

Inbound Tourism – Prague, 2014 – Overall Assessment

Facts and Figures:

- Total visitors: 6,096,015
foreign: 5,315,054 (87.2%)
domestic: 780,961 (12.8%)
- Total visitor growth in Prague: 3.3%
foreign growth: 5.3%
visitors from CR declined by 8.3%
- Greatest number of visitors in Q3.
The most visitors came to Prague in August.
- Main countries of origin: Germany, Russia, USA
- 64.5% of all visitors came from Europe, 12.5% from Asia.
- TOP 10 countries, including residents, were responsible for 62.5% of all visits to Prague.
- Greatest growth: Germany, China, South Korea, USA
- Total overnight stays: 14,750,287
foreign: 13,381,733 (90.7%)
from CR: 1,368,554 (9.3%)
- Total growth in Prague overnight stays: 0.7%
foreign growth: 2.5%
decline in residents by 14.3%
- Average length of overnight stays: 2.4 nights
non-residents: 2.5 nights; residents 1.8 nights
- Visitors from Russia had the longest stays in Prague – on average 4 nights
- Despite the unusual growth in visitors from China and South Korea, visitors from Germany still numbered 5x more than Chinese and nearly 6x more than Koreans.

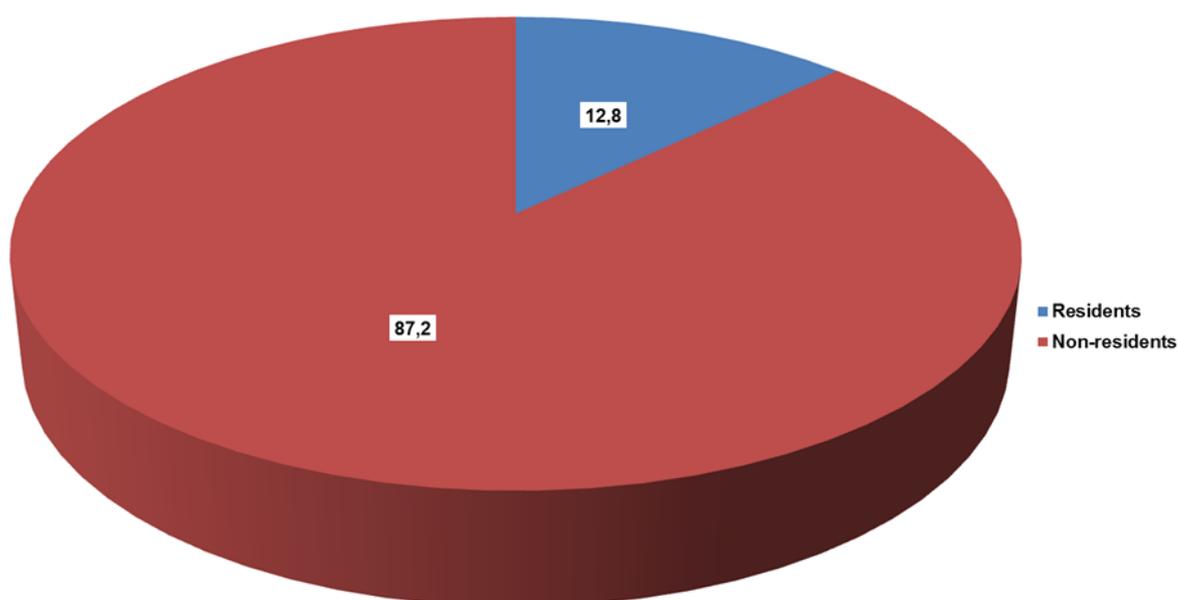
2014 was a very successful year for Prague in terms of inbound tourism, marking the **first time in history** that the city had **more than 6 million visitors** who stayed in collective accommodation establishments. The number of **overnight stays** also hit a new **record** in 2014.

Visitors

In 2014 a total of 6,096,015 visitors stayed at collective accommodation establishments in Prague; 780,961 of these were residents (12.8%) and 5,315,054 were non-residents (i.e. 87.2%).

As usual, foreign visitors numbered significantly more than residents; the share of foreign visitors increased by 1.6% year-on-year.

