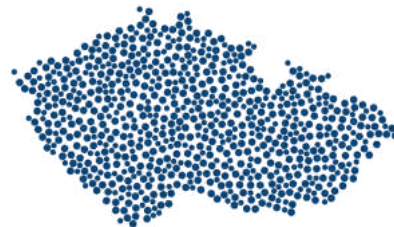


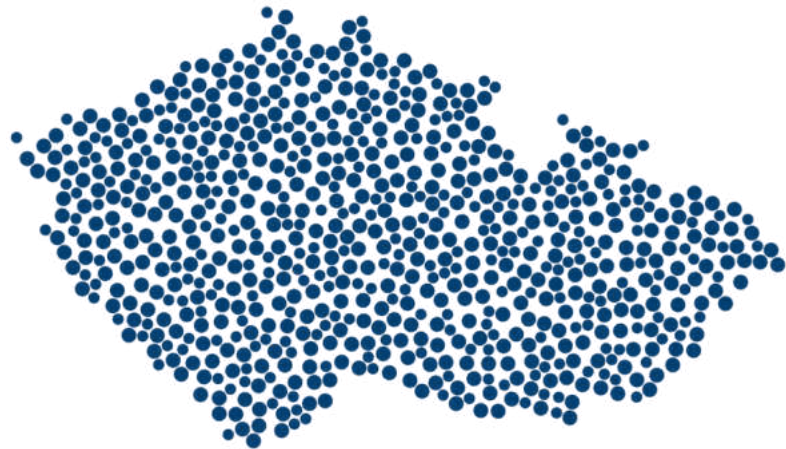
Aktuální situace na zdrojovém trhu – Blízký východ a Indie

Exportní workshop

Obsah



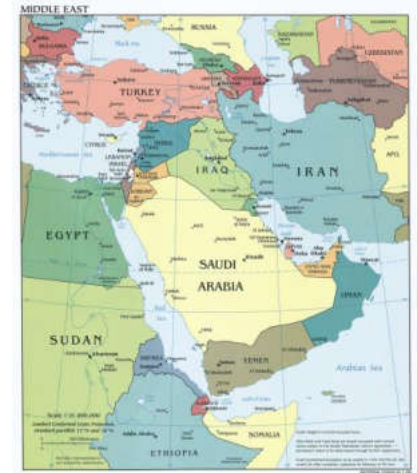
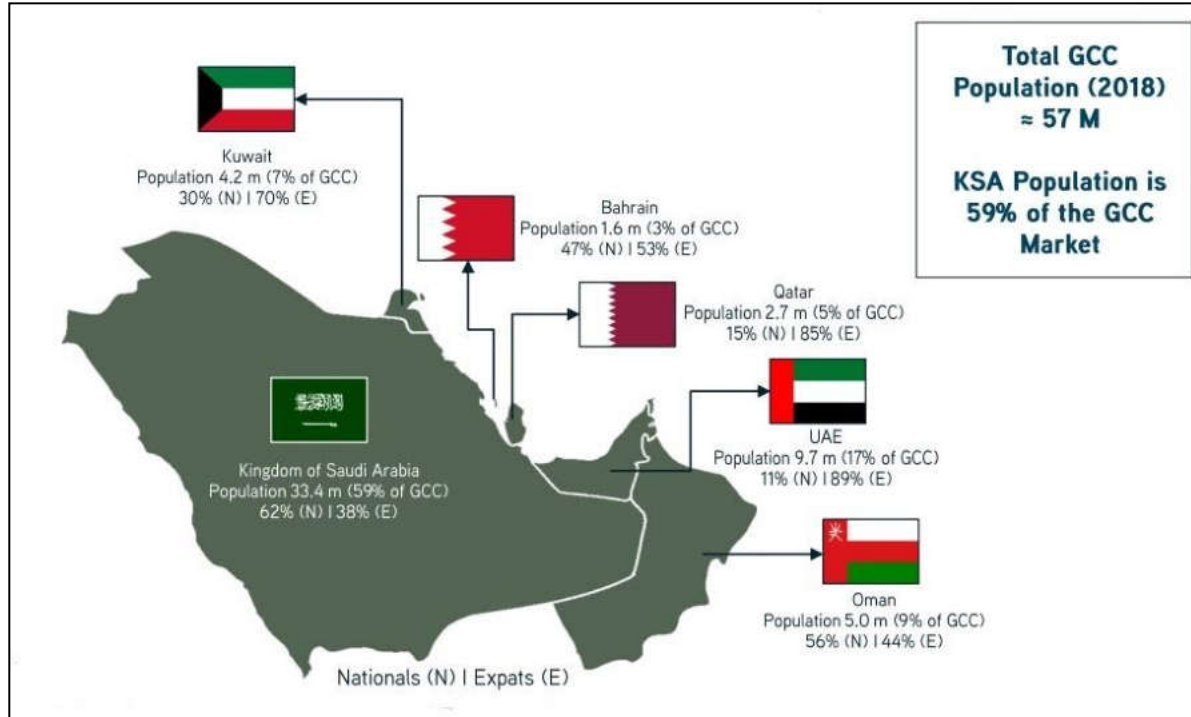
- Blízký východ
 - Vymezení teritoria
 - Aktuální Covid-19 situace
 - Specifikace trhu
 - Marketingové aktivity
- Indie
 - Aktuální Covid-19 situace
 - Specifikace trhu
 - Marketingové aktivity



