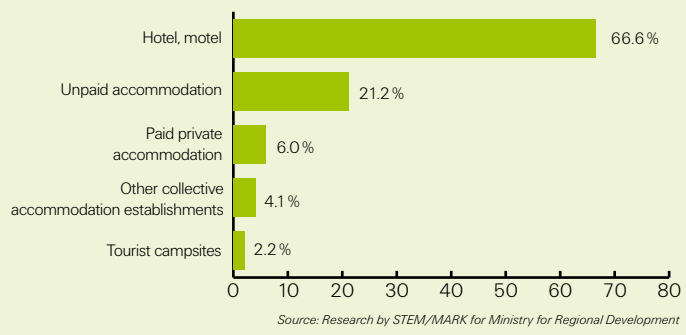


4.3 Type of accommodation

Foreign tourists most often stayed in hotel, motel (66.6%). 21.2% of foreign tourists used some kind of unpaid accommodation (e.g. stayed at friends or relatives). 6% of foreign tourists stayed in paid private accommodation (rented flat or room), 4.1% of respondents chose other collective accommodation establishments and 2.2% of foreign tourists stayed in tourist campsites.

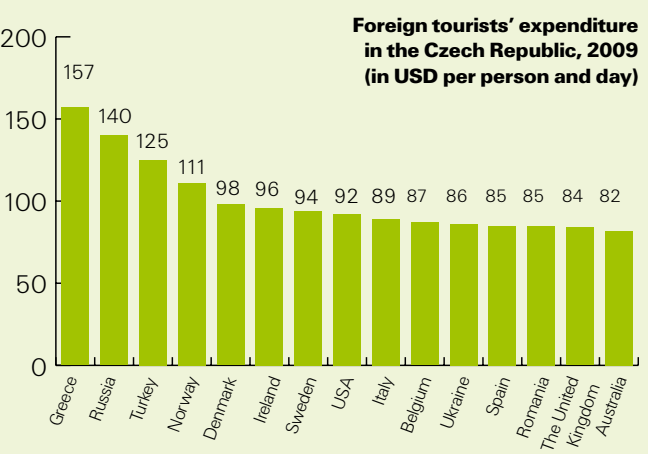


4.4 Expenditure of foreign visitors

Total expenditure of foreign visitors/person/day:

Foreign tourists	Expenditure per person and day - during the stay in the Czech Republic	1,564.9 CZK	80.8 USD
One-day visitors	Expenditure per person and day - during the stay in the Czech Republic	1,884.5 CZK	97.3 USD

Source: Research by STEM/MARK for Ministry for Regional Development
Notes: Exchange rate: 2009 average 19.373 CZK/USD (Source: www.cia.gov)



5 DOMESTIC AND OUTBOUND TOURISM

Number of holiday or leisure trips of 4 or more consecutive overnight stays (thous.), Czech citizens 2004-2009



Long trips of Czech residents (of 4 or more consecutive overnights stays) abroad by country of destination, in 2009 (TOP 14)

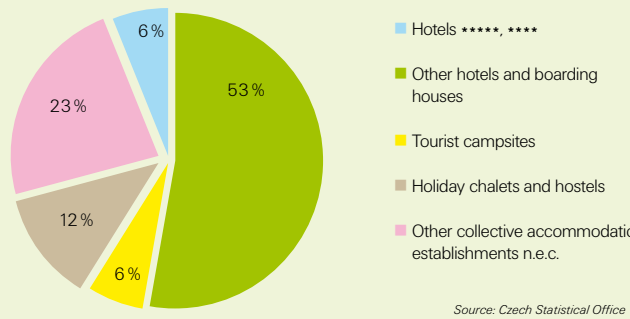
Country	Number of trips (thous.)	Country	Number of trips (thous.)
1. Croatia	814.0	8. The United Kingdom	145.0
2. Slovakia	662.0	9. Hungary	119.0
3. Italy	553.0	10. Spain	118.0
4. Greece	393.0	11. Bulgaria	98.0
5. Austria	257.0	12. Germany	95.0
6. France	184.0	13. Tunisia	85.0
7. Egypt	177.0	14. Turkey	83.0

