

Survey of Tourist Lodging Facilities in the Czech Republic
(Informative Material)

The Changed Conditions of Statistical Work

The first half of the 1990s characterized in transition economies by developing market orientation confronted the Czech statistical service with demanding tasks. The organization structures of state-owned enterprises and cooperatives disintegrated and the private sector was booming. The set of respondents has multiplied many times, the activity of reporting units, particularly in services (which account roughly for 1/2 of the register, i.e. over 500,000 units), has become more varied and in many respects quite new.

In these conditions individual branch statistics are switching to sample surveys and grossing. Nevertheless, this new approach, taking into account the declining reporting discipline in the new social and economic conditions, has not always produced the desired effect.

One of the areas, where we cannot make do with very rough data, are tourism statistics, particularly their most important parts - statistics of lodging facilities serving to calculate the total number of tourists.

Paradoxically enough, the reported numbers of overnight stays by foreign visitors in the Czech Republic have been falling since 1990 despite the flourishing tourism confirmed by data from border statistics. This discrepancy is caused both by increased non-response among large lodging facilities and by our failure to track a very large set of new, rather small lodging facilities that are not incorporated in the Business Register (operated by the court of law), but incorporated in the register run by the trade offices.

Up to 1993, not quite in harmony with the swift development, statistical surveys of lodging capacity were conducted only among entities incorporated in the Business Register. Although regular statistical surveys in 1994 embraced also unincorporated entities, they included, as grossing methods were not sufficiently resolved, only randomly selected respondents with important shares in lodging facilities of a given district (region).

The above makes clear that lodging facilities operated by unincorporated entrepreneurs with important shares in accommodation supply for domestic and foreign tourists were surveyed in an incomplete manner.

In order to bridge this gap, an extraordinary across-the-board statistical survey of unincorporated lodging facilities was carried out in September 1994 aimed at finding complex information on lodging capacity in tourism (numbers of lodging facilities by categories, numbers of rooms, beds, kinds of provided services) and on the numbers of foreign visitors to the Czech Republic and their overnight stays.

Preparatory Work

The design of the questionnaire for respondents was based on our users' requirements, and methodological recommendations of the World Tourism Organization and Eurostat were taken into consideration. At the same time, the design of the questionnaire was consulted with experts of INSEE (Statistical Office of France), which is the Czech Statistical Offices's cooperating partner for the Transition Project of tourism statistics. To ease the response burden, the questionnaire had to be clearly arranged and comprehensible, because essential for us was, on top of quality contents, a high response rate.

Based on the register of organizations, the survey embraced 13,671 entities with legal form 101 and with the main activity of NACE 55.1 (hotels, etc.), 55.2 (campsites and other temporary accommodation) and 55.0 (accommodation and catering)

Staff responsible for processing from all the district and regional statistical offices were instructed in detail on the contents of the questionnaire, methodology, organization and precise timetable of the survey as well as related software. These staff were also told how to demand the questionnaire from the respondents and how to recruit external workers and control their field work. In view of existing experience of non-response among unincorporated reporting units, on average 2-3 interviewers were supposed per one district and 20-30 interviewers for the capital of Prague.

The Survey Proper

The deadline for collecting completed questionnaires was fixed at 15 September 1994. All respondents who did not present their questionnaires by this date were sent a registered urgent reminder, the wording of which had been consulted with the legislative and legal unit of the Czech Statistical Office. If entrepreneurs failed to respond even following the receipt of this reminder, they were

visited by interviewers between 26 September and 9 October 1994. In total 176 interviewers gained 2,665 questionnaires, which represented an average of 15 questionnaires and labour cost of 850 CZK per one interviewer. Thus we were able to lower the usual non-response level by as much as three quarters.

Survey Results

In spite of the fact that the time for the preparation and implementation was relatively short, the survey was a success. Owing to good cooperation with the district and regional statistical offices that were most careful with data collection and processing, the response rate from unincorporated respondents reached unprecedented 93.8 %.