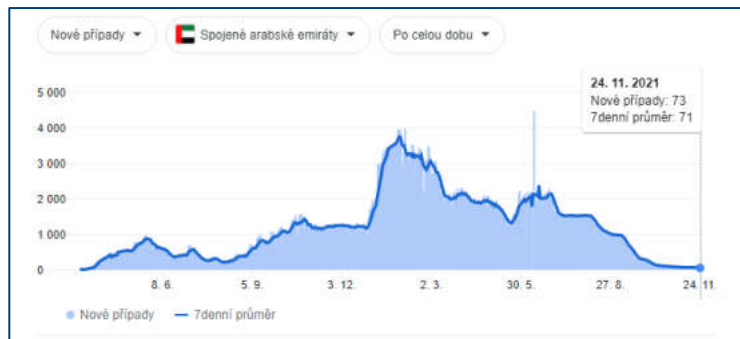
Middle East

United Arab Emirates, Saudi Arabia, Kuwait, Qatar and others

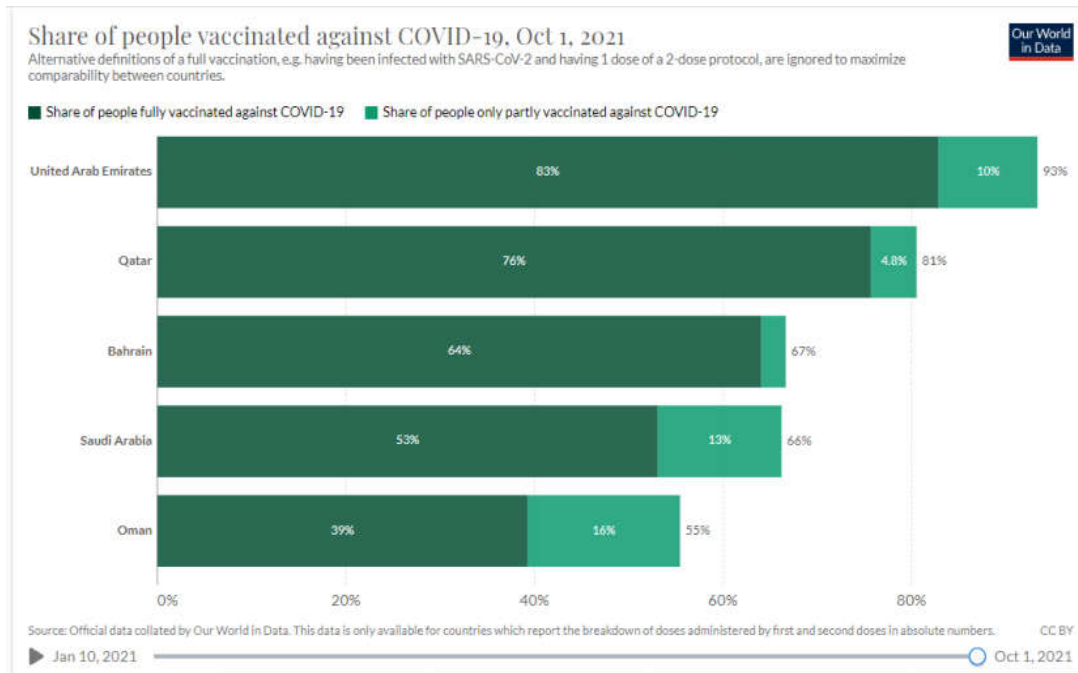
Middle East Market Overview



Covid 19



Covid 19 – Vaccination Status



Restrictions releasing

- **Qatar** – 2. 8. 2021 (green list)
- **Kuwait** – 2. 8. 2021 (green list)
- **Saudi Arabia** – 2. 8. 2021 (green list)
- **UAE** – 18. 10. 2021 (vaccination certificate)

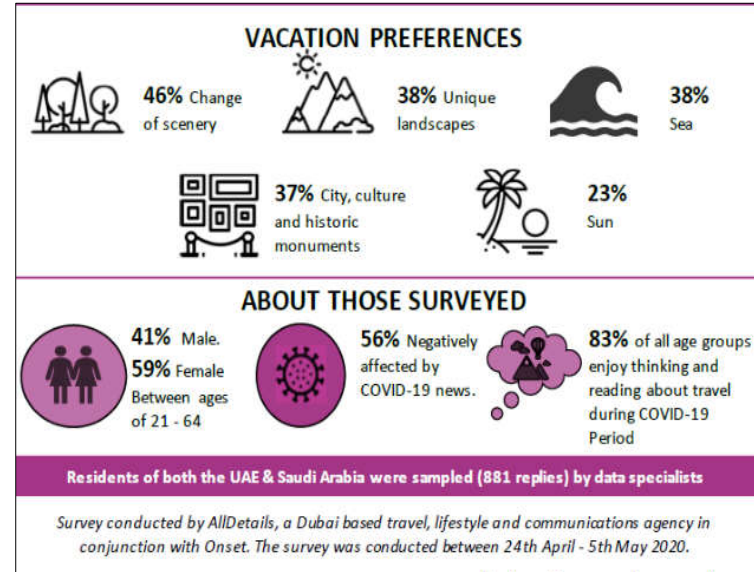
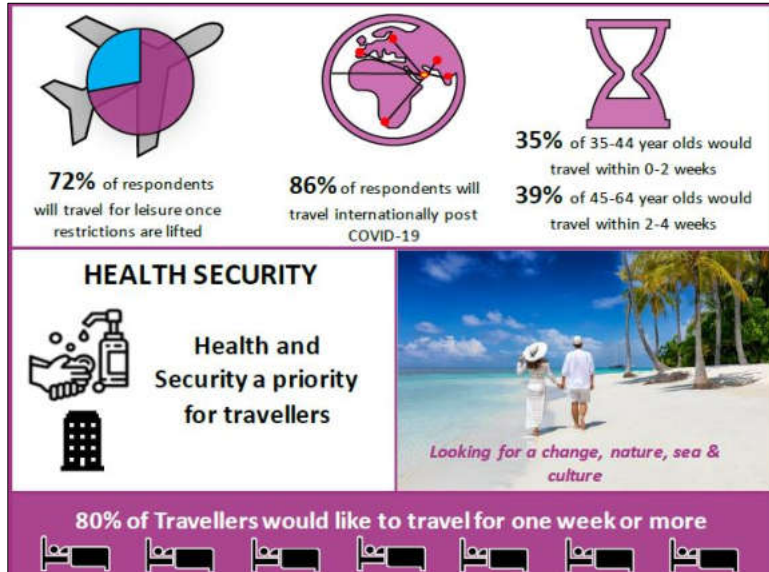


Air Connectivity



Future of Travel Post Covid

83% have said that they enjoy thinking about travel during this period.



Travel trends in 2021

- Growth in outdoor and nature travel
- More Focus on Safety and Security
- Domestic FIT and Family Travel
- Active Tourism
- Wellness and Spa Tourism
- Work-ation packages – Remote Working
- Value-for-money to drive destination choices

Best potential customer segments for Europe

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



Middle East Traveller Insights



- **Family travelers:** GCC 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.
- **Take-it-Easy travelers:** This segment of travelers is younger, and though they are more likely to visit a new destination than the family travel group, they are still largely looking for a place where they can go to relax and be comfortable. Beach resorts, for example, are very popular with this segment.
- **Grown-up explorers:** Similar to the previous segment, these groups are young, but they differ in what they want to get out of their trip. They are looking for adventure, an experience they've never had before, something different, and something unique.
- **Honeymooners:** Honeymooners in GCC present a specialized kind of need because often this is the first time the couple is traveling together. There is a lot of trepidation involved, and the need for reassurance, security, and comfort is extremely high among this group. They want to know that everything will be taken care of and arranged before they arrive

Middle East Traveller – Notable traits



Digital landscape in the Middle East

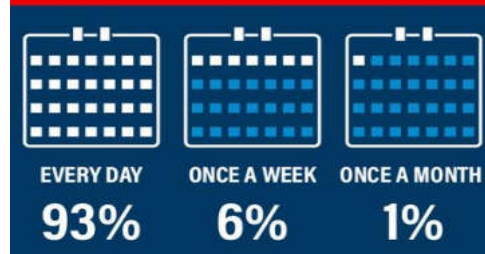
MIDDLE EAST	Population (2020 Est.)	Users, in Dec/2000	Internet Usage 31-Mar-2020	% Population (Penetration)
<u>Bahrain</u>	1,701,575	40,000	1,615,620	94.9 %
<u>Iran</u>	83,992,949	250,000	67,602,731	80.5 %
<u>Kuwait</u>	4,270,571	150,000	4,231,978	99.1 %
<u>Lebanon</u>	6,825,445	300,000	5,546,494	81.3 %
<u>Oman</u>	5,106,626	90,000	4,011,004	78.5 %
<u>Qatar</u>	2,881,053	30,000	2,942,000	99.6 %
<u>Saudi Arabia</u>	34,813,871	200,000	31,856,652	91.5 %
<u>United Arab Emirates</u>	9,890,402	735,000	9,532,016	96.4 %



