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*European Tourism Statistics:*

*A Forward Looking and Innovative Response to 21<sup>st</sup> Century User Needs*

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## Abstract title

The Story of the Regional Tourism Satellite Account: How do other Czech regions compete with Prague?

## Subject area

- Session 1: Choosing the right tourism package (users' perspective and information needs...)
- Session 2: Cooking class – exploring new ingredients and recipes (innovative practices)
- Session 3a: Excursions to exotic locations – a. Measuring the economic importance of tourism / TSA
- Session 3b: Excursions to exotic locations – b. Measuring the sustainability of tourism
- Session 4: Our next trip ... where do tourism statistics want to travel, how and when? (future orientations)

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## Executive summary

The article presents the TSA of the Czech Republic, which can be considered not only as fully-fledged and internationally comparable, but also as innovative and advanced in many respects. First, the basic methodological concept is presented along with the data sources. The article then provides brief information on the method and form of publishing the results, as well as the latest data on the main macroeconomic indicators of tourism in the Czech Republic.

Special attention is paid to the assessment of the economic performance of tourism compared to other sectors and the regional dimension of TSA data (implementation of gross value added from tourism and employment in NUTS 2/NUTS 3 regions). In particular, the regional adaptation of the TSA system satisfies the growing political and user demand for tourism data at the subnational level.

## Abstract

### **1. Introduction: objective, key focus, problem statement**

The Tourism Satellite Account (TSA) is an essential tool for understanding the economic impact of tourism. The level of its compilation in Europe varies among countries and is mainly related to the quality of input data parameters on the demand and supply sides. The TSA system in the Czech Republic can be considered not only full-fledged and internationally comparable, but also innovative and advanced in many ways. It provides critical insights into how tourism contributes to the national economy, making it easier to formulate strategies that enhance tourism development.

The document presents the basic methodological concept and data sources, along with information on dissemination of results and forms of communication towards users. It highlights the latest macroeconomic indicators of tourism in the Czech Republic and assesses tourism's economic performance compared to other sectors. To address the need for tourist data at a local level, particular emphasis is given to the Regional Tourism Satellite Account and experience of the Czech Republic in this area.

### **2. Approach and methodology**

#### **2.1 Methodology of TSA Compilation in the Czech Republic**

The Czech Statistical Office (CZSO) is responsible for compiling the TSA in the Czech Republic. The Czech TSA consists of 9 completed tables nowadays. Only "Table TSA 9 – Collective consumption" has not been implemented yet. Demand and supply side of the system is continuously calculated on an annual basis. In terms of methodology, compiling of the Czech TSA is fully in line with valid international documents and manuals, especially with the IRTS (International Recommendations for Tourism Statistics 2008), the TSA:RMF (Tourism Satellite Accounts Recommended Methodological Framework), ESA (European system of national and regional accounts) and EIM on TSA (European Implementation Manual on TSA).

The TSA only measures the direct impact of tourism assuming a direct relationship between the provider of the product or service and the consumer (the visitor in this case). The effects of indirect influence have not been quantified yet, as well as a broader concept of leisure activities (these activities are not monitored in the Czech Republic).

Most data is published (also due to its nature) at the national level. However, the Czech Republic has expanded the core system with two additional modules:

- Tourism Employment Module (TEM)
- TSA Regionalization (RTSA)

## 2.2 Main TSA data sources

Main data sources in the process of compilation of Czech TSA are following:

### *Demand side:*

- Inbound tourism survey – formerly border / now inland survey (Ministry of Regional Development + CzechTourism Agency)
- Survey at Collective Accommodation Establishments – business survey (CZSO)
- TSS (VŠCR) – Domestic and Outbound Tourism – household sample survey (CZSO)
- Balance of Payments – TBoP / verification (Czech National Bank)
- Ad-hoc studies, tourism surveys, census...

