



# **GCC Market Overview**

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The GCC has the fastest growing population in the world. The vast majority will be under 25 years of age



The trend of more women entering the workforce is likely to continue



Spending on education is rising across the GCC and there is an increasing focus on the quality of education



The affluence, economic diversification and abundant natural resources, point to a continued strong growth.



GCC travelers spend **6.5x** more than the global average



**40%** of the GCC travelers spent over **USD10K** on their last trip to Europe



The GCC accounts for 64% of total international departures from Middle East



Travelers from Saudi are said to be the **highest travel spenders** globally



Qatar has the **highest tourism** per capita expenditure followed by Kuwait and UAE in the GCC

#### **GCC Outbound Tourism Overview**



# SAUDI ARABIA OMAN BAHRAIN KUWAIT UAE QATAR 30% 40.8% 54% 70% 88.52% 89.5%

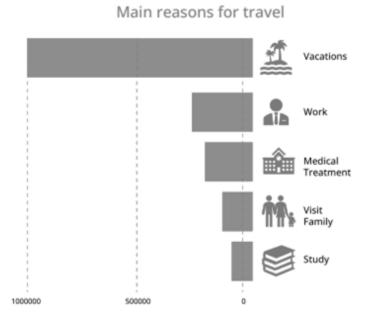


#### **GCC Traveller – Notable traits**





#### GCC Traveller – Reasons to travel



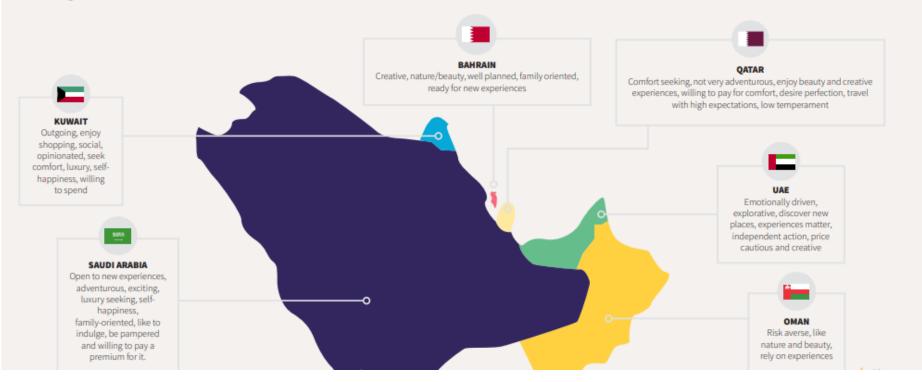
#### Main seasons for travel





Booking Preference 38% people search and book from app

# Key elements for travellers from each of the markets





### Ideal Consumer target segments in the GCC



Arab Locals

- Prefers Luxury, high-end travel and convenience
- Safety and security is the main factor for choosing travel destination
- High spending capacity
- Highly influenced by family, word of mouth, social media and popular trends while choosing a destination



**Expats** 

- Seeking new international destinations
- Opportunities for experiential travel
- Highly influenced by travel package pricing, promotions and social media trends while choosing a destination

#### **GCC** traveller segments



Family travelers: Middle East travelers like to take at least one trip every year as a family, if not more. Often, family travel includes not only one's family but is rather more multi-generational, including grandparents, cousins, and siblings. Though bookings are often made for each of these family units separately, they all meet at the destination and stay together.



**Weekend travelers**: These are more frequent travelers and use every long weekend opportunity to travel and explore destinations at shorter distances. They are looking for a quick break from the routine & mundane of life. They travel with their families or friends and enjoy nightlife, sightseeing, and indulging in shopping.



**Niche**: These travel for sports, adventure, events and festivals and Czech Republic is the perfect match offering all these experiences. These travel to either participate or attend a specific event or activity such as a sports tournament, music festival, art exhibition etc.



**Residents:** These are individuals who are citizens of other counties who reside & work in Dubai, they travel for various reasons and a major large segments of the UAE population. They travel for business, weekend trips, sports, events etc.