AVERAGE TIME SPENT DAILY



FREQUENCY OF INTERNET USAGE



Travel behavior of Middle East

Main holiday peak period is summer



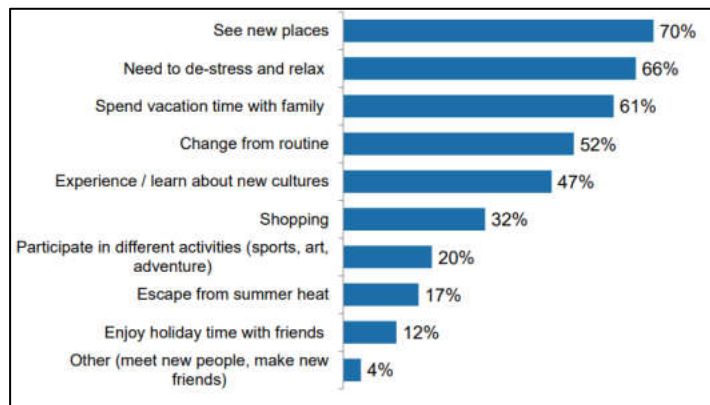
Trend towards travel around the world

Trend towards exploring new destinations



Booking lead times changing to book earlier

Use of internet for research and planning is common



General motivations to holiday abroad



General motivations to holiday abroad

Destination Advantages

- **Direct Connectivity:** Direct flights to the destination from the Middle East makes it easier to promote the country to travel.
- **Diverse Product Offerings :** Czech Republic offers varied experiences to travellers for all seasons making it an ideal destination to travel.
- **Popularity of Prague & Spa/Medical Tourism:** Prague and Karlovy Vary are places which are already popular in the market. This is a great advantage for the destination to be having a sense of awareness and familiarity established in the region.



Key Focus Segments

Key Traveler Segments

Key Tourism Experiences

MICE



Luxury



Edu - Tours



Gastronomy



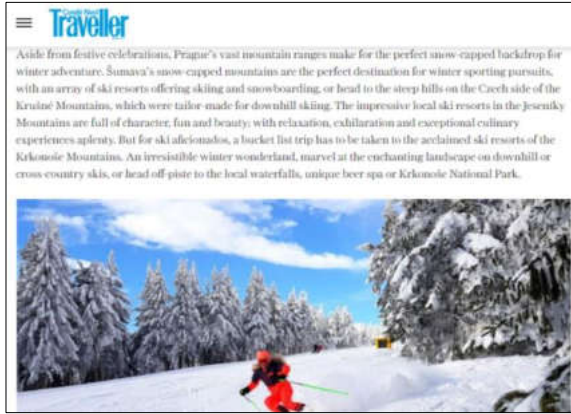
Traditions



Castles and
Chateaux



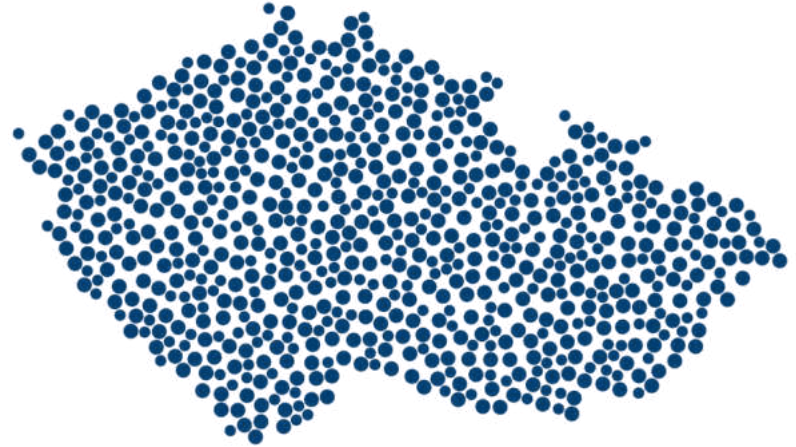
Places beyond Prague gaining popularity



Opportunities To Grow Faster

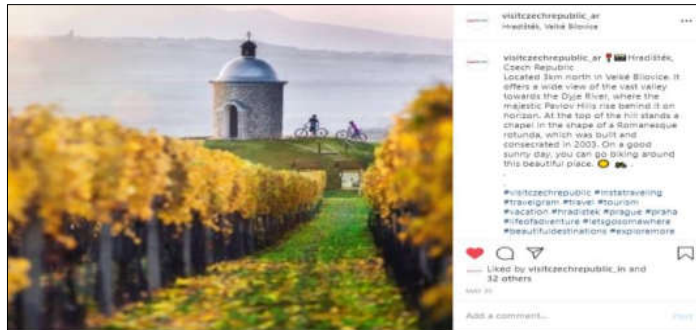
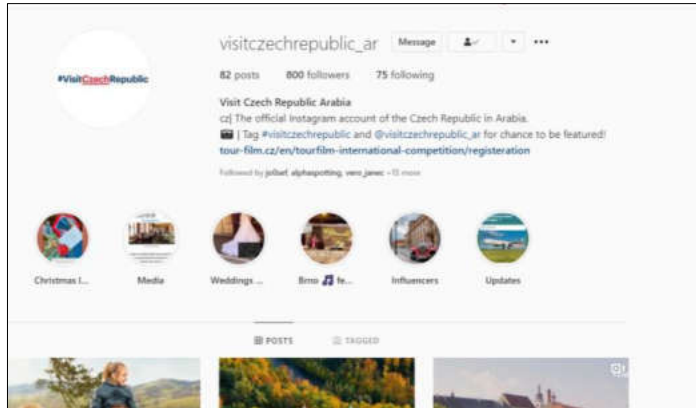
- **Visas:** The visa process to obtain a Schengen visa from Czech Republic for nationalities requires 15 working days and that could change during the peak travel season.
- **Destination Awareness:** Increase in Awareness about the varied destination offerings beyond Prague amongst both the travelers and trade.
- **Participation from Czech Trade and Regions:** Increased participation from Czech Trade and regions to reach out to the GCC travelers will help to grow the market much faster.





Marketing activities

Social Media – Visit Czech Republic Arabia



MALT 2021 Dubai

MICE Arabia Luxury & Travel Congress (MALT)

- The biggest MICE B2B workshop in UAE where CzT participates for last 4 years with its partners.
- Within 2 days partners will have 12 scheduled meetings and approx. 30 unscheduled.
- Middle East participants: corporates, events organisers, wedding planners

Date: 6. – 7. 9. 2021

Next year: 28. – 29. 3. 2021



EXPO 2020

About: Participation at the biggest world exhibition EXPO which was organised for the first time in Arabic country. CzT and its partner presented the Czech Therapeutic Landscapes exhibition with VR.

