



ANCCR CONFERENCE TRAVEL & EXPERIENCE DRIVEN SPENDING

SEPTEMBER 2025

Mgr. JANA ADAMCOVÁ

(Vice Chairwoman of the Board - Prague City Tourism)

Mgr. KATARINA KAKALÍKOVÁ

(Director, Social Impact, Europe, Mastercard Centre For Inclusive Growth)

Ing. BOŘIVOJ VOKŘÍNEK

(Strategic Advisory & Head of Hospitality Research)

Better never settles



**IF ATTRACTING TOURISTS IS NOT PART OF
YOUR STRATEGY, IT SHOULD!**

IT IS THE FUTURE ENGINE OF GROWTH!

BORN TO EXPLORE

THE WANDERLUST GENE



BORN TO EXPRESS

THE "SHOW-OFF" GENE



BEFORE SOCIAL MEDIA



*INCREASE IN
SPENDING ON
EXPERIENCES
SUPPORTED BY
SOCIAL MEDIA*

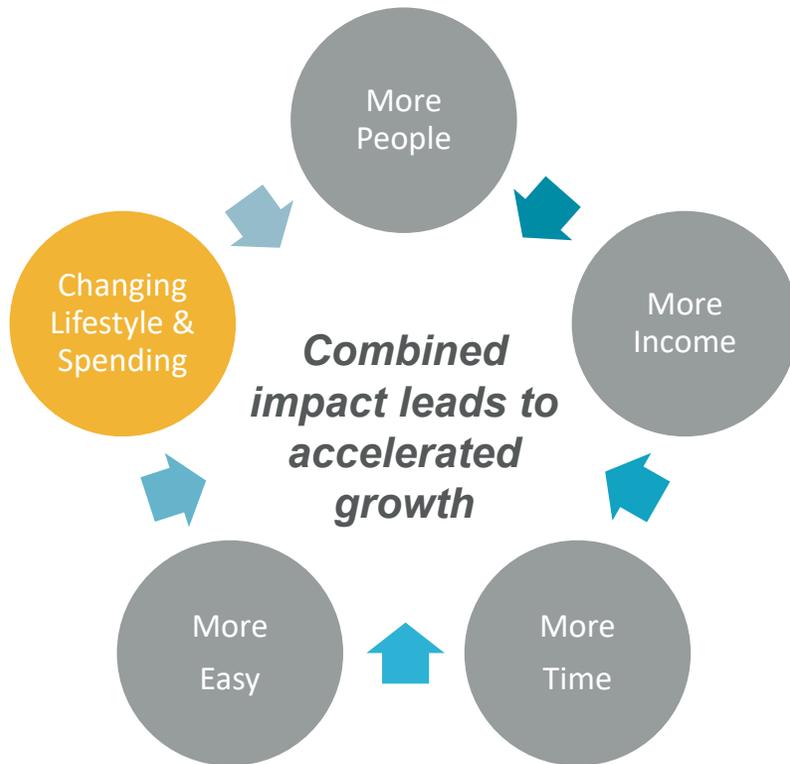
WITH SOCIAL MEDIA



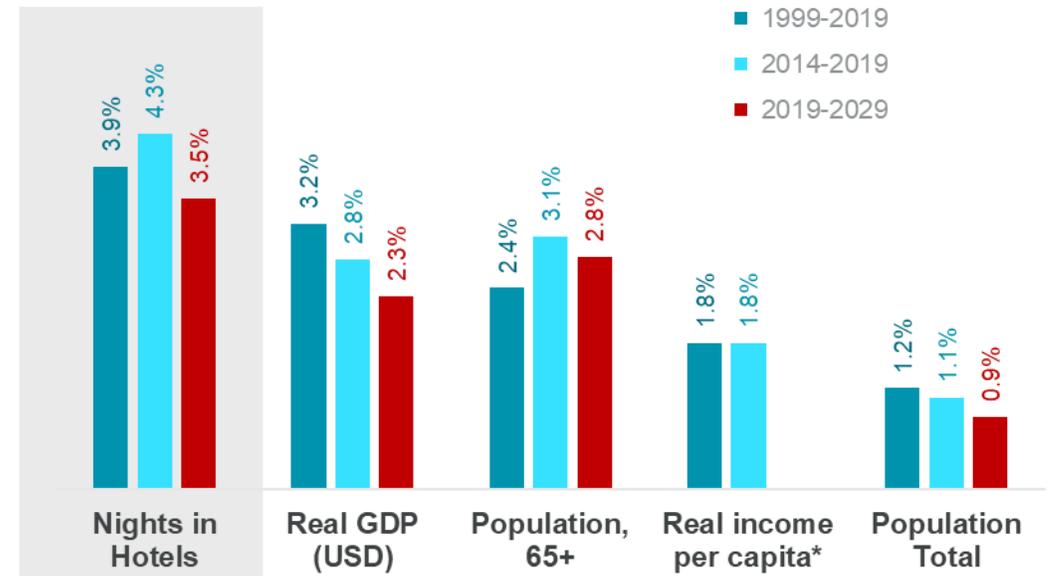
HOW DID WE GET HERE?

