

Czech Republic

Tourism in the economy

Tourism's share of GDP in the Czech Republic has been increasing over the last two years from 2.7% in 2012 to 2.9 % in 2013. The number of people employed in tourism is 231 288 in total (2013). The sector's share of total employment has remained relatively stable at around 4.5 % over the past five years.

The total number of foreign visitor arrivals was 27.3 million in 2014 (based on the Tourism Satellite Account), approximately 39% of which were tourists (overnight visitors) and 61% same-day visitors (including those in transit). Some 8.1 million non-resident guests stayed in collective tourist accommodation establishments in 2014, up from 7.9 million in 2013 (+3.1%). The average annual growth in guest numbers at collective accommodation establishments was 1.9% over the past five years, despite the impact of the global economic crisis.

In 2014, international tourism receipts reached EUR 5 149 million (-2%), with travel's share of total export revenues amounting to 4.0%. International travel expenditure was EUR 3 876 million (+11.8%), resulting in a positive balance on the travel and tourism account of EUR 1 273 million (-28.9%) in 2014.

Tourism governance and funding

The Ministry of Regional Development is responsible for co-ordinating and setting guidelines in the field of tourism. The Tourism Department carries out activities related to the development and implementation of tourism policy, implements measures arising from tourism related strategies, and undertakes activities to enhance awareness and recognition of tourism as an important industry of the national economy and to strengthen international co-operation. The Ministry is also responsible for preparing relevant legislation, as well as monitoring and collecting statistical information, developing tourism in the regions and supporting improvement in the quality and structure of tourism services. The National Collegium of Tourism is a consultative and advisory body for the Ministry.

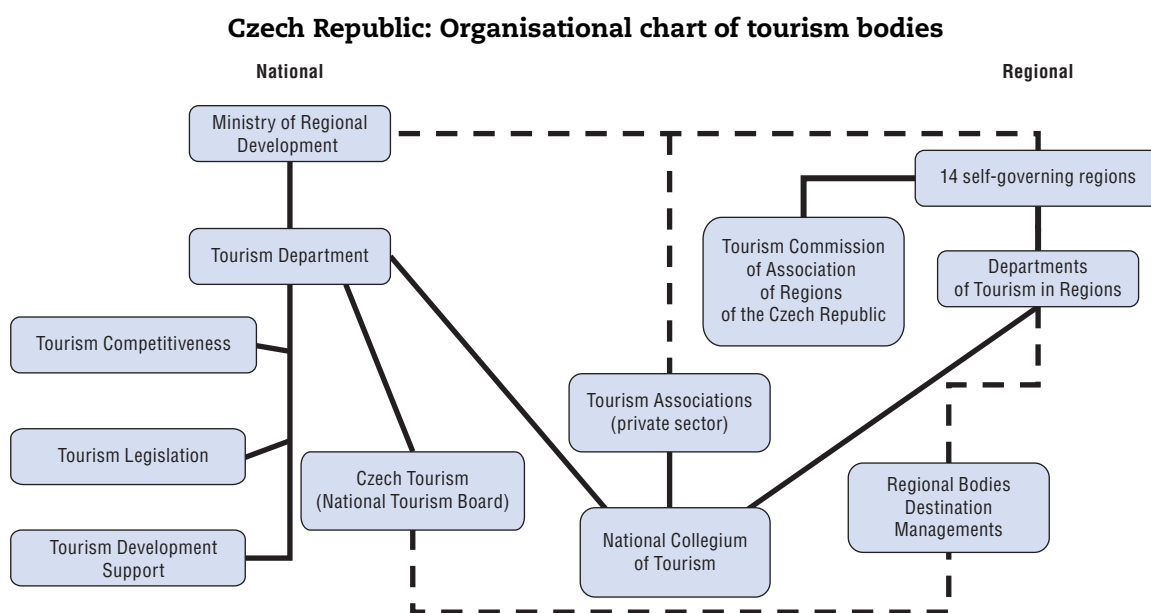
The Czech National Tourism Board, CzechTourism, is a grant-aided organisation supported by the Ministry of Regional Development. Its principal mission is to generate awareness of the Czech Republic as a tourism destination. Its main partners are the regional tourism organisations, municipalities and business enterprises. CzechTourism's objective is to promote tourism in co-operation with the private sector, and to review the medium-term strategy for the marketing of tourism products in the domestic and international markets.

