

Tourism industries - economic analysis

Statistics Explained

Data extracted in April 2018 Planned article update: April 2019

This article presents recent statistics on the [tourism industries](#) in the [European Union \(EU\)](#) . While [tourism statistics](#) focus on either the accommodation sector or the demand side (from households), and relate mainly to physical flows (arrivals or nights spent at [tourist accommodation](#) 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 analysis of this sector can be drawn, which is an important motor for many countries' economies and labour markets.

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 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 and availability" 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 2015, one in ten enterprises in the European non-financial business economy belonged to the tourism industries (see Table 1, Table 2). These 2.4 million enterprises employed 12.7 million persons. Enterprises in industries with tourism related activities accounted for 9.2 % of the persons employed in the non-financial business economy and 21.5 % of persons employed in the services sector.

Key economic indicators for the tourism industries, EU-28, 2015

	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 (*)		23 500 343	27 307 303	7 033 142	137 444 933
Total services (*)		11 589 214	6 443 037	2 940 083	58 940 732
Total tourism industries (*)		2 350 641	1 038 461	398 256	12 650 646
... Tourism industries (mainly tourism) (*)		396 642	468 557	145 535	3 332 343
... Tourism industries (partially tourism) (*)		1 963 999	569 904	252 721	9 318 303
Transport related (total)		371 032	272 441	99 695	1 976 304
... Land transport		356 940	115 212	59 389	1 519 499
... Passenger rail transport, interurban	H4910	290	54 567	25 491	358 917
... Taxi operation	H4932	306 765	22 827	13 408	614 055
... Other passenger land transport n.e.c.	H4939	49 885	37 819	20 490	546 527
... Water transport		10 049	23 202	8 586	112 350
... Sea and coastal passenger water transport	H5010	5 949	21 202	7 751	91 390
... Inland passenger water transport	H5030	4 100	2 000	835	20 960
... Passenger air transport	H5110	4 043	134 026	31 721	344 455
Accommodation (scope of Reg 692/2011)		307 765	175 393	84 258	2 546 635
... Hotels and similar accommodation	I5510	154 311	145 442	71 233	2 118 793
... Holiday and other short-stay accommodation	I5520	137 068	20 165	6 203	330 605
... Camping grounds, recreational vehicle parks and trailer parks	I5530	16 386	9 785	4 823	97 237
Food and beverage (total)		1 511 310	346 572	140 444	7 412 779
... Restaurants and mobile food service activities	I5610	930 300	256 097	105 444	5 282 075
... Beverage serving activities	I5630	581 010	90 475	35 000	2 130 704
Car and other rental (total)		55 700	73 574	41 036	204 675
... Renting and leasing of cars and trucks	N7710	41 836	71 334	40 000	171 356
... Renting and leasing of recreational and sports goods	N7721	13 864	2 241	1 036	33 319
Travel agency, tour operator reservation service and related activities (total)		104 818	170 482	32 823	510 253
... Travel agency and tour operator activities	N7910	74 834	159 138	29 556	441 253
... Other reservation service and related activities	N7990	30 000	11 344	3 267	69 000

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

(*) NACE sections: B-N, S95_X_K (Total business economy; repair of computers, personal and household goods; except financial and insurance activities).

(*) NACE sections: H, I, J, L, M, N, S95.

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

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

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

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

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Table 1: Key economic indicators for the tourism industries, EU-28, 2015 - Source: Eurostat (sbsnascar2), (sbsnalaser2)