The drivers of tourism demand

Structural drivers of demand for transient accommodation



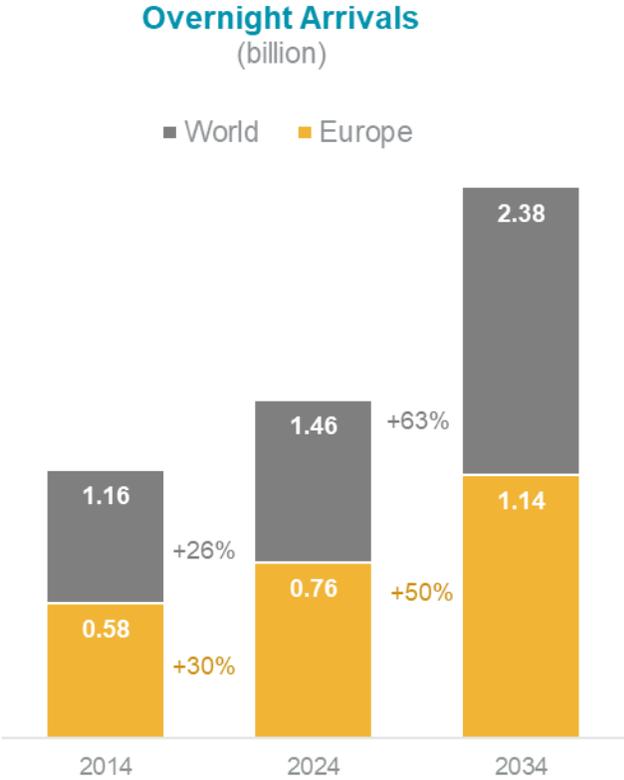
Global Hotel Demand vs Selected Drivers



WILL THIS CONTINUE?

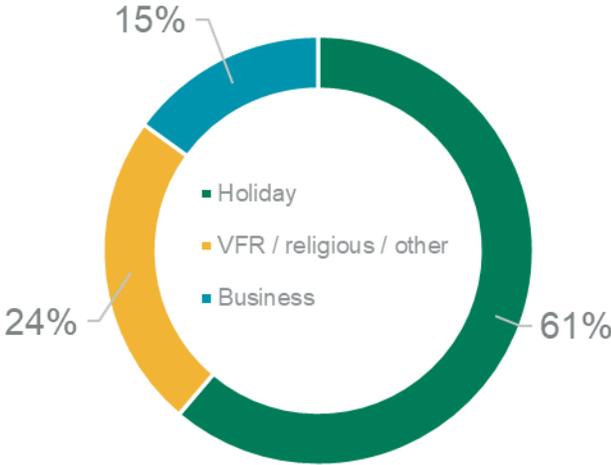
Tourism boom in past and future

Strong overnight visitation growth



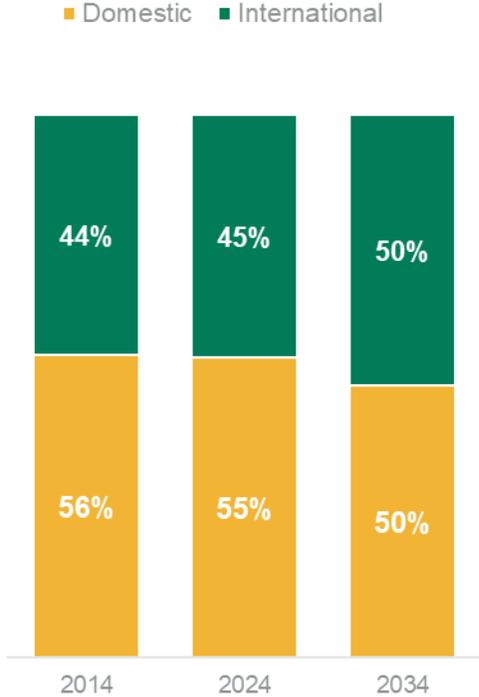
Leisure is the key driver

Tourism in Europe - Purpose of Visit
(Overnight Arrivals, % share)



