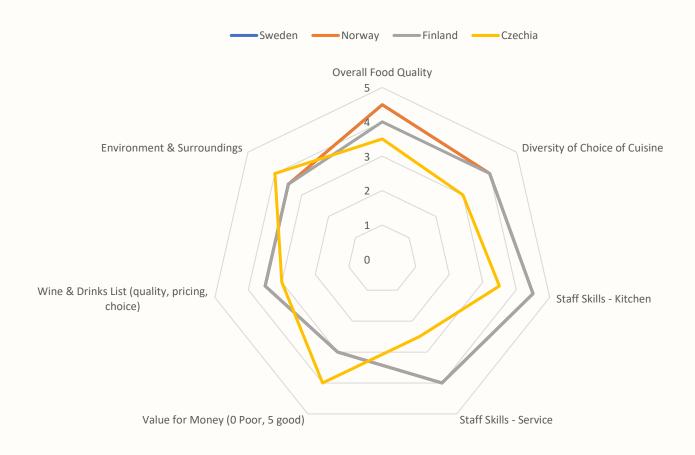
O4 CONCLUSIONS AND RECOMMENDATIONS



BENCHMARKS

REGIONAL BENCHMARK - NORDICS

CULINARY STRENGTHS & WEAKNESSES



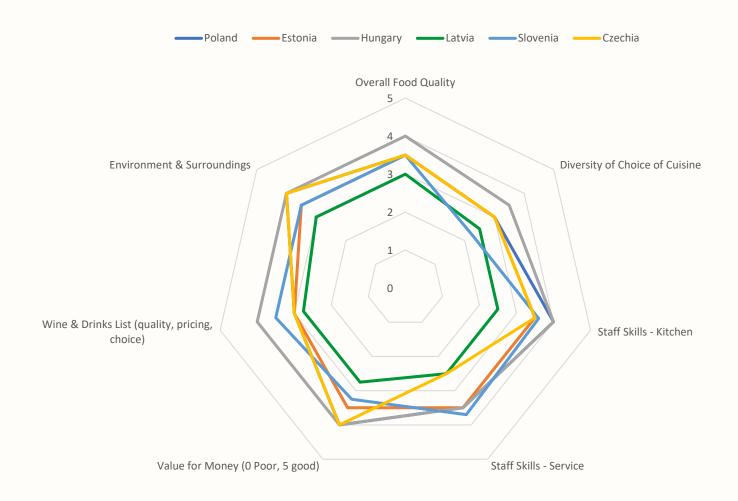
KEY POINTS:

Interesting comparison versus Nordic / Scandinavian destinations with Czechia demonstrating a particular strength in Value for Money – across food & beverage – and as well in Environment & Surroundings.

Key levers for improvement lie in technical skills training, particularly as it relates to service staff.

REGIONAL BENCHMARK - EUROPE

CULINARY STRENGTHS & WEAKNESSES



KEY POINTS:

When we open the comparison to other destinations in the region surrounding Czechia, we see that Czechia is relatively well positioned among other destinations.

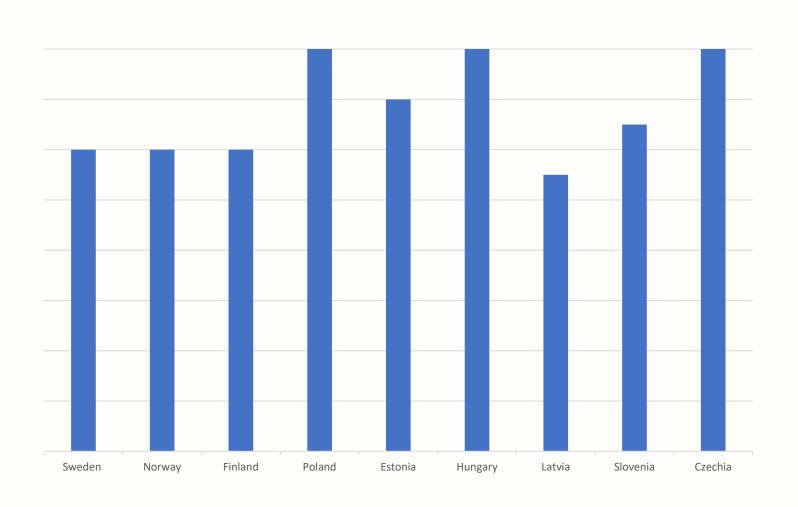
Again, we see the Czechia has a clear advantage when it comes to Environment & Surroundings - beautiful restaurants in areas that still feel like a true discovery for the international visitor.

