

TOURISM SATELLITE ACCOUNT

OF THE SLOVAK REPUBLIC

The Statistical Office of the Slovak Republic provides information on tourism for the reference year 2017. The tables of Tourism Satellite Account contain a comprehensive view of the development of tourism economic indicators and their impact on the country's economy.

How has tourism contributed to the creation of gross domestic product (GDP) or the gross value added (GVA)? How many people were employed in tourism? How much money did visitors spend on domestic or outbound trips? All these information can be found at the following pages and many other in the TSA tables which are available upon request.

Data for the Tourism Satellite Account of the Slovak Republic (TSA SR) are processed for the reference period 2013 – 2017. The data on the demand side and supply side, for the years 2013 - 2016 have been revised on the basis of the refined methodology of international standards and initiatives for TSA obtained from international organizations – the OECD and Eurostat. The classification of tourism products and the tourism industries has been revised. The overall data on the demand side of the TSA were revised using longer time series of data available from the surveys on inbound tourism, domestic and outbound tourism, as well as the individual structures of the TSA expenditure indicators.

Data for the Tourism Satellite Account of the SR are processed in the time series 2013-2017 in the following analytical tables:

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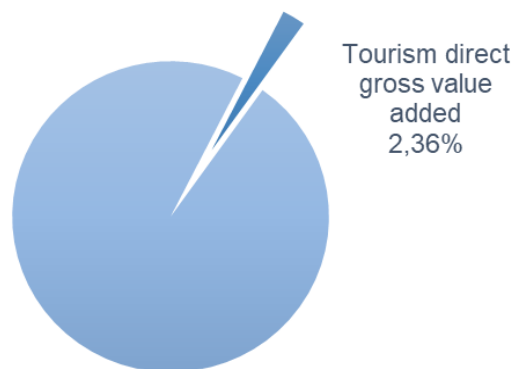
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TOURISM DIRECT GROSS VALUE ADDED IN THE SLOVAK REPUBLIC

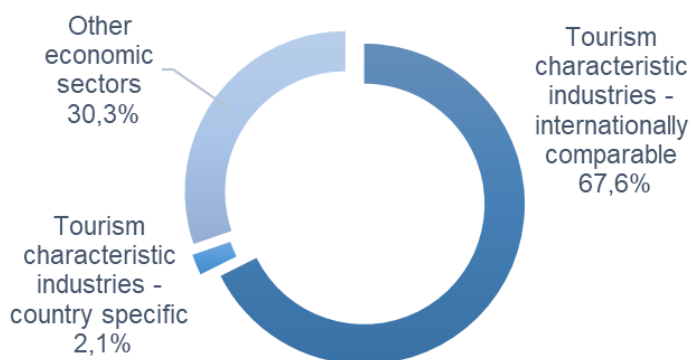
In the reference period, the tourism direct gross value added (TDGVA) amounted to EUR 1,78 bil. It contributed by 2,36 % to the total gross value added (GVA) of the economy.

The share of tourism direct gross value added in the gross value added of the economy in 2017

