

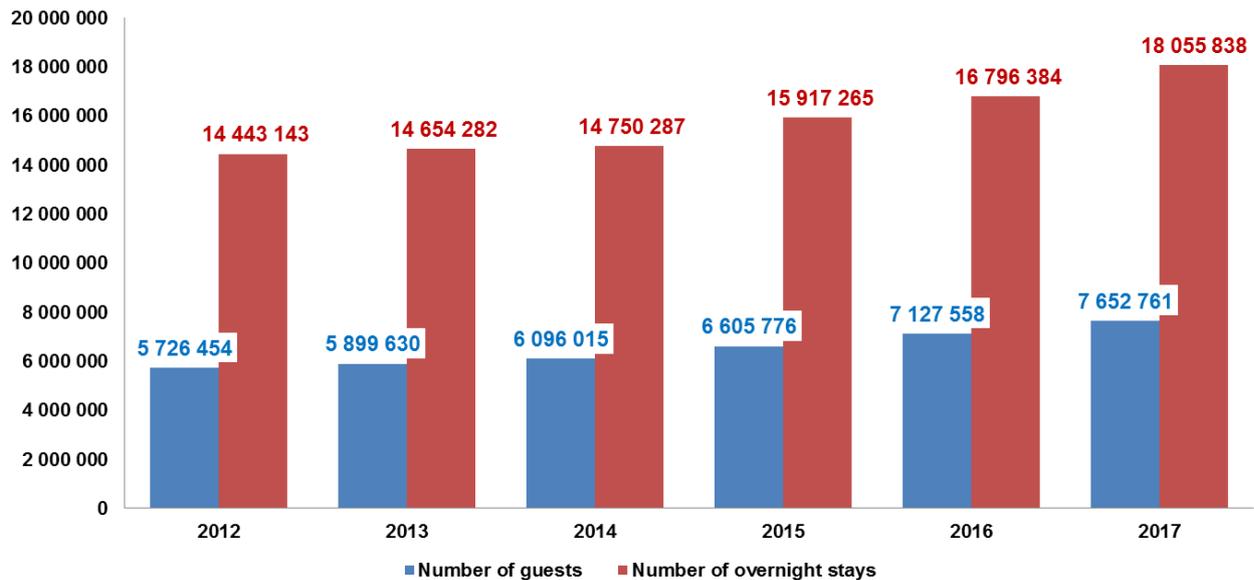
Inbound Tourism – Prague, 2017 – Overall Assessment

Facts and Figures:

- Total visitors: 7,652,761
foreign: 6,562,518 (85.8%)
domestic: 1,090,243 (14.2%)
- Total visitor growth in Prague: 525,203 visitors (7.4%)
foreign growth: 451,756 visitors (7.4%)
visitors from CR growth: 73,447 visitors (7.2%)
- Greatest number of visitors: third quarter, August and July
- Lowest number of visitors: first quarter, January and February
- Most foreign visitors: Germany (13.9%), USA (7.2%), Great Britain (6.1%), Russia (5.9%)
- Prague, most popular destination for foreign visitors and second most popular for Czech residents
- Ratio of Europeans to all foreign visitors: 68.3% (including Russia)
ratio of Asians to all foreign visitors: 18.3%
- Above-average increases in visitors from Russia (38.6%), South Korea (26.8%) and China (25.9%)
- One quarter of Asians came from South Korea and 23.7% from China
- Total overnight stays: 18,055,838
foreign: 16,132,282 (89.3%)
from CR: 1,923,556 (10.7%)
- Total growth in Prague overnight stays: 1,259,454 nights (7.5%)
foreign growth: 1,114,579 nights (7.4%)
residents growth: 144,875 nights (8.1%)
- Most overnight stays for foreign visitors: Germany (13%), Russia (9.3%), USA (7.1%)
- Huge increase in the number of overnight stays by Russians: +47%
Ratio of Russian visitors in the total growth in overnight stays: 38.1%
- Average length of overnight stays: 2.4 nights
non-residents: 2.5 nights; residents: 1.8 nights
- Longest average length of stay: Russia (3.9 nights), Israel (3.3 nights)
Shortest average length of stay: Republic of Korea (1.7 nights) and China (1.8 nights)
- Prague currently has 787 collective accommodation establishments registered, with 41,617 rooms, 90,891 beds and 1,096 spots for tents and caravans
- Hotel room use was at 69.5%, with net bed use at 67%

For the fifth year in a row, Prague achieved **record numbers of overnight stays as well as total visitor numbers**. Czech residents and foreign tourists alike showed growing interest in the Czech capital. Last year, 2017, saw a **major turnaround in visitors from Russia and ever-increasing interest from South Korea and China**. As usual, Prague became the most frequently visited city and region in the Czech Republic.

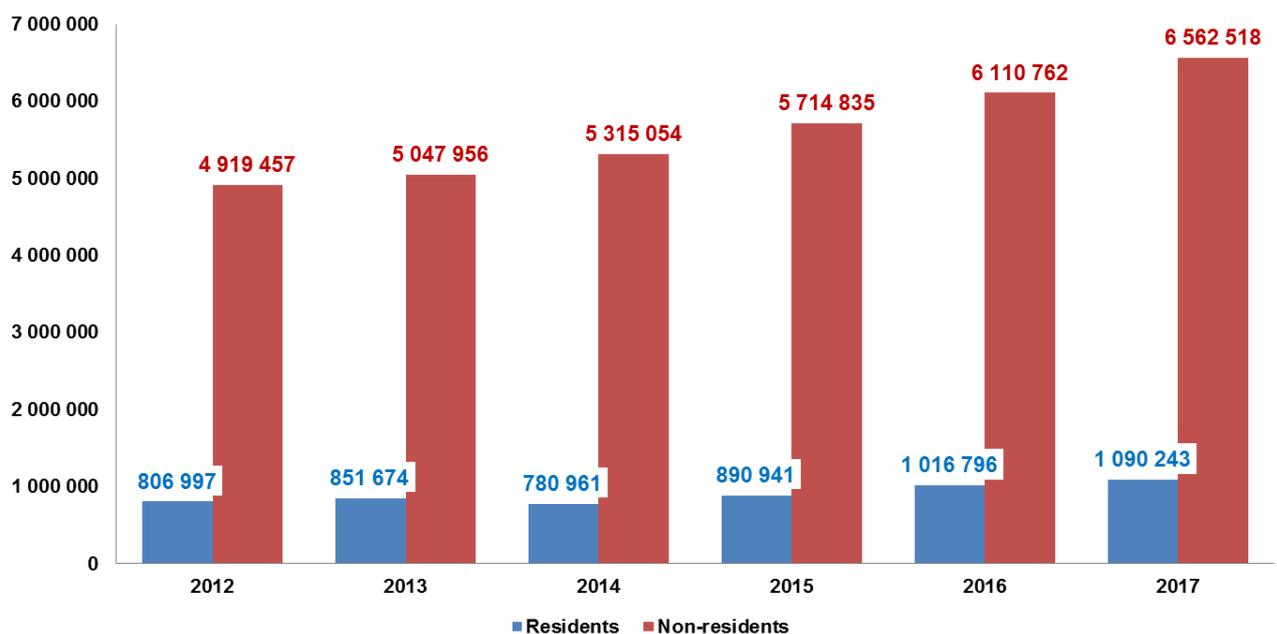
Prague - Number of guests and overnight stays
2012-2016



Visitors

Prague hotels, pensions, hostels, campgrounds and other accommodation facilities welcomed a total of **7,652,761 visitors** during the year. As in previous years, the **6,562,518 (85.8%)** foreign visitors to Prague made up the largest group, while **1,090,243 (14.2%) Czech residents** were registered as staying in accommodation facilities.

