One in seven businesses belong to the tourism industries

Tourism industries - economic analysis

This article presents recent statistics on the tourism industries in the European Union (EU) . While tourism statistics traditionally focus on either the accommodation sector or the demand side (from a household perspective), and relate mainly to physical flows (arrivals or nights spent at tourist accommodation establishments or trips made by residents of a country), this analysis is based on economic data extracted from other areas of official statistics, in particular structural business statistics (SBS) and short-term business statistics (STS) . Thus a more complete economic picture can be drawn of this sector, which is an important motor for many countries' economies and labour markets.

IRTS / TSA:RMF tourism characteristic activities	ISIC Rev.4([1])	NACE Rev.2([2])	Description (NACE Rev.2)
1. Accommodation for visitors	5510	5510	Hotels and similar accommodation
		5520	Holiday and other short-stay accommodation
	5520	5530	Camping grounds, recreational vehicle parks and trailer parks
	5590	5590	Other accommodation
	6810	6810	Buying and selling of own real estate
		6820	Renting and operating of own or leased real estate
	6820	6831	Real estate agencies
		6832	Management of real estate on a fee or contract basis
2. Food and beverage serving activities	5610	5610	Restaurants and mobile food service activities
	5629	5629	Other food service activities
	5630	5630	Beverage serving activities
3. Railway passenger transport	4911	4910	Passenger rail transport, interurban
4. Road passenger transport	4922	4932	Taxi operation
		4939	Other passenger land transport n.e.c.
5. Water passenger transport	5011	5010	Sea and coastal passenger water transport
	5021	5030	Inland passenger water transport
6. Air passenger transport	5110	5110	Passenger air transport
7. Transport equipment rental	7710	7711	Renting and leasing of cars and light motor vehicles
		7712	Renting and leasing of trucks
8. Travel agencies and other reservation services activities	7911	7911	Travel agency activities
	7912	7912	Tour operator activities
	7990	7990	Other reservation service and related activities
9. Cultural activities	9000	9001	Performing arts
		9002	Support activities to performing arts
		9003	Artistic creation
		9004	Operation of arts facilities
	9102	9102	Museums activities
		9103	Operation of historical sites and buildings and similar visitor attractions
	9103	9104	Botanical and zoological gardens and nature reserves activities
10. Sports and recreational activities	7721	7721	Renting and leasing of recreational and sports goods
	9200	9200	Gambling and betting activities
	9311	9311	Operation of sports facilities
		9313	Fitness facilities
	9321	9321	Activities of amusement parks and theme parks
	9329	9329	Other amusement and recreation activities
11. Retail trade of country-specific tourism characteristic goods	-		
12. Other country-specific tourism characteristic activities	-		

([1]) Source: IRTS 2008 – Draft Compilation Guide (November 2010) – unpublished ; Annex 3, p. 130.
([2]) Source: conversion table ISIC Rev.4 – NACe Rev.2 (http://unstats.un.org/unsd/cr/registry/regso.asp?Ci=70)

Table 1: List of tourism characteristic activities

The publication ' International Recommendations for Tourism Statistics 2008 ' lists ten internationally comparable activities and two country-specific ones for the tourism sector, also called 'tourism industries' or 'tourism characteristic activities'. This article focuses on the former, the internationally comparable ones (see Table 1 for an overview and their corresponding ISIC and NACE codes). Except for the ones in the area of culture, sports and recreation, these activities are covered by SBS.

The reader is strongly encouraged to consult the ' Data sources and availability ' section before using the presented data, in order to avoid overestimating the economic importance of tourism for some industries.

Main statistical findings

The discussion below refers to four selected indicators: number of enterprises , number of persons employed , turnover and value added at factor cost – firstly at EU level, secondly at country level.

In 2010, more than one in seven enterprises in the European non-financial business economy belonged to the tourism industries (see Table 2, Table 3, Figure 1). These 3.4 million enterprises employed an estimated 15.2 million persons. Enterprises in industries with tourism related activities accounted for 11% of the persons employed in the non-financial business economy and 29% of persons employed in the services sector.

	NACE Rev.2	Number of enterprises	Number of persons employed	Turnover (million EUR)	Value added at factor cost (million EUR)
Total non-financial business economy([1])		21 927 107	133 577 542	23 755 067	5 955 387
Total services([2])		10 088 825	53 260 448	5 254 787	2 342 716
Total tourism industries([3])		3 389 515	15 215 768	1 324 564	557 860
Mainly tourism([4])		329 319	3 082 090	382 143	108 738
Partially tourism([5])		3 060 196	12 010 168	938 225	447 338
Transport related		340 455	2 092 691	236 365	89 096
Passenger rail transport, interurban([6])	H4910	365	483 600	56 087	27 219
Taxi operation	H4932	282 396	593 857	18 665	11 210
Other passenger land transport n.e.c.([7])	H4939	40 726	564 135	33 724	18 409
Sea and coastal passenger water transport	H5010	6 036	74 852	17 493	5 537
Inland passenger water transport([8])	H5030	3 721	18 511	1 306	643
Passenger air transport([8])	H5110	3 401	355 100	109 089	25 996
Accommodation related		269 634	2 365 274	138 048	64 012
Hotels and similar accommodation	I5510	150 053	1 982 016	113 773	53 756
Holiday and other short-stay accommodation	I5520	91 523	254 012	14 545	5 870
Camping grounds, recreational vehicle parks and trailer parks	I5530	16 029	86 025	7 717	3 497
Other accommodation	I5590	12 029	43 168	2 014	888
Food related		1 494 827	7 426 892	314 458	125 172
Restaurants and mobile food service activities	I5610	846 340	4 686 640	200 471	80 126
Other food service activities	I5629	28 931	611 539	30 328	14 132
Beverage serving activities	I5630	619 556	2 128 661	83 659	30 914
Real estate		1 146 330	2 649 377	426 873	225 183
Buying and selling of own real estate([9])	L6810	117 843	182 612	40 149	9 889
Renting and operating of own or leased real estate	L6820	702 498	1 445 250	297 048	170 367
Real estate agencies	L6831	228 047	542 577	44 373	22 307
Management of real estate on a fee or contract basis	L6832	97 942	478 938	45 303	22 484
Car and other rental		46 741	181 414	61 210	30 240
Renting and leasing of cars and light motor vehicles([8])	N7711	27 617	131 400	52 000	26 110
Renting and leasing of trucks([10])	N7712	6 410	22 800	7 352	3 411
Renting and leasing of recreational and sports goods	N7721	12 714	26 323	1 858	719
Travel agencies and tour operators		91 525	499 767	145 560	22 274
Travel agency activities	N7911	48 385	299 176	75 034	12 491
Tour operator activities	N7912	19 978	141 241	63 703	7 859
Other reservation service and related activities([11])	N7990	23 162	59 350	6 823	1 925

Note: Due to unreliable data at country level and rounding, deviations can occur between total and subtotals.
([1]) NACE sections: B-N_S95_X_K - Total business economy; repair of computers, personal and household goods; except financial and insurance activities.
([2]) NACE sections: H, I, J, L, M, N and S95.
([3]) NACE classes: H4910, H4932, H4939, H5010, H5030, H5110, I5510, I5520, I5530, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721, N7911, N7912 and N7990.
([4]) NACE clases: H5110, I5510, I5520, I5530, I5590, N7911 and N7912. Not including HR for persons employed, turnover and value added.
([5]) NACE classes: H4910, H4932, H4939, H5010, H5030, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721 and N7990. Not including HR for persons employed, turnover and value added.
([6]) EU28 aggregate for number of persons employed, turnover and value added is not including HR.
([7]) EU28 aggregate for number of enterprises is not including CZ, IE, EL and MT.
([8]) EU28 aggregate for turnover is not including DK, EE, IE, EL, LU, MT, NL, SK and FI .
([9]) EU28 aggregate for value added at factor cost is not including IE, EL, MT, NL and FI.
([10]) EU28 aggregate for number of persons employed is not including HR; EU28 aggregate for turnover and value added at factor cost is not including CZ, EE, IE, EL, ES, HR, LT, LU, MT and NL.
([11]) EU28 aggregate for turnover and value added at factor cost is not including CZ, EL, LU, MT and NL.