Source: Czech Statistical Office



6 ACCOMMODATION IN THE CZECH REPUBLIC

Type of collective accommodation establishments, Czech Republic 2009

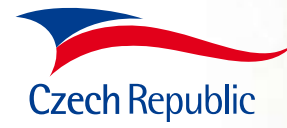


Capacity survey of collective accommodation establishments in the Czech Republic 2009

	Number of accommodation establishments	Number of beds	Number of foreign tourists
COLLECTIVE ACCOMMODATION ESTABLISHMENTS, TOTAL	7,557	463,087	6,032,370
HOTELS AND SIMILAR ACCOMM. ESTABLISHMENTS, TOTAL	4,469	260,736	5,609,025
Including:			
Hotels *****	46	12,232	705,350
Hotels ****	425	58,469	2,422,593
Other hotels and boarding houses	3,998	190,036	2,481,082
OTHER COLLECTIVE ACCOMM. ESTABLISHMENTS, TOTAL	3,088	202,351	423,345
Including:			
Tourist campsites	485	28,282	153,943
Holiday chalets and hostels for tourists	892	53,524	34,574
Other collect. establishments n.e.c.	1,711	120,545	234,828

Source: Czech Statistical Office

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1 BASIC FACTS ABOUT THE CZECH REPUBLIC

Area: 78,866 km²
Neighbouring states: Germany, Poland, Slovakia, Austria
Population: 10,506,813
Capital: Prague (population of 1.2 million)

What we can offer to the tourists:

- 12 historical monuments on the UNESCO Heritage List
- over 200 castles, chateaux and monuments
- more than 40 protected historical towns
- 37 spas
- 80 golf courses
- 4 national parks and 25 protected landscape areas
- 8 mountain ranges
- 40,219 km of walking trails
- 37,000 km of cycling routes
- 3,092.6 km of skiing tours
- 1,800 km of horse riding routes

Accommodation facilities:

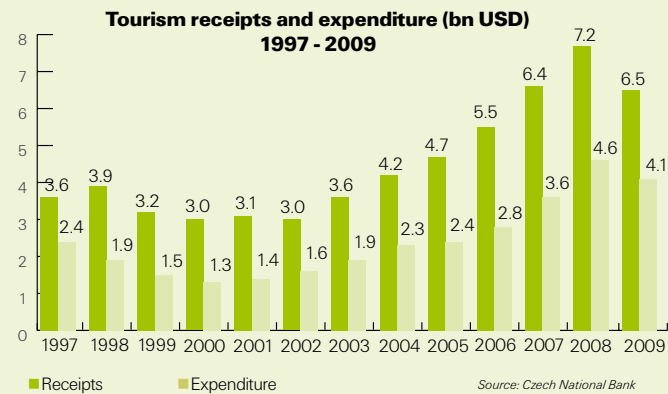
- 7,557 collective accommodation facilities
- 46 five-star and 425 four-star hotels
- 3,998 other hotels and boarding houses
- 485 tourist campsites
- 892 holiday chalets and hostels for tourists

