Distributive trades statistics

Retail sale not in stores

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Statistics in focus

INDUSTRY, TRADE AND SERVICES

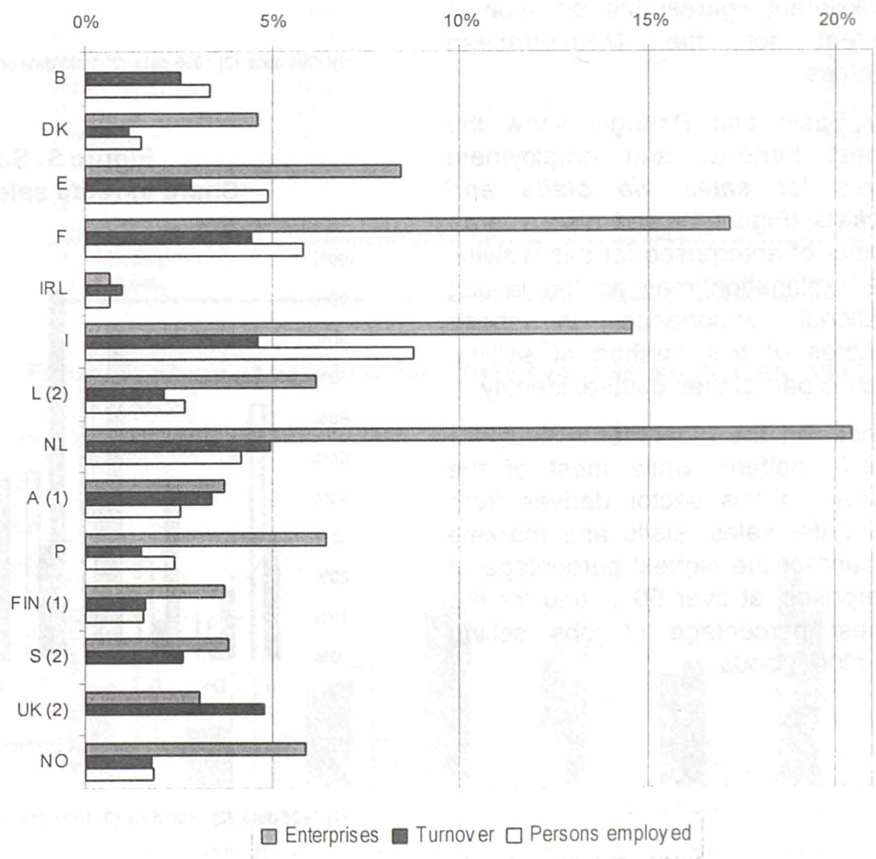
THEME 4 – 21/2000

Contents

Views on the sector

- High percentages of non-store retailers: the Netherlands (20%), France (17%) and Italy (14%) show high non-store shares in total retailing
- Diversity across Member States: mail order sales dominate non-store retailing in most Northern countries; stalls and markets most important in the Mediterranean area and in the Netherlands
- Mail order houses: high productivity in all countries; largest enterprises in Austria and Ireland
- Stalls and markets: the Netherlands far ahead in terms of labour productivity

Figure 1: Share of non-store retail sales in total retail sales, 1997



(1) 1998 data (2) 1996 data

Source: Eurostat SBS database

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Introduction – Presentation of the Sector

This Statistics in Focus *analyses:* ***Retail sale not in stores*** *(NACE 52.6 – see also methodology on page 7).*

This group comprises various retail sales activities, regardless of the type of product sold, and is broken down into the following classes:

- ***retail sale via mail order houses*** *(NACE 52.61) e.g. sales via catalogues, advertisements, models and direct sales via TV, radio and telephone.*
- ***retail sale via stalls and markets*** *(NACE 52.62) e.g. sales from movable stalls on market places*
- ***other non-store retail sale*** *(NACE 52.63) e.g. door-to-door sales persons, vending machine*

Retail sale not in stores is fairly important to the total retail sector not only in terms of turnover and employment in all European countries observed, but also as regards the number of enterprises (Figure 1).

