



CzechTourism

U.S. & Canada Inbound Travel to the Czech Republic: *facts, challenges and success stories*

Michaela Claudino
director at CzechTourism USA & Canada

28.06.2018

CzechTourism

**U.S.
POPULATION**

325 MILLION



CzechTourism

CzechTourism

PASSPORT OWNERSHIP

PASSPORT

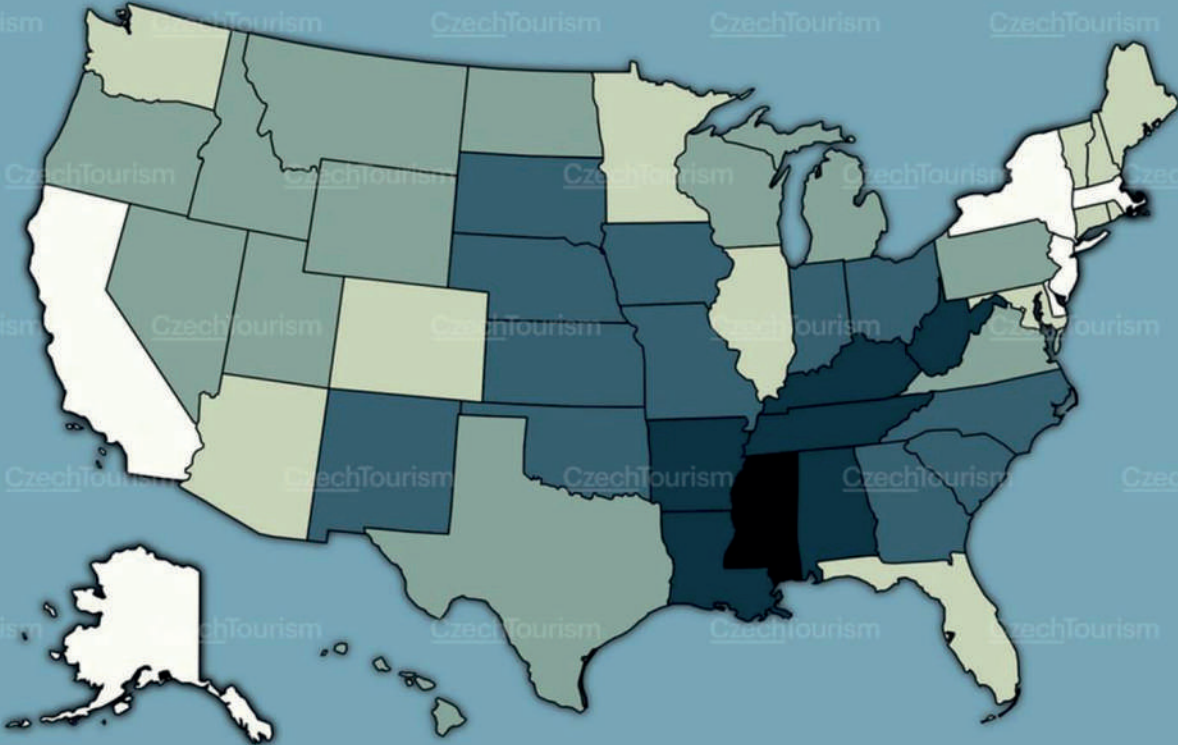


United States
of America



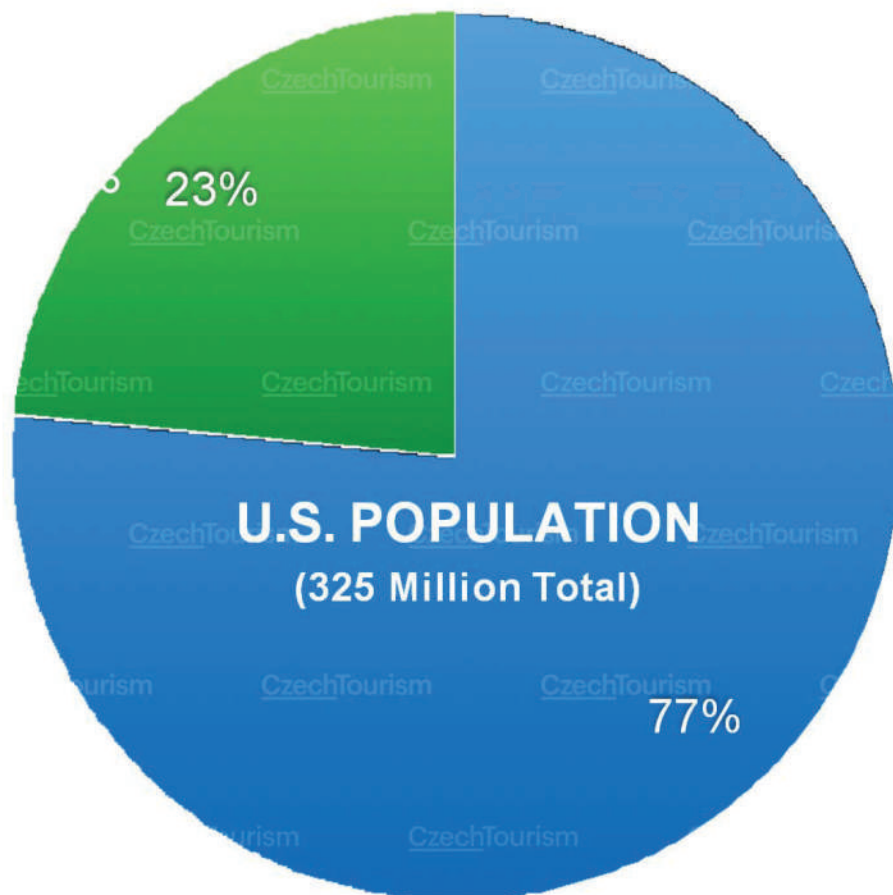
46%

PASSPORT OWNERSHIP



OUTBOUND TRAVEL

**75 million
Americans travel
internationally**



FAVORITE DESTINATIONS

WHERE DO AMERICANS TRAVEL?