2 ECONOMIC ROLE OF TOURISM IN THE CZECH REPUBLIC



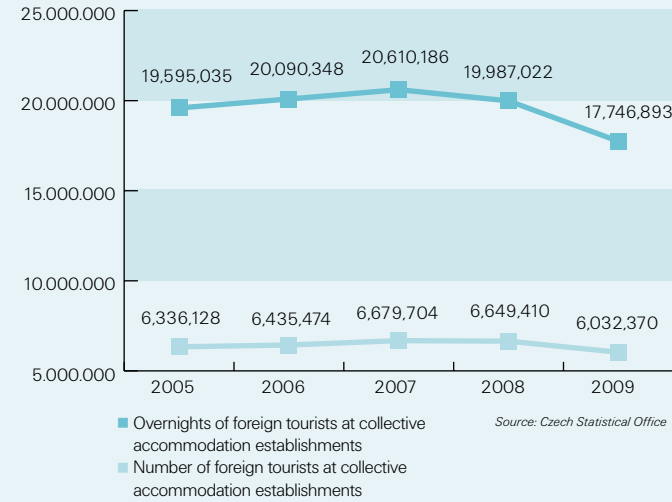
	2005	2006	2007	2008	2009
International tourism receipts (bn USD)	4.7	5.5	6.4	7.2	6.5
International tourism expenditure (bn USD)	2.4	2.8	3.6	4.6	4.1
International tourism balance (bn USD)	2.3	2.8	2.8	2.6	2.4
Share of tourism receipts on GDP (in %)	3.7	3.9	3.6	3.3	3.4
Share of tourism receipts on exports (in %)	6.0	5.8	5.2	4.9	5.7
Share of tourism receipts on service receipts (in %)	39.7	39.7	37.8	33.0	31.8

Source: Czech National Bank, Czech Statistical Office



Source: Czech National Bank

3 INBOUND TOURISM



Source: Czech Statistical Office

Foreign tourists at collective accommodation establishments in the Czech Republic by country of origin, 2009 (TOP 20)

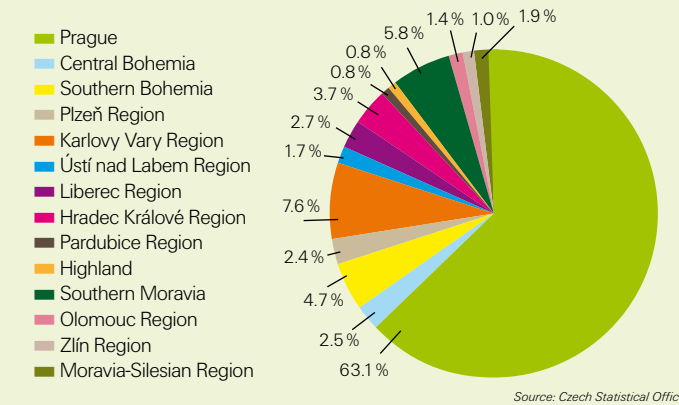
Country	Order	Number of guests	% share	Average length of stay	Order	Number of nights	% share
Foreign guests total		6,032,370	100.0%	2.9		17,746,893	100.0%
Germany	1.	1,393,112	23.1%	3.5	1.	4,851,927	27.3%
United Kingdom	2.	371,346	6.2%	2.6	4.	959,480	5.4%
Italy	3.	357,492	5.9%	2.8	3.	1,013,057	5.7%
Poland	4.	341,136	5.7%	2.1	7.	718,423	4.0%
Russia	5.	326,895	5.4%	5.1	2.	1,662,497	9.4%
Slovakia	6.	287,810	4.8%	2.0	9.	582,305	3.3%
USA	7.	274,311	4.5%	2.7	5.	742,314	4.2%
France	8.	223,901	3.7%	2.5	10.	568,151	3.2%
The Netherlands	9.	203,764	3.4%	3.6	6.	736,412	4.1%
Spain	10.	194,406	3.2%	3.0	8.	587,193	3.3%
Austria	11.	177,715	2.9%	2.0	11.	364,287	2.1%
Japan	12.	114,777	1.9%	2.0	17.	225,308	1.3%
Denmark	13.	99,563	1.7%	3.2	12.	316,392	1.8%
Hungary	14.	90,096	1.5%	2.1	20.	192,150	1.1%
Belgium	15.	87,851	1.5%	2.7	16.	241,499	1.4%
Norway	16.	85,001	1.4%	3.0	14.	253,652	1.4%
Sweden	17.	80,961	1.3%	2.7	18.	215,927	1.2%
Israel	18.	80,634	1.3%	3.9	13.	314,341	1.8%
Ukraine	19.	76,419	1.3%	3.3	15.	253,639	1.4%
Switzerland	20.	67,355	1.1%	2.5	21.	167,522	0.9%
TOP 20 countries total		4,934,545	81.8%			14,966,476	84.3%
Others		1,097,825	18.2%			2,780,417	15.7%