Table 2: Key economic indicators for the tourism industries, EU-28, 2010 - Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

The tourism industries' shares in total turnover and value added at factor cost were relatively lower, with the tourism industries accounting for 6% of the turnover and 9% of the value added of the non-financial business economy. These figures very likely reflect - among other explanations - the higher share of micro, small and medium-sized enterprises and of the level of part-time employment in some typical tourism industries.

	NACE Rev.2	Number of enterprises	Number of persons employed	Turnover (millon EUR)	Value added at factor cost (million EUR)
Total tourism industries(³) as share of Total non-financial business economy(¹)		15	11	6	9
Total tourism industries as share of Total Services(²)		34	29	25	24
Total tourism industries(¹)		100	100	100	100
As share of total tourism industries:					
Mainly tourism(⁴)		10	20	29	19
Partially tourism(⁵)		90	79	71	80
Transport related		10	14	18	16
Passenger rail transport, interurban(⁶)	H4910	<0.5	3	4	5
Taxi operation	H4932	8	4	1	2
Other passenger land transport n.e.c.(⁷)	H4939	1	4	3	3
Sea and coastal passenger water transport	H5010	<0.5	<0.5	1	1
Inland passenger water transport(⁶)	H5030	<0.5	<0.5	<0.5	<0.5
Passenger air transport(⁶)	H5110	<0.5	2	8	5
Accommodation related		8	16	10	11
Hotels and similar accommodation	I5510	4	13	9	10
Holiday and other short-stay accommodation	I5520	3	2	1	1
Camping grounds, recreational vehicle parks and trailer parks	I5530	<0.5	1	1	1
Other accommodation	I5590	<0.5	<0.5	<0.5	<0.5
Food related		44	49	24	22
Restaurants and mobile food service activities	I5610	25	31	15	14
Other food service activities	I5629	1	4	2	3
Beverage serving activities	I5630	18	14	6	6
Real estate		34	17	32	40
Buying and selling of own real estate(⁹)	L6810	3	1	3	2
Renting and operating of own or leased real estate	L6820	21	9	22	31
Real estate agencies	L6831	7	4	3	4
Management of real estate on a fee or contract basis	L6832	3	3	3	4
Car and other rental		1	1	5	5
Renting and leasing of cars and light motor vehicles(⁹)	N7711	1	1	4	5
Renting and leasing of trucks(¹⁰)	N7712	<0.5	<0.5	1	1
Renting and leasing of recreational and sports goods	N7721	<0.5	<0.5	<0.5	<0.5
Travel agencies and tour operators		3	3	11	4
Travel agency activities	N7911	1	2	6	2
Tour operator activities	N7912	1	1	5	1
Other reservation service and related activities(¹¹)	N7990	1	<0.5	1	<0.5

Note: Due to unreliable data at country level and rounding, deviations can occur between total and subtotals.
(¹) NACE sections: B-N_S95_X_K - Total business economy; repair of computers, personal and household goods; except financial and insurance activities.
(²) NACE sections: H, I, J, L, M, N and S95.
(³) NACE classes: H4910, H4932, H4939, H5010, H5030, H5110, I5510, I5520, I5530, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721, N7911, N7912 and N7990.
(⁴) NACE clases: H5110, I5510, I5520, I5530, N7911 and N7912. Not including HR for persons employed, turnover and value added.
(⁵) NACE classes: H4910, H4932, H4939, H5010, H5030, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721 and N7990. Not including HR for persons employed, turnover and value added.
(⁶) EU28 aggregate for number of persons employed, turnover and value added is not including HR.
(⁷) EU28 aggregate for number of enterprises is not including CZ, IE, EL and MT.
(⁸) EU28 aggregate for turnover is not including DK, EE, IE, EL, LU, MT, NL, SK and FI .
(⁹) EU28 aggregate for value added at factor cost is not including IE, EL, MT, NL and FI.
(¹⁰) EU28 aggregate for number of persons employed is not including HR; EU28 aggregate for turnover and value added at factor cost is not including CZ, EE, IE, EL, ES, HR, LT, LU, MT and NL.
(¹¹) EU28 aggregate for turnover and value added at factor cost is not including CZ, EL, LU, MT and NL.

Table 3: Key economic indicators for the tourism industries, percentages, EU-28, 2010 - Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

As explained in the "Data sources and availability" section, tourism industries do not provide services only to tourists. Their employment, turnover, etc. can also be related to services provided to non-tourists. In Tables 2 and 3, the subdivision "mainly tourism" and "partially tourism" tries to take this into account. For instance, 3 million persons are employed in industries that are assumed to serve predominantly tourists while 12 million persons are employed in industries where the customers are likely to be a mix of tourists and non-tourists.

Analysis by subsectors

More than one in two enterprises in the tourism industries operated in accommodation (NACE I55) or food and beverage serving activities (NACE I56), 8% and 44% respectively (see Table 2, Table 3, Figure 1). When looking at the number of persons employed, the weight of these activities was even more pronounced representing nearly 2 out of every 3 jobs in the tourism industries. However, in terms of turnover and value added, their share was 34%, while the share of real estate activities (NACE L68) accounted for 32% of the turnover and 40% of the value added at factor cost generated by the tourism industries.

