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Services and Distribution

- Retail sales decreased by 1.1% in volume and 0.7% in value in 2012.
- The volume of retail sales of automotive fuel decreased by 7.6% in 2012.
- The value of the Non-Financial Traded Services Sector increased by 2.5% in 2012.
- 31% of all turnover in the distribution and services sectors was generated by wholesale trade (excluding motor vehicles and motorcycles) and amounted to €60bn in 2010.
- Retail trade (excluding motor vehicles and motorcycles) accounted for 18% of enterprises, and 24% of persons engaged, in the distribution and services sectors in 2010.
- 12% of large Irish enterprises source internationally.

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Introduction

This chapter contains information on the services sector and international sourcing. Data is taken from the Annual Services Inquiry (ASI), the Monthly Services Index, the Retail Services Index and the International Sourcing survey.

Annual Services Inquiry

The ASI provides information on the structure of the services sectors with principal and supplementary aggregates given in the tables.

International Sourcing Survey

International sourcing involves the movement of one or more business functions abroad to an enterprise within or outside the enterprise group. It provides information on the level and pattern of international sourcing in the Irish business economy.

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.

Monthly Services Index

The Monthly Services Index (MSI) monitors trends in output at current prices of the enterprises in the Non-Financial Traded Services sector. This is the first step in the development of a Services Production Index that measures gross value added changes at constant prices, ie a volume index.

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 2008 to 2012 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 (excluding VAT) plus subsidies minus indirect taxes.

Persons Engaged and employment details shown relate to the week ending 10 September 2010.

International Sourcing Survey

The International Sourcing Survey 2012 was a census of all enterprises in Ireland with 100 or more employees in the Irish business economy (NACE Rev. 2 sectors B to N excluding K).

Table 13.1 Value indices of retail sales

Base year 2005=100

Business	2008	2009	2010	2011	2012
Motor trades	96.6	53.1	61.3	63.0	59.2
Retail sale in non-specialised stores with food, beverages or tobacco predominating	125.6	117.7	117.4	116.0	119.0
Department stores	106.3	90.2	90.2	86.4	87.3
Retail sale of food, beverages and tobacco in specialised stores	106.7	98.0	92.4	87.3	87.0
Retail sale of automotive fuel	119.3	100.0	105.9	107.5	111.5
Retail sale of pharmaceutical, medical and cosmetic articles	121.0	116.5	110.9	102.4	102.7
Retail sale of textiles, clothing and footwear	109.4	91.7	88.7	85.4	82.4
Retail sale of furniture and lighting	93.9	66.2	61.8	54.6	51.2
Retail sale of hardware, paints and glass	108.8	88.4	83.1	77.2	72.7
Retail sale of electrical goods	102.6	82.0	79.5	75.6	78.9
Retail sale of books, newspapers and stationery	102.1	87.0	80.3	72.4	67.9
Other retail sales	112.2	91.5	87.5	80.4	76.5
Bars	101.8	92.9	82.3	76.4	73.4
All retail businesses, excluding motor trades	114.9	102.1	99.5	96.0	96.4
All retail businesses	110.8	90.9	90.8	88.5	87.9
Combined groups					
All retail businesses, excluding motor trades and bars	116.6	103.3	100.0	98.6	99.4
Motor trades and automotive fuel	101.4	63.1	68.9	72.4	70.3
All retail businesses, excluding motor trades, automotive fuel and bars	116.4	103.6	99.6	97.8	98.2
Retail sale of food	124.0	116.0	113.1	113.5	116.2
Retail sale of non food products, excluding motor trades, automotive fuel and bars	109.0	91.7	86.6	82.6	80.9
Retail sale of household equipment	103.3	81.4	76.1	72.2	71.2
Retail sale of books, newspapers, stationery and other goods	110.4	90.7	84.6	79.0	74.9

Source: CSO

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Table 13.2 Volume indices of retail sales

Base year 2005=100

Business	2008	2009	2010	2011	2012
Motor trades	93.4	53.5	64.4	68.4	64.7
Retail sale in non-specialised stores with food, beverages or tobacco predominating	113.6	107.2	116.0	103.5	116.2
Department stores	113.6	107.2	116.0	111.7	112.9
Retail sale of food, beverages and tobacco in specialised stores	98.1	92.5	91.4	86.0	85.1
Retail sale of automotive fuel	107.0	102.3	93.6	85.2	78.7
Retail sale of pharmaceutical, medical and cosmetic articles	119.9	118.8	118.0	111.1	112.7
Retail sale of textiles, clothing and footwear	120.7	114.1	118.2	117.0	113.5
Retail sale of furniture and lighting	103.9	79.0	77.4	72.7	71.0
Retail sale of hardware, paints and glass	106.4	89.2	84.7	80.5	75.5
Retail sale of electrical goods	134.2	121.1	126.2	131.0	145.0
Retail sale of books, newspapers and stationery	93.5	79.8	72.5	65.9	61.5
Other retail sales	118.6	108.8	102.8	94.3	90.3
Bars	92.1	82.9	74.3	70.2	66.6
All retail businesses, excluding motor trades	111.5	104.1	103.0	100.3	100.1
All retail businesses	107.4	92.7	93.9	93.1	92.1
Combined groups					
All retail businesses, excluding motor trades and bars	114.1	106.9	106.8	104.2	104.5
Motor trades and automotive fuel	95.3	62.0	67.4	70.6	67.0
All retail businesses, excluding motor trades, automotive fuel and bars	115.2	108.2	108.9	106.7	107.3
Retail sale of food	115.9	111.5	112.7	112.0	113.5
Retail sale of non food products, excluding motor trades, automotive fuel and bars	114.5	105.0	105.3	101.7	101.5
Retail sale of household equipment	117.7	100.7	100.8	100.3	104.0
Retail sale of books, newspapers, stationery and other goods	114.1	103.5	97.3	89.2	85.1

