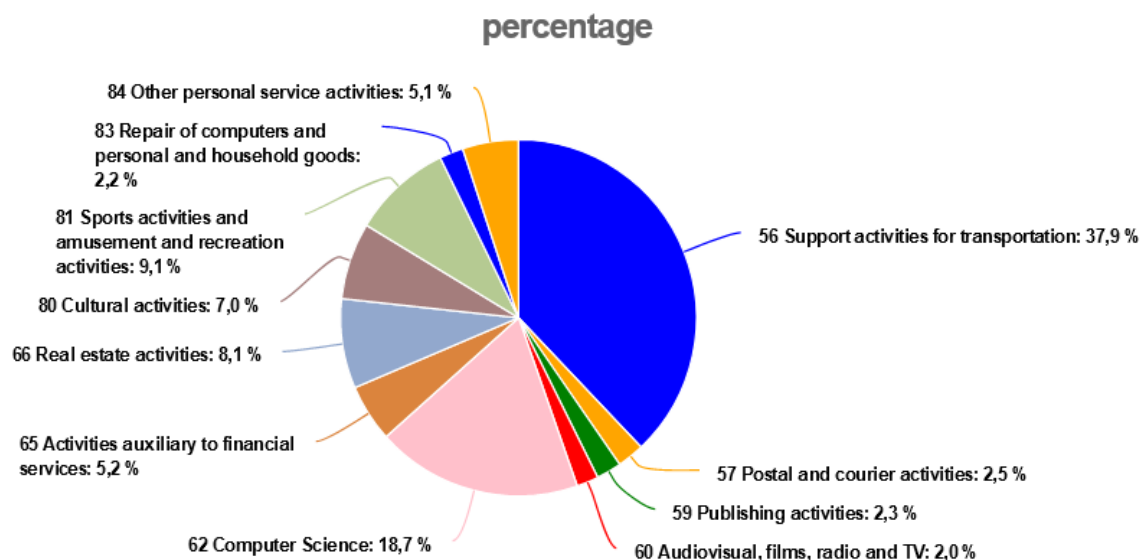


Turnover in the Sundry Services sector stood at 7,730 million in 2020, down 11.8% on 2019

Cultural Activities (-49.7%) and Audiovisual Activities, Cinema, Radio and Television (-27.9%) were the hardest hit by COVID-19 in terms of turnover

In 2020, the year the COVID-19 pandemic began and the most restrictive measures were imposed on economic activity, turnover of establishments in the **Sundry Services sector** stood at 7,730 million euros, down 11.8% on the previous year, according to Eustat data.

≡ Division of turnover within the Sundry services sector of the Basque Country. 2020