CzechTourism

CzechTourism

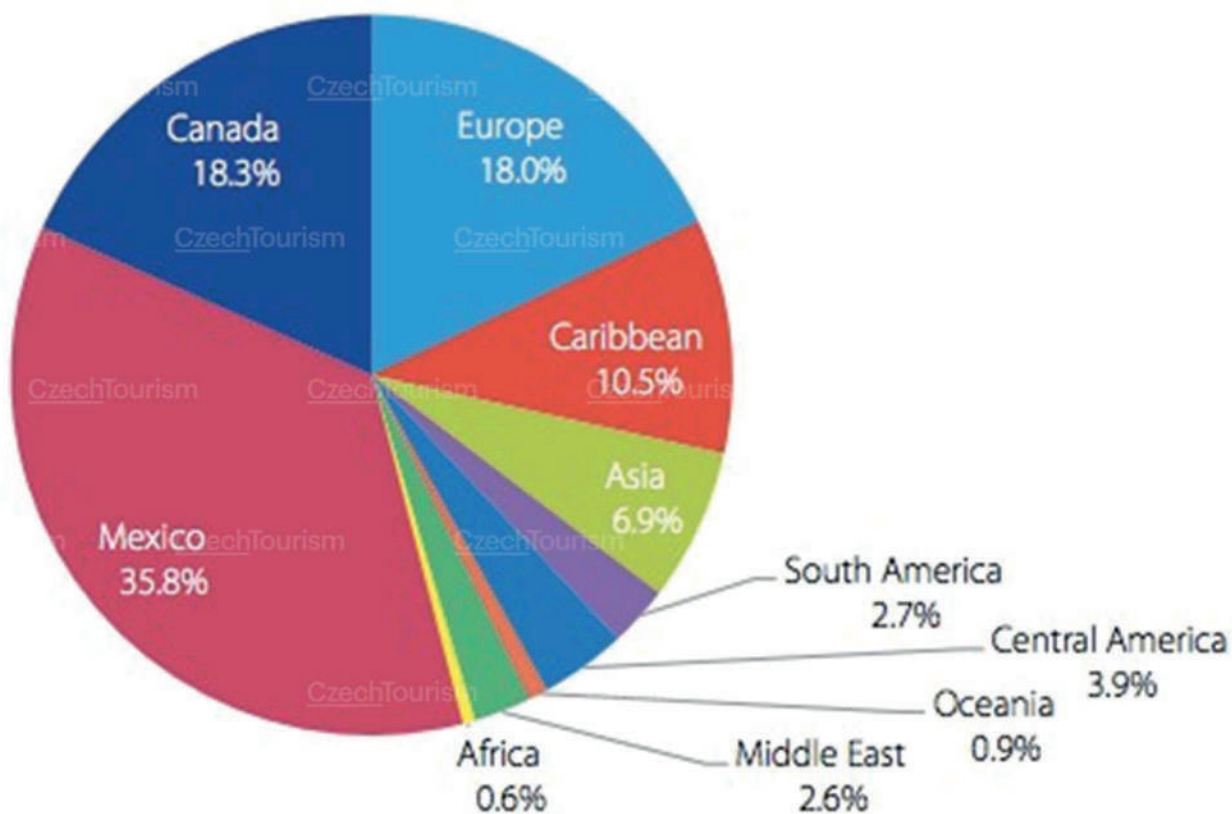
FAVORITE DESTINATIONS

NOT FAR!



FAVORITE DESTINATIONS

Figure 13: Market Share of US Outbound Travel by Region 2011-2015



Source: ITA National Travel & Tourism Office, 2016

WORLD DESTINATIONS

Market	Total Travelers	Market Share
Europe	12.6million	17%
Asia	4.8million	6.6%
CentralAmerica	2.8million	3.8%
Middle East	2million	13%
SouthAmerica	1.8million	2.5%
Oceania	643,000	1%
Africa	350,000	0.5%

WHO

**ARE THE AMERICANS
WHO TRAVEL FAR?**

AFFLUENT TRAVELERS

25 % of Americans (70 million) are considered affluent with a minimum USD \$100,000 per year.

Those making over \$250,000 take up to 7 international trips a year.




Destinations visited - Czech Republic ranked 11th

U.S. Citizens to EUROPE Profile

Visitation from U.S.

TRENDS IN VISITATION (in thousands)

Year	2009	2010	2011	2012	2013	2014	2015	2016	Change 2016 / 2009
U.S. Visitation to Europe	10,635	9,806	9,674	10,204	10,039	10,804	11,378	12,544	1,909
% Change	-5	-8	-1	5	-2	8	5	10	18

VISITATION TO DESTINATIONS ³	Market Share 2015 (percent)	Volume 2015 (000s)	Market Share 2016 (percent)	Volume 2016 (000s)
EUROPE	100.0	11,378	100.0	12,544
United Kingdom	25.4	2,890	25.5	3,199
Italy	17.8	2,025	17.6	2,208
France	20.8	2,367	17.4	2,183
Germany	15.5	1,764	15.7	1,969
Spain	11.5	1,308	11.2	1,405
Ireland	7.0	796	7.5	941
Netherlands	7.1	808	7.3	916
Switzerland	4.9	558	5.1	640
Austria	4.1	466	4.1	514
Greece	3.7	421	4.1	514
 Czech Republic	3.0	341	3.0	376
Hungary	2.8	319	2.7	339
Iceland	**	**	2.5	314
Poland	1.9	216	2.4	301

CzechTourism

source: U.S. Department of Commerce, International Trade Administration

US citizens overseas profile

SELECTED TRAVELER CHARACTERISTICS (by percentage point change)

Information Sources Used to Plan Trip		2015 (Percent)	2016 (Percent)	% Point Change ² (Points)
	Airline	51.5	52.9	1.4
	Online Travel Agency	32.2	33.2	1.0
	Personal Recommendation	20.4	22.0	1.6
	Travel Agency Office	16.7	16.5	-0.2
	Corporate Travel Department	9.0	7.9	-1.1
	Tour Operator/Travel Club	7.7	7.5	-0.2
	Travel Guides	7.0	7.4	0.4
	National/State/City Travel Office	4.1	4.0	-0.1
	Other	6.7	5.8	-0.9