Main partner: Karlovy Vary Region

Rotation exhibition: 1. – 22. 10. 2021 (Topic: Spa and Wellness)

CzechTourism Day (5. 10. 2021)

- B2B workshop (10 CZ participants + 40 UAE partners)
- Press meet
- Networking evening



#FallInLoveWithCzech



Idea:

- Promote Czech Republic as Yoga and Wellness destination for travellers

Activity:

- The past year made us reflect our lives on various things, however the most important thing we realised was about our physical and mental health.
- The change in travel trend has been where travellers are now prioritizing experiences that reconnect with self.
- Position Czech Republic as a wellness and relaxation destination
- Branded yoga mats with Visit Czech Republic Logo, water bottles and cloth bag
- Invite media and influencers to amplify the event on social media
- Combine it with print and radio
- Trend on Social Media #VisitCzechRepublicArabia

Co-ops and Partnership



- Undertake joint promotions with travel industry partners in KSA , UAE, featuring inspirational content and tactical packages to drive conversion.
- We work with Emirates Holidays, dnata & Seera Group in Saudi Arabia which are, market leaders in terms of reach and now providing access to their 1st party data



Fam / Press / Influencer Trips



- To host and bring travel agents, travel media and tour operators to experience what this scenic country has to offer first-hand.
- Invite 7 - 10 travel agents/tour operators from top travel agencies
- The tour operators and travel agents will get to experience the various unique offerings which will enable them to better relay information to the clients and readers.
- On the last day we can host a Travel & Trade meet where the agents can share their experience of the trip
- After experiencing the destination, the travel trade individuals will be able to develop a proper product portfolio for the source markets.

Czech Republic B2B Roadshow 2022



- Multi-city B2B Roadshow in October / November 2022
- Focus on Saudi Arabia (Riyadh, Jeddah, Al-Khobar)
- Cooperation with the Embassy in Riyadh



MALT Congress and Riyadh Travel Fair

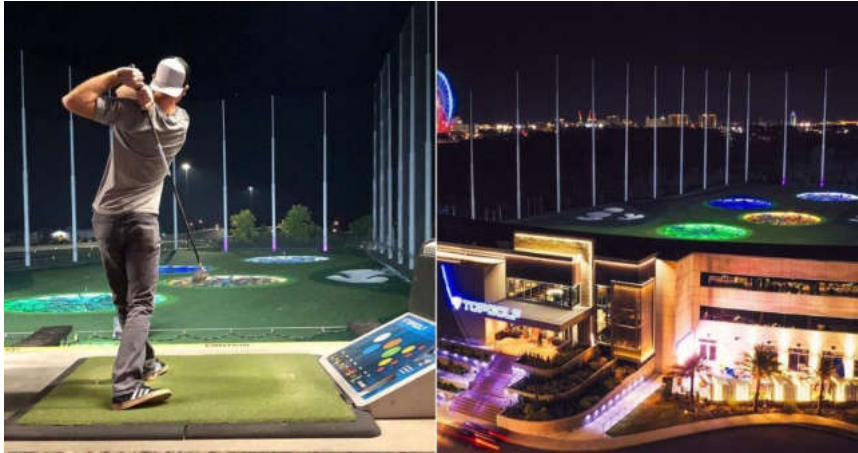


RIYADH TRAVEL FAIR

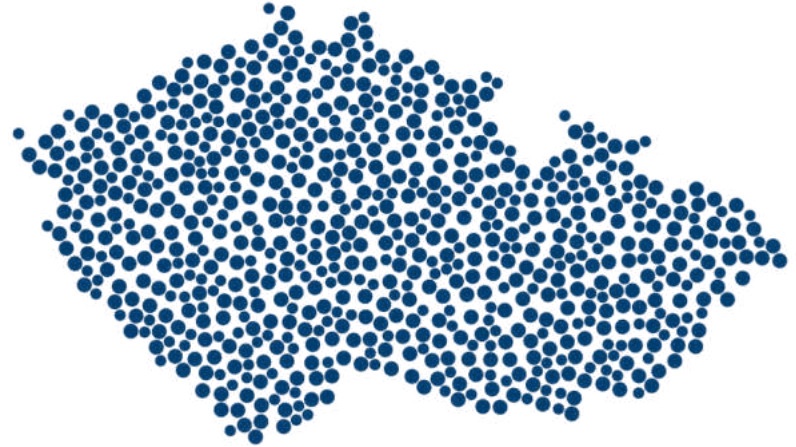
- Participating at MALT, QBLT and KBLT has proved to be a good position to represent as luxury and a MICE product.
- Riyadh Travel Fair is the most important Travel Fair in KSA with access to B2B and B2C segments. We have a great cooperation with the Embassy where we have Networking event for B2B segment.
- Forge new partnerships, learn about best-in-class experiences and listen to some of the biggest players transforming the business of MICE (meetings, Incentives, conferences and Events).
- Setting up of meetings with key partners from the corporate and MICE industry
- Establish brand reputation and trust within the corporate world and trade partners in the Middle East leading to increase in MICE travel to Czech Republic



Introduction of new product – Golf in Czech Republic



- Due to the pandemic Golf has become increasingly popular within the GCC. Our suggestion is to promote Czech Republic as a golfing destination due to its array of fantastic championship golf courses, combined with its historical cities, beautiful countryside. The Czech Republic is able to cater to the source market as it is home to many luxurious hotels and an excellent range of accommodation options enough to meet the needs of those looking for a luxury golf package holiday in the Czech Republic or just an affordable golf break.
- As such we are planning to organize a networking event for travel, trade and media at Top Golf Dubai as one of premium golfing events in Dubai.
- Suggested idea would be to organize an exclusive Golf Fam Trip with 5-6 travel agents who are active golfers in Dubai and who will help promote Czech Republic as a golfing destination.

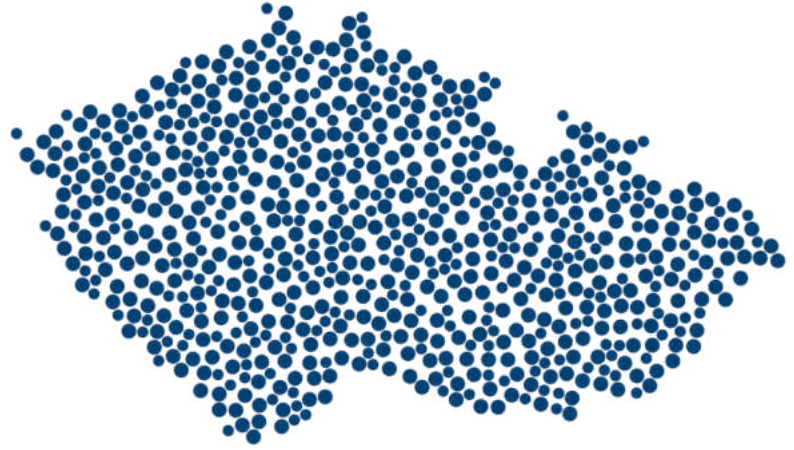


India



India Travel Market - Unique Complexities

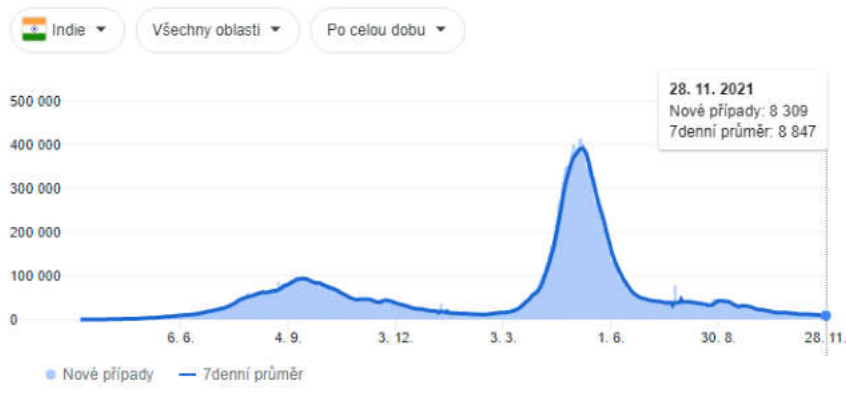




What is the current Pandemic Situation in India

Covid 19

1. 9. 2021 (Covishield)



