

# Czech Republic

## Tourism in the economy

The Czech Republic has seen relatively stable but incremental tourism growth in recent years. Tourism accounted for 2.9% of GDP in 2017, while the number of people employed in tourism totalled 238 800, or 4.5% of total employment. Travel exports accounted for 24.5% of total service exports in 2018.

The country welcomed an estimated 36.3 million international visitors in 2018, based on the Tourism Satellite Account. Of these, approximately 39.4% were overnight visitors and 60.6% same-day visitors. Some 10.6 million international tourists stayed in tourism-related accommodation in 2018, up from 10.2 million in 2017 (an increase of 4.4%).

International tourism receipts totalled EUR 6.3 billion in 2018 (up 1.6 % on 2017), while expenditure by Czech residents on outbound trips reached EUR 5.0 billion (up 3.7%), resulting in a positive balance of payments on the travel and tourism account of EUR 1.3 billion.

Residents took a total of 82.6 million domestic trips in 2018, of which 36.9% were tourism trips including an overnight stay. Domestic tourists declined 6.4% in 2018 compared to 2017, after experiencing growth of 6.1% between 2016 and 2017.

## Tourism governance and funding

The Ministry of Regional Development is responsible for co-ordinating and setting guidelines in the field of tourism. Within the Ministry, the Tourism Department develops and implements tourism policy, and tourism-related strategies. It undertakes activities to enhance recognition of tourism as an important sector of the national economy and strengthen international co-operation. The Ministry is also responsible for preparing relevant legislation, as well as monitoring and collecting tourism statistics, developing tourism in the regions, and supporting the quality and structure of tourism services.

The Czech National Tourist Board, CzechTourism, is charged with promoting the destination in co-operation with the private sector, and delivering the marketing strategy for tourism products in both domestic and international markets. It is a grant-aided organisation supported by the Ministry whose main partners are regional tourism organisations, municipalities and the private sector.

The organisation of tourism is strongly influenced by the respective administrative systems of the 14 self-governing regions in the country. Co-operation between national and regional tourism organisations is defined by the marketing strategy of CzechTourism and follows a Balanced Scorecard approach, taking into account the perspectives of both stakeholders and residents. The Ministry oversees the negotiation, communication and feedback from the regions on both marketing activities and product development. In each region, a co-ordinator is appointed to harmonise marketing activities of the region's tourism organisations, working closely with CzechTourism.

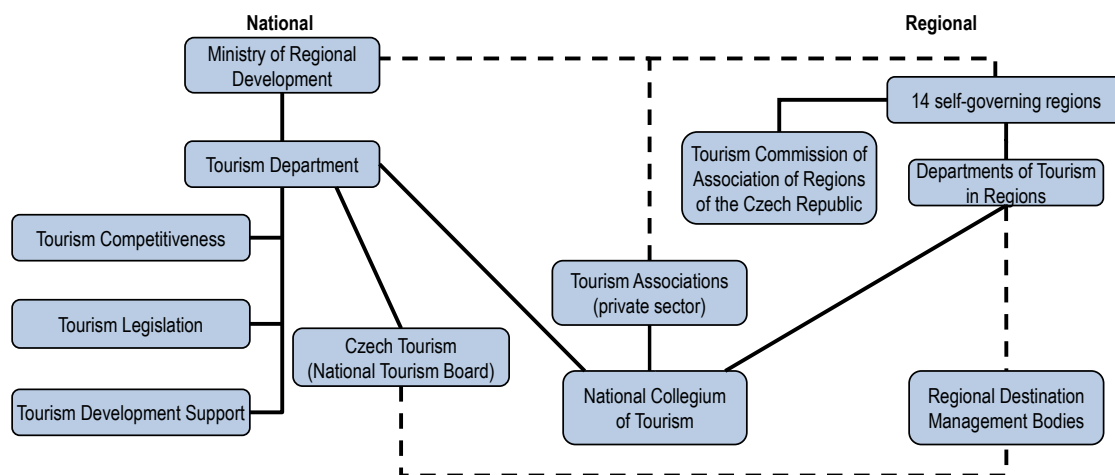
The National Collegium of Tourism is the consultative and advisory body of the Ministry. It facilitates co-operation between state departments and agencies, professional associations, the academic sector,

unions and other stakeholders. Ad-hoc working groups are established to support the development of tourism policies and programmes.

