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Services and Distribution

- The largest growth in enterprises in percentage terms was in the Real Estate, Renting & Business Services Sector at 11%.
- Motor Trades sectors best showing since the millennium.
- Retail Sales increased by 7.8% in value during 2006.
- Bars show first real increase in volume of sales since 2002.

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Introduction

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

The annual inquiries provide 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 surveys

The annual surveys provide estimates 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.

Results for the wholesale and retail trade

The turnover of retail, motor-trades and wholesale enterprises increased from €74.3bn in 2003 to €84.3bn in 2004 – an increase of 13.6%.

Results for hotels and restaurants

Turnover in the Hotels and Restaurants sector increased by 5.5% from just over €7.5bn in 2003 to €7.9bn in 2004.

Results for transport, storage and communications

This sector showed an increase in turnover of 10.1% from €19.3bn in 2003 to €21.2bn in 2004.

Results for real estate, renting and business services sectors

This sector showed an increase in turnover of 23.5% from €21.9bn in 2003 to €27bn in 2004.

For the activity 'Buying selling or letting of own or leased property', the property activities of private households have been excluded where possible.

Retail Sales Index

Tables 14.1 and 14.2 give value indices and volume indices respectively, for 13 categories of business and combined groups for each of the years 2001 to 2006.

Technical Notes

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
- 5 - 9 persons
- 1 - 4 persons.

The business classification used for these inquiries is the Statistical Classification of Economic Activities in the European Community (NACE Rev. 1.1).

All relevant tables

Turnover (excluding VAT) and Purchases of Goods for Direct Resale (excluding VAT) indicated for NACE 50 include Vehicle Registration Tax.

Gross Value Added is Gross Margin minus Purchases of Other Goods and Services (excluding VAT).

Persons Engaged and employment details shown relate to the week ending 10 September 2004.

Table 14.3

Letters core revenue index This index reflects changes in letters core revenue and excludes revenue from elections, referenda, flotations, foreign administrations in each year as well as the impact of changes to published tariffs.

This index reflects changes to published tariffs for all weight steps and it covers all services. It is adjusted for inflation by dividing by the Consumer Price Index.

¹ FTE = Full-time Equivalent

² Weekly average

³ Overtime hours converted to basic hours in FTE

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Table 14.1 Value indices of retail sales

Base year 2000=100

Business	2001	2002	2003	2004	2005	2006
Motor trades	89.6	88.3	89.7	95.4	102.7	110.0
Non-specialised stores (excluding department stores)	109.7	116.4	122.2	128.2	137.6	151.9
Department stores	110.5	117.7	120.4	122.7	127.2	136.5
<i>of which</i>						
<i>Clothing and footwear</i>	<i>105.9</i>	<i>113.3</i>	<i>118.8</i>	<i>127.5</i>	<i>140.5</i>	<i>141.6</i>
<i>Furniture, soft furnishings etc</i>	<i>100.3</i>	<i>106.3</i>	<i>105.6</i>	<i>106.9</i>	<i>107.7</i>	<i>114.8</i>
<i>Other goods and services</i>	<i>118.7</i>	<i>126.1</i>	<i>126.4</i>	<i>121.6</i>	<i>117.4</i>	<i>136.8</i>
Food, beverages and tobacco	105.2	111.4	115.1	118.0	120.3	124.5
Pharmaceutical, medical and cosmetic articles	115.1	121.5	132.3	140.0	151.9	164.7
Textiles and clothing	110.7	112.8	116.5	121.7	129.6	139.8
Footwear and leather	110.9	112.8	115.9	117.3	122.0	128.4
Furniture and lighting	111.1	110.6	107.8	113.8	113.5	120.1
Electrical goods	117.8	123.7	122.6	121.9	118.3	128.6
Hardware, paints and glass	117.2	120.6	125.2	138.6	158.0	173.4
Books, newspapers and stationery	108.7	111.2	117.0	118.4	120.2	123.7
Other retail sales	110.8	111.7	115.3	119.8	126.2	136.4
Bars - NACE 55.4	105.3	108.7	110.8	108.3	109.7	112.6
All businesses excluding motor trades	110.1	114.8	119.2	123.5	130.5	141.1
All businesses	103.3	105.9	109.3	114.1	121.2	130.7
Combined groups						
Clothing and footwear	110.8	112.8	116.4	121.1	128.6	138.3
Household goods	116.3	119.8	121.0	128.0	135.5	147.5
Books, newspapers, stationery and other goods	110.4	111.6	115.6	119.5	125.1	134.1
Food businesses (Sum 2,4)	109.2	115.9	121.5	127.2	135.9	149.2
All non-food (Sum 3,5-12)	112.6	115.8	119.7	124.9	132.1	142.5
NACE 52 (all business excluding motor trades and bars)	110.9	115.8	120.6	126.1	134.0	145.9

