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SPPI for Travel agency and tour operator activities (ISIC 79)

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Introduction

The travel agency and tour operator activities are measured by Service Producer Price Index (SPPI). This paper provides an overview of methodological framework of the SPPI for travel agency, tour operator and other reservation service and related activities (N79) in Estonia. Setting up the production process for new Service Producer Price Index (SPPI) of NACE division N79 was funded by the European Union (grant no 101022559 — 2020-EE-B5640-EBS).

This paper will be presented at the 40th meeting of the Voorburg Group meeting.

Standard classification structure

The Estonian Statistical Classification of Economic Activities (EMTAK 2008) corresponds with the Statistical Classification of Economic Activities in the European Community (NACE Rev. 2). The first four levels of EMTAK are identical to the first four levels of NACE Rev.2. The 5th level describes economic activities more precisely. NACE Rev.2 corresponds to ISIC Rev.4 and the descriptions of activities are almost identical in both classifications.

The institution responsible for the development and maintenance of the classification in Estonia is the Centre of Registers and Information Systems.

According to EMTAK, activity N79 is classified as follows. For SPPI N79 calculation EMTAK classification is used.

79 Travel agency, tour operator and other reservation service and related activities

Division 79 includes the activity of agencies, primarily engaged in selling travel, tour, transportation and accommodation services to the general public and commercial clients and the activity of arranging and assembling tours that are sold through travel agencies or directly by agents such as tour operators; and other travel-related services including reservation services. The activities of tourist guides and tourism promotion activities are also included.

791 Travel agency and tour operator activities

This group includes the activities of agencies, primarily engaged in selling travel, tour, transportation and accommodation services to the general public and commercial clients and the activity of arranging and assembling tours that are sold through travel agencies or directly by agents such as tour operators.

7911 Travel agency activities

79111 Travel agency activities

This class includes:

- activities of agencies, primarily engaged in selling travel, tour, transportation and accommodation services on a wholesale or retail basis to the general public and commercial clients

7912 Tour operator activities

79121 Tour operator activities

This class includes:

- arranging and assembling tours that are sold through travel agencies or directly by tour operators. The tours may include any or all of the following:
 - transportation
 - accommodation
 - food
 - visits to museums, historical or cultural sites, theatrical, musical or sporting events

799 Other reservation service and related activities

7990 Other reservation service and related activities

79901 Other reservation service and related activities

This class includes:

- other travel-related reservation services:
 - reservations for transportation, hotels, restaurants, car rentals, entertainment and sport etc.
- time-share exchange services
- ticket sales activities for theatrical, sports and other amusement and entertainment events
- visitor assistance services:
 - provision of travel information to visitors
 - activities of tourist guides
- tourism promotion activities

This class excludes: *the activities of travel agencies and tour operators, see 7911, 7912; organisation and management of events such as meetings, conventions and conferences, see 8230.*

Market conditions and constraints

In 2024, the share of the sector N79 in total economy is as follows: number of enterprises – 0.44%, average annual number of persons employed – 0.36% and turnover – 0.56%¹. These shares are almost back to the level of 2019.

According to “EM001: Financial Statistics of Enterprises by Economic Activity and Number of Persons Employed”¹, the total turnover of the sector Travel agency, tour operator and other reservation service and related activities was 521 million euros in 2024 (108 million euros in 2020). The main financial indicators per EMTAK level are presented in Table 1.

Table 1. Annual financial statistics data of enterprises by economic activities in 2024.

	Number of enterprises	Number of persons employed	Turnover, thousand Euros	Value added, thousand Euros
Economic activities total	159 747	544 890	93 786 159.2	22 2394 938.9
79 Travel agency, tour operator and other reservation service and related activities	699	1 948	521 012.2	71 230.2
791 Travel agency and tour operator activities	394	1 065	425 334.6	39 848.6
799 Other reservation service and related activities	305	883	95 677.5	31 381.6

The number of enterprises in this industry is increasing year by year – from 314 in 2009 to 699 in 2024 and was 0.44% of the total number of the enterprises in the statistical population in 2024¹.