Key economic indicators for the tourism industries, percentages, EU-28, 2015

	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(*)		10.0%	3.8%	5.7%	9.2%
Total tourism industries as share of total Services(*)		20.3%	16.1%	13.5%	21.5%
Total tourism industries(*), of which:		100.0%	100.0%	100.0%	100.0%
... Tourism industries (mainly tourism)(*)		16.4%	45.1%	36.5%	26.3%
... Tourism industries (partially tourism)(*)		83.6%	54.9%	63.5%	73.7%
Total tourism industries, of which:		100.0%	100.0%	100.0%	100.0%
Transport related (total)		15.8%	26.2%	25.0%	15.6%
... Land transport		15.2%	11.1%	14.9%	12.0%
... Passenger rail transport, interurban	H4910	<0.5%	5.3%	6.4%	2.8%
... Taxi operation	H4932	13.1%	2.2%	3.4%	4.9%
... Other passenger land transport n.e.c.	H4939	2.1%	3.6%	5.1%	4.3%
... Water transport		<0.5%	2.2%	2.2%	0.9%
... Sea and coastal passenger water transport	H5010	<0.5%	2.0%	1.9%	0.7%
... Inland passenger water transport	H5030	<0.5%	<0.5%	<0.5%	<0.5%
... Air transport	H5110	<0.5%	12.9%	8.0%	2.7%
Accommodation (scope of Reg 692/2011)		13.1%	16.9%	21.2%	20.1%
... Hotels and similar accommodation	I5510	6.6%	14.0%	17.9%	16.7%
... Holiday and other short-stay accommodation	I5520	5.8%	1.9%	2.1%	2.6%
... Camping grounds, recreational vehicle parks and trailer parks	I5530	0.7%	0.9%	1.2%	0.8%
Food and beverage (total)		64.3%	33.4%	35.3%	58.6%
... Restaurants and mobile food service activities	I5610	39.6%	24.7%	26.5%	41.8%
... Beverage serving activities	I5630	24.7%	8.7%	8.8%	16.8%
Car and other rental (total)		2.4%	7.1%	10.3%	1.6%
... Renting and leasing of cars and trucks	N7710	1.8%	6.9%	10.0%	1.4%
... Renting and leasing of recreational and sports goods	N7721	0.6%	<0.5%	<0.5%	<0.5%
Travel agency, tour operator reservation service and related activities (total)		4.5%	16.4%	8.2%	4.0%
... Travel agency and tour operator activities	N7910	3.2%	15.3%	7.4%	3.5%
... Other reservation service and related activities	N7990	1.3%	1.1%	0.8%	0.5%

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

(*) NACE sections: B-N, S95_X_K (Total business economy; repair of computers, personal and household goods; except financial and insurance activities).

(*) NACE sections: H, I, J, L, M, N, S95.

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

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

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Table 2: Key economic indicators for the tourism industries, percentages, EU-28, 2015 - Source: Eurostat (sbsnascar2), (sbsnalaser2)

The tourism industries' shares of total turnover and value added at factor cost were relatively lower, with the tourism industries accounting for 3.8 % of the turnover and 5.7 % 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 and availability" section, tourism industries do not provide services only to tourists. Their employment, turnover, etc. is also related to services provided to non-tourists. In Tables 1 and 2, the subdivision "mainly tourism" and "partially tourism" takes this into account. For instance, 3.3 million persons are employed in industries that are assumed to serve predominantly tourists while 9.3 million persons are

employed in 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 2015. Tourism industries (mainly and partially) showed a stronger growth than the total economy for all indicators concerned. Looking at those industries that are 'mainly tourism' the value added recorded a growth of +24 % between 2012 and 2015, the number of enterprises grew by +14 %, the turnover by +11 % and the number of persons employed by +6 % (for the total economy the corresponding growth rates were +14 %, +5 %, +5 % and +3 % respectively).

