

Statistics in focus

INDUSTRY, TRADE AND SERVICES

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Hotels, restaurants and cafés Micro-enterprises dominate the sector

Joachim Hubertus

Hotels, restaurants and cafés (Horeca) make up an important service sector in European economies, with considerable potential for growth in most countries. The Horeca sector includes mainly: hotels, restaurants, cafés, pubs and bars, camping sites, canteens and catering services.

In 1996, some 1.4 million enterprises in this sector directly employed more than 6.5 million people in the European Union (EU). These figures represent about 7.7 % of total EU enterprises and 5.8 % of total EU employment. Between 1993 and 1996, there was an increase of about 3.9 % in the number of enterprises, 7.6 % in employment and 5.9 % in turnover. Tourism activities play the key role in this sector. They provide supplementary incomes, create employment, contribute to infrastructural and regional development and, in broader terms, help foster integration both within Europe and between Europe and the rest of the world. The demand for tourism activities is rising continuously, even in the main destination countries, e.g. France, Spain and Italy.

This edition of *Statistics in Focus* shows that, despite a falling number of enterprises in many Member States and an increase in size and capacity, it is still the small and medium-sized enterprises (SMEs) which dominate Horeca services.

The Horeca sector in the EU

Largest number of enterprises in Spain and Germany

	Number of enterprises	% of total	Employment	% of total	Turnover (ECU millions)	% of total	Persons employed per enterprise
EU-15	1 412 987	100.0	6 544 710	100.0	278 706	100.0	4.6
EUR-11	1 146 173	81.1	4 755 060	72.7	189 903	68.1	4.1
B	54 253	3.8	206 168	3.2	6 499	2.3	3.8
DK	11 545	0.8	79 724	1.2	3 293	1.2	6.9
D	270 737	19.2	1 274 830	19.5	51 625	18.5	4.7
EL	:	:	:	:	:	:	:
E	259 594	18.4	915 519	14.0	29 334	10.5	3.5
F	191 281	13.5	811 510	12.4	38 934	14.0	4.2
IRL	:	:	:	:	:	:	:
I	211 796	15.0	736 708	11.3	33 164	11.9	3.5
L	:	:	:	:	:	:	:
NL	40 197	2.8	303 429	4.6	:	:	7.5
A	37 688	2.7	188 102	2.9	8 450	3.0	5.0
P	64 705	4.6	213 990	3.3	4 432	1.6	3.3
FIN	9 544	0.7	43 524	0.7	3 458	1.2	4.6
S	10 256	0.7	70 008	1.1	4 685	1.7	6.8
UK	148 860	10.5	1 484 014	22.7	52 220	18.7	10.0

Source: Eurostat — SME database

Table 1: Horeca sector in 1996 — Number of enterprises, employment and turnover

In 1996, around 6.5 million people in the EU worked in about 1.4 million enterprises in the Horeca sector, generating a global turnover of some ECU 280 000 million (Table 1). With 81 % of the total number of enterprises in this sector in the EU (73 % of employment and 68 % of turnover), there is a major concentration in the Eurozone (EUR-11) with Germany, Spain, France and Italy accounting for the largest national shares.



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The UK is the most important Member State outside Monetary Union, and within the EU as a whole for employment and turnover. Spain (high figure for enterprises, low for turnover) and the UK (highest turnover and employment, but relatively few enterprises) are an example of how Horeca can be organised in different ways, particularly with regard to concentration. Whereas, in the UK, enterprises employ an average of 10 persons, in Spain (as in Portugal, Italy and Belgium) they employ fewer than four. Among other possible factors, the specific characteristics of tourism and business travel, and the presence of multinational accommodation chains in these countries may be the reasons for this (see also the analysis of the Horeca sector by size class).

**A sector breakdown shows:
Restaurants dominate the Horeca services**

With an average share of between 44 % and 50 % for all variables (even higher for the Nordic countries), restaurants represent the most important part of Horeca services in the EU.