Celkem Indie

Případy
34,6 mil.
+8 309

Úmrtí
469 tis.
+238

Oblast	Případy +	Úmrtí
Maháráštra	6,63 mil. +832	141 tis. +33
Kerala	5,13 mil. +4 350	39 838 +159
Karnátaka	3 mil. +315	38 198 +2
Tamílnádu	2,73 mil. -736	36 463 -9
Andhrapradeš	2,07 mil. -178	14 438 -6
Uttarpradeš	1,71 mil. +9	22 910
Západní Bengálsko	1,61 mil. -715	19 462 -12
Dillí	1,44 mil. -32	25 097 -1
Urisa	1,05 mil. +191	8 407 +1
Čhattisgarh	1,01 mil. +30	13 593
Rádžasthán	955 tis. -17	8 955
Gudžarát	827 tis. +26	10 092
Madžjapradeš	793 tis. +18	10 528

#VaccinationDriveInIndia

Vaccines currently available



Total Vaccine Doses administered (so far)
1,12,34,30,478

India in
2nd spot for
World's
Biggest Covid
Vaccine Drive

India marches
ahead with
another
achievement in the
fight against
Covid-19 with 1.13
Billion doses
administered

The government aims to ramp up vaccine production, with a pledge to produce at least **2 billion doses** between August 2021 to December 2021 through **6 major manufacturers in India**

Objective: Vaccinating the whole adult population by end of 2021



“We will rise. We will heal. We will overcome these hard times ”



Indian economy is growing at world's quickest rate despite Covid outbreak

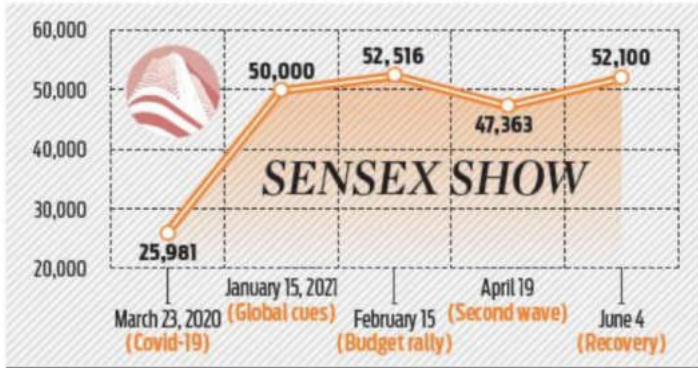
Vaccination has played a very important part in the revival of the travel industry in the Indian Market

Govt. of India announced USD 275 Billion stimulus package

World Bank who has predicted that India's real GDP growth for fiscal year (FY21-22) could range from **7.5 to 12.5 %**



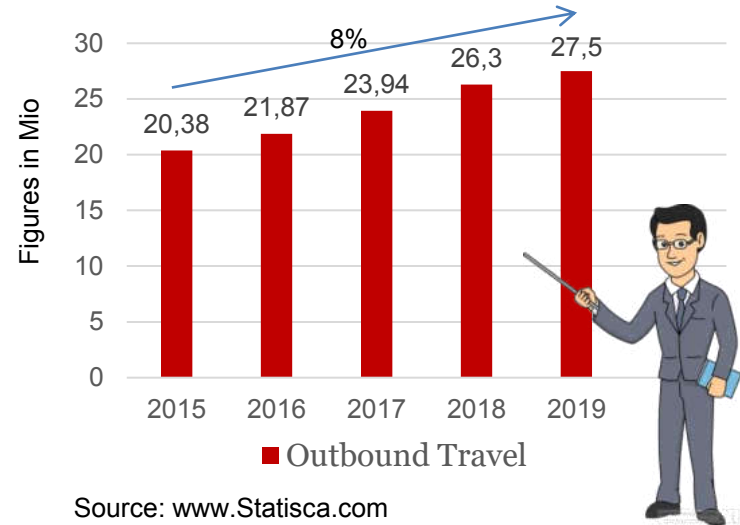
HOPE



Market Analysis

- India makes for a major part of the outbound tourists in the world tourism sector. With the Covid-19 pandemic, the world is trying to salvage the tourism industry. **Outbound from India was close to 29 million in 2019.**
- Indian tourists are **amongst the highest spenders** abroad.
- Although business, holiday and VFR remain the staples of Indian outbound tourism, Indian outbound travelers are increasing opting for other diverse types of holidays, such as sports vacations, luxury holidays, adventure trips, honeymoons and cruises.
- From remote working, luxury staycations, pod travel to the concept of 'bleisure' combining business and leisure travel as an emerging segment, are many of the emerging trends currently in the Indian Market

Outbound Travel over the past 5 years



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 celebrated the milestone of administering 1 billion COVID-19 vaccine doses in Oct 2021



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

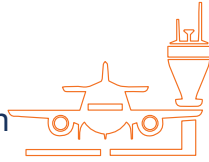


Electric carmaker Tesla plans fully-owned retail outlets in India

1.39
Billion
population



34
International
airports



65%
Under the
age of 35



27
Million outbound
travellers in 2019

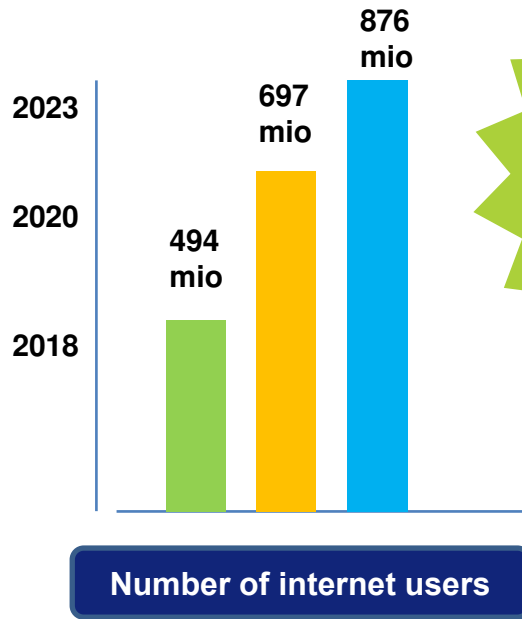


75
Million
passport
holders



India's Digital Wave

India has been swept by the Digital wave since the launch of the “Digital India” programme by its current government. The country is likely to reach 761+ million internet users by year 2021, with approximately 876+ million users by end of 2023.