Rising inbound travel

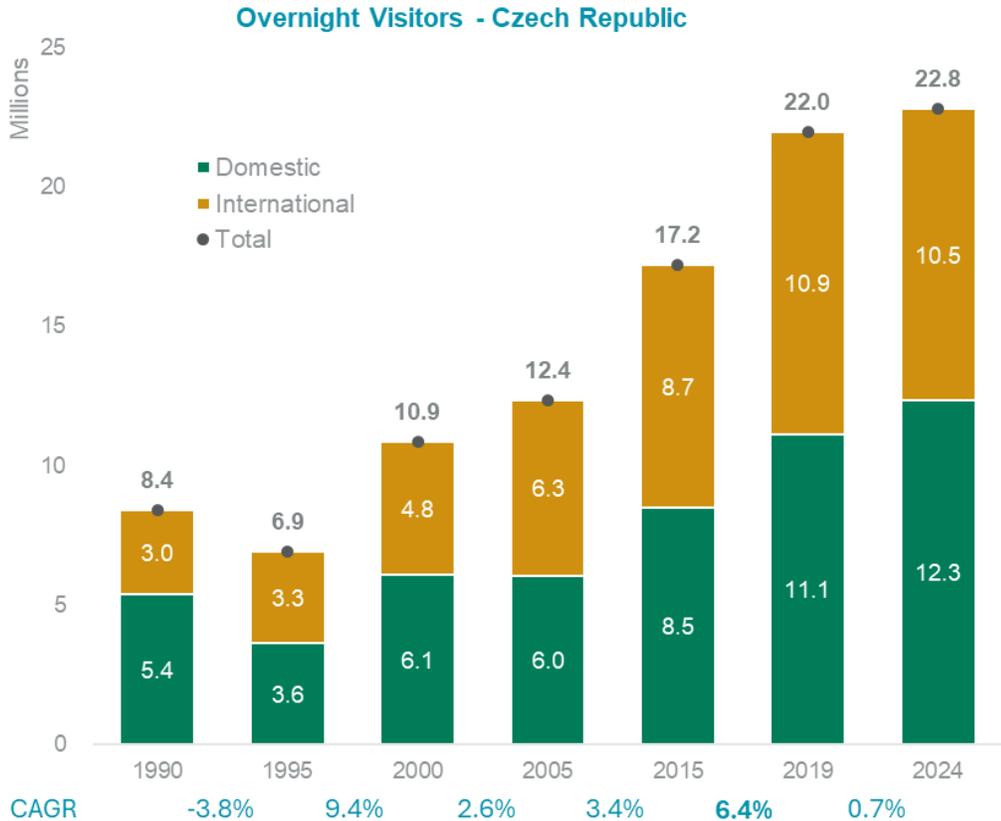
Tourism Europe - Origin
(Nights in all accommodation, %)



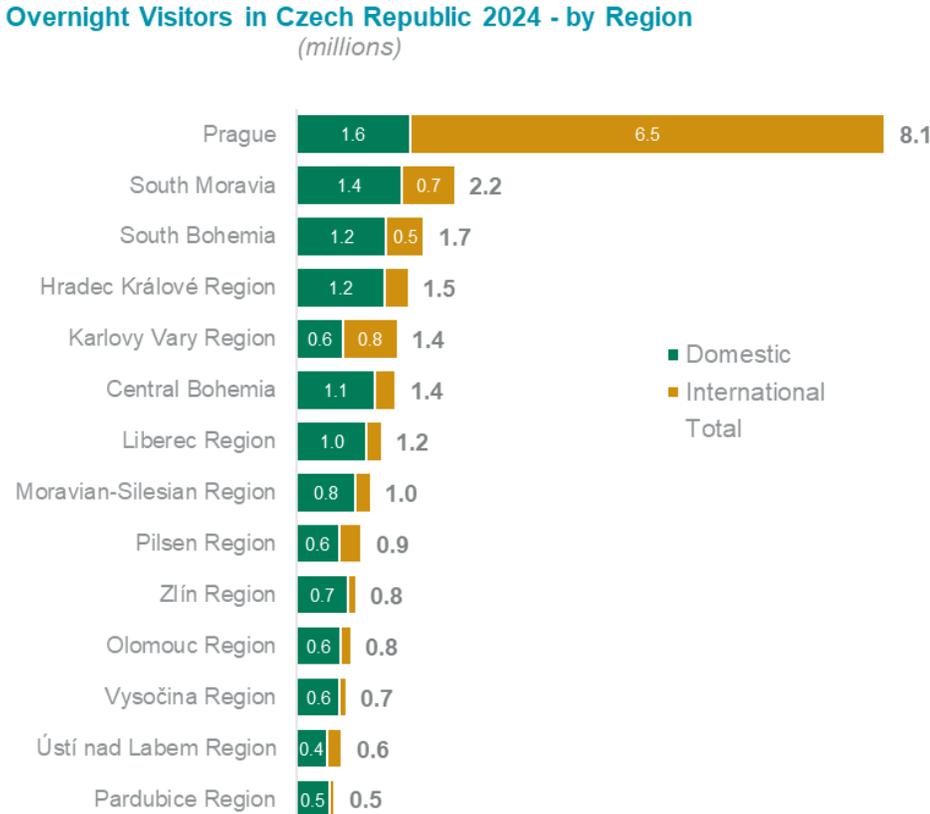
WHAT ABOUT THE CZECH REPUBLIC?