Bars and cafés also rank high in several countries (e.g. Portugal, Belgium and the Netherlands), at least in terms of the number of businesses. However, their importance varies from country to country, and they are less important in Austria and Finland. Figures for hotels average about 7 % for the number of enterprises, 23 % for employment and 26 % for turnover. They are particularly dominant in Austria, France and Sweden. Canteens and catering are less important (an exception is Finland), but are remarkable in some countries in terms of turnover. Camping sites cover rather small activities: their relative percentages are normally below 5 %, except in the Netherlands, where they are somewhat higher. Figures 1 to 3 show the relative weight of Horeca activities (by NACE 3-digit level; see methodological notes) for the countries which provide the relevant data.

Figure 1: Horeca 1996 — Number of enterprises broken down by NACE group

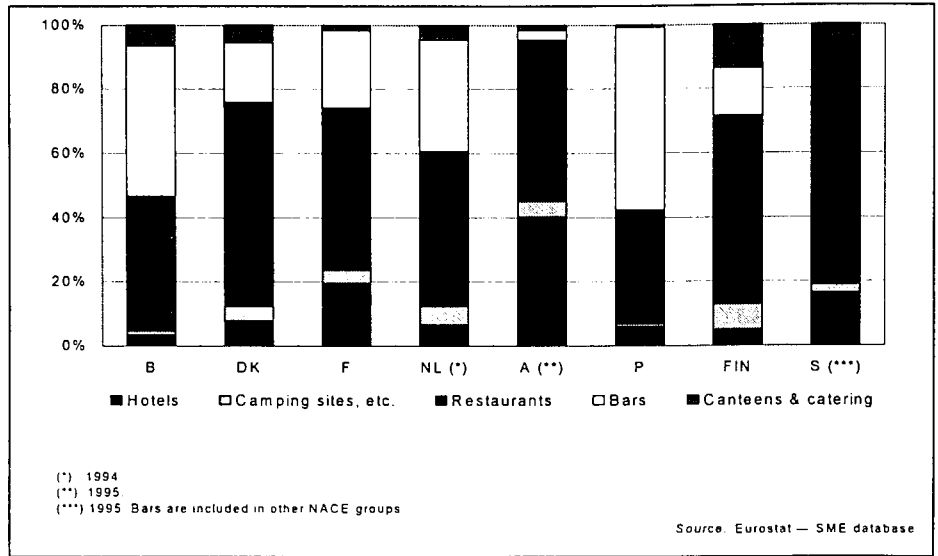
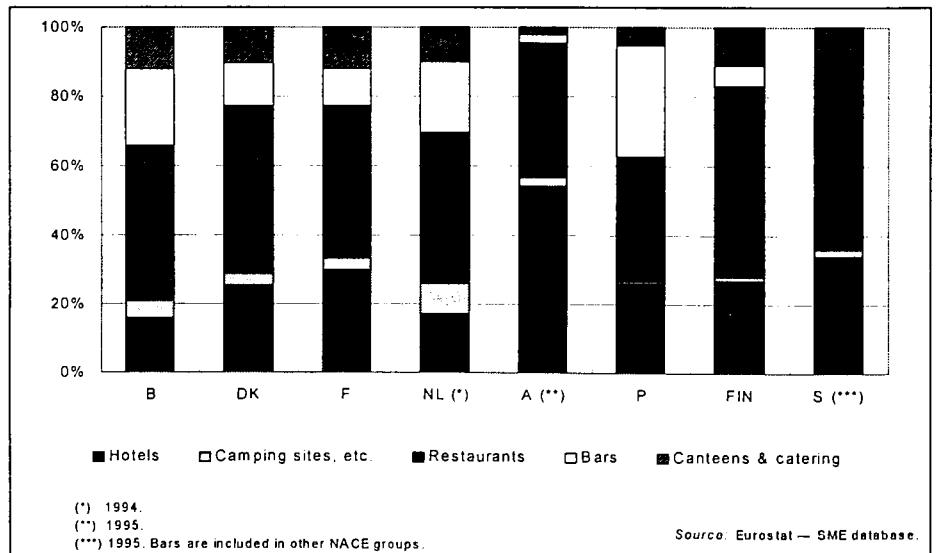