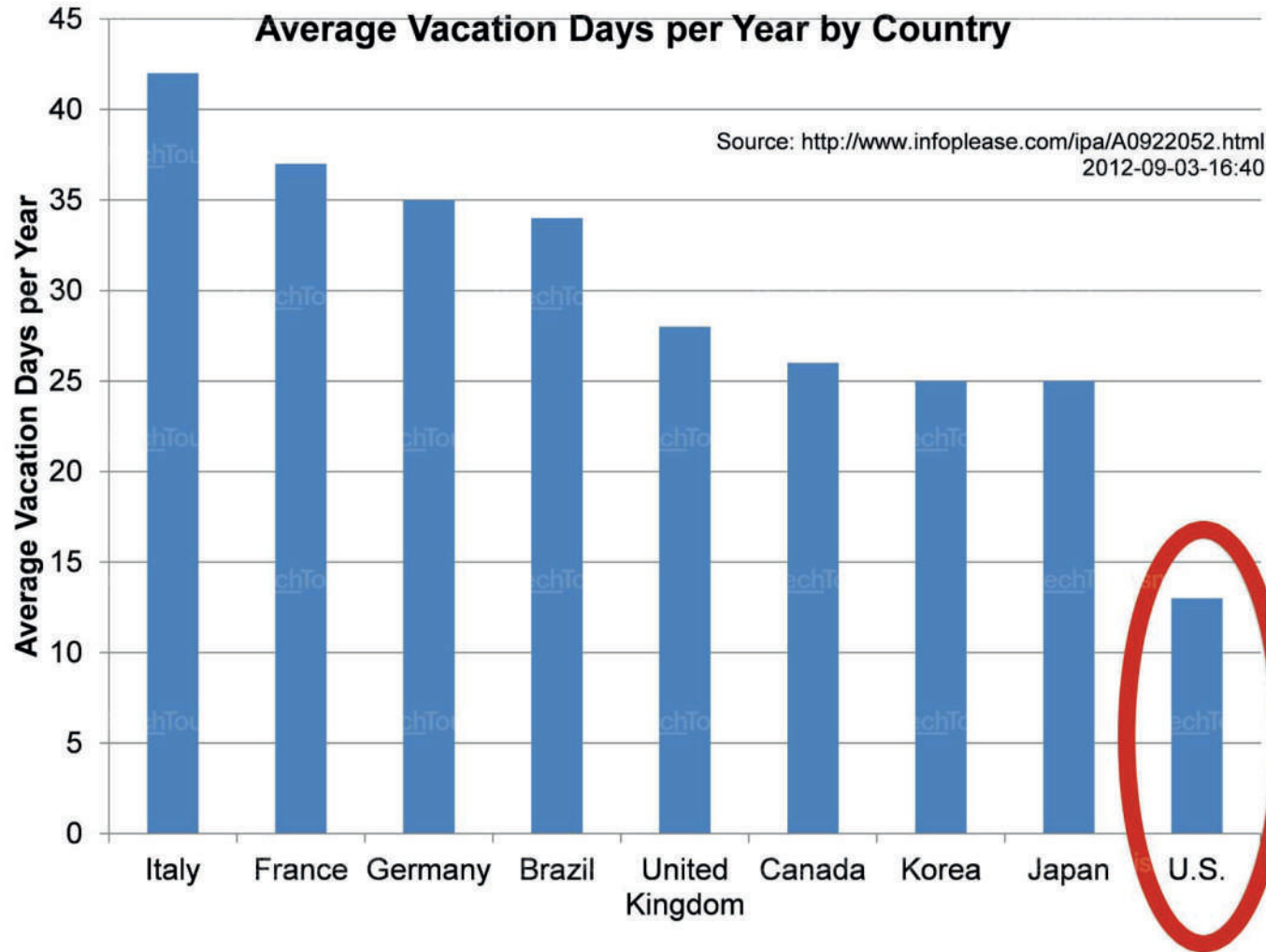
Main Purpose of Trip		2015 (Percent)	2016 (Percent)	% Point Change ² (Points)
	Vacation/Holiday	52.8	54.7	1.9
	Visit Friends/Relatives	26.9	27.4	0.5
	Business	9.6	8.0	-1.6
	Education	4.3	4.3	0.0
	Convention/Conference/Trade Show	2.9	2.7	-0.2
	Religion/Pilgrimage	2.1	1.7	-0.4
	Health Treatment	0.6	0.5	-0.1
	Other	0.7	0.7	0.0

Residence of the U.S. traveler

Residence of U.S. Travelers ⁴	Market Share 2013 (Percent)	Volume 2013 (000)	Market Share 2014 (Percent)	Volume 2014 (000)
REGIONS				
MIDDLE ATLANTIC	21.9	2,199	20.0	2,161
SOUTH ATLANTIC	20.6	2,068	19.6	2,118
PACIFIC	16.6	1,667	17.9	1,934
EAST NORTH CENTRAL	9.6	964	11.3	1,221
WEST SOUTH CENTRAL	11.0	1,104	9.4	1,016
NEW ENGLAND	4.7	472	8.4	908
MOUNTAIN	6.7	673	5.7	616
WEST NORTH CENTRAL	6.1	612	4.7	508
CITIES				
New York City	9.0	904	8.2	886
Los Angeles	**	**	4.5	486
Washington, D.C.	**	**	3.2	346
Houston	3.3	331	2.8	303
Philadelphia	3.4	341	**	**