Strong growth balanced between domestic and international demand

International Demand – The Driver of Growth



Prague dominates, but other 6 regions have over one million overnight visitors



HOW DO WE COMPARE & WHAT LIES AHEAD?

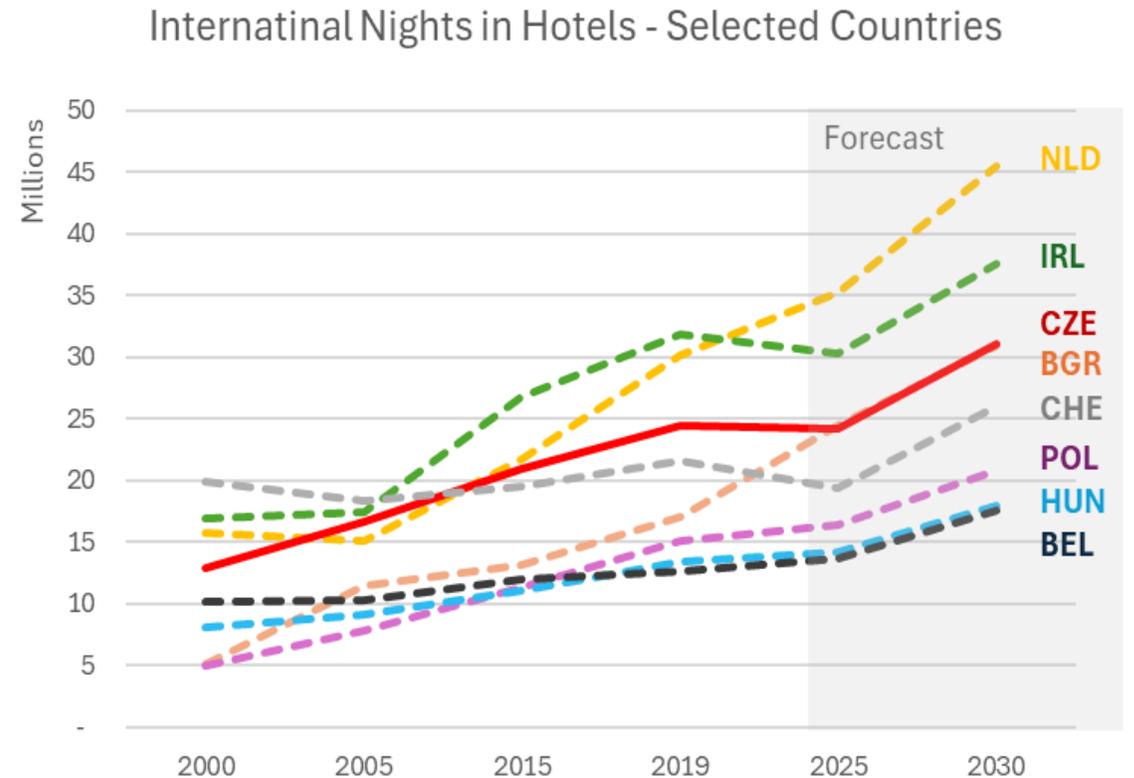
Good progress but still room to grow...