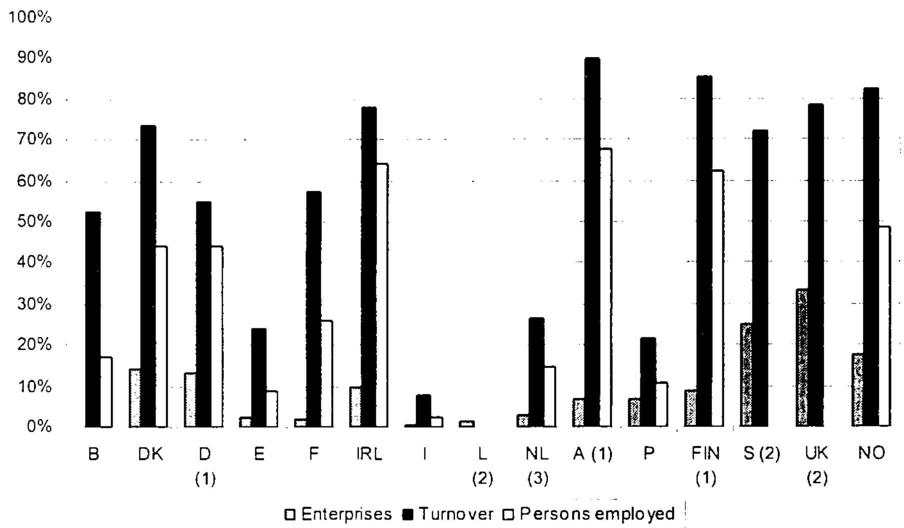
The sector is broken down according to the statistical nomenclature NACE (see also methodological notes on page 7) into the classes below, and shows a heterogeneous picture across countries.

The figures show that, in the Northern Member States of the European Union (except the Netherlands) and in Norway, ***sales via mail order houses*** (Figure 2) are a more important economic area, with few enterprises showing high turnover and employment figures; the situation is different for the Mediterranean countries.

Italy Spain and Portugal show the highest turnover and employment figures for ***sales via stalls and markets*** (Figure 3) and also a large number of enterprises for this activity. One explanation may be the lasting traditional importance in these countries of this method of selling, which is part of their cultural identity.

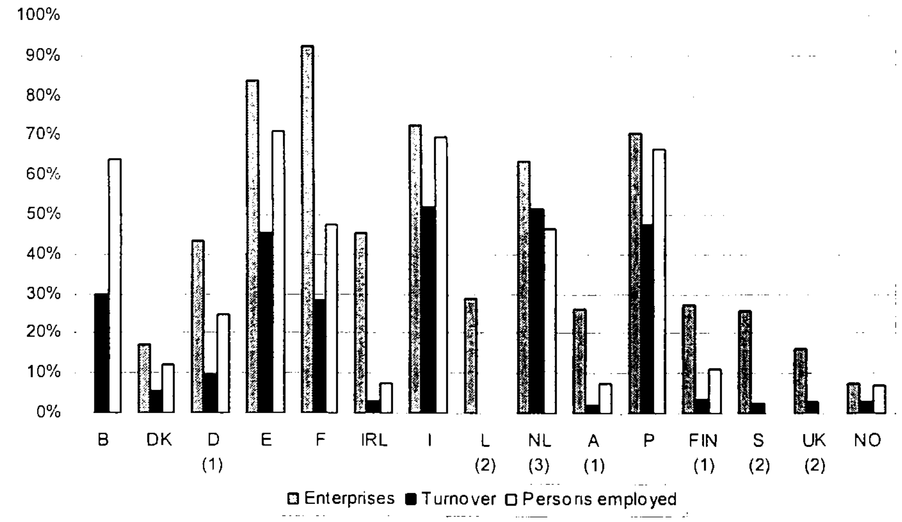
France, on the other hand, shows a specific pattern: while most of the turnover in this sector derives from mail order sales, stalls and markets account for the highest percentage of enterprises, at over 90%, and for the highest percentage of jobs selling non-store goods.