However, out of 12,828 respondents in total who returned questionnaires, only 54.5 % of them provided accommodation services to tourism in the given period from 1 January to 31 August (which was the decisive day for the survey). 14.8 % of respondents had not yet started their business, 13.9 % did no business at all in the given period, 6.5 % did business in a different field (mostly in public catering) and the remaining 10.3 % did no business in accommodation services due to other reasons. This group also included entrepreneurs accommodating in their lodging facilities Czech residents and foreigners exclusively for the purpose of work. These data prove the relatively poor quality of the register of respondents maintained by the Czech Statistical Office.

The results were grossed to the whole set and, taking into account the seasons, also to the whole calendar year. All data mentioned below are applied in their grossed form.

Structure of Lodging Facilities

Among lodging facilities run by unincorporated entrepreneurs, the most prevalent is the category of a separate room/separate rooms in a dwelling, in a family house, in a weekend house (only part of a lodging facility is let), which makes up 52.8 % of the total number of all lodging facilities. The second is the category of the whole dwelling (whole family house, whole weekend house) with a 22.1 % share. The smallest shares constitute the categories of good hotels (****, ***) and campsites with only 1.7 % each.

The average number of days in which lodging facilities provided their services (operating days) reached 236, i.e. 64.7 %

of all days in a year with pensions (274 days) and hotels **, * (273 days) being on top. The shortest opening season had campsites (146 days in a year).

Structure of lodging facilities by categories
and average number of operating days

Category	Total No. of lodging facilities	Structure (%)	Average No. of operating days per 1 facility
Separate rooms	3,951	52.8	239
Whole dwelling	1,653	22.1	206
Pension	902	12.1	274
Hotel ****, ***	125	1.7	263
Hotel **, *	281	3.8	273
Tourist hostel	220	2.9	262
Campsite (places)	124	1.7	146
N.e.c.	217	2.9	224
Total	7,473	100.0	236

Capacity of Lodging Facilities

Capacity of lodging facilities run by unincorporated entrepreneurs with 4 rooms on average per one facility is substantially smaller than that of incorporated entrepreneurs, which makes up 37 rooms. The largest average number of rooms fell on hotel **, * (19 rooms) and hotel ****, *** (18 rooms).

Among the total number of rooms, single rooms accounted for 4.9 %, twin rooms for 52.4 %, rooms with three or more beds for 42.7 %.

The most of beds available were in the category of separate rooms (18.9 % out of the total) and in pensions (18.2 % out of the total). The average number of beds per one lodging facility represented 15. Just compare - facilities run by incorporated

entrepreneurs reported 111 beds on average per one lodging facility. The highest average number of beds per one facility - 54 - falls on the category of a tourist hostel, on hotel **, * (49 beds) and on hotel ****, *** (42 beds). The average capacity of the category campsite represented 149 beds including places in the open (for tents, etc.).

Staff

Staff employed in lodging facilities run by unincorporated entrepreneurs (i.e. excluding working owners and contributing family workers) reached 6,865 in total, including 824 (i.e. 12 %) who worked part-time. On average only staff of 1 worked in one lodging facility, only hotels ****, *** employed 12 on average and hotels **, * 9 workers. On average there were 2 employees per one lodging facility in the categories pension and tourist hostel and 1 employee per one campsite. These figures suggest that most unincorporated entrepreneurs run lodging facilities by themselves assisted only by contributing family workers.

Capacity of lodging facilities and staff

Category	Number of rooms	Number of beds (places)	Staff	
			total	including working part-time
Separate rooms	8,136	21,066	55	8
Whole dwelling	4,172	11,100	77	4
Pension	7,005	20,326	1,586	244
Hotel ****, ***	2,277	5,227	1,498	98
Hotel **, *	5,343	13,846	2,602	205
Tourist hostel	2,874	11,981	516	134
Campsite (places)	168	18,515	167	62
N.e.c.	2,132	9,424	364	69
Total	32,107	111,485	6,865	824

Provided Services

In addition to detailed information on the structure and capacity of lodging facilities, the survey supplied us with data on the scope of services provided by unincorporated entrepreneurs in their facilities. These services can be classified to catering and to other services (e.g. parking and sports amenities, renting of various articles, secretary services).

