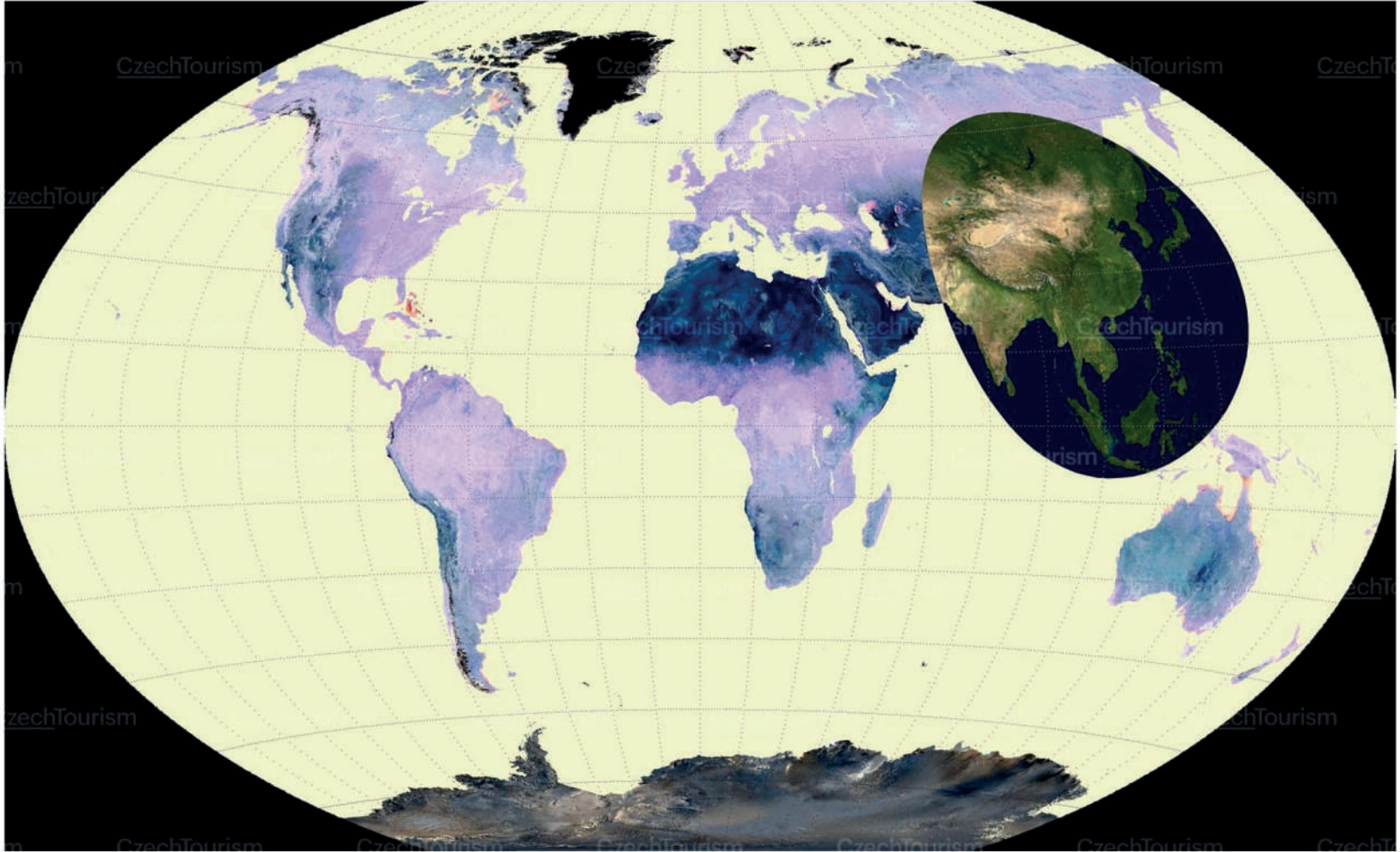


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ZDROJOVÝ TRH:
Jihovýchodní Asie