Figure 2: Horeca 1996 — Employment broken down by NACE group



Figure 3: Horeca 1996 — Turnover broken down by NACE group



In hotels and catering services, the average enterprise is generally larger (15 and 11 persons employed respectively) than for the other

Horeca activities (fewer than 5). A similar distinction between these two groups can be made regarding turnover per enterprise: hotels and

catering services have more industry-oriented structures, while restaurants and bars are often small (family) businesses.

Austria and Spain well above EU averages with regard to the share of Horeca in the economy

In 1996, the Horeca sector represented around 7.7 % of total enterprises, 5.8 % of total employment and 1.6 % of total turnover in the EU (Table 2). As regards the shares in the total number of enterprises, Austria (16 %), followed by Spain, Belgium, Germany and Portugal (all around 10 %) are all well above the EU average. Spain and Austria also record the highest employment shares (about 8 %) followed by the UK and Portugal. The situation is similar for the share in turnover: Spain (2.5 %) and Austria (2.4 %) stand out, followed by Portugal (2.1 %) and Italy (2.0 %). These figures, particularly the different shares in enterprises, employment and turnover which Horeca services account for in the various countries, demonstrate how diverse the structure of the Horeca sector is throughout Europe. Economic and geographic position, country size and climate, tourist and historic traditions may explain national differences in the importance of the Horeca sector. Tourism plays a bigger role in the economy of Spain and Portugal, which have traditionally been popular tourist destinations, than, for example, Italy, France and Germany, where manufacturing or other service industries may predominate.

Positive evolution in the EU between 1993 and 1996

Between 1993 and 1996, most EU Member States recorded rising employment and turnover figures, although the situation was different for the number of enterprises

(Table 3). The figure for EU-15 shows a growth in the number of enterprises (3.9 %) and an even steeper increase in employment (7.6 %) and turnover (5.9 %). EUR-11 figures are 2.0 %, 4.8 % and 5.3 % respectively. Finland, France and Portugal showed steep rises for all three variables. The United Kingdom and Denmark recorded a

remarkable decrease in the number of enterprises, with rising figures for employment and turnover. Although, once again, there are clear disparities, and certain factors (e.g. updates of registers) may have influenced the picture, a potential for growth and job creation can be discerned in most EU Member States.

Table 2: Horeca sector in 1996
Shares of EU-15 totals for number of enterprises, employment and turnover (%)

	Number of enterprises	Employment	Turnover
EU-15	7.7	5.8	1.6
EUR-11	8.2	5.5	1.6
B	10.5	6.7	1.4
DK	7.1	5.2	1.4
D	10.5	4.4	1.3
EL	:	:	:
E	10.8	8.3	2.5
F	8.2	5.0	1.5
IRL	:	:	:
I	5.6	5.3	2.0
L	:	:	:
NL	7.8	5.4	:
A	16.6	8.0	2.4
P	10.1	7.2	2.1
FIN	4.9	4.0	1.6
S	4.2	3.3	1.2
UK	4.5	7.4	1.1

Source: Eurostat — SME database.

Table 3: Horeca sector — Growth (%) between 1993 and 1996
Number of enterprises, employment and turnover

	Number of enterprises	Employment	Turnover
EU-15	3.9	7.6	5.9
EUR-11	2.0	4.8	5.3
B (¹)	-6.9	-8.8	9.7
DK	-13.6	9.7	8.6
D	-1.3	3.8	-0.2
EL	:	:	:
E	4.0	5.5	2.3
F	15.5	15.7	16.9
IRL	:	:	:
I	-3.6	-8.9	2.9
L	:	:	:
NL	-0.6	14.4	:
A	:	:	:
P	7.7	16.0	24.2
FIN	12.8	11.6	40.7
S	5.4	3.9	17.1
UK	-7.5	17.5	6.8

(¹) Reference years are 1994 and 1996.

