

## Professional Activities and Auxiliary Services recorded growth of 9.1% and turned over 11,336 million euros in the Basque Country in 2023

*The most notable contributions to this growth came from Travel Agencies (34.9%) and Research and Development (23.1%)*

The turnover of establishments in the **Professional Activities and Auxiliary Services** sector stood at 11,336 million euros in 2023, at current prices, up 9.1% on 2022, according to Eustat data. This sector posted a positive trend in most of the key economic indicators.

Not only did the sector see three consecutive years of significant growth in terms of turnover, with increases of 7.8%, 11.6% and the 9.1% mentioned for 2023, thus achieving the best result in the available historical series, but also, with regard to activity, employment saw an increase of 2.2% in 2023 compared to the previous year. This evolution confirms a pattern of sustained growth that began in 2013 and was only interrupted during the years marked by the pandemic. Since then, the number of people employed in the sector has increased by 17.2%, reaching a total of 134,588 workers in 2023, another record high.

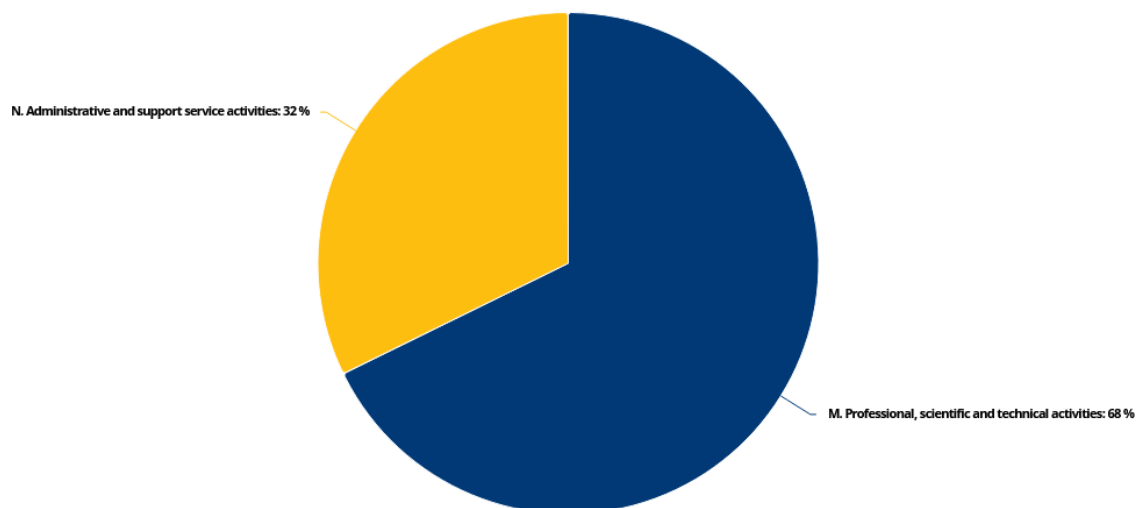
Meanwhile, the number of establishments, which had been declining even before the pandemic, saw an upturn of 1.7% in 2023, reaching 27,373 units. This growth represents a recovery from the all-time low recorded in 2022, when this figure stood at 26,926, the lowest value in the entire series.

In line with the increase in turnover, the gross value added at factor cost obtained by **Professional Activities and Auxiliary Services** establishments (which represents the wealth generated and is equivalent to gross output minus intermediate consumption after adjustment for subsidies and indirect taxes) increased by 10.3%, standing at 7,416 million euros, at current prices, 690 million more than in 2022, once again making it the highest sum for gross value added in the available historical series.

Following the same trend as gross value added, apparent labour productivity (which links value added to employment) also increased, rising from 7.6% in 2022 to 7.9% in 2023, reflecting greater efficiency in the use of human resources.

### Division of turnover within the professional activities and auxiliary service sector by activity sub-sector. 2023

percentage



Source: Eustat. Services survey

### Division of personnel employed within the professional activities and auxiliary service sector by activity sub-sector. 2023

percentage



Source: Eustat. Services survey

## **Analysis by Division**

### ***Travel Agencies (34.9%) and Research and Development (23.1%) saw significant growth in turnover***

The Professional Activities and Auxiliary Services sector is comprised of two sections: Professional, Scientific and Technical Activities and Administrative Activities and Auxiliary Services.

With regard to the former, the **Professional, Scientific and Technical Activities** section had 21,443 establishments and was predominant in terms of number of establishments, accounting for 78.3% of the total. It also dominated in regard to turnover, with 7,680 million euros, representing 67.7% of the sector's total. This was not the case with respect to employment, as its 65,607 employees accounted for slightly less than half of total employment in the sector (48.7%).