Jan Urban
Ředitel ZZ Hong Kong

28.06.2018



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Southeast Asia

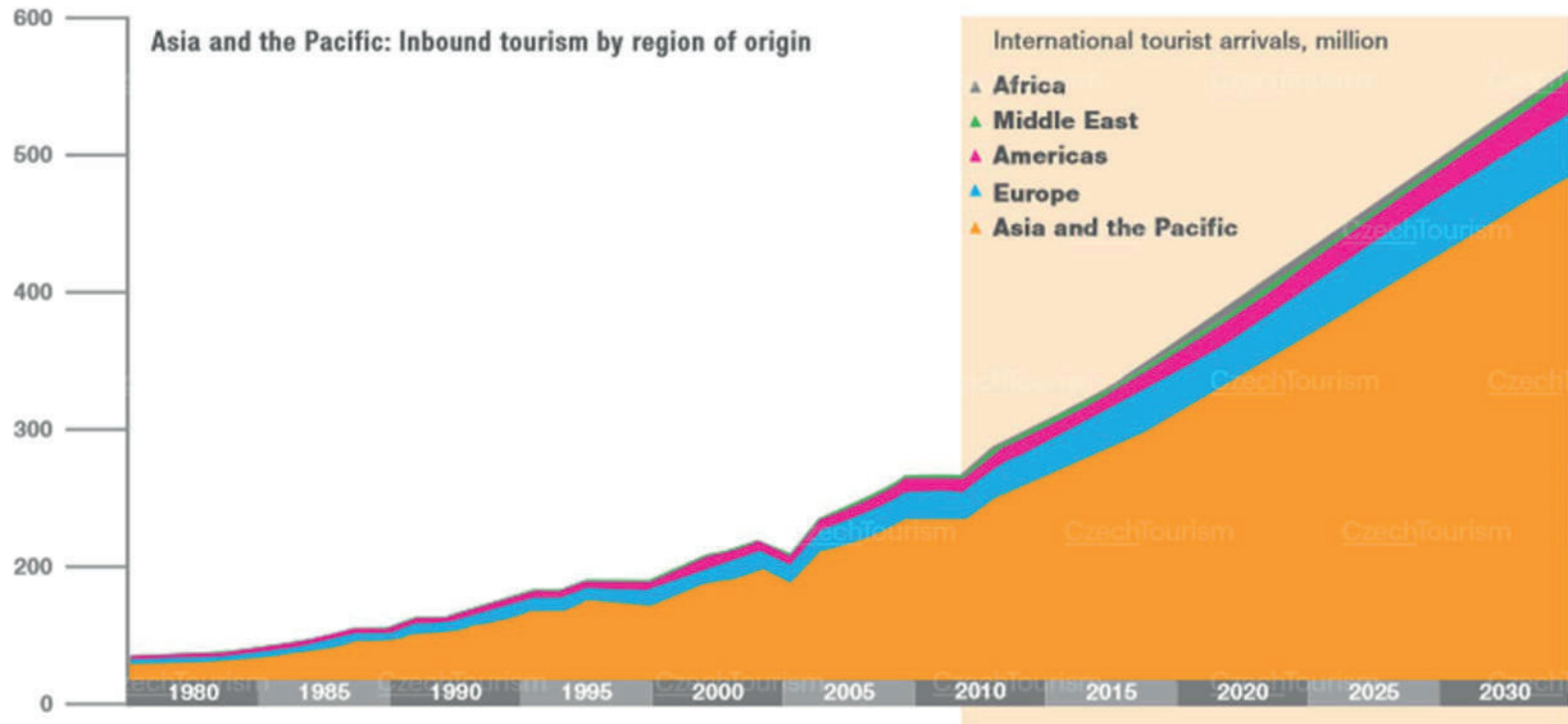


- Thailand
- Malaysia
- Indonesia
- Singapore
- Philippines

SE Asia – growth driven by middle class

- UNWTO: 2,1 bil people are of middle class status
 - 750 mil is from this region (30 percent)
 - Increase to 3.4 bil within next 20 years
 - Asia: 400% increase, 60% of whole world
- Outbound: 190 mil is from SEA
 - By 2020 more than 400 mil from SEA
- Bamboo network
- Airtraffic boom
 - LCCs
 - Long haul: decline in traditional carriers numbers is illusory: growth of middle east airlines

ASIA: once tertiary market, today growth generator



Source: © World Tourism Organisation (UNWTO)

Figure 1: Mr. Márcio Favilla L. de Paula, Executive Director of Competitiveness and External Relations and Partnerships, World Tourism Organisation (UNWTO), shared the above industry trajectory at ITB Asia, a key event under TravelRave. Asia Pacific will continue to grow considerably in both inbound and outbound travel, with most arrivals expected to be intra-regional.

Inbound methodology

- Lack of accurate figures
- Inbound under “Rest of Asia:
- Year 2016:
 - Total of 259 034 (+12.2 % Y2Y)
 - Average length of stay: 3,6 day
 - Total overnights: 680 247

Historically

Malaysia:

- Middle Income Country, newly industrialized, never became Asian Tiger

Thailand:

Higher numbers both economically and inbound wise

- Often slowed down by political instability or natural disasters

Indonesia

- Biggest country, fastest growth, but prosperity only came late with the democratisation of the country
- 50x bigger market than SGP, 8 x Malaysia:
 - Will be dominant into the future