Source: Eurostat — SME database.

SMEs with 1-9 employees are dominant

In the EU, Horeca activities are performed mainly by small or medium-sized enterprises. The EU-15 figure for 1996 shows that 94.4 % of enterprises had fewer than 10 employees, businesses with fewer than 50 accounted for 74.2 % of employment, and 80.7 % of turnover was generated by enterprises employing fewer than 250 employees (Figure 4). However, 0.1 % of large firms employ 17.2 % of the total workforce and produce 19.3 % of total turnover. Still, SMEs are more important in Horeca than in other economic sectors. In Horeca, they account for 83 % of employment, whereas the figure for the total economy is only 66 % (the corresponding turnover figures are 80 and 55 % respectively).

The role of the 1-9 employee size class, accounting for about 40 % of total employment and turnover and more than 50 % of enterprises in the sector, is particularly noteworthy, as many of these SMEs are traditional family businesses.

Table 4 confirms the overall picture of the crucial role of SMEs in Horeca throughout Europe. It gives an overview of SME size classes by country and at EU level. The UK shows a specific pattern, with large enterprises accounting for about 42 % of employment and 45 % of turnover. These figures are mainly due to the role of multinational accommodation chains and tour operators, the strong concentration of some large food-service companies, the national business and financial systems and the relative concentration of the main tourist sites. Finland, Sweden and France are other countries where the role of larger enterprises is not negligible.

Figure 4: Horeca 1996 — Breakdown by size class for EU-15

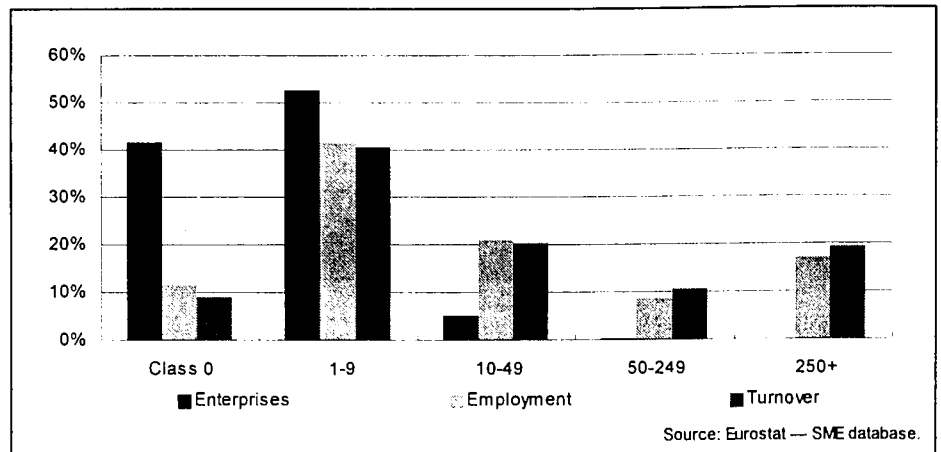


Table 4: Horeca sector in 1996 — Size class breakdown
Number of enterprises, employment and turnover as percentages of the totals