Figure 2: Sales via mail order houses
Share in retail sale not in stores (NACE 52.6), 1997



(1) 1998 data (2) 1996 data (3) 1995 data on turnover *Source: Eurostat SBS database*

Figure 3: Sales via stalls and markets
Share in retail sale not in stores (NACE 52.6), 1997

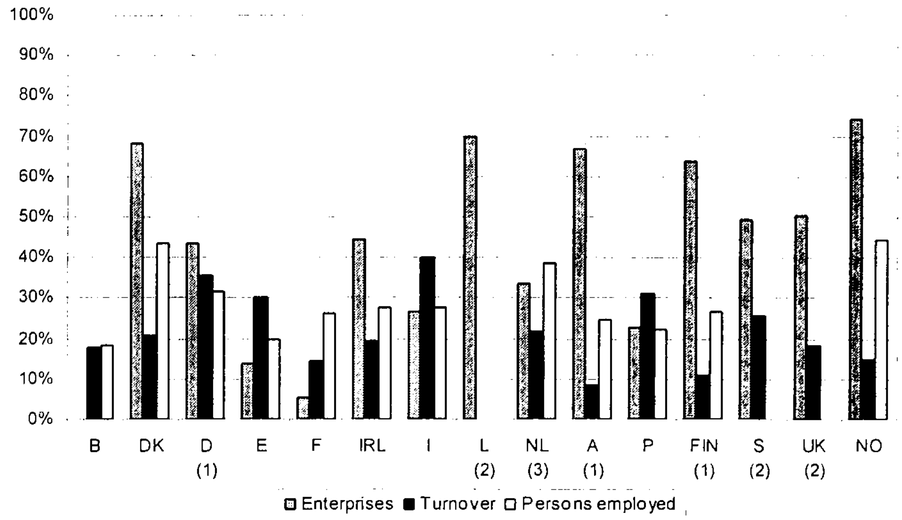


(1) 1998 data (2) 1996 data (3) 1995 data on turnover *Source: Eurostat SBS database*

Other non-store retail sale (Figure 4), which includes, for example, door-to-door selling and sales from vending machines, shows a more even pattern and accounts for a relatively small share of turnover and employment in total retailing not in stores.

Except in France and the Netherlands where, as mentioned above, stalls and markets predominate, most Northern European countries show high percentages of enterprises engaged in other non-store retail activities.

Figure 4: Other non-store retail sale
Share in retail sale not in stores (NACE 52.6), 1997



(1) 1998 data (2) 1996 data (3) 1995 data on turnover *Source: Eurostat SBS database*

Special aspects of employment

Since retail sale not in stores consists of three economic sectors of a highly disparate nature, employment in this activity presents some interesting features.

Retailing via mail order houses involves a particularly high percentage of employees in employment.

As Table 1 shows, in most Member States around 90% of workers in this activity are employees (two exceptions are Italy and Portugal) - a far higher share than in the retail sector in general. This feature can be explained by the relatively large companies in this sector, which employ high proportions of dependent staff.

Stalls and markets, on the other hand, tend to be small family-run businesses with a high level of self-employment. In most countries (Ireland being the exception) fewer than 50% of those working in this sector are employees; in Italy the figure is as low as 4%. This characteristic of both Italy and Portugal reflects the fact that self-employment dominates retailing in these countries.

Figure 5 focuses on part-time employment, already higher in retailing than in other sectors of the economy, and shows stalls and markets ahead in most of the countries observed – a hint that this activity may in general add to rather than constitute the bulk of the family income.

