



20 TRGOVINA IN DRUGE STORITVENE DEJAVNOSTI
DISTRIBUTIVE TRADE AND OTHER SERVICE ACTIVITIES

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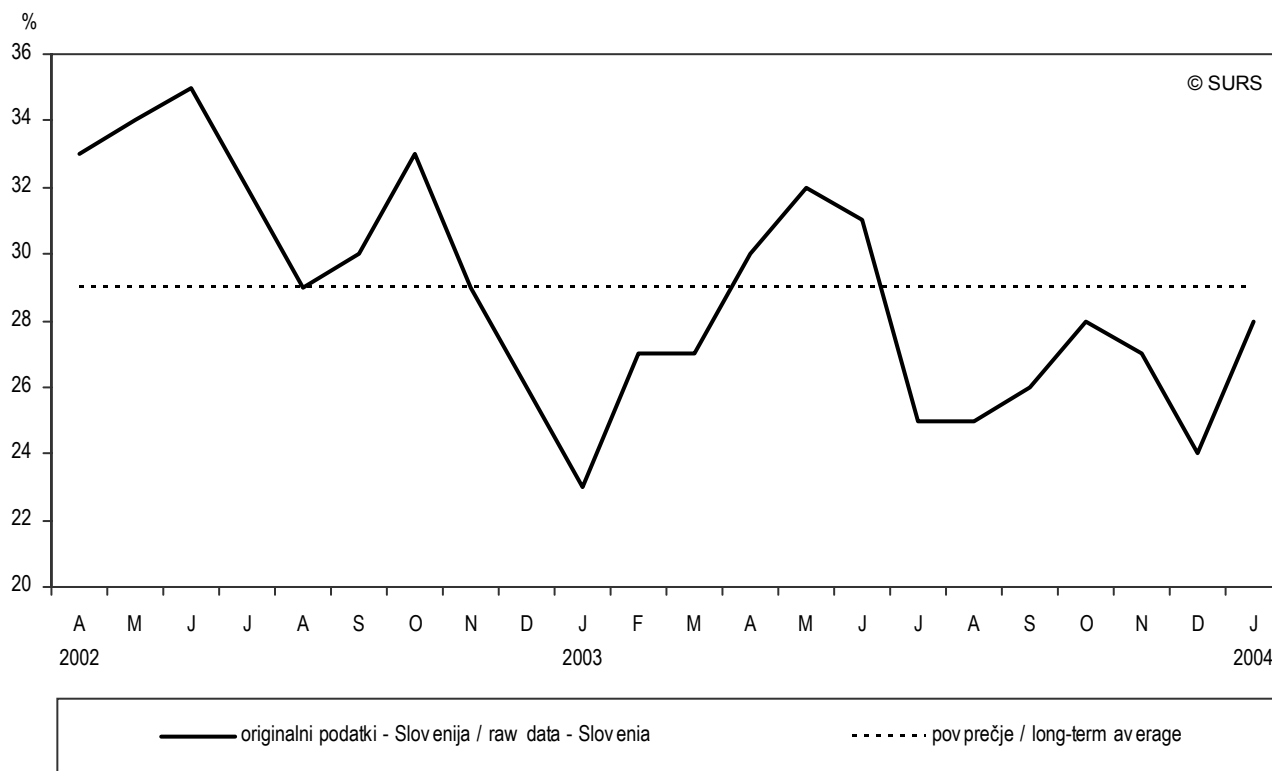
POSLOVNE TENDENCE V STORITVENIH DEJAVNOSTIH, SLOVENIJA, APRIL 2002 – JANUAR 2004

BUSINESS TENDENCY IN SERVICES, SLOVENIA, APRIL 2002 – JANUARY 2004

- Panelno anketo o poslovnih tendencah v storitvenih dejavnostih izvajamo v Sloveniji od aprila 2002 s poenotanim vprašalnikom, na podlagi poenotene metodologije in z enako periodiko, kakor jo izvajajo v državah članicah Evropske unije že več desetletij; to omogoča neposredno primerljivost podatkov.
- Namen kvalitativne Ankete o poslovnih tendencah v storitvenih dejavnostih (vprašalnik PA-STOR) je mesečno pridobivanje informacij o trenutnih stanjih glavnih ekonomskih kazalcev v storitvenih dejavnostih ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati anket so osnova za izračun kazalca zaupanja v storitvenih dejavnostih.
- We have been carrying out the Panel Survey on Business Tendency in Services in Slovenia since April 2002 with the harmonised questionnaire, methodology and periodicity, which have been used in EU Member States for several decades. Therefore, all data are directly comparable.
- The purpose of the qualitative Survey on Business Tendency in Services (questionnaire PA-STOR) is to get monthly information about current situations of major economic indicators in services and to evaluate their movement in the following months. The survey results are the basis for evaluation of the confidence indicator in services.