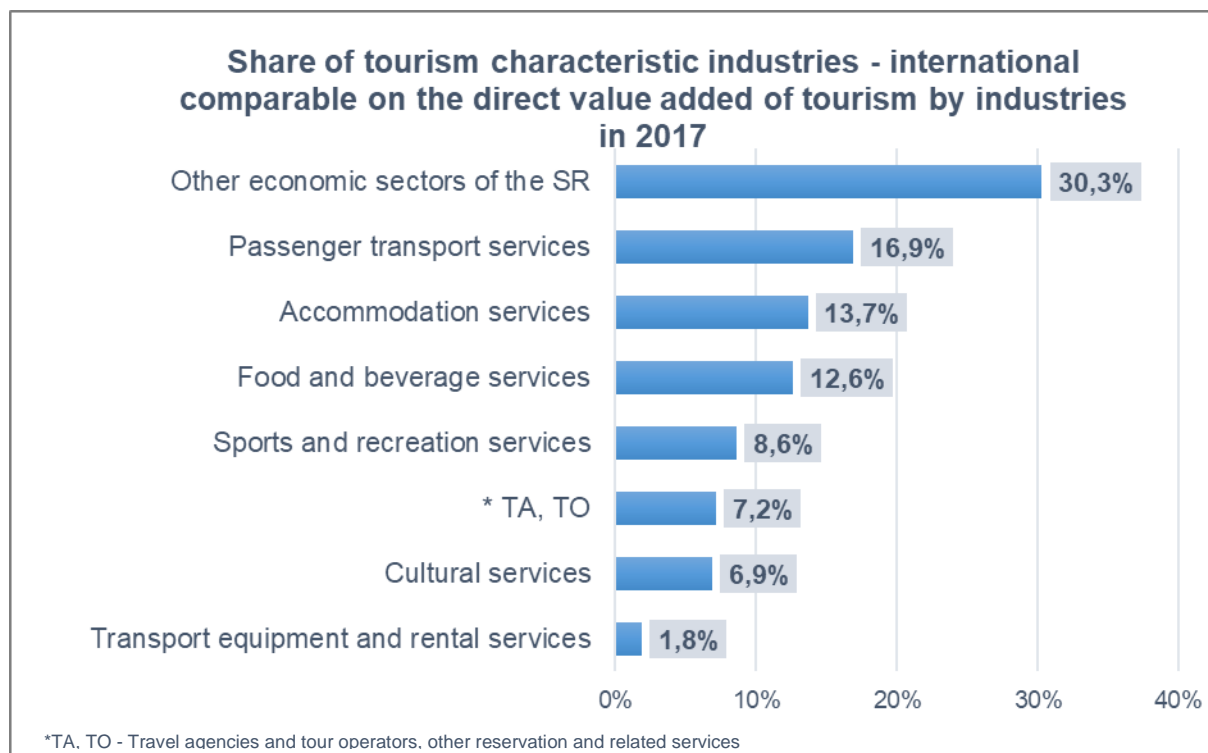


The tourism direct gross value added was attributed to the tourism characteristic industries – internationally comparable of 67,6 %, tourism characteristic industries – country specific of 2,1 % and 30,3 % was made up of other economic sectors.

The share of industries in tourism direct gross value added in 2017



In tourism characteristic industries – internationally comparable, the passenger transport services (16,9 %), accommodation services (13,7 %), food and beverage services (12,6 %) and sports and recreation services (8,6 %) contributed the most to the creation of tourism direct gross value added, followed by cultural services (6,9 %), travel agencies and other reservation services (7,2 %), transport equipment and rental services (1,8 %).



TOURISM DIRECT GROSS DOMESTIC PRODUCT

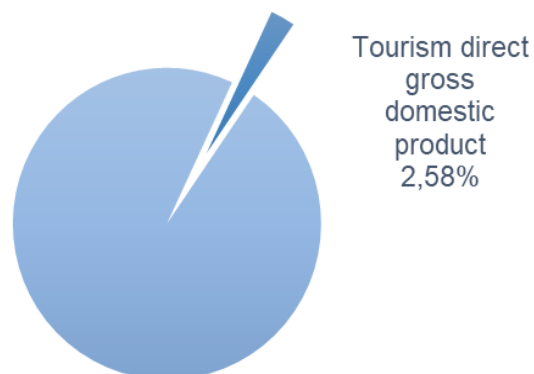
The tourism direct gross domestic product is part of the gross domestic product of economy. It is calculated as a sum of tourism direct gross value added and net taxes on tourism products (taxes on products less subsidies on products, which were included in the consumption of tourism products).



In 2017, the tourism direct gross domestic product reached EUR 2,16 bil. which represented a 2,58 % share on the GDP of the Slovak economy.

Net taxes on products accounted for 17,8 % and the direct value added of tourism 82,2 % of the tourism direct gross domestic product.