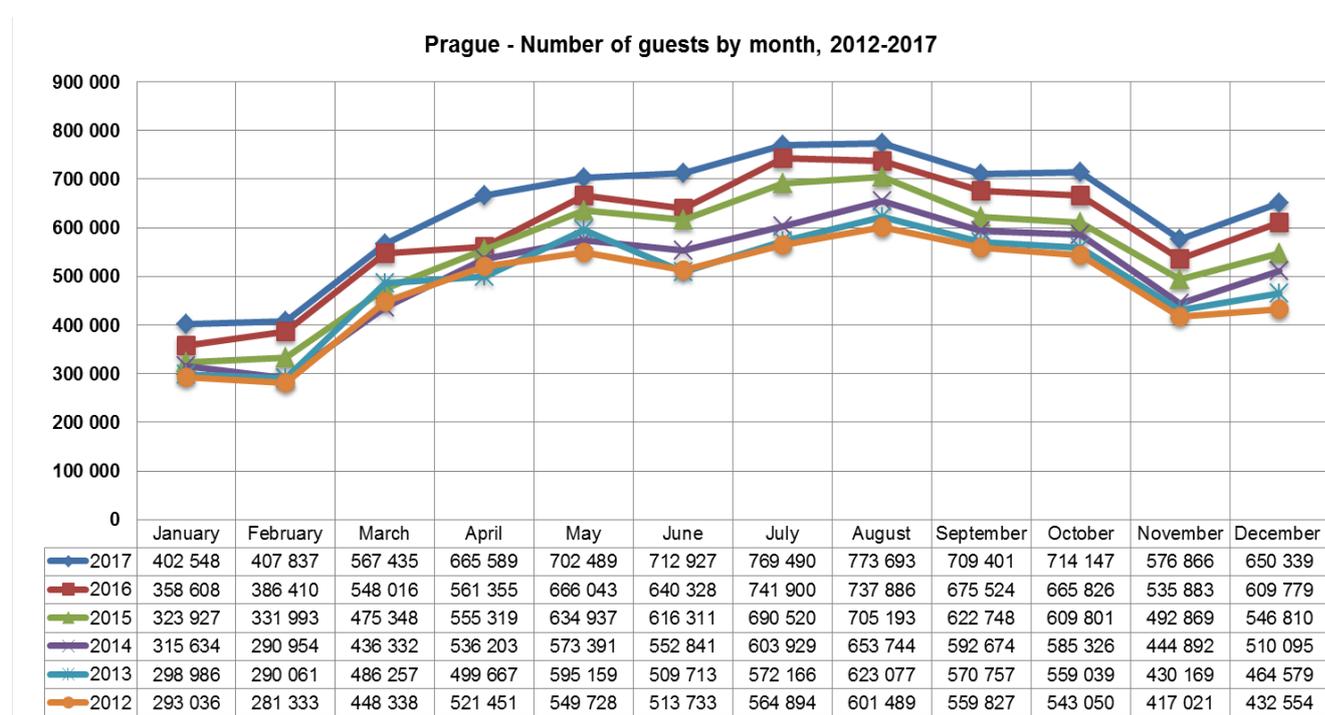
Prague - Number of guests in collective accommodation establishments
2012-2017



The **total number of visitors** in mass accommodation facilities **grew by 525,203 (7.4%) year-on-year. Non-residents increased by 451,756 (7.4%) and Czech residents by 73,447 (7.2%)** compared to 2016, meaning that foreign visitors made up 86% of the overall increase.

Visitor numbers rose throughout the year, hitting more than two million in Q2 and Q3 and coming very close in Q4 as well. **August and July** saw the **most** visitors (about 770,000 in each month), while the first two months of the year each had only about 400,000 people visiting Prague.

The greatest increase in visitors to Prague (+104,234 visitors; 18.6%) occurred in April, especially due to Easter falling in that month, as compared to March and May of 2016. More than 70,000 visitors (11.3%) flooded the city in June as well.



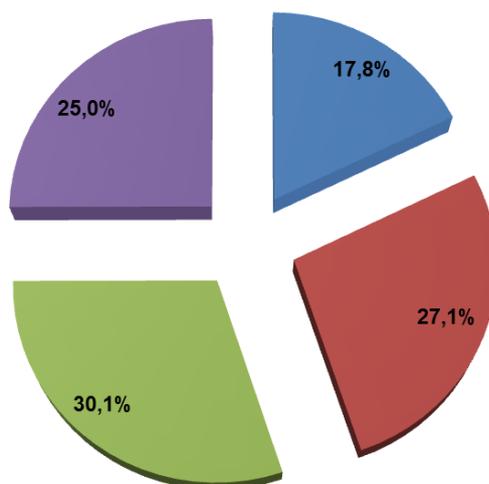
Overnight Stays

The **total number of overnight stays** passed the **18 million mark, with 16,132,282 (89.3%) non-residents and nearly 2 million (10.7%) Czech residents.** The number of overnight stays **grew by 1,259,454 (7.5%)** as compared to 2016.

The total increase in overnight stays was made up of over one million foreign visitors and 144,875 Czech residents.

30.1% of all overnight stays in Prague took place between July and September, 1,902,385 of them in August alone. On the other end of the scale, February had nearly one million fewer overnight stays.