Number of enterprises

9.9 %
8.0 %
44.2 %
33.8 %
1.4 %
2.7 %
30.6 %
15.5 %
54.0 %

Persons employed

13.8 %
15.5 %
48.8 %
17.4 %
1.2 %
3.3 %
28.5 %
11.4 %
60.1 %

Turnover

17.9 %
10.4 %
23.8 %
32.3 %
4.6 %
11.0 %
16.5 %
5.6 %
77.8 %

Value added

16.0 %
11.5 %
22.5 %
40.6 %
5.4 %
4.0 %
30.0 %
9.3 %
60.7 %

- Business economy other than services
- Services other than tourism industries
- Tourism industries - Transport related
- Tourism industries - Accommodation related
- Tourism industries - Food related
- Tourism industries - Real estate
- Tourism industries - Car and other rental
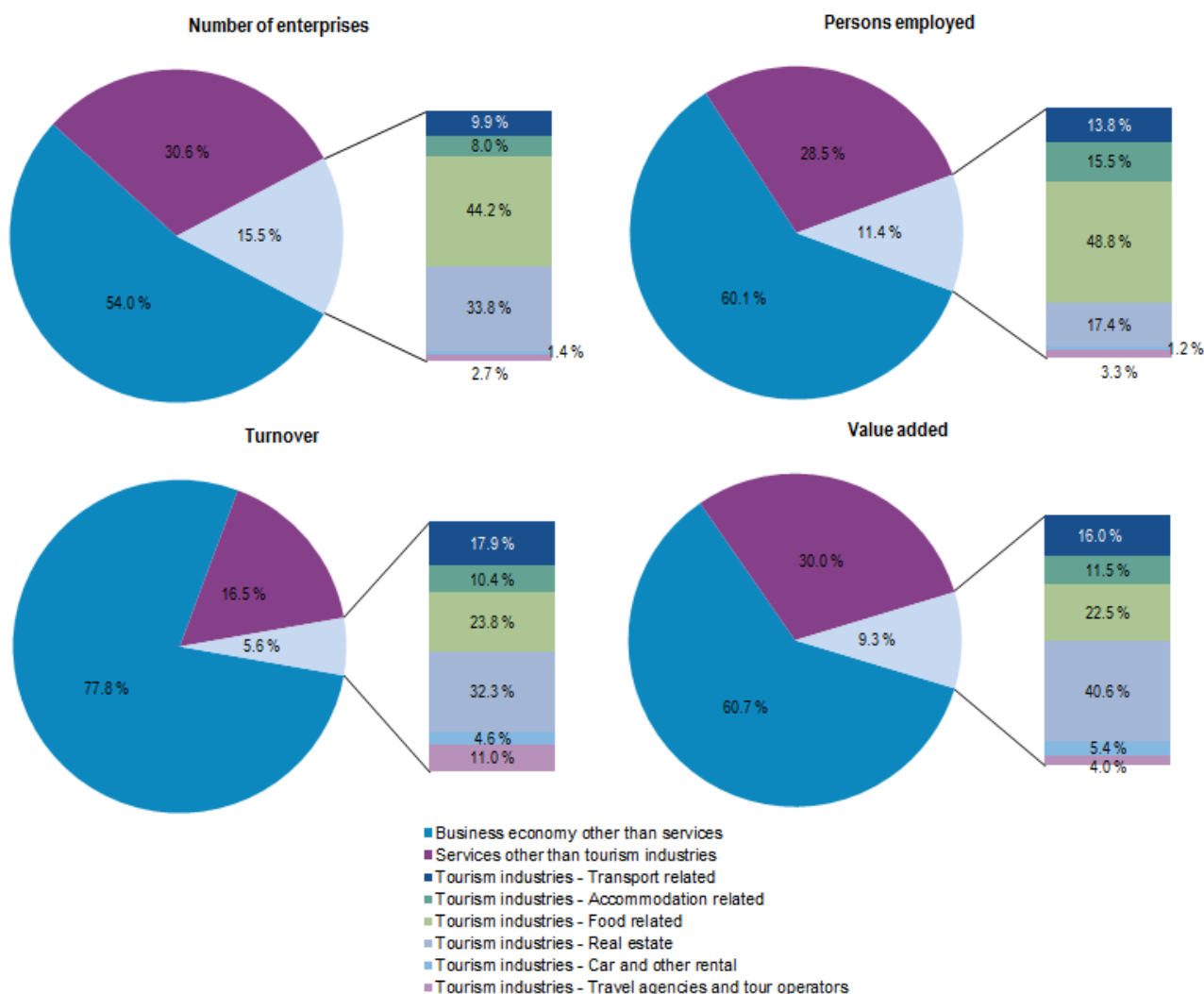- Tourism industries - Travel agencies and tour operators

Figure 1: Number of enterprises, number of persons employed, turnover and value added at factor cost, EU-28, 2010 - Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

The turnover of passenger transport related industries (parts of NACE H49, H50, H51) represented 18% of the turnover for all tourism industries: nearly half of this share cam from the subsector of passenger air transport (NACE H5110).

Travel agencies (NACE N7911) and tour operators (NACE N7912) recorded a turnover of 75 billion and 64 billion euro respectively in 2010. The two activities taken together represented 11% of the turnover in tourism industries, as compared to a 4% share in value added at factor cost, a 3% share in employment and a 2% share in number of enterprises.

Geographical analysis

Out of the 3.4 million enterprises in the tourism industries in the EU in 2010, 56% were located in four Member States: 561 319 in Italy, 473 932 in Spain, 438 861 in France and 426 330 in Germany (see Table 4).

	Total non-financial business economy(1)	Tourism industries, of which: Tourism industries(2)	of which: Mainly tourism(3)	Partially tourism(4)	Tourism industries, of which: Transport related(5)	Accommodation related(6)	Food related(7)	Real estate(8)	Car and other rental(9)	Travel agencies and Tour operators(10)
EU-28	21 927 107	3 389 515	329 319	3 060 196	340 455	269 634	1 494 827	1 146 330	46 741	91 525
BE	538 545	84 893	:	:	2 723	3 274	41 971	33 852	1 210	1 862
BG	313 079	:	4 560	:	:	3 472	22 492	17 903	1 060	1 556
CZ	968 121	117 606	11 176	106 430	5 839	9 923	:	45 002	:	6 130
DK	208 237	41 839	1 925	39 914	3 435	1 503	11 335	24 691	365	510
DE	2 073 915	426 330	53 755	372 575	23 844	44 768	168 380	174 515	4 374	10 449
EE	52 180	7 684	865	6 819	380	597	1 343	4 634	400	330
IE	152 693	25 744	2 487	23 257	:	2 136	12 799	8 428	:	463
EL	:	:	:	:	:	:	:	:	:	:
ES	2 500 574	473 932	30 639	443 293	62 067	23 197	:	120 815	3 324	10 798
FR	2 513 679	438 861	40 388	398 474	38 833	36 650	195 552	149 724	12 140	5 962
HR	165 490	29 589	4 234	25 355	2 309	2 631	16 663	5 483	592	1 911
IT	3 867 813	561 319	54 335	506 984	28 864	44 498	247 773	222 083	3 815	14 286
CY	46 354	7 881	950	6 931	1 150	543	4 799	683	187	519
LV	81 319	17 230	1 312	15 919	714	765	2 323	11 868	927	633
LT	114 511	12 517	1 541	10 976	651	1 194	2 791	6 706	453	722
LU	28 345	5 922	412	5 510	188	319	2 489	2 714	109	103
HU	554 886	:	4 288	:	:	3 456	29 087	33 196	1 094	1 927
MT	:	:	:	:	:	:	:	:	:	:
NL	777 869	81 345	10 113	71 232	6 442	7 157	33 047	29 917	1 511	3 271
AT	301 739	68 638	15 634	53 004	5 350	14 934	28 936	17 163	701	1 554
PL	1 480 097	139 018	17 414	121 604	47 415	13 114	33 525	36 140	2 151	6 673
PT	861 135	128 736	7 823	120 913	11 679	6 478	78 473	29 019	724	2 363
RO	447 091	48 429	5 665	42 764	7 591	4 918	19 038	13 586	727	2 569
SI	115 243	12 205	1 455	10 750	1 150	1 011	7 091	2 135	181	637
SK	406 084	29 699	:	:	4 100	2 627	13 572	7 511	781	1 108
FI	224 505	39 323	1 488	37 835	9 562	1 724	9 102	17 081	431	1 423
SE	618 478	90 068	7 402	82 666	9 671	5 176	:	48 979	1 063	3 333
UK	1 649 086	219 659	20 704	198 955	11 299	15 077	107 022	75 289	4 607	6 365
NO	268 022	62 397	3 604	58 793	7 114	2 827	6 873	43 147	663	1 773
CH	135 532	21 143	:	:	:	:	:	:	:	:

Note: Due to unreliable data at country level and rounding, deviations can occur between total and subtotals.
(1) NACE sections: B-N_S95_X_K - Total business economy; repair of computers, personal and household goods; except financial and insurance activities.
(2) NACE classes: H4910, H4932, H4939, H5010, H5030, H5110, I5510, I5520, I5530, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721, N7911, N7912 and N7990.
(3) NACE clases: H5110, I5510, I5520, I5530, N7911 and N7912.
(4) NACE classes: H4910, H4932, H4939, H5010, H5030, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721 and N7990.
(5) NACE classes: H4910, H4932, H4939, H5010, H5030 and H5110.
(6) NACE classes: I5510, I5520, I5530 and I5590.
(7) NACE classes: I5610, I5629 and I5630.
(8) NACE classes: L6810, L6820, L6831 and L6832.
(9) NACE classes: N7711, N7712 and N7721.
(10) NACE classes: N7911, N7912 and N7990.
":" : Aggregate not available due to one or more unreliable components at NACE 4 digit level.