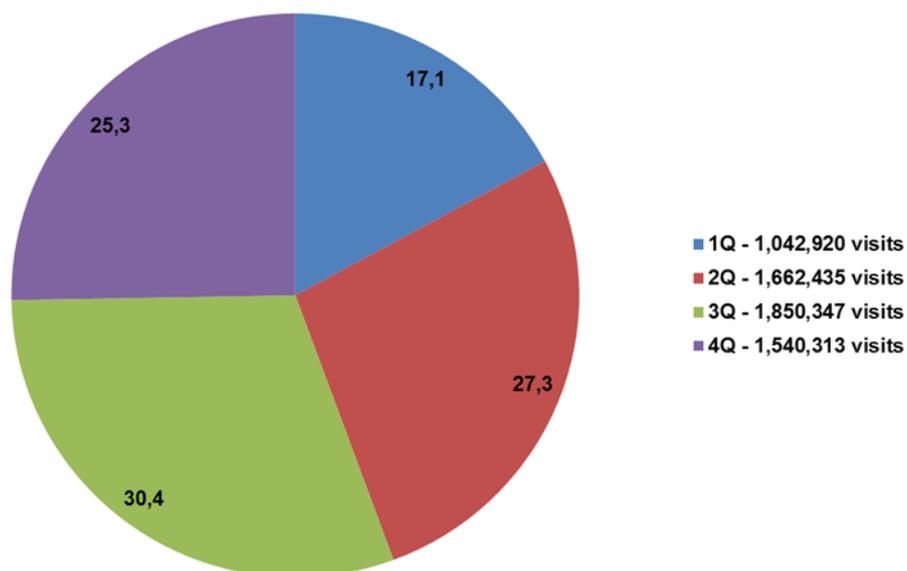
Prague 2014 – Percentages of resident and non-resident guests



Prague welcomed **196,385 more visitors in total (+3.3%)** in 2014 than in the previous year. However, only visits from **non-residents increased, by 267,098 (+5.3%), while visits from residents declined by 70,713 (-8.3%).**

The strongest quarter from the standpoint of total number of visitors was, as usual, **Q3**, the main tourist season. Between July and September 2014, a total of 1,850,347 visitors from around the world chose Prague as their destination. The slowest quarter was Q1, with a total of 1,042,920 visitors to Prague.

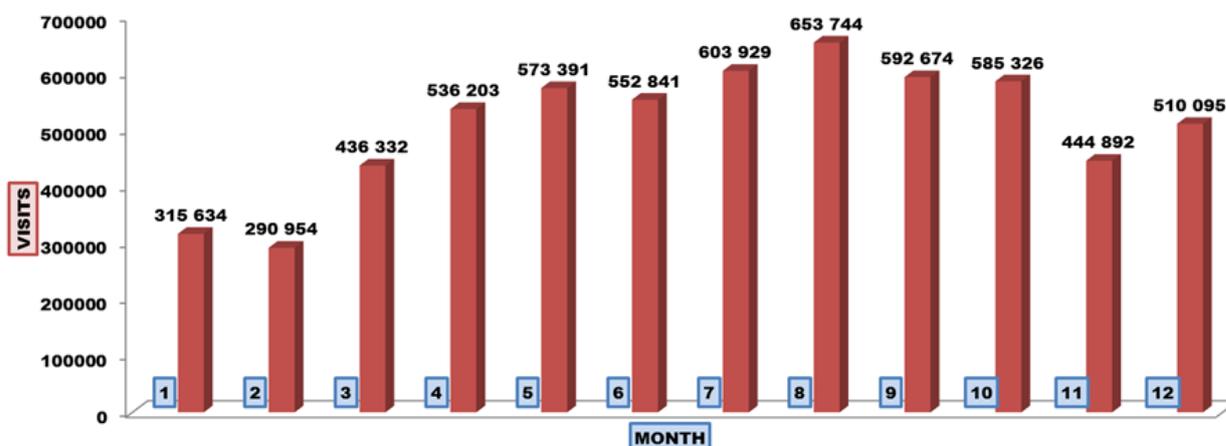
Prague 2014 – Total visits – broken down by quarter



As in previous years, visitor numbers also fluctuated from month to month. **The highest visitor numbers for the year occurred in August**, which is always the pivotal month from the standpoint of Prague visitor numbers. July and September also had very good visitor numbers. The least popular month for visitors was February, as in past years, with a total number of visitors less than half that of August. The period between **June and December saw unbroken growth in total monthly visitor numbers.**

Q2 saw marked improvements from the perspective of a growth in total visitor numbers.

