

25 June 2008

Statistics on Products in the Market Services Sector. Year 2006

Turnover for the market services sector increased 8% in the year 2006 as compared with the previous year

Database companies were the most specialised of the IT sector, accounting for more than 88% of their invoicing with the provision of one service

41% of the employees supplied by temporary employment agencies worked in the industrial sector

During the year 2006, turnover for the market services sector increased 8% as compared with the previous year. The Statistics on Products in the Market Services Sector offers specific information on some activity sectors included in the Annual Services Survey.

Annual Services Survey: branches of activity

Main activity	Number of companies	Turnover	
		Year 2006 (millions of €)	% Variation previous year
TOTAL	2,135,630	1,200,295	8.0
Activities analysed in the Statistics of Products	1,330,783	923,292	7.6
Sales and repair of vehicles; retail fuel sales	76,333	121,305	4.8
Wholesale trade and intermediaries	212,313	394,372	6.9
Retail trade and repair of household goods	527,740	206,834	6.7
Hotels and other accommodation (*)	21,000	16,850	7.7
Travel agencies (*)	9,092	17,860	9.2
Railway transport	7	1,831	3.7
Metropolitan transport	3	661	13.1
City and intercity transport by bus	4,326	4,848	9.3
Freight transport by road	133,912	36,352	10.1
Sea transport	234	1,863	11.6
Air transport	69	9,498	12.9
Postal activities	5,893	4,746	3.8
Computer activities	31,715	21,146	16.0
Audiovisual activities	7,852	11,677	5.5
Legal and economic consultancy	161,636	24,969	13.5
Market studies	3,641	1,236	1.6
Technical services	107,197	24,739	20.1
Advertising	25,057	17,807	10.5
Labour recruitment and provision of personnel	2,763	4,700	9.7
Other activities(**)	804,847	277,003	9.4

(*) For these activities, only the main companies have been included in the Statistics on Products

(**) These activities analysed in the Annual Services Survey are not included in the Statistics on Products

Degree of specialisation

The breakdown of turnover by product and activity sector of the clients allows for ascertaining the degree of specialisation of the companies, the services most frequently offered, and the demand for each service carried out by the rest of the sectors.

Database companies were, within the **IT sector**, the most specialised, accounting for 88.5% of their invoicing with the provision of database services and web search engines. In turn, IT equipment consulting companies were the least specialised, obtaining only 51.0% of their turnover for the provision of this service.

IT services: distribution of turnover by product sold

Products	Main activity of the company (%)					
	72.4	72.5	72.1	72.3	72.2	
TOTAL	100.0	100.0	100.0	100.0	100.0	
<i>IT products</i>						
1. Databases and web search engines	72.4	88.5	0.0	0.0	1.7	0.3
2. Maintenance and repair of IT equipment	72.5	0.0	71.1	1.6	0.4	1.7
3. Hardware consultancy services	72.1	0.1	0.9	51.0	0.5	3.7
4. IT facilities management services (outsourcing)	72.3	0.1	2.5	4.5	41.6	6.0
5. Computer programming services	72.2	2.3	2.7	7.6	4.6	40.0
6. Data processing, hosting and related services	72.3	3.4	0.7	1.7	32.0	1.6
7. Hardware consultancy and maintenance	72.2	1.4	3.9	14.8	11.4	25.4
8. Installation services of IT equipment and programs	72.2	0.1	2.2	6.8	3.7	4.1
9. Software publishing	72.2	0.1	0.3	0.0	0.2	3.8
<i>Other products</i>						
10. Manufacture of IT equipment	30.0	0.0	0.5	0.0	0.0	1.7
11. Trade of IT programs and equipment	51/52	3.3	10.7	8.8	1.1	8.3
12. Telecommunications	64.2	0.2	2.7	0.0	0.8	0.7
13. Training	80.4	0.1	0.1	0.7	0.4	0.7
14. Rental of IT equipment without operators	71.3	0.0	0.5	2.5	0.0	1.0
15. Business and management consultancy services	74.14	0.0	0.1	0.0	0.1	0.3
16. Other activities and services		0.4	1.1	0.0	1.5	0.7

72.1 Hardware consultancy services

72.2 Hardware and other IT consultancy services and supply

72.3 Data processing

72.4 Activities related to databases

72.5 Maintenance and repair of office, accounting and IT equipment

Regarding **bus passenger transport** companies, the main service provided was scheduled transport (30.1%), followed by city transport (25.8%) and unscheduled transport (23.2%). These companies presented different degrees of specialisation, depending on their size. Thus, those with 100 employees or more provided, fundamentally, city and scheduled transport services. Conversely, those companies with fewer than 10 employees provided mainly school and unscheduled transport.

