Tourism industries - economic analysis

Statistics Explained

Data extracted in March 2023 Planned article update: 29 April 2024

- " In 2020, almost one in ten enterprises in the EU non-financial business economy belonged to the tourism industries, employing 10.9 million persons."
- "Three out of four enterprises in tourism industries in the EU operated in accommodation (15 %) or food and beverage serving activities (60 %) in 2020. "
- " In 2020, more than half (54 %) of the enterprises in the tourism industries in the EU were located in Italy, France, Spain and Germany."
- " After a sharp drop of the turnover of tourism industries in the second quarter of 2020, it reached again the pre-pandemic levels from April 2022 onwards"

This article presents the most recent available statistics on the tourism industries in the European Union (EU). While tourism statistics focus on either the accommodation sector (data collected from accommodation service providers) or the demand side (data collected from households), and relate mainly to physical flows (arrivals or nights spent at tourist accommodation or trips made by residents of a country), the analysis in this article 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 analysis of the tourism sector or tourism ecosystem can be drawn, which is an important motor for many countries' economies and labour markets. "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 a subset of these that has relevance for the EU (the other activities proved to be of limited relevance for European tourism or have limited coverage in SBS). The reader is strongly encouraged to consult the "Data sources" section before using the presented data, in order to avoid overestimating or underestimating the economic importance of tourism for some industries.

Key economic indicators

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 2020, almost one in ten enterprises in the EU non-financial business economy belonged to the tourism industries (see Table 1, Table 2). These 2.3 million enterprises employed 10.9 million persons, accounting for 8.5 % of the persons employed in the non-financial business economy and 20.6 % of persons employed in the services sector.

Key economic indicators for the tourism industries, EU, 2020

	NACE Rev.2	Number of enterprises	Turnover (million EUR)	Value added at factor cost (million EUR)	Number of persons employed
Total non-financial business economy (1)		23 382 451	24 774 210	6 496 219	127 619 910
Total services (2)		11 835 512	5 503 229	2 440 975	52 853 014
Total tourism industries (3)		2 299 931	613 474	236 283	10 890 359
Tourism industries (mainly tourism) (4)		415 723	179 371	45 369	2 588 529
Tourism industries (partially tourism) (5)		1 884 208	434 103	190 914	8 301 830
Transport related (total)		407 742	149 829	49 034	1 892 795
Land transport		393 077	89 482	43 600	1 512 519
Passenger rail transport, interurban	H4910	221	44 042	18 771	454 989
Taxi operation	H4932	336 414	14 876	7 898	550 602
Other passenger land transport n.e.c.	H4939	56 442	30 564	16 932	506 928
Water transport		10 093	13 047	2 844	99 358
Sea and coastal passenger water transport	H5010	6 000	11 949	2 415	81 855
Inland passenger water transport	H5030	4 093	1 097	429	17 503
Passenger air transport	H5110	4 572	47 300	2 589	280 918
Accommodation (scope of Reg 692/2011)		342 069	95 177	38 411	1 994 902
Hotels and similar accommodation	15510	143 202	72 217	30 161	1 571 130
Holiday and other short-stay accommodation	15520	184 067	17 000	5 470	368 927
Camping grounds, recreational vehicle parks and trailer parks	15530	14 800	5 960	2 780	54 845
Food and beverage (total)		1 391 131	230 726	90 044	6 414 364
Restaurants and mobile food service activities	15610	895 911	188 179	75 609	4 876 809
Beverage serving activities	15630	495 220	42 546	14 435	1 537 555
Car and other rental (total)		58 040	96 419	52 918	202 589
Renting and leasing of cars and trucks	N7710	42 063	94 000	52 000	173 184
Renting and leasing of recreational and sports goods	N7721	16 040	2 419	918	29 405
Travel agency, tour operator reservation service and related activitie	s (total)	100 948	41 324	5 876	386 000
Travel agency and tour operator activities	N7910	69 082	36 894	4 368	312 709
Other reservation service and related activities	N7990	31 867	4 430	1 508	73 000

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

Source: Eurostat (online data code: sbs_na_sca_r2, sbs_na_1a_se_r2)



Table 1: Key economic indicators for the tourism industries, EU, 2020 Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

⁽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, S95.

⁽³⁾ NACE classes: H491, H4932, H4939, H501, H503, H511, I551, I552, I553, I561, I563, N771, N7721 and division N79.

⁽⁴⁾ NACE classes: H511, I551, I552, I553 and N791.

⁽⁵⁾ NACE classes: H491, H4932, H4939, H501, H503, I561, I563, N771, N7721 and N799.

Key economic indicators for the tourism industries, percentages, EU, 2020

	NACE Rev.2	Number of enterprises	Turnover	Value added at factor cost	Number of persons employed
Total tourism industries as share of total non-financial business economy(1)		9.8%	2.5%	3.6%	8.5%
Total tourism industries as share of total Services(2)		19.4%	11.1%	9.7%	20.6%
Total tourism industries(3), of which:		100.0%	100.0%	100.0%	100.0%
Tourism industries (mainly tourism)(4)		18.1%	29.2%	19.2%	23.8%
Tourism industries (partially tourism)(5)		81.9%	70.8%	80.8%	76.2%
Total tourism industries, of which:		100.0%	100.0%	100.0%	100.0%
Transport related (total)		17.7%	24.4%	20.8%	17.4%
Land transport		17.1%	14.6%	18.5%	13.9%
Passenger rail transport, interurban	H4910	0.0%	7.2%	7.9%	4.2%
Taxi operation	H4932	14.6%	2.4%	3.3%	5.1%
Other passenger land transport n.e.c.	H4939	2.5%	5.0%	7.2%	4.7%
Water transport		0.4%	2.1%	1.2%	0.9%
Sea and coastal passenger water transport	H5010	0.3%	1.9%	1.0%	0.8%
Inland passenger water transport	H5030	0.2%	0.2%	0.2%	0.2%
Air transport	H5110	0.2%	7.7%	1.1%	2.6%
Accommodation (scope of Reg 692/2011)		14.9%	15.5%	16.3%	18.3%
Hotels and similar accommodation	15510	6.2%	11.8%	12.8%	14.4%
Holiday and other short-stay accommodation	15520	8.0%	2.8%	2.3%	3.4%
Camping grounds, recreational vehicle parks and trailer parks	15530	0.6%	1.0%	1.2%	0.5%
Food and beverage (total)		60.49%	37.6%	38.1%	58.9%
Restaurants and mobile food service activities	15610	39.0%	30.7%	32.0%	44.8%
Beverage serving activities	15630	21.5%	6.9%	6.1%	14.1%
Car and other rental (total)		2.5%	15.7%	22.4%	1.9%
Renting and leasing of cars and trucks	N7710	1.8%	15.3%	22.0%	1.6%
Renting and leasing of recreational and sports goods	N7721	0.7%	0.4%	0.4%	0.3%
Travel agency, tour operator reservation service and related activities (total)	4.4%	6.7%	2.5%	3.5%
Travel agency and tour operator activities	N7910	3.0%	6.0%	1.8%	2.9%
Other reservation service and related activities	N7990	1.4%	0.7%	0.6%	0.7%