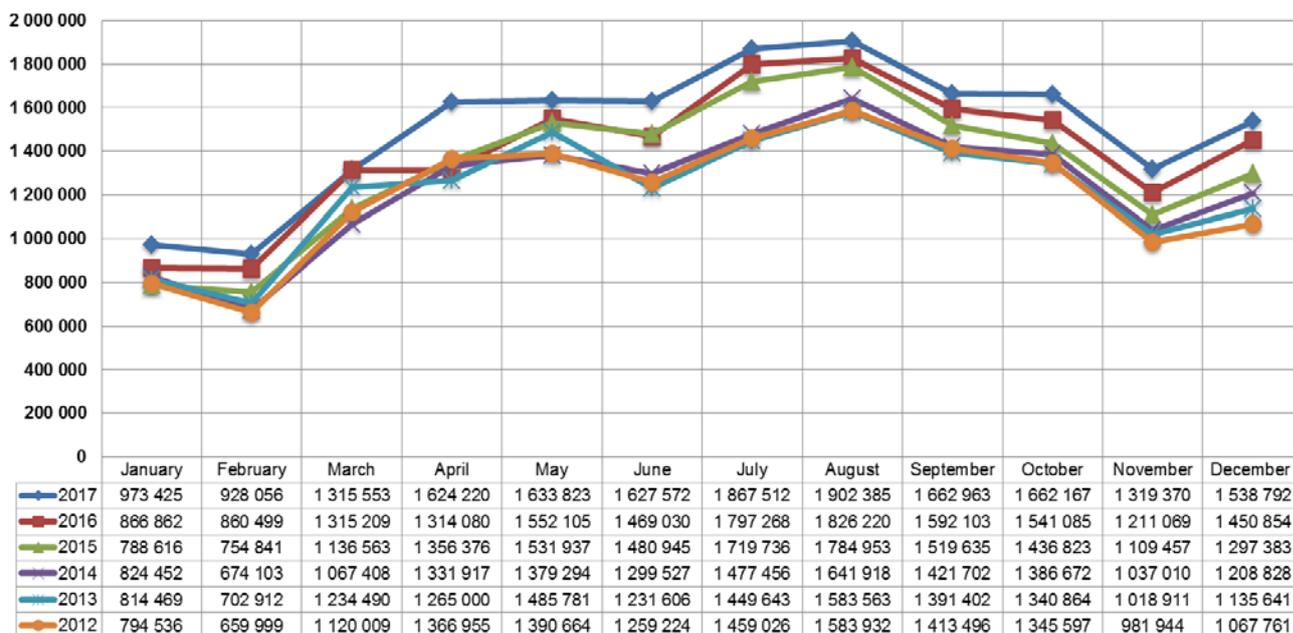
Prague 2017 - Quarterly share in overall number of overnight stays



■ Q1 - 3,217.034 bednights ■ Q2 - 4,885.615 bednights ■ Q3 - 5,432.860 bednights ■ Q4 - 4,520.329 bednights

The number of overnight stays grew in all months being analyzed. The increase for April reached over 300,000 stays (23.6%), with June topping 158,000 (10.8%).

Prague - Overnight stays by month, 2012-2017



The **average length of stay** has remained practically unchanged in recent years.

Total: 2.4 nights

Foreign: 2.5 nights

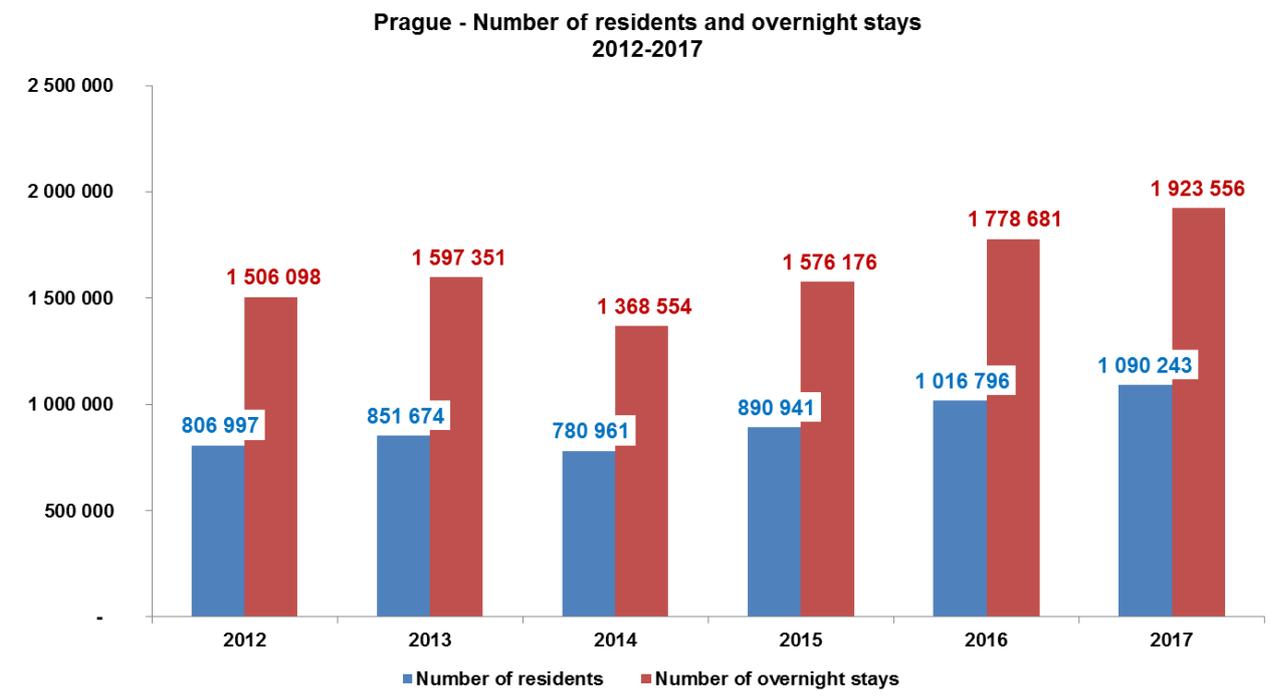
Residents: 1.8 nights

1. Domestic visitors to Prague

In 2017, Prague was the second most popular destination for Czech tourists, after the South Moravia region. Given the extremely high interest from foreign tourists in visiting the capital, Prague is also the region where Czech and Moravian tourists make up the lowest proportion (14.2%).

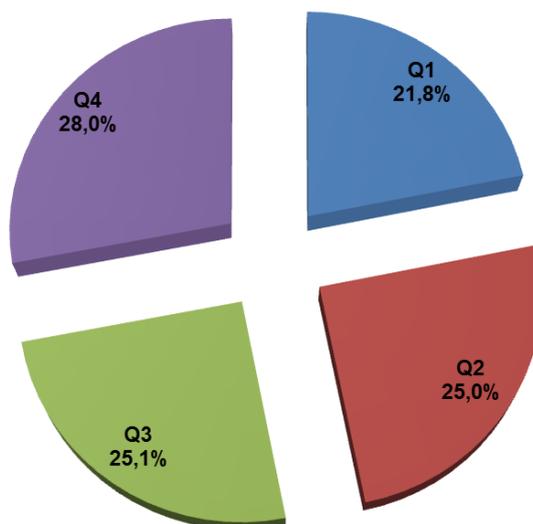
Visitors from within the **Czech Republic increased by 7.2% year-on-year** (73,447), with a total of **1,090,243 domestic tourists** staying in Prague's collective accommodation facilities. Other than a minor drop in February, the number of visitors increased during the entire year.

Domestic tourists spent a total of **1,923,556 nights** in Prague between January and December, which is **8.1%** (144,875 nights) **more** than the previous year. They made up 10.7% of all overnight stays.