Table 4: Number of enterprises, 2010 - Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

In terms of employment (see Table 5), Germany recorded 2.7 million persons employed in the tourism industries, followed by the United Kingdom (2.5 million), Italy (1.8 million) and Spain (1.7 million) (no data available for France). The highest shares of employment in the tourism industries in the total non-financial business economy were observed in Ireland (18%) and the Netherlands (15%), followed by Austria, the United Kingdom and Spain (14%) (note that data on total employment in the tourism industries is missing for a significant number of countries).

	Total non-financial business economy(¹)	Tourism industries, of which: Tourism industries(²)	Tourism industries, of which: Mainly tourism(³)	Partially tourism(⁴)	Transport related(⁵)	Tourism industries, of which: Accom-modation related(⁶)	Food related(⁷)	Real estate(⁸)	Car and other rental(⁹)	Travel agencies and Tour operators(¹⁰)
EU-28	133 577 542	15 215 768	3 082 090	12 010 168	2 092 691	2 365 274	7 426 892	2 649 377	181 414	499 767
BE	2 649 160	241 048	:	:	18 180	21 893	136 789	51 214	3 767	9 206
BG	1 927 935	:	43 564	:	:	36 928	100 116	35 490	1 869	6 263
CZ	3 460 140	274 028	:	:	42 083	34 520	:	57 906	2 345	12 092
DK	1 505 933	:	27 687	:	:	19 462	72 047	53 072	1 344	5 045
DE	24 932 382	2 702 381	624 148	2 078 232	296 824	495 870	1 360 303	440 747	24 633	84 004
EE	365 677	35 147	7 149	27 998	:	5 451	12 155	10 699	:	1 510
IE	1 080 859	189 605	56 475	133 129	:	45 859	93 753	21 597	:	4 495
EL	:	:	:	:	:	:	:	:	:	:
ES	11 989 152	1 654 188	327 158	1 327 030	188 139	252 265	:	202 050	17 385	54 174
FR	15 208 233	:	295 564	:	395 341	201 107	763 751	299 193	:	39 418
HR	1 075 442	123 510	:	:	13 191	32 421	59 940	10 477	1 314	6 167
IT	15 309 796	1 817 243	346 886	1 470 357	158 906	284 259	965 607	346 188	13 358	48 925
CY	242 049	:	:	:	:	16 874	23 151	1 700	731	2 640
LV	540 151	67 164	8 083	59 082	7 006	5 205	20 111	31 387	1 484	1 971
LT	775 203	72 017	8 513	63 504	16 179	5 699	28 218	18 092	:	2 649
LU	232 228	:	:	:	:	3 333	12 730	:	312	:
HU	2 437 262	:	28 890	:	:	23 732	105 458	69 329	2 925	5 524
MT	:	:	:	:	:	:	:	:	:	:
NL	3 864 883	586 079	117 715	468 364	109 793	73 698	288 485	82 137	8 102	23 864
AT	2 557 287	366 673	121 847	244 826	47 069	105 232	155 329	44 570	3 291	11 182
PL	8 372 380	540 116	86 774	453 342	129 476	66 837	150 971	166 307	6 255	20 270
PT	3 257 064	:	73 199	:	:	54 019	234 186	51 311	4 374	9 965
RO	3 713 223	250 470	50 907	199 563	57 259	43 495	94 273	44 383	2 019	9 041
SI	604 720	:	11 943	:	:	10 334	23 164	5 069	319	1 898
SK	1 471 438	95 289	:	:	11 846	12 538	39 779	25 753	2 080	3 293
FI	1 418 193	126 763	:	:	39 446	11 898	49 756	19 117	1 558	4 987
SE	2 892 259	:	:	239 335	:	41 439	:	74 923	2 705	12 166
UK	17 738 876	2 487 677	:	:	243 845	378 338	1 247 572	473 598	43 160	101 166
NO	1 447 456	156 249	36 930	119 319	42 321	26 223	54 452	26 209	1 595	5 449
CH	2 560 014	273 525	:	:	:	:	:	:	:	:

Note: Due to unreliable data at country level and rounding, deviations can occur between total and subtotals.

(¹) NACE sections: B-N_S95_X_K - Total business economy; repair of computers, personal and household goods; except financial and insurance activities.
(²) NACE classes: H4910, H4932, H4939, H5010, H5030, H5110, I5510, I5520, I5530, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721, N7911, N7912 and N7990.
(³) NACE clases: H5110, I5510, I5520, I5530, N7911 and N7912.
(⁴) NACE classes: H4910, H4932, H4939, H5010, H5030, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721 and N7990.
(⁵) NACE classes: H4910, H4932, H4939, H5010, H5030 and H5110.
(⁶) NACE classes: I5510, I5520, I5530 and I5590.
(⁷) NACE classes: I5610, I5629 and I5630.
(⁸) NACE classes: L6810, L6820, L6831 and L6832.
(⁹) NACE classes: N7711, N7712 and N7721.
(¹⁰) NACE classes: N7911, N7912 and N7990.
":" : Aggregate not available due to one or more unreliable components at NACE 4 digit level.

Table 5: Number of persons employed, 2010 - Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

The availability of the monetary indicators is very fragmented, but for Germany, the biggest EU economy, turnover and value added of the tourism industries amounted to 228 billion and 110 billion euro respectively (see Table 6, Table 7). Expressed as share of the total non-financial business economy, the German tourism industries accounted for 5% of the total turnover and 9% of the total value added at factor cost.