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

Source: Eurostat (online data code: sbs_na_sca_r2, sbs_na_1a_se_r2)



Table 2: Key economic indicators for the tourism industries, percentages, EU, 2020 Source: Eurostat (sbs na sca r2), (sbs na 1a se r2)

The tourism industries' shares of total turnover and value added at factor cost were relatively lower, with the tourism industries accounting for 2.5 % of the turnover and 3.6 % 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 the level of part-time employment in many tourism industries.

As explained in the "Data sources" section, tourism industries do not provide services only to tourists. Their employment, turnover, etc., is also related to services provided to non-tourists. In Table 1 and Table 2, the subdivision "mainly tourism" and "partially tourism" takes this into account. For instance, 2.6 million persons are employed in "mainly tourism" industries (passenger air transport, accommodation services and travel agencies and tour operators) that are assumed to serve predominantly tourists, while 8.3 million persons are employed in "partially tourism" industries where the customers are likely to be a mix of tourists and non-tourists (e.g. restaurants).

Figure 1 presents the growth of the sectors from 2012 to 2020. In the period up to 2019, tourism industries (mainly and partially) showed a much stronger growth than the total economy for all indicators concerned. But in 2020, the impact of the Covid-19 pandemic caused dramatic drops of the turnover and value added of the tourism industries (-41.0 % and -40.1 % respectively, comparing 2020 with 2019). The number of persons employed in the tourism industries and the number of enterprises dropped less strongly, but still recorded levels that were respectively 2.8 % and 13.5 % lower in 2020 compared with 2019) (see Table 3).

⁽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. S95.

⁽³⁾ NACE classes: H491, H4932, H4939, H501, H503, H511, I551, I552, I553, I561, I563, N771, N7721 and division N79.

⁽⁴⁾ NACE classes: H511, I551, I552, I553 and N791.

⁽⁵⁾ NACE classes: H491, H4932, H4939, H501, H503, I561, I563, N771, N7721 and N799.

Evolution of indicators for different sectors of the economy, EU, 2012-2020_rev (index 2012=100)

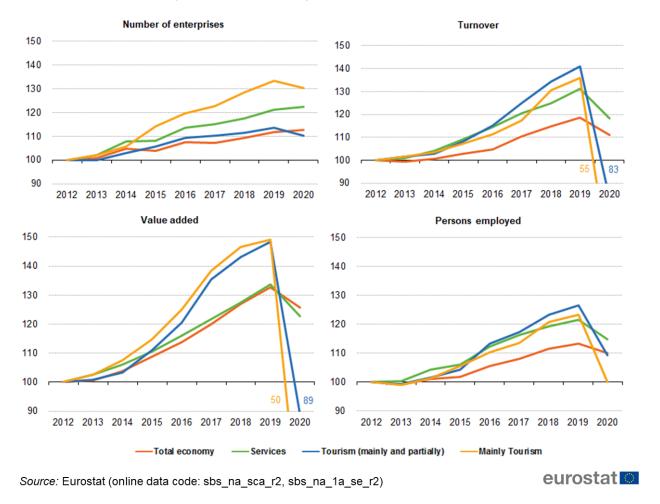


Figure 1: Evolution of indicators for different sectors of the economy, EU, 2012-2020 (index 2012=100) Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

	NACE Rev.2	Number of enterprises	Turnover (million EUR)	Value added at factor cost (million EUR)	Number of persons employed
Total non-financial business economy (¹)		0.9%	-6.5%	-5.2%	-3.0%
Total services (2)		1.0%	-9.8%	-8.2%	-5.6%
Total tourism industries (3)		-2.8%	-41.0%	-40.1%	-13.5%
Tourism industries (mainly tourism) (4)		-2.4%	-59.6%	-66.3%	-18.8%
Tourism industries (partially tourism) (5)		-2.9%	-27.2%	-26.6%	-11.7%
Transport related (total)		-2.2%	-43.2%	-52.3%	-7.4%
Land transport		-2.4%	-26.4%	-34.6%	-7.0%
Passenger rail transport, interurban	H4910	-7.1%	-22.1%	-42.0%	0.5%
Taxi operation	H4932	-2.5%	-35.4%	-37.0%	-12.8%
Other passenger land transport n.e.c.	H4939	-1.4%	-27.1%	-22.2%	-6.3%
Water transport		3.2%	-44.4%	-68.2%	-19.9%
Sea and coastal passenger water transport	H5010	5.7%	-44.6%	-69.5%	-19.0%
Inland passenger water transport	H5030	-0.2%	-42.2%	-58.0%	-24.2%
Passenger air transport	H5110	0.9%	-60.2%	-90.5%	-4.6%
Accommodation (scope of Reg 692/2011)		-1.6%	-49.0%	-56.2%	-20.6%
Hotels and similar accommodation	15510	-2.4%	-53.1%	-59.4%	-23.1%
Holiday and other short-stay accommodation	15520	-1.1%	-32.2%	-43.9%	-7.8%
Camping grounds, recreational vehicle parks and trailer parks	15530	-0.7%	-20.1%	-21.6%	-22.0%
Food and beverage (total)		-2.9%	-33.3%	-34.9%	-12.7%
Restaurants and mobile food service activities	15610	-1.4%	-31.8%	-33.1%	-11.8%
Beverage serving activities	15630	-5.5%	-39.2%	-43.1%	-15.6%
Car and other rental (total)		0.4%	0.3%	23.5%	-5.7%
Renting and leasing of cars and trucks	N7710	-0.2%	1.1%	24.3%	-3.8%
Renting and leasing of recreational and sports goods	N7721	1.4%	-22.8%	-11.7%	-15.6%
Travel agency, tour operator reservation service and related activitie	s (total)	-10.2%	-72.1%	-74.5%	-17.9%
Travel agency and tour operator activities	N7910	-6.4%	-73.3%	-78.2%	-17.7%
Other reservation service and related activities	N7990	-17.5%	-54.2%	-51.0%	-18.9%