1. KAZALEC ZAUPANJA¹⁾ V SLOVENIJI, APRIL 2002 – JANUAR 2004

CONFIDENCE INDICATOR¹⁾ IN SLOVENIA, APRIL 2002 – JANUARY 2004



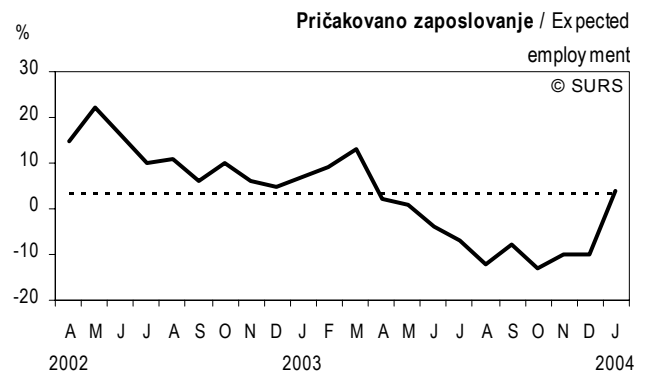
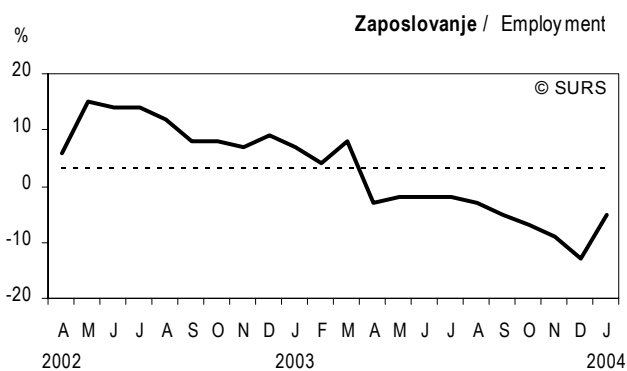
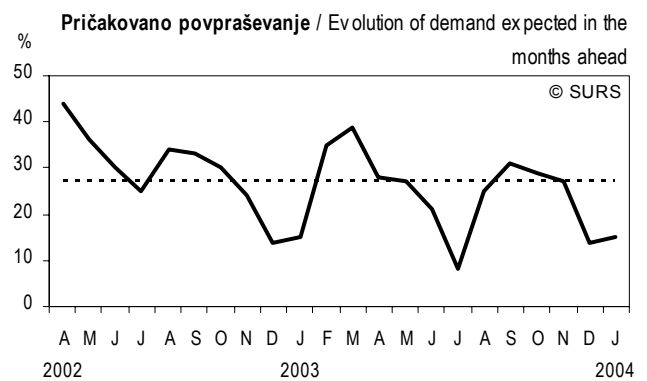
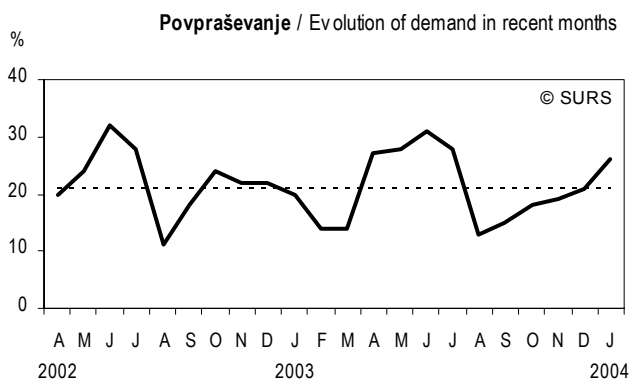
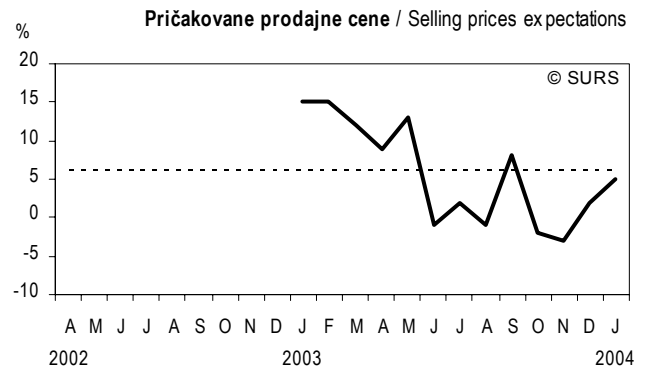
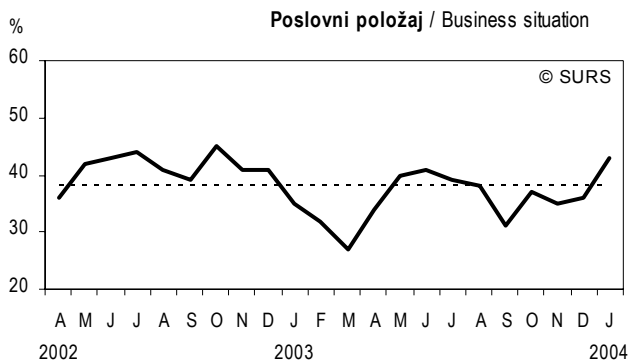
1) Kazalec zaupanja je povprečje ravnotežij na vprašanja o poslovnem položaju ter sedanjem in pričakovanem povpraševanju.
The confidence indicator is an average of responses (balances) to questions on business situation and present and expected demand.

2. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH, APRIL 2002 - JANUAR 2004

EVOLUTION OF ECONOMIC INDICATORS IN SERVICES IN SLOVENIA, APRIL 2002 - JANUARY 2004

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



— storitvenih dejavnosti
services

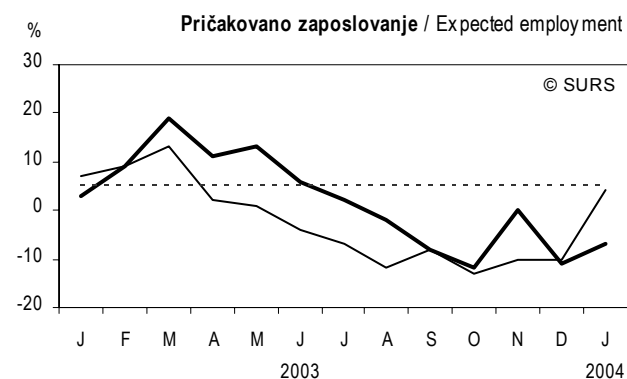
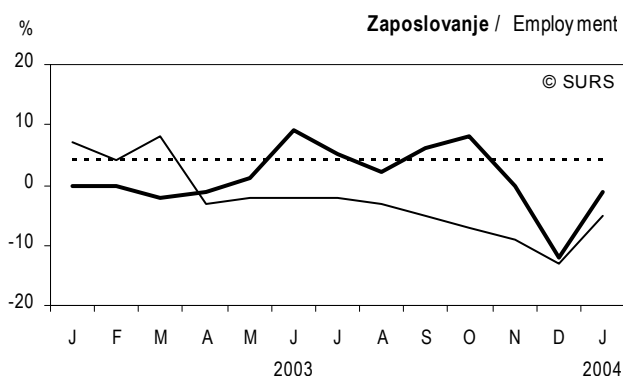
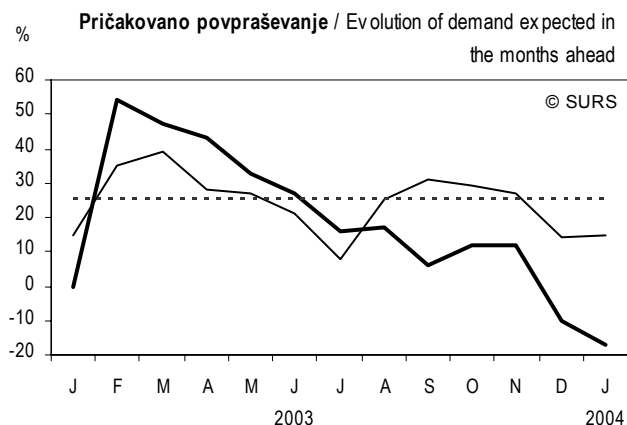
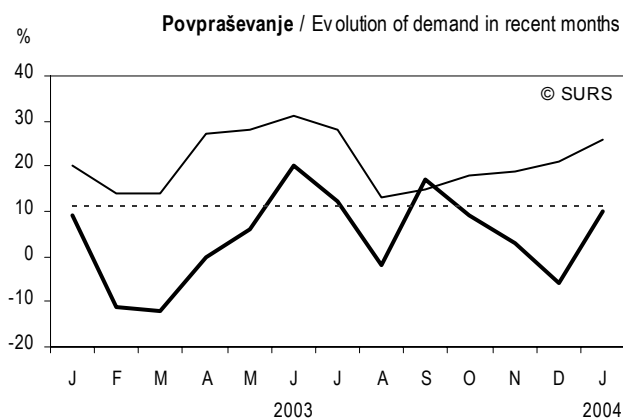
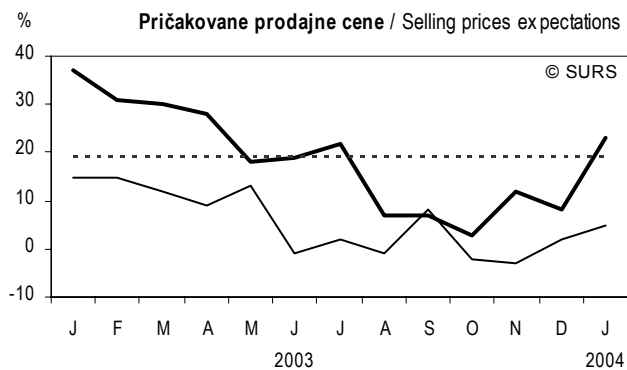
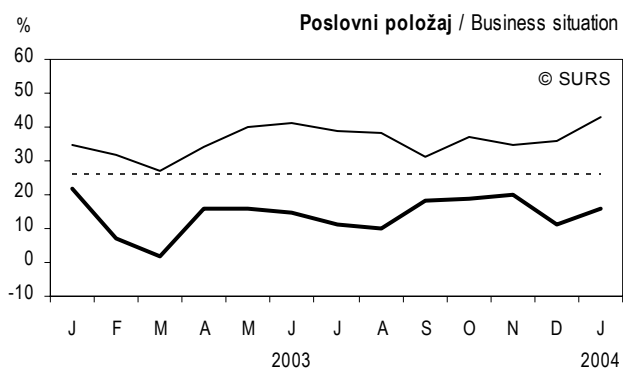
- - - povprečje
long-term average