#### **Travel Trends 2023**

- Growth in outdoor and nature travel
- More Focus on Safety and Security
- Set- Jetters
- Extended WFH Stays
- Family Travel
- Sustainable and conservative travel
- Wellness and Spa Tourism
- Revenge travel
- Solo travel

#### **Best potential customer segments for Europe**

- Led by GCC nationals and expat travellers
- Family travellers; 35-54 years
- Millennial travellers; 18-34 years

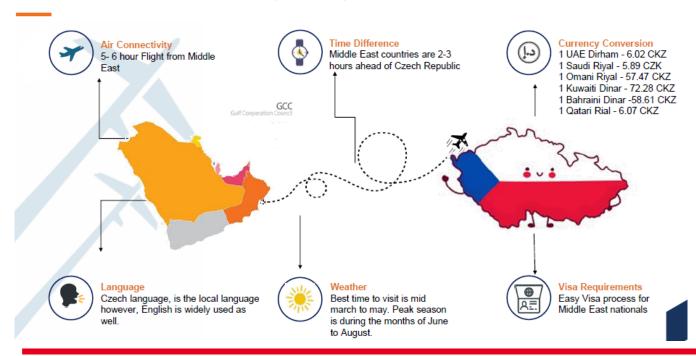






#### **Czech Republic for GCC Travellers**

In 2019, **57,859** GCC travelers visited the Czech Republic from UAE and Saudi Arabia for an average length of 3-4 days and Saudi Arabia having the highest length of days being 7-8 days. Travel from Saudi Arabia to the Czech Republic has seen a surge in 2021 with a year on year increase of 182% in the average no. of nights over 2020.





#### **Airline Connectivity**

Czech Republic is connected very well in the GCC region through main local airlines

- Emirates Airline
- Qatar Airways
- Flynas
- Air Arabia
- Jazeera
- Flydubai
- Smartwings
- Salam Air



# **Key Products promoted in the GCC**

- Spa & Wellness
- Adventure & Outdoor
- Family Holiday
- Shopping
- MICE
- Niche experiences Golf
- Christmas Markets
- Winter Activities



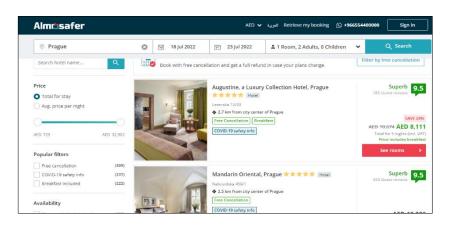


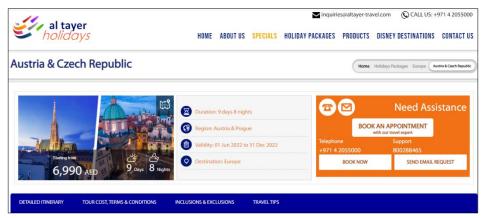


# Key packages promoted in the GCC

- The travel packages for Czech Republic in the market entail operators 5N6D with an approx. cost of AED 8000 9000 wellness packages and 2N3D Central European packages for AED 4000 5000
- Most of the Itineraries include spa regions or the packages are combined as golden triangle with Prague, Budapest and Vienna







### **Strategy to promote Czech Republic in the market**

# Primary Audience

- Family
- Millennials
- Honeymooners
- Wellness



# Secondary Audience

MICE



#### **Strategy to promote Czech Republic in the market**





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#### **Market Development - Trade**



Roadshows

Trade Co-ops

**Trade Fams** 

Trade Workshops

**Destination Training** 



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# **Market Development – Media and PR**



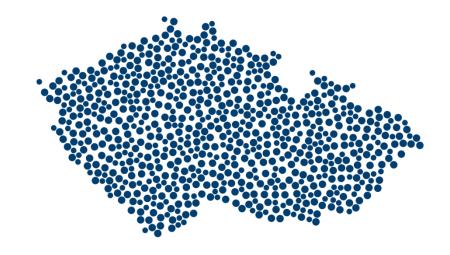












# **Work done in the GCC market- 2022**

# **Trade B2B Networking Events**



Kuwait B2B Workshop in May 2022



Czech Networking Evening at Embassy in Riyadh in May 2022

# Participation in events and trade fairs in UAE & Saudi Arabia







Visit Czech Republic participation at Riyadh Travel Fair 2022

Participation at MALT Congress 2022

# Czech Republic Roadshow 2022- Riyadh, Jeddah, & Al-Khobar





200+ local agents across 3 cities



Visit Czech Republic Roadshow in Saudi Arabia 2022

# Czech Republic digital campaign with Wego- Saudi Arabia & Kuwait







Campaign objective: Create destination awareness and drive bookings to Czech from KSA targeting the winter holidays 2022-23.