Table 1: Employees as a percentage of total employment in the NACE class concerned and in total retailing, 1997

	Retail sale via mail order houses (Nace 52.61)	Retail sale via stalls and markets (Nace 52.62)	Other non-store retailing (Nace 52.63)	Total retail sales (NACE 52)
EU-15	:	:	:	:
B	98.0	12.1	27.9	65.1
DK (2)	91.1	20.4	29.8	86.8
D	:	:	:	:
EL	:	:	:	:
E	88.9	13.0	52.3	58.3
F	98.7	39.7	92.4	86.6
IRL	95.7	80.0	46.0	81.8
I	74.8	3.9	18.1	38.4
L	:	:	:	:
NL	92.4	46.5	38.3	84.3
A (1)	99.3	25.6	45.8	87.1
P	54.4	13.3	22.0	77.8
FIN (1)	98.4	21.6	61.4	88.8
S	:	:	:	:
UK	:	:	:	:
IS	:	:	:	:
NO	90.6	39.7	26.6	91.3

(1) 1998 data
(2) 1996 data *Source: Eurostat SBS database*

Figure 5: Share of part-time employees in total employees, 1997

(1) 1998 data (2) 1996 data *Source: Eurostat SBS database*

Germany has by far the largest number of enterprises (more than 5 000) engaged in ***sales via mail order houses,*** giving employment to almost 80 000 people and creating a turnover of nearly ECU 17 billion in 1997 (about ECU 3.3 million per enterprise). In second place is the United Kingdom, with considerably fewer enterprises but nevertheless producing more than half of the German turnover (around ECU 9 billion – 1996) (Table 2).

Austria is at the top of the list for turnover per enterprise, however, at over ECU 11 million (1998 figure), followed by Ireland (ECU 7.4 million) and France (around ECU 5 million). These countries also show the highest values for the average size of enterprise in terms of employment.

As regards ***stalls and markets***, the highest figures for numbers of enterprises and persons employed are recorded in ***Italy***: more than 75 000 businesses employ nearly 95 000 people and create a turnover of more than ECU 4 billion.

France, Spain, Germany and the Netherlands also register high values for these variables; France and Germany still show fairly high turnover values, at around ECU 3 billion; Germany shows the largest number of persons employed per enterprise (2.6).

The ***other non-store retailing*** activity, which includes, for example, door-to-door selling, mobile sales and vending machines, is particularly dominant in ***Germany,*** which has the highest figures for turnover (triple the value of Italy) and employment (almost 1.5 times that of Italy), while Italy has the highest number of enterprises, repeating its pattern of many small firms with a relatively low turnover.

While non-food products are the main product category sold through this channel in Germany (tobacco) and in the Netherlands, food products (dairy products, beverages) prevail in most other countries.