In an analysis of the results at a more disaggregated activity level, it is worth highlighting the divisions **Legal and Accounting Activities** and **Architectural and Engineering Services** in this section. With turnover of 3,566 million euros for the former, 46.4% of its division, and 2,491 million euros for the latter, 32.4% of the division, between them they accounted for 78.9% of total turnover, 73% of total establishments and 69.4% of jobs.

This financial year, the Legal and Accounting Activities division employed 26,475 people at 10,253 establishments, while the 5,394 Architectural and Engineering Services establishments provided 19,049 jobs. Compared to the previous financial year, both divisions posted a positive trend, although to different degrees. With regard to turnover, Legal and Accounting Activities recorded higher growth than Architectural and Engineering Services: 9% for the former (up 293 million) compared to 4% for the latter (up 96 million). However, in terms of both the number of establishments (0.4% compared to 1.4%) and employment (1.9% compared to 2.4%), it was Architectural and Engineering Services that registered the most positive figures.

As regards the remaining three divisions, **Research and Development** posted a very positive performance, with turnover increasing by 23.1% compared to the previous year (up 130 million). **Other Professional Activities** (including Design, Photography, Translation and Interpreting, and Veterinary Activities, among others) registered a significant rise of 11.5%, while turnover in the **Advertising and Market Research** division was up 6.5%.

There was a downward trend in employment in Research and Development Activities, with 0.7% fewer jobs than in 2022, despite a 4.8% rise in the number of establishments. Other Professional Activities posted increases of 1.8% in employment and 4.8% in the number of establishments. Likewise, the Advertising and Market Research branch registered positive trends in both the number of establishments (3.5%) and people employed (1.4%).

## Main variables of the Professional activities and auxiliary services sector of the Basque Country by activity group (Thousands of euros). 2023

|  | Establishments |              |                      | Personnel employed |              |                      | Turnover          |              |                      |
|--|----------------|--------------|----------------------|--------------------|--------------|----------------------|-------------------|--------------|----------------------|
|  | Value          | % over total | Annual variation (%) | Value              | % over total | Annual variation (%) | Value             | % over total | Annual variation (%) |
| <b>Professional activities and auxiliary services</b>    | <b>27.373</b>  | <b>100,0</b> | <b>1,7</b>           | <b>134.588</b>     | <b>100,0</b> | <b>2,2</b>           | <b>11.335.908</b> | <b>100,0</b> | <b>9,1</b>           |
| <b>Professional, scientific and technical activities</b> | <b>21.443</b>  | <b>78,3</b>  | <b>1,7</b>           | <b>65.607</b>      | <b>48,7</b>  | <b>1,6</b>           | <b>7.679.561</b>  | <b>67,7</b>  | <b>8,5</b>           |
| - Legal and accounting activities                        | 10.253         | 47,8         | 0,4                  | 26.475             | 40,4         | 1,9                  | 3.566.114         | 46,4         | 9,0                  |
| - Architectural and engineering services                 | 5.394          | 25,2         | 1,4                  | 19.049             | 29,0         | 2,4                  | 2.490.562         | 32,4         | 4,0                  |
| - Research and development                               | 455            | 2,1          | 4,8                  | 8.851              | 13,5         | -0,7                 | 689.537           | 9,0          | 23,1                 |
| - Advertising and market research                        | 1.396          | 6,5          | 3,5                  | 3.927              | 6,0          | 1,4                  | 375.355           | 4,9          | 6,5                  |
| - Other professional activities                          | 3.945          | 18,4         | 4,8                  | 7.305              | 11,1         | 1,8                  | 557.993           | 7,3          | 11,5                 |
| <b>Administrative activities and auxiliary services</b>  | <b>5.930</b>   | <b>21,7</b>  | <b>1,5</b>           | <b>68.981</b>      | <b>51,3</b>  | <b>2,8</b>           | <b>3.656.347</b>  | <b>32,3</b>  | <b>10,4</b>          |
| - Rental and leasing activities                          | 590            | 9,9          | -1,2                 | 2.522              | 3,7          | -2,1                 | 531.395           | 14,5         | 14,3                 |
| - Employment related activities                          | 240            | 4,0          | 3,4                  | 10.710             | 15,5         | 11,4                 | 408.614           | 11,2         | 7,1                  |
| - Travel agencies  | 752            | 12,7         | 4,9                  | 1.892              | 2,7          | 2,7                  | 500.017           | 13,7         | 34,9                 |
| - Other service activities                               | 4.348          | 73,3         | 1,2                  | 53.857             | 78,1         | 1,5                  | 2.216.321         | 60,6         | 5,8                  |

Date May 14, 2025

Source: Eustat. Services survey

For its part, the other major section, **Administrative Activities and Auxiliary Services**, turned over 3,656 million euros, representing 32.3% of the total revenue in Professional Activities and Auxiliary Services. Its 68,981 jobs made up 51.3% of total employment, while its 5,930 establishments accounted for 21.7% of all establishments in this activity sector.