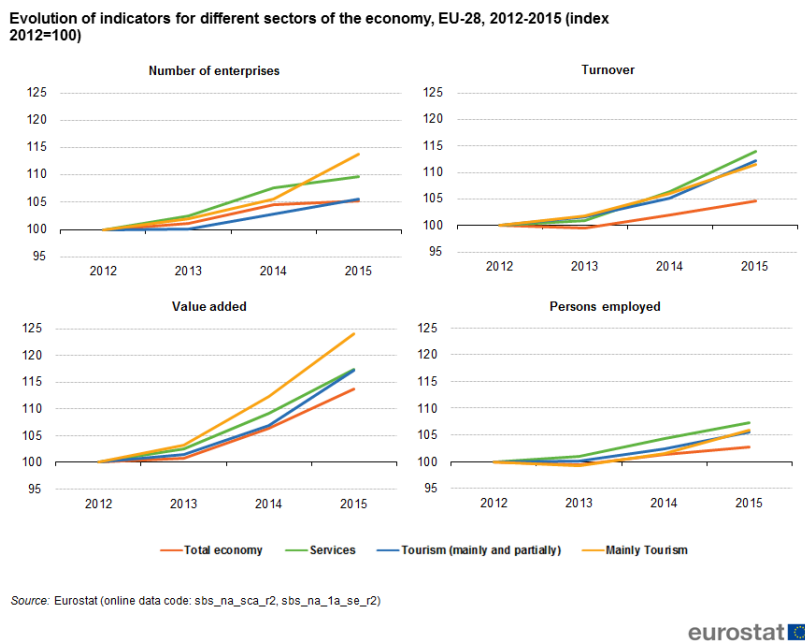
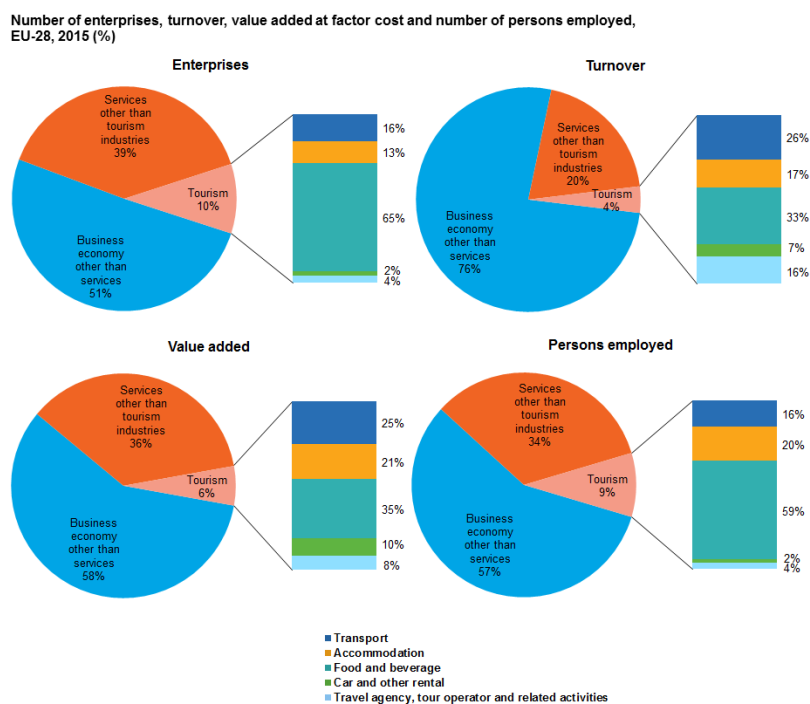


Figure 1: Evolution of indicators for different sectors of the economy, EU-28, 2012-2015 (index 2012=100) - Source: Eurostat (sbsnascar2), (sbsnalaser2)

Analysis by subsectors

Nearly four out of five enterprises in the tourism industries operated in accommodation (NACE I55) or food and beverage serving activities (NACE I56): 13 % and 65 % respectively (see Table 1, Table 2, Figure 2). Looking at the number of persons employed, the weight of these activities was 79 % of all persons employed in the tourism industries. However, in terms of turnover and value added, their share was much lower (50 % of turnover, 56 % of value added).



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Figure 2: Number of enterprises, turnover, value added at factor cost and number of persons employed, EU-28, 2015 (%) - Source: Eurostat (sbsnascar2), (sbsna1aser2)

The turnover of passenger transport related industries (parts of NACE H49, H50, H51) represented 26 % of the turnover for all tourism industries: half of this share (13 %) came from the subsector of passenger air transport (NACE H5110).

Travel agencies (NACE N7911) and tour operators (NACE N7912) recorded a turnover of 159 billion euro in 2015. These activities represented 15 % of the turnover in tourism industries, compared with a 7 % share in value added at factor cost and a 3 % share in employment and in number of enterprises.

Geographical analysis

More than half (52 %) of the 2.4 million enterprises in the tourism industries in the EU in 2015, were located in four Member States: 361 thousand in Italy, 331 thousand in France, 278 thousand in Spain (not including taxi operation) and 257 thousand in Germany (not including passenger rail transport interurban) (see Table 3).