	Total non-financial business economy([1])	Tourism industries,of which:Tourism industries([2])	of which:Mainly tourism([3])	Partially tourism([4])	Transport related([5])	Accom-modation related([6])	Food related([7])	Real estate([8])	Car and other rental([9])	Travel agencies and Tour operators([10])
EU-28	23 755 067	1 324 564	382 143	938 225	236 365	138 048	314 458	426 873	61 201	145 560
BE	896 556	35 551	:	:	6 174	2 086	9 027	8 682	3 535	6 047
BG	93 689	3 676	1 244	2 432	696	554	8 776	1 097	82	369
CZ	409 590	16 047	:	:	2 136	1 416	:	6 811	515	1 736
DK	428 893	:	6 338	:	:	1 618	3 920	11 372	676	2 718
DE	5 030 225	227 520	58 476	169 044	33 490	21 649	40 728	101 045	7 574	23 034
EE	36 580	2 012	427	1 585	:	181	271	735	:	158
IE	302 398	17 172	8 537	8 635	:	2 283	5 249	1 542	:	1 341
EL	:	:	:	:	:	:	:	:	:	:
ES	1 783 684	117 417	41 677	75 740	17 489	16 201	:	21 309	4 714	17 573
FR	3 419 109	:	50 450	:	48 108	21 817	56 245	77 192	:	13 512
HR	78 051	4 196	:	:	604	1 268	1 020	640	166	499
IT	2 833 573	143 760	39 089	104 671	22 148	19 384	47 023	36 359	6 273	12 573
CY	26 579	:	:	:	:	829	986	119	66	116
LV	37 916	2 157	:	:	476	115	321	998	51	196
LT	51 959	2 102	400	1 702	533	112	336	873	:	196
LU	114 646	:	:	:	:	253	897	:	295	:
HU	247 902	:	2 388	:	:	723	2 081	5 388	464	775
MT	:	:	:	:	:	:	:	:	:	:
NL	1 263 891	66 482	:	:	13 855	4 963	:	23 175	5 562	7 216
AT	573 869	42 321	13 967	28 354	5 976	7 124	7 484	14 274	3 403	4 061
PL	777 637	28	4 774	23	4	1 982	3 444	14 865	890	2 096
PT	335 045	:	7 854	:	:	2 336	7 410	5 544	1 217	2 107
RO	211 980	6 551	1 879	4 672	1 325	893	1 381	2 104	243	606
SI	76 488	:	1 107	:	:	553	899	674	46	417
SK	145 833	4 821	:	:	280	296	950	2 599	236	460
FI	352 135	20 854	:	:	5 856	1 318	3 962	7 570	654	1 494
SE	662 907	:	:	40 225	:	3 488	7 260	27 806	732	5 822
UK	3 302 278	214 322	80 780	133 542	41 227	20 575	50 429	52 369	11 200	38 521
NO	562 894	:	9 565	:	:	2 718	3 954	13 950	628	4 192
CH	:	:	:	:	:	:	:	:	:	:

Note: Due to unreliable data at country level and rounding, deviations can occur between total and subtotals.
([1]) NACE sections: B-N_S95_X_K - Total business economy; repair of computers, personal and household goods; except financial and insurance activities.
([2]) NACE classes: H4910, H4932, H4939, H5010, H5030, H5110, I5510, I5520, I5530, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721, N7911, N7912 and N7990.
([3]) NACE clases: H5110, I5510, I5520, I5530, N7911 and N7912.
([4]) NACE classes: H4910, H4932, H4939, H5010, H5030, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721 and N7990.
([5]) NACE classes: H4910, H4932, H4939, H5010, H5030 and H5110.
([6]) NACE classes: I5510, I5520, I5530 and I5590.
([7]) NACE classes: I5610, I5629 and I5630.
([8]) NACE classes: L6810, L6820, L6831 and L6832.
([9]) NACE classes: N7711, N7712 and N7721.
([10]) NACE classes: N7911, N7912 and N7990.
":" : Aggregate not available due to one or more unreliable components at NACE 4 digit level.

Table 6: Turnover or gross premiums written, 2010 (in million EUR) - Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

| | Total non-financial business economy(1) | Tourism industries, of which: | | Tourism industries, of which: | | | | | |
		Tourism industries(2)	Mainly tourism(3)	Partially tourism(4)	Transport related(5)	Accommodation related(6)	Food related(7)	Real estate(8)	Car and other rental(9)	Travel agencies and Tour operators(10)
EU28	5 955 387	557 860	108 738	447 338	89 096	64 012	125 172	225 183	30 240	22 274
BE	176 405	12 296	:	:	1 444	926	3 007	4 575	1 777	566
BG	16 554	:	301	:	:	229	240	508	34	32
CZ	82 697	5 597	:	:	858	450	:	2 809	275	210
DK	114 878	:	1 461	:	:	691	1 636	7 366	190	301
DE	1 297 866	110 453	19 497	90 956	11 698	10 447	18 134	59 728	4 210	6 234
EE	7 247	561	93	468	:	61	85	327	:	26
IE	81 431	6 012	2 345	3 666	:	985	1 891	807	:	221
EL	:	:	:	:	:	:	:	:	:	:
ES	476 509	48 574	11 838	36 736	7 576	8 062	:	12 393	2 495	1 879
FR	871 787	:	15 307	:	20 563	8 865	24 734	36 425	:	1 849
HR	21 474	1 785	:	:	257	680	352	359	57	79
IT	670 216	58 675	11 901	46 774	9 235	9 154	17 117	18 478	3 254	1 437
CY	8 789	:	:	:	:	463	454	87	41	79
LV	7 715	730	:	:	47	53	93	501	18	18
LT	9 408	734	73	661	208	43	97	345	:	22
LU	17 986	:	:	:	:	128	417	:	160	:
HU	46 158	:	304	:	:	272	449	1 773	237	57
MT	:	:	:	:	:	:	:	:	:	:
NL	298 021	29 272	:	:	5 367	2 080	0	12 454	2 844	1 551
AT	151 348	18 457	4 440	14 018	2 151	3 621	3 367	7 550	1 366	401
PL	166 138	9	1 460	8	2	894	1 000	5 138	477	211
PT	77 866	:	2 258	:	:	1 061	2 811	1 673	700	233
RO	46 478	:	433	:	:	344	354	1 167	179	63
SI	17 625	:	286	:	:	246	304	271	16	42
SK	31 470	4 821	:	:	280	123	274	1 145	128	61
FI	84 621	8 361	:	:	2 123	411	1 455	3 923	253	196
SE	184 834	:	:	18 181	:	1 400	0	13 217	339	624
UK	925 088	87 385	20 607	66 777	14 325	9 981	20 043	32 166	5 156	5 715
NO	181 403	:	2 296	:	:	1 108	1 659	8 267	332	376
CH	250 679	:	:	:	:	:	:	:	:	:

Note: Due to unreliable data at country level and rounding, deviations can occur between total and subtotals.
(1) NACE sections: B-N_S95_X_K - Total business economy; repair of computers, personal and household goods; except financial and insurance activities.
(2) NACE classes: H4910, H4932, H4939, H5010, H5030, H5110, I5510, I5520, I5530, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721, N7911, N7912 and N7990.
(3) NACE clases: H5110, I5510, I5520, I5530, N7911 and N7912.
(4) NACE classes: H4910, H4932, H4939, H5010, H5030, I5590, I5610, I5629, I5630, L6810, L6820, L6831, L6832, N7711, N7712, N7721 and N7990.
(5) NACE classes: H4910, H4932, H4939, H5010, H5030 and H5110.
(6) NACE classes: I5510, I5520, I5530 and I5590.
(7) NACE classes: I5610, I5629 and I5630.
(8) NACE classes: L6810, L6820, L6831 and L6832.
(9) NACE classes: N7711, N7712 and N7721.
(10) NACE classes: N7911, N7912 and N7990.
":" : Aggregate not available due to one or more unreliable components at NACE 4 digit level.