	Size classes					Total (1)
	Class 0	1-9	10-49	50-249	250+	
Number of enterprises						
EU-15	41.7	52.7	5.1	0.4	0.1	1 412 987
EUR-11	41.9	53.0	4.7	0.4	0.0	1 146 173
B	71.6	25.1	3.1	0.2	0.0	54 253
DK	47.7	47.2	4.6	0.4	0.1	11 545
D	32.6	59.2	7.6	0.6	0.0	270 737
EL	..	..	..	..	..	..
E	52.7	43.9	3.0	0.4	0.0	259 594
F	43.9	52.2	3.6	0.2	0.1	191 281
IRL	..	..	..	..	..	..
I	47.0	48.9	3.9	0.2	0.0	211 796
L	..	..	..	..	..	..
NL	35.5	59.1	4.7	0.6	0.1	40 197
A	31.8	59.6	8.0	0.6	0.0	37 688
P	1.2	94.4	3.9	0.4	0.1	64 705
FIN	43.9	50.5	4.8	0.6	0.2	9 544
S	37.9	49.8	11.1	1.1	0.1	10 256
UK	36.2	52.2	10.4	1.0	0.2	148 860
Employment						
EU-15	11.7	41.5	21.0	8.6	17.2	6 544 710
EUR-11	13.3	46.9	21.6	8.4	9.8	4 755 060
B	28.2	43.7	16.2	4.4	7.5	206 168
DK	11.0	49.1	24.2	8.2	7.5	79 724
D	6.9	46.8	27.5	9.3	9.5	1 274 830
EL	..	..	..	..	..	..
E	22.4	41.3	17.9	10.1	8.3	915 519
F	17.4	45.0	18.8	5.5	13.3	811 510
IRL	..	..	..	..	..	..
I	11.8	55.2	18.9	5.5	8.6	736 708
L	..	..	..	..	..	..
NL	9.6	49.4	20.0	11.4	9.6	303 429
A	8.8	45.6	30.2	10.8	4.6	188 102
P	0.5	60.6	20.2	10.1	8.6	213 990
FIN	7.1	32.8	19.6	11.9	28.6	43 524
S	6.9	32.3	29.3	14.9	16.6	70 008
UK	4.9	23.9	19.6	9.3	42.3	1 484 014
Turnover						
EU-15	9.0	40.8	20.2	10.7	19.3	278 706
EUR-11	10.6	42.4	21.9	11.2	13.9	189 903
B	29.5	30.7	18.6	7.2	14.0	6 499
DK	14.8	41.6	24.9	10.7	8.0	3 293
D	5.9	45.8	26.0	11.7	10.6	51 625
EL	..	..	..	..	..	..
E	14.7	32.0	15.2	21.0	17.1	29 334
F	11.1	43.8	20.8	7.0	17.3	38 934
IRL	..	..	..	..	..	..
I	13.0	47.5	21.1	6.9	11.5	33 164
L	..	..	..	..	..	..
NL	..	..	..	..	..	..
A	7.3	43.3	31.1	12.1	6.2	8 450
P	0.4	52.7	21.4	14.2	11.3	4 432
FIN	7.7	34.6	20.7	11.2	25.8	3 458
S	8.1	25.0	33.2	17.3	16.4	4 685
UK	3.1	25.4	17.0	9.0	45.5	52 220

(1) Totals: number of enterprises=unit.
Employment = total number of persons employed.
Turnover = ECU millions.

Source: Eurostat — SME database.

Focus on hotels

Fewer hotels, more bed places

Between 1994 and 1998, the number of registered hotels and similar establishments in the EU decreased slightly, from around 188 000 to 185 000 (Table 5) with the Eurozone (EUR-11) accounting for 69 % of the total. Four of the fifteen EU Member States together account for more than 75 % of the EU total: the UK (26 %), Germany (21 %), Italy (18 %) and France (11 %).

At EU level, rates of growth in the number of establishments between 1994 and 1998 were slightly negative (EU-15: -1.5 %, EUR-11: -3.0 %). However, many countries registered positive growth (the highest being in Greece, at 4.5 %) over the period. The overall negative trend is due to the extremely steep decline in Spain (-25.1 %) and to smaller declines in other countries (e.g. Austria, Italy). These data show different market phases: some marked by a clear expansion of new firms, others by a reorganisation and concentration of existing enterprises. The impressive growth of tourism in Spain during the past decades, for example, was characterised, first, by the creation of a great number of new small enterprises, while, in a second phase, there has been an increase in the presence of national and multinational hotel chains and in the number of mergers, acquisitions and other market concentration processes. To a lesser extent, this may also apply to other countries.