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

Source: Eurostat (online data code: sbs_na_sca_r2, sbs_na_1a_se_r2)



Table 3: Change rate of indicators for different sectors of the economy, 2020 compared with 2019 Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

Analysis by subsectors

Three out of four enterprises in the tourism industries operated in accommodation (NACE I55) or food and beverage serving activities (NACE I56): 15 % and 60 %, respectively (see Table 1, Table 2, Figure 2). Looking at the number of persons employed, the weight of these activities was 77 % persons employed in the tourism industries. However, in terms of turnover and value added, their share was much lower (53 % and 54 %, respectively).

⁽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, S95.

⁽³⁾ NACE classes: H491, H4932, H4939, H501, H503, H511, I551, I552, I553, I561, I563, N771, N7721 and division N79.

⁽⁴⁾ NACE classes: H511, I551, I552, I553 and N791.

⁽⁵⁾ NACE classes: H491, H4932, H4939, H501, H503, I561, I563, N771, N7721 and N799.

Number of enterprises, turnover, value added at factor cost and number of persons employed, EU, 2020 (%)

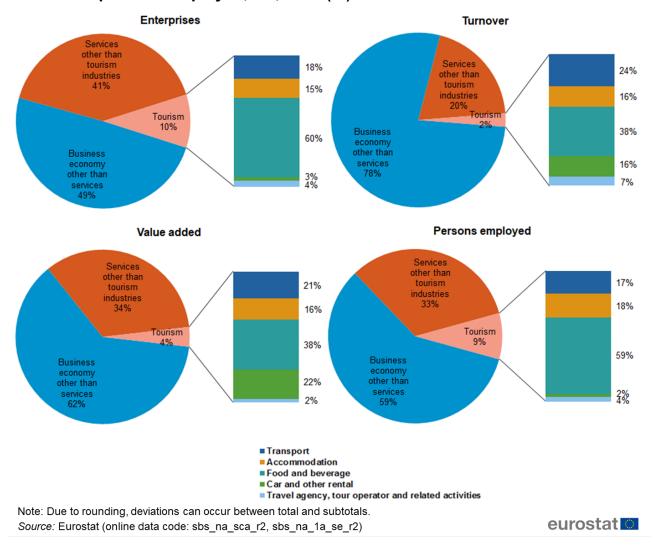


Figure 2: Number of enterprises, turnover, value added at factor cost and number of persons employed, EU, 2020 (%) Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

The turnover of passenger transport related industries (parts of NACE H49, H50, H51) represented 24 % of the turnover for all tourism industries: 32 % of this share came from the subsector of passenger air transport (NACE H5110).

Travel agencies and tour operators (NACE N7910) and other related activities (NACE N7990) recorded a turnover of € 41 billion in 2020, a decrease by € 107 billion (-72 %) compared with 2019. These activities represented 7 % of the turnover in tourism industries, compared with a 4 % share in number of enterprises and employment, and a 2 % share in value added at factor cost.

Geographical analysis

More than half (54 %) of the 2.3 million enterprises in the tourism industries in the EU in 2020, were located in four Member States: 368

000 in Italy, 349 000 in France, 291 000 in Spain (not including taxi operation) and 238 000 in Germany (see Table 4).

Number of enterprises, 2020

	Total non- financial business economy(¹)	Tourism industries (total)(²)	Tourism industries (mainly tourism)(³)	Tourism industries (partially tourism)(⁴)	Transport (total)(°)	Accommodation (scope of Reg 692/2011)(°)	Food and beverage (total)(⁷)	Car and other rental (total)(°)	Travel agency, tour operators and other reservation services (total)(3)
EU	23 382 451	2 299 931	415 723	1 884 208	407 742	342 069	1 391 131	58 040	100 948
Belgium	685 540	52 819	5 518	47 301	3 971	4 125	41 895	1 037	1 791
Bulgaria	341 227	32 927	6 097	26 830	4 816	4 499	19 594	2 212	1 806
Czechia	1 068 446	67 945	13 952	53 993	4 645	8 862	46 912	1 285	6 241
Denmark	229 246	17 822	2 096	15 726	3 587	1 588	11 381	686	580
Germany	2 485 804	238 306	51 010	187 296	24 663	41 891	157 056	5 000	9 696
Estonia	85 480	4 796	1 262	3 534	803	954	2 013	579	447
Ireland	271 692	:	3 909	:	:	3 217	14 408	130	1 171
Greece	711 171	141 248	31 203	110 045	34 529	27 706	72 614	2 704	3 695
Spain	2 683 786	291 331	36 698	254 633	4 508	27 333	239 358	5 449	14 682
France	3 084 048	349 188	60 420	288 768	70 658	55 302	202 052	11 742	9 434
Croatia	180 537	29 665	4 905	24 760	5 356	3 133	16 945	1 497	2 734
Italy	3 640 489	368 289	63 258	305 031	29 531	53 260	265 923	5 552	14 023
Cyprus	59 076	7 349	1 004	6 345	1 253	653	4 649	324	470
Latvia	111 153	6 798	1 728	5 070	1 268	1 082	2 619	986	843
Lithuania	228 299	20 186	4 490	15 696	10 149	3 934	3 500	1 532	1 071
Luxembourg	35 855	3 158	350	2 808	267	266	2 370	162	93
Hungary	668 796	42 967	5 383	37 584	9 908	4 194	24 069	2 419	2 377
Malta	30 950	:	:	2 815	882	:	1 671	186	274
Netherlands	1 362 947	75 789	15 066	60 723	14 985	9 929	41 399	2 700	6 776
Austria	330 625	50 660	16 615	34 045	5 318	15 486	27 659	784	1 413
Poland	2 066 209	118 013	23 726	94 287	43 079	17 304	45 116	5 259	7 255
Portugal	916 292	135 040	40 920	94 120	18 649	38 116	72 626	1 348	4 301
Romania	541 144	46 769	7 916	38 853	16 349	5 548	20 285	1 868	2 719
Slovenia	150 261	14 287	4 986	9 301	1 191	4 334	7 384	373	1 005
Slovakia	518 497	24 711	3 703	21 008	5 152	2 474	14 885	805	1 395
Finland	236 038	20 251	1 669	18 582	8 132	1 233	9 056	439	1 391
Sweden	658 843	43 635	7 212	36 423	10 415	5 217	23 692	1 046	3 265
Iceland	30 023	4 043	1 723	2 320	918	1 171	764	126	1 064
Norway	304 191	21 072	3 803	17 269	6 763	2 979	7 969	844	2 517
Switzerland	144 048		4 033			3 264	13 550		905

