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Services and Distribution

- Retail sales decreased by 0.9% in volume and 2.5% in value in 2011.
- Retail sales of automotive fuel decreased by 9% in 2011.
- 31% of all turnover in the distribution and services sectors was generated by wholesale trade (excluding motor vehicles and motorcycles) and amounted to €58bn.
- Retail trade (excluding motor vehicles and motorcycles) accounted for 18% of enterprises, and 24% of persons engaged, in the distribution and services sectors.

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Introduction

This chapter contains information on the services sector. The information sources are the Annual Services Inquiry and the Retail Sales Index series.

The annual inquiry provides information on the structure of the services sectors with principal and supplementary aggregates given in the tables. Short-term indicators of activity in the retail trade sectors are provided by the Retail Sales Index which gives the monthly change in the value and volume of retail sales for various classes of retail businesses.

Annual Services Inquiry

The annual surveys provide details of the principal trading aggregates for all enterprises in the relevant sectors. The enterprise was the unit used for survey purposes, ie one return was sought in respect of each enterprise covering all constituent branches.

Retail Sales Index

The primary purpose of the RSI is to provide a short-term indication of changes in the value and volume (or quantity) of retail sales in Ireland. In doing so the RSI provides a leading monthly indicator on economic activity. It provides an accurate and objective measure of retail trading and supplies a valuable guide to consumer spending behaviour in the Irish economy. More generally, in conjunction with several other monthly and quarterly economic indicators published by the CSO, the RSI offers a valuable tool for better understanding the general economic climate and performance in Ireland.

Technical Notes

Retail Sales Index

Tables 13.1 and 13.2 give value indices and volume indices respectively for 13 categories of business and combined groups for each of the years 2007 to 2011 to base year 2005=100 and NACE Rev. 2.

Annual surveys

A combination of a census and a stratified random sample was selected. All enterprises with 20 or more persons engaged in the services and distribution sectors were selected, while decreasing sampling proportions were taken in the following lower persons engaged ranges:

10-19 persons
1-9 persons.

The business classification used for these inquiries is the Statistical Classification of Economic Activities in the European Community (NACE Rev. 2).

All relevant tables

Turnover (excluding VAT) and Purchases of Goods for Direct Resale (excluding VAT) indicated for NACE 45 include Vehicle Registration Tax.

Gross Value Added is Gross Margin minus Purchases of other Goods and Services (including VAT) plus subsidies minus indirect taxes.

Persons Engaged and employment details shown relate to the week ending 11 September 2009.

Table 13.1 Value indices of retail sales

Base year 2005=100

Business	2007	2008	2009	2010	2011
Motor trades	116.5	96.6	53.1	61.3	63.0
Retail sale in non-specialised stores with food, beverages or tobacco predominating	120.8	125.6	117.7	117.4	116.0
Department stores	112.0	106.3	90.2	90.2	86.4
Retail sale of food, beverages and tobacco in specialised stores	106.1	106.7	98.0	92.4	87.3
Retail sale of automotive fuel	115.0	119.3	100.0	105.9	107.5
Retail sale of pharmaceutical, medical and cosmetic articles	118.8	121.0	116.5	110.9	102.4
Retail sale of textiles, clothing and footwear	114.8	109.4	91.7	88.7	85.4
Retail sale of furniture and lighting	115.2	93.9	66.2	61.8	54.6
Retail sale of hardware, paints and glass	118.8	108.8	88.4	83.1	77.2
Retail sale of electrical goods	115.7	102.6	82.0	79.5	75.6
Retail sale of books, newspapers and stationery	107.8	102.1	87.0	80.3	72.4
Other retail sales	116.3	112.2	91.5	87.5	80.4
Bars	105.0	101.8	92.9	82.3	76.4
All retail businesses, excluding motor trades	115.8	114.9	102.1	99.5	96.0
All retail businesses	116.0	110.8	90.9	90.8	88.5
Combined groups					
All retail businesses, excluding motor trades and bars	117.2	116.6	103.3	100.0	98.6
Motor trades and automotive fuel	116.2	101.4	63.1	68.9	72.4
All retail businesses, excluding motor trades, automotive fuel and bars	117.5	116.4	103.6	99.6	97.8
Retail sale of food	119.5	124.0	116.0	113.1	113.5
Retail sale of non food products, excluding motor trades, automotive fuel and bars	115.5	109.0	91.7	86.6	82.6
Retail sale of household equipment	116.8	103.3	81.4	76.1	72.2
Retail sale of books, newspapers, stationery and other goods	114.8	110.4	90.7	84.6	79.0