City and intercity passenger transport: distribution of turnover by type of transport and number of employees

	0	10	20	30	Number of employees			
					% < 10	10 to 19	20 to 99	100 and more
TOTAL					100.0	100.0	100.0	100.0
City transport					5.9	4.6	7.7	47.4
Scheduled transport					9.5	8.2	35.5	36.5
School transport					31.9	32.0	19.5	2.6
Work transport					6.1	10.5	7.6	1.8
Unscheduled transport					45.7	43.6	27.4	10.2
Other activities					0.9	1.1	2.3	1.5

Products

In the case of companies working in legal consultancy and representation services, the greatest income was generated by the rendering of services in business and trade law (33.2%) and in civil law (30.9%). Meanwhile, criminal defense accounted for 8.5% of turnover in law firms.

Distribution of turnover of legal consultancy and representation

	%
Total	100.0
Criminal law	8.5
Business and trade law	33.2
Labour law	12.0
Civil law	30.9
Other branches of law	15.4

Regarding consultancy firms, the most requested products were those derived from business organisation consultancy (21.7%) and business strategy consultancy (14.7%).

Distribution of turnover for management and business consultancy

	%
Total	100.0
Business organisation consultancy	21.7
Business strategy consultancy	14.7
Financial management consultancy	9.9
Human resource management consultancy	7.8
Public relations consultancy	8.3
Production management consultancy	3.7
Trade management consultancy	8.0
Administration of projects other than construction	3.8
Otros consultancy services for management and business	14.0
Other activities and services	8.1

Demand for services and outsourcing

Subcontracting was a generalised practice among companies dedicated to freight transport by road. **32.5% of the turnover generated by this sector came from operations carried out for clients in the transport sector.** This percentage reached nearly 40% in companies with fewer than 10 employees. The following sectors demanding this service were industry, construction and trade.

Freight transport by road: distribution of turnover by number of employees and activity of the client

	Number of employees (%)				
	TOTAL	Fewer than 10	10 to 19	20 to 99	100 and more
TOTAL	100.0	100.0	100.0	100.0	100.0
Agriculture	5.4	5.9	6.0	4.5	4.7
Industry	24.9	17.1	24.0	30.5	40.9
Construction	18.8	20.7	23.3	19.1	7.3
Trade	10.4	10.1	10.4	9.1	14.0
Accommodation and catering	1.1	0.9	1.0	1.1	2.0
Transport	32.5	39.0	29.8	27.7	22.8
Households	1.1	1.3	0.9	1.0	0.8
Other	5.8	5.0	4.6	7.0	7.5

85.6% of invoicing for IT services came from companies. By sector, those that most used these services were telecommunications, banking and insurance and business services.

Telecommunications companies mostly required consultancy services, banks and insurance companies needed processing, treatment and database services, and business services mainly demanded equipment maintenance.

IT sector: distribution of turnover by activity of the client

	Activity of the company			
	TOTAL	IT consultancy	Processes, treatment and databases	Maintenance of equipment
TOTAL	100.0	100.0	100.0	100.0
PUBLIC SECTOR	13.8	14.5	10.7	10.0
Public Administrations	77.2	75.9	89.2	78.6
Public transport	13.3	14.7	4.8	0.6
Public education	2.2	1.7	1.7	15.2
Public health	7.3	7.7	4.3	5.6
BUSINESS	85.6	85.3	88.5	83.6
Telecommunications	24.5	27.0	15.9	5.2
Banks and insurance companies	19.4	18.7	27.3	14.0
Business services	15.3	13.3	21.3	32.9
Industry	12.1	12.7	7.9	11.0
IT	8.9	8.2	12.1	13.1
Trade	4.5	3.9	2.7	16.2
Other	15.3	16.2	12.8	7.6
Households	0.6	0.2	0.8	6.4

The travel agency and tour operator sector as a whole had companies within their own sector as the main client, and with whom they invoiced almost half of their turnover.

Tour operators obtained 75.4% of their invoicing from the sales made for national travel agencies, while the travellers from the latter mainly came from households (39.3%) and from companies not belonging to the sector (29.0%).

Travel agency and tour operator sector: distribution of turnover by type of client

	TOTAL	Travel agencies	Tour operators
Total	100.0	100.0	100.0
Households	30.3	39.3	2.0
National tour operators	6.4	6.9	4.6
Non-national tour operators	11.6	12.7	8.5
National travel agencies	24.7	8.4	75.4
Non-national travel agencies	4.1	3.1	7.2
Other companies	22.3	29.0	1.6
Public Administrations	0.6	0.6	0.7

Specific variables

The Statistics on Products in the Services Sector offer information on specific variables referring to certain activities that allow for a better knowledge of the sector.