The share of tourism direct gross domestic product in the gross domestic product of economy in 2017

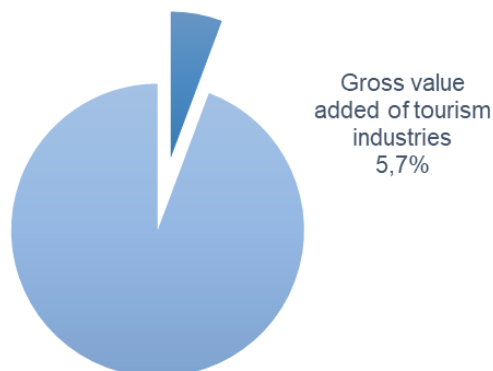


GROSS VALUE ADDED OF TOURISM INDUSTRIES IN THE SLOVAK REPUBLIC

The gross value added of tourism industries includes the gross value added for all its activities, whether or not they are part of the tourism industry and whether they directly serve visitors.

The tourism characteristic industries in the SR together with country specific tourism industries reached a gross value added of EUR 4,29 bil. during 2017. It represented 5,70 % share of the total value added of the Slovak economy.

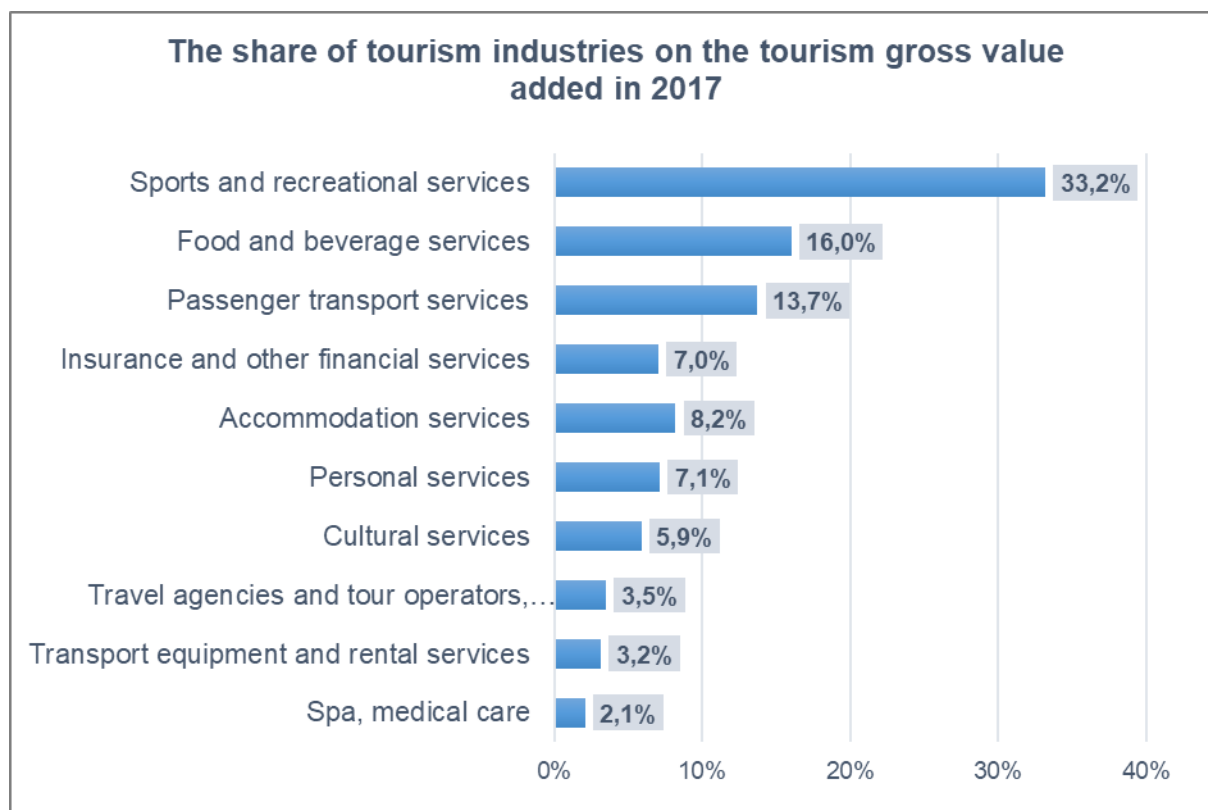
The share of gross value added of tourism industries on the gross value added of the Slovak economy in 2017