2.1 Gibanje ekonomskih kazalcev v gostinstvu in s turizmom povezanih dejavnostih, januar 2003 - januar 2004

Evolution of economic indicators in hotels and restaurants and in tourist assistance activities, January 2003 - January 2004

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



— gostinstvo in s turizmom povezane dejavnosti
hotels and restaurants, and tourist assistance activities

— storitvenih dejavnostih
services

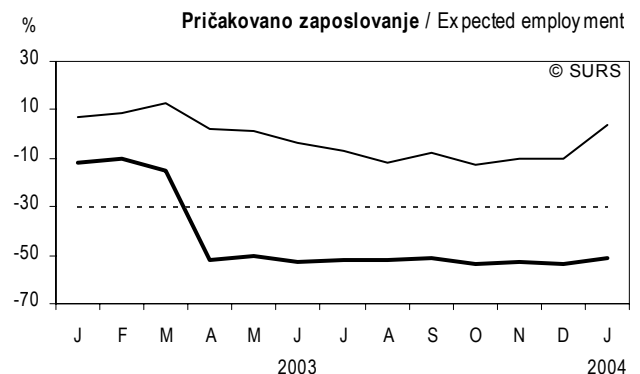
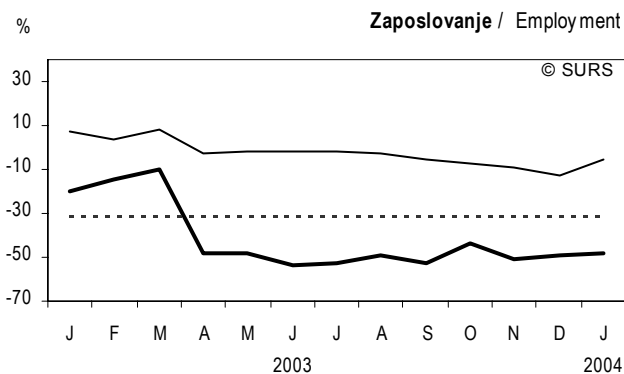
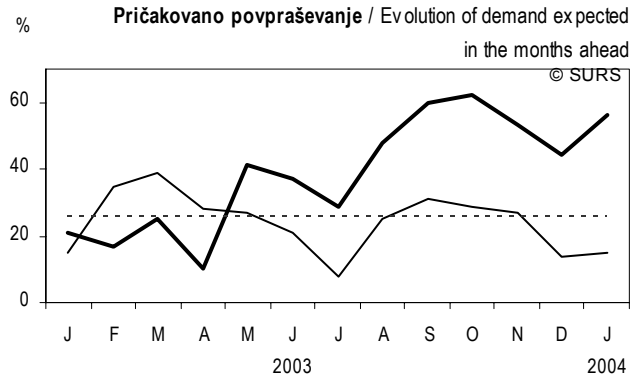
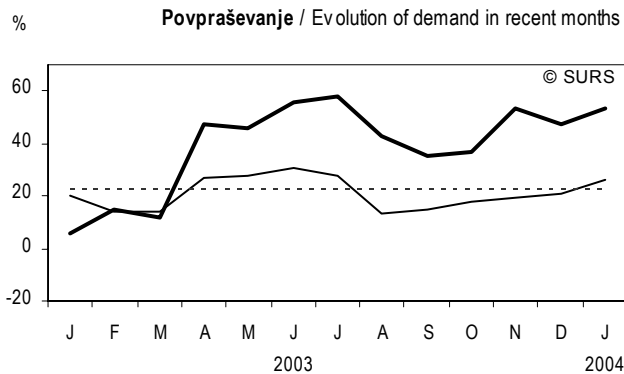
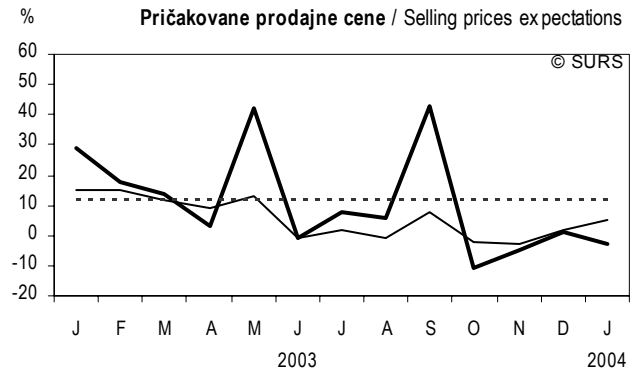
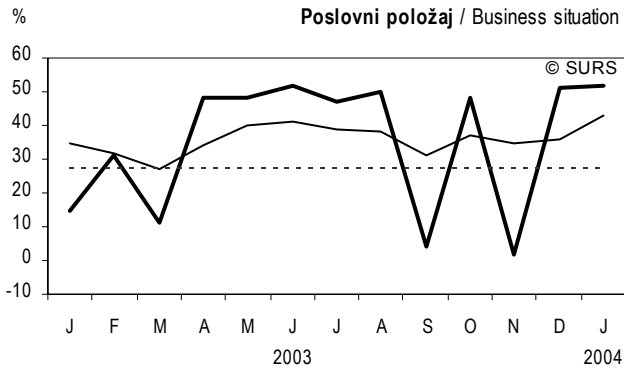
- - - - - povprečje
long-term average

2.2 Gibanje ekonomskih kazalcev v kopenskem, vodnem in zračnem prometu, januar 2003 - januar 2004

Evolution of economic indicators in land, water and air transport, January 2003 - January 2004