- (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: H491, H4932, H4939, H501, H503, H511, I551, I552, I553, I561, I563, N771, N7721 and division N79. EU aggregate underestimated, not including H511 for IE. BG, EL: excluding H4910, ES: excluding H4932, LU: excluding H501 and H503, SK: excluding H4910 and H501
- (3) NACE classes: H511, I551, I552, I553 and N791. Country data might be underestimated, see footnote (2).
- (4) NACE classes: H491, H4932, H4939, H501, H503, I561, I563, N771, N7721 and N799. Country data might be underestimated, see footnote (2).
- (5) NACE classes: H491, H4932, H4939, H501, H503 and H511. Country data might be underestimated, see footnote (2).
- (6) NACE classes: I551, I552 and I553.
- (*) NACE classes: I561 and I563.
- (8) NACE classes: N771 and N7721. (9) NACE division N79.
- ":" = Aggregate not available and not possible to estimate.

Source: Eurostat (online data code: sbs_na_sca_r2, sbs_na_1a_se_r2)



Table 4: Number of enterprises, 2020 Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

Looking at the available EU Member States' data, in terms of employment (see Table 5), Germany (not including passenger inter-urban rail transport) was on top with 2.0 million persons employed in the tourism industries, followed by Italy (1.5 million) and Spain (1.4 million, not including taxi operation) (note that there is no data available for France).

The highest share of employment in the tourism industries was observed in Greece (24 % of the total non-financial business economy of the country), followed by Cyprus (17 %) (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 (total)(²)	Tourism industries (mainly tourism)(3)	Tourism industries (partially tourism)(4)	Transport (total)(°)	Accommodatio n (scope of Reg 692/2011)(6)	Food and beverage (total)(⁷)	Car and other rental (total)(*)	Travel agency, tour operators and other reservation services (total)(9)
EU	127 619 910	10 890 359	2 588 529	8 301 830	1 892 795	1 994 902	6 414 364	202 589	386 000
Belgium	2 949 203	205 684	34 766	170 918	51 493	22 390	119 080	4 751	7 970
Bulgaria	1 917 171	136 376	37 081	99 295	16 326	30 937	81 237	3 124	4 752
Czechia	3 710 274	197 187	:	:	29 795	30 284	123 032	2 440	11 636
Denmark	1 769 373	132 578	24 871	107 707	21 438	17 907	86 884	2 359	3 990
Germany	29 430 780	1 975 345	574 899	1 400 446	231 560	446 910	1 176 338	38 759	81 778
Estonia	436 161	:	6 731	:	:	5 545	15 121	:	1 599
Ireland	1 531 349	:	:	:	:	44 573	102 107	:	5 489
Greece	2 510 330	603 990	132 669	471 321	59 970	115 410	407 212	7 106	14 292
Spain	12 510 252	1 415 591	345 199	1 070 392	102 270	267 080	964 902	23 959	57 379
France	16 235 541	:	283 704	:	:	199 925	738 992	38 747	37 448
Croatia	1 087 397	126 889	38 197	88 692	19 225	31 828	65 649	3 676	6 511
Italy	14 914 494	1 520 203	294 210	1 225 993	172 117	237 118	1 047 307	19 180	44 481
Cyprus	275 011	46 564	18 648	27 916	2 197	16 985	24 796	921	1 665
Latvia	619 111	40 349	9 177	31 172	6 166	6 184	24 260	1 786	1 953
Lithuania	1 019 971	:	:	47 146	:	8 758	33 292	2 895	2 801
Luxembourg	296 562	:	:	:	:	:	14 243	:	
Hungary	2 859 842	179 818	30 076	149 742	51 294	24 765	93 663	4 496	5 600
Malta	167 710	24 777	10 562	14 215	4 790	7 265	10 539	903	1 280
Netherlands	5 967 001	:	:	:	:	:	319 670	10 064	23 976
Austria	2 906 994	337 545	:	:	:	:	154 061	3 847	10 563
Poland	9 996 913	406 254	102 478	303 776	101 276	77 299	194 883	13 271	19 525
Portugal	3 482 918	:	:	:	:	102 989	242 053	6 325	13 439
Romania	3 990 005	227 646	49 703	177 943	56 859	38 824	118 209	5 226	8 528
Slovenia	666 653	:	:	:	:	12 519	25 118	676	2 176
Slovakia	1 604 048	66 565	13 980	52 585	9 090	11 189	41 634	1 947	2 705
Finland	1 528 820	:	:	:	:	10 174	57 106	1 711	4 730
Sweden	3 236 026	233 003	56 178	176 825	45 485	42 548	132 976	2 714	9 280
Iceland	:	19 304	8 956	10 348	5 048	4 420	6 931	814	2 091
Norway	1 588 150	129 101	34 698	94 403	34 418	26 016	61 466	2 055	5 146
Switzerland	2 800 135	:	86 391	:		66 587	128 577	:	13 866

Source: Eurostat (online data code: sbs_na_sca_r2, sbs_na_1a_se_r2)



Table 5: Number of persons employed, 2020 Source: Eurostat (sbs na sca r2), (sbs na 1a se r2)

The availability of country data on turnover and value added is also fragmented (see Table 6 and Table 7).