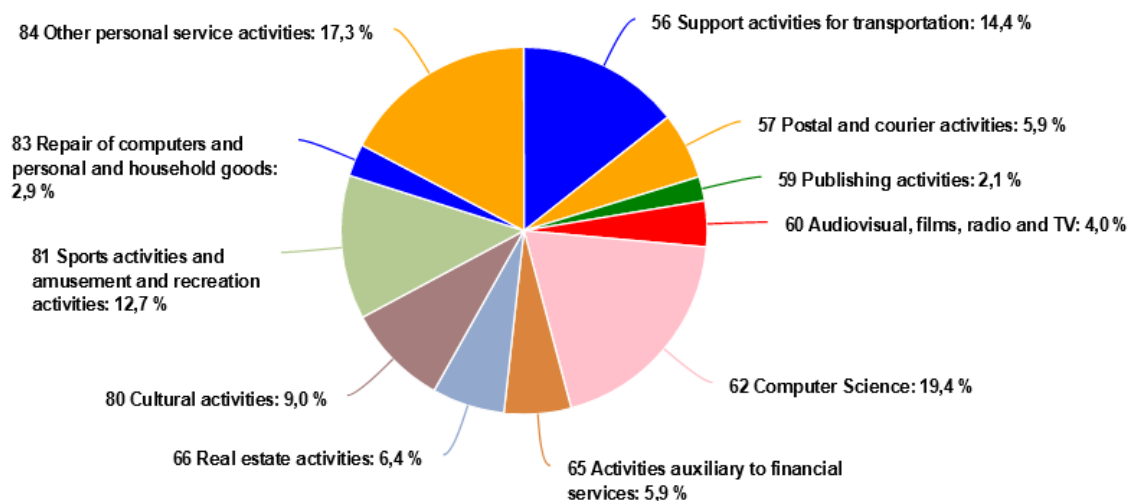
Source: Eustat. Services survey

In contrast, the number of establishments rose slightly, by 2%, making a total of 23,537, while the number of people employed increased by 1.5%, representing 81,370 workers, 8.5% of total employment in the Basque economy for 2020.



Division of personnel employed within the Sundry services sector of the Basque Country. 2020

percentage



Source: Eustat. Services survey

The value added generated by establishments in the Sundry Services sector reached 4,087 million euros, a decline of 7.9%.

Analysis by Division

Ancillary Transport and Computing were the only branches to register a clearly positive performance, with significant increases in employment and even sales

A very heterogeneous group of activities is included under Sundry Services. In terms of sales volume, the divisions that stood out were **Ancillary Transport Activities** and **Computing**. With turnover of 2,932 million euros for the former, 37.9% of the total for this sector, and 1,446 million euros for the latter, 18.7%, between them they accounted for 56.6% of total turnover, but only represented 33.8% of jobs and 13.5% of establishments in the Sundry Services sector.

Ancillary Transport Activities employed 11,704 people at just over 1,000 establishments (1,063), while the 2,118 establishments in Computing provided a total of 15,791 jobs in 2020. In fact, these two divisions were the only ones to maintain and even slightly improve their sales figure in 2019, which was up 0.8% in both cases. Furthermore, employment figures rose by 7.3% in Ancillary Transport Activities and 3.3% in Computing, as did the number of establishments, up 0.7% and 2.5%, respectively.

Following them as regards turnover, although quite a way behind, was the **Sport and Recreational Activities** division, which turned over nearly 701 million euros in 2020, employing 10,335 people at 1,709 establishments. Compared to 2019, it registered a 16.1% drop in sales, while employment (-0.3%) and the number of establishments (0.5%) remained virtually unchanged.

Property Activities came close to the previous division in terms of turnover, with 629.5 million euros, but not in terms of employment, with approximately half the number of employees

(5,229), or establishments (3,092). In 2020, it saw an 8.2% reduction in turnover, but not in employment, which grew by 3.1%, or the number of establishments, up 4.6%.

Next were **Cultural Activities**. This activity group undoubtedly posted the most significant fall of all those comprising the sector, with turnover decreasing by as much as 49.7%. The 1,069 million euros in turnover in 2019 became 538 million in 2020, as a result of the restrictive measures imposed on activity to combat the COVID-19 pandemic. Their impact on employment, however, was very controlled (-0.9%).

Other Personal Services includes diverse activities such as Hairdressing and Other Beauty Treatments, Washing and Cleaning of Clothing, and Physical Maintenance Activities, among others. Similarly to Cultural Activities, this other activity group also suffered a sharp decline in turnover, which fell by 27.1% to stand at 393 million, and a moderate drop in employment of 1.2%, although the number of establishments rose by 3.1%.

Likewise, **Auxiliary Financial Services** posted a negative performance, with a much more modest reduction in turnover of 6.3%; it also saw a 1.9% decrease in employment and 2.0% fewer establishments.