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



— kopenski, vodni in zračni promet
land, water and air transport

— storitvenih dejavnostih
services

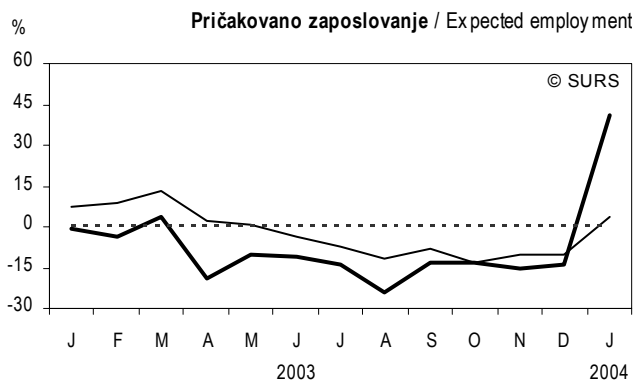
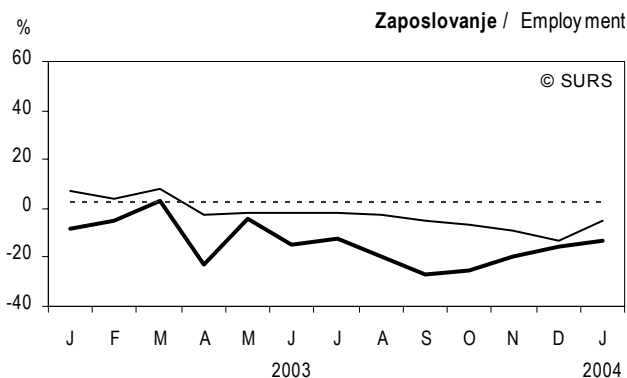
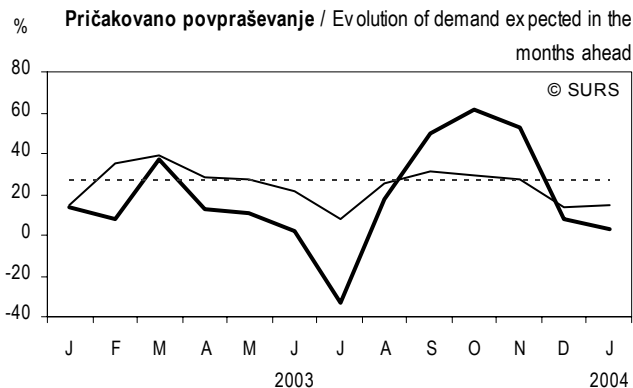
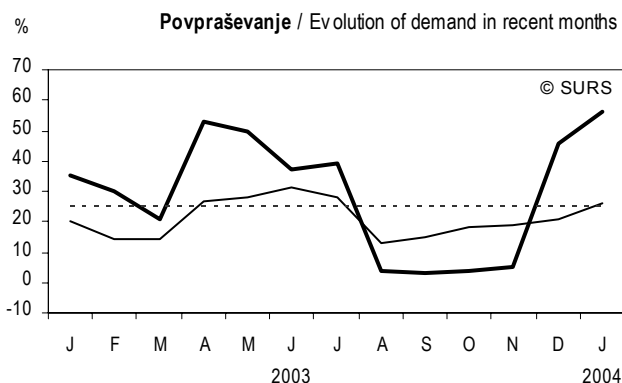
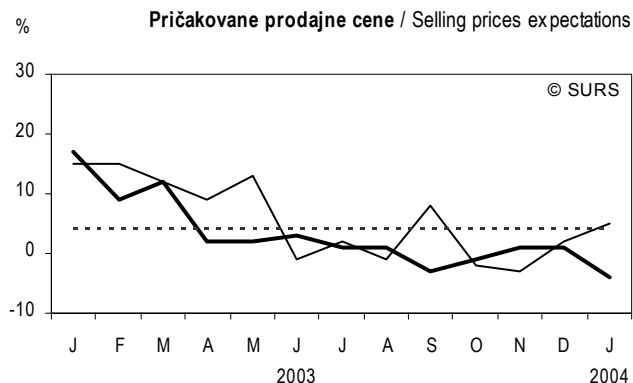
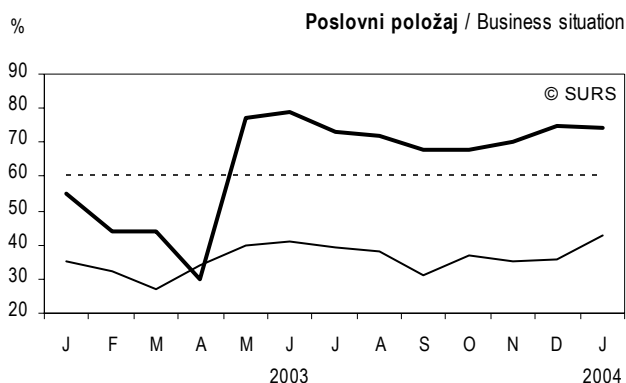
- - - povprečje
long-term average

2.3 Gibanje ekonomskih kazalcev za dejavnost: pošte, telekomunikacij in obdelava podatkov, januar 2003 - januar 2004

Evolution of economic indicators in post and telecommunication and in data processing, January 2003 - January 2004

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



— pošta, telekomunikacije in obdelava podatkov
post and telecommunication, data processing

— storitvenih dejavnostih
services

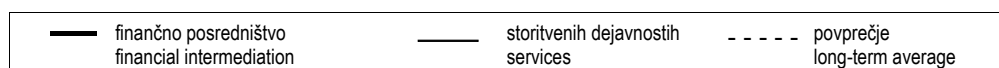
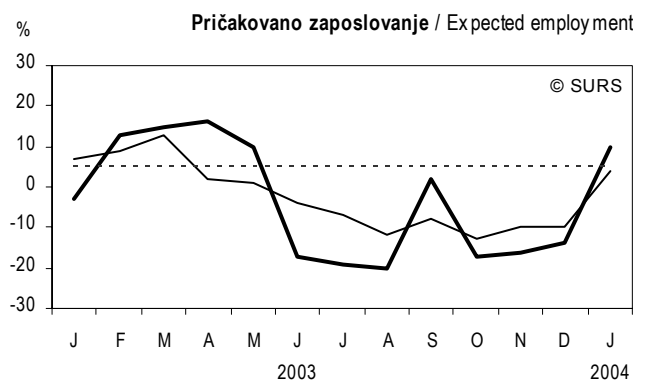
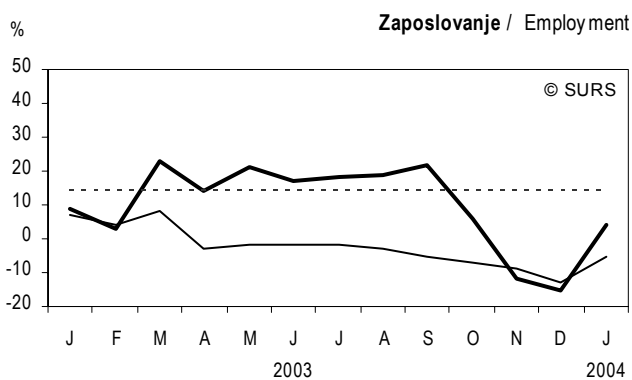
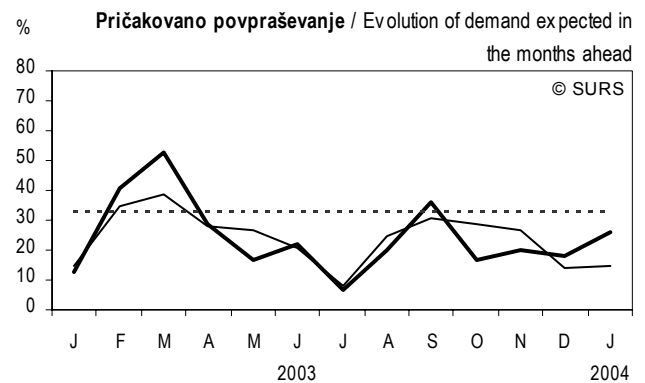
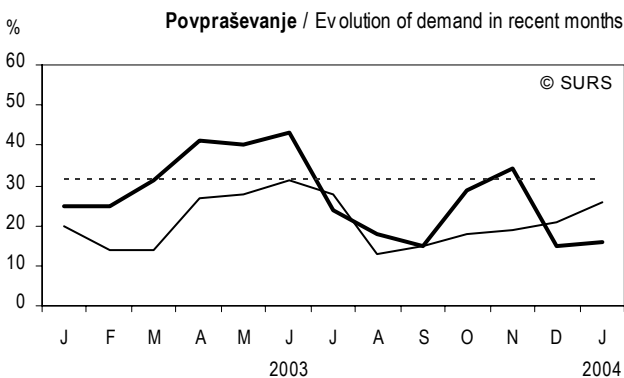
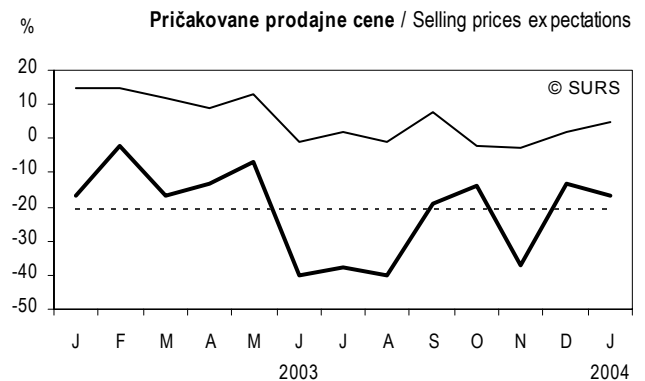
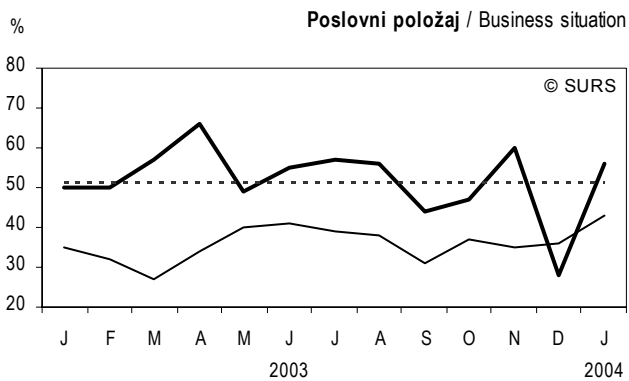
- - - povprečje
long-term average