source: U.S. Department of Commerce, International Trade Administration

LIMITED VACATION DAYS



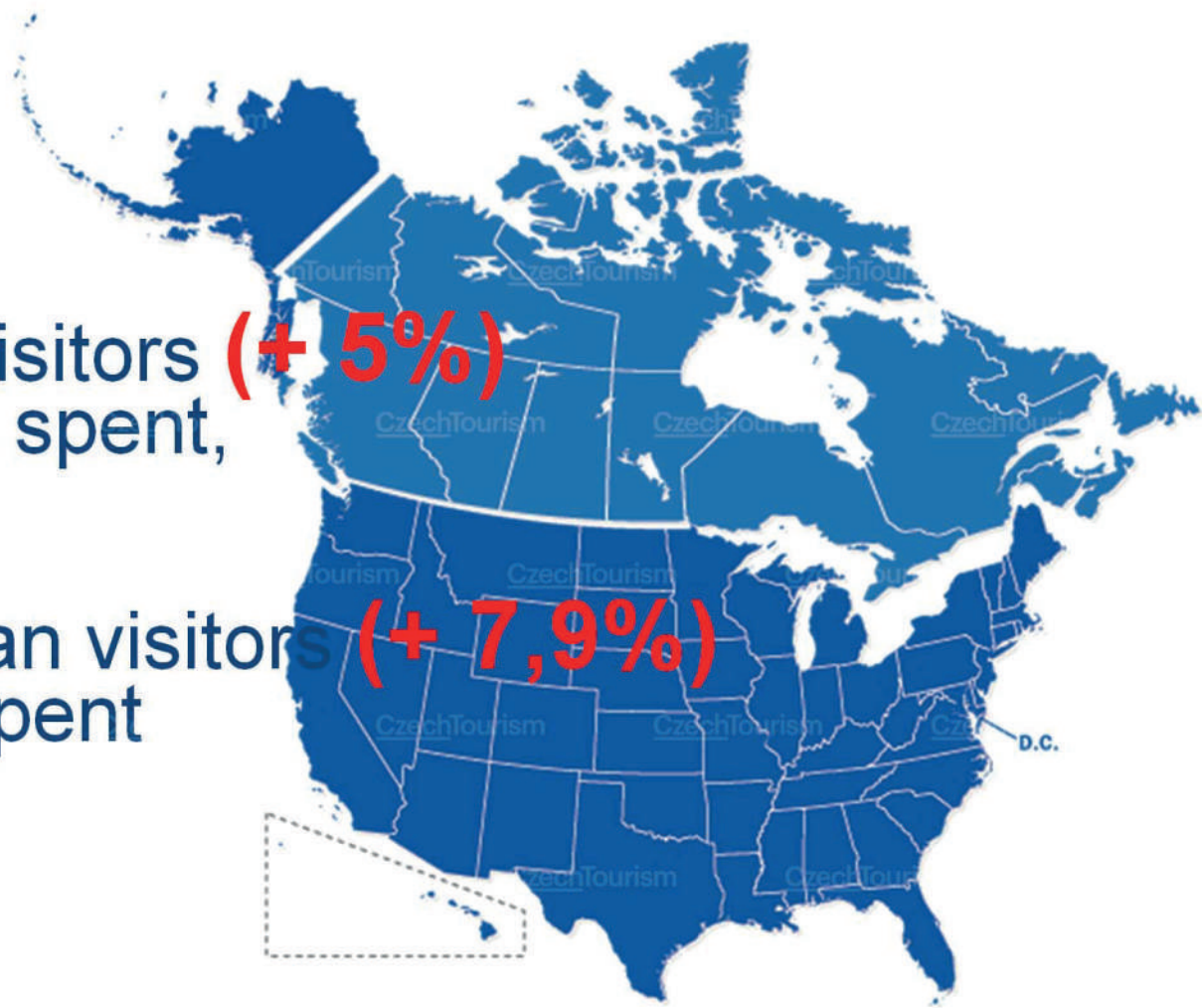


**U.S. is the 5th largest inbound market
Canada is one of the fastest growing ones**

U.S. & Canadian visitors in the Czech Republic in 2017

539,023 U.S. visitors **(+ 5%)**
1,309,002 nights spent,
3.4 days

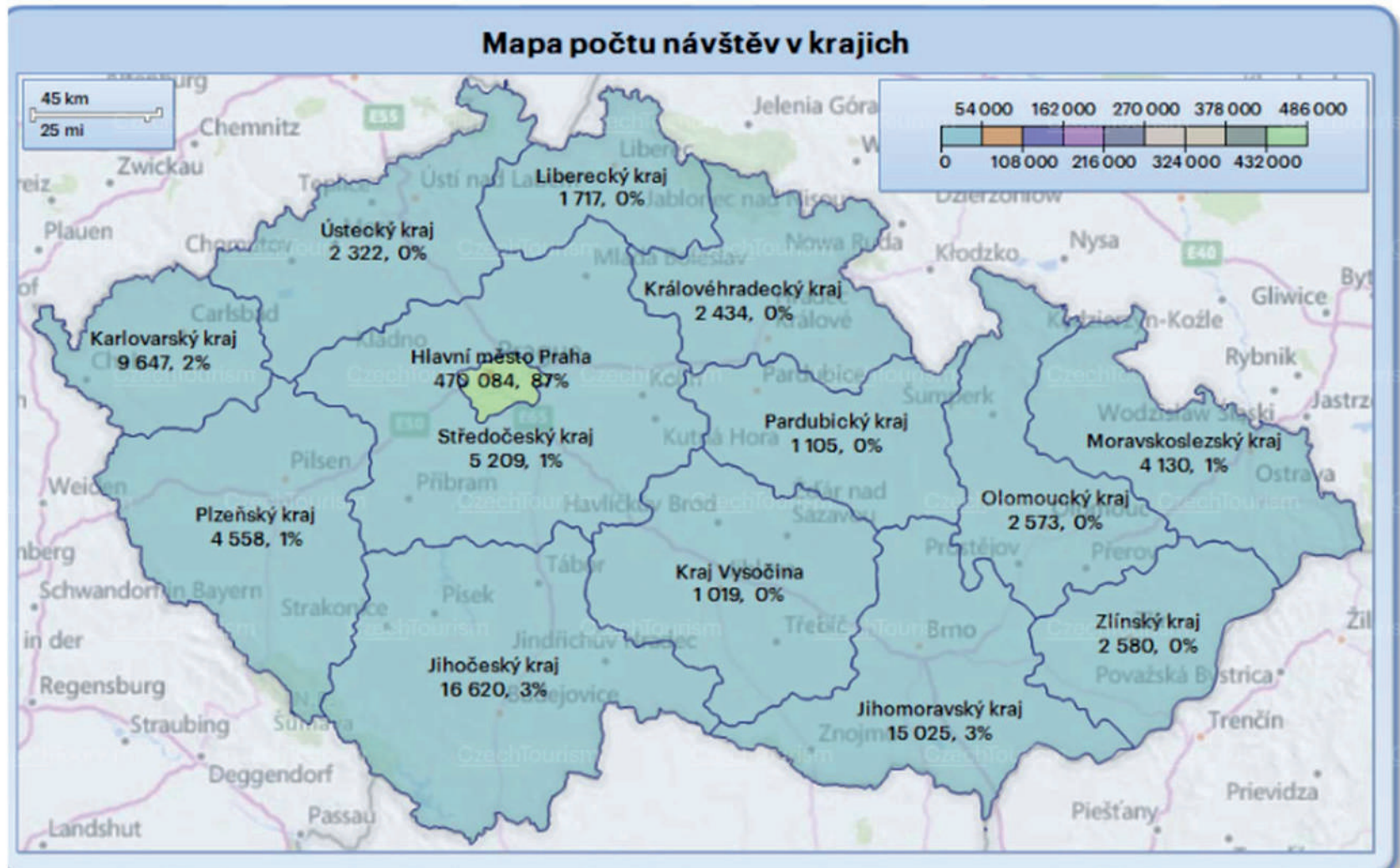
94,336 Canadian visitors **(+ 7,9%)**
242,043 nights spent
3.6 days