The Czech Republic is in 13th place



Source: Oxford Economics

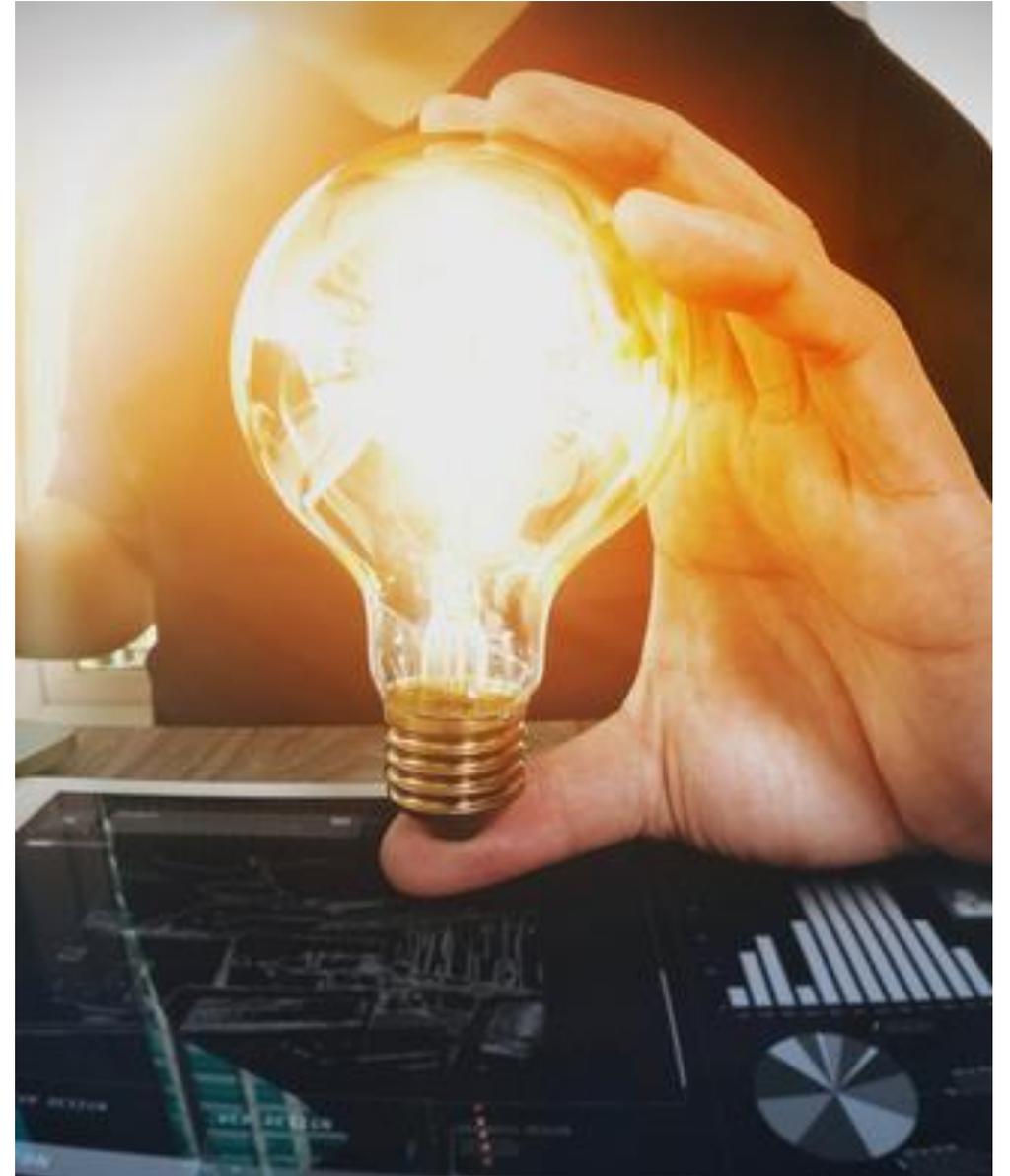
Moving up, but competition is growing too....



Source: Oxford Economics

KEY POINTS

- Tourism is expected to accelerate in the future
- The Czech Republic and Prague have great potential for growth
- Need to follow the changing preferences of consumers to maximise the opportunity





BORIK VOKRINEK

Head of Strategic Advisory & Hospitality Research EMEA
borivoj.vokrinek@cushwake.com

ABOUT CUSHMAN & WAKEFIELD

Cushman & Wakefield (NYSE: CWK) is a leading global commercial real estate services firm for property owners and occupiers with approximately 52,000 employees in nearly 400 offices and 60 countries. In 2023, the firm reported revenue of \$9.5 billion across its core services of property, facilities and project management, leasing, capital markets, and valuation and other services. It also receives numerous industry and business accolades for its award-winning culture and commitment to Diversity, Equity and Inclusion (DEI), sustainability and more. For additional information, visit www.cushmanwakefield.com.

Better never settles