Source: CSO

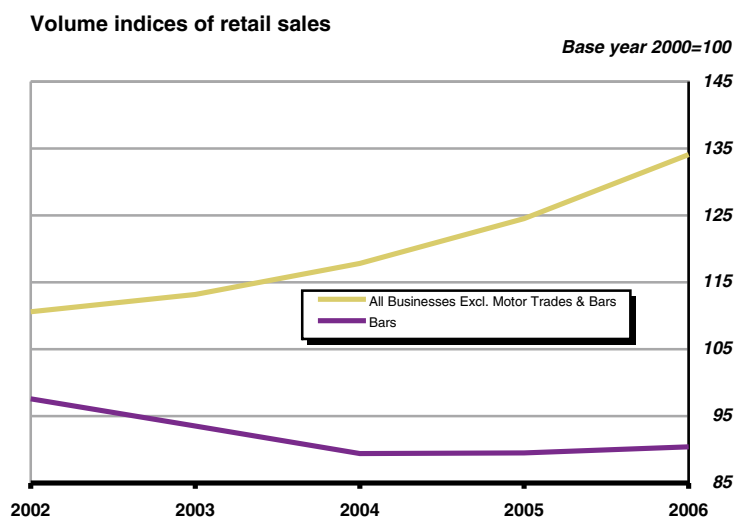
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Table 14.2 Volume indices of retail sales

Base year 2000=100

Business	2001	2002	2003	2004	2005	2006
Motor trades	89.0	85.8	85.1	88.9	93.7	98.3
Non-specialised stores (excluding department stores)	103.8	106.2	108.8	113.4	121.9	132.5
Department stores	109.9	117.5	121.3	125.6	132.2	142.9
Food, beverages & tobacco	98.8	100.0	100.1	101.3	103.0	104.7
Pharmaceutical, medical & cosmetic articles	110.3	111.4	117.2	122.3	131.0	140.8
Textiles & clothing	114.1	120.9	129.2	139.0	151.5	166.1
Footwear & leather	113.7	120.4	129.4	136.7	148.1	160.5
Furniture & lighting	107.3	104.3	100.3	105.8	105.3	111.5
Electrical goods	115.2	117.5	114.6	116.5	111.0	119.7
Hardware, paints & glass	112.7	111.2	111.1	120.4	134.5	144.2
Books, newspapers & stationery	103.3	101.6	103.3	102.6	103.3	103.6
Other retail sales	107.3	105.0	105.5	108.0	111.4	118.4
Bars	100.5	97.6	93.5	89.4	89.5	90.4
All businesses excluding motor trades	107.1	108.9	110.6	113.9	119.6	127.9
All businesses	101.5	101.7	102.6	105.7	110.8	117.7
Combined groups						
Clothing and footwear	114.0	120.8	129.2	138.6	151.0	165.4
Household goods	112.5	112.0	110.1	115.3	120.9	129.5
Books, newspapers, stationery & other goods	106.2	103.8	104.4	106.3	109.4	115.0
Food businesses (Sum 2,4)	103.1	105.2	107.3	111.4	119.0	128.5
All non-food (Sum 3,5-12)	111.1	111.5	112.8	116.2	121.1	128.8
NACE 52 (All business excluding motor trades & bars)	108.1	110.6	113.2	117.8	124.5	134.1

Source: CSO



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Table 14.3 An Post – operational statistics