Within this section, it is worth highlighting the contribution to the total made by the **Other Services Activities** division (comprised of Security and Research Activities, Gardening and Building Services and Auxiliary Business Services). It accounted for three quarters of jobs and establishments overall within the section (78.1% and 73.3%, respectively). Its performance was positive in terms of people employed (1.5%) and number of establishments (1.2%). The same can be said of turnover, which rose by 5.8%.

Apart from Other Services Activities, the other divisions played a relatively small role in their section. As such, 12.7% of establishments and 2.7% of jobs corresponded to **Travel Agencies**; 9.9% of establishments and 3.7% of jobs to **Rental Activities**, and 4% of establishments and 15.5% of jobs to **Employment-Related Activities**.

All three registered increases in turnover. Of particular note was the recovery in turnover in Travel Agencies, which saw a dramatic uptick of 34.9% this year compared to the previous one (up 129 million); employment increased by 2.7% and the number of establishments also grew by 4.9%. Rental Activities saw 14.3% growth in turnover, but a drop of 2.1% in employment and 1.2% fewer establishments. In addition, Employment-Related Activities recorded growth in both employee numbers (11.4%) and turnover (7.1%), as well as the number of establishments (3.4%).

## Provincial analysis

### *Widespread growth, but with disparities between provinces*

In terms of provincial distribution and looking at the number of establishments, 52.6% of the Basque Country total were located in Bizkaia, 34% in Gipuzkoa and 13.5% in Álava, with significant variations depending on the activity. For example, Legal and Accounting Activities accounted for 58.7% in Bizkaia, Research and Development Activities constituted 47.3% of the total in Gipuzkoa, and Employment-Related Activities represented 20.8% in Álava, to name the most representative in each province.

Analysing the recent trends in the three provinces, a positive dynamic can be seen in all the indicators considered, albeit to varying degrees. As a whole, the three provinces recorded balanced growth between economic activity and employment, with notable improvements in both turnover and staff expenditure.

In Álava, the data for 2023 show a dynamic performance. Employment was up 6.5% compared to 2022, reaching 19,999 jobs, and this growth was accompanied by a similar increase in turnover, which exceeded 1,399 million euros. Even more remarkable was the rise in staff expenditure, which saw growth of 11.1%. The number of establishments also increased, albeit more moderately, rising by 1.3% compared to the previous year to stand at 3,688.

Meanwhile, in 2023, Bizkaia presented a slightly more moderate profile in terms of employment and establishments, but a stronger profile with regard to turnover. The number of jobs grew by 1.4% to stand at 75,234, while the number of establishments increased by 1.5% to over 14,000. However, as mentioned above, the most remarkable trend was in turnover, which registered an increase of 10.7%, reaching almost 7,000 million euros. Staff expenditure also followed an upward trend, rising by 7.6%.

Lastly, there was significant growth in Gipuzkoa, especially in terms of the number of establishments, which increased by 2% to stand at 9,294. Employment rose by 1.6% to 39,355 people, while turnover increased by 6.7% to close to 2,944 million euros. Staff expenditure continued the same trend with a rise of 6.5%.

## Main variables of the Professional activities and auxiliary services sector of the Basque Country by Historical Territory (Thousands of euros). 2023

|                             | Basque Country | Increase % 2023-2022 | Álava     | Increase % 2023-2022 | Bizkaia   | Increase % 2023-2022 | Gipuzkoa  | Increase % 2023-2022 |
|-----------------------------|----------------|----------------------|-----------|----------------------|-----------|----------------------|-----------|----------------------|
| Establishments (number)     | 27.373         | 1,7                  | 3.688     | 1,3                  | 14.391    | 1,5                  | 9.294     | 2,0                  |
| Employed personnel (number) | 134.588        | 2,2                  | 19.999    | 6,5                  | 75.234    | 1,4                  | 39.355    | 2,0                  |
| Turnover                    | 11.335.908     | 9,1                  | 1.399.199 | 6,5                  | 6.992.733 | 10,7                 | 2.943.976 | 6,7                  |
| Supplies                    | 2.528.098      | 7,9                  | 256.045   | -2,8                 | 1.640.387 | 10,3                 | 631.666   | 6,4                  |
| Expenditures on personnel   | 4.780.361      | 7,8                  | 686.968   | 11,1                 | 2.704.446 | 7,6                  | 1.388.947 | 6,5                  |