The budget of the Tourism Department was EUR 9.1 million in 2018, a reduction of 11.3 % year-on-year. Czech Tourism's budget in 2018 was EUR 19.4 million, an increase of 14.8 % against 2017. In addition, EUR 9.7 million was allocated in 2018 to fund the National Support Programme for Tourism in Regions 2017-20.

The budget for tourism has generally been under pressure since 2014, linked with a reduction in EU funding under the operational programme for tourism over the period 2014-20. This has affected investment in tourism infrastructure, marketing activities, statistics and market research.

### Czech Republic: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Regional Development, 2020.

### Tourism policies and programmes

The overall objective of the National Tourism Policy 2014-20 is to increase the competitiveness of the tourism sector at national and regional levels, maintain its economic performance while also achieving a balance between economic, socio-cultural and environmental considerations.

Specific aims of the policy include:

- Building sound institutional structures to effectively implement policy.
- Enhancing the quality of tourism supply, including measures to assist the business environment.
- Improving workforce skills.
- Improving access to tourism markets by service providers.
- Strengthening the role of tourism in other economic and sectoral policies.

Linked with this, the marketing strategy 2013-20 seeks to expand national product themes and better reflect the potential of regions, including through the promotion of regional products, gastronomy, eco- and agro-tourism, and wellness tourism. A new tourism strategy for the period 2021-30 is currently being prepared.

Current high-priority challenges include raising service quality, improving statistical data and developing a programme to support regional tourism development. Actions to address these challenges include:

**Continued implementation of the Czech Service Quality System.** This innovative system of certification is primarily aimed at tourism SMEs, to support businesses to improve the quality of their services and gain further expertise. It is undertaken by the Ministry, in co-operation with CzechTourism and different tourism stakeholders.

**Implementation of a project on tourism statistics,** aimed at improving and expanding statistical data concerning inbound tourism to the Czech Republic. This project includes an inbound tourism survey using mobile derived big data and consists of analysing residual data of mobile operators and thus improving data collection relating to the Czech Republic's Tourism Satellite Account. It is undertaken by the Ministry in co-operation with the Czech Statistical Office, with results expected in early 2020.

**Implementation of the National Support Programme for Tourism in Regions 2017-20,** and its sub-programmes: development of basic and supporting tourism facilities, and marketing activities in tourism.

- Tourism infrastructure sub-programme has supported a wide variety of small scale projects. These are often of a public nature contributing to making destinations more attractive and improving the quality of tourism products and services in the region. Projects include navigation and information systems relating to tourist attractions, tourist rest areas, public toilets, and infrastructure along hiking trails. Projects that complement and widen the overall offer and improve the attractiveness of destinations are prioritised, with success assessed using a broad set of measures reflecting the small scale of the projects financed and difficulties in evaluating the impact on a purely financial or usage measures, especially for public realm projects developing the supporting infrastructure.
- Marketing activities sub-programme is targeted at destination management organisations, and has brought benefits relating to increased awareness among both domestic and international visitors, enabling marketing of the wider offer, as well as promoting specific tourism products in core destinations.

Co-financing grants for tourism facilities and marketing activities under this programme support the development of regional tourism businesses, with a maximum of 50% of project costs supported with the applicant providing the balance. A wide range of grant recipients are eligible, including regional authorities, municipalities, businesses and not-for-profit organisations, while the sub-programme to support marketing activities is targeted towards destination management organisations.