The number of bed places in hotels and similar establishments rose during the observation period by 4.4 % at EU-15 level (EUR-11: +3.6 %) to more than 9 million in

Table 5: Trends in the number of hotels and similar establishments, 1994-98

	Number of hotels and similar establishments		Growth rate (%)
	1994	1998	1994-98
EU-15	188 413	185 605	-1.5
EUR-11	131 723	127 708	-3.0
B	1 946	1 998	2.7
DK	:	:	:
D	37 307	38 914	4.3
EL	7 604	7 946	4.5
E	10 063	7 539	-25.1
F	19 645	19 555	-0.5
IRL	5 034	5 164	2.6
I	34 549	33 828	-2.1
L	372	342	-8.1
NL	:	:	:
A	18 402	15 780	-14.2
P	1 728	1 754	1.5
FIN	951	978	2.8
S	1 855	1 891	1.9
UK	46 666	47 532	1.9

NB: IRL, I: 1997 instead of 1998.
EU aggregates estimated.

Source: Eurostat — Tour database.

Table 6: Hotels and similar establishments
Trends in the number of bed places (thousands) 1994-98

	Number of bed places		Growth rate (%)
	1994	1998	1994-98
EU-15	8 685	9 064	4.4
EUR-11	6 859	7 108	3.6
B	109	116	6.9
DK	:	:	:
D	1 381	1 548	12.1
EL	508	585	15.0
E	1 053	979	-7.0
F	1 380	1 451	5.2
IRL	100	107	7.4
I	1 724	1 772	2.8
L	15	15	0.0
NL	:	:	:
A	650	585	-10.0
P	202	216	6.5
FIN	106	112	5.6
S	174	185	6.4
UK	1 045	1 097	5.0

NB: IRL, I: 1997 instead of 1998.
EU aggregates estimated.

Source: Eurostat — Tour database.

1998 (Table 6); 7.1 million (78 %) are located in the Eurozone. Spain and Austria are the only countries with negative growth rates.

The trend towards fewer establishments with rising capacities and greater concentration is also confirmed for the hotel sector.

In 1998, the EU as a whole has counted around 400 million arrivals (residents and non-residents) in hotels and similar establishments. France, Germany and Italy accounted for the highest figures. Most countries showed increases in the total number of hotel arrivals between 1993 and 1997.

**Hotel arrivals of non-residents:
France ahead**

Non-resident arrivals in hotels and similar establishments are most numerous in France, followed by Italy, Spain and the UK (Figure 5). Trends over the observation period (1994-98) show steep increases for Spain and the UK (7.2 %), followed by Portugal (6.9 %) and Italy (6 %) for this variable. Various factors, such as monetary exchange rates, economic expansion or political factors (Balkan crisis) may influence hotel arrival figures in certain countries.

Comparing nights spent per inhabitant across Member States in 1998, Austria shows the highest figure followed by Greece, Ireland, Spain and Italy.

Nights spent by non residents represent the lion's share for these countries, except for Italy where residents spent more nights than non residents. Germany, France and the Nordic countries show the same pattern as Italy (Figure 6).

Figure 5: Hotels and similar establishments
Non-resident arrivals: 1998 level and 1994-98 average annual growth rates