Table 2: Retail sale not in stores, main enterprise variables, 1997

	Number of enterprises (units)	Number of persons employed (units)	Turnover (million ECU)	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Number of persons employed per enterprise (units)
			Retail sale via mail order houses (NACE 52.61)			
EU-15	:	:	:	:	:	:
B	:	1 565	566.2	:	361.8	:
DK	209	1 281	208.7	998.6	162.9	6
D (1)	5 110	78 940	16 823.2	3 292.2	213.1	15
EL	:	:	:	:	:	:
E	1 045	5 967	789.7	755.7	130.0	6
F	1 301	22 156	6 511.8	5 005.2	293.9	17
IRL	14	575	103.8	7 414.3	180.5	41
I	702	3 185	650.4	926.5	200.0	5
L (2)	3	:	:	:	:	:
NL (3)	515	3 972	790.9	1 887.6	265.8	8
A (1)	92	4 702	1 028.0	11 173.9	218.6	51
P	500	1 018	93.6	187.2	92.0	2
FIN (1)	81	1 087	279.0	3 444.4	256.7	13
S (2)	528	:	694.8	1 315.9	:	:
UK (2)	2 102	:	8 846.2	4 208.5	:	:
IS	:	:	:	:	:	:
NO	321	1 550	350.6	1 092.2	226.2	5
			Retail sale via stalls and markets (NACE 52.62)			
EU-15	:	:	:	:	:	:
B	:	5 851	318.9	:	54.5	:
DK	251	353	15.8	62.9	44.7	1
D (1)	16 955	44 094	2 907.5	171.5	65.9	3
EL		:	:	:	:	:
E	39 232	48 848	1 483.9	37.8	30.0	1
F	61 333	40 625	3 196.3	52.1	78.7	1
IRL	64	70	3.9	60.9	55.9	1
I	75 640	94 579	4 312.8	57.0	50.0	1
L (2)	56	:	:	:	:	:
NL (3)	11 355	12 539	1 532.2	126.9	134.0	1
A (1)	356	523	22.5	63.2	43.1	1
P	5 319	6 194	206.0	38.7	33.3	1
FIN (1)	259	194	11.3	43.6	58.5	1
S (2)	542	:	23.1	42.6	:	:
UK (2)	1 031		369.9	358.8	:	:
IS	:		:	:	:	:
NO	140	224	11.9	85.0	53.0	2
			Other non store retail sale (NACE 52.63)			
EU-15	:	:	:	:	:	:
B	:	1 684	191.1	:	113.5	:
DK	986	1 259	59.1	59.9	47.0	1
D (1)	17 153	56 779	10 890.6	634.9	191.8	3
EL	:	:	:	:	:	:
E	6 389	13 601	992.4	155.3	70.0	2
F	3 661	22 595	1 658.4	453.0	73.4	6
IRL	63	250	25.7	407.9	102.9	4
I	27 510	37 517	3 308.6	120.3	90.0	1
L (2)	136	344	49.1	361.0	142.8	3
NL (3)	5 965	10 374	654.6	156.0	101.8	2
A (1)	908	1 718	94.7	104.3	55.1	2
P	1 692	2 056	136.6	80.7	66.4	1
FIN (1)	603	464	36.3	60.2	78.3	1
S (2)	1 045	:	247.9	237.2	:	:
UK (2)	3 188	:	2 093.9	656.8	:	:
IS	:	:	:	:	:	:
NO	1 339	1 418	62.9	47.0	44.4	1

(1) 1998 data

(2) 1996 data

(3) 1995 data for turnover (total, per enterprise and per person employed)

Source: Eurostat SBS database

Productivity and operating figures show disparities across retailing activities

The values for turnover and value added per person employed (the latter is also called *apparent labour productivity*) for the sector observed show ***sales via mail order houses*** ahead of both the other two non-store retailing activities and the retailing sector as a whole.

Retail sale via stalls and markets and ***other non-store retail sale***, on the other hand, show values far below the average for total retailing in most countries (Figures 6 and 7).

While ***mail order*** sales can be described as a staff-extensive activity with a reasonably high level of automatic procedures, ***stalls and markets*** are strongly based on personal service and are thus staff-intensive, with less automation and less customer self-service.

Figure 7, showing the values for ***apparent labour productivity*** for each retailing activity observed and for total retailing, may serve to illustrate the economic effects of the structure described above for the two activities compared.

Gross operating surplus indicates the result of operational activities after compensation for the labour factor input. With regard to the efficiency of a business, measured by ***gross operating rate*** (gross operating surplus as a share of turnover), the picture for the activities observed appears to be different:

Mail order houses (as well as ***other non-store retailing*** for most countries) are below the total average for retailing, whereas ***stalls and markets*** are well above it (Figure 8).

However, figures on ***stalls and markets*** need to be looked at with caution: because such businesses are usually family-run and part of the proprietor's income may be included in the operating result, the figures may be somewhat inflated.

Figure 6: Turnover per person employed in total retail sales and retail sale not in stores, 1997