source: Czech Statistical Office

CzechTourism

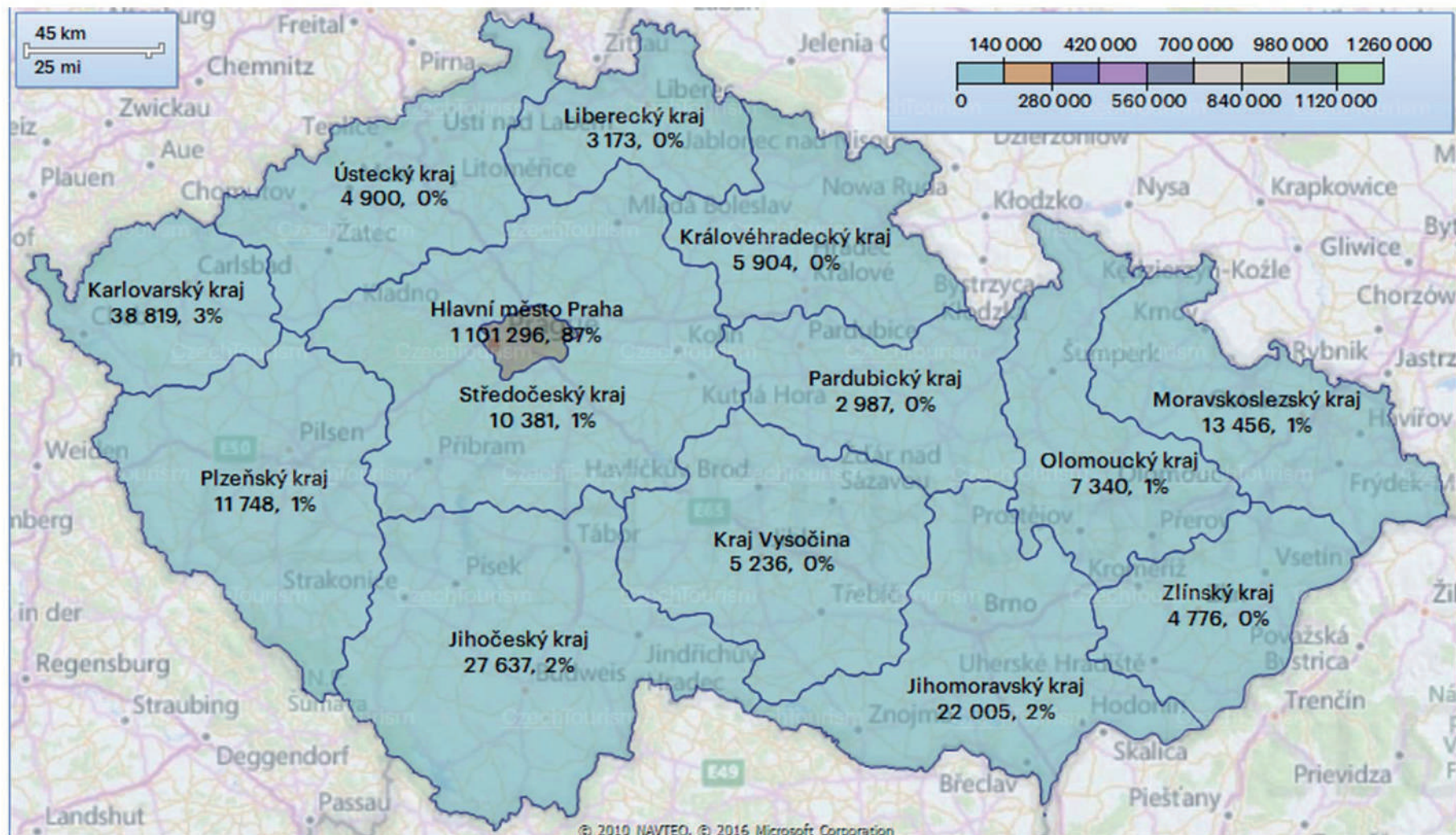
U.S. visitors in Czech regions



source: Czech Statistical Office

CzechTourism

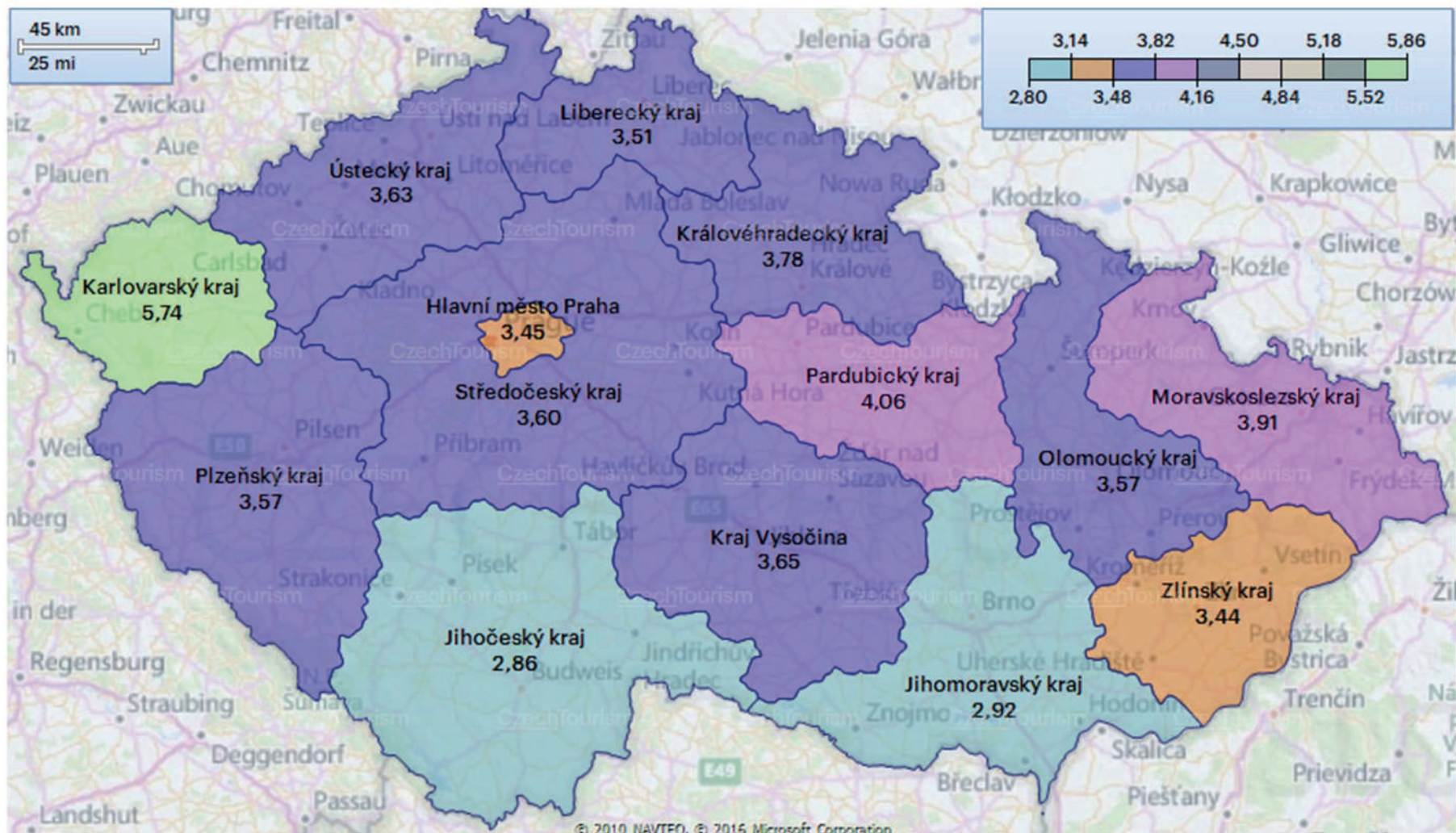
Nights spent in Czech regions



source: Czech Statistical Office

CzechTourism

Average length of stay in Czech regions



source: Czech Statistical Office

CzechTourism

US visitor to the Czech Republic

- Spends on average 4,700 crowns/ day (almost double)
- Over 40% of visitors stay in 4 and 5 star hotels
- Mostly FITs
- Spends 3,4 days in the Czech Republic
- 86% stay in Prague only
- Love dining, shopping and sightseeing

USA Travel Trade

Wholesalers (TO and OTAs)

- USTOA – United States TO Association
- Niche operators (NTA)
- Destinations are interesting, but they want us to help create the demand \$\$\$\$\$\$
- How to reach them? Identify the decision maker/ product developer

Retail travel trade (travel agents)

- 1/3 of USA travel market
- 85 % consolidated in consortia – Virtuoso, Ensemble, Signature, Travel Leaders
- What do they want?
Marketing tools – fam trips, leads, content, webinars

Working with tour operators

7 

How many continents travelers can experience through specialized tours and packages provided by USTOA Active members.

Nearly 8 Million

The number of consumers who traveled with USTOA Active Members in 2014.

4 Million

The number of travel packages sold by USTOA Active Members in 2014.

The amount of revenue contributed to the U.S. tour operator industry in 2014.

\$13.5 Billion

160+

The number of tour operator brands represented by USTOA Active Members.