Prague – Total visits – strongest month of 2014



Overnight Stays

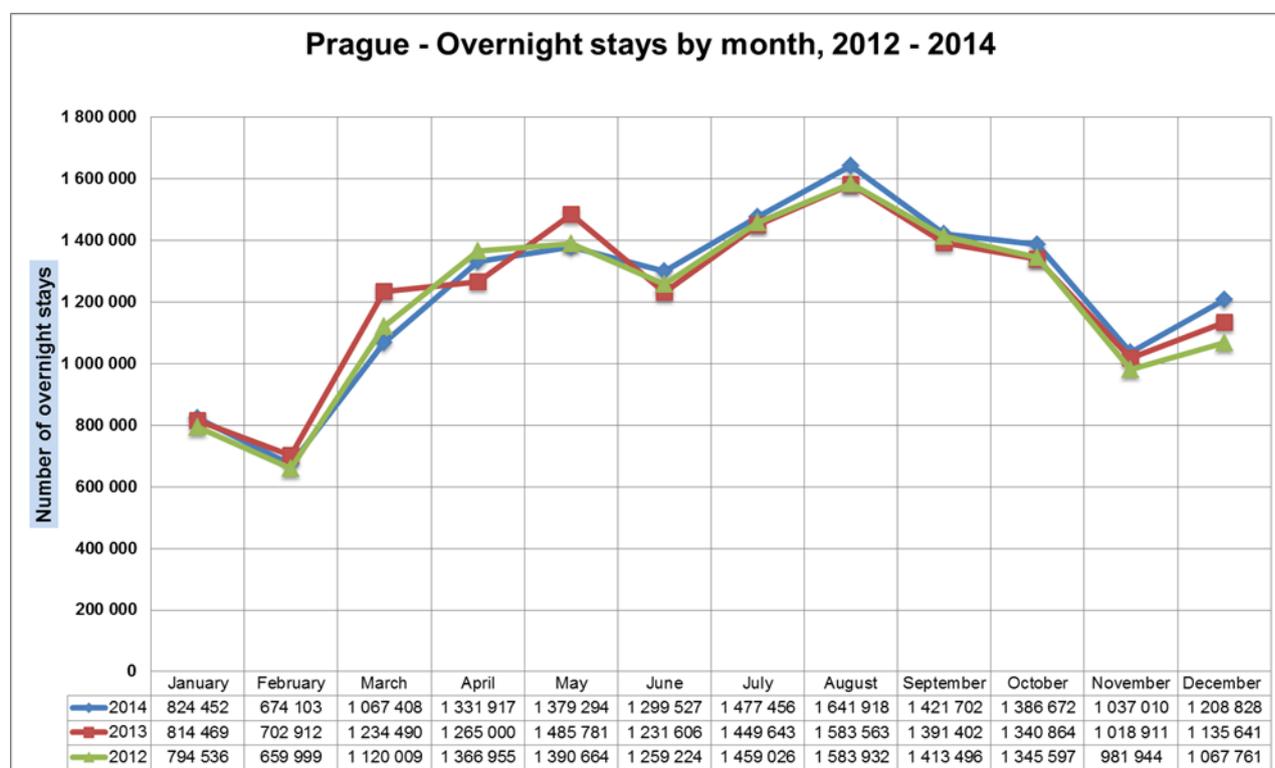
The total number of overnight stays at collective accommodation establishments in Prague came to **14,750,287 nights** during 2014. This represents a new record and a **growth of 96,005 nights (+0.7%) year-on-year**.

The increased number of overnight stays was due to an increase of 324,802 nights (2.5%) on the part of foreign visitors; residents spent 228,797 (14.3%) fewer overnight stays in Prague.

Foreign tourists make up the majority of overnight stays as well, with Czech residents at less than one tenth of that number.

Foreign visitors had 13,381,733 overnight stays, while residents had 1,368,554 (9.3%).

The most overnight stays in Prague occurred in **August**, and the fewest in February. The difference between the strongest and weakest month of 2014 came to nearly one million overnight stays.



Average length of overnight stays

The average length of overnight stays was shorter by 0.1 nights in all categories, confirming the previously observed trend that visits have been getting shorter for some time.