Source: CSO

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Table 13.2 Volume indices of retail sales

Base year 2005=100

Business	2007	2008	2009	2010	2011
Motor trades	113.6	93.4	53.5	64.4	68.4
Retail sale in non-specialised stores with food, beverages or tobacco predominating	116.1	113.6	107.2	116.0	103.5
Department stores	116.1	113.6	107.2	116.0	111.7
Retail sale of food, beverages and tobacco in specialised stores	101.9	98.1	92.5	91.4	86.0
Retail sale of automotive fuel	103.3	107.0	102.3	93.6	85.2
Retail sale of pharmaceutical, medical and cosmetic articles	119.0	119.9	118.8	118.0	111.1
Retail sale of textiles, clothing and footwear	120.9	120.7	114.1	118.2	117.0
Retail sale of furniture and lighting	123.0	103.9	79.0	77.4	72.7
Retail sale of hardware, paints and glass	116.5	106.4	89.2	84.7	80.5
Retail sale of electrical goods	136.5	134.2	121.1	126.2	131.0
Retail sale of books, newspapers and stationery	102.3	93.5	79.8	72.5	65.9
Other retail sales	122.0	118.6	108.8	102.8	94.3
Bars	98.9	92.1	82.9	74.3	70.2
All retail businesses, excluding motor trades	114.4	111.5	104.1	103.0	100.3
All retail businesses	114.2	107.4	92.7	93.9	93.1
Combined groups					
All retail businesses, excluding motor trades and bars	116.4	114.1	106.9	106.8	104.2
Motor trades and automotive fuel	112.2	95.3	62.0	67.4	70.6
All retail businesses, excluding motor trades, automotive fuel and bars	117.3	115.2	108.2	108.9	106.7
Retail sale of food	116.5	115.9	111.5	112.7	112.0
Retail sale of non food products, excluding motor trades, automotive fuel and bars	118.2	114.5	105.0	105.3	101.7
Retail sale of household equipment	126.2	117.7	100.7	100.8	100.3
Retail sale of books, newspapers, stationery and other goods	118.4	114.1	103.5	97.3	89.2