Since most enterprises belonging to the group N791 provide the services of both travel agencies and tour operators, their classification into either class is difficult and therefore they will hereafter be addressed together as group N791. 81,6% of the sector N79 turnover was provided by group 791 Travel agency and tour operator activities (Fig. 1).

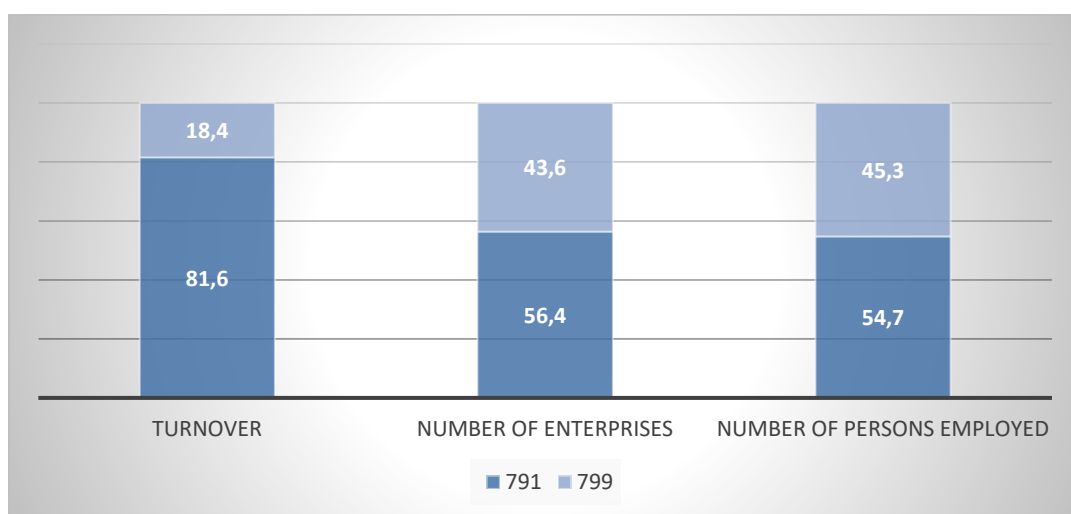


Figure 1. The contribution (%) of the industries within N79 to the values of the main financial indicators of the sector.

Sector turnover experienced a sharp decline in 2020, followed by steady growth from 2021 onwards, reaching the 2019 level (Figure 2)¹.

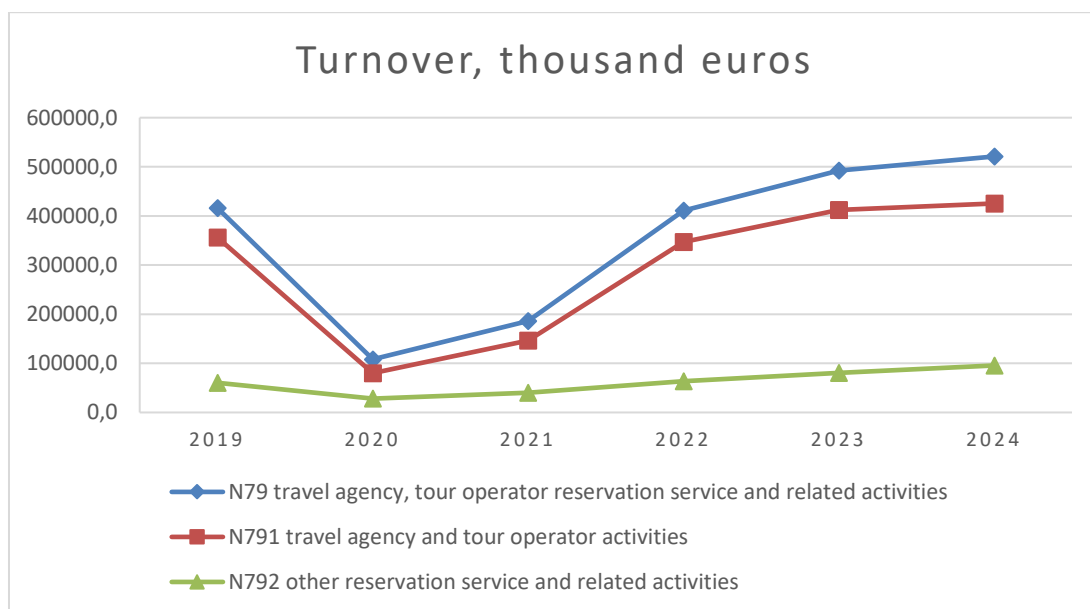


Figure 2. The dynamics in turnover of sector N79 from the beginning of 2019.