Thus, in the trade sector, it was observed that **non-specialised trade was mainly carried out in larger-sized establishments, whereas specialised trade preferred smaller-sized premises.**

41.2% of the sales in non-specialised retail trade were carried out in establishments measuring more than 2,500 metres square. Conversely, more than three quarters of specialised trade was carried out in establishments measuring less than 400 metres square, with the exception of trade specialised in household furnishings, where this figure was 55.0%.

Retail trade: sales breakdown by size of the establishment (%)

Activity of the company	TOTAL	Less than 400 m ²	400 to 2,499 m ²	2,500 m ² or more
52.1 Non-specialised trade	100.0	16.6	42.2	41.2
52.2 Trade specialised in food, beverages and tobacco	100.0	98.2	1.7	0.1
52.3 Trade specialised in drugstore, perfume store and pharmacy	100.0	98.8	1.2	0.0
52.42 y 52.43 Trade specialised in personal equipment	100.0	76.1	22.6	1.2
52.41-52.44 a 52.46 Trade specialised in furniture and household furnisl	100.0	55.0	29.2	15.8
52.47 y 52.48 Other retail trade	100.0	83.9	12.9	3.2
52.5 Second hand	100.0	87.9	12.1	0.0

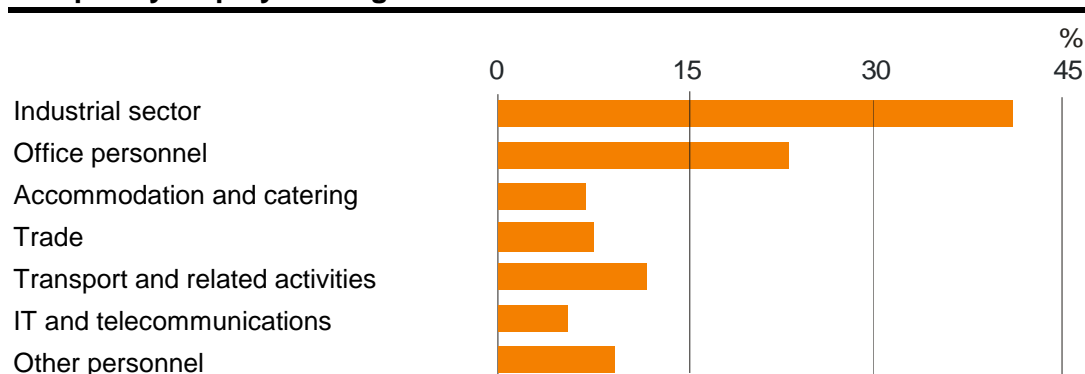
In the case of passenger transport by bus, it is worth noting that the average age of the fleet was seven years. In terms of bus capacity, 71.8% had capacity for fewer than 65 persons.

Passenger transport by bus: fleet

	TOTAL	%
Vehicles by capacity		
TOTAL	49,026	100.0
Fewer than 65 persons	35,230	71.8
65 to 90	8,516	17.4
More than 90	5,280	10.8
Vehicles by age		
TOTAL	49,026	100.0
Up to 5 years	20,057	40.9
5 to 10	17,221	35.1
11 to 15	8,188	16.7
More than 15	3,560	7.3

Finally, temporary employment agencies were estimated to have invoiced 41% of their hours through the supply of personnel to the industrial sector. The following group was the personnel supplied to carry out office tasks, accounting for 20% of the total.

Temporary employment agencies: hours invoiced



Methodological note

The Statistics on Products in the Services Sector, which complement the Annual Services Survey, are structural in nature and are aimed at the companies dedicated to trade, tourism (main companies in accommodation activities and travel agencies), transport (passengers and freight, in each of the modalities), information technologies (IT and audiovisual activities) and services rendered to companies (legal representation, legal and economic consultancy, market studies and opinion surveys, technical services, advertising and labour recruitment and provision of personnel).

The remaining activities, which are not included in the Statistics on Products, although they are included in the Annual Services Survey, include catering, transport by taxi, the activities linked to transport, telecommunications, real estate and rental activities, research and development, investigation and security services, industrial cleaning activities, different business activities, recreational, cultural and sporting activities, and personal services.

These statistics allow for ascertaining the specific characteristics of each of the activities that comprise the services sector, in order to carry out a more precise sectorial analysis that is adapted to each activity. This also serves to complement Annex VIII of Regulation No. 295/2008 of the PE and the Council, referring to structural statistics for companies. This annex contains a detailed module for the structural statistics on business services.

The information that is provided today by these statistics comprises the basis to ascertain the most frequently requested services in each of the sectors, and for which, the Services Sector Price Indices are compiled from the perspective of the producer.

For further information see INEbase-www.ine.es/en/welcome_en.htm All press releases at: www.ine.es/en/prensa/prensa_en.htm

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