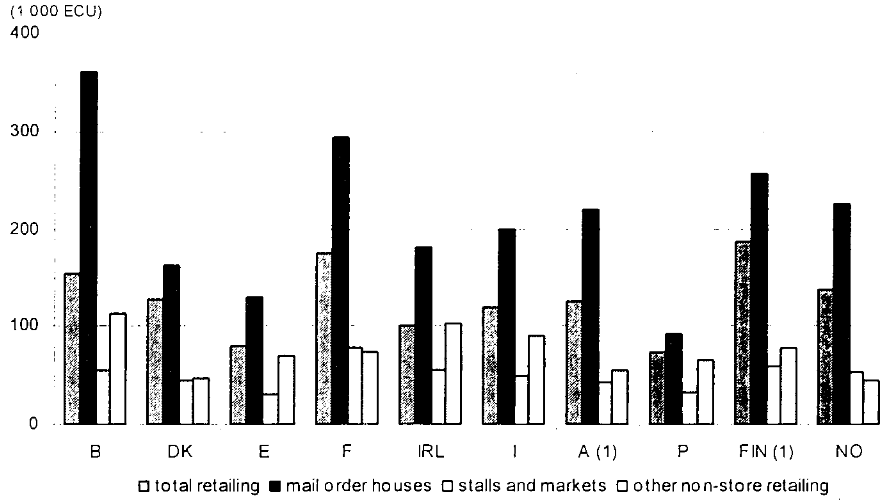


Figure 7: Apparent labour productivity in total retail sales and retail sale not in stores, 1997

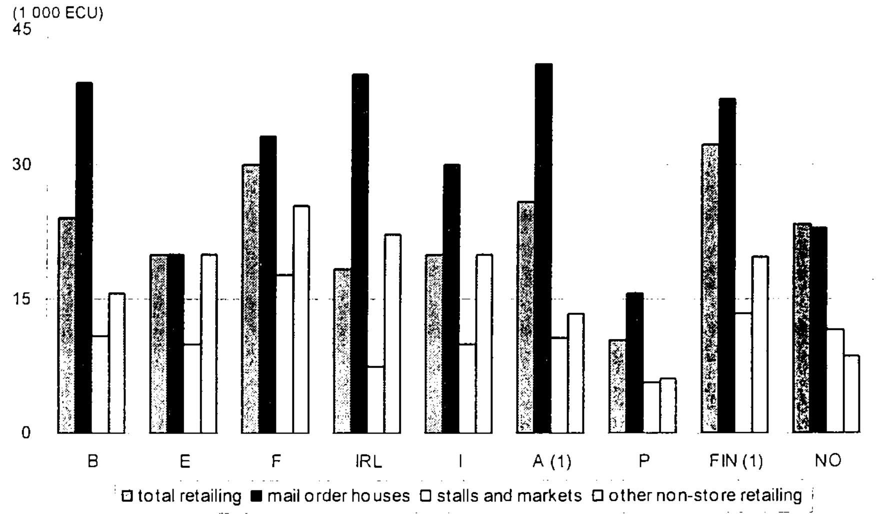
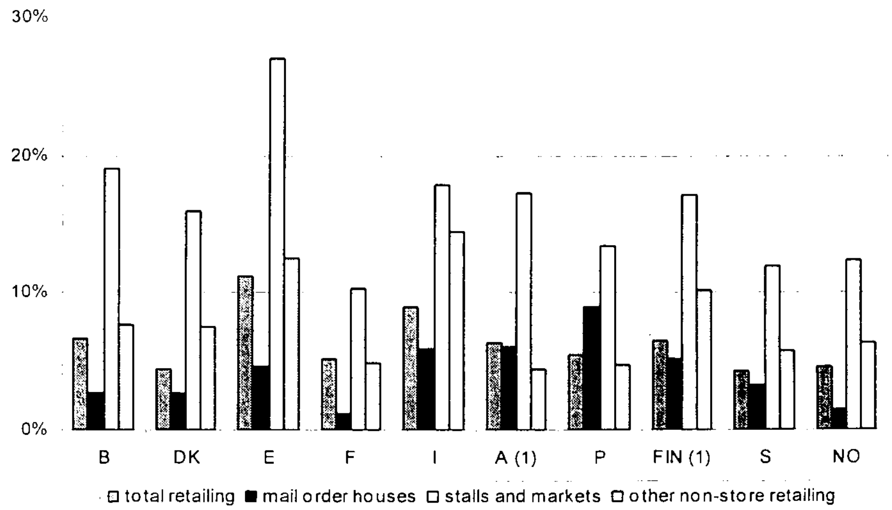


Figure 8: Gross operating rate in total retail sales and retail sale not in stores, 1997



(1) 1998 data

Source: Eurostat SBS database

Main productivity variables

For most European countries, figures on ***sales via mail order houses*** appear to show a similar pattern (relatively high apparent labour productivity with low operating rates). ***Portugal*** is different, however: of the reporting countries, it records not only by far the lowest turnover per person employed (see Table 2) and apparent labour productivity (ECU 15 700), but also the lowest unit labour cost (labour cost per employee: ECU 13 600), which gives it the highest gross operating rate (Table 3).