2.4 Gibanje ekonomskih kazalcev za dejavnost: finančno posredništvo, januar 2003 - januar 2004

Evolution of economic indicators in financial intermediation, January 2003 - January 2004

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

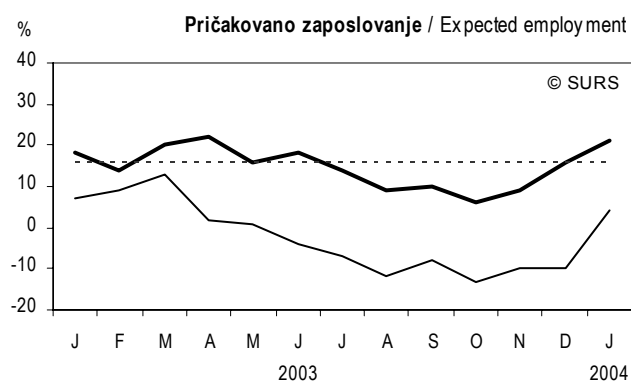
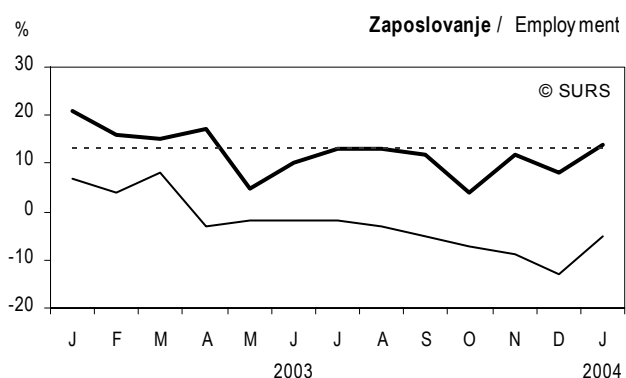
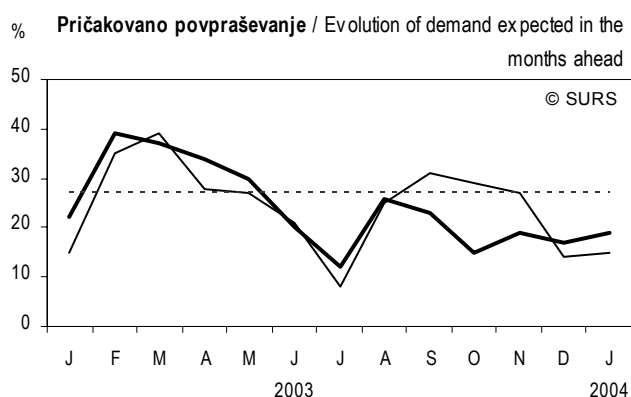
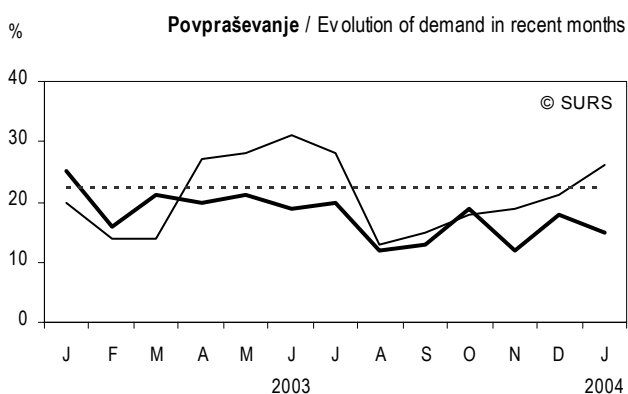
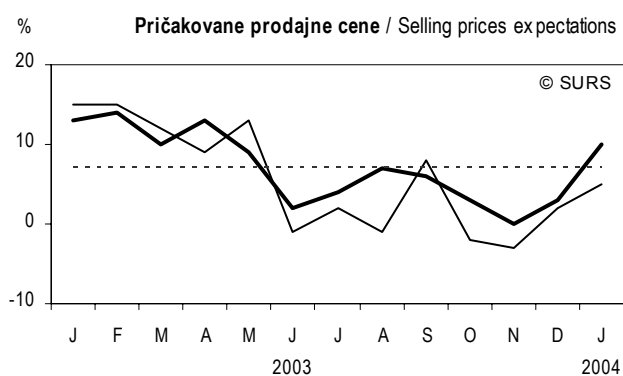
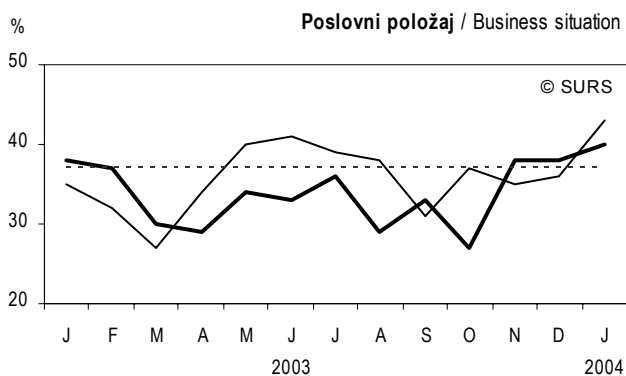