Number of enterprises, 2015

	Total non-financial business economy ^(*)	Tourism industries (total) ^(*)	Tourism industries (mainly tourism) ^(*)	Tourism industries (partially tourism) ^(*)	Transport (total) ^(*)	Accommodation (scope of Reg 692/2011) ^(*)	Food and beverage (total) ^(*)	Car and other rental (total) ^(*)	Travel agency, tour operators and other reservation services (total) ^(*)
EU-28	23 500 343	2 350 641	386 642	1 963 999	371 032	307 765	1 511 311	55 700	104 818
Belgium	602 153	51 885	4 994	46 891	2 816	3 583	42 476	1 295	1 715
Bulgaria	326 219	34 436	5 700	28 736	5 260	4 169	21 463	1 713	1 811
Czech Republic	1 001 048	65 712	10 869	54 843	3 218	6 240	49 017	1 116	6 121
Denmark	210 726	16 040	1 967	14 073	2 883	1 479	10 606	528	564
Germany	2 408 262	256 613	57 450	199 163	25 878	46 032	167 673	5 259	11 971
Estonia	98 124	3 850	1 028	2 822	540	732	1 650	530	398
Ireland	243 433						13 837	307	1 020
Greece	789 975	155 506	32 337	123 169	36 650	29 016	84 446	1 933	3 461
Spain	2 455 540	277 654	31 396	246 258	4 061	22 912	235 260	4 207	11 393
France	2 908 814	330 682	54 254	276 428	55 254	48 865	204 230	13 530	8 703
Croatia	146 637	23 800	4 052	19 748	1 924	2 390	16 909	688	1 889
Italy	3 683 127	361 453	58 065	303 388	29 632	47 708	263 493	4 506	16 114
Cyprus	48 329	6 778	836	5 940	1 179	518	14 445	212	424
Latvia	109 642	6 511	1 577	4 934	1 199	842	2 619	954	887
Lithuania	186 468	11 374	2 862	8 512	3 593	2 439	3 072	1 117	1 153
Luxembourg	31 926		361			284	2 471	125	84
Hungary	536 510	39 498	4 226	34 172	7 996	3 047	23 873	1 538	2 044
Malta	26 059	3 043	408	2 635	544	173	1 736	193	397
Netherlands	1 092 243	62 609	12 110	50 499	8 560	7 807	38 675	2 260	5 307
Austria	322 325	54 071	17 290	36 781	5 524	16 055	30 113	771	1 608
Poland	1 606 559	102 939	19 949	83 990	44 460	14 016	34 435	3 410	6 509
Portugal	807 183	105 689	18 086	87 603	10 869	16 230	74 288	1 076	3 216
Romania	458 122	36 955	6 488	30 467	10 346	3 862	19 009	925	2 813
Slovenia	134 727	12 362	2 894	9 468	1 125	2 342	7 732	265	896
Slovakia	429 524	22 279	2 958	19 321	4 978	1 715	12 491	654	1 441
Finland	229 096	20 596	1 577	19 019	8 878	1 119	8 742	389	1 468
Sweden	686 433	44 490	8 186	36 304	9 567	5 801	24 370	1 137	3 615
United Kingdom	1 940 949	150 415	21 847	128 568	11 458	15 050	111 170	5 043	7 694
Norway	293 403	20 437	3 701	16 736	7 333	2 912	7 278	708	2 306
Switzerland	142 775		4 327			3 503	13 293		953
Former Yugoslav Republic of Macedonia	54 738			5 745	1 941	268	3 728	58	274
Bosnia and Herzegovina	85 800	6 267	522	13 429	3 186		10 120	98	210

Note: Tourism aggregates estimated using available data and including 2014 data for some countries. Due to unreliable data at country level, the use of 2014 data instead of 2015, and rounding, deviations can occur between total and subtotals.
 (*) NACE sections: B-N_S95_X_K (Total business economy; repair of computers, personal and household goods; except financial and insurance activities).
 (†) NACE classes: H491, H4932, H4939, H501, H503, H511, H515, H52, H53, H561, H563, N771, N7721 and division N79. Country data does not include the following NACE classes: H491 for BG, DE and EL; H4932 for ES; H501 for CY.
 (‡) NACE classes: H511, H515, H52, H53 and N791.
 (¶) NACE classes: H491, H4932, H4939, H501, H503, H51, H515, H53, N771, N7721 and N799. Country data does not include the following NACE classes: H491 for BG, DE and EL; H4932 for ES; H501 for CY.
 (‡) NACE classes: H491, H4932, H4939, H501, H503 and H511. Country data does not include the following NACE classes: H491 for BG, DE and EL; H4932 for ES; H501 for CY.
 (¶) NACE classes: H511, H52 and H53.
 (†) NACE classes: H51 and H53.
 (‡) NACE classes: N771 and N7721.
 (¶) 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)

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Table 3: Number of enterprises, 2015 - Source: Eurostat (sbsnascar2), (sbsna1aser2)

Looking at the available Member States' data, in terms of employment (see Table 4), Germany (not including passenger rail transport interurban) and the United Kingdom recorded each 2.3 million persons employed in the tourism industries, followed by Italy (1.4 million) and Spain (1.3 million, not including taxi operation). The highest share of employment in the tourism industries in the total non-financial business economy of the country was observed in Greece and Cyprus (both above 20 %) (note that data on total employment in the tourism industries is missing for a significant number of countries).