Turnover amounted to € 117 billion for Germany (not including inter-urban passenger rail transport), followed by Italy (€ 76 billion) and Spain (€ 59 billion, not including taxi operation) (note that there is no data available for France).

In terms of value added the first three countries were the same: Germany, with € 56 billion (not including passenger rail transport), followed by Italy (€ 26 billion) and Spain (€ 19 billion, not including taxi operation) (note that there is no data available for France). The highest shares of value added in the tourism industries in the total non-financial business economy of the country were observed in Austria, Malta, Croatia, Cyprus and Greece (all above 4 %).

⁽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: H491, H4932, H4939, H501, H503, H511, I551, I552, I553, I561, I563, N771, N7721 and division N79. EU aggregate underestimated. BG: excluding H4910, H501 and H503, DK, DE, EL: excluding H4910, ES: excluding H4932, MT: excluding H503 and I553, PL: excluding H501 and H503.

⁽³⁾ NACE classes: H511, I551, I552, I553 and N791. Country data might be underestimated, see footnote (2).

⁽⁴⁾ NACE classes: H491, H4932, H4939, H501, H503, I561, I563, N771, N7721 and N799. Country data might be underestimated, see footnote (2).

⁽⁵⁾ NACE classes: H491, H4932, H4939, H501, H503 and H511. Country data might be underestimated, see footnote (2).

⁽⁶⁾ NACE classes: I551, I552 and I553. Country data might be underestimated, see footnote (2).

⁽⁷⁾ NACE classes: I561 and I563.

⁽⁸⁾ NACE classes: N771 and N7721.

⁽⁹⁾ NACE division N79.

[&]quot;:" = Aggregate not available and not possible to estimate.

Turnover or gross premiums written, 2020 (in million EUR)

	Total non- financial business economy(¹)	Tourism industries (total)(²)	Tourism industries (mainly tourism)(3)	Tourism industries (partially tourism)(4)	Transport (total)(°)	Accommodation (scope of Reg 692/2011)(°)	Food and beverage (total)(')	Car and other rental (total)(8)	Travel agency, tour operators and other reservation services (total)(°)
EU	24 774 210	613 474	179 371	434 103	149 829	95 177	230 726	96 419	41 324
Belgium	1 039 288	21 333	4 418	16 915	5 156	1 728	8 151	4 807	1 491
Bulgaria	148 135	:	:	:	:	561	1 203	:	209
Czechia	513 426	7 170	1 955	5 215	1 086	965	3 375	660	1 084
Denmark	548 624	11 921	3 424	8 496	3 817	1 405	4 240	1 567	892
Germany	6 705 217	116 880	40 091	76 790	15 701	18 472	34 143	34 356	14 208
Estonia	63 466	:	362	:	:	170	506	:	108
Ireland	809 680	:	:	:	:	1 759	4 189	:	1 100
Greece	233 195	10 093	3 345	6 748	2 028	2 359	4 419	668	619
Spain	1 888 814	59 301	19 764	39 537	8 923	8 897	29 121	6 051	6 308
France	3 628 816	:	30 801	:	:	17 646	47 631	17 982	4 428
Croatia	87 047	3 172	1 185	1 987	377	930	1 399	251	216
Italy	2 713 560	75 869	19 921	55 948	15 189	13 256	35 546	8 189	3 690
Cyprus	35 210	1 318	403	915	52	340	829	46	51
Latvia	57 729	:	:	:	:	126	458	135	171
Lithuania	97 136	:	:	1 103	:	183	680	296	126
Luxembourg	167 514	:	:	:	:	:	855	579	45
Hungary	320 081	6 257	2 029	4 228	2 029	657	2 439	887	244
Malta	23 463	:	:	521	:	:	322	77	62
Netherlands	1 614 895	:	:	:	:	:	11 940	:	:
Austria	720 520	28 278	:	:	:	:	7 725	3 786	1 718
Poland	1 147 430	16 880	5 561	11 318	3 262	3 121	6 874	2 381	1 242
Portugal	351 225	:	:	:	:	2 470	6 536	1 720	735
Romania	327 691	5 848	1 550	4 298	1 234	906	2 645	654	408
Slovenia	97 838	:	:	:	:	453	939	141	129
Slovakia	200 387	2 233	526	1 707	218	350	1 201	321	143
Finland	396 727	:	:	:	:	873	3 890	977	756
Sweden	837 098	20 430	6 640	13 789	4 446	3 500	9 470	784	2 229
Iceland	26 203	1 596	896	700	663	244	424	97	168
Norway	509 211	11 987	5 192	6 795	4 107	2 043	3 731	805	1 301
Switzerland	1 957 062	:	:	:	:	:	9 189	:	3 630

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Table 6: Turnover or gross premiums written, 2020 (million EUR) Source: Eurostat (sbs_na_sca_r2), (sbs_na_1a_se_r2)

⁽¹⁾ NACE sections: B-N_S95_X_K (Total business economy; repair of computers, personal and household goods; except financial and insurance activities).

⁽⁴⁾ NACE classes: H491, H4932, H4939, H501, H503, H511, I551, I552, I553, I561, I563, N771, N7721 and division N79. EU aggregate underestimated. DK, DE, EL, HR: excluding H4910, ES: excluding H4932, LU: excluding N7721 and N799, MT: excluding H503, PL: excluding H501 and H503, SK: excluding H4910 and H501. (2) NACE classes: H511, I551, I552, I553 and N791. Country data might be underestimated, see footnote (3).

⁽⁴⁾ NACE classes: H491, H4932, H4939, H501, H503, I561, I563, N771, N7721 and N799. Country data might be underestimated, see footnote (2).

⁽⁵⁾ NACE classes: H491, H4932, H4939, H501, H503 and H511. Country data might be underestimated, see footnote (2).

⁽⁶⁾ NACE classes: I551, I552 and I553.

^(*) NACE classes: I561 and I563.
(*) NACE classes: N771 and N7721. Country data might be underestimated, see footnote (2).

^(*) NACE division N79. Country data might be underestimated, see footnote (*).

":" = Aggregate not available and not possible to estimate.