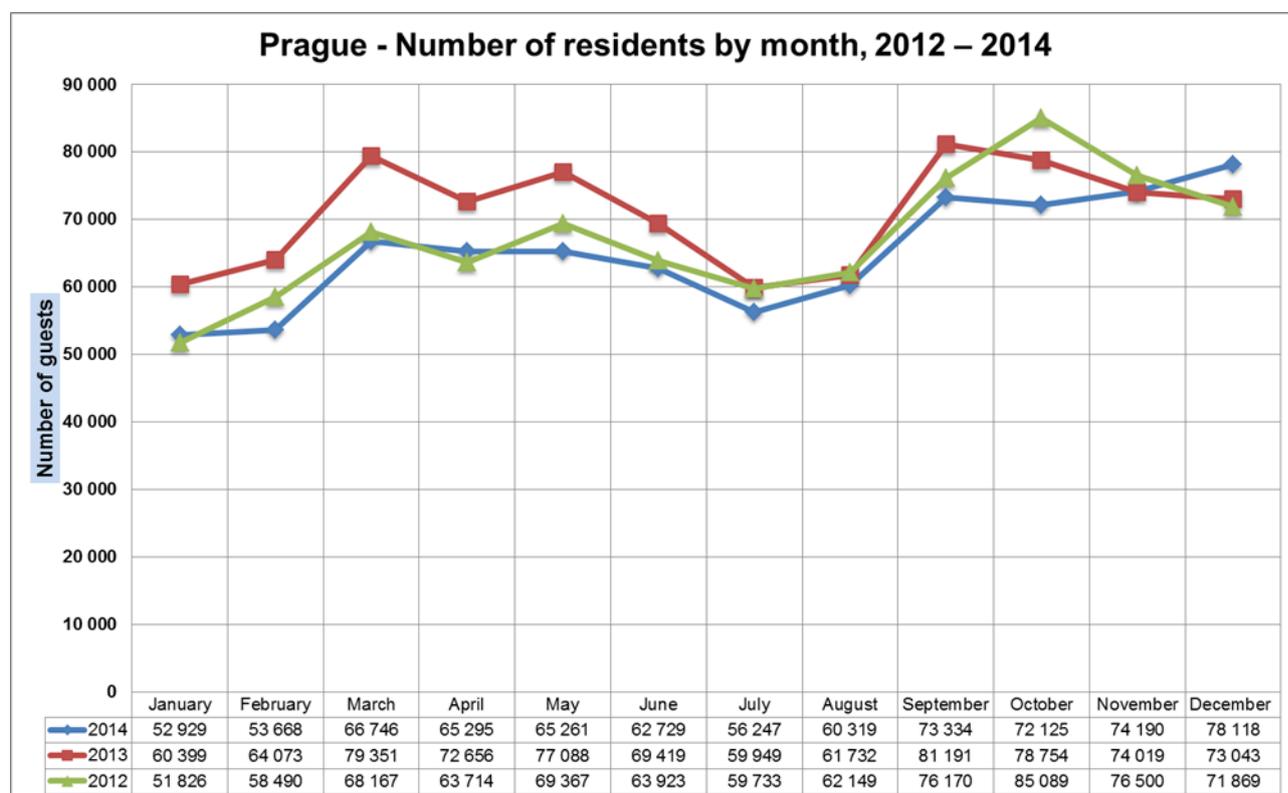
Total: 2.4 nights

Foreign: 2.5 nights

Residents: 1.8 nights

1. Domestic visitors to Prague

A total of **780,961 visitors** came to Prague from elsewhere in the Czech Republic during 2014, making up **12.8%** of the total number of visitors.



The number of resident visitors **dropped by 70,713 (-8.3%)** year-on-year. This drop appeared in each of the first ten months of 2014, with November and especially December bringing a positive change in resident behavior.

This not particularly optimistic result can be explained by the overall negative financial situation in Czech households, which then behave according to their economic expectations.

The highest number of residents came to the Czech capital in **December**, but the whole autumn was more or less even. Czechs do not like coming to Prague in January and February any more than other visitors, while July and August also saw low numbers of Czech visitors.