## Statistical Profile

## Czech Republic: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism<sup>1</sup></b>					
Total domestic trips	76 059	77 817	85 375	90 164 p	82 611 e
Overnight visitors (tourists)	29 412	28 325	30 691	32 562 p	30 476 e
Same-day visitors (excursionists)	46 646	49 492	54 684	57 603 p	52 135 e
Nights in all types of accommodation	20 837	23 807	25 429	26 962	28 754
Hotels and similar establishments	11 716	13 290	14 624	15 897	16 974
Other collective establishments	9 121	10 517	10 805	11 066	11 780
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	27 166	29 604	32 519	34 701 p	36 268 e
Overnight visitors (tourists)	10 649	11 619	12 808	13 665 p	14 283 e
Same-day visitors (excursionists)	16 518	17 985	19 711	21 036 p	21 986 e
Top markets					
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
..	..	..	..	..	..
Nights in all types of accommodation	35 132	38 341	42 322	44 893 p	46 077 e
Hotels and similar establishments	21 124	22 185	22 694	24 136 p	24 427 e
Other collective establishments	2 460	2 664	2 639	2 692 p	2 931 e
Private accommodation	11 548	13 492	16 989	18 064 p	18 720 e
<b>Outbound tourism</b>					
Total international departures	10 141	10 383	10 827 p	11 431 p	12 380 e
Overnight visitors (tourists)	7 393	7 654	7 923 p	8 893 p	9 700 e
Same-day visitors (excursionists)	2 748	2 729	2 904 p	2 538 p	2 680 e
Top destinations					
Slovak Republic	941	1 386	1 151	1 271 p	1 504 e
Croatia	785	721	828	850 p	813 e
Austria	570	492	589	657 p	676 e
Italy	553	497	552	636 p	607 e
Greece	291	253	265	371 p	472 e
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION CZK</b>					
<b>Inbound tourism</b>					
Total international receipts	158 164	166 448	172 047	178 956	180 150
International travel receipts	141 783	148 995	154 183	162 071	161 907
International passenger transport receipts	16 381	17 453	17 864	16 886	18 243
<b>Outbound tourism</b>					
Total international expenditure	107 567	118 530	121 261	128 782	131 879
International travel expenditure	106 721	117 382	120 220	127 210	129 653
International passenger transport expenditure	845	1 148	1 041	1 572	2 226

.. Not available; e Estimated value; p Provisional data

1. Trips from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076533>

## Czech Republic: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
		2017	2014	2015	2016	2017
<b>Total</b>	..	<b>225 006</b>	<b>229 197</b>	<b>233 299 p</b>	<b>238 843 p</b>	..
<b>Tourism industries</b>	..	<b>221 691</b>	<b>225 831</b>	<b>229 882 p</b>	<b>235 375 p</b>	..
Accommodation services for visitors	9 307	..	..	..	..	..
Hotels and similar establishments	..	39 042	40 998	41 932 p	42 239 p	..
Food and beverage serving industry	48 778	65 658	66 266	67 936 p	71 256 p	..
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	2 334	2 122	2 163 p	2 295 p	..
Railways passenger transport	..	13 192	13 146	12 899 p	12 616 p	..
Road passenger transport	..	11 627	11 940	12 081 p	12 229 p	..
Water passenger transport	..	50	52	49 p	48 p	..
Passenger transport supporting services	..	3 403	3 643	3 793 p	3 997 p	..
Transport equipment rental	..	117	122	134 p	135 p	..
Travel agencies and other reservation services industry	..	12 341	12 885	12 966 p	13 742 p	..
Cultural industry	..	11 381	11 759	12 060 p	12 525 p	..
Sports and recreation industry	..	2 579	2 682	2 746 p	2 871 p	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	59 968	60 215	61 123 p	61 421 p	..
<b>Other industries</b>	..	<b>3 315</b>	<b>3 366</b>	<b>3 417 p</b>	<b>3 468 p</b>	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076552>

## Czech Republic: Internal tourism consumption

Million CZK

	2017		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>120 411 p</b>	<b>164 899 p</b>	<b>292 456 p</b>
Tourism characteristic products	78 222 p	110 456 p	195 824 p
Accommodation services for visitors	16 201 p	31 901 p	55 249 p
Food and beverage serving services	24 595 p	32 908 p	57 502 p
Passenger transport services	15 477 p	33 653 p	49 131 p
Air passenger transport services	9 104 p	29 509 p	38 613 p
Railways passenger transport services	1 040 p	1 171 p	2 211 p
Road passenger transport services	5 202 p	2 973 p	8 176 p
Water passenger transport services	130 p	.. p	130 p
Passenger transport supporting services	3 772 p	4 611 p	8 383 p
Transport equipment rental services	260 p	473 p	734 p
Travel agencies and other reservation services industry	6 967 p	967 p	7 934 p
Cultural services	6 844 p	4 426 p	11 270 p
Sports and recreation services	3 080 p	1 516 p	4 596 p
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	1 027 p	..	1 027 p
Other consumption products	42 189 p	54 443 p	96 631 p
Tourism connected products	42 189 p	54 443 p	96 631 p
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076571>



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