# **Familiarization Trips – Trade and Media**



Trade trip with Jazeera Airways – Kuwait



Influencer Trip with Jazeera Airways – Kuwait



Influencer for Traverse – UAE

#### **Social Media handles**



## 1,824 IG followers



















#### **Press Coverage**









Opening the roadshow in Riyadh, Juraj Koudelka, Ambassador of the Czeoh Republic to Saudi Arabia, said:
""We are very excited to be a part of Czeoh Republic Roadshow focusing on Saudi Arabia exclusively this year.





# **Upcoming Activities for 2023**

#### **Dubai Festival City Mall Promotion with Al Rais Travel**

February 2023

#### **Arabian Travel Market**

May 2023

#### MICE Arabia & Luxury Travel Congress (MALT 2023)

September 2023

#### **Riyadh Travel Fair**

Dates TBC

#### **Familiarization Trips**

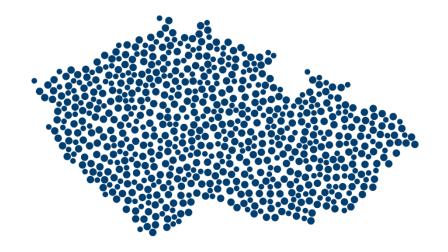
Q3 – Q4 2023 Dates TBC











# **India Market Overview 2022**

#### Socio Economic and Political overview



India, the world's most populous democracy, with roughly one-sixth of the world's total population, India is the second most populous country, after China.



India's GDP grew by 20.1 % in the April - June quarter of the fiscal year 2021-2022



The FDI equity inflow grew by 168 % in the first three months of FY 2021-2022



Indian travelers have accepted the New Normal way of life and are more eager to travel to new destinations

1.39 ద

Billion population

International airports



65% Under the age of 35



27
Million outbound travellers in 2019

90
Million Indian
passport holders

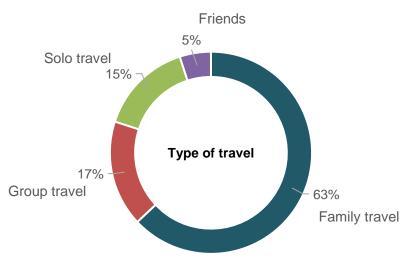
Source: Ministry of External Affairs

**PASSPORT** 

#### India outbound travel market overview

India's outbound tourism market is set to surpass US\$ 40 billion by 2026 with an impressive double-digit growth rate during the forecast period 2021 - 2026.



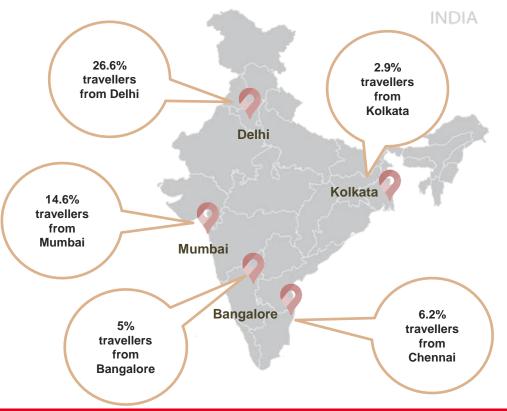


#### India is home to 300K agents

- 750 Large agents with monthly revenue of EUR 1,70,000 EUR 5,70,000
- 60,000 Medium agents with monthly revenue of EUR 28,800 EUR 1,70,000
- 230,000 Small agents with monthly revenue of EUR 1,100 EUR 28,800

# Top contributors to outbound travel - 2021

8.5 M travellers from India 2021



#### A massive pent-up demand of Indians waiting to travel...

Indians, among the most travelled before the COVID-19 pandemic struck, are the most confident in the world about resuming their international adventures once they allowed to do so.

■ ETPrime

Travel demand could rise in India in coming months: report

# Tourism sector rebounds to pre-pandemic levels, here are factors driving growth

# EaseMyTrip clocks record sales as pent-up demand boosts travel agency

Nishant Pitti, chief executive and co-founder of EaseMyTrip, said, "The festive season in India is regarded as one of the busiest travel periods in the world, and we are overwhelmed by the response to the sales."