The average annual number of persons employees in the sector declined until 2021 and then began to recover. The recovery proceeded at similar pace in both subsectors until 2023, after which growth in 791 began to slow down (Figure 3)¹.

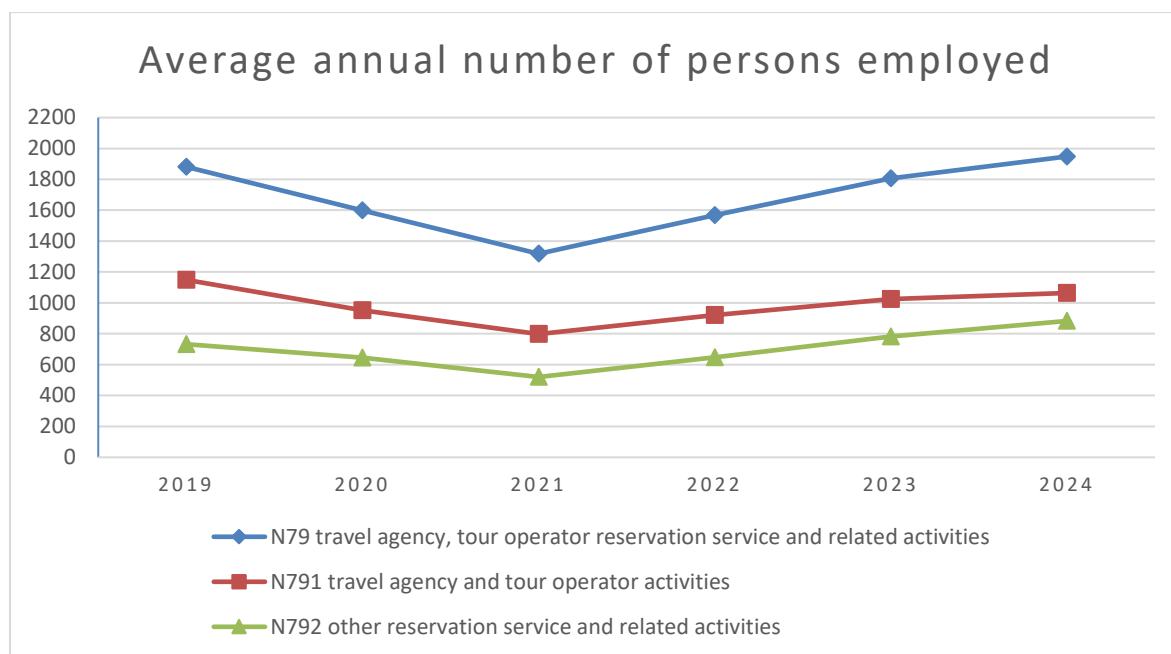


Figure 3. The dynamics in the number of persons employed in sector N79 from the beginning of 2019.

To support the tourism sector, there are two active representative organizations in Estonia:

Estonian Travel and Tourism Association (ETFL) is a voluntary association of tourism industry's employers that acts in the interest of its members. ETFL was founded in 1990 with a goal to develop tourism, function as a quality and reliability trademark, represent its members' interest in evolving tourism politics, support its members' activity, and facilitate in creating new business contacts. The full members of ETFL (58 in total) are travel agencies and tour operators, associated members (20 in total) are transportation enterprises, tourism organizations, educational institutions, hotels, insurance enterprises, foreign tourism organizations/enterprises and other organizations that offer supportive services for tourism industry. The main activities of the association are developing tourism

Estonian Rural Tourism was established in 2000 with an aim to represent enterprises involved in rural tourism and to contribute to the development of rural tourism in Estonia. It unites 310 members, including tour operators, tour guides, providers of travel information and tourism promoters.