The number of internet users in India increased by 47 million (+8.2%) in 2020/21



Active Social Media Users : 624 Million

Mobile Connections 1.10 Billion



Top/Bottom three cities by internet penetration



Year	2010	2016	2025
Internet Penetration (%)	8%	25%	55%

Internet Penetration

India's Outbound Tourism Overview

Outbound **India** Road Map



Airline Connectivity

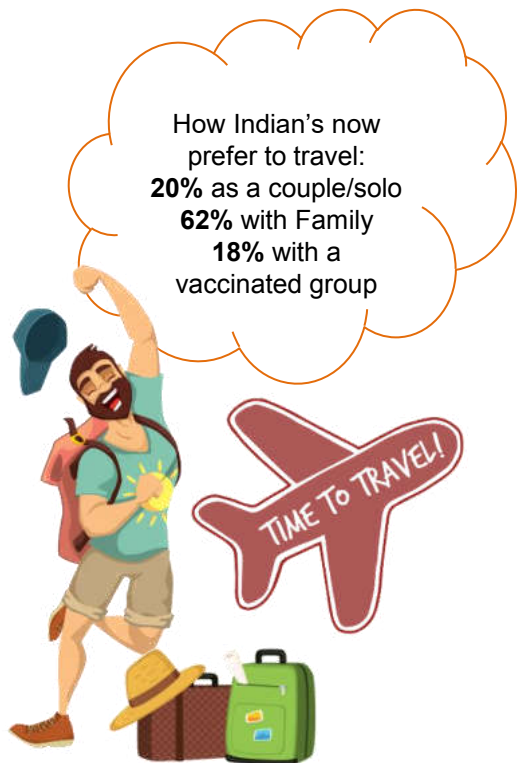


No airlines flying direct from India to the Czech Republic currently. Other airlines flying to the Czech Republic via hubs are Emirates, KLM, Lufthansa, Turkish Airlines, Fly Dubai, Qatar Airways, Etihad Airways



العربية للطيران
airarabia.com

Post Covid-19 Travel Drivers for Indian Tourists



Preferred Destinations



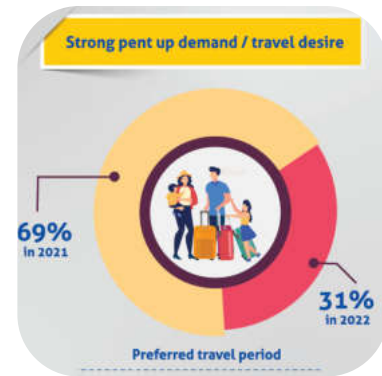
54% prefer to travel to domestic destinations like Kashmir, Ladakh, Himachal, Andaman, Goa and Kerala



46% prefer to travel to international destinations like Dubai/Abu Dhabi, Thailand, Maldives, Mauritius and Europe



70% of travelers take safety into consideration with regards to hotels etc when booking their travels