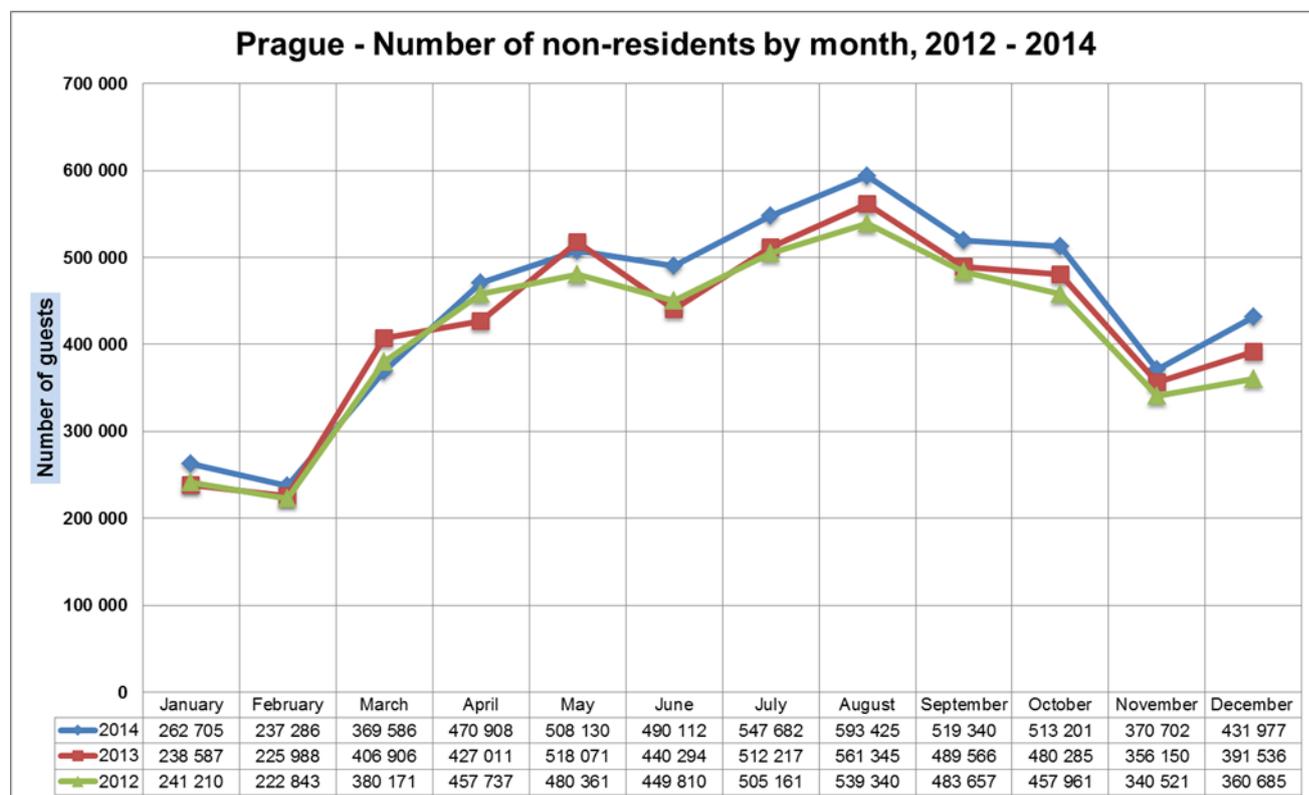
In comparing the individual quarters, **Q4 is in the lead** with domestic visitors.

Residents spent a total of **1,368,554 overnight stays** in collective accommodation establishments in Prague during 2014 as a whole. This is a marked **drop of 228,797 (-14.3%) nights** in comparison to the previous year. Residents spent an average of **2.8 days** visiting Prague.

2. Foreign visitors to Prague

The number of foreign visitors in collective accommodation establishments came to 5,315,054 for all of 2014, for a quite large increase year-on-year of 267,098 visitors (+5.3%).

Foreign visitors formed the main component of total visitors to Prague at 87.2%.



The category of foreign visitors coming to Prague also saw a new record in 2014.

The most popular month for foreign visitors was **August**, with the smallest number of foreigners coming to Prague in February.

In comparing the individual quarters based on total numbers of foreign guests, **Q3 is in the lead** and Q1 trails behind in last place.

Source Countries

The highest number of foreign guests in 2014 came from **Germany**, as in previous years, with Russia coming in second and the USA coming in third.

The TOP 10 source countries remain stable and are unchanged from 2013. The only change is Poland and Spain switching places between 8th and 9th place.

Top 10 markets with the highest total visits in 2014:

Country	Guests	Growth/Decline	Growth/Decline (%)
Germany	733,241	+56,108	+8.3
Russia	473,571	-68,618	-12.7
USA	388,817	+29,861	+8.3
United Kingdom	337,373	+17,398	+5.4
Italy	304,570	+18,393	+6.4
France	220,072	-17,239	-7.3
Slovakia	213,667	+12,875	+6.4
Poland	187,570	+25,658	+15.8
Spain	173,015	+8,321	+5.1
Other Asian Countries *	165,381	+15,903	+10.6
China	149,403	+35,049	+30.6

*Note: "Other Asian countries" do not include China, India, Israel, Japan or South Korea, which are tracked separately by the Czech Statistical Office.