2.5 Gibanje ekonomskih kazalcev za dejavnost: poslovanje z nepremičninami, najem in poslovne storitve, januar 2003 - januar 2004

Evolution of economic indicators in real estate activities, renting and business services, January 2003 - January 2004

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



— poslovanje z nepremičninami, najem in poslovne storitve
real estate activities, renting and business services

— storitvenih dejavnostih
services

- - - - povprečje
long-term average

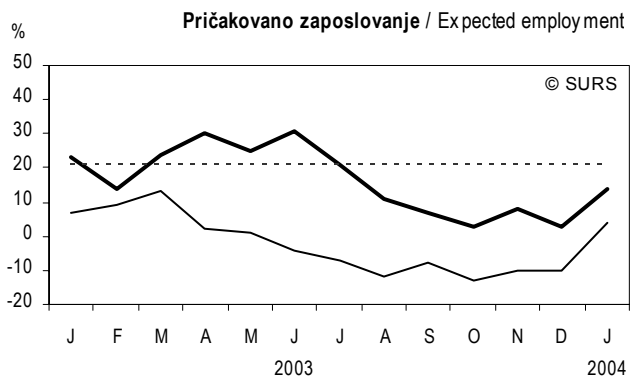
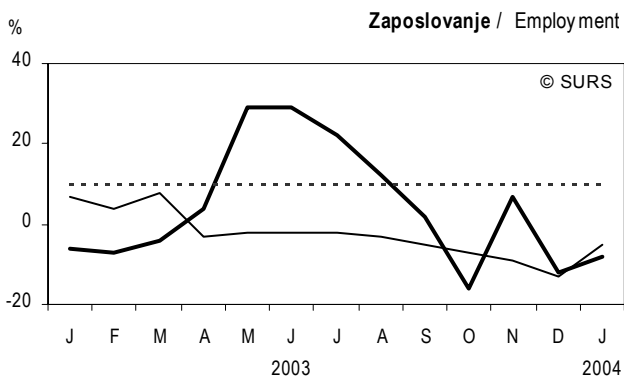
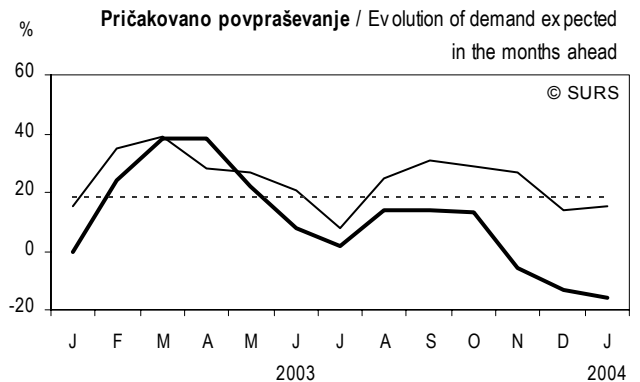
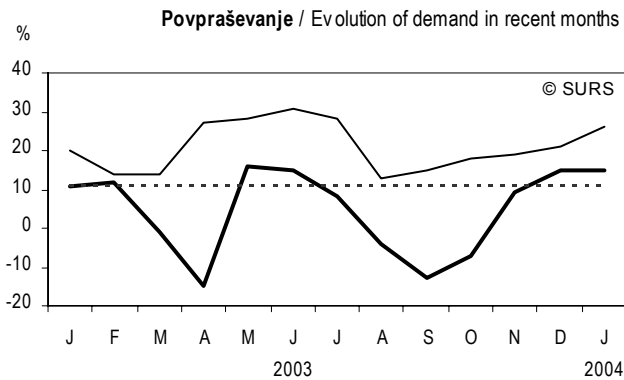
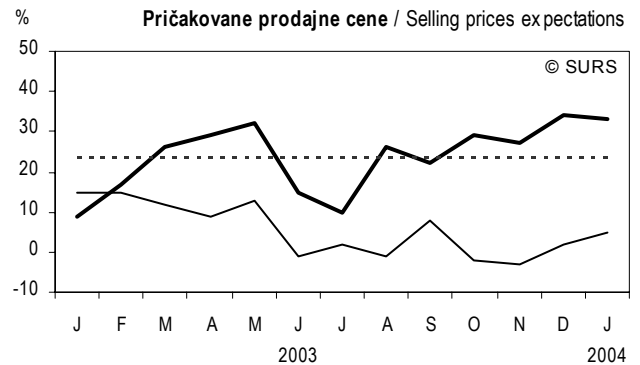
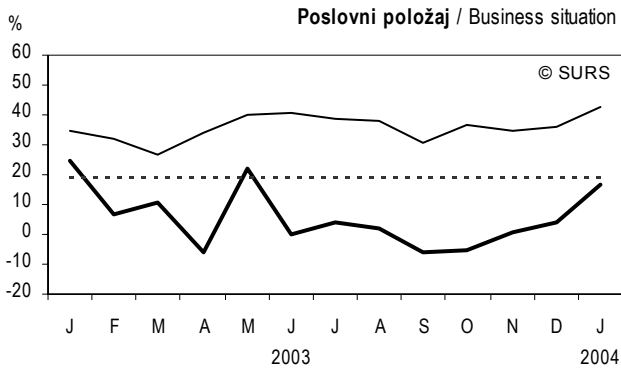


2.6 Gibanje ekonomskih kazalcev za dejavnost javne higiene in druge osebne storitvene dejavnosti, januar 2003 - januar 2004

Evolution of economic indicators in sewage disposal and other service activities, January 2003 - January 2004

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



— dejavnost javne higiene in druge osebne storitvene dejavnosti
sewage disposal and other service activities

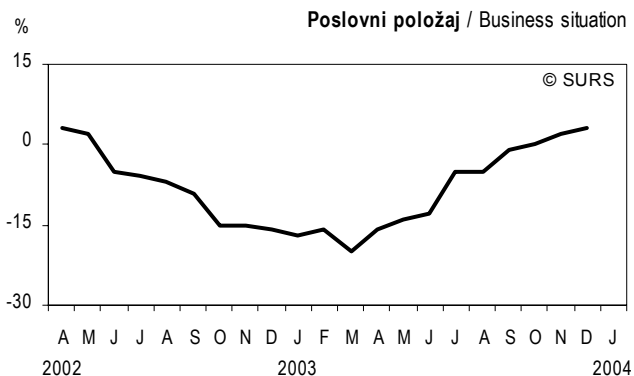
— storitvenih dejavnosti
services

- - - dolgoletno povprečje
long-term average

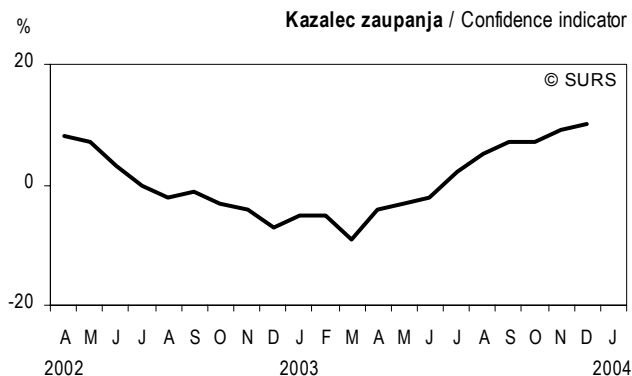


3. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V EU¹⁾, APRIL 2002 - JANUAR 2003 EVOLUTION OF ECONOMIC INDICATORS IN SERVICE IN THE EU¹⁾, APRIL 2002 - JANUAR 2003