	2002	2003	2004	2005	2006
Mail					
Letters core revenue index (2001=100)	104.6	107.8	109.2	113.6	118.4
System size					
Number of delivery points (millions)	1,598	1,685	1,765	1,875	1,998
Post office network	96	92	90	88	84
Company post offices	1,584	1,417	1,365	1,321	1,277
Sub-post offices	86	149	159	161	171
Postal agencies	1,766	1,658	1,614	1,570	1,532
Other company premises	58	62	62	63	65
Number of motor vehicles	2,917	3,011	2,908	2,905	2,991
Personnel (staff numbers at 31 December)					
Headquarters	675	588	567	562	551
Savings/remittance services	340	327	299	295	286
Inspection	49	47	45	37	38
Postmen/postwomen	4,722	4,680	4,520	4,326	4,207
Postal sorters	1,215	1,281	1,313	1,197	1,369
Post office clerks	1,145	1,126	1,094	1,042	1,024
Other grades	803	817	790	708	665
Temporary	864	1,010	1,019	1,298	1,311
Total An Post staff	9,813	9,876	9,647	9,465	9,451
Total An Post staff (FTE) ¹	9,416	9,411	9,164	8,966	8,868
Casual staff (FTE) ²	349	386	358	377	423
Overtime hours (FTE) ³	2,813	2,121	1,918	1,953	2,006
Grand Total	12,578	11,918	11,440	11,296	11,297
Subsidiary companies	577	622	577	492	487
Postmasters: engaged as agents	1,584	1,417	1,365	1,321	1,277
	€m	€m	€m	€m	€m
Value of savings services funds at 31 December (Note 1)	4,794	5,004	5,311	5,668	5,863
Counters: Business value					
Remittance Services	121	132	137	n/a	n/a
Postal money orders issued	619	564	496	422	418
Post office savings services					
Savings bank deposits	746	792	812	811	850
Savings bank withdrawals	590	621	645	638	807
Savings certificates issued	217	347	417	400	469
Savings certificates repaid	611	757	811	725	1,052
Instalment savings issued	63	67	72	78	97
Instalment savings repaid	147	134	131	104	114
Savings bonds issued	263	469	505	475	673
Savings bonds repaid	332	360	329	362	626

Table 14.3 An Post – operational statistics (continued)

	2002	2003	2004	2005	2006
Pensions, allowances and social welfare benefits					
Child benefits paid	1,016	1,101	1,101	1,116	1,119
Unemployment benefits paid	990	1,042	1,069	1,075	1,587
Old age pensions paid	1,083	1,140	1,195	1,225	1,577
Widows/orphans pensions paid	726	766	815	865	900
Other allowances	2,060	2,167	2,228	2,341	1,900
Other miscellaneous	1,679	2,316	2,969	3,325	3,658
	'000s	'000s	'000s	'000s	'000s
Billpay volumes	17,533	21,238	23,329	24,777	25,510
TV licence sales	1,167	1,176	1,241	1,273	1,339

Source: An Post

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Table 14.4 Principal aggregates for the State, 2004

	NACE2	No. of Enterprises	Turnover excluding VAT €'000	Gross Value Added €'000	Persons engaged
Sale, maintenance and repair of motor vehicles and motor cycles; retail sale of automotive fuel	50	5,750	15,191,483	1,229,222	37,936
Wholesale trade and commission trade except of motor vehicles and motorcycles	51	7,220	46,114,065	7,821,281	79,261
Retail trade, except of motor vehicles and motor cycles; repair of personal and household goods	52	17,845	23,012,560	5,201,368	162,415
Hotels and restaurants	55	11,288	7,941,858	2,838,329	133,374
Land transport; transport via pipelines	60	4,151	2,831,974	1,108,014	30,108
Water and air transport; Supporting and auxiliary transport activities; activities of travel agencies	61, 62, 63	1,298	8,995,559	3,467,926	31,680
Post and telecommunications	64	1,476	9,419,422	5,245,945	30,110
Real estate activities	70	5,448	4,821,493	3,150,591	18,021
Renting of machinery and equipment without operator and of personal and household goods.	71	1,877	1,227,531	634,963	9,927
Computer and related activities	72	4,312	6,662,851	2,679,910	28,426
Research and development	73	257	266,220	150,987	2,066
Other business activities	74	17,765	14,010,829	6,837,814	127,394
Recreational, cultural and sporting activities	92	1,674	1,798,005	1,012,855	22,046
Other service activities	93	4,923	940,094	478,456	24,204
Total	All	85,284	143,233,944	41,857,663	736,969