Source: Eurostat (online data code: sbs_na_sca_r2, sbs_na_1a_se_r2)

Value added at factor cost, 2020 (in million EUR)

	Total non- financial business economy(¹)	Tourism industries (total)(²)	Tourism industries (mainly tourism)(3)	Tourism industries (partially tourism)(4)	Transport (total)(⁵)	Accommodatio n (scope of Reg 692/2011)(6)	Food and beverage (total)(⁷)	Car and other rental (total)(8)	Travel agency, tour operators and other reservation services (total)(°)
EU	6 496 219	236 283	45 369	190 914	49 034	38 411	90 044	52 918	5 876
Belgium	234 478	7 619	765	6 854	2 229	597	2 421	2 253	119
Bulgaria	33 244	:	:	:	:	258	412	139	37
Czechia	112 741	2 354	362	1 993	592	316	991	367	88
Denmark	168 455	4 599	893	3 706	1 438	624	1 882	516	140
Germany	1 818 581	56 357	12 293	44 064	3 643	10 134	18 305	22 167	2 108
Estonia	14 230	:	77	:	:	69	182	:	21
Ireland	273 793	:	:	:	:	932	1 702	:	147
Greece	47 033	1 942	641	1 301	377	644	535	302	84
Spain	496 581	18 917	2 794	16 123	2 153	2 789	10 212	3 092	672
France	968 776	:	6 225	:	:	5 101	19 926	9 441	755
Croatia	25 311	1 183	482	702	155	413	523	40	53
Italy	691 324	26 441	6 345	20 096	6 260	5 006	10 400	4 199	576
Cyprus	9 526	427	94	334	5	72	298	21	32
Latvia	13 417	:	:	:	:	50	164	52	17
Lithuania	24 358	:	:	488	:	95	319	122	21
Luxembourg	28 324	:	:	:	:	:	436	:	7
Hungary	69 635	1 356	416	940	63	214	695	361	23
Malta	6 802	368	160	208	44	139	135	28	
Netherlands	400 192	:	:	:	:	:	4 535	:	0
Austria	201 465	14 626	:	:	:	:	4 417	1 858	274
Poland	274 676	5 158	1 055	4 103	1 262	828	1 931	1 041	95
Portugal	87 007	:	:	:	:	945	2 531	571	118
Romania	81 915	:	:	:	:	406	826	372	112
Slovenia	25 372	:	:	:		245	389	36	
Slovakia	41 192	575	92	483	41	115	263	151	5
Finland	104 113	:	:	:		255	1 421	368	
Sweden	243 677	7 889	1 873	6 017	1 702		4 194	313	
Iceland	8 624	556	250	306	212		181	52	
Norway	165 994	3 837	482	3 355	1 204	638	1 482	371	142
Switzerland	404 935				. 201		4 365		- 28

Source: Eurostat (online data code: sbs_na_sca_r2, sbs_na_1a_se_r2)

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Table 7: Value added at factor cost, 2020 (million EUR) Source: Eurostat (sbs na sca r2), (sbs_na_1a_se_r2)

Infra-annual analysis

The above analysis was based on structural business statistics (SBS). While SBS is a rich and comprehensive source of information on European businesses, these statistics are only provided annually. Compared with other sectors of the economy, the tourism sector has a relatively strong seasonal component, hence the need to look at infra-annual data to complete the analysis. Short-term business statistics provide monthly and quarterly indices for a subset of tourism industries. For the analysis in this article, an aggregate was created including NACE divisions H51 (Air travel), I55 (Accommodation) and N79 (Travel agency, tour operator and other reservation service and related activities).

Figure 3 shows for the EU above mentioned tourism industries, the guarterly evolution of the turnover, seasonally adjusted or working days adjusted, for the years 2007 to 2022 (index: average 2015 = 100). The graph shows a positive trend that was interrupted from the fourth quarter of 2008 (global financial crisis) until mid-2010 when the turnover started to increase again. The upwards trend continued until spring 2020. After the travel restrictions implemented in March and April 2020 in response to the Covid-19 outbreak, the turnover of tourism industries dropped sharply in the second quarter of 2020. In spring and summer 2021 many restrictions were raised and travelling became easier. In 2022 the turnover shows clear signs of recovery, reaching and even surpassing the pre-pandemic levels.

⁽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: H491, H4932, H4939, H501, H503, H511, I551, I552, I553, I561, I563, N771, N7721 and division N79. EU aggregate underestimated. DK, EL, HR, SK: excluding H4910, ES: excluding H4932, LU: excluding N799, MT: excluding I553, NL: excluding N791 and N799, PL: excluding H501 and H503 (3) NACE classes: H511, I551, I552, I553 and N791. Country data might be underestimated, see footnote (2).

⁽⁴⁾ NACE classes: H491, H4932, H4939, H501, H503, I561, I563, N771, N7721 and N799. Country data might be underestimated, see footnote (2).

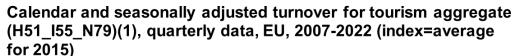
⁽⁵⁾ NACE classes: H491, H4932, H4939, H501, H503 and H511. Country data might be underestimated, see footnote (2).

⁽⁶⁾ NACE classes: I551, I552 and I553,

⁽⁷⁾ NACE classes: I561 and I563.

⁽⁸⁾ NACE classes: N771 and N7721. (°) NACE division N79. Country data might be underestimated, see footnote (2).

⁼ Aggregate not available and not possible to estimate.