Measurement of SPPI

Price survey details for activity 791 Travel agency and tour operator activities

The main service provided by travel agencies is the selling of package holidays. This involves specifying clients' wishes and needs, advisory services, and issuing tickets. More precisely, travel agencies make transport reservations (airplane, bus, train, boat or shuttlebus tickets, car rental), accommodation reservations, cruise boat ticket reservations, reservations for package holidays – both in Estonia and abroad. Additionally, some enterprises provide incoming- and conference organization services, reservations to international conferences and exhibitions, travel insurance mediation, pet transport, etc. Often these services are provided via telephone or the Internet.

The main activity of tour operators is organizing package holidays and selling them either directly or through travel agencies. The package holidays may be either local or international, and aimed for either individual travellers or larger groups. A package holiday usually includes transport and accommodation services, and additional services, such as catering, visits to museums or historic places, and participation in theatre plays, concerts or sports events.

The activity is dominated by micro-level business enterprises. Only a few enterprises have more than 10 employees.

Enterprises within this industry often offer customized products and services, which are customer-unique and for this reason hardly comparable. Either fixed prices per type of product or service, fees quoted as a percentage of sold product or service value, or fixed hourly charges are used. Service fees are rarely presented on enterprise homepages set apart from the price of the whole product, especially regarding business-to-business services. The services are provided both business to business and business to consumer.

In order to keep the response burden as minimal as possible, the primary choice for price collection was using the list prices available on the web pages of the largest enterprises of activity 791. These included various fixed reservation, change or cancellation fees; hourly charges for consultation or finding travel possibilities; the prices of specific package holidays and fees quoted as a percentage of sold product value. The enterprises that did not have service charges available on their web pages were subjected to filling out a questionnaire. Additionally, the consumer price index (CPI) showing the price changes of package holidays is used.

Price survey details for activity 799 Other reservation service and related activities

The group other reservation service and related activities is a diverse group that includes several independent services.

The services frequently performed by major enterprises include ticket reservations not conducted by tour operators or travel agencies, time share exchange services, provision of travel information to visitors, activities of tourist guides and tourism promotion activities.

There are classification issues as it is disputable what kind of activities enterprises really perform.

Even though the number of enterprises belonging to class 7990 forms 43,6% of the whole sector, the turnover is only 18,4% of total N79 turnover, giving this group quite a small weight compared to group N791.

Price changes for other reservation service and related activities are estimated using CPI sources and the list prices available on the web pages of the enterprises. The services are provided both business to business and business to consumer. Mostly in this group, services are sold to private consumers, we assume that the price change for business customers is the same.

SPPI for N79

The Business Register for Statistical purposes was used to identify enterprises for the sample.

The sample was applied to the group level of EMTAK, considering the criteria of turnover and availability of prices.

For monthly price collection, an electronic questionnaire was compiled in the data collection environment Voxco, which is transmitted to 4 enterprises whose main activity falls under the group N791. The monthly questionnaire includes specifications of the service, pricing unit, price of the service in the current and previous period. The prices on the web pages and CPI are used.

The SPPI at 2-digit level for industry N79 is published. The results are available in Figure 4. The activities aggregated into the index are 791 - Travel agency, tour operator and other reservation service and related activities and 799 - Other reservation service and related activities.