Visitor levels from TOP 10 countries

The above mentioned TOP 10 countries accounted for 60.2% of all foreign visits (52.4% of total visits to Prague) on their own.

Germany

By far our strongest source market, surpassing Russia in second place by nearly 260,000 visitors. The number of visitors from Germany is only slightly lower than the number of people who came to Prague from elsewhere in the Czech Republic (780,961).

Germany's share in the total number of foreign visitors is 13.8% (or 12% in the total number of visitors including residents). The number of visitors saw massive growth in 2014, with 56,108 (8.3%) more visitors than the previous year.

Russia

The number of visitors from Russia was growing swiftly up until last year, although 2013 did show a certain slowdown in growth. 2014 saw a quite noticeable decline in the number of visitors, by 68,618 (-12.7%) as a result of the Russia-Ukraine situation and the ruble's fall in value. Even though Prague had fewer Russian visitors in 2014 than the previous year, Russia still retains the second place position, with over 80,000 visitors more than the USA in third place.

USA

The USA repeated – even exceeding somewhat – the marked growth in visitor numbers from 2013. Visitors from the USA make up 7.3% of the total number of foreign visitors (6.4% of the total number of visitors).

Italy

After a decline in number of visitors in 2013, Italy once again joined the ranks of countries with a solid annual growth in 2014.

France

France showed one of the greatest drops in number of visitors to Prague, probably due to the economic situation.

Slovakia maintained its position at 7th place with almost double the growth in visitors as compared to 2013.

Poland jumped above Spain to 8th place as the country with the fifth largest growth in visitor numbers.

Spain

This country experienced a noticeable renewal in 2014. One of the greatest drops in visitor numbers from 2013 turned around for a promising growth of 8,321 visitors (+5.1%) in 2014.

Asian countries

These are very much developing markets, which are compensating for the losses at the moment from Russia and Ukraine. The most Asian visitors to Prague came from **China**, which also had the greatest growth in visitor numbers. Visitors from **South Korea** also came in much greater numbers than previously, spurred on by the eight regular flights per week between Prague and Seoul.

Another promising source market in 2014 was Israel.

Japanese visitors, however, showed up in smaller numbers throughout the year, most likely due to the stagnating Japanese economy.

Out of the total number of 52 countries and territories monitored, only 11 demonstrated a decline in the number of visitors; visitors from all other countries increased.

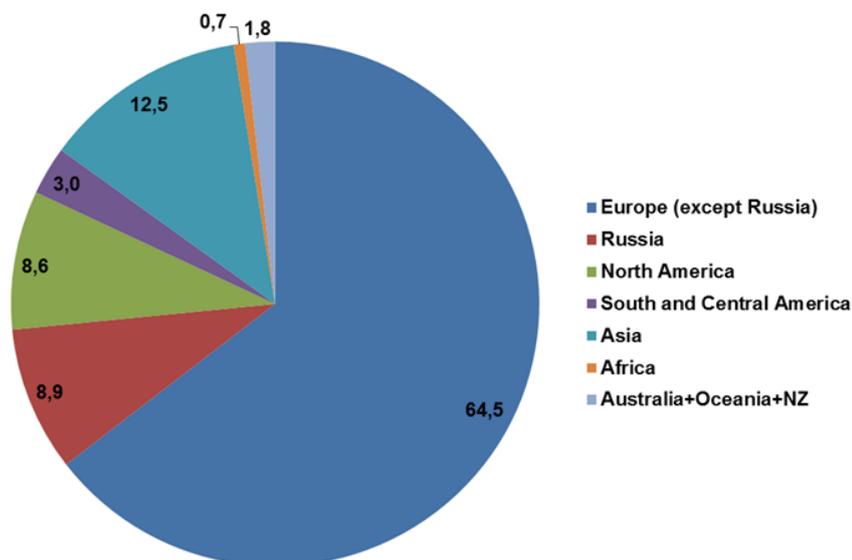
Share in Prague tourism from different parts of the world

Looking at the different continents and parts of the world we can see that the **most visitors** come to Prague **from other European countries**. The number of European visitors increased over the past year by 178,618 and their share of 64.5% in the total number of non-residents remains roughly at the same level as last year.

Prague has also had rapid gains in visitors from Asia, with a total growth of 96,649 visitors and a share in total visitor numbers that increased by 1.1%.

If we isolate Russia as a separate area, we can see a decline in visitors of 68,618, dropping Russia's share in total foreign visitor numbers by nearly 2%.