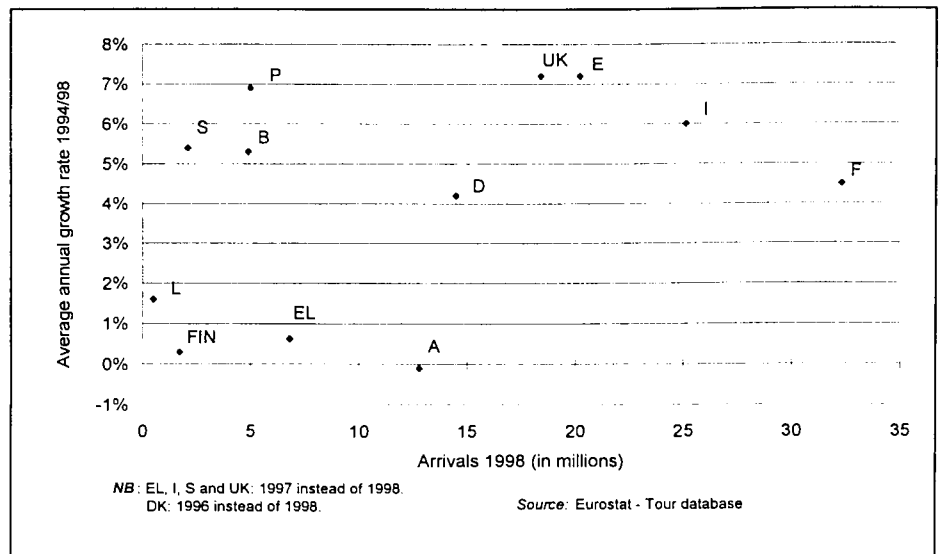
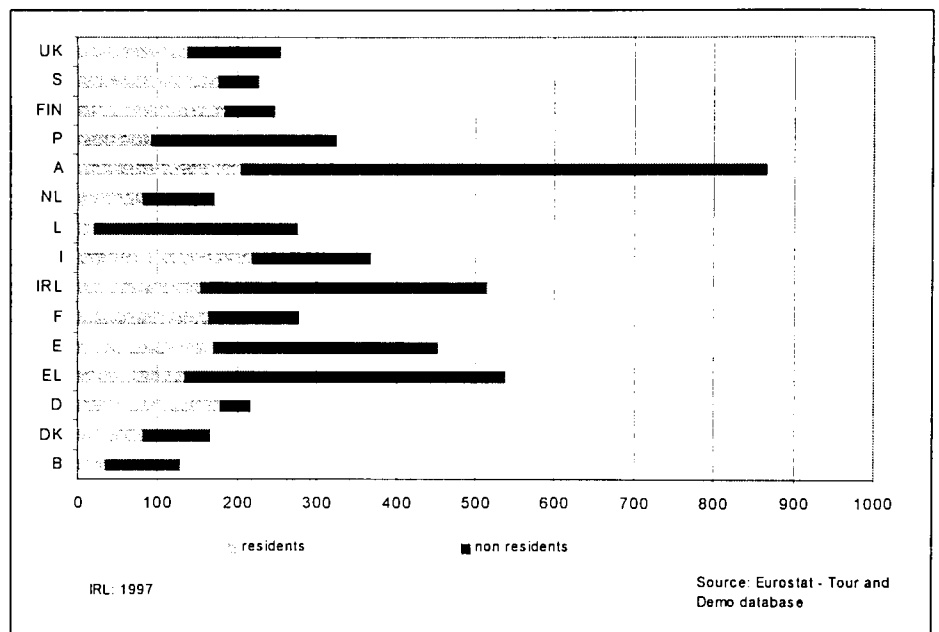


Figure 6: Hotels and similar establishments:
Nights spent (1000) by residents and non-residents per 100 000 inhabitants in 1998



➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The **SME database** covers the main economic indicators (variables) for small and medium-sized enterprises. The data are provided by the Member States on a voluntary basis. They are broken down by standardised size classes and economic activities according to the statistical classification NACE Rev. 1.

• Variables — SME database

Number of enterprises

A count of the number of enterprises registered to the population concerned in the business register. The enterprise is defined as the smallest combination of legal units that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making.

Number of persons employed

The total number of persons who work in the observation unit (employees receiving remuneration, working proprietors and unpaid family workers) as well as outside working persons who belong to the unit and are paid by it. It includes all persons who are on the payroll of the enterprise, whether they are temporarily absent (excluding long-term absences), part-time, seasonal or home workers, apprentices etc. The number of persons employed excludes manpower supplied to the unit by other enterprises and persons carrying out repair and maintenance work in the enquiry unit on behalf of other enterprises.