### *Supply side:*

- National Accounts – Supply and Use-tables (CZSO)
- Main economic aggregates: P.1, P.2, P.6, D.2, D.3, GFCF
- Employment – NA data + LFSS (CZSO)

## 2.3 Tables Overview

System of TSA tables in the Czech Republic for publication is as follows:

Overview – TSA tables	Overview – TEM tables
<p><b>Tourism demand</b></p> <ul style="list-style-type: none"> <li>▪ 7 tables (TSA T1.1 – T4.2)</li> </ul> <p><b>Tourism supply</b></p> <ul style="list-style-type: none"> <li>▪ 3 tables (TSA T5.1 – T6.2)</li> </ul> <p><b>Employment</b></p> <ul style="list-style-type: none"> <li>▪ 2 tables (TSA T7.1 – T7.2)</li> </ul> <p><b>Investment</b></p> <ul style="list-style-type: none"> <li>▪ 2 tables (TSA T8.1. – T8.2)</li> </ul> <p><b>Non-monetary indicators</b></p> <ul style="list-style-type: none"> <li>▪ 2 tables (TSA T10.1 – T10.2)</li> </ul> <p><b>Main indicators of the NE and tourism</b></p> <ul style="list-style-type: none"> <li>▪ 1 table (TSA T11.1.)</li> </ul>	<p><b>Number of jobs and people employed</b></p> <ul style="list-style-type: none"> <li>▪ 1 table (MZ T1)</li> </ul> <p><b>Socio-demographic characteristics</b></p> <ul style="list-style-type: none"> <li>▪ 7 tables (MZ T2 – T8)</li> </ul> <p style="font-size: small;">MZ T2 - Seasonality      MZ T3 - Working scheme  MZ T4 - Permanency of job      MZ T5 - Sex  MZ T6 - Age groups      MZ T7 - Level of education  MZ T8 - Nationality</p> <p><b>The link with the TSA - Employment output in tourism</b></p> <ul style="list-style-type: none"> <li>▪ 1 table (MZ T9)</li> </ul> <p><b>Aggregate indicators of employment in the national economy and tourism</b></p> <ul style="list-style-type: none"> <li>▪ 2 tables (MZ T10 – T11)</li> </ul>
<p><b>Regional TSA – 2 tables: TDGVA, Employment</b></p> <ul style="list-style-type: none"> <li>▪ Data by NUTS 2 (8 Cohesion Regions) and NUTS 3 (14 Regions)</li> </ul>	

## 2.4 Disseminations of results

The standard deadline for publication of the results is the end of February (T+14m). Since 2024, a faster estimate has been newly introduced for the table "Number of visitors by type of tourism" (non-monetary indicators, T+6m).

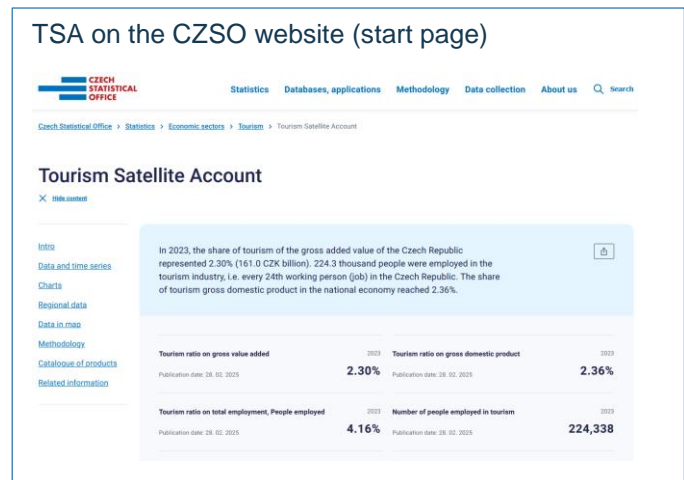
The results of the Czech TSA are accessible (easily and free of charge) on CZSO website. For reasons of methodological comparability, annual time series are published from the reference year 2003 (regional data from 2010). The latest data is for 2023.