The organisation of tourism in the Czech Republic is strongly influenced by the existence and respective administrative systems of the 14 self-governing regions in the country. Regions and individual communities are represented by different public institutions.

Co-operation between national and regional tourism organisations over the marketing strategy includes both tourism stakeholders and residents. The Ministry is responsible for negotiation with and feedback from the regions regarding marketing activities and product development. An officer has been appointed in every region to co-ordinate the marketing activities of CzechTourism and all public tourism bodies in the region. In addition, there are ad hoc working groups are set up when required.

Over the period 2007-13, there was an allocation of public funds amounting to almost CZK 55 billion. CzechTourism’s budget in 2014 was EUR 29.3 million which has been reduced by 14.5% year on year.

The main source of funding over the 2007-13 period was from European Union Structural Funds and relevant projects are now finishing. Bids are being finalised for the new programme period 2014-20 although the level of support for tourism is not anticipated to be at the same level. If the limitations around tourism infrastructure, marketing activities, statistics and market research are to be addressed, the state budget will have to be increased.



Source: OECD, adapted from the Ministry of Regional Development, 2016.

Tourism policies and programmes

The National Tourism Policy 2014-20, which was approved in 2013 by the Government, embraces the Marketing Strategy 2013-20. The strapline is *Destination Czech Republic – number one in the heart of Europe* with a global objective to increase the competitiveness of the tourism sector at the national and regional levels and maintain its economic performance as a result of achieving a balance between economic, socio-cultural, environmental and regional development.

Specific aims/priorities of the policy are to: enhance the quality of the tourism infrastructure; cultivate the business environment; build a structure of institutions to effectively implement the tourism policy; improve the quality of human resource; improve the marketing and access of service providers to tourism markets; and strengthen the role of tourism in the economic and sectoral policies of the state.

The main measures for tackling the key high-priority challenges are:

- Service quality. The Ministry, in co-operation with different tourism stakeholders, is implementing a project co-financed by European Union Structural funds on service quality. The Czech Service Quality System is based on the *Service Qualität Deutschland* (Service Quality Germany). This is an innovative system of certification aimed primarily at SMEs active in tourism, encouraging them to improve the quality of their services.
- Enhancing tourism data. The Ministry, in co-operation with the Czech Statistical Office, is implementing several projects on tourism statistics, aimed at improving and expanding statistical information on tourism. These projects include surveys of inbound tourism (TSA demand-side), accommodation establishments, tour operators and travel agencies, the Meetings, Incentives, Conferences and Exhibition (MICE) sector (TSA supply-side) and, finally, a survey of food and beverage establishments. The surveys will provide comprehensive information about the main tourism sectors that will, among other things, be valuable for the compilation of the TSA.
- The National Support Programme for Tourism 2010-15. Grants under this programme cover a maximum of 50% of project funding with the balance coming from the applicant's own resources. A sub-programme Tourism for All was announced in 2010 which also includes the development of new products aimed at reducing the seasonality of tourism, and the creation of jobs throughout the year. It focuses on creating new products for the domestic tourism sector including marketing support. In 2011, this programme was amended with new targets such as building rest places, sanitary facilities for tourists, cyclists and disabled travellers, access to tourist attractions, and improvements to navigation and information systems for hearing and visually impaired tourists. In 2014, more than CZK 50 million was allocated from the state budget for 34 projects.

Regular monitoring reports will include key indicators such as the number of nights spent by domestic and foreign visitors in collective accommodation establishments, occupancy rates, the number of people employed in tourism, the gross domestic tourism product, domestic and inbound tourism consumption, foreign exchange earnings from tourism and the share of foreign exchange earnings derived from tourism.