Source: Czech Statistical Office

4

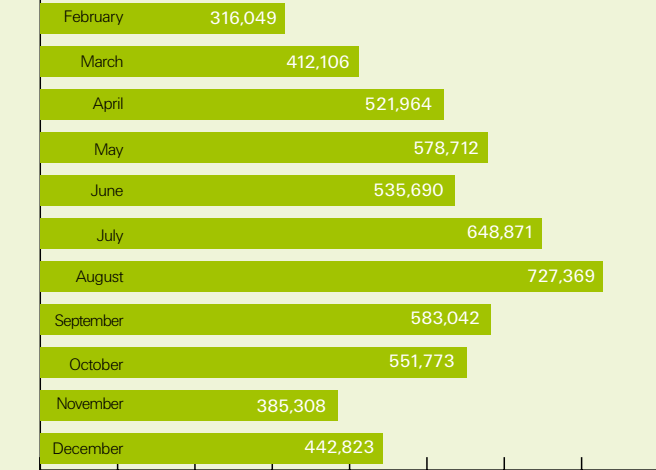


Foreign guests at collective accommodation establishments, by region, 2009



Source: Czech Statistical Office

Seasonality of foreign tourists in the Czech Republic



Source: Czech Statistical Office

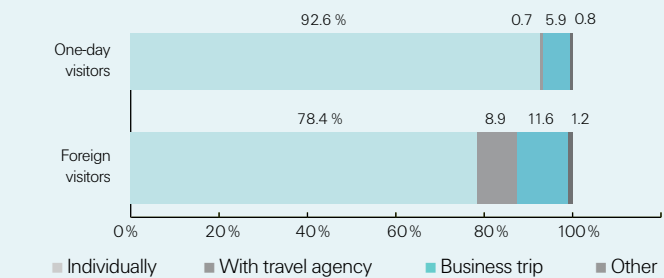
5 RESULTS OF BORDER CROSSINGS SURVEY

The survey 'Incoming Tourism - Number of Visitors and Their Expenditure in the Czech Republic' was commissioned and financed by the Ministry for Regional Development and carried out by STEM/MARK, a.s. in January 2009 - December 2009. The main objective was to find out the number of foreign visitors coming to the Czech Republic and their consumer behaviour. The data were collected in the above mentioned period at selected border crossings, selected airports and railway stations in the Czech Republic.

4.1 Organization of trip

According to the survey, 78.4% of the foreign tourists travel individually to the Czech Republic. Only 8.9% of the tourists arrived with a travel agency and 1.2% otherwise. As few as 0.7% of the one-day visitors used the services of travel agencies for organizing their visit to the Czech Republic. In contrary, the proportion of the one-day visitors travelling individually to the Czech Republic is 92.6%.

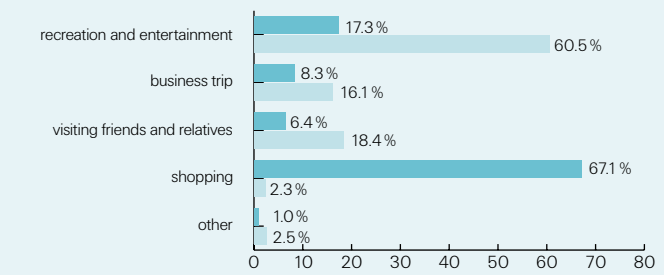
Organization of trip



Source: Research by STEM/MARK for Ministry for Regional Development

4.2 Main purposes for visit

The main reason for visiting the Czech Republic for foreign tourists was recreation and entertainment (60.5%), visiting friends and relatives (18.4%), business trip (16.1%), shopping (2.3%) and others (2.5%). The main purpose of the one-day visitors coming to the Czech Republic was shopping (67.1%), recreation and entertainment (17.3%), business trip (8.3%) and visiting friends and relatives (6.4%).



Source: Research by STEM/MARK for Ministry for Regional Development