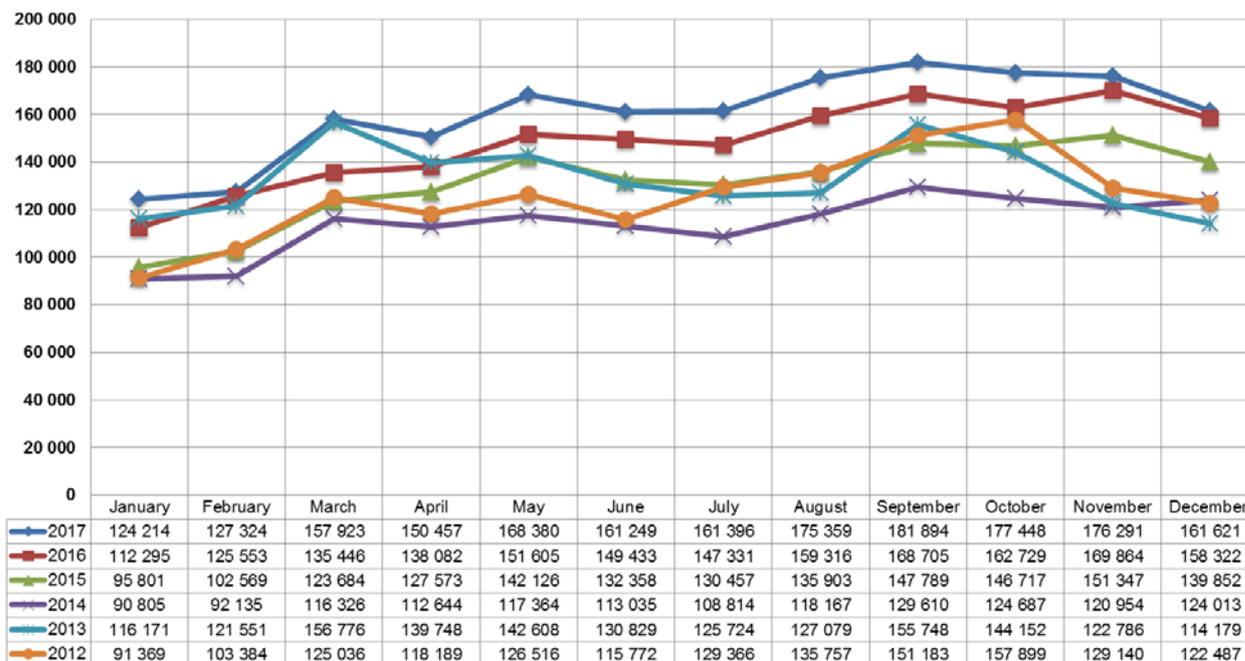
As in previous years, visitors from other regions of the Czech Republic came to the capital city especially in the last part of the year, with over 100,000 each month between September and November, and nearly 100,000 in December. March saw a significant increase of nearly 14,000 visitors (17.7%).

Prague 2017 - Resident visitors by quarter



Residents made the most overnight stays between August and November, reaching 180,000 nights in September. Overnight stays by Czech residents increased year-on-year in each month of 2017. March held the largest share in overall annual growth (15.5%).

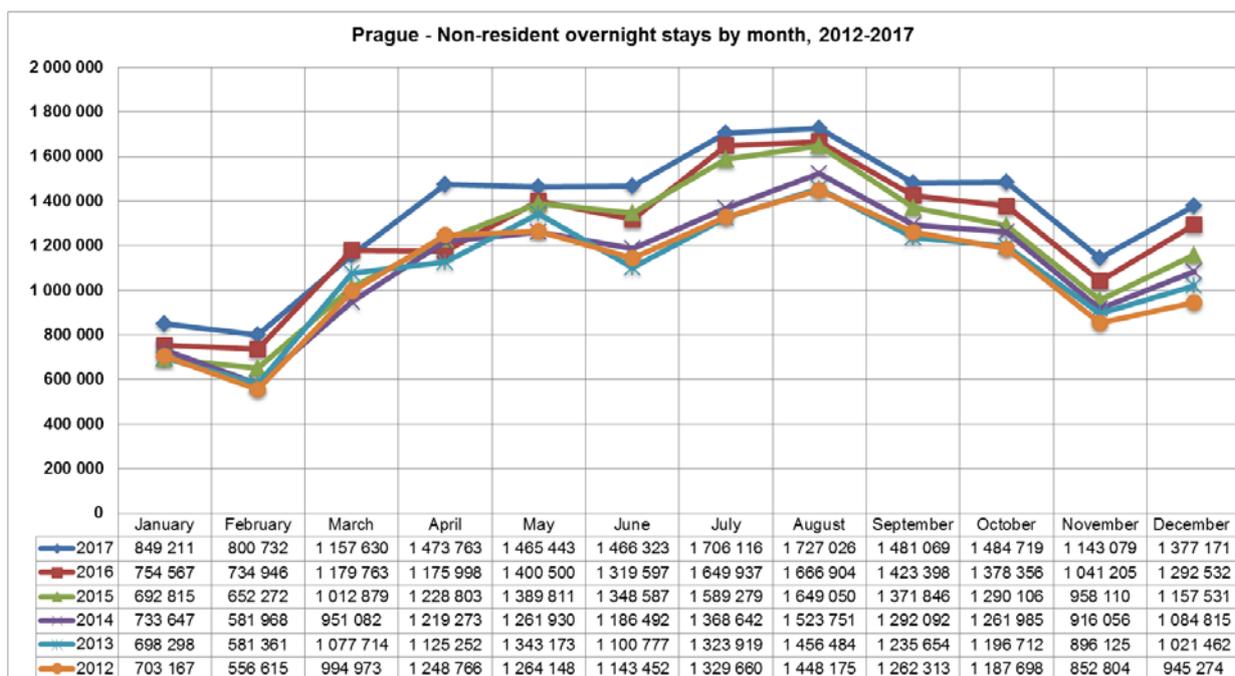
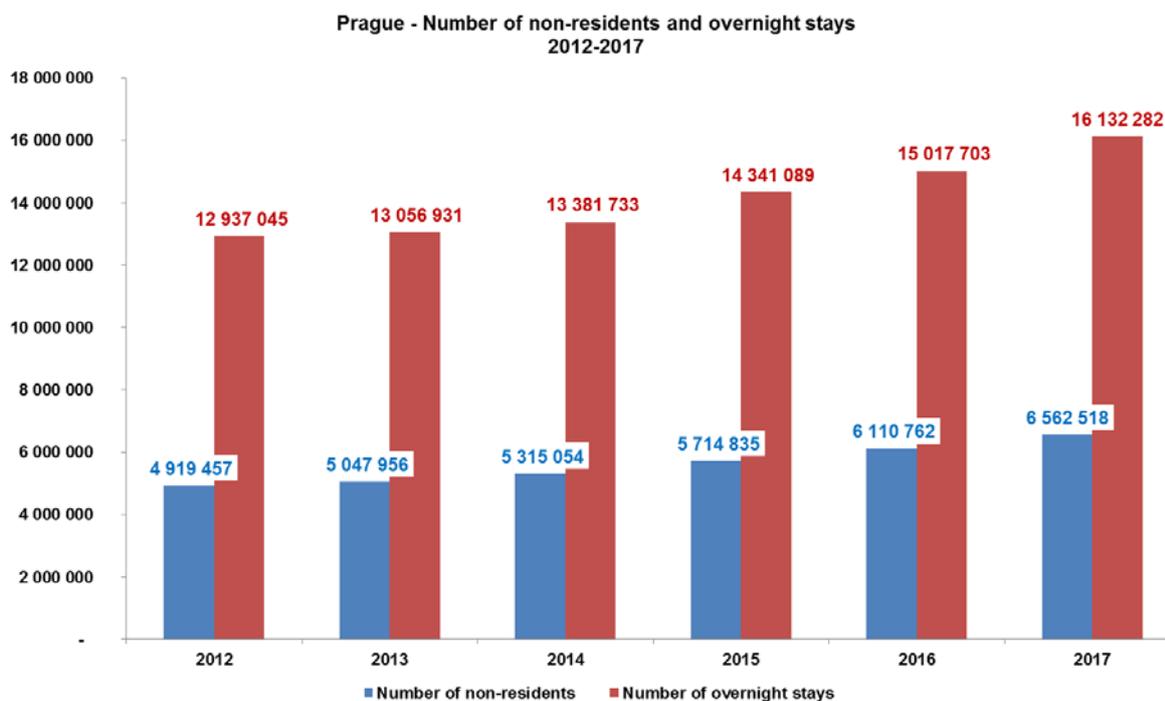
Prague - Resident overnight stays by month, 2012-2017