Number of persons employed, 2015

	Total non-financial business economy ^(*)	Tourism industries (total) ^(*)	Tourism industries (mainly tourism) ^(*)	Tourism industries (partially tourism) ^(*)	Transport (total) ^(*)	Accommodation (scope of Reg 692/2011) ^(*)	Food and beverage (total) ^(*)	Car and other rental (total) ^(*)	Travel agency, tour operators and other reservation services (total) ^(*)
EU-28	137 444 933	12 650 646	3 332 343	9 318 303	1 976 304	2 546 635	7 412 778	204 675	510 253
Belgium	2 769 085	35 177			22 722	135 692	4 263	8 732	
Bulgaria	1 911 916	156 653	46 206	110 447	18 275	39 232	90 898	2 318	5 930
Czech Republic	3 591 396	190 112			28 604	32 541	119 395	2 112	12 459
Denmark	1 666 048					17 915	46 903	1 843	6 108
Germany	28 258 410	2 317 178	693 357	1 623 821	277 574	546 358	1 360 338	32 654	100 254
Estonia	414 763					6 938	15 234		1 633
Ireland	1 308 019						102 647	2 304	5 586
Greece	2 162 572	496 539	134 301	362 238	61 564	116 721	298 158	5 123	14 973
Spain	11 109 702	1 310 622	334 958	975 664	95 624	281 299	879 906	19 521	54 272
France	14 645 799			751 242		197 185	539 524	24 594	38 796
Croatia	989 598	118 366	38 715	79 651	15 351	31 478	63 337	1 541	6 958
Italy	14 225 278	1 437 137	314 309	1 122 828	175 059	257 538	943 893	14 420	46 227
Cyprus	215 716	42 504	19 274	23 230	1 948	17 679	20 497	737	1 643
Latvia	633 450	42 992	9 850	33 142	7 528	6 662	24 704	1 622	2 476
Lithuania	934 440	49 922	10 640	39 282	6 553	7 750	30 417	2 165	3 037
Luxembourg	255 889						13 006		
Hungary	2 596 236	178 101	32 493	145 608	50 757	26 681	90 593	3 885	6 185
Malta	134 212	21 778	10 732	11 046	3 205	8 093	8 231		1 439
Netherlands	5 461 062						304 288	8 975	23 241
Austria	2 742 655	349 010	129 078	218 932	48 465	112 025	172 817	3 964	11 739
Poland	8 652 063	354 401	90 093	264 308	100 978	70 796	153 020	10 339	19 268
Portugal	3 007 264		69 628			59 357	205 666	4 798	11 308
Romania	3 898 199	222 259	54 728	167 531	58 150	41 564	108 949	3 066	10 530
Slovenia	591 340					10 257	22 629	499	2 117
Slovakia	1 502 912	70 925	12 848	58 077	14 327	9 762	42 107	1 558	3 171
Finland	1 454 614		97 787			11 056	48 243	1 408	4 903
Sweden	3 102 078	260 370	66 079	194 291	54 513	50 415	140 481	3 088	11 873
United Kingdom	19 209 717	2 288 025	45 408	1 09 689	46 401	436 709	1 434 005	43 116	95 554
Norway	1 510 874	155 097	85 154			34 341	65 730	1 777	6 848
Switzerland	2 737 721					65 121	114 413		13 720
Former Yugoslav Republic of Macedonia									
Bosnia and Herzegovina	479 889			32 552	8 316		25 631	314	795

Note: Tourism aggregates estimated using available data and including 2014 data for some countries. Due to unreliable data at country level, the use of 2014 data instead of 2015, and rounding, deviations can occur between total and subtotals.
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 (†) NACE classes: H491, H4932, H4939, H501, H503, H511, H515, H52, H53, H561, H563, N771, N7721 and division N79. Country data does not include the following NACE classes: H491 for BG, DE and EL; H4932 for ES; H501 for CY.
 (‡) NACE classes: H511, H515, H52, H53 and N791.
 (¶) NACE classes: H491, H4932, H4939, H501, H503, H51, H515, H53, N771, N7721 and N799. Country data does not include the following NACE classes: H491 for BG, DE and EL; H4932 for ES; H501 for CY.
 (‡) NACE classes: H491, H4932, H4939, H501, H503 and H511. Country data does not include the following NACE classes: H491 for BG, DE and EL; H4932 for ES; H501 for CY.
 (¶) NACE classes: H511 and H53.
 (†) NACE classes: H51 and H53.
 (‡) NACE classes: N771 and N7721.
 (¶) 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)

eurostat

Table 4: Number of persons employed, 2015 - Source: Eurostat (sbsnascar2), (sbsna1aser2)