Main variables of the miscellaneous services sector of the Basque Country by activity group (Thousands of euros). 2020



| | Establishments | | Personnel employed | | Amount of turnover | | Expenditures on personnel | |
|--|----------------|--------------|--------------------|--------------|--------------------|--------------|---------------------------|--------------|
| | Value | Increase (%) | Value | Increase (%) | Value | Increase (%) | Value | Increase (%) |
| Support activities for transportation | 1.063 | 0,7 | 11.704 | 7,3 | 2.931.670 | 0,8 | 584.372 | 13,6 |
| Postal and courier activities | 1.110 | 10,1 | 4.781 | 5,2 | 190.869 | -25,9 | 107.208 | -8,1 |
| Publishing activities | 357 | -4,8 | 1.736 | -6,2 | 176.129 | -17,6 | 66.930 | -9,2 |
| Audiovisual, films, radio and TV | 783 | 0,5 | 3.290 | 0,6 | 153.288 | -27,9 | 129.269 | -1,5 |
| Information technology | 2.118 | 2,5 | 15.791 | 3,3 | 1.446.248 | 0,8 | 672.837 | 3,0 |
| Financial auxiliaries | 2.571 | -2,0 | 4.806 | -1,9 | 403.570 | -6,3 | 152.979 | -10,8 |
| Real estate activities | 3.092 | 4,6 | 5.229 | 3,1 | 629.483 | -8,2 | 155.928 | -6,1 |
| Cultural activities | 2.665 | 2,2 | 7.324 | -0,9 | 537.885 | -49,7 | 183.402 | -21,8 |
| Sports activities and amusement activities | 1.709 | 0,5 | 10.335 | -0,3 | 700.912 | -16,1 | 485.576 | 5,5 |
| Repair of Computers and Other Items | 1.110 | -2,9 | 2.322 | -1,6 | 167.015 | -4,0 | 48.435 | -14,2 |
| Other personal service activities | 6.959 | 3,1 | 14.052 | -1,2 | 392.850 | -27,1 | 147.002 | -41,7 |

Date August 4, 2022

Source: Eustat. Services survey

(1) The sundry services section of the 2020 Services Survey consists of those establishments whose exclusive or main activity, according to CNAE-2009, is included in one of the following activity groups: 52, 53, 58, 59, 60, 62, 63, 66, 68, 90, 91, 92, 93, 95 and 96.

The remaining activities, with turnover figures already below 200 million euros in 2020, also registered decreases in turnover.

Audiovisuals, Cinema, Radio and Television recorded a considerable drop in turnover of 27.9%, while employment increased by 0.6% and the number of establishments was up 0.5%. **Publishing** activities saw turnover fall by 17.6%, but in this case, there were also decreases

in employment (-6.2%) and the number of establishments (-4.8%). Similarly, **Postal and Courier Activities** reported a 25.9% reduction in turnover, although employee numbers rose by 5.2% and the number of establishments by 10.1%. Lastly, **Repair of Computers and Other Articles** registered a drop of 4% in turnover, 1.6% in persons employed and 2.9% in the number of establishments in the activity group.

Provincial analysis

Employment in the Sundry Services sector grew in Bizkaia (2.3%) and Álava (1.9%), but remained practically unchanged in Gipuzkoa (-0.2%)

In terms of provincial distribution and looking at the number of establishments, more than half, 12,857, were located in Bizkaia, 7,710 in Gipuzkoa and 3,000 in Álava. In relative terms, and in the same order, they accounted for 54.5%, 32.8% and 12.7%, respectively.

In the three provinces, the largest activity group in terms of quantity was Other Personal Services, with 3,746 establishments in Bizkaia (29.2% of all establishments in the province), 2,340 in Gipuzkoa (30.4%) and 873 in Álava (29.1%).

Looking at activities as a whole, all three provinces saw an increase in the number of establishments compared to 2019, which stood at 3% in the case of Álava, 2.4% in Gipuzkoa and 1.6% in Bizkaia.