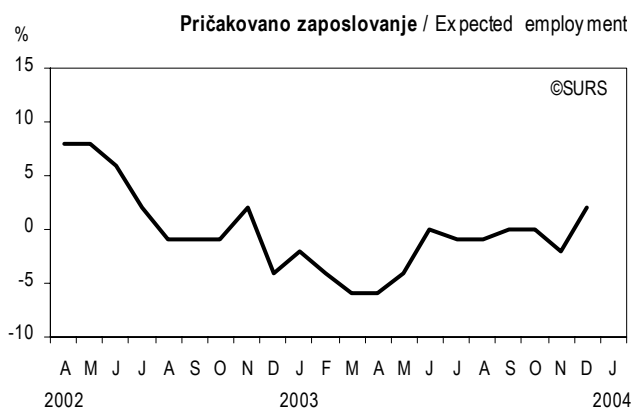
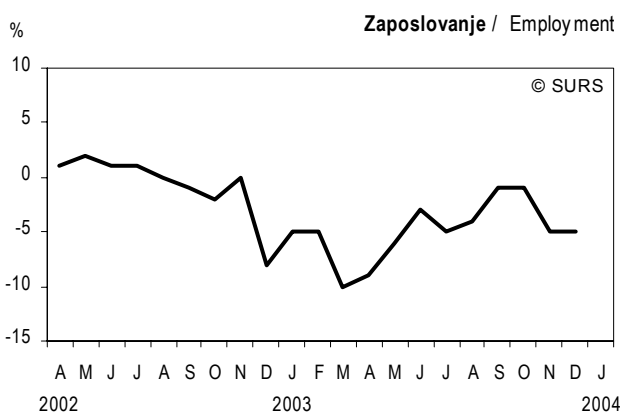
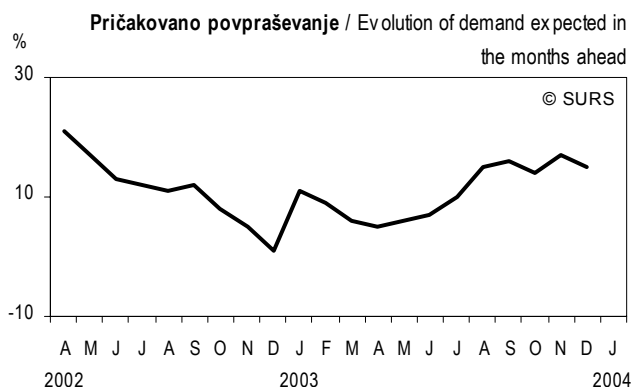
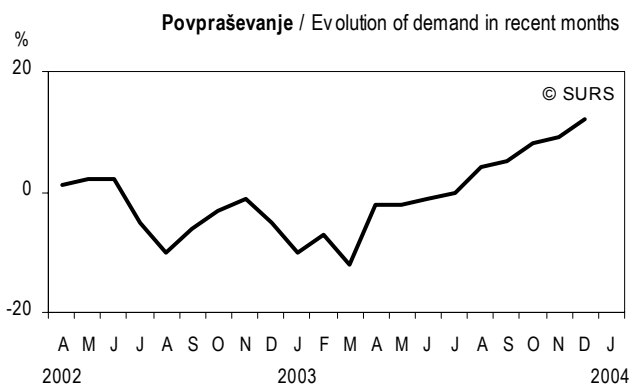
Ocena stanj / Appreciation of situation



Kazalec zaupanja / Confidence indicator



Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



1) Vir podatkov za EU je Evropska komisija; podatki so desezonirani. Podatki za zadnji mesec nam niso na voljo.
Data source for EU is the European Commission; data are seasonally adjusted. Data for the last month are not available.

METODOLOŠKA POJASNILA

Namen raziskovanja

Namen kvalitativne Ankete o poslovnih tendencah v storitvenih dejavnostih (vprašalnik PA-STOR) je mesečno pridobivanje informacij o trenutnih stanjih glavnih ekonomskih kazalcev ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati anket so osnova za izračun kazalca zaupanja v storitvenih dejavnostih.

Panelno anketo o poslovnih tendencah v storitvenih dejavnostih izvajamo v Sloveniji od aprila 2002 s poenotenim vprašalnikom, na podlagi poenotene metodologije in z enako periodiko, kakor jo izvajajo v državah članicah Evropske unije že več desetletij; to omogoča neposredno primerljivost podatkov.

Enote opazovanja

Opazujemo podjetja, ki so po Standardni klasifikaciji dejavnosti (SKD) razvrščena v storitveno dejavnost, in sicer:

- 55 – Gostinstvo
- 60 – Kopenski promet; cevovodni transport
- 61 – Vodni promet
- 62 – Zračni promet
- 63.3 – Dejavnost potovalnih agencij in organizatorjev potovanj; s turizmom povezane dejavnosti
- 64 – Pošta in telekomunikacije
- 65 – Finančno posredništvo, razen zavarovalništva in dejavnosti pokojninskih skladov
- 66 – Zavarovalništvo in dejavnost pokojninskih skladov, razen obveznega socialnega zavarovanja
- 67 – Pomožne dejavnosti v finančnem posredništvu
- 70 – Poslovanje z nepremičninami
- 71 – Dajanje strojev in opreme brez upravljavcev v najem; izposojanje izdelkov široke porabe
- 72 – Obdelava podatkov, podatkovne baze in s tem povezane dejavnosti
- 73 – Raziskovanje in razvoj
- 74 – Druge poslovne dejavnosti
- 90 – Dejavnosti javne higiene
- 93 – Druge storitvene dejavnosti

Vzorec podjetij je oblikovan na podlagi dveh meril:

- razvrstitve storitvenega podjetja po SKD in
- velikosti storitvenega podjetja (števila zaposlenih po Zakonu o gospodarskih družbah).

Vir podatkov

Na vprašalnik PA-STOR odgovarjajo direktorji podjetij ali drugi vodilni delavci med 1. in 10. v mesecu.

METHODOLOGICAL EXPLANATIONS

Purpose of the survey

The purpose of the qualitative Survey on Business Tendency in Services (questionnaire PA-STOR) is to get monthly information about current situations of major economic indicators and to evaluate their movement in the following months. The survey results are the basis for evaluation of the confidence indicator in services.

We have been carrying out the Panel Survey on Business Tendency in Services in Slovenia since April 2002 with the harmonised questionnaire, methodology and periodicity, which have been used in EU Member States for several decades. Therefore, all data are directly comparable.

Observation units

We are monitoring units that are registered in services according to the Standard Classification of Activities:

- 55 – Hotels and restaurants
- 60 – Land transport; transport via pipelines
- 61 – Water transport
- 62 – Air transport
- 63.3 – Activities of travel agencies and tour operators; tourist assistance activities
- 64 – Post and telecommunications
- 65 – Financial intermediation, except insurance and pension funding
- 66 – Insurance and pension funding, except compulsory social security
- 67 – Activities auxiliary to financial intermediation
- 70 – Real estate activities
- 71 – Renting of machinery and equipment without operator and of personal and household goods
- 72 – Data processing, database activities and other computer related activities
- 73 – Research and development
- 74 – Other business activities
- 90 – Sewage and refuse disposal, sanitation and similar activities
- 93 – Other service activities

The sample of enterprises was selected by two criteria:

- classification of the enterprise according to the Standard Classification of Activities,
- size of the enterprise (the number of employees in accordance with the Companies Act).