Turnover

Turnover comprises the totals invoiced by the observation unit during the reference period, which corresponds to market sales of goods or services supplied to third parties. It includes all duties and taxes on the goods and services invoiced by the unit, with the exception of the VAT invoiced by the unit vis-à-vis its customers and other similar deductible taxes directly linked to turnover.

All EU aggregates in the SME database are estimated.

• Statistical classification of economic activities (NACE Rev. 1)

The analysis covers Section H — division 55 'Hotels and restaurants' of NACE Rev. 1, which is broken down into the following groups:

- 55.1: Hotels: Provision of short-stay lodging e.g. hotels, motels, inns
- 55.2: Camping sites and other provision of short-stay accommodation: Provision of short-stay lodging e.g. holiday camps, chalets, flats camping space, farm houses, youth hostels etc.
- 55.3: Restaurants: sales of meals and drinks for consumption on the premises including self-service, take-away and fast food restaurants etc.
- 55.4: Bars: sales of drinks for consumption on the premises possibly accompanied by entertainment e.g. public houses, night-clubs, beer halls etc.
- 55.5: Canteens and catering: sales of meals and drinks at reduced prices to a group of clearly defined persons linked by ties of a professional nature (canteens); catering activities are activities of supplying meals in a central food preparation unit for consumption on other premises e.g. airlines, 'meals on wheels', weddings, parties etc.

• Definition of the size classes

Commission Recommendation No 96/280/EC of 3 April 1996 concerning the definition of small and medium-sized enterprises, distinguishes SMEs from large enterprises thus:

- fewer than 250 persons employed,
- annual turnover below ECU 40 million, or
- annual balance-sheet total below ECU 27 million, and no more than 25 % of the capital of the enterprise controlled by one or more other enterprises.

The main characteristic of the SME data is their breakdown by employment size classes. The size class boundaries are expressed in terms of employees (salaried employment): sole proprietorships (size class zero, often with only the entrepreneur and family members working) can be separated from the rest of the enterprise population.

The size-classes defined in the SME database are the following:

- *No salaried staff*: 0 employee;
- *Very small enterprises*: 1-9 employees;
- *Small enterprises*: 10-49 employees;
- *Medium-sized enterprises*: 50-249 employees;
- *Large enterprises*: 250 or more employees.

The **Tour database** includes variables on capacity of tourist accommodation establishments, occupancy in these establishments and data on residents' demand for tourism. The data are collected in the frame of Council Directive 95/57/EC of 23 November 1995.

• Variables — Tour database

Hotels and similar establishments

Hotels and similar establishments are typified as being arranged in rooms, in number exceeding a specified minimum; as coming under a common management; as providing certain services including room service, daily bed-making and cleaning of sanitary facilities; examples are:

- hotels: apartment hotels, motels, roadside inns, beach hotels;
- similar establishments: rooming and boarding houses, tourist residences, guest houses, bed & breakfast and farmhouse accommodation.

Number of bed places

The number of bed-places in an establishment or dwelling is determined by the number of persons who can stay overnight in the beds set up in the establishment (dwelling), ignoring any additional beds that may be set up at the customers' request.

Arrivals of residents and non-residents

An arrival (departure) is defined as a person who arrives at (leaves) a collective accommodation establishment or private tourism accommodation and checks in (out). No age limit is applied: children are counted, even where their overnight stays are free of charge. Arrivals are registered by country of residence of the guest and by month.

Nights spent by residents and non-residents

A night spent (or overnight stay) is each night that a guest actually spends (sleeps or stays) or is registered (his/her physical presence there being unnecessary) in a collective accommodation establishment or in private tourism accommodation. Overnight stays are calculated by country of residence of the guest and by month.

Further information:

Databases

NewCronos, Domains SME and Tour

To obtain information or to order publications, databases and special sets of data, please contact the **Data Shop** network:

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