As regards employment, in 2020 the provincial distribution of total employment in the Sundry Services sector in the Basque Country was 56.5% in Bizkaia, 29.1% in Gipuzkoa and 14.4% in Álava, or, in other words, there were 45,976 people employed in this sector in Bizkaia, 23,674 in Gipuzkoa and 11,720 in Álava.

In this case, the main activities by province were Computing in Bizkaia (22.8%), Other Personal Services in Gipuzkoa (19.3%) and Ancillary Transport Activities in Álava (19.3%). Other noteworthy activities in terms of the number of jobs were Computing in Álava (17.3%), Other Personal Services in Bizkaia (16.6%) and Sport and Recreational Activities in Gipuzkoa (14.8%).

In the most recent year for which information is available, there was an upward trend in employment in Bizkaia, which posted a 2.3% rise in jobs, as well as in Álava, where growth stood at 1.9%. Gipuzkoa, however, registered a moderate drop of 0.2%.

Meanwhile, turnover followed a very different trend to that of employment or establishments. It was negative for all three provinces, particularly in the case of Gipuzkoa, where the fall in turnover for this activity sector in 2020 stood at over 400 million euros, down 17.2% on 2019. There were also significant decreases in Álava and Bizkaia of -11.3% and -9%, respectively. After these drops, sales amounted to 4,504 million euros for Bizkaia, 2,140 million for Gipuzkoa and 1,086 for Álava.

Main variables of the miscellaneous services sector of the Basque Country by Historical Territory (Thousands of euros). 2020



| | Basque Country | | Araba/Álava | | Bizkaia | | Gipuzkoa | |
|-----------------------------|----------------|--------------|-------------|--------------|-----------|--------------|-----------|--------------|
| | Value | Increase (%) | Value | Increase (%) | Value | Increase (%) | Value | Increase (%) |
| Establishments (number) | 23.537 | 2,0 | 3.000 | 3,0 | 12.827 | 1,6 | 7.710 | 2,4 |
| Employed personnel (number) | 81.370 | 1,5 | 11.720 | 1,9 | 45.976 | 2,3 | 23.674 | -0,2 |
| Turnover | 7.729.919 | -11,8 | 1.085.826 | -11,3 | 4.503.876 | -9,0 | 2.140.217 | -17,2 |
| Supplies | 2.671.524 | -9,8 | 378.958 | -0,7 | 1.561.848 | -5,8 | 730.718 | -20,7 |
| Expenditures on personnel | 2.733.938 | -3,4 | 392.487 | -3,9 | 1.558.974 | -1,4 | 782.477 | -7,0 |

Date August 4, 2022

Source: Eustat. Services survey

Staff expenditure fell in line with the aforementioned reductions in turnover, although not as sharply. There was a general decrease of 3.4% in the Basque Country, in Gipuzkoa it rose to 7%, in Álava it was 3.9%, and Bizkaia saw the most moderate decline of just 1.4%.

Analysis by employment stratum

Analysing details of **establishment size** according to employment provided additional information.

Firstly, micro-enterprises, that is, establishments with fewer than 10 employees, represented 95% of total establishments, employed 48.2% of all staff and generated 36.5% of the sector's turnover.

Small businesses, with 10 to 49 employees, accounted for 4.2% of establishments, provided employment for 24.5% of the sector and in 2020 generated 30.2% of total turnover. Finally, companies with 50 or more employees, with only 0.7% of establishments, employed 27.3% of the total and turned over a volume of 33.3% of the total.

The evolution between 2019 and 2020 was different for companies with 50 or more employees than for others. Micro-enterprises (with fewer than 10 employees) saw the number of establishments increase by 2.2% and employment grow by 0.8%; turnover, however, fell by 19.2%. Likewise, businesses with 10 to 49 employees recorded a rise of 0.8% in the number of establishments and 1.4% in employment, but also saw turnover decline by 14%. By contrast, companies with 50 or more employees, despite having 3.9% fewer establishments, achieved a 2.8% increase in employment and moderate growth in turnover of 0.8%.

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