The availability of country data on turnover and value added is very fragmented (see Table 5, Table 6). Turnover amounted to EUR 240 billion for the United Kingdom, followed by France (144 billion) and Germany (142 billion, excluding passenger rail transport interurban).

Turnover or gross premiums written, 2015 (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⁾	Accommodation (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) ⁽⁹⁾
EU-28	27 207 203	1 038 461	488 557	569 904	272 441	175 293	348 572	73 574	170 482
Belgium	889 197	3 085	1 131	1 488	587	2 504	10 036	4 602	5 438
Bulgaria	121 308	8 821	1 597	1 488	1 706	1 075	788	121	514
Czech Republic	479 454	142 352	75 629	66 723	29 614	28 244	44 413	9 647	30 434
Denmark	6 061 400	47 046	50 412	88 582	37 301	24 758	57 286	11 822	13 227
Germany	595 084	4 767	694	1 569	1 541	143	521	143	521
Estonia	50 820	17 180	8 803	8 376	4 101	5 203	5 352	563	1 965
Ireland	239 153	97 457	47 046	50 412	16 620	19 855	37 734	4 898	18 350
Greece	1 789 292	3 624 869	144 394	55 812	88 582	37 301	24 758	57 286	11 822
France	77 670	2 887 615	115 150	43 748	71 401	28 174	22 439	46 840	6 372
Italy	25 573	2 091	1 010	1 081	69	932	956	58	77
Cyprus	51 304	1 505	662	1 081	188	188	476	90	284
Latvia	73 987	1 505	662	1 081	280	211	522	158	334
Lithuania	151 365	7 481	3 424	4 057	2 849	1 043	2 077	616	896
Hungary	18 665	1 761	1 235	527	565	495	555	158	306
Malta	1 412 433	32 786	17 268	15 977	6 797	8 785	8 343	3 888	4 964
Netherlands	653 111	15 481	6 710	8 771	3 994	2 652	4 539	1 384	2 911
Austria	921 350	314 227	9 079	8 771	3 994	2 652	4 539	1 384	2 911
Poland	314 227	263 366	6 017	2 479	3 538	1 529	1 002	2 148	391
Portugal	263 366	83 628	2 431	1 131	1 300	403	544	981	84
Romania	83 628	180 476	2 626	949	1 677	341	364	1 140	238
Slovenia	180 476	365 762	5 514	5 514	3 871	1 340	3 871	662	1 471
Slovakia	365 762	808 926	30 069	13 926	16 143	8 041	4 648	9 740	891
Finland	808 926	4 348 297	239 864	119 220	120 644	57 315	31 087	73 094	20 660
Sweden	4 348 297	546 504	20 572	11 444	9 128	8 114	3 115	4 317	673
United Kingdom	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694
Norway	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694
Switzerland	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694	1 929 694
Former Yugoslav Republic of Macedonia	17 448	17 448	17 448	17 448	17 448	17 448	17 448	17 448	17 448
Bosnia and Herzegovina	21 125	21 125	21 125	21 125	21 125	21 125	21 125	21 125	21 125

Table 5: Turnover or gross premiums written, 2015 (in million EUR) - Source: Eurostat (sbsnascar2), (sbsna1aser2)