As regards ***sales via stalls and markets***, the ***Netherlands*** is far ahead of the other European countries in terms of both turnover per person employed and apparent labour productivity (ECU 134 000 and 31 000 respectively). France ranks second, with slightly more than half the Netherlands values (ECU 78 700 and 17 800).

For ***gross operating rates*** the top value (27.1%) is that of ***Spain;*** the Netherlands still rank third with 18.9%, just behind Belgium (19%), while France shows the lowest rate (10.3%). These differences are due to the unit labour cost values for these countries (Spain has the lowest and France the highest – Table 3).

Figures on unit labour costs reveal, as expected, that in all countries the labour costs of mail order houses exceed those of stalls and markets. While ***mail order houses*** usually engage 'skilled' workers, ***stalls and markets*** are usually family-run activities for which employment figures (and thus relative costs) are difficult to measure.

Other non-store retail sales show disparities amongst Member States. Apparent labour productivity values are in general between the values for the other two activities observed, with considerable differences between countries (ranging from ECU 6 100 in Portugal to ECU 25 400 in France).

This also applies to the unit labour cost variable: the Netherlands are at the bottom of the list with ECU 13 100, while Italy heads it with ECU 30 000.

Operating rates with values ranging from 4.4% for Austria (about the average for mail order) to 15.8% for the Netherlands can be derived from the above figures.

Table 3: Retail sale not in stores: main productivity variables, 1997

	Value added at factor cost (million ECU)	Apparent labour productivity (thousand ECU)	Unit labour cost (thousand ECU)	Gross operating surplus (million ECU)	Gross operating rate (%)
Retail sale via mail order houses (NACE 52.61)					
EU-15	:	:	:	:	:
B	61.3	39.2	30.2	15.0	2.6
DK (2)	:	:	20.0	5.7	2.7
D	:	:	:	:	:
EL	:	:	:	:	:
E	133.7	20.0	20.0	36.2	4.6
F	732.7	33.1	30.0	76.4	1.2
IRL	23.1	40.1	:	:	:
I	104.7	30.0	30.0	38.4	5.9
L	:	:	:	:	:
NL (5)	118.6	39.9	27.4	44.8	5.7
A (1)	193.9	41.2	28.0	63.0	6.1
P	15.9	15.7	13.6	8.4	9.0
FIN (1)	40.6	37.3	24.6	14.2	5.1
S (3)	115.9	:	29.5	21.9	3.2
UK	:	:	:	:	:
IS	:	:	:	:	:
NO	35.4	22.9	21.4	5.3	1.5
Retail sale via stalls and markets (NACE 52.62)					
EU-15	:	:	:	:	:
B	64.4	11.0	5.3	60.7	19.0
DK (2)	:	:	16.7	2.5	16.0
D	:	:	:	:	:
EL	:	:	:	:	:
E	438.7	10.0	10.0	402.1	27.1
F	724.0	17.8	24.5	330.0	10.3
IRL	0.5	7.6	:	:	:
I	837.5	10.0	20.0	772.5	17.9
L	:	:	:	:	:
NL (5)	354.0	31.0	12.9	290.2	18.9
A (1)	5.6	10.7	12.7	3.9	17.3
P	35.4	5.7	9.4	27.7	13.4
FIN (1)	2.6	13.3	15.4	1.9	17.1
S (3)	3.7	:	19.6	2.7	11.9
UK	:	:	:	:	:
IS	:	:	:	:	:
NO	2.6	11.5	12.2	1.5	12.4
Other non store retail sale (NACE 52.63)					
EU-15	:	:	:	:	:
B	26.3	15.6	24.7	14.7	7.7
DK (2)	:	:	15.1	4.5	7.5
D	:	:	:	:	:
EL	:	:	:	:	:
E	238.6	20.0	20.0	124.2	12.5
F	573.8	25.4	23.6	81.9	4.9
IRL	5.6	22.3	:	:	:
I	657.9	20.0	30.0	480.7	14.5
L (4)	8.4	24.4	19.0	4.5	9.2
NL (5)	139.6	21.7	13.1	103.4	15.8
A (1)	23.0	13.4	23.9	4.2	4.4
P	12.6	6.1	13.6	6.5	4.7
FIN (1)	9.1	19.7	19.0	3.7	10.2
S (3)	57.9	:	24.6	14.1	5.7
UK	:	:	:	:	:
IS	:	:	:	:	:
NO	12.1	8.6	21.6	4.0	6.4