SHIVANGINI GUPTA | NOVEMBER 01, 2022 / 12:02 PM IST

Strong pent up demand for hotels driving consumption: Crisil

2 min read. Updated: 27 Apr 2022, 11:24 AM IST



#### Travel season – when Indian's like to travel

The non-summer outbound travel is steadily growing



Jan - Mar

50% 10%

Apr - Jun

July - Sep

#### Travel trends to look out for in 2023

Reflecting the great change within the travel industry, we have identified emerging travel styles and segments that will pave the way for the future success for the destination.

**Adventure Travel** 



Solo Travel



**Bleisure Travel** 



**Sustainable Tourism** 



**Culinary Tourism** 



**Cruising Holidays** 



**Wellness Tourism** 





Multi-generational Travel

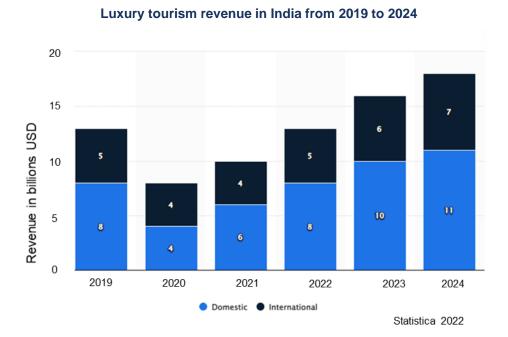


**MICE Tourism** 



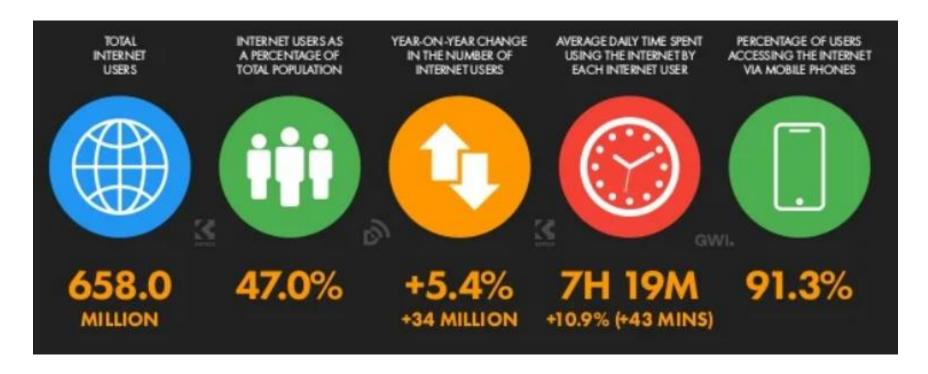
#### India's luxury travel market potential

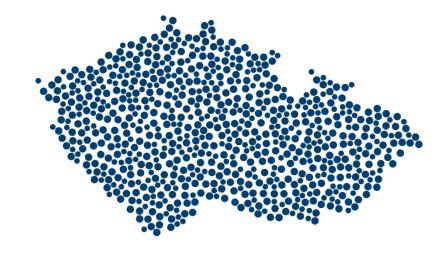
Statistics peg the number of luxury outbound travellers from India at about 3.6 million and growing...



- 65% of Luxury travel queries originate from the cities of Mumbai, Delhi and Bengaluru
- In India Gen X and Boomers are the driving force behind the market growth, however there is an increasing trend of Millennials opting for shorter luxury holidays
- India has great potential for luxury weddings as well as honeymoons, owing to financial dependency on family wealth till much later stages of life
- Affluent Indian consumers remain very upbeat about the future, over 70% believe that their economic well-being, disposable income and wealth will keep growing

#### India's digital wave





## Work done in the India market in 2022

### Czech culinary activity with celebrity foodie

Concept – To bring the local flavors of Czech Republic to India through an online masterclass with celebrity food blogger Kunal Vijayakar.

The idea behind the video was to influence and encourage Indians traveling to the Czech Republic to try the Czech Cuisine.



Easy Chicken Recipe | Czech Republic Recipe Indian Style | Braised Chicken | Kunal Vijayakar













The videos were posted as reels on Kunal Vijayakar's social media handles, along with one complete episode on his YouTube channel





views on social media posts



### **Czech Republic webinar**

Organized and hosted a webinar in association with the Czech Republic embassy in New Delhi in May 2022 to emphasize and disseminate information with the Indian business community regarding the most recent developments pertaining to the visa application and entry procedures.





Mr Roman Masarik
Talking about Czech
Republic for Indian
Travelers.

Mr. Marek Kroutil
Giving the destination
presentation to the trade



Ms Nicole Machova
Sharing updates with the trade on Czech Republic visas.