Value added at factor cost, 2015 (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⁾	Accommodation (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) ⁽⁹⁾
EU-28	7 033 142	398 256	145 535	252 721	99 695	84 258	140 444	41 036	32 823
Belgium	201 517	2 454	436	473	139	344	300	70	55
Bulgaria	23 019	909	436	473	139	344	300	70	55
Czech Republic	90 633	2 600	436	473	139	344	300	70	55
Denmark	139 144	14 430	21 005	21 005	6 066	10 296	14 356	2 606	2 112
Germany	1 568 030	55 179	22 642	32 537	8 494	14 030	20 147	5 496	7 013
Estonia	10 617	5 637	3 620	2 017	1 440	3 776	784	275	362
Ireland	178 466	35 436	14 430	21 005	6 066	10 296	14 356	2 606	2 112
Greece	47 104	54 678	17 170	37 509	14 037	9 435	23 433	5 865	1 909
France	458 626	35 436	14 430	21 005	6 066	10 296	14 356	2 606	2 112
Italy	916 308	54 678	17 170	37 509	14 037	9 435	23 433	5 865	1 909
Croatia	21 210	1 999	1 181	28 492	9 476	10 010	16 222	3 119	1 476
Spain	669 323	40 303	11 811	28 492	9 476	10 010	16 222	3 119	1 476
Cyprus	7 244	1 104	594	510	37	540	441	33	54
Latvia	10 579	466	157	157	53	100	186	91	38
Lithuania	15 707	466	157	157	53	100	186	91	38
Hungary	22 761	2 134	1 015	1 119	868	422	487	277	81
Malta	5 109	555	369	186	132	223	223	51	59
Netherlands	331 777	13 121	5 500	7 524	2 566	4 444	5 873	1 616	536
Austria	176 330	5 043	1 851	3 191	1 633	1 130	1 255	736	288
Poland	187 993	5 043	1 851	3 191	1 633	1 130	1 255	736	288
Portugal	72 987	2 685	1 131	1 131	37	540	441	33	54
Romania	54 524	791	311	491	147	249	326	22	47
Slovenia	19 333	952	207	745	414	132	250	88	67
Slovakia	33 919	952	207	745	414	132	250	88	67
Finland	89 756	1 065	1 065	1 065	416	1 376	275	188	188
Sweden	222 749	9 855	3 190	6 764	2 729	1 997	4 163	407	659
United Kingdom	4 407 750	102 679	41 750	60 919	21 293	17 587	34 226	13 811	15 753
Norway	192 024	6 892	2 306	4 585	3 153	1 246	1 803	311	378
Switzerland	356 368	6 892	2 306	4 585	3 153	1 246	1 803	311	378
Former Yugoslav Republic of Macedonia	3 740	3 740	3 740	3 740	3 740	3 740	3 740	3 740	3 740
Bosnia and Herzegovina	7 169	7 169	7 169	7 169	7 169	7 169	7 169	7 169	7 169

Table 6: Value added at factor cost, 2015 (in million EUR) - Source: Eurostat (sbsnascar2), (sbsna1aser2)

For the United Kingdom, value added amounted to EUR 103 billion while the highest shares of value added in the tourism industries in the total non-financial business economy of the country were observed in Cyprus, Greece and Malta (all above 10 %).

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 to 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-28, for the years 2005 to 2017, the quarterly evolution of the turnover, seasonally adjusted or working days adjusted, for the above mentioned tourism industries (index: average 2015 = 100). The graph shows an upward trend that was only interrupted from the first quarter of 2009 until mid-2010 (start of the worldwide financial turmoil).

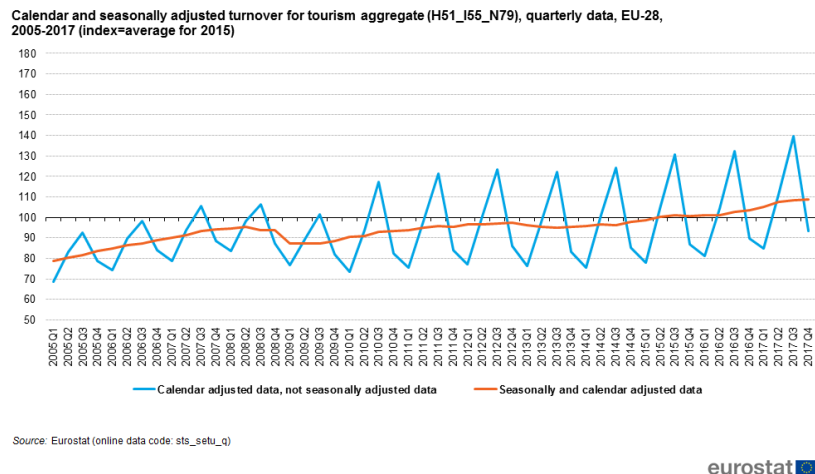


Figure 3: Calendar and seasonally adjusted turnover for tourism aggregate (H51I55N79), quarterly data, EU-28, 2005-2017 (index=average for 2015) - Source: Eurostat (stssetuq)

Figure 4 shows for the EU-28, for the period January 2007 to November 2017, the monthly evolution of the working days adjusted turnover in 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).