The survey results say that catering services were prevailing, particularly breakfast (offered by 33.3 % of lodging facilities); lunch is offered by 14.0 % and dinner by 16.4 % of all lodging facilities. In most hotels ****, *** and hotels **, * complete catering services are on offer. Breakfast, lunch and dinner can be provided in 80.5 %, in 42.4 % and in 52.9 % of all pensions, respectively.

In the field of other services, particularly parking amenities are offered. 31.0 % of lodging facilities reported the possibility to park inside the house and 19.9 % have an attended car park nearby.

The renting of articles of sports and culture is possible in 22.5 % of lodging facilities. A swimming pool is available in 4.8 %, sauna in 2.8 % and fitness centre (massage) only in 1.0 % of lodging facilities, sports amenities (tennis, skittle) are offered in 7.5 % of the total number of lodging facilities.

The level of equipment with telephone (telefax) is generally low - they are available to guests only in 26.9 % of all facilities; secretary services (translating, photocopying, procuring sight-seeing tours or tickets, trips, etc.) are offered only by 4.5 % of lodging facilities.

Numbers of Guests

The total number of guests in lodging facilities covered by the survey amounted to 1.716 million, including 756 thousand (44.1 %) foreigners. Foreign guests preferred above all accommodation in large facilities such as pensions, where 24.1 % of them were put up, and hotels **, * (21.7 %). 16.9 % of all foreigners found accommodation in separate rooms.

On average, 230 guests, including 101 foreigners, found accommodation in one lodging facility in 1994.

Germany, the Netherlands, Poland, Austria and Italy accounted for 56.3 %, 7.5 %, 5.9 %, 3.5 % and 2.8 %, respectively, of all foreign guests. The average duration of stay of a foreigner was 4.4 days with guests from Poland (5.5 days), the Netherlands (5.2 days) and Denmark (4.7 days) staying longest.

Numbers of guests

Category	Numbers of guests		Shares of foreigners (%)
	total	including foreigners	
Separate rooms	175,466	127,450	72.6
Whole dwelling	83,134	44,217	53.2
Pension	388,398	182,465	47.0
Hotel ****, ***	175,867	101,849	57.9
Hotel **, *	421,378	163,760	38.9
Tourist hostel	187,409	65,088	34.7
Campsite (places)	176,493	54,485	30.9
N.e.c.	107,687	16,986	15.8
Total	1,715,832	756,300	44.1

Average Price per Head and Night

Also surveyed was the average price for accommodation in CZK per head and night. Both price declared (i.e. price fixed by the person running a lodging facility) and price achieved (i.e. price adjusted to the demand for accommodation) were measured. The survey revealed that price achieved for a Czech resident represented on average 96.0 % of price declared.

Survey Benefits

As an important benefit of the survey can be regarded the fact of gaining quite new, previously not covered information on the structure, capacity and use of lodging facilities run by unincorporated entrepreneurs. These data gave us a more complex insight into accommodation services provided in the Czech Republic and can help

us find and arrange new destinations for foreign guests in less well-known regions of this country. The survey results will thus be aimed, on top of statistical purposes, at the promotion abroad of tourism in the Czech Republic.

Among important contributions of the survey for tourism statistics was the creation of a register of surveyed lodging facilities run by unincorporated entrepreneurs.

At the moment we are eliminating some "blank spots" in the register of incorporated respondents (by analyzing non-response, by using administration data sources, etc.).

By doing so, we prepare ourselves for a change to be implemented next year. We shall send our questionnaires not to the legal entity - reporting unit, but directly to its part - the relevant lodging facility. The closer relationship between the district and regional statistical offices on the one hand and respondents on the other should result in our better knowledge of the set, higher response rate (due to easier contacts with respondents) and generally more reliable results of tourism statistics.