### WhatsApp promotions to the travel trade fraternity

WhatsApp Groups are a great medium to reach out to many travel agents at once. We would share postcards every month with 10+ groups sharing relevant information and destination updates.









### **Trade and Media meetings**



To stay connected and maintain a relationship with the travel trade fraternity, airlines and media publications in the Indian market, we would on a regular basis have meetings in person or virtually.



### **Social Media handles**



1,987 IG followers

64 posts from Jan 2022 - Jun 2022

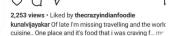
Covering different aspects and offerings of the destination





















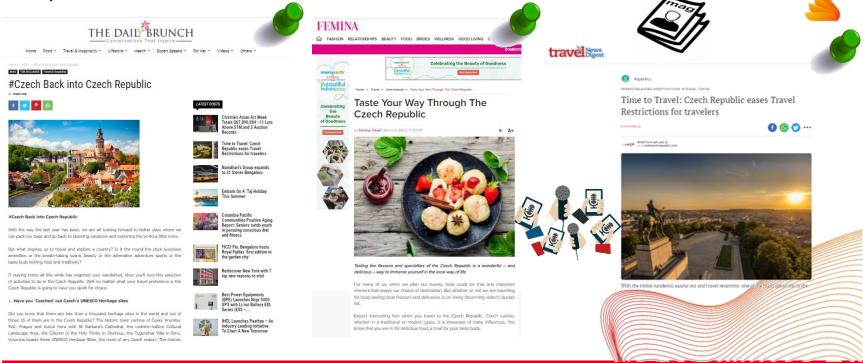




Liked by marek.kroutil and 6 others

#### **Press Releases**

Press Releases and destination updates were drafted and disseminated to media database of 500+ publications on a monthly basis.





### **Press Releases**





jet off to Europe like Parineeti Chopra



Because the 'Metropolis of a Thousand Spires' Prague is one in every of Europe's architectural perio Romaneopue chapels and cellars. Gothic cathedrals, Baroque palaces and gardens, worldly Artwork. Nouveau buildings, and distinctive Cubist structure make it a place with no parallel on this planet. The town has been designated as a UNESCO World Heritage Website, attracting an growing variety of

Press Releases in 2022 :**70+** Print, Online & Newswires



#### CzechTourism along with the Embassy of the Czech Republic hosted their first webinar of 2022.

The CzechTourism India team along with the Embassy of the Czech Republic organized and hosted their first zoom webinar of 2022 titled 'It's time to Czech into Czech again!' to update the Indian travel trade fraternity about the re-opening of the country. With over 250+ participants from across India, the webinar was surely a hit!







Coverage in lifestyle and trade India like magazines Condenast Taveler. Times Travel, BOTT, TTJ, etc.



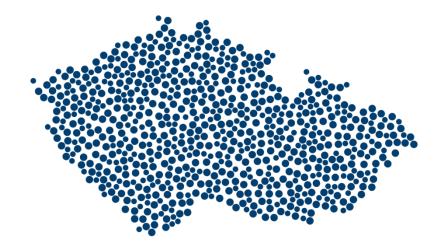




Travellers will no longer need to fill in an arrival form or submit proof of vaccination or a previous infection when returning from abroad. However, it is still recommended travellers to verify the conditions of transport (including proof of infectivity, i.e. test, vaccination, illness) directly with the agreed public transport carrier (plane, bus, train).

Jan Herget, director at CzechTourism, said: 'The Czech Republic has maintained its place in the world's top ten - between Ireland and Canada. This topic is important in the marketing communication of the destination across segments, both towards the tourists themselves and especially at the level of B2B marketing, when it is necessary to assure our partners from large travel



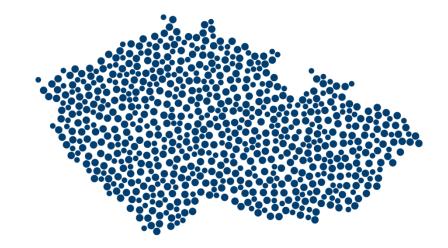


## 2023 activities in India

### India 2023+

- In 2023, CzechTourism will mainly focus on activities leading to the launch of the direct flight to the Czech Republic
- Online campaign to promote the Czech Republic
- Focus on visa issue





# **Israel Market Overview**

### Israel's Market Overview

Italy & Greece

€1000 -€2000

29%

**71%** 

Top international destinations

Spent on an avg. per trip use services of travel agencies

of people organize travel on their own.