52

The total of Active Member companies (U.S. Tour Operators) belonging to USTOA.

1972

The year USTOA was founded.

**INTEGRITY
IN TOURISM** **USTOA**
United States Tour Operators Association

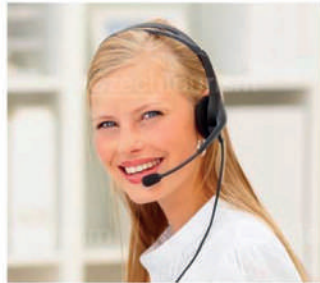
Working with travel agents



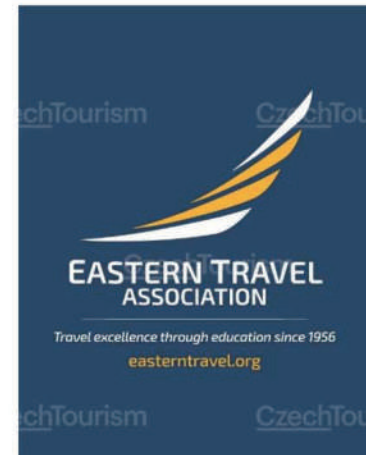
TOURISM INDUSTRY YESTERDAY



TOURISM INDUSTRY TODAY



Working with tour operators and retail travel trade



New trends?

MILLENNIALS USE TRAVEL AGENTS!



MULTIPLE GENERATIONS NOW TRAVEL TOGETHER



MULTIGENERATIONAL TRAVEL

50%

of grandparents
took at least one
trip with their
grandchildren
in the past
12 months

Americans buy experiences – authentic experiences!

- Backstage, private tours
- Cooking classes, wine tasting
- Visit to local homes
- Access to special events, concerts, performances
- Connection to local community, sustainability

**What are we
working on?
Who are we
working with?**

Direct flights in 2018/2019



New York (JFK)



Philadelphia



Montreal



Toronto

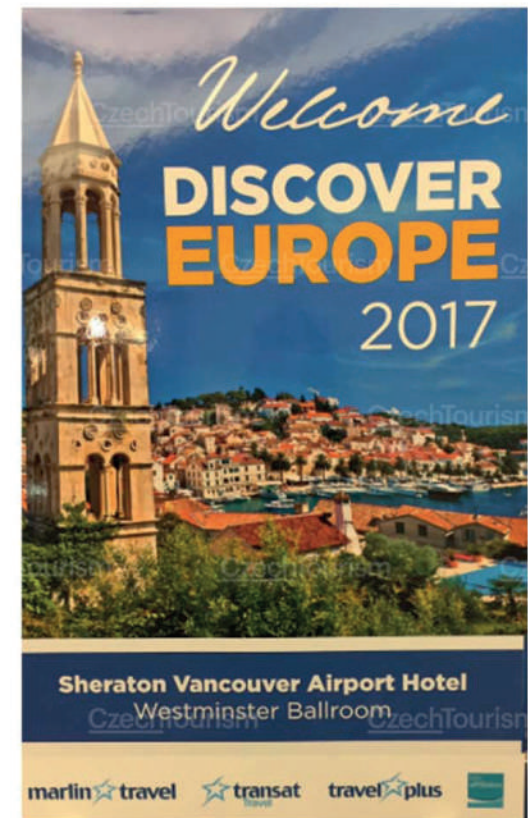
Activities with Air Transat



- OOH in one of the largest malls in Montreal for one month, over 2 500.000 impressions.
- Destination training for over 150 agents in Edmonton and Vancouver



CzechTourism



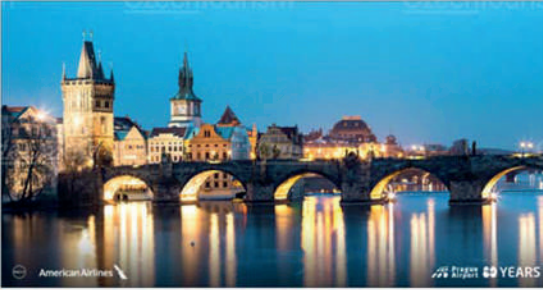
Activities with American Airlines

- New non-stop flights from Philadelphia to Prague
- Daily frequency, seasonal (May – October)
- Prague promoted through OOH, print advertising and influencers' campaign, social media



American Airlines
Sponsored · Like Page

Fly nonstop on our new route from Philly to Prague, beginning May 4.