Diversity of Choice and Overall Food Quality are axes for improvement, but worth mentioning Diversity is surely impacted by the fact that the study focused on the areas outside Prague and trended toward the traditional.

Service staff skills remains the key area for improvement vs. other regional players.

REGIONAL BENCHMARK

VALUE FOR MONEY



KEY POINTS:

Czechia has a competitive advantage in terms of Value for Money – particularly versus the Nordic & Baltic regional players.

On par with other high Value for Money destinations such as Hungary and Poland.

AGENDA



7 THE CULINARY AUDIT & EXPERTISE

O2 CULINARY SCENE ANALYSIS

O3 BENCHMARKS

O4 CONCLUSIONS AND RECOMMENDATIONS



The overall culinary potential is not consistent enough CZECHIA EVOLVING GASTRONOMY SCENE DIAGNOSIS Culinary potential is limited in the short term CZECHIA THRIVING GASTRONOMY SCENE THRIVING GASTRONOMY SCENE

136 restaurants in total were identified for the Audit. The short list of 56 restaurants to sample was created and from the 35 restaurants sampled, 24 were retained. These 24 were determined to be of a quality on-par with others in the international luxury gastro-tourism market. With a close to 70% retention rate, the Czechia culinary scene proves to have an impressive maturity level well dispersed across multiple regions.

KEY CONCLUSIONS

- Really interesting story to tell through the culinary offering in Czechia beyond Prague the focus on fresh, seasonal and regional ingredients is a differentiating factor that could be a nice draw for gastro-tourism. There is an authenticity and care in the food preparation that many will actively seek out through their travels, seeking traditional Czech cuisine.
- There is further opportunity to embrace and promote local products particularly the local wine. The restaurant scene in general could easily benefit from some basic education on wine service (similar to the attention placed on Beer service in Czechia!)
- The Beer Pubs & Beerhalls are a clearly a key attraction and are always very full and not only with tourists! The reflections as to whether Beer should be kept as a separate offer from the gourmet food scene and its clientele or, instead, should be integrated further with high-quality food offerings is one that should be pushed further. As it stands today, the "beer scene" in Czechia feels to be its own universe and it not so presence in gourmet restaurants.
- Many restaurants offer "all-day" concepts (breakfast-snacks-lunch-dinner-bar). With these concepts it is often quite a challenge to keep a
 constant level of high-quality food offering. The same applies to mixed-concept restaurants (café-bakery-restaurants) often the most
 successful restaurants (from a gourmet perspective) are those with a focused menu & concept (prioritizing quality over quantity/choice).
- As an international guest, one can hardly find any information via Google. Currently the best way to navigate a restaurant search is currently via TripAdvisor. Downside with these consumer-rated lists: cheap restaurants with large portions are often very well rated. There is a clear absence of a food-guide which is up to date and/or covers the whole country.
- There are well trained chefs who have worked abroad in gourmet restaurants increased investment in the national culinary scene could result in more "homecoming" of Czech chefs who currently live abroad in search of training and/or accolades.
- Really pleased to see a good spread of high culinary-potential restaurants across almost all regions of the country this is really unique as often the bulk of culinary talent seems to concentrate in only a few key areas.