Average Tourist – similar trends

- Most label-conscious consumers in the world
- 3 out of 5 willing to pay more for brand goods
- Shoppers**, early adopters
 - Huge popularity of pay cards and credit cards, eCommerce: Singapore, Malaysia, Thailand, Indonesia however less
- Consumer behavior**: hunt for value
- Internet**: most of population who can afford travelling is connected
 - Mobile
 - booking
 - Social Media
- Travels planned around holidays, maximize the leave

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Thailand



GDP per capita: USD 15 319

PPP/ USD 5771 Nominal

Gini: 48

Unemployment: 0,9

Inflation: 3,02

Population: 67,2 mil

Outbound: 6 milion, 4,4%
(21:79 Business/leisure)

Outbound to CR: No exact
number, numbers under
Asia, roughly 50000/year

Bangkok (8,3 mil),
Central: 18,8

VISA

Thailand - tourist

-Motivation:

- Seeking for **tradition and experience** cannot get at home

-Main criteria for destination selection:

- **Good Attractions**

- Attractions as a part of „bucket list“ (travelers would share information with family and friends – bandwagon)

- **Budget**

- Maximise Value (not only financial value – shared moments and experience)

- **Offers good shopping**

- VFR

- Accessibility, hygiene, safety

-Travelling in larger groups with family and friends

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THAILAND: Tourists

Age 30 – 39, often public servant, business man/entrepreneur, university education
Mainly Bangkok

Income: 40-70k baht

Expect spend in Europe: 50k baht/pax
(except ticket)

In Europe 1-3 weeks, 3-4*

Financially: main consideration is ticket
and accommodation

Trip planning 1-3 month before departure

Before coming to Europe they would do 1-3 trip
abroad already

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THAILAND: Product promotion

- Source of information:
 - WOM: In over 57% cases Thais would contact family or friends while searching for information
 - Next TOs (27,5%) followed by Online (18,5)
- Booking: agent: short haul cca 50%, Long Haul cca 70%
- Online: Tripadvisor, pantip.comsanook.com, Mthai.com, social network (FB – following friends)

Topics: transport, must-eats, weather, tax free

While travelling: 54% tour leader/guide, brochures, 43% maps

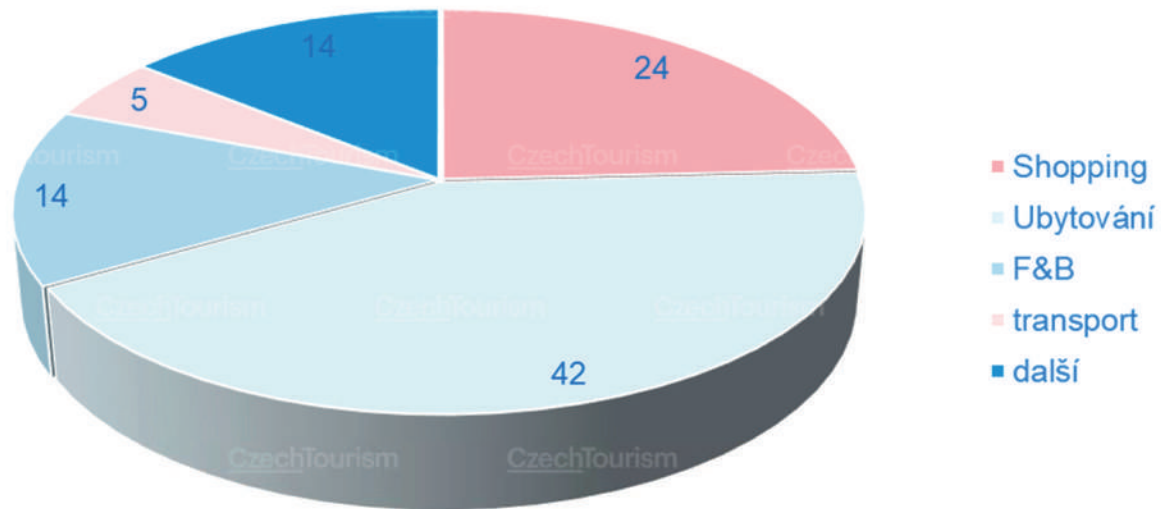
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Consumer behavior

- Planning 3 months before departure

Thai tourist spending behavior



Malaysia



GDP per capita:
USD 25833 PPP (45) /
USD 12127 nominal
Gini: 43,1,
Unemployment.: 3,1,
Inflation: 3,3

Population: 29,5 mil
(60,3 % malay, 22,9%
chinese, 7,1% indian)

Outbound: 2014: 10,9 mil
(+5.7, excl cross border SIN)

Outbound to CR: cca
35000/year



Centers: KL, Selangor, Johor,
Sabah
NO VISA

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Malaysia – market performance

2012: 1,1 Bn USD total

2020: 2,0 – 2,5 Bn USD

Out of region (except SEA and Middle East):
1,5 mil (2002) to 3,4 mil (2012),
7 percent annualy

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Award-winning Malaysian songwriter **Shah Shamsul** constantly draws inspiration for his masterpieces from his many trips around the world. Fresh from a trip to Central Europe, he shares his memories of the historical and fairy-tale-like city of Prague.