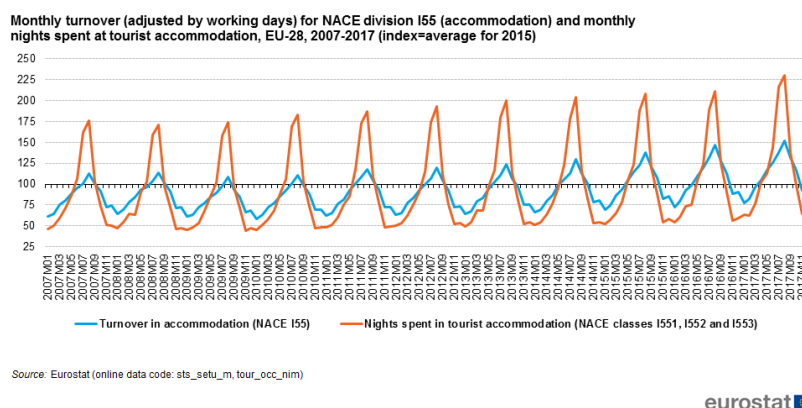


Figure 4: Monthly turnover (adjusted by working days) for NACE division I55 (accommodation) and monthly nights spent at tourist accommodation, EU-28, 2007-2017 (index=average for 2015) - Source: Eurostat (stssetum), (touroccnim)

Figure 5 shows, for the years 2005 to 2017, the quarterly working days adjusted turnover for the above mentioned group of tourism industries for two countries: Croatia, which presents the highest seasonality in terms of turnover and Finland which has the lowest seasonality.

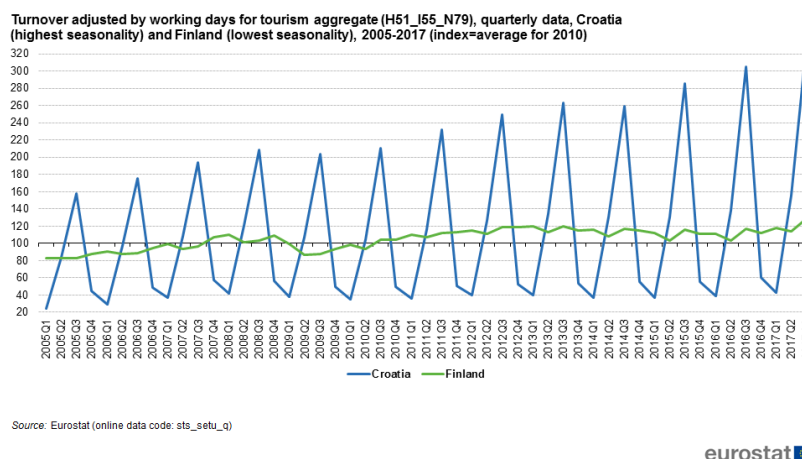


Figure 5: Turnover adjusted by working days for tourism aggregate (H51I55N79), quarterly data, Croatia (highest seasonality) and Finland (lowest seasonality), 2005-2017 (index=average for 2010) - Source: Eurostat (stssetuq)

Source data for tables and graphs

- [Tourism industries-economic analysis graphs and tables](#)

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 7. All these activities are covered by SBS, except for culture, sports and recreation.

List of tourism industries

UNWTO tourism industries	ISIC Rev.4(*)	NACE Rev.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	6820	Renting and operating of own or leased real estate (*)
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
	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	-	-	-

(*) Source: IRTS 2008 - Annex 3, p. 111 (http://unstats.un.org/unsd/publication/SeriesM/SeriesM_83rev1e.pdf)

(*) Source: conversion table ISIC Rev.4 - NACE Rev.2 (<http://unstats.un.org/unsd/cr/reqistr/regso.asp?Ci=70>)

(*) Activities omitted in the current article.

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Table 7: 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 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 7. 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).

Context

[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](#) </noprnt>

Publications

- [Recent Eurostat publications on tourism](#) </noprnt>

Main tables

- [Tourism \(ttour\)](#) , see:

Monthly data on tourism industries (ttourindm)

Annual data on tourism industries (ttourinda)</noprnt>

Database

- [Tourism \(tour\)](#)

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.
- [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.