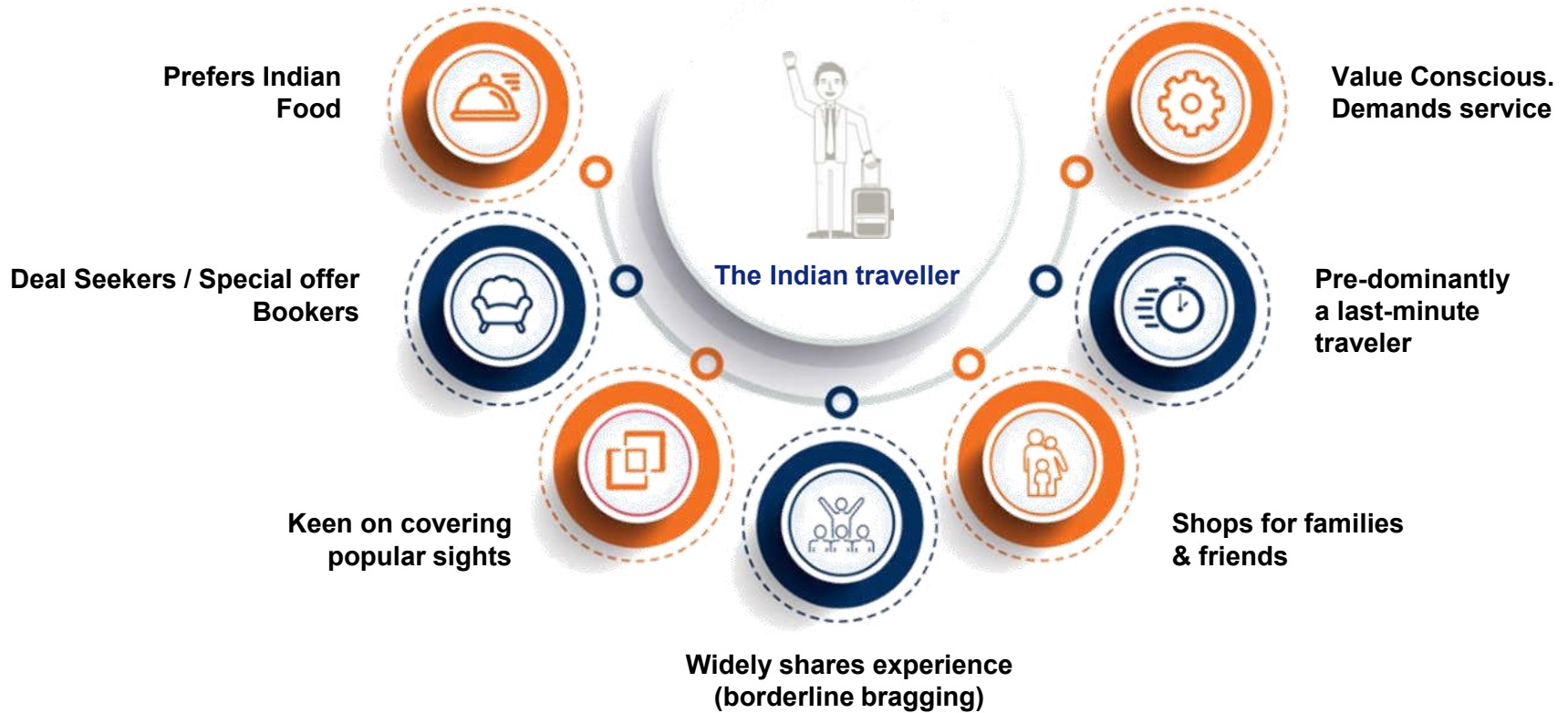


35% of people prefer to take 3 -5 days Holidays

52% of people prefer to take 6-12 days Holidays

13% of people prefer to take 12+ days Holidays

Notable Travel Traits of an Indian traveler



*The younger generation of Indian travelers are drifting from the above pattern

Travel Season – When Indian's like to Travel

Summer vacations are the most preferred time of travel for the Indian traveler

The non-summer outbound travel is steadily growing



Czech – India Tourism Outlook

Top 5 Tour Operators promoting the Czech Republic in India

Make My Trip

Thomas Cook India

SOTC

FCM

EBIX



Key words use to describe Czech by Tour Operators

Honeymoon destination

Self Drive

Luxury Experience

Family Holiday



Popular Holiday Categories

Honeymoon

Family Holidays

Luxury

Nature

MICE



Travel Trend Predictions for 2022+

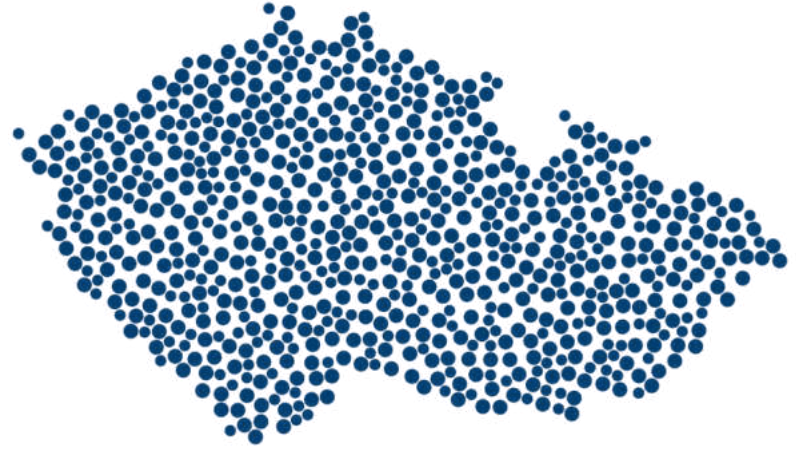


- ✓ **REGENERATIVE TRAVEL:** Closer to nature to refresh themselves from an indoor lifestyle
- ✓ **WORKCATION:** Virtual meetings and online classes, work from any where in the world
- ✓ **STAYCATIONS:** Preference of luxury hotels, resorts, upgrade to suite room
- ✓ **POD TRAVEL:** Small groups of four, with pets or a close knitted group
- ✓ **VACATION RENTALS:** Private villas, bungalows, cottages quipped for longer stays and social isolation
- ✓ **DIGITAL EXPERIENCE:** Smooth check-in and check-out process, digitised dining menu, advanced sanitisations



Decision Making





Marketing Activities

There's So Much Czech Republic Has to Offer

Wellness
Spas &
Beer Spas



Why The Czech Republic



Adventure,
Outdoor &
winter
activities



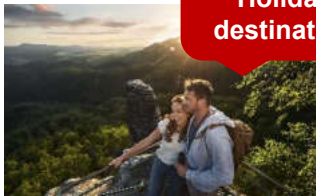
Gastronomy



MICE &
Wedding
Destination



Family
Holiday
destination



Nightlife &
Shoppers
Paradise



Key Focus Pegs For The Indian Market in 2022+

Key Traveler Segments

Key Tourism Experiences

MICE



Luxury



Edu - Tours



Gastronomy



Traditions



Castles and
Chateaux



Target Audience for 2022+



Best potential customer segments for Europe from the Indian Market



Family
Travellers
35-54 years



Millennial
Travellers
18-34 years



MICE

India is a key source market for MICE tourism globally owing to the rapid growth of the IT and the Medical Industry. Owing to the pandemic, corporates have unutilised MICE budgets and are looking for opportunities to explore MICE destinations that are safe for their employees and Czech Republic offers the them all:



Great Connectivity



Cities are at a close proximity to each other



Regional partners for MICE event planning assistance



Great Hotels and Conference venues with capacity for small and large groups



Event spaces with scenic views, castles and chateaux, gardens, UNESCO Heritage sites and interesting incentive itineraries



WEDDINGS

Czech Republic is well equipped as a destination for beautiful weddings post Covid as well as large Indian weddings...



Great Connectivity



Cities are at a close proximity to each other



Regional partners for MICE event planning assistance

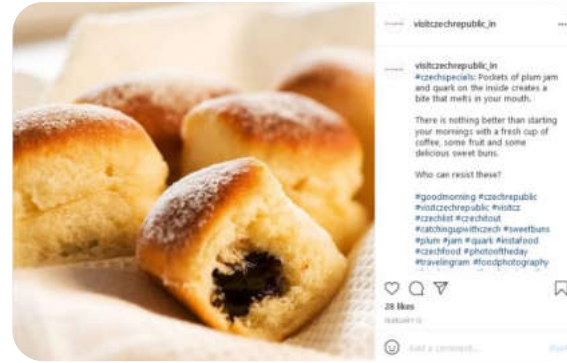
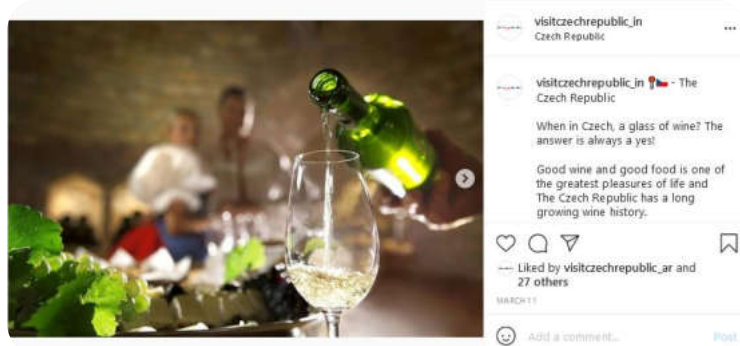


Great Hotels and Conference venues with capacity for small and large groups

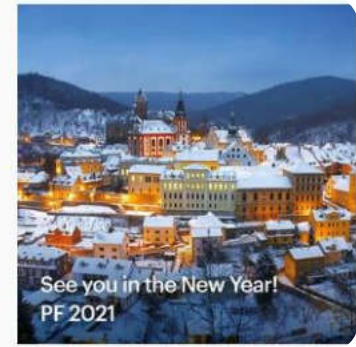


Event spaces with scenic views, castles and chateaux, gardens, UNESCO Heritage sites and interesting incentive itineraries

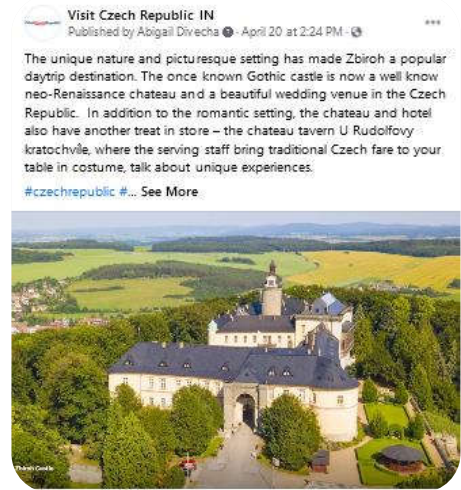
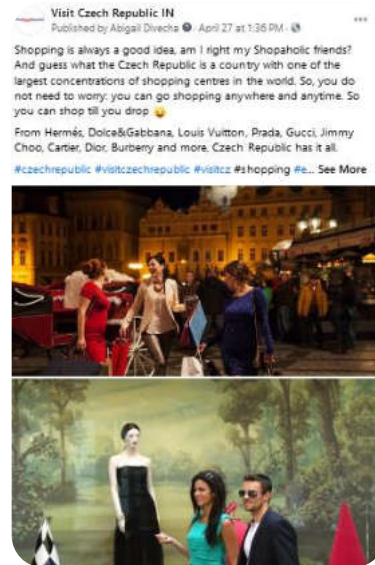
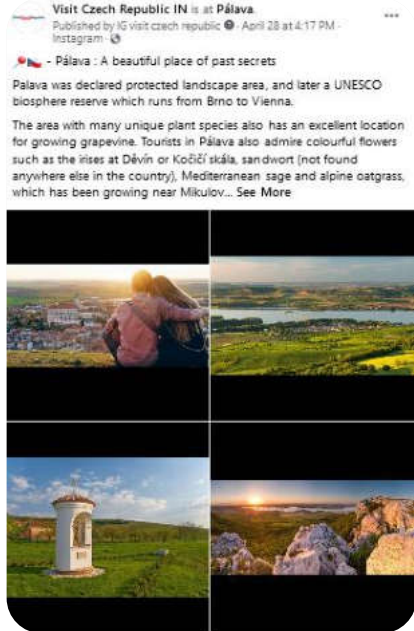
Social Media Promotions – Instagram