Statistical profile

Table 1. Czech Republic: Domestic, inbound and outbound tourism

	2010	2011	2012	2013	2014
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	93 924	86 236	76 328	75 353 p	76 824 e
Overnight visitors (tourists)	27 614	29 853	29 220	29 215 p	30 983 e
Same-day visitors (excursionists)	66 310	56 383	47 109	46 138 p	45 841 e
Nights in all types of accommodation	18 543	18 810	21 484 |	21 163	20 837
Hotels and similar establishments	9 478	9 853	11 910 |	11 825	11 716
Specialised establishments	..	..	..	..	..
Other collective establishments	9 065	8 957	9 575 |	9 339	9 121
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	21 941	22 810	25 750	26 332 p	27 329 e
Overnight visitors (tourists)	8 629	9 019	10 123	10 300 p	10 709 e
Same-day visitors (excursionists)	13 312	13 792	15 627	16 032 p	16 621 e
Top markets					
Germany	1 348	1 387	1 521 |	1 484	1 553
Russian Federation	415	559	732 |	803	691
Slovak Republic	307	344	436 |	452	493
Poland	351	371	402 |	424	449
United States	313	315	391 |	413	441
Nights in all types of accommodation	18 366	19 425	21 794 |	22 145	22 110
Hotels and similar establishments	16 881	18 027	19 936 |	20 072	19 971
Specialised establishments	..	..	..	..	..
Other collective establishments	1 485	1 398	1 858 |	2 073	2 139
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	11 890	10 893	10 990	10 305 p	10 576 e
Overnight visitors (tourists)	8 673	7 919	7 936	7 620 p	7 447 e
Same-day visitors (excursionists)	3 218	2 974	3 054	2 685 p	3 129 e
Top destinations					
Slovak Republic	..	944	1 025	949 p	941 e
Croatia	..	793	806	797 p	785 e
Austria	..	500	478	577 p	570 e
Italy	..	563	549	526 p	553 e
Greece	..	318	314	339 p	291 e
TOURISM RECEIPTS AND EXPENDITURE, MILLION CZK					
Inbound tourism					
Total international receipts	154 773	158 790	160 790	..	..
International travel receipts	136 933	143 319	145 958	137 829	141 783
International passenger transport receipts	17 840	15 471	14 832	..	..
Outbound tourism					
Total international expenditure	83 435	86 217	89 546	..	..
International travel expenditure	81 169	84 382	87 581	90 757	106 722
International passenger transport expenditure	2 266	1 835	1 965

.. Not available; | Break in series; e Estimated value; p Provisional data

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Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933319808>

Table 2. **Czech Republic: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed				
	2013	2010	2011	2012	2013	2014
Total	..	235 569	232 463	229 551 p	231 288 p	..
Tourism industries	..	232 326	229 214	226 288 p	228 009 p	..
Accommodation services for visitors	60 380	..	..	..	..	..
Hotels and similar establishments	..	38 239	41 861	39 875 p	39 624 p	..
Food and beverage serving industry	..	71 121	69 656	69 798 p	70 404 p	..
Passenger transport
Air passenger transport	..	4 703	3 177	2 535 p	2 503 p	..
Railways passenger transport	..	14 184	13 679	13 345 p	13 407 p	..
Road passenger transport	..	12 359	11 860	11 577 p	11 624 p	..
Water passenger transport	..	61	56	53 p	52 p	..
Passenger transport supporting services	..	2 599	2 868	3 209 p	3 306 p	..
Transport equipment rental	..	131	117	118 p	116 p	..
Travel agencies and other reservation services industry	..	14 875	12 052	12 161 p	12 898 p	..
Cultural industry	..	11 178	10 583	11 040 p	11 261 p	..
Sports and recreation industry	..	2 601	2 433	2 533 p	2 594 p	..
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries	..	60 274	60 872	60 045 p	60 220 p	..
Other industries	..	3 242	3 250	3 262 p	3 279 p	..

.. Not available; p Provisional data
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Source: OECD Tourism Statistics (Database).

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Table 3. **Czech Republic: Internal tourism consumption**

Million CZK

	2013		
	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
Total	..	..	..
Consumption products	93 998	140 241	234 239
Tourism characteristic products	64 762	85 589	150 351
Accommodation services for visitors	17 174	26 288	43 462
Food and beverage serving services	18 825	25 653	44 479
Passenger transport services	11 867	24 880	36 747
Air passenger transport services	6 981	22 108	29 088
Railways passenger transport services	798	795	1 593
Road passenger transport services	3 989	1 977	5 966
Water passenger transport services	100	..	100
Passenger transport supporting services	2 892	3 858	6 750
Transport equipment rental services	199	322	521
Travel agencies and other reservation services industry	5 641	680	6 321
Cultural services	5 102	2 880	7 982
Sports and recreation services	2 296	1 027	3 323
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	765	..	765
Other consumption products	29 236	54 652	83 888
Tourism connected products	29 236	54 652	83 888
Non-tourism related consumption products
Non-consumption products

.. Not available
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Source: OECD Tourism Statistics (Database).

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