During the reference period, tourism characteristic industries – internationally comparable, generated gross value added in the amount of EUR 3,59 bil. which is a



83,7 % of the total value added of tourism industries. The tourism characteristic industries – country specific, contributed by EUR 0,70 bil. to the total value added which is by 16,3 % of the total value added of tourism industries.



In the tourism characteristic industries – internationally comparable, the sports and recreational services had the highest share on the gross value added of tourism industries, followed by food and beverage services and personal services.

Within tourism characteristic industries – country specific, the insurance and financial services and personal services accounted for the highest share on the gross value added of tourism industries.



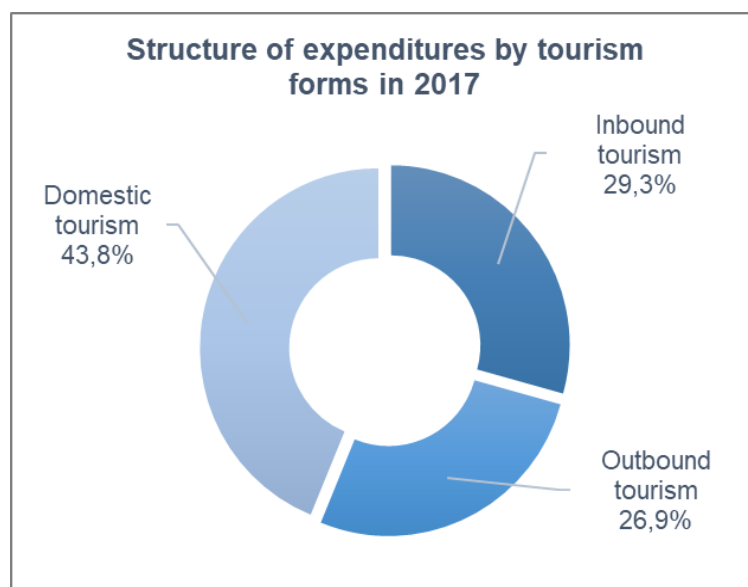
TOURISM EXPENDITURES

In 2017, visitors spent almost EUR 5,32 bil. in domestic, inbound and outbound tourism of the SR. Non-residents of the SR who were on the territory of the SR in their leisure time, on recreation or on a business trip for less than 1 year, spent in 2017, in the SR, EUR 1,56 bil. thus contributing to the inbound tourism expenditures by 29,3 %.

The Slovak residents incurred expenditure in the amount of EUR 2,33 bil. representing 43,8 % of expenditures on inbound tourism. The afore-mentioned expenditures include not only the expenditures of the SR residents on domestic trips but also a part of the visitors' expenditures on outbound tourism, occurring in relation to these foreign trips before their realization in the territory of the Slovak Republic.

Within the outbound tourism of the SR residents, i.e. foreign trips for leisure, recreation or business for a period less than 1 year, the SR residents spent money in the amount of EUR 1,43 bil.

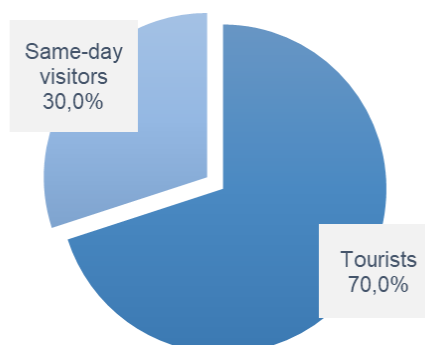
In terms of the overall structure of expenditures by the forms of tourism (domestic, inbound, outbound) the domestic tourism accounted for 43,8 % of total expenditure, followed by inbound tourism (29,3 %) and outbound tourism (26,9 %).