2. Foreign visitors to Prague

Prague was the most popular region for foreign visitors, as usual. It was also the region with the greatest percentage of foreign visitors (85.8%).

Statistics on non-residents report **6,562,518 visits** and **16,132,282 overnight stays** during the course of 2017. This meant an **increase of 451,756 (7.4%)** among foreign visitors and **1,114,579 (7.4%)** of overnight stays by foreign visitors.



As expected, the **height of Prague's tourist season** came in **July and August**, when in each month the number of foreign visitors passed 680,000 and overnight stays by foreign visitors topped 1.7 million.

In contrast, only about 330,000 non-residents chose to visit in January or February, which are the only two months when the number of overnight stays remained under one million.

Source Countries

The TOP 10 source countries based on number of visitors remain unchanged from the previous year. The only changes within this group involved Russia, South Korea and China moving up.

Top 11 markets with the highest total visits – 2017:

Country	Number of guests	Growth/Decline	Growth/Decline (%)	Proportion of non-resident visitors (%)
Germany	913,950	36,598	4.2	13.9
USA	472,737	19,632	4.3	7.2
United Kingdom	403,553	-6,974	-1.7	6.1
Russia	389,065	108,424	38.6	5.9
Italy	322,744	20,466	6.8	4.9
Republic of Korea	299,927	63,478	26.8	4.6
Slovakia	287,641	7,162	2.6	4.4
China	284,602	58,497	25.9	4.3
France	233,691	4,858	2.1	3.6
Poland	225,120	-770	-0.3	3.4
Spain	215,500	10,996	5.4	3.3

South Korea and China are now among the ten countries with the greatest number of overnight stays, with an increase of over 20% (90,000 nights). This placed them just above Israel, even with the typically long stays (3.3 nights) from Israeli tourists.

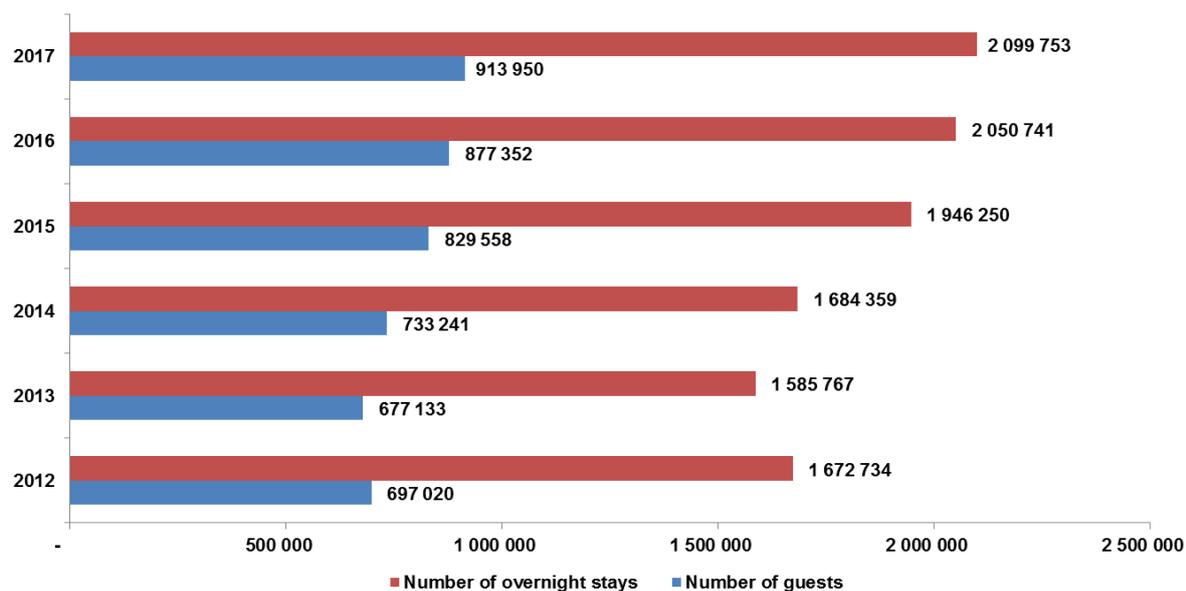
Top 11 markets by total nights:

Country	Number of overnight stays	Growth/Decline	Growth/Decline (%)	Proportion of non-resident overnight stays (%)
Germany	2,099,753	49,012	2.4	13.0
Russia	1,501,617	479,784	47.0	9.3
USA	1,138,126	46,891	4.3	7.1
United Kingdom	1,036,924	-21,646	-2.0	6.4
Italy	921,226	66,526	7.8	5.7
Spain	611,023	52,067	9.3	3.8
France	594,955	7,847	1.3	3.7
Slovakia	542,637	-131	0.0	3.4
Republic of Korea	501,524	97,057	24.0	3.1
China	500,404	93,888	23.1	3.1
Israel	496,352	25,698	5.5	3.1

Germany

Germany remained the **main source country**, leading by 441,000 visitors and nearly 600,000 overnight stays. Germans made up **13.9%** of all **foreign visitors** and **13% of overnight stays** by non-residents. The greatest number of Germans came between April and October, with over 100,000 tourists and 256,000 overnight stays in the last month of that period. Germans made up 20.4% of all tourists from Europe. The increase in visitor numbers was the fourth largest and the increase in overnight stays the sixth largest, both in absolute numbers.