Table 7: Value added at factor cost, 2010 (in million EUR) - Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

Infra-annual analysis

The above sections were based on structural business statistics (SBS). While SBS is a rich and comprehensive source of information on European businesses, one of its limitations is the one year reference period of the data. Compared to other branches of the economy, the tourism sector has a relatively strong seasonal component, hence the need for infra-annual data to complete the analysis. Short-term business statistics provide monthly and quarterly indices for a subset of tourism industries.
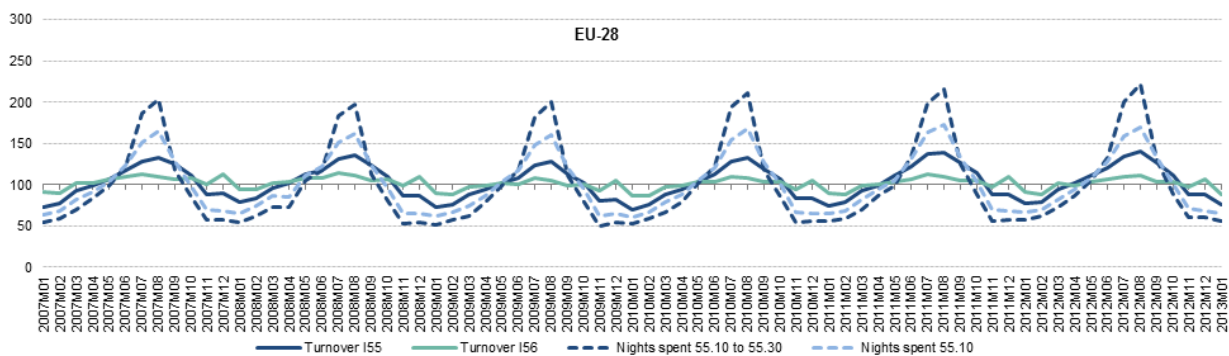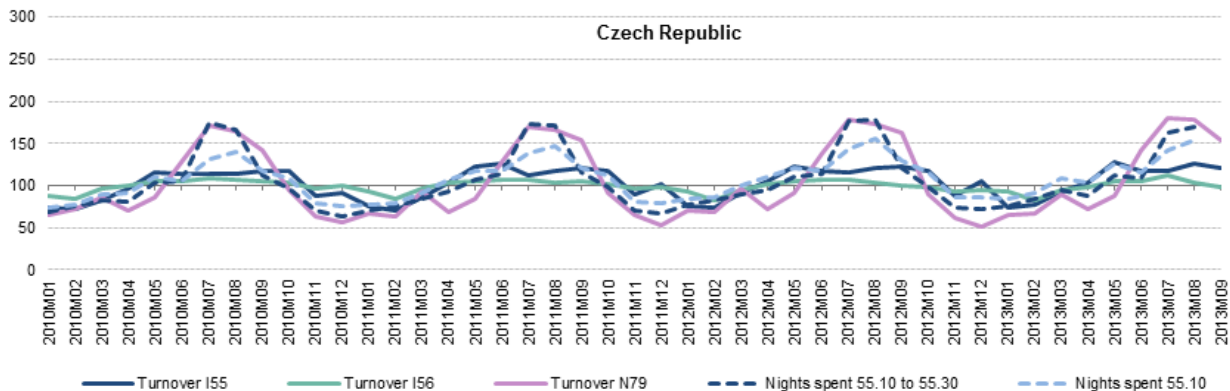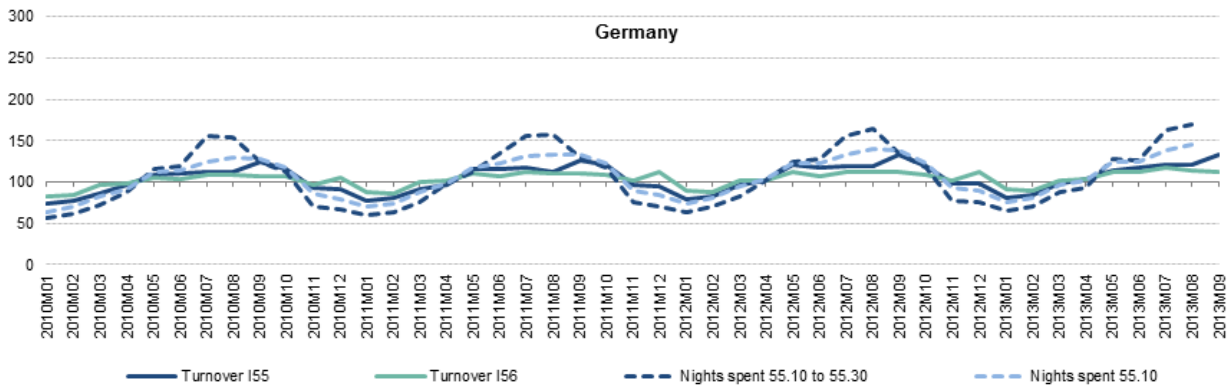
Figure 2: Monthly working day adjusted turnover for NACE divisions I55 and I56 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), EU-28 - Source: Eurostat (sts_setu_m), (tour_occ_nim)

Figure 2 shows for the EU-28, for the period January 2007 to January 2013, both the monthly evolution of the working days adjusted turnover (2010 index = 100) for accommodation and for food and beverage services, and the monthly evolution of nights spent in hotels and similar establishments and in all tourist accommodation establishments. Figures 3 to 12 show, for the period January 2010 to September 2013, the country detail for ten countries where monthly data (even fragmented) is available for the two industries mentioned above as well as for travel agencies and tour operators.
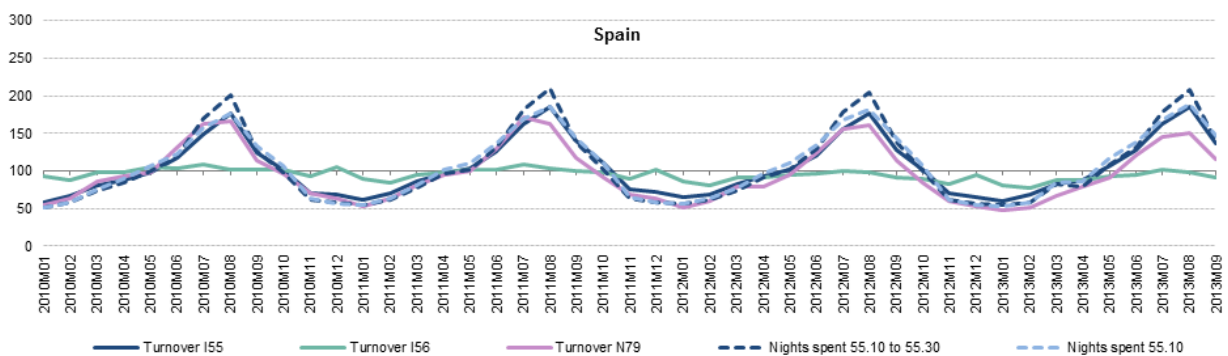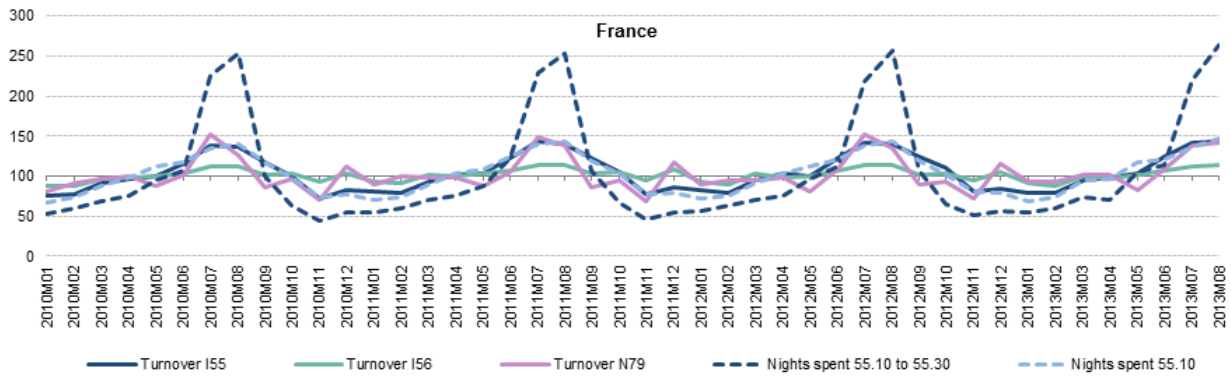