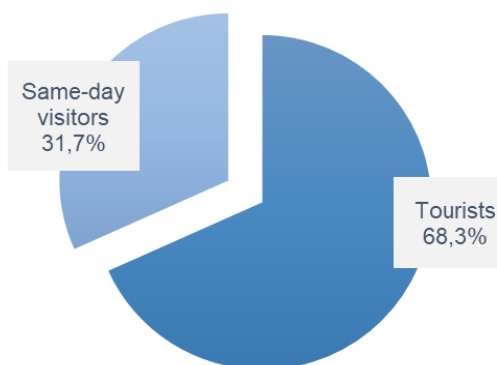
In inbound tourism, tourists (visitors with overnight stay) accounted for the vast majority of expenditures (70,0 %). Same-day visitors (visitors without overnight stay) accounted for 30,0 % of expenditures.

Inbound tourism expenditures by visitor categories in 2017



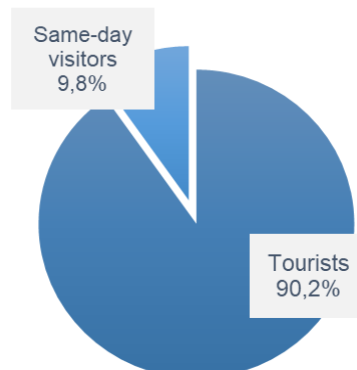
In domestic tourism similarly as in inbound tourism, the most significant part of expenditures concerned tourist expenditures (68,3 %). In the reference period, the expenditures of same-day visitors represented 31,7 % of the total expenditures of domestic tourism.

Domestic tourism expenditures by visitor categories in 2017



Similarly in outbound tourism, tourist expenditures accounted for the predominant part of total expenditures on inbound tourism, in the amount of 90,2 %. Same-day visitors represented 9,8 % of the total expenditures of outbound tourism.

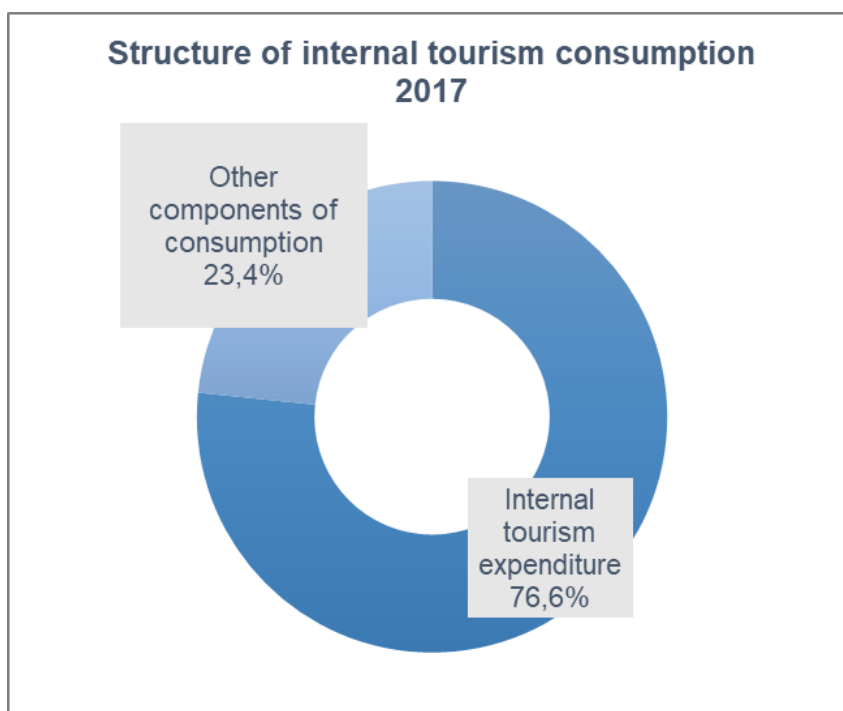
Outbound tourism expenditures by visitor categories in 2017