Prague 2014 – Inbound markets by volume



Absolute growth in foreign visitors to Prague

The total growth in non-residents for 2014 came to **267,098 visitors (+5.3%)**.

Fastest growing markets by volume compared to 2013:

Country	Growth	Growth (%)
Germany	56,108	+8.3
China	35,049	+30.6
Republic of Korea	33,717	+36.9
USA	29,861	+8.3
Poland	25,658	+15.8
Other European countries*	19,261	+20.7
Italy	18,393	+6.4
United Kingdom	17,398	+5.4
Other Asian countries*	15,903	+10.6
Israel	14,460	+17.4

*Note: "Other European countries" includes European countries that are not individually monitored by the Czech Statistical Office.

** Note: "Other Asian countries" do not include China, India, Israel, Japan or South Korea, which are tracked separately by the Czech Statistical Office.

The greatest losses in inbound guests compared to 2013 are from the following countries:

Country	Decline	Decline (%)
Russia	-68,618	-12.7
Ukraine	-19,704	-20.3
France	-17,239	-7.3
Japan	-10,883	-10.3
Denmark	-9,710	-12.6
Other American countries*	-2,732	-4.2
Malta	-2,008	-43.6
Norway	-1,796	-3.0
Switzerland	-1,042	-1.5

* Note: "Other American countries" includes American countries that are not individually monitored by the Czech Statistical Office.

Total number of overnight stays from foreign visitors

The number of overnight stays from foreign visitors in collective accommodation establishments came to **13,381,733** for 2014, which represents a **growth of 324,802 overnight stays (+2.5%)**.

Foreign visitors are responsible for **90.7% of the total number of overnight stays**.

As in previous years, **Russia** held onto its lead in the number of overnight stays in 2014, despite its decline in this area by 353,168 (-15.8%). The top ten countries remained the same as last year, including the order, but Russia's lead on Germany dropped to just 199,866 nights (*last year it was 650,000 nights*). The USA trailed behind Germany in third place by about 750,000, similar to the previous year.

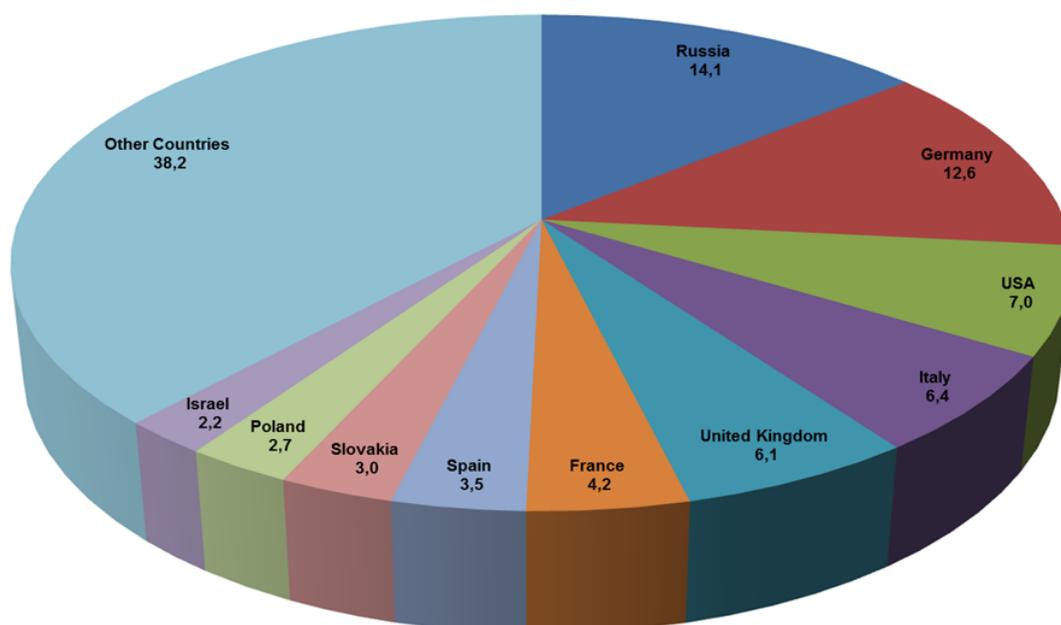
The only country in the top ten that showed a decline in overnight stays, besides Russia as previously mentioned, was France. Despite this, however, it held onto its position in sixth place.