Figure 3: Monthly working day adjusted turnover for NACE divisions I55, I56 and N79 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), Czech Republic - Source: Eurostat (sts_setu_m), (tour_occ_nim)

Figure 4: Monthly working day adjusted turnover for NACE divisions I55 and I56 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), Germany - Source: Eurostat (sts_setu_m), (tour_occ_nim)
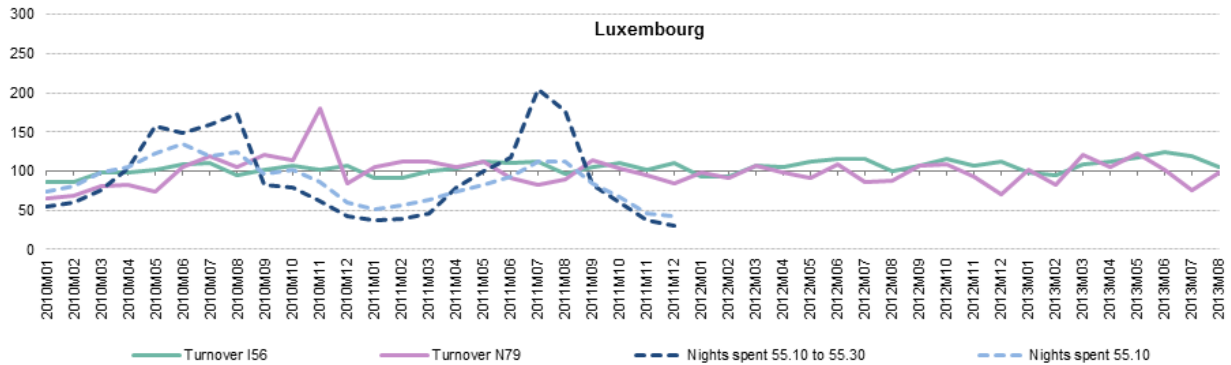
For the EU-28 aggregate and in most of the countries for which data is available, the seasonality of the turnover in accommodation correlates well with the physical indicator of the number of overnight stays. The accommodation sector showed the most pronounced seasonal pattern while for travel agencies and tour operators and especially food and beverage services, turnover was less concentrated in the peak (summer) months. This observation can be linked to the methodological issue mentioned in the introduction and under the data sources and availability chapter, namely that this analysis covers all services performed by enterprises in the tourism industries, regardless of whether the final consumer was a tourist; this remark is obviously more relevant for food and beverage services than for accommodation services.

Figure 5: Monthly working day adjusted turnover for NACE divisions I55, I56 and N79 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), Spain - Source: Eurostat (sts_setu_m), (tour_occ_nim)
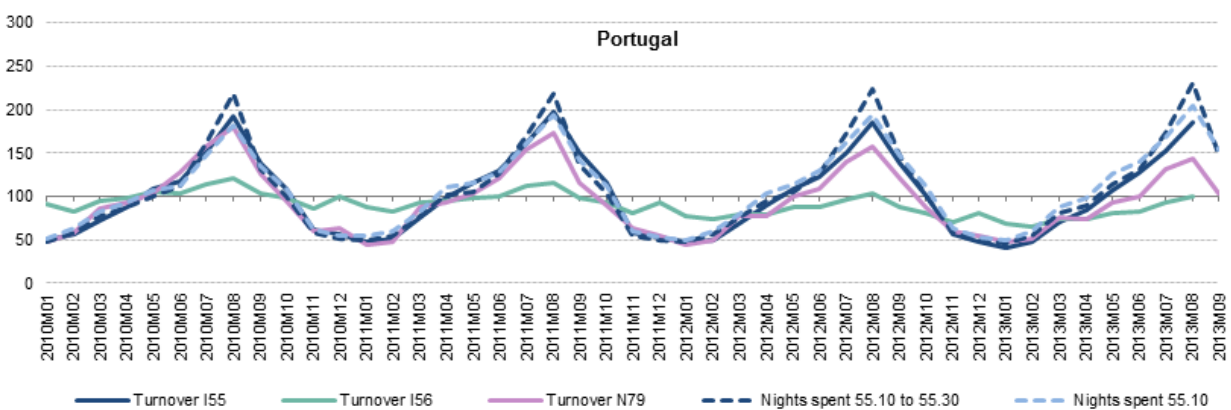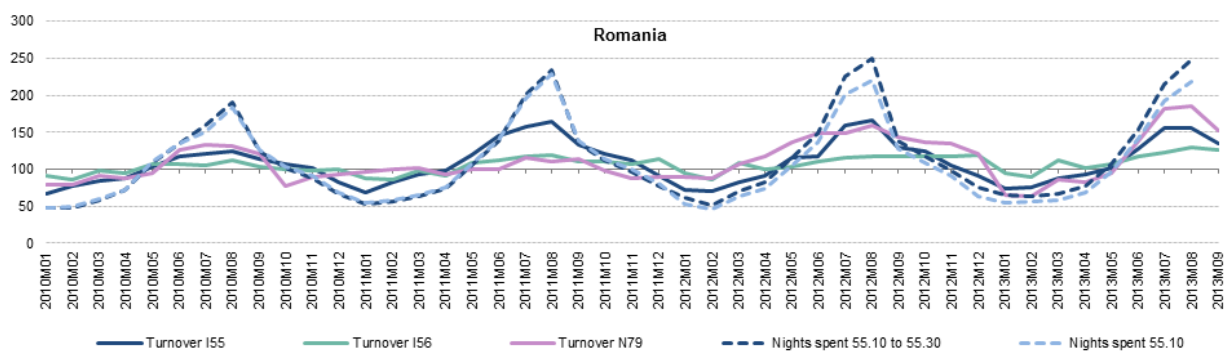
Figure 6: Monthly working day adjusted turnover for NACE divisions I55, I56 and N79 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), France - Source: Eurostat (sts_setu_m), (tour_occ_nim)
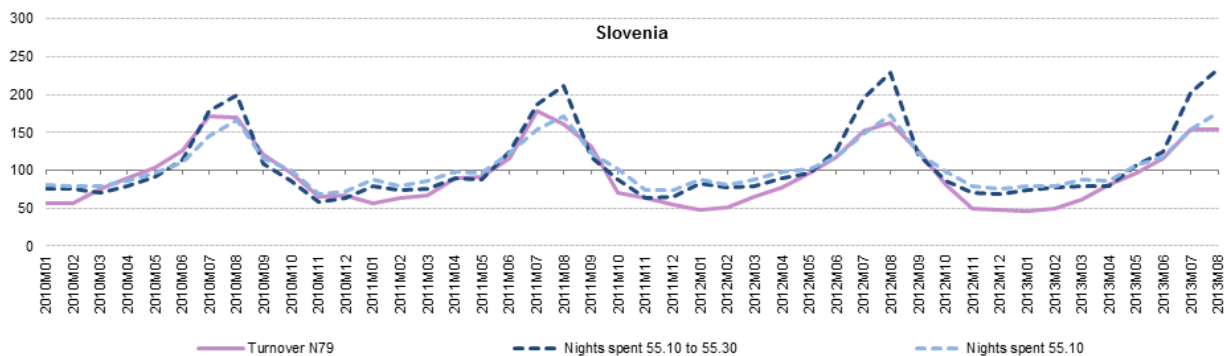