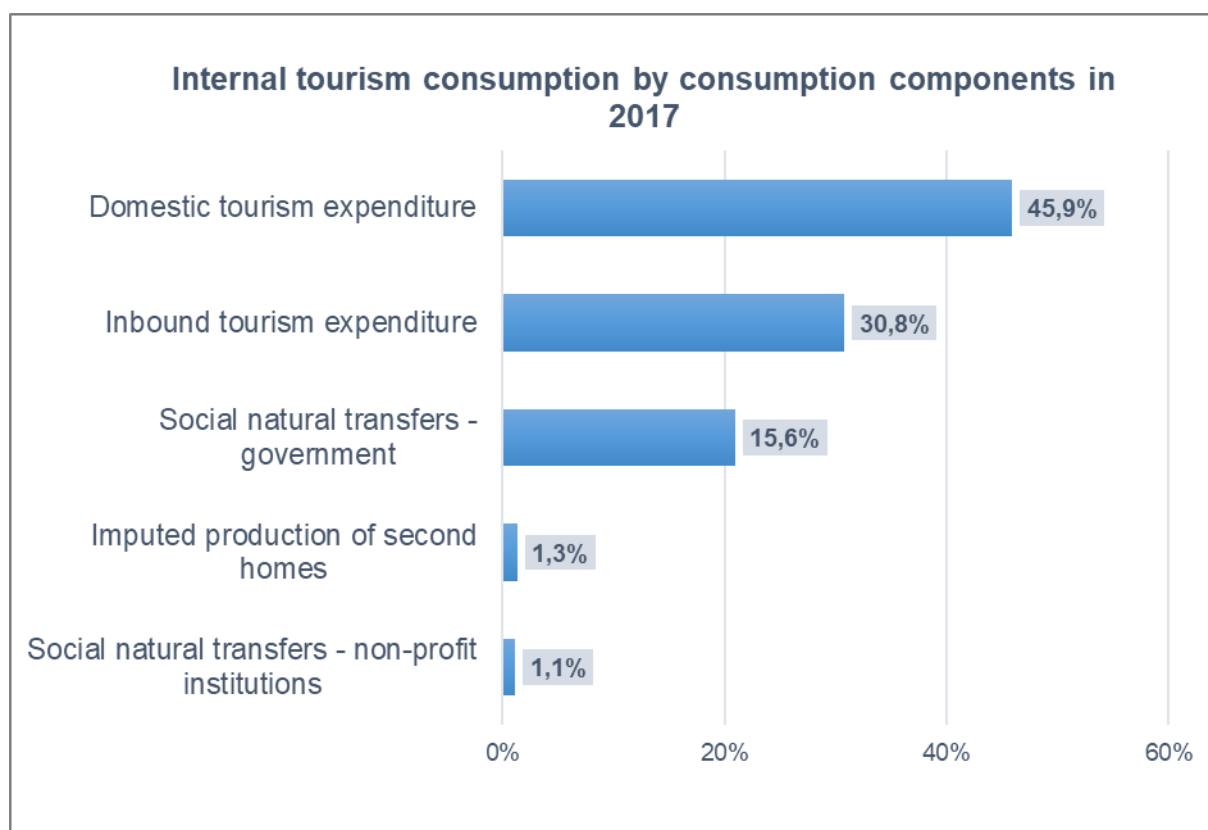
INTERNAL TOURISM CONSUMPTION

Internal tourism consumption is a broader concept than the tourism expenditure indicator. Inbound and outbound tourism expenditure data are entering the consumption which together make up the total expenditures on inbound tourism of the Slovak Republic. The



above-mentioned expenditures represent the cash payments of residents and non-residents in the territory of the SR. In addition to these cash payments, the consumption in the SR also includes non-cash payments of visitors which are referred to as other components of internal tourism consumption in the TSA methodology.

