CZECH REPUBLIC
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%

1 in 4 net new jobs were created by Travel & Tourism over the last five years

Global GDP impact by sector (2018 data). Share of total economy GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of Total Economy GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>7%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>10%</td>
</tr>
<tr>
<td>Retail</td>
<td>5%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>10%</td>
</tr>
</tbody>
</table>

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

CZECH REPUBLIC 2019 KEY DATA

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

6.5% OF TOTAL ECONOMY
Total T&T GDP = CZK365.5BN (USD15.9BN)

-0.1%
2019 Travel & Tourism GDP growth vs +2.6% real economy GDP growth

CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

414.4 JOBS (000’s)
(8.0% of total employment)

INTERNATIONAL VISITOR IMPACT

czK178.8 BN
in visitor spend (4.1% of total exports)
(USD7.8BN)

INBOUND ARRIVALS

- 1. GERMANY 20%
- 2. SLOVAKIA 7%
- 3. POLAND 6%
- 4. UNITED STATES 5%
- 5. RUSSIAN FEDERATION 5%
- REST OF WORLD 57%

OUTBOUND DEPARTURES

- 1. SLOVAKIA 26%
- 2. HUNGARY 9%
- 3. AUSTRIA 9%
- 4. ITALY 8%
- 5. CROATIA 7%
- REST OF WORLD 41%

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)

- LEISURE SPENDING 83%
- BUSINESS SPENDING 17%
- DOMESTIC SPENDING 46%
- INTERNATIONAL SPENDING 54%

1All values are in constant 2019 prices & exchange rates
As reported in March 2020