Germany - Number of guests and overnight stays
2012-2017



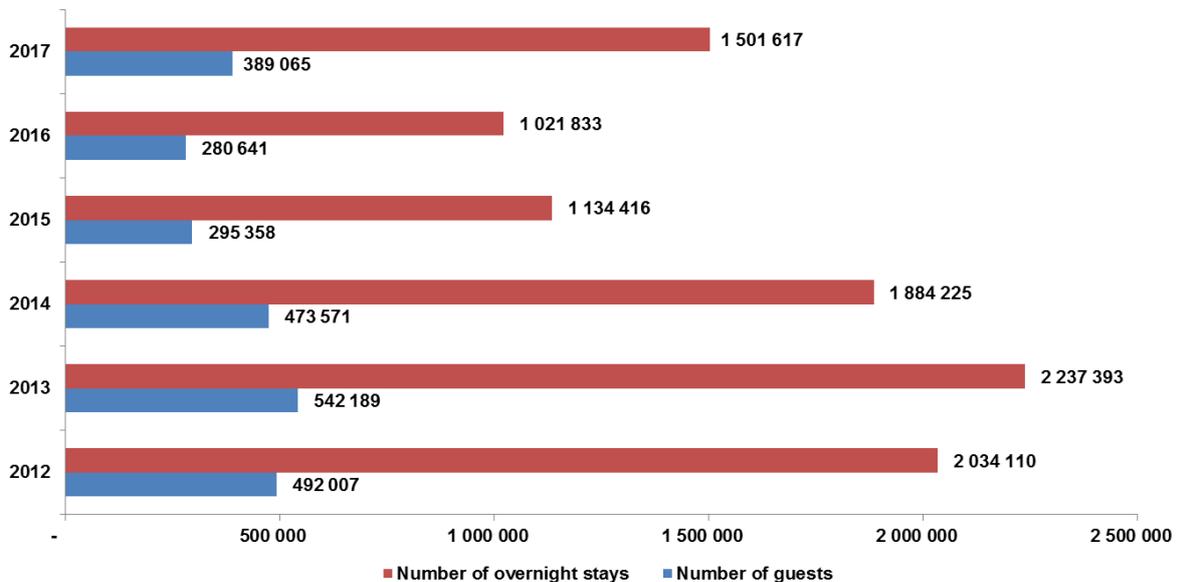
Russia

Incoming tourism from Russia rose significantly in all 12 months of 2017, continuing a trend that began in fall 2016 (after two years of falling numbers). The total **increase in Russian visitors** came to **38.6% (108,424 visitors)**. Based on number of overnight stays, Russia moved up to second place, from fourth the previous year, out of all non-residents. This was due to the huge **increase of nearly half a million overnight stays (+47%; 479,784 nights)**. Russians made up 5.9% of all foreign visitors and 9.3% of non-resident overnight stays, due to their longer-than-average stays (3.9 nights).

Russians are responsible for 38.1% of the total increase in overnight stays.

While non-residents in general preferred the summer months for a trip to Prague, Russians preferred December and January.

Russia - Number of guests and overnight stays
2012-2017



USA

Second in visitor numbers and third in number of overnight stays. About half as many tourists came from the USA as compared to Germany, making about half a million fewer overnight stays.

The number of American visitors and overnight stays rose slightly throughout the year. The main window for American tourists is between May and October.

United Kingdom

Although visitor numbers from the United Kingdom dipped slightly in 2017 after the previous year's increased interest in the Czech capital city, the United Kingdom still came in third place in terms of visitor numbers.

Fewer British tourists came in Q2 and Q3, with the greatest number in December (111,862).

Asian countries

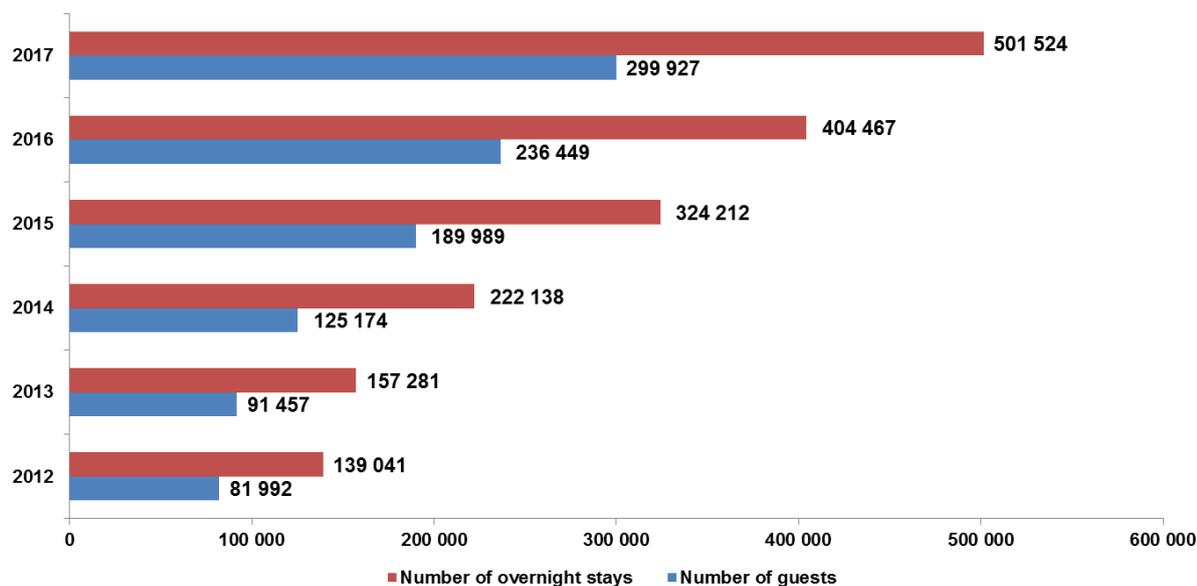
Visitor numbers from Asia rose to 1.2 million. Nearly half of those were split fairly evenly between South Korea and China.

The number of tourists from South Korea has risen 3.6 times since 2012, while the number of tourists from China has risen 2.8 times. Among the largest year-on-year increases come from these two countries: South Korea +26.8%, China +25.9%.