In the conditions of the SR, they include imputed production of second homes related to accommodation in holiday homes. Another item comprises social natural transfers in kind related to government and non-profit organizations serving households NPISHs (individual non-market services) provided to visitors free of charge or at economically insignificant prices, e.g. health, museum activities, recreational and sports activities.



EMPLOYMENT IN TOURISM INDUSTRIES

In 2017, tourism industries had almost 184 thousand occupied posts¹ of which 83,5 % were employees and 16,5 % self-employed (natural persons)². In tourism industries, there were 309 195 thousand hours worked, of which 80,5 % were of employees and 19,5 % of self-employed.

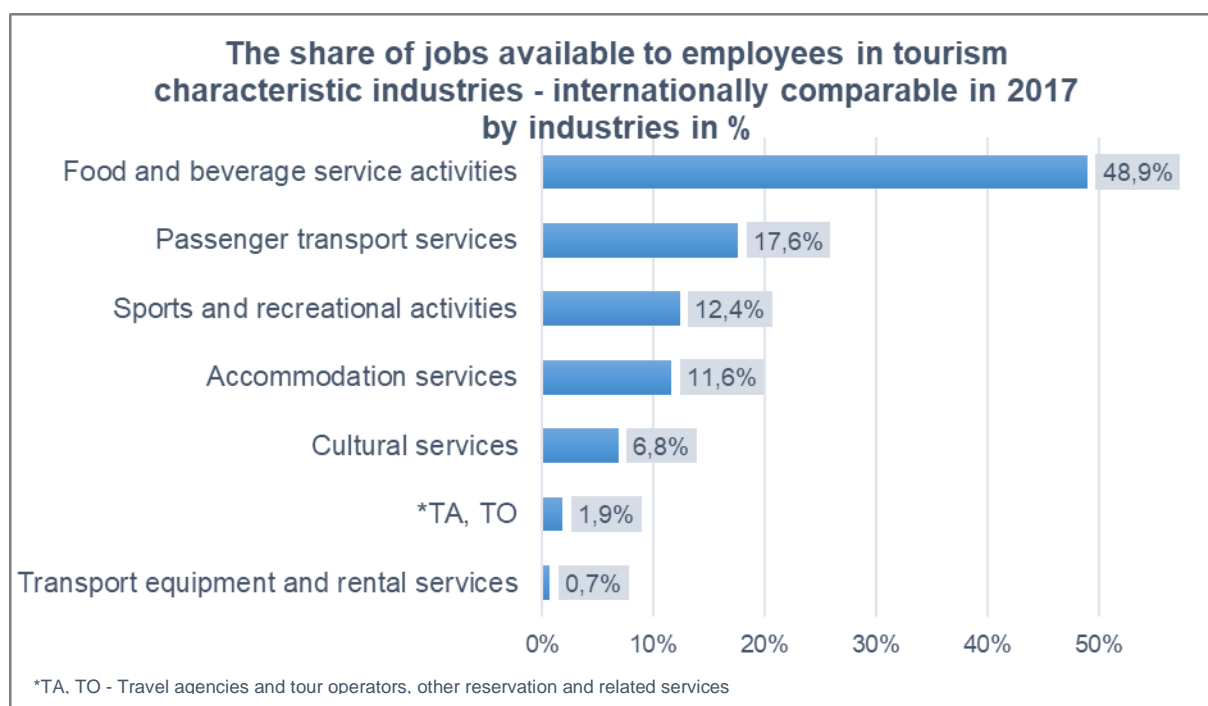
In the reference period, the average number of hours worked of employees represented 135 hours and of self-employed 166 hours per month.

In 2017, tourism characteristic industries – internationally comparable, provided almost 136 thousand FTE jobs for employees and approximately 17 thousand FTE jobs for entrepreneurs.