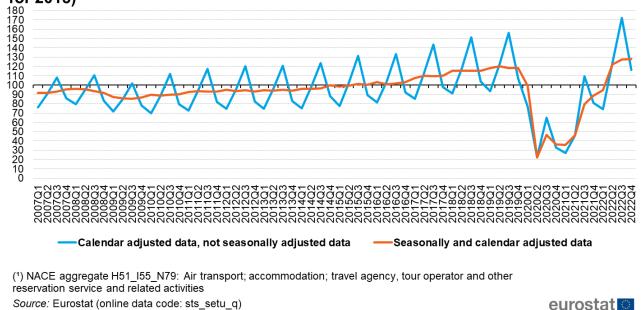
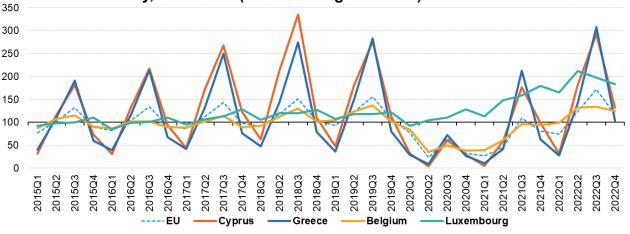


Figure 3: Calendar and seasonally adjusted turnover for tourism aggregate (H51_I55_N79)(1), quarterly data, EU, 2007-2022 (index=average for 2015) Source: Eurostat (sts_setu_q)

The overall situation at EU level shown in Figure 3 aggregates data from countries with a very different seasonal profile. Figure 4 shows, for the years 2015 to 2022, the quarterly working days adjusted turnover for the above mentioned group of tourism industries for the countries which present the highest (Cyprus and Greece) and the lowest (Belgium and Luxembourg) seasonality in terms of turnover, as well as for the EU as a whole. Note that the atypical pattern for Luxembourg, with continued growth in 2020-2022, was mainly driven by the growth in the non-tourism related activity "freight air transport and space transport" (unpublished data).





(¹) NACE aggregate H51_I55_N79: Air transport; accommodation; travel agency, tour operator and other reservation service and related activities

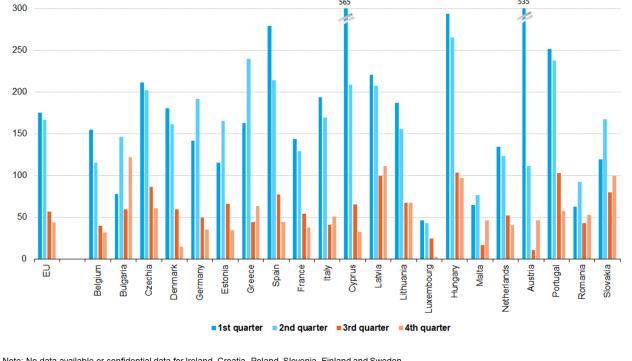
Source: Eurostat (online data code: sts_setu_q)

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Figure 4: Turnover adjusted by working days for tourism aggregate (H51_I55_N79)(1), quarterly data, EU countries with highest and slowest seasonality, 2015-2022 (index=average for 2015) Source: Eurostat (sts_setu_q)

Figure 5a focuses on 2022 and shows a clear recovery in the turnover in these tourism industries. At EU level, the highest increases compared with the same periods of 2021 were recorded in the first quarter, when the turnover increased by 175 % compared with the first quarter of 2021. The turnover increased also in the next quarters: +167 % in the second quarter, +57 % in the third quarter and +44 % in the fourth quarter. The big increases in the first two quarters of 2022 reflect the relatively low activity levels in the first two quarters of 2021. The lower increases in the second half of the year can be explained by the recovery starting already in 2021 (see Figure 5b). The highest increases in the second half of 2021 were Cyprus, Spain and Greece.

Change in turnover in tourism aggregate (H51_I55_N79)(¹), 2022 compared with 2021, quarterly data (%)



Note: No data available or confidential data for Ireland, Croatia, Poland, Slovenia, Finland and Sweden.

(¹) NACE aggregate H51_I55_N79: Air transport; accommodation; travel agency, tour operator and other reservation service and related

Source: Eurostat (online data code: sts_setu_q)

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Figure 5a: Change in turnover in tourism aggregate (H51_I55_N79)(1), 2022 compared with 2021, quarterly data (%) Source: Eurostat (sts_setu_q)

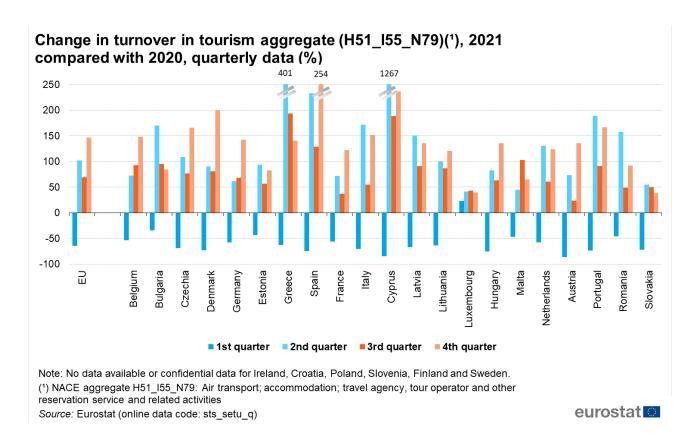


Figure 5b: Change in turnover in tourism aggregate (H51_I55_N79)(1), 2021 compared with 2020, quarterly data (%) Source: Eurostat (sts_setu_q)

Figure 6 shows for the period January 2015 to December 2022, the monthly evolution of the working days adjusted turnover in EU accommodation, and the nights spent in tourist accommodation establishments (index: average 2015 = 100). As expected, the two series follow a similar pattern in terms of peak and trough periods; however, the variability appears to be more pronounced for the physical flows (nights spent) as compared with the monetary flows (turnover). This graph clearly shows the sharp drop in March and April 2020 when many hotels were closed. Despite the partial recovery during the summer months of 2020, the turnover and the nights spent in tourist accommodation remained at very low levels compared with the previous years. The first signs of recovery appeared in May 2021, while in April 2022 the turnover reached the pre-pandemic levels.

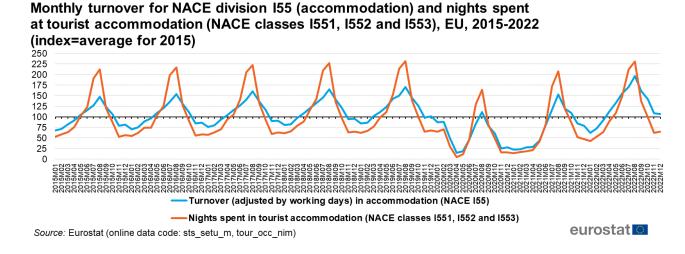


Figure 6: Monthly turnover for accommodation(NACE I55) and nights spent at tourist accommodation (NACE I551, I552 and I553), EU, 2015-2022 (index=average for 2015) Source: Eurostat (sts_setu_m), (tour_occ_nim)

Data sources

Structural business statistics (SBS) are a main component 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 allow for the identification and selection of industries that are part of the tourism sector. According to the International Recommendations for Tourism Statistics 2008 the tourism sector (also: 'tourism industries' or 'tourism characteristic activities') includes 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 8. All these activities are covered by SBS, except for culture, sports and recreation.