Source: CSO

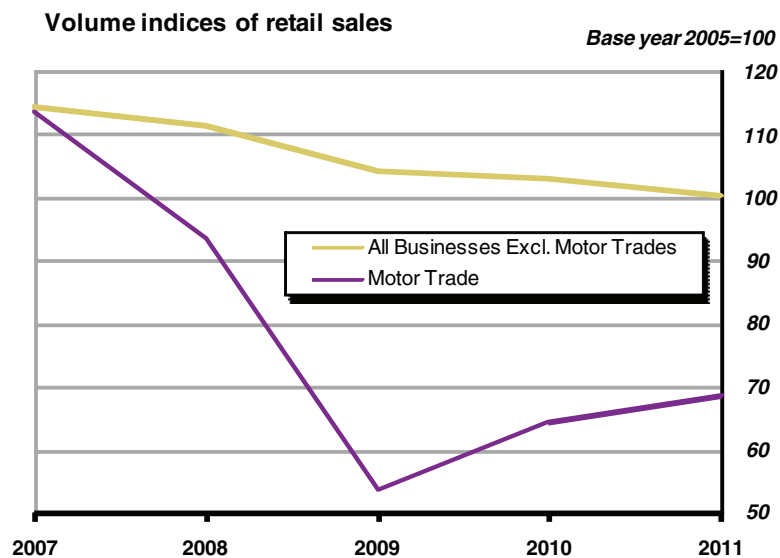


Table 13.3 Principal aggregates Annual Services Inquiry, 2009

	NACE Rev. 2	No. of enterprises	Turnover excluding VAT €m	Gross value added €m	Persons engaged
Motor trades	45	6,336	7,627	961	30,381
Wholesale trade	46	10,326	58,153	7,432	92,606
Retail trade	47	21,933	34,120	6,586	216,229
Land transport	49	6,866	3,450	1,688	38,760
Water transport	50	75	475	120	858
Air transport	51	53	4,555	1,066	8,494
Warehousing and support activities for transportation	52	1,030	2,950	1,073	16,520
Postal and courier activities	53	2,115	1,574	908	17,602
Accommodation	55	2,216	2,568	1,105	47,898
Food and beverage service activities	56	13,007	5,825	2,166	100,709
Picture, video and television programmes, sound recording and music publishing activities	59	1,060	444	177	4,594
Programming and broadcasting activities	60	90	397	249	4,295
Telecommunications	61	372	5,432	2,114	14,256
Publishing, computer programming and consultancy and information service activities	58,62,63	5,848	34,028	6,912	43,955
Real estate activities	68	7,753	1,598	823	20,790
Legal and accounting activities	69	8,819	4,118	3,134	43,698
Activities of head offices; management consultancy activities	70	4,681	1,905	956	15,205
Architectural and engineering activities; technical testing and analysis	71	6,373	3,200	1,282	24,758
Scientific research and development	72	309	779	296	4,452
Advertising and market research	73	818	1,093	380	7,444
Other professional, scientific and technical activities	74	4,247	706	321	9,077
Veterinary activities	75	994	289	143	3,105
Renting and leasing activities	77	2,622	3,303	1,295	11,783
Employment activities	78	845	1,224	722	21,532
Travel agency, tour operator and other reservation service and related activities	79	495	1,565	239	5,007
Security and investigation activities	80	775	724	511	14,592
Services to buildings and landscape activities	81	3,273	938	600	29,800
Office administrative, office support and other business support activities	82	1,531	1,175	685	15,649
Other service activities	92,93,95,96	9,818	3,661	1,892	54,500
Total	All	124,680	187,874	45,838	918,549

Source: CSO

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Table 13.4 Family business principal aggregates Annual Services Inquiry, 2009

Family/ Non-family business	NACE Rev. 2 Section	No. of enterprises	Turnover excluding VAT €m	Gross value added €m	Persons engaged
Family Business	G	28,210	40,442	6,486	196,022
Non-Family Business		10,385	59,459	8,493	143,194
Total Section G		38,594	99,900	14,979	339,216
Family Business	H	7,061	2,843	1,041	29,056
Non-Family Business		3,079	10,161	3,815	53,177
Total Section H		10,140	13,004	4,856	82,233
Family Business	I	12,230	5,164	1,990	94,216
Non-Family Business		2,993	3,228	1,281	54,391
Total Section I		15,223	8,392	3,271	148,607
Family Business	J	3,576	1,057	504	10,567
Non-Family Business		3,794	39,244	8,948	56,532
Total Section J		7,370	40,301	9,452	67,100
Family Business	L	4,602	806	412	10,677
Non-Family Business		3,151	792	411	10,113
Total Section L		7,753	1,598	823	20,790
Family Business	M	14,071	2,463	1,487	35,319
Non-Family Business		12,169	9,626	5,026	72,420
Total Section M		26,240	12,089	6,513	107,738
Family Business	N	6,545	2,807	1,113	36,357
Non-Family Business		2,997	6,121	2,940	62,006
Total Section N		9,542	8,928	4,052	98,363
Family Business	92,93,95,96	5,285	1,380	690	24,836
Non-Family Business		4,533	2,282	1,202	29,664
Total other service activities (92,93,95,96)		9,818	3,661	1,892	54,500
ALL		124,680	187,874	45,838	918,547

Source: CSO

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Table 13.5 Exports and imports of goods and services for services sectors with 20 or more employees by NACE Rev. 2 in the State, 2009

Principal activity	NACE REV. 2	Total no. of enterprises	Turnover excl. VAT €m	Gross value added €m	Total exports of goods and services excl. VAT €m	Total imports of goods and services excl. VAT €m
Wholesale and retail trade; repair of motor vehicles and motorcycles (G)	G	2,514	72,813	10,282	10,363	12,354
<i>Motor trades (45)</i>	45	277	4,249	423	153	731
<i>Wholesale trade (46)</i>	46	881	46,273	5,453	10,028	8,256
<i>Retail trade (47)</i>	47	1,356	22,291	4,405	182	3,367
Transportation and storage (H)	H	380	10,205	3,777	1,063	794
Accommodation and food service activities (I)	I	1,496	4,968	2,132	0	37
Information and communication (J)	J	428	37,582	8,554	23,966	14,306
Real estate activities (L)	L	81	341	202	2	0
Professional, scientific and technical activities (M)	M	627	7,042	3,344	2,136	558
Administrative and support service activities (N)	N	589	5,381	2,659	350	219
Other service activities (92,93,95,96)	92,93,95,96	382	1,872	1,070	50	29
Total		6,497	140,203	32,018	37,932	28,298

Source: CSO