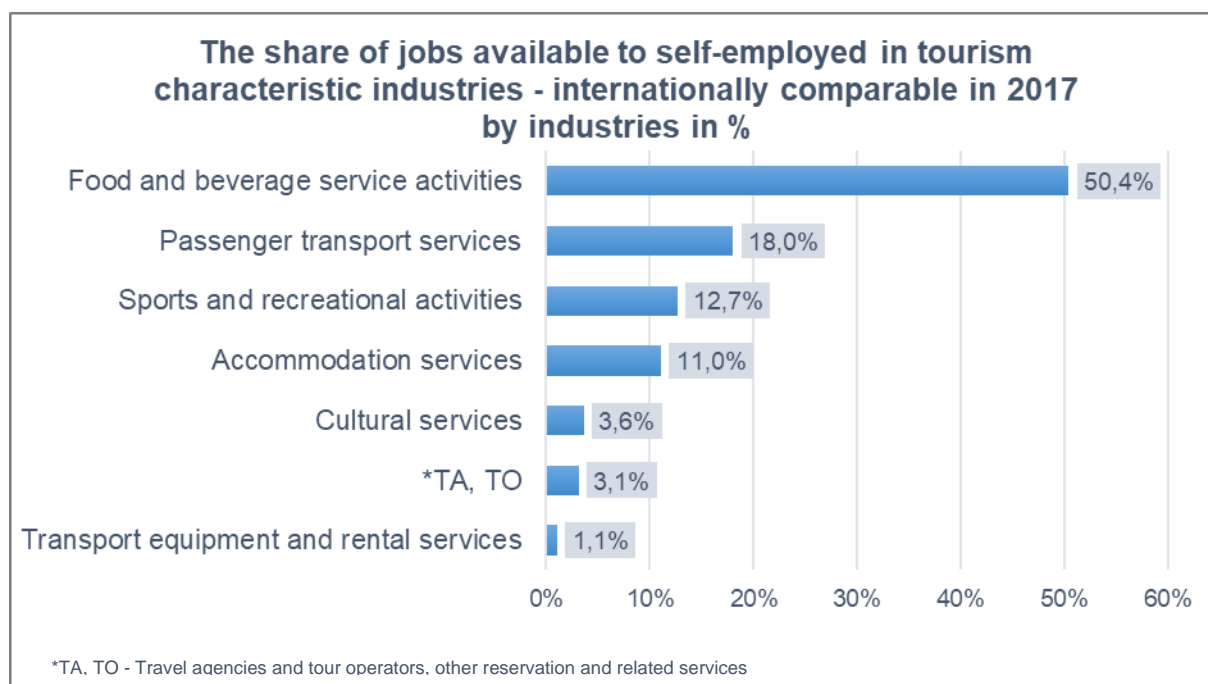
¹ Refers to a number of jobs recalculated for full-time equivalent jobs (FTE)

² Refers to the self-employed persons

The greatest number of jobs for employees were occupied in food and beverage service activities (48,9 %), passenger transport services (17,6 %), sports and recreational services (12,4 %), accommodation services (11,6 %). Cultural services reached the share of 6,8 %, travel agencies and other reservation services 1,9 % and transport equipment and rental services 0,7 %.



The greatest number of jobs for self-employed persons were occupied in food and beverage service activities (50,4 %), passenger transport services (18,0 %), sports and recreational services (12,7 %), accommodation services (11,0 %), cultural services (3,6 %). Travel agencies and other reservation services reached a 3,1 % share and transport equipment and rental services 1,1 %.



In 2017, the jobs for employees in tourism characteristic industries – internationally comparable, represented a 6,6 % of the total number of jobs in economy. Jobs for self-employed in tourism characteristic industries – internationally comparable, accounted for 4,7 % of the total number of jobs in the economy of the SR.

In 2017 in tourism characteristic industries – internationally comparable, the employees' hours worked in tourism-characteristic industries 6,6 % of the hours worked in economy. Regarding the tourism characteristic industries – internationally comparable, the self-employed' hours worked represented 5,1 % of the total number of hours worked in the economy of the SR.