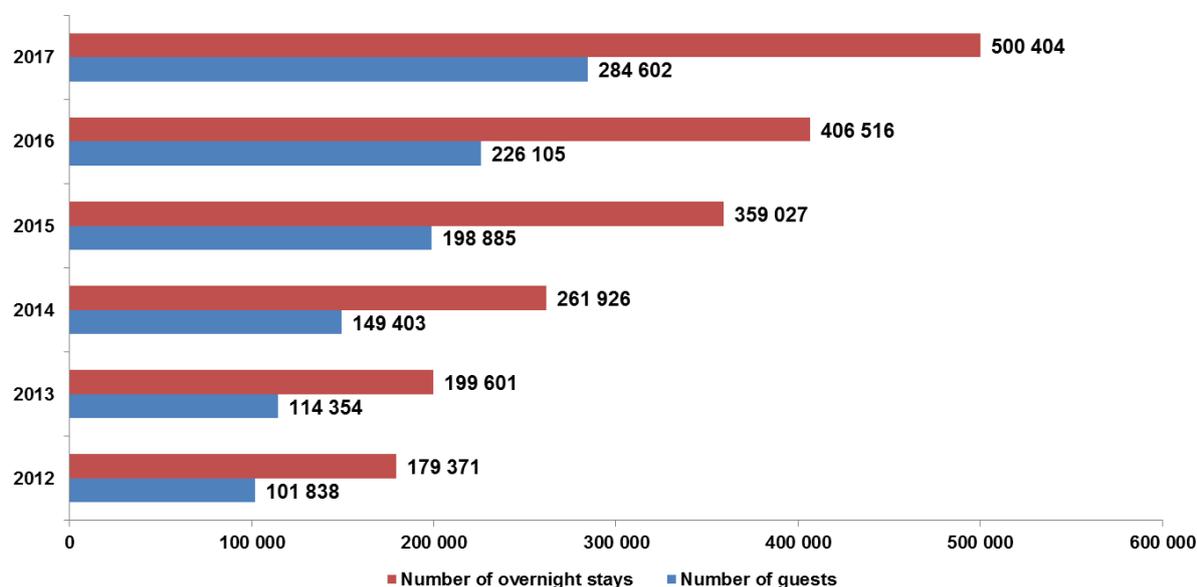
Due to the length of stays, however, South Korea comes in last place (1.7 nights) and China just above it (1.8 nights).

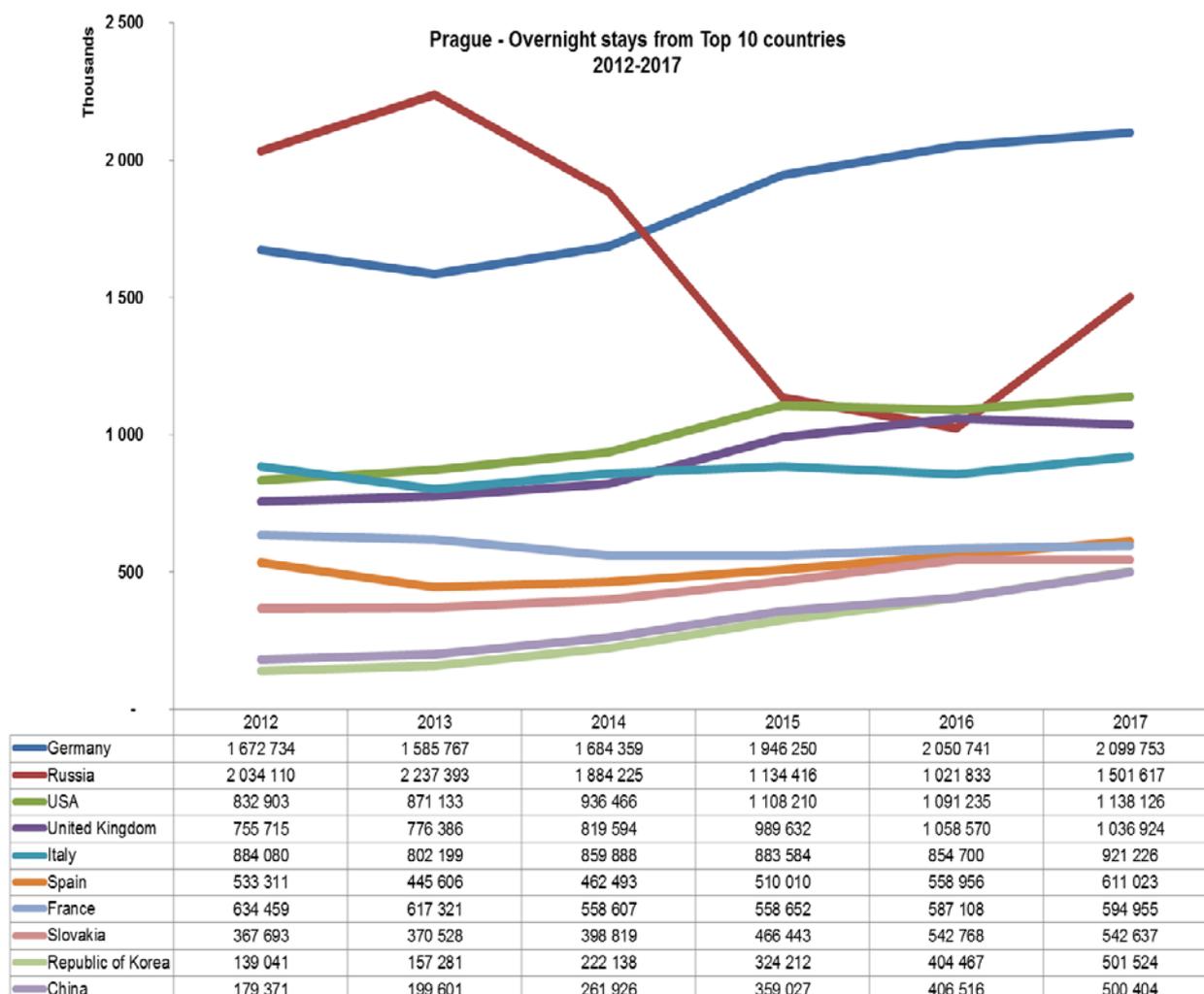
Beyond the Top 10 countries, notable growth was recorded among tourists from India (+27.7%) and Taiwan (+19.2%). Japanese tourists also came in increasing numbers (+8.6%) beginning in May.