Despite being nestled in a hilly, hazy, almost medieval setting, Prague is the Czech Republic's most accessible city with the most frequented Western European capitals such as London, Paris or Amsterdam. Prague is often said to be one of the most beautiful European cities. It is also one of the most beautiful European cities.

After making the decision to visit Prague during the late-summer season, I got introduced to Czech tourism officials for their assistance in providing me and my friend with a private tour of the



Malaysia - Tourist

•Push factors:

- Leave stereotype, meet new cultures, meet new gastronomy

•Main criteria:

- budget and special offers: tickets – Malaysians plan early – 6-4 before leave
- LCCs: Malaysians base to major LCCs with base in KLIA2

•Combination of **sights and gastro tours** (experience local specialties)

Length of stay: about **2 week**, split into couple of countries

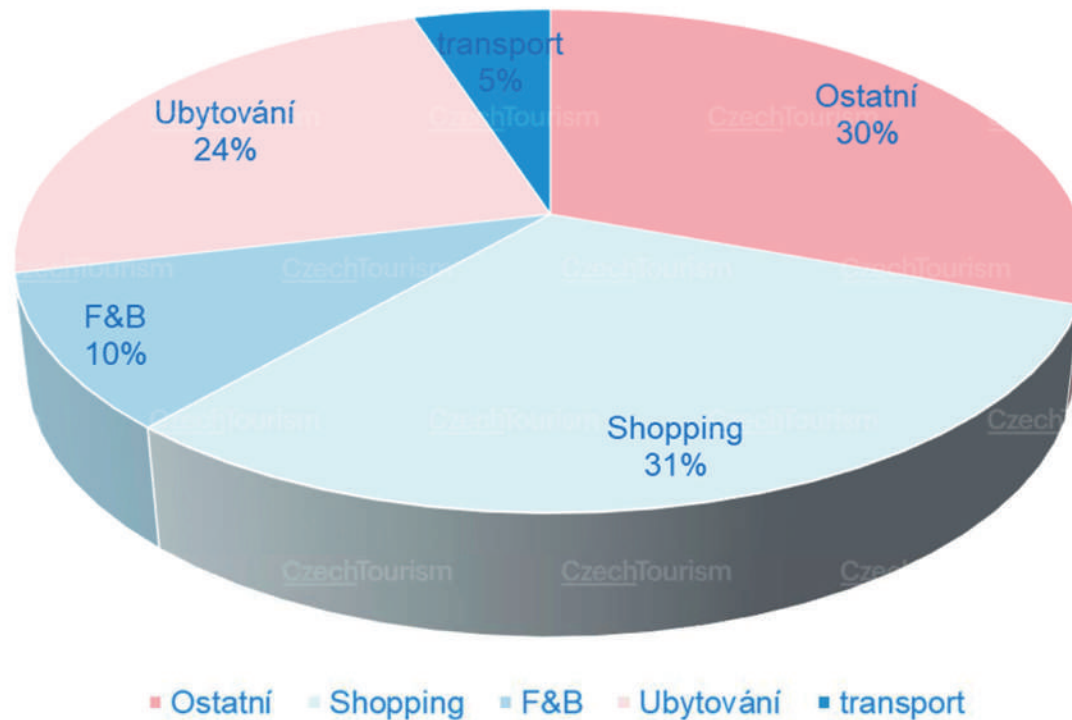
- Considering its Asian country quite a lot of holidays: 16 day federal + 16 day state

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Consumer behavior

Savvy travelers: not necessary cheapest, but best value

Malaysian tourist spend



Malaysia - Tourist

- Generally travel in **larger groups, wide families**
 - Chinese vs Malay (muslim) vs Indian
- **Active, curious** tourist
- Muslim population request **halal food** and prayer rooms while travelling (transfers!!)

Agents: usually used by older generation and premium segment

Important for:

- Long haul destination
- language barrier
- avoidance of possible trouble, smooth of travel, fears etc

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Internet – product promotion

- Mobile phone penetration is 142.5%
- 19,2 million internet user, penetration of over 60%, 81% population soc net
- **Online booking** – very popular,
 - Even while travelling, 3 out of 4 Malaysians use booking apps

INTERNET: generally ideas and planning

- 51% use social networks for self education on destination
 - (44% activities, 44% attractions, 39% accomodation, 36% restaurants)



www.czechtourism.com
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