List of tourism industries

UNWTO tourism industries	ISIC	NACE	Description (NACE Rev.2)
	Rev.4(1)	Rev.2(2)	· · ·
	5510	5510	Hotels and similar accommodation
		5520	Holiday and other short-stay accommodation
	5520	5530	Camping grounds, recreational vehicle parks and trailer parks
1. Accommodation for visitors	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 (*)
Food and beverage serving	5610	5610	Restaurants and mobile food service activities
2. activities	5629	5629	Other food service activities (*)
ucuvides	5630	5630	Beverage serving activities
Railway passenger transport	4911	4910	Passenger rail transport, interurban
4. Road passenger transport	4922	4932	Taxi operation
Troug passenger transport		4939	Other passenger land transport n.e.c.
5. Water passenger transport	5011	5010	Sea and coastal passenger water transport
o. Water passenger transport	5021	5030	Inland passenger water transport
Air passenger transport	5110	5110	Passenger air transport
7. Transport equipment rental	7710	7711	Renting and leasing of cars and light motor vehicles
7. Trunsport equipment rental		7712	Renting and leasing of trucks
8. Travel agencies and other	7911	7911	Travel agency activities
reservation services activities	7912	7912	Tour operator activities
reservation services activities	7990	7990	Other reservation service and related activities
	9000	9001	Performing arts (*)
		9002	Support activities to performing arts (*)
		9003	Artistic creation (*)
9. Cultural activities		9004	Operation of arts facilities (*)
	9102	9102	Museums activities (*)
		9103	Operation of historical sites and buildings and similar visitor
	9103	9104	Botanical and zoological gardens and nature reserves activities
	7721	7721	Renting and leasing of recreational and sports goods
	9200	9200	Gambling and betting activities (*)
10. Sports and recreational activities	9311	9311	Operation of sports facilities (*)
10. Sports and recreational activities		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 - Annex 3, p. 111 (https://unstats.un.org/unsd/publication/seriesm/seriesm 83rev1e.pdf)



Table 8: List of tourism industries

This article uses a fine-tuned list of the tourism industries, better adapted to the European setting and avoiding overestimations of the economic variables. Activities omitted include "other accommodation" (NACE 5590), "other food service activities" (NACE 5629) and "real estate activities" (NACE 68), these activities are not sufficiently

⁽²⁾ Source: conversion table ISIC Rev.4 - NACe Rev.2

Hittps://ec.europa.eu/eurostat/tramon/relations/index.ofm?TargetUrl=LST_LINK&StrNomRelCode=ISIC%20REV.%204%20-%20NACE%20REV.%202&StrLanguageCode=EN)

^(*) Activities omitted in the current article.

related to tourism to justify their inclusion in the current analysis.

Existing business statistics (SBS, STS) 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. For this reason, this analysis considers these industries in their totality. Considering the total turnover or employment overestimates the true economic importance of tourism for these industries, but on the other hand, tourism also contributes to other industries not listed in Table 8. The approach used in this article should not be confused with the methodological framework to compile tourism satellite accounts (TSA); the most recent Eurostat statistical report on TSA in Europe is available from the Eurostat website.

Notwithstanding these shortcomings, SBS data allow for an economic analysis of the sector which is not possible using only 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 air transport (NACE H51), accommodation (NACE I55) and travel agency, tour operator reservation service and related activities (NACE N79).

Source data for tables and graphs

Tourism industries-economic analysis graphs and tables

Context

Following its communication " A new industrial strategy for Europe " (March 2020), the Commission will systematically analyse the risks and needs of different industrial ecosystems. The notion of ecosystem captures the complex set of interlinkages among sectors and firms spreading across countries in the Single Market. Ecosystems encompass all players operating in a value chain: from the smallest start-ups to the largest companies, from academia to research, together with the forces that shape the market environment in which they operate.

Tourism is one of the 14 ecosystems identified, each with its own set of sectors that should cover the entire economic industrial landscape. The tourism ecosystem is a network of globalised and interconnected value chains of both online and offline tourism services providers, where small companies operate along with large multinational corporations.

The green transformation of industry supported by the Strategy will reduce the environmental footprint of our industrial activities and empower industry to provide effective solutions for the societal challenges of the future such as sustainable tourism.

Tourism statistics focus on the accommodation sector on the one hand and the demand side (from households) on the other hand. ESS 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 business 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, which is an important motor for many countries' economies and labour market.

Other articles

· Tourism industries - employment

· All articles on Tourism

Publications

· Recent Eurostat publications on tourism

Main tables

• Tourism (t_tour), see:

Monthly data on tourism industries (t_tour_indm)

Annual data on tourism industries (t_tour_inda)

Database

• Tourism (tour), see:

Monthly data on tourism industries (tour_indm)

Annual data on tourism industries (tour_inda)

• Structural business statistics (sbs), see:

Annual enterprise statistics for special aggregates of activities (NACE Rev. 2) (sbs_na_sca_r2)

Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) (sbs_na_1a_se_r2)

· Short term business statistics (sts), see:

Trade and services (sts_ts)

Services (sts os)

Dedicated section

- Tourism
- · Short term business statistics (STS)
- Structural business statistics (SBS)

Methodology

- Methodological manual for tourism statistics
- · Structural business statistics introduced
- · Short-term business statistics introduced

Legislation

- Commission Implementing Regulation (EU) No 1051/2011 of 20 October 2011 implementing Regulation (EU) No 692/2011 concerning European statistics on tourism, as regards the structure of the quality reports and the transmission of the data.
- Summaries of EU legislation: Tourism statistics
- Regulation (EU) No 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.
- Delegated Regulation (EU) 2019/1681 of 1 August 2019 amending Regulation (EU) No 692/2011 of the European Parliament and of the Council concerning European statistics on tourism, as regards the transmission deadlines and adaptation of Annexes I and II.