(1) 1998 data
(2) 1996 data for unit labour cost
(3) 1996 data except for unit labour cost
(4) 1996 data
(5) 1995 data

Source: Eurostat SBS database

➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Database

This Statistics in Focus (SiF) is based on structural business statistics collected under the terms of Council Regulation (EC, EURATOM) No 58/97 of 20. December 1996. The reference data are stored in Eurostat's reference database *New Cronos* (theme 4 – domain SBS – collection enterpr - annual enterprise statistics – dft file *enter*).

The figures presented reflect the situation of the database as of 7 September 2000.

Statistical classification

The data are collected mainly according to the *statistical classification of economic activities in the European Community (NACE Rev. 1)*. This SIF deals with NACE Group **52.6 (Retail sale not in stores)**, which breaks down into the following classes:

52.61 Retail sale via mail order houses

52.62 Retail sale via stalls and markets

52.63 Other non-store retail sale

Variables

Number of enterprises

A count of the number of enterprises registered to the population concerned in the business register corrected for errors, in particular frame errors. Dormant units are excluded.

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.

Number of employees

The number of employees is defined as those persons who work for an employer and who have a contract of employment and receive compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind.

Number of part-time employees

A division of the number of employees calculated by reference to the number of hours worked per week for which they are paid; this number of hours is considered in relation to the length of what is considered to be a full-time working week in the Member State or the sector of the unit or the unit itself. Part-time workers are persons whose usual hours of work are less than the normal working hours. This definition encompasses all forms of part-time work (half-day work, work for one, two or three days a week, etc.).

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.

Value added at factor cost

Value added at factor cost is the gross income from operating activities after adjusting for operating subsidies and indirect taxes. It can be calculated from turnover, plus capitalised production, plus other operating income, plus or minus the changes in stocks, minus the purchases of goods and services, minus other taxes on products which are linked to turnover but not deductible, minus the duties and taxes linked to production.

Personnel costs

Personnel costs are defined as the total remuneration, in cash or in kind, payable by an employer to an employee in return for work done by the latter during the reference period. Personnel costs also include taxes and employees' social security contributions retained by the unit as well as the employer's compulsory and voluntary social contributions.

Gross operating surplus

Gross operating surplus is the surplus generated by operating activities after the labour factor input has been recompensed. It can be calculated from the value added at factor cost less the personnel costs. It is the balance available to the unit which allows it to recompense the providers of own funds and debt, to pay taxes and eventually to finance all or a part of its investment.

Apparent labour productivity

Apparent labour productivity is defined as value added per person employed.

Unit labour cost

Unit labour cost is defined as personnel costs per employee.

Gross operating rate

Gross operating rate is defined as gross operating surplus/ turnover.

The above SBS variables are laid down in Commission regulation (EC) No 2700/98 of 17 December 1998.

Further information on business statistics methodology is available from:

http://europa.eu.int/comm/eurostat/ramon/

or

http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/new/coded/en/all_business.htm

The above-mentioned regulations and statistical classification can be downloaded under 'legal texts'.

Further information:

- **Databases**

Title New Cronos, Domain SBS

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

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