South Korea - Number of guests and overnight stays
2012-2017



China - Number of guests and overnight stays
2012-2017





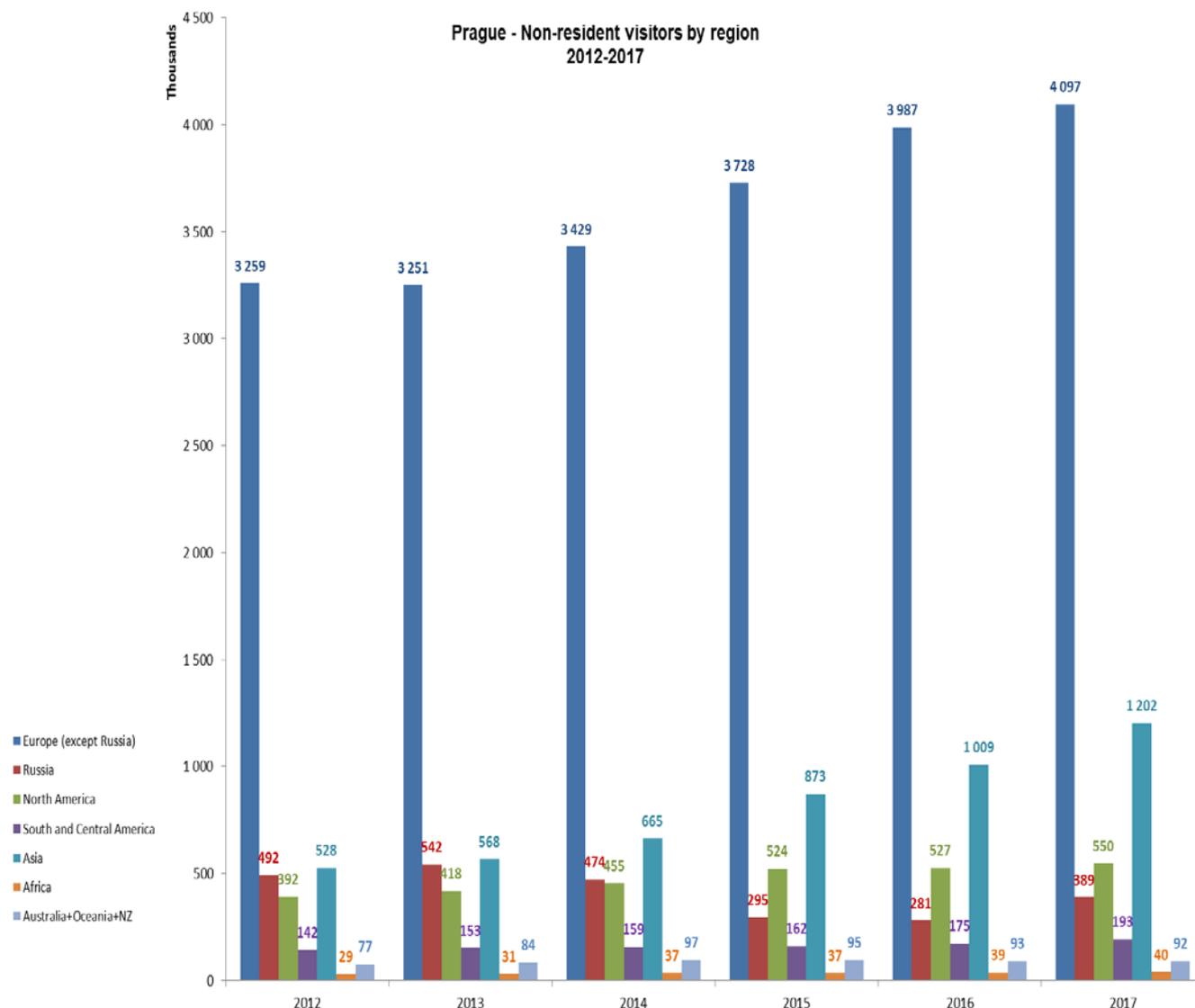
Share in Prague tourism from different parts of the world

Treating Russia as a separate region, Europeans made up 62.4%, Asians 18.3%, and North America 8.4% of total foreign visitors. Russians make up 5.9% and South and Central America make up 2.9%. Australia, Oceania and New Zealand make up 1.4% and Africa 0.6% of visitors.

Asians increased by nearly 200,000, or 19.1%, year-on-year, while Russians taken as a separate region increased by 108,424 (38.6%) and Europeans by 109,725 (2.8%).

Asian visitors overall increased by 1.8% compared to 2016, with European visitors falling by 2.8%.

The various regions give similar results when measured by number of overnight stays. Differentials always appear for Russian and Asian visitors, two groups with an average length of stay that diverges widely from the overall average. European tourists make up 61.7% of all non-resident overnight stays, while Asia makes up 15.8%, Russia 9.3%, North America 8.3%, South and Central America 2.9%, Australia, Oceania and New Zealand 1.4%, and Africa 0.6%.



Absolute growth in foreign visitors to Prague

Tourism volume from outside the Czech Republic has increased each year since 2012. In 2017 the year-on-year increase was 7.4% (451,756 people).

Fastest growing markets by volume compared to 2016:

Country	Growth	Growth (%)
Russia	108,424	38.6
Republic of Korea	63,478	26.8
China	58,497	25.9
Germany	36,598	4.2
Other Asian Countries*	21,859	12.5
Italy	20,466	6.8
USA	19,632	4.3
India	16,859	27.7
Sweden	15,347	15.1
Ukraine	14,717	19.5

The greatest losses in inbound guests compared to 2016 are from the following countries:

Country	Decline	Decline (%)
Turkey	-7,448	-8.2
United Kingdom	-6,974	-1.7
Serbia and Montenegro	-5,042	-13.7
Switzerland	-3,581	-4.5
Croatia	-2,882	-6.7
Austria	-2,612	-1.8
Lithuania	-2,232	-11.9

Greatest increases in nights compared to 2016

Country	Growth	Growth (%)
Russia	479,784	47.0
Republic of Korea	97,057	24.0
China	93,888	23.1
Italy	66,526	7.8
Spain	52,067	9.3
Germany	49,012	2.4
USA	46,891	4.3
Other Asian Countries*	45,641	11.4
Sweden	43,278	15.9
India	40,661	28.5

The greatest losses compared to 2016:

Country	Decline	Decline (%)
Turkey	-26,091	-11.0
United Kingdom	-21,646	-2.0
Serbia and Montenegro	-15,560	-15.3
Croatia	-11,503	-9.6
Poland	-9,207	-2.1

* "Other Asian countries" do not include China, India, Israel, Japan, South Korea, Tchaj-wan, Saudi Arabia or The United Arab Emirates, which are tracked separately by the Czech Statistical Office.

Comparing Prague tourism with total tourism in the CR

Incoming tourism has risen in the Czech Republic as a whole as well, with the number of tourists and overnight stays growing year-on-year in all regions.

The number of total visitors and overnight stays for the whole country both hit historical highs.

Between January and the end of December, the Czech Statistical Office recorded **20,000,561 visitors** in collective accommodation facilities. These break down into **50.8% foreign visitors** and **49.2% Czech residents**.

The Czech Republic saw an **increase of 1,611,708 (8.8%) visitors** year-on-year. **Non-residents** increased by **more than 839,028 (+9%)**, while **residents** increased by **772,680 (+8.5%)**.

Taking the Czech Republic as a whole, **Germany still comes out on top (19.3%)**, followed by other neighboring countries: Slovakia (681,917) and Poland (575,643) as well as Russia (548,318).

The vast **majority of foreigners** went to **Prague (64.6%)**, followed by the Karlovy Vary (6.4%) and South Moravia (6.3%) regions. Czech residents do not show the same strong preference for a particular region – the top three regions were South Moravia (12.7%), Prague (11.1%) and South Bohemia (10.4%).

The Czech Republic had a total of **53,219,395 overnight stays** in 2017. This breaks down into **50.7% by residents and 49.3% by non-residents**. The **total number** of overnight stays **grew by 3,522,438 (7.1%)** in comparison to the previous year. **Among foreign visitors** the number of overnight stays increased by **1,988,864 (8.2%)**, while **among domestic visitors they increased by 1,533,574 (6%)**.

Germany was also the main source country by number of overnight stays (5,760,866 nights), followed by Russia (2,560,872) and Slovakia (1,373,512).

Based on data from the Czech Statistical Office published on 3 April 2018

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