Data source

Persons responding to the monthly PA-STOR questionnaire are managers of enterprises or other executives. They respond between the 1st and the 10th of the month.



Zajetje

V panelni vzorec smo zajeli vsa velika in 98 % srednjevelikih podjetij (99 % zaposlenih v srednjevelikih podjetjih) ter 12 % malih podjetij (ali 15 % zaposlenih v malih podjetjih), ki so razvrščena v storitveno dejavnost. Panelni vzorec pokriva 18 % podjetij vzorčnega okvira ali 69 % zaposlenih v storitvenih dejavnostih.

Način zbiranja podatkov

Anketo izvajamo mesečno po pošti.

Definicije in pojasnila

Ravnotežje je razlika med pozitivnimi in negativnimi odgovori, izraženimi v odstotkih. Ravnotežja prikazujejo gibanje opazovanih ekonomskih kazalcev (stanj in pričakovanj), ne pa dejanskih velikosti ekonomskih kazalcev. Grafikon prikazuje ravnotežja po posameznih vprašanjih.

Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o poslovnem položaju ter sedanjem in pričakovanem povpraševanju po storitvah.

Objavljanje

Sodelujoči v anketi prejmejo mesečno informacijo o storitvenih dejavnostih.

Drugim uporabnikom so ti podatki prav tako dostopni na ravni storitvenih dejavnosti. Objavljamo jih mesečno v Statističnih informacijah.

VPRAŠANJA

Poslovni položaj v zadnjih 3 mesecih: dober, zadovoljiv, slab?

Povpraševanje v zadnjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?

Zaposlovanje v zadnjih treh mesecih: povečalo, ostalo enako, padlo?

Povpraševanje v naslednjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?

Zaposlovanje v naslednjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?

Prodajne cene v naslednjih mesecih: zvišale, ostale enake, znižale?

KOMENTAR

Poslovne tendence v storitvenih dejavnostih so se v primerjavi s preteklim mesecem izboljšale; kazalnik zaupanja je bil namreč za 4 odstotne točke višji; za 1 odstotno točko pa je presegel tudi lansko povprečje.

Na gibanje kazalnika zaupanja sta vplivali ocena sedanjega poslovnega položaja in ocena povpraševanja.

Kazalniki pričakovanj in stanj so se izboljšali.

Coverage

The panel includes all large and 98% of medium-sized enterprises (99% employees of medium-sized enterprises) and 12% of small enterprises (or 15% employees of small enterprises), the principal activity of which is classified into services. The panel covers 18% of the enterprises of the studied population or 69% of employees in services.

Method of data collection

The survey is carried out monthly by mail.

Definitions and explanations

The balance is the difference between positive and negative answers, expressed in percent. The balance shows the movement of observed economic indicators (present situation and future expectations), and not the real size of economic indicators. The charts show the balance by individual questions.

The **confidence indicator** is the arithmetic mean of responses (balances) to the questions on business situation, and present and expected demand.

Publishing

Persons participating in the survey get the monthly information on services.

Other users can also get data for services published monthly in Rapid Reports.

QUESTIONS

Business situation over the past 3 months: improved, remained unchanged, deteriorated?

Demand over the past 3 months: increased, remained unchanged, decreased?

Employment over the past 3 months: increased, remained unchanged, decreased?

Demand over the next 3 months: increase, remain unchanged, decrease?

Employment over the next 3 months: increase, remain unchanged, decrease?

Prices over the next 3 months: increase, remain unchanged, decrease?

COMMENT

Business tendencies in services improved compared to the previous month; the confidence indicator was namely 4 percentage points higher and 1 percentage point above last year's average.

The confidence indicator was influenced by the appreciation of the present business situation and expected demand.

Expectations improved as did the appreciation of situation.



POSLOVNI POLOŽAJ

Direktorji ocenjujejo, da je bil poslovni položaj v zadnjih treh mesecih boljši; kazalnik je namreč v vseh treh primerjavah pokazal višje vrednosti: glede na pretekli mesec je bil višji za 7 odstotnih točk, glede na lanski januar in lansko povprečje pa za 8 odstotnih točk.

POVPRAŠEVANJE

Tudi povpraševanje po storitvah je bilo v zadnjih mesecih boljše, saj je kazalnik v vseh treh primerjavah dosegel višje vrednosti: glede na december 2003 in lansko povprečje je bil višji za 5 odstotnih točk, glede na lanski januar pa za 6 odstotnih točk. Po ocenah direktorjev se bo povpraševanje v naslednjih treh mesecih le nekoliko povečalo (za 1 odstotno točko). Njihova ocena je v primerjavi z istim mesecem lani enaka, glede na lansko povprečje pa za 10 odstotnih točk nižja.

ZAPOSLOVANJE

Zaposlovanje se je po ocenah direktorjev v zadnjih treh mesecih povečalo. Kazalnik zaposlovanja je bil namreč za 8 odstotnih točk višji kot decembra 2003, vendar pa hkrati nižji kot januarja 2003 (za 12 odstotnih točk) in nižji od lanskega povprečja (za 3 odstotne točke). Tudi v prihodnosti pričakujejo povečanje zaposlovanja: kazalnik pričakovanega zaposlovanja je bil glede na pretekli mesec za 14 odstotnih točk višji; za 7 odstotnih točk je bil višji tudi od lanskega povprečja. Glede na isti mesec lani pa je bil za 3 odstotne točke nižji.

PRODAJNE CENE

Direktorji ocenjujejo, da se bodo prodajne cene v naslednjih mesecih zvišale; kazalnik je bil namreč za 3 odstotne točke višji kot prejšnji mesec. Vendar pa je bil hkrati nižji od lanskih vrednosti – za 10 odstotnih točk je bil nižji kot januarja 2003, za 1 odstotno točko nižji pa od lanskega povprečja.

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BUSINESS SITUATION

Managers estimated that the business situation in the past three months was better. The indicator was higher in all three comparisons: compared to the previous months by 7 percentage points and compared to January 2003 and the 2003 average by 8 percentage points.

DEMAND

Demand for services was also higher in recent months as the indicator was higher in all three comparisons: compared to December 2003 and last year's average by 5 percentage points and compared to January 2003 by 6 percentage points. Managers think that in the next three months demand will increase only slightly (by 1 percentage point). Their estimate was the same as in January 2003, while compared to the 2003 average it was 10 percentage points lower.

EMPLOYMENT

According to managers' estimates, employment rose in the past three months. The employment indicator was namely 8 percentage points higher than in December 2003, but at the same time 12 percentage points lower than in January 2003 and 3 percentage points lower than last year's average. Managers predicted a rise in employment: the indicator of expected employment was 14 percentage points higher than in December 2003 and 7 percentage points higher than the average of 2003. Compared to January 2003, the indicator was down by 3 percentage points.

SELLING PRICES

Managers estimated that selling prices would rise in the next few months. The indicator was 3 percentage points higher than in December 2003. However, it was also 10 percentage points lower than in January 2003 and 1 percentage point lower than last year's average.

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