Nonstop flights to Prague.

AA.COM Top 7 INCREDIBLE Travel Destinations of 2018 | Where to Travel This Year!

41 Reactions · 2 Comments · 454,163 views

Like Comment



 Erik Conover
Published on Dec 3, 2017

The top Travel Destinations of 2018! A list of where you NEED to travel in 2018! I share with you the best World travel destinations of 2018.

Ever since Charles IV, the 14th-century King of Bohemia and Holy Roman Emperor made Prague his pet project, the city has attracted a succession of show-stopping architects who have built extravagant marvels such as the Gothic St. Vitus Cathedral and the neo-Renaissance National Theater by the river.

This is a place to gawk while walking along cobblestone alleys, ideally not on a motor vehicle (Segways were banned in 2016, and locals still grumble about scooters), a district so evocative that you can forgive the fact that there's one too many Irish and a few too many tour groups moving en masse between St. Nicholas Church and the Astronomical Clock.

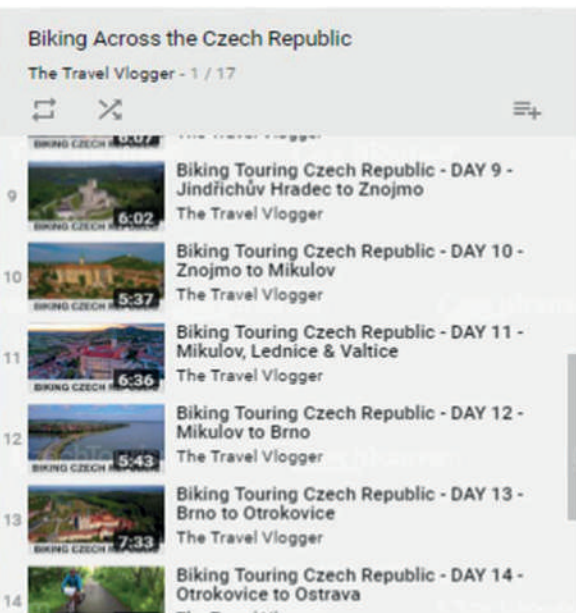
I'm staying a selfie stick's-throw away from the clock at the Grand Hotel Praha, in Old Town Square, where the service is on the austere side, the decor tends toward kitsch and it takes about five minutes roaming through dark hallways to find my cavernous, spooky room. It's perfect.



Naše maso butchers at work.

It is possible to escape the crowds in Prague 1. If you walk in any direction from the Old Town Square, the souvenir shops selling absinthe and Matryoshka dolls thin out. Across the Charles Bridge, northwest toward the castle or south past the graffitied John Lennon Wall, the streets become quieter, giving way to a more neighborhood feel.

That evening, I head to Kávarna Mlýnská, a cafe-bar in a former mill on Kampa Island, on the river's west side, which is reached via a tiny wooden bridge, past a gently rotating waterwheel. It's said to be the social center of literary and artistic Prague, and its most famous regular is David Černý, the enfant terrible of Czech art, who managed to offend even the art world when he pickled a lifelike statue of Saddam Hussein in 2005.



- Travel Vlogger Brian Cox biked 700 km in 14 days across the Czech Republic
- Series of 14 videos, day by day itinerary, available to download
- B2C and B2B presentations and events: NY Times Travel Show, media workshops and PR campaign





SATW is a professional association made up of 1,100 writers, photographers, editors, broadcast/video/film producers, bloggers, website owners, public relations experts and hospitality industry representatives from the United States and Canada.

SATW members represent some of the most influential content producers in the travel industry with work that can be seen throughout all print, digital and broadcast platforms.

SATW is comprised of four geographical chapters (Eastern states, Central states, Western states and Canadian) and three industry councils (Freelance, Associates and Editors). Brno was visited by 57 travel writers.

Czech Republic
Land of Stories

South Moravia



Outlets represented in Brno conference:

National Geographic Traveler

Travel and Leisure

Dallas Morning News

San Francisco Chronicle

USA Today

Wine Spectator

Napa Valley Register

Global Traveler

Travel Weekly

Professional Photography Magazine

Santa Rosa Press

LA Times

Popular Photography



Schedule of the SATW conference

May 9 -10	May 10	May 11	May 12	May 13	May 14-15
Pre-tour in Prague	Photographers shoot-out in Brno Chapter Board Meeting in Brno Holiday Inn Opening reception	Professional Development Sessions Welcome lunch Marketplace	Professional Development Sessions Luncheon Half-day tours	Full-day tours in Brno and South Moravia	Post-tours in South Moravia



CzechTourism



Moravian-Silesian
Region

OSTRAVA!!!