♥️ +100
Likes



Social Media Promotions – Facebook



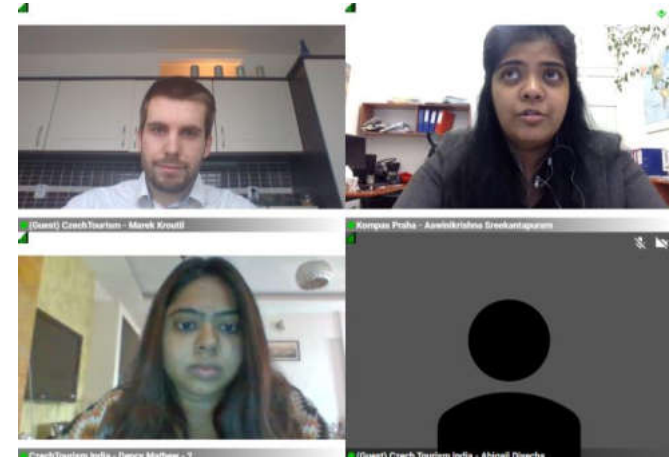
Online Asia Workshop

Online B2B workshop (leisure & MICE) focused on Asia in cooperation with other CzT Foreign offices (India, Japan, China and South Korea). Workshop was accompanied by the destination presentation for Indian trade partners.

Topic: to renew the contacts with Tos and get the actual information about the Covid Situation in India

Date: 24. 3. 2021

Results: In total there were 15 Indian buyers (MICE + leisure) who had the possibility to meet 40 Czech partners (DMCs, hotels etc.).



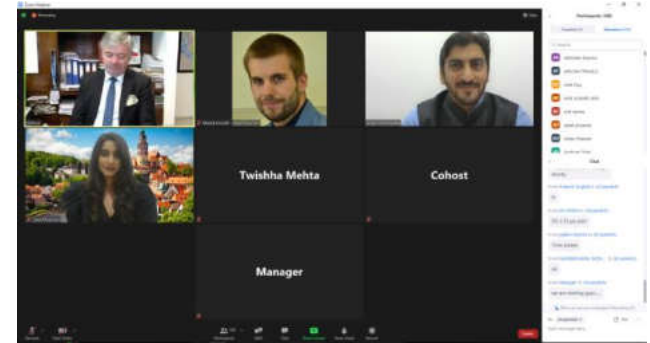
PAN India Destination Training

Professional organised online destination webinars about the specifics of the Czech Republic and its offered products across the India.

Date: September – November 2021

Results: Event was participated by around 1 000 IN Touroperators who took the destination training.

Czech Republic as a package is quite interesting amongst the TOs, because a lot of their clients are asking about it.



Taste the Czech Republic



- Host an Indian Chef / Food Blogger in the Czech Republic to leverage on their follower/fan database
- Highlight and promote the gastronomical wonder of Czech Republic both local and international.
- Episode based Reels of influencer experiencing all sorts of unique food in Czech with 'TO BE CONTINUED' or 'GUESS WHAT HAPPENED NEXT' as the curiosity hook.
- Create a series of episodes, where the host will convey to the Indian audience what to eat, where to eat and the must try local dishes in Czech Republic.
- Promote these episodes on an OTT platform or televisions like TLC travel EP discovery.

#VisitCzechRepublic B2B India Roadshow



- To host a multi-city roadshow to present the various attractions and products of the Czech Republic to the Indian Trade and media partners.
- The roadshow will be hosted in key markets – Mumbai, Delhi and Bangalore / Ahmedabad / Kolkata.
- Invite members from the Czech Republic and other European NTO's, Indian Ministry of Tourism, Delhi/Mumbai Airport, Aviation Ministry, Airlines from India & European Countries, Chamber of Commerce, Key Trade Partners, Media, corporates and hotels.
- **Date:** September 2022

Trade Exhibitions - MILT Congress



- Participate in the Annual MILT congress in Mumbai
- Forge new partnerships, learn about best-in-class experiences and listen to some of the biggest players transforming the business of MICE (Meetings, Incentives, Conferences and Events).
- Establish brand reputation and trust within the corporate world and trade partners will help create awareness and buzz for the Czech Republic in India, leading to increase in MICE travel

Influencer Trips



- Collaborate with niche group of influencers to explore the destination and create a buzz through their stories and recommendations
- Identify and take 4 - 6 social media influencers (Food/travel influencers)
- Showcase different facets of the Czech Republic and give them firsthand experience of the products
- Content will be amplified once they are back in India on various digital platforms
- ROI will be everyday blogs/updates/tweets which will help us garner widespread visibility for Czech Republic and entice people to travel to the destination post Covid 19

A Destination for the new Millennial #SelfDriveThroughCzech



CzechRepublic

X



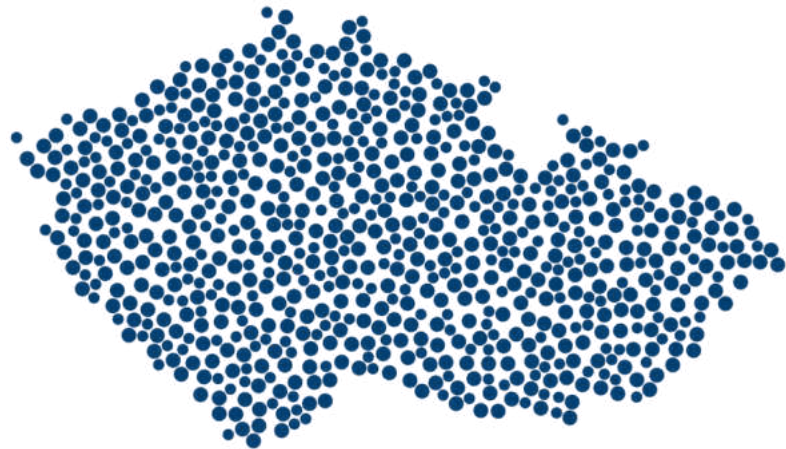
ŠKODA

- The network of roads in the Czech Republic are very good making the destination accessible by road from across cities to mountains to castles. Here we intend to showcase Czech Republic's off beat places, gastronomy, traditions and experiences to visit.
- We will take 2 - 3 lifestyle/travel bloggers to travel to Czech Republic and visit off beat places, experience traditional food, explore culture and traditions in Czech Republic on a drive. They will drive through all the beautiful places and showcase the destination
- We propose to tie up with an automobile brand Skoda.
- This will be executed via small episodes on YouTube & influencer's Instagram profiles

FAM Trips



- To host and bring travel agents, travel media and tour operators to the Czech Republic to experience what this scenic country and marvelous experiences the country has to offer first-hand.
- Invite 5 - 10 travel agents/tour operators from top travel agencies to travel to the Czech Republic.
- The tour operators and travel agents will get to experience the various unique offerings and facets the Czech Republic has to offer first-hand, which will enable them to better relay information to the clients and readers.
- After experiencing the destination the travel trade individuals will be able to develop high-end luxury & MICE products for the Czech Republic in the Indian Market.



Thank You!

Marek Kroutil