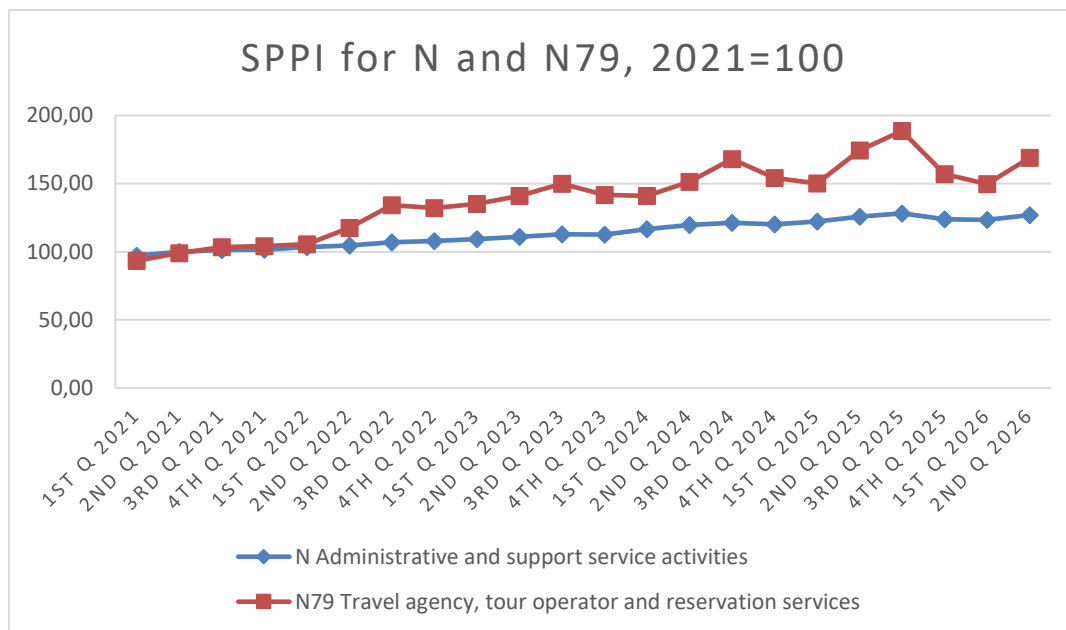


Figure 4. The Service Producer Price Index for N and N79 from the 1st quarter of 2021.

Evaluation of comparability of price indexes with output data

The financial data of enterprises have been collected on the basis of the annual and quarterly statistical surveys. The surveys population comprises enterprises included in the register of economically active enterprises called the Statistical Profile. The Statistical Profile is created on the basis of the Commercial Register and is used as the sampling frame. By number of employed persons, the survey included all enterprises with 20 and more employed persons. Stratified simple random sampling was used for small enterprises (with 1–19 employed persons).

Annual financial (turnover) data are collected for division N79 of EMTAK2008 and available for use.

The total SPPI and division level indices are published t+45 days. Statistics Estonia publishes the SPPI in quarterly bases. The time-series starts from 1st quarter of 2021.

The SPPI N79 data is used for deflation for national accounts and for the compilation of service production index (volume index).

Evaluation of measurement

The Service Producer Price Index for N79 has quite short time-series and calculation practice in Estonia.

Regarding the classification of enterprises and their main activities, it is difficult to set apart travel agencies from tour operators, as enterprises in the sector often perform both activities. Also, it is problematic to discern the main activities of enterprises belonging to group N799, because of the diverse nature of the services provided by members of this group.

When collecting data, it is important to take the response burden into consideration. If an alternative data source is available, it will be assessed and, where appropriate, used for data collection. Alternative data sources may not always perfectly meet our needs, but they can significantly reduce the response burden.

Price collection for travel agencies and tour operator activities is carried out by using list prices available in web pages of the enterprises, electronic questionnaires and CPI sources.

Price collection for other reservation services and related activities is carried out by using list prices available in web pages of the enterprises and CPI sources. Measuring the price movements of project-based assignments, which are customer unique and hardly comparable, is problematic.

Due to the Covid-19 pandemic, and crisis situations in general, a lot of tourism enterprises have halted their work, which complicates the production of the SPPI for this sector, both for compiling the sample of representative enterprises and services and achieving a regularity in price collection.

References

¹Dataset EM001: Financial Statistics of Enterprises by Indicator, Economic Activity, Number of Persons Employed and Reference Period. Statistical database. Statistics Estonia. Last updated 2026-02-02.

²Dataset IA40: Service Producer Price Index, 2021=100 by Economic activity (EMTAK 2008), Year and Quarter. Statistical database. Statistics Estonia. Last updated 2026-08-14.

Webpages of the largest enterprises classified as N79, Estonian Travel and Tourism Association and Estonian Rural Tourism.