TBEX Europe 2018

Ostrava, Czech Republic

July 26 – 28, 2018

Post FAM Tours

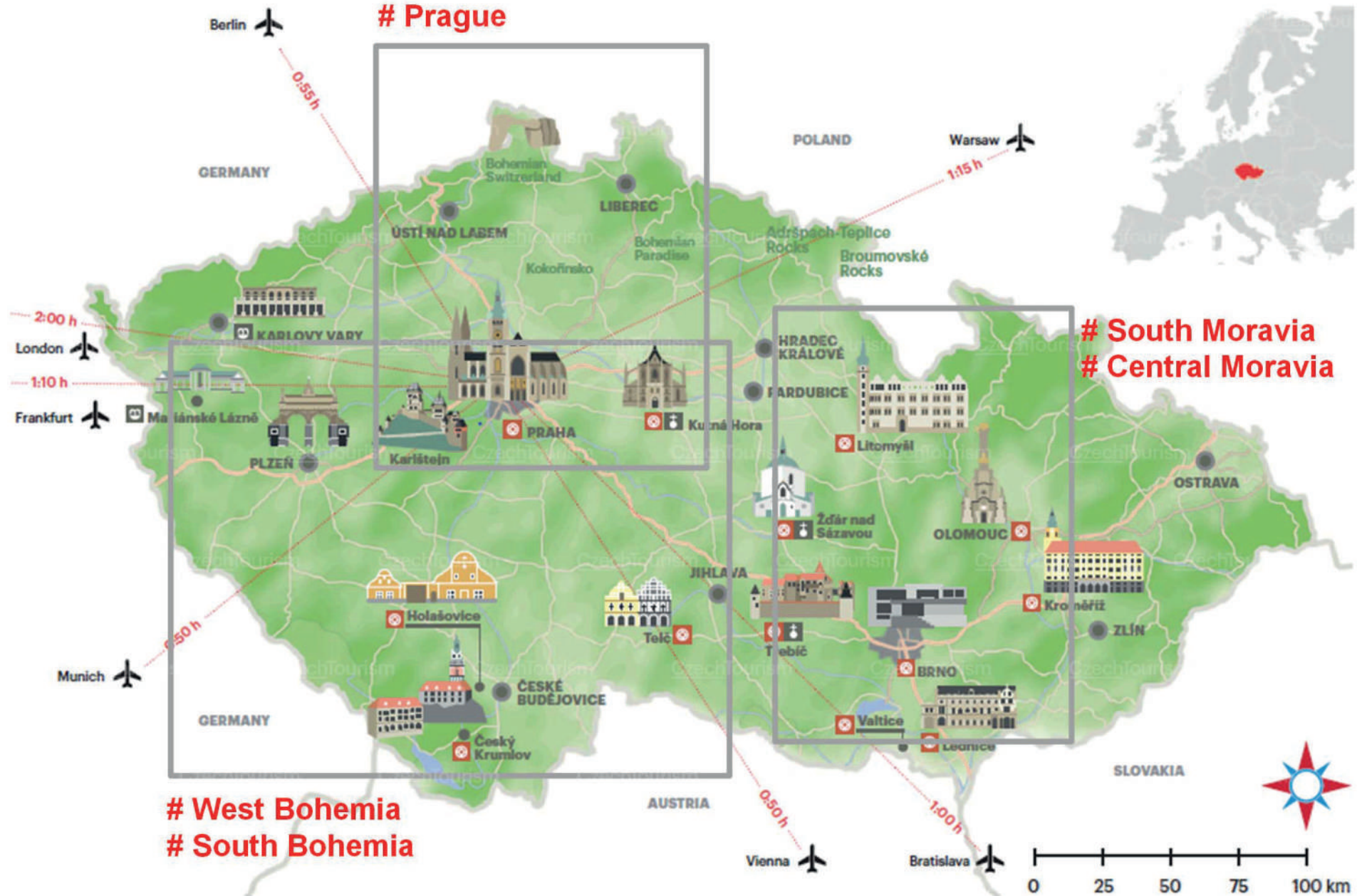
July 29 – August 4

CzechRepublic
Land of Stories

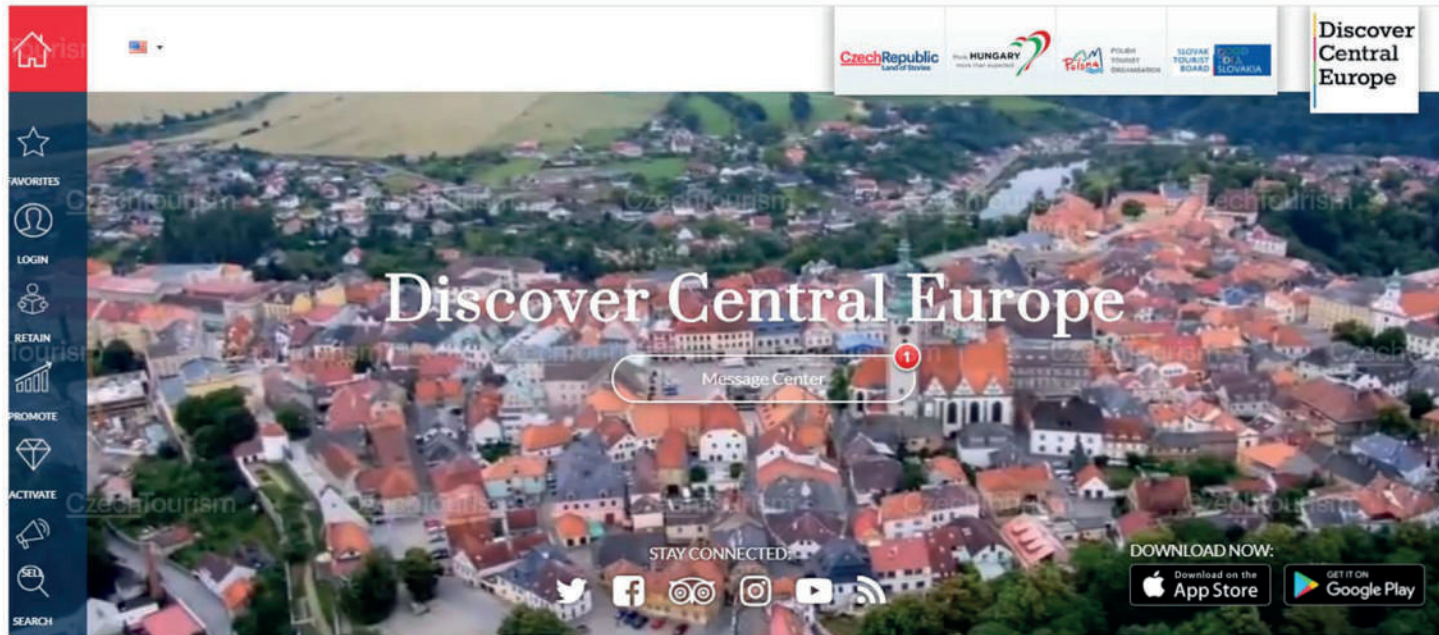
- # South Moravia
- # Central Moravia
- # Central Bohemia
- # North Bohemia
- # West Bohemia
- # South Bohemia
- # Prague

*Tours will combine a variety of day tours
with overnight in the regions*

Central Bohemia
North Bohemia
Prague



V4 - Brand new Destination Specialist Program & Virtuoso membership



CzechTourism



VIRTUOSO[®]
SPECIALISTS IN THE ART OF TRAVEL

FINAL RECAP: Importance of the U.S. & Canada markets

- ✓ High spend
- ✓ Large market share (10%)
- ✓ Good tourers, seasonal spread
- ✓ High users of paid accommodation & visitor services, customized itineraries
- ✓ For business development- personal contact is a must, nobody will start a partnership by email



Q & A

Michaela Claudino
director at CzechTourism USA & Canada

CzechTourism

109 Madison Avenue,
New York, NY 10028
phone +1 (212) 288-0830
claudino@czechtourism.com
www.czechtourism.com

#Visitczechrepublic
www.czechtourism.com