Source: CSO

Table 14.5 Family business principal aggregates for the State, 2004

Family/ Non-family business	NACE Section	No. of Enterprises	Turnover excluding VAT €'000	Gross Value Added €'000	Persons engaged
Family business	G	17,553	29,323,169	4,567,821	141,790
Non-family Business		13,262	54,994,938	9,684,051	137,821
Total Section G		30,815	84,318,107	14,251,872	279,611
Family business	H	7,279	4,307,139	1,420,912	74,068
Non-family business		4,009	3,634,719	1,417,416	59,306
Total Section H		11,288	7,941,858	2,838,328	133,374
Family business	I	2,719	2,295,327	681,317	15,894
Non-family business		4,206	18,951,628	9,140,569	76,004
Total Section I		6,925	21,246,955	9,821,886	91,898
Family business	K	10,016	4,188,588	3,013,741	41,514
Non-family business		19,643	22,800,336	10,440,524	144,321
Total Section K		29,659	26,988,924	13,454,265	185,835
Family business	O	2,548	661,955	354,914	15,831
Non-family business		4,048	2,076,144	1,136,398	30,419
Total Section O		6,596	2,738,099	1,491,312	46,250
ALL		85,284	143,233,943	41,857,663	736,969

Source: CSO

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Table 14.6 Use of ICT by enterprises classified by NACE Rev. 1.1 in the State, 2004

Principal activity	NACE REV.1.1	Total no. of enterprises	No. of enterprises with e-mail	No. of enterprises with website	No. of enterprises with orders via e-mail, EDI or the internet	Total turnover excl. VAT €'000	Turnover resulting from orders submitted using e-mail, EDI or the internet €'000
Sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel	50	5,750	1,568	814	472	15,191,483	1,484,161
Wholesale trade and commission trade, except of motor vehicles and motorcycles	51	7,220	4,364	1,912	1,541	46,114,065	5,914,830
Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods	52	17,845	3,843	1,515	1,134	23,012,560	352,710
Hotels and restaurants	55	11,288	1,854	1,300	608	7,941,858	245,909
Land transport; transport via pipelines Water and Air transport, Supporting and auxiliary transport activities; activities of travel agencies; Post and telecommunications	60, 61, 62, 63, 64	6,925	1,758	825	666	21,246,955	3,140,334
Real estate activities Renting of machinery and equipment without operator and of personal and household goods	70, 71	7,325	2,086	1,197	510	6,049,024	142,176
Computer and related activities	72	4,312	3,422	2,094	1,256	6,662,851	1,562,224
Research and development; Other business activities	73 - 74	18,022	12,218	4,457	2,648	14,277,049	590,901
Recreational, cultural and sporting activities Other service activities	92 - 93	6,596	1,224	812	367	2,738,099	92,319
Total		85,284	32,337	14,925	9,201	143,233,944	13,525,565

Source: CSO

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Table 14.7 Exports and imports of goods and services for services sectors with 20+ employees classified by NACE Rev. 1.1 in the State, 2004

Principal activity	NACE REV.1.1	Total no. of enterprises	Turnover excl. VAT €'000	Gross value added €'000	Total exports of goods and services excl. VAT €'000	Total exports of services excl. VAT €'000	Total imports of goods and services excl. VAT €'000	Total imports of services excl. VAT €'000
Sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel	50	383	8,475,124	667,941	132,662	1,904	1,196,581	6,163
Wholesale trade and commission trade, except of motor vehicles and motorcycles	51	710	32,709,391	4,534,275	4,459,700	138,169	7,498,371	277,528
Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods	52	877	14,169,192	3,470,019	203,109	2,688	1,872,169	42,949
Hotels and restaurants	55	1,139	3,881,728	1,663,722	2,624	134	18,977	3,123
Land transport; transport via pipelines Water and Air transport, Supporting and auxiliary transport activities; activities of travel agencies; Post and telecommunications	60, 61, 62, 63, 64	389	17,016,869	7,924,969	3,949,152	3,699,337	1,495,482	1,228,834
Real estate activities Renting of machinery and equipment without operator and of personal and household goods	70, 71	117	1,259,796	546,713	13,761	1,796	66,342	941
Computer and related activities	72	188	3,599,444	948,609	2,209,953	1,511,205	1,044,442	414,567
Research and development; Other business activities	73 - 74	768	8,372,398	3,961,025	1,781,788	660,705	1,412,094	318,722
Recreational, cultural and sporting activities Other service activities	92 - 93	323	1,687,075	979,091	504,202	502,056	64,368	32,549
Total		4,894	91,171,017	24,696,364	13,256,950	6,517,994	14,668,825	2,325,377

Source: CSO