Date May 14, 2025

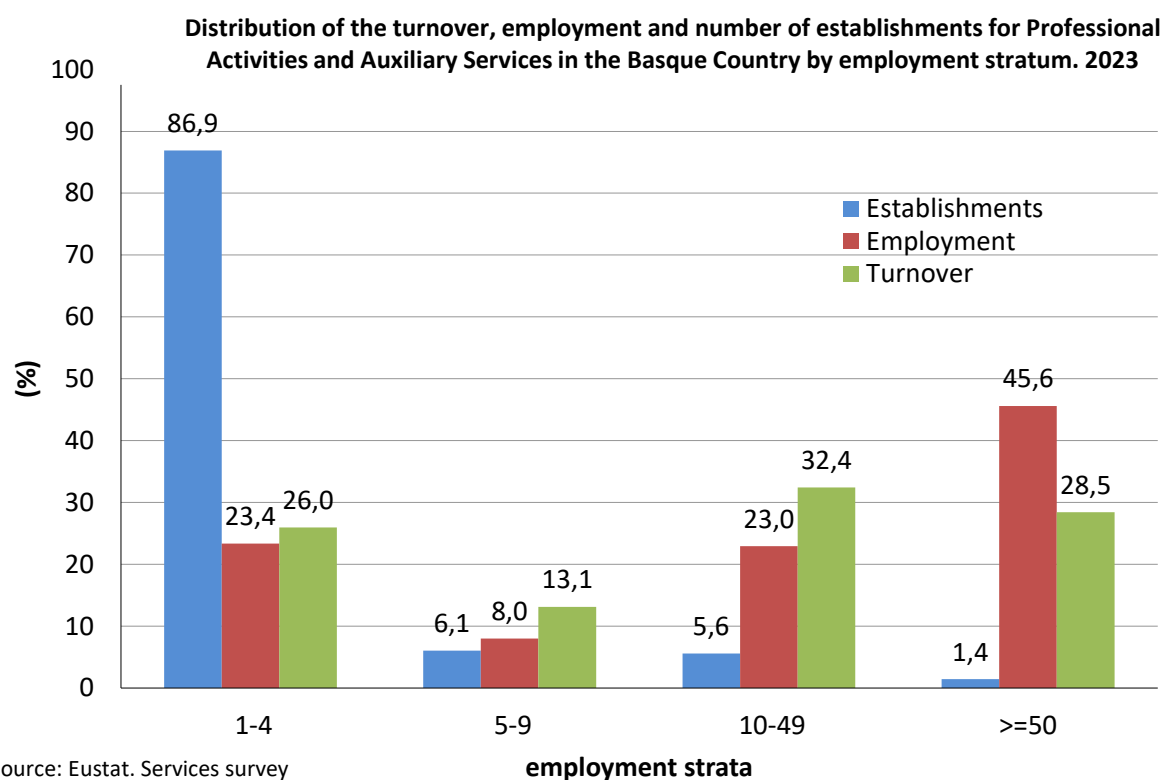
Source: Eustat. Services survey

## Analysis by employment stratum

### *Growth in turnover was seen across all strata*

A detailed analysis of the distribution of **establishment size**, classified according to their volume of employment, provided additional information. In general terms, the year-on-year evolution shows a positive trend for all employment strata.

In terms of their distribution in the sector as a whole, micro-enterprises represented 93% of the total number of establishments, employing 31.4% of the workforce and generating 39.1% of the sector's turnover. Small businesses, with 10 to 49 employees, accounted for 5.6% of establishments, but employed 23% of the workforce and generated 32.4% of total turnover in the Professional Activities and Auxiliary Services sector. Finally, large companies, with more than 50 employees, represented just 1.4% of establishments, but employed 45.6% of staff and generated 28.5% of total turnover.



In particular, micro-enterprises (with 1 to 9 employees) saw an increase in turnover, with a rise of 11.9%, employment, with growth of 1.7%, and the number of establishments, up 1.8%.

Meanwhile, small businesses (with 10 to 49 employees) registered growth of 5.8% in turnover, an increase of 1.1% in employment and a rise of 0.7% in the number of establishments.

Lastly, larger companies (with more than 50 employees) posted an increase in turnover, up 9.1%, and in employment, with a rise of 3.1%, but saw a drop in the number of establishments, which fell by 0.8%.

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