Figure 7: Monthly working day adjusted turnover for NACE divisions I56 and N79 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), Luxembourg - Source: Eurostat (sts_setu_m), (tour_occ_nim)

Figure 8: Monthly gross turnover for NACE divisions I55, I56 and N79 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), Portugal - Source: Eurostat (sts_setu_m), (tour_occ_nim)
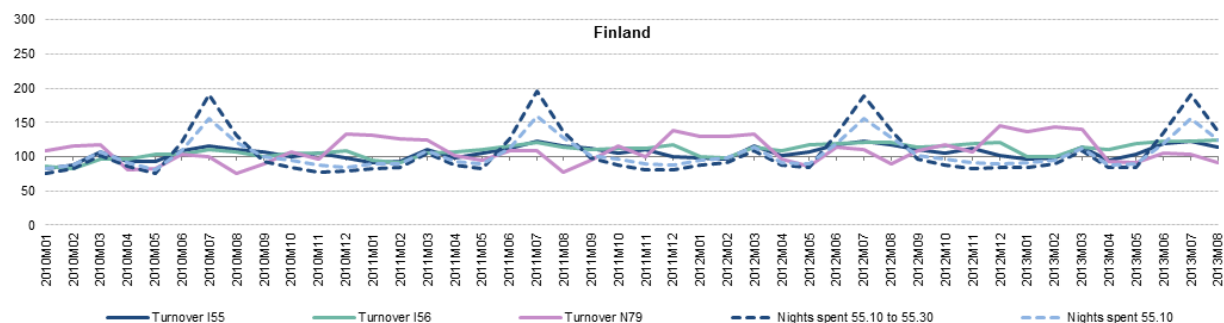
Figure 9: Monthly working day adjusted turnover for NACE divisions I55, I56 and N79 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), Romania - Source: Eurostat (sts_setu_m), (tour_occ_nim)

Figure 10: Monthly working day adjusted turnover for NACE division N79 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), Slovenia - Source: Eurostat (sts_setu_m), (tour_occ_nim)
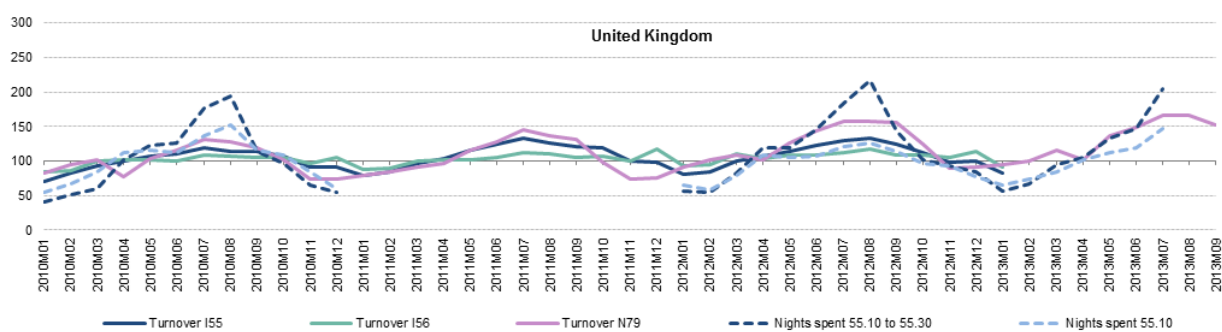

Figure 11: Monthly working day adjusted turnover for NACE divisions I55, I56 and N79 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), Finland - Source: Eurostat (sts_setu_m), (tour_occ_nim)

Figure 12: Monthly working day adjusted turnover for NACE divisions I55, I56 and N79 and monthly nights spent at tourist accommodation establishments (NACE classes 55.10 to 55.30) and hotels and similar accommodation (NACE class 55.10) (index=average for 2010), United Kingdom - Source: Eurostat (sts_setu_m), (tour_occ_nim)

Data sources and availability

Structural business statistics (SBS) are among the key pillars of business statistics in the European Statistical System (ESS) and describe the structure, main characteristics and performance of economic activities across the European Union. Data is available at a detailed level of economic activities, which allows to identify and select industries that are part of the tourism sector. The International Recommendations for Tourism Statistics 2008 include in the tourism sector (also: 'tourism industries' or 'tourism characteristic activities') ten internationally comparable activities and two country-specific activities – this article focuses on the former. An overview of these activities (and the corresponding codes in the international classifications ISIC and NACE) is given in Table 1. Except for those in the area of culture, sports and recreation, these activities are covered by SBS.

It should be pointed out that this approach cannot distinguish between services provided to tourists and to non-tourists – typical examples include restaurants catering to tourists but also to locals and railway passenger transport used by tourists as well as by commuters. An assessment of the so-called tourism ratio for each of these industries is outside the scope of this article. Considering the total turnover or employment will give an overestimation of the true economic importance of tourism for these industries (but on the other hand, tourism also contributes to other industries not listed in Table 1). Notwithstanding these shortcomings, SBS data allows for an economic analysis of the sector which is not possible using only the traditional tourism statistics.A second relevant source within existing business statistics is short-term business statistics (STS). STS can fill the gap of information on turnover or prices where monthly accommodation statistics are limited to evolutions in flows of tourists. As a trade-off with its strong timeliness, STS is available with a lower granularity of activities for services; as a consequence the further analysis of monthly economic indicators focuses on accommodation (NACE I55), food and beverage service activities (NACE I56) and travel agency, tour operator reservation service and related activities (NACE N79).

Subsequent versions of this publication will be enriched with additional variables (e.g. full-time equivalent employment) and breakdowns (e.g. size class) or with data from other sources that were not considered for this article (e.g. Labour Force Survey and Balance of Payments statistics).

Context

Tourism statistics traditionally focus on the accommodation sector on the one hand and the demand side (from a household perspective) on the other hand. The available tourism statistics relate mainly to physical flows: arrivals or nights spent at tourist accommodation establishments or trips made by residents of a country.

This article presents economic data extracted from other areas of official statistics, in particular structural business statistics (SBS) and short-term business statistics (STS) , in order to provide users with a better economic analysis of this sector that is an important motor for many countries' economies and labour market.

Further Eurostat information

Database

- Tourism (tour)

Dedicated section

- Tourism statistics

- Structural business statistics (SBS)

- Short term business statistics (STS)

Methodology / Metadata

- Occupancy in collective accommodation establishments: domestic and inbound tourism (ESMS metadata file - tour_occ_esms)

- Methodological manual for tourism statistics

Other information

- Regulation 692/2011 of the European Parliament and of the Council of 6 July 2011 concerning European statistics on tourism and repealing Council Directive 95/57/EC.
  - Commission Implementing Regulation 1051/2011 of 20 October 2011 implementing Regulation 692/2011 concerning European statistics on tourism, as regards the structure of the quality reports and the transmission of the data.

Notes

This article is available on Statistics Explained at http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Tourism_industries_-_economic_analysis

Manuscript completed on 18.12.2013 - Data from November 2013