[Tourism Satellite Account | Statistics](#)

[Tourism Satellite Account | Tables](#)

Most commonly used forms of communication:

- Time series of data
- Statistical Yearbook
- Press Releases, Conferences
- Professional journals
- External presentation
- Infographics



## 3. Results and practical applications

### 3.1 Main economic indicators of tourism

In the Czech Republic, tourism is an important economic activity at both the national and regional level. After the coronavirus pandemic, when it was one of the most affected sectors, it is gradually recovering. The gross value added of tourism reached CZK 161.0 billion in 2023, and nominally increased by 18.7% year-on-year. This is the highest value of the indicator in the time series since the beginning of monitoring in 2003. Compared to the last pre-covid year of 2019, the gross added value in tourism was 11.2% higher in 2023.

The relative share of tourism in GVA and GDP in the Czech Republic represented 2.30% and 2.36% respectively. However, these are still lower shares compared to the pre-pandemic period. These key indicators of tourism's position in the economy in 2019 accounted for 2.76% of GVA and 2.87% of GDP. In this regard, tourism is currently catching up with the development of the overall economy at a slower pace.

The total volume of internal tourism consumption in 2023 reached CZK 328.9 billion. This is an aggregated indicator of the demand of all visitors whose travel expenses ended up in the Czech Republic, i.e. clients from abroad and domestic guests. In 2023, their combined consumption was 15.1% higher year-on-year and reached its highest value since 2003. The 2019 level of this indicator was exceeded by CZK 20.6 billion (+6.7%).

Inbound tourism, represented by foreign visitors, amounted to more than 56% of internal tourism expenditure in 2023 (CZK 185.8 billion). The remaining 44% (CZK 143.1 billion) were generated by domestic visitors through domestic tourism.

### 3.2 Regional TSA and results / Czech case

Regional Tourism Satellite Account (RTSA) provides basic information on the economic importance of tourism also in regions of the Czech Republic. It represents the regional specification (breakdown) of TSA at the national level. The main data sources used in the process of TSA regionalization are Regional Accounts from the National Accounts Department and Business Statistics (regional section). A "top-down" method is used for the compilation. The results are broken down into NUTS 2 level - cohesion regions and NUTS 3 - regions. Data on gross value added of tourism and the number of persons employed are provided (on an annual basis).

After the coronavirus pandemic, the tourism economy is gradually recovering in all regions of the Czech Republic. In 2023, Prague contributed most to the creation of economic indicators – 26.1% of employment (58.5 thousand people and 35.7% (CZK 57.4 billion) of the total gross value added in the sector. Jihomoravský Region and Středočeský Region followed closely behind in both indicators. At the same time, Prague's dominance over the other Czech regions is gradually strengthening again. Foreign clientele is returning to the capital, often using accommodation services in higher category establishments.

The importance of tourism for the economy at the regional level can also be expressed by the share of the total volume of gross value added for all sectors, directly in the given region. The highest values have long been shown by Karlovarský Region, where tourism generated 4.5% of regional gross value added in 2023 (5.2 CZK billion). However, in 2019 it was 5.4% Prague reached a share of 3.0%.

In Karlovarský Region, 10.8 thousand people were directly employed in tourism, which represented a share of 8.3% of employment in the region. Roughly, one in twelve workers (jobs) was in tourism. The higher volume of human labour in this region is typically and predominantly related to spa and wellness services. In Prague, the share of tourism was 5.9%, i.e. almost every seventeenth worker was associated with tourism. The share of tourism in total employment in the national economy in 2023 reached 4.16%.

## 4. Conclusions and implications

The compilation of the TSA in the Czech Republic is vital for understanding the economic implications of tourism. In the face of recent challenges, such as the covid-19 pandemic, the TSA results can help shape recovery strategies and ensure the long-term sustainability of tourism. In general, the compilation of TSA as part of the ESS involves a systematic conceptual approach guided by international standards, particularly those established by the UN Tourism and Eurostat. Mutual cooperation, awareness and comparison of data within countries is a necessary prerequisite for the further development and improvement of tourism statistics and the TSA system in Europe.

## 5. References or relevant links

[TSA in the Czech Republic - CZSO website \(start page\)](#)

[Tourism Satellite Accounts on Europe - Experimental statistics](#)

[Tourism Satellite Accounts in Europe – 2023 Edition](#)