Top markets by total nights:

Country	Number of overnight stays	Growth/Decline	Growth/Decline (%)
Russia	1,884,225	-353,168	-15.8
Germany	1,684,359	+98,592	+6.2
USA	936,466	+65,333	+7.5
Italy	859,888	+57,689	+7.2
United Kingdom	819,594	+43,208	+5.6
France	558,607	-58,714	-9.5
Spain	462,493	+16,887	+3.8
Slovakia	398,819	+28,291	+7.6
Poland	367,623	+54,497	+17.4
Other Asian countries*	361,139	+25,830	+7.7

* Note: "Other Asian countries" do not include China, India, Israel, Japan or South Korea, which are tracked separately by the Czech Statistical Office.

Prague – Main source countries in 2014 – Share in overnight stays



Average length of overnight stays for foreign visitors

The average length of overnight stays for non-residents dropped by 0.1 night down to 2.5 nights total as compared to last year.

Visitors from Russia spent the most nights (4) in Prague on average during 2014; visitors from Malta (3.5 nights) and Israel (3.1 nights) also spent longer than average in Prague. Visitors from China and South Korea spend only a short time with us (1.8 nights), as do visitors from Slovakia and Austria (1.9 nights).

Comparing Prague tourism with total tourism in the CR

Collective accommodation establishments welcomed a total of **15,587,076 visitors** in 2014 throughout the Czech Republic, representing an **increase of 179,405 visitors (1.2%)**.

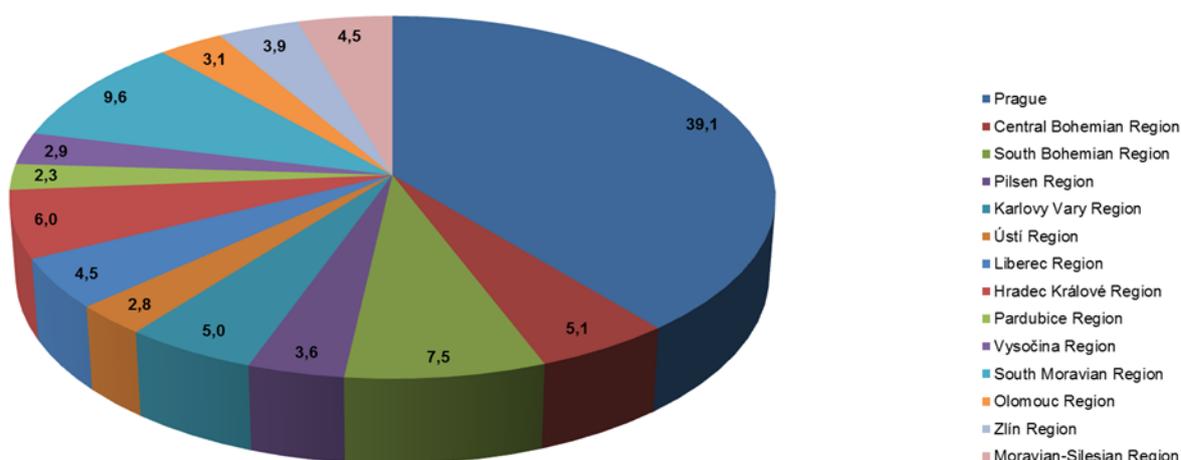
Non-residents make up 51.9% of this number and residents 48.1%.

The **most visitors** came to the Czech Republic from **Germany** (1,553,370), with Russia in second place (691,198) and Slovakia in third (492,550).

The total number of visitors to Prague holds a share of **39.1%** in the total number of visitors to the Czech Republic and the **number of non-resident visitors** to Prague holds a share of **65.7%** in the total number of visitors to the entire country.

The following graph shows that Prague was the region with the highest visitor numbers.

Regional breakdown by total guests in the Czech Republic in 2014



The number of overnight stays in collective accommodation establishments throughout the Czech Republic came to **42,946,929** for 2014, which is **361,350 nights (0.8%) less** than the previous year.

Prague held a 34.3% share in the total overnight stays in the country, including a **60.5%** share in non-resident overnight stays in the Czech Republic.

The Czech Republic as a whole therefore had **more visitors** in 2014, but the **number of overnight stays decreased**. The country welcomed 3.1% more foreign visitors, but they made 0.2% fewer overnight stays. Czech visitors in collective accommodation establishments numbered 0.9% less and the number of overnight stays also dropped by 1.5%.

Seven regions experienced increases in visitor numbers and Prague was one of the most successful.

*Based on data from the Czech Statistical Office published on 31 March 2015
Martina Kuřtková – Prague City Tourism*