7 Million

Israelis are aged 25+ yrs of which

3.6 Million

travel once a year

### Israel's travel booking trends



#### **Peak travel seasons**



Jews celebrate many holidays throughout the year but some stand out in terms of travel

The non-summer outbound travel is steadily growing

**CzechTourism** 

### **Israeli Traveler segments**



Family travel with children are usually made to Europe. These trips last 7-14 days mainly during the spring and summer holidays. A combination of city and nature with attractions for the whole family (parks, beaches, lakes, and rural culture). Rental cars are used to travel outside the big cities.



Concept trips like ski vacations, music performances, sports events, wellness, health (hair implants, thermo baths etc.) Preference for a package that includes flight, hotel and tickets /equipment /quide.



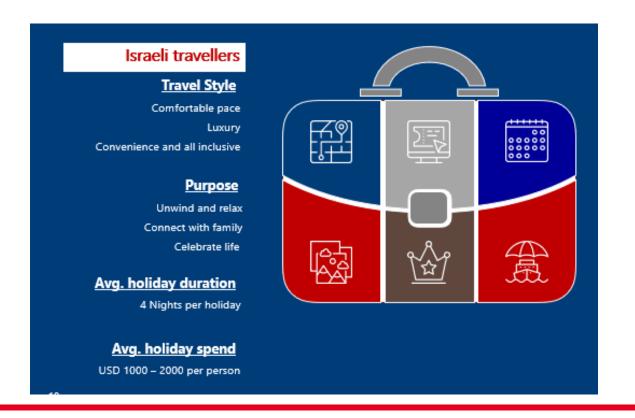
Business travel to meetings, conferences and business relationships. It is usually short trips where the flights and hotels coordination is done through a travel agency

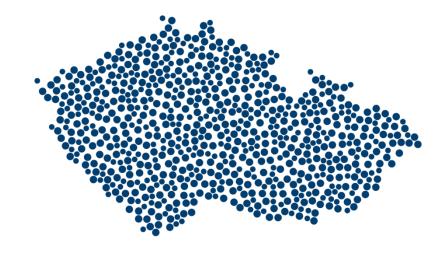


Explorers usually 2-5 days trips without children; as a couple or in a group of friends; preferably for weekends; sometimes in a package that includes a flight and a hotel to reduce costs and the hassle of planning. These trips take place at unique city sites, restaurants and cafes, with a combination of shopping and culture.

**Czech**Tourism

### Israeli Traveller





## 2022 activities in Israel

### V4 workshop in Tel Aviv

B2B workshop organised by Slovakia Travel (V4 cooperation) in Tel Aviv to promote the Central Europe in Israel.

- 6 CZ partners (24 V4 total)
- 50 Israeli partners including touroperators and media representatives

Date: 12. 7. 2022



כנס בינלאומי <<

# נפגשים בתל אביב: בכירי ענף התיירות ממרכז אירופה הגיעו לישראל

לאירוע, שצפוי להינעל היום, הגיעו ברכבת אווירית לישראל סיטונאי תיירות, סוכני נסיעות, בכירים בתעשיית התיירות ומנהלי בתי מלון מסלובקיה, פולין, צ'כיה והונגריה



## Press/fam trip participipation

- Cooperation with Prague City Tourism on a press trip for 2 journalists from The Jerusalem Post in June 2022
  - Media ouputs: 2x podcast (1 h each) + article in JP
  - Topics: Prague, Jewish History, Experiences
- Cooperation with Živý Kraj on a fam trip from Israel for 10 Touroperators in November 2022
  - Topic: Spa region of the Czech Republic





#### Prague: City of towers, spires and a mystical loft

A W. Sing deck. of Pragar's Cold Tom Hall, Pragar's Cold form Hall, Pragar Cambridge (1984) and Cold Tom Hall, Pragar Cambridge (1984) and Cold Tom Hall Pragar Cambridge (1984) and Cold Tom Hall Pragar Cambridge (1984) and Cambridge (1984)

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## **Upcoming Activities for 2023**

#### **IMTM 2023**

February 2023

#### Online and Promotional B2B campaigns

Q2 2023

#### **Sports Tourism and Yoga/Wellness Activity**

Dates TBC

#### **B2B Workshop and Seminars**

Dates TBC