Source: CSO

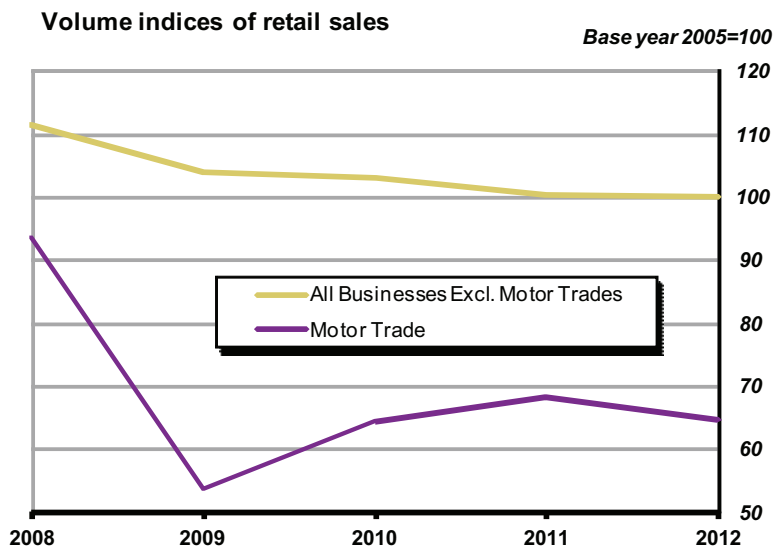


Table 13.3 Principal aggregates Annual Services Inquiry, 2010

	NACE Rev. 2	No. of enterprises	Turnover excluding VAT €m	Gross value added €m	Persons engaged
Motor trades	45	6,274	8,495	1,006	28,918
Wholesale trade	46	10,193	59,820	8,097	89,390
Retail trade	47	21,849	33,264	6,360	211,328
Land transport	49	6,434	3,438	1,478	37,105
Water transport	50	85	486	132	901
Air transport	51	43	5,188	1,302	8,192
Warehousing and support activities for transportation	52	1,036	2,703	1,071	14,720
Postal and courier activities	53	2,137	1,623	865	17,233
Accommodation	55	2,136	2,283	985	45,859
Food and beverage service activities	56	13,194	5,485	2,003	98,816
Picture, video and television programmes, sound recording and music publishing activities	59	1,078	461	175	4,468
Programming and broadcasting activities	60	99	381	254	4,126
Telecommunications	61	379	5,327	2,111	13,332
Publishing, computer programming and consultancy and information service activities	58,62,63	5,947	36,461	8,454	43,992
Real estate activities	68	8,428	1,542	807	21,597
Legal and accounting activities	69	9,095	4,118	2,922	42,277
Activities of head offices; management consultancy activities	70	4,752	2,012	959	15,022
Architectural and engineering activities; technical testing and analysis	71	6,052	2,621	1,012	21,534
Scientific research and development	72	297	758	323	4,225
Advertising and market research	73	818	1,154	403	7,843
Other professional, scientific and technical activities	74	4,130	741	335	8,650
Veterinary activities	75	987	277	120	3,146
Renting and leasing activities	77	2,488	2,995	1,080	10,628
Employment activities	78	834	1,193	705	22,213
Travel agency, tour operator and other reservation service and related activities	79	463	1,341	221	4,495
Security and investigation activities	80	748	644	453	12,497
Services to buildings and landscape activities	81	3,135	897	564	30,318
Office administrative, office support and other business support activities	82	1,602	1,244	668	15,059
Other service activities	92,93,95,96	10,046	3,476	1,671	53,306
Total	All	124,759	190,430	46,532	891,190

Source: CSO

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Table 13.4 Exports and imports of goods and services for services sectors with 20 or more employees by NACE Rev. 2 in the State, 2010

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	2,377	75,481	11,013	12,871	18,702
<i>Motor trades (45)</i>	45	253	4,777	460	36	1,419
<i>Wholesale trade (46)</i>	46	849	48,607	6,209	12,657	13,756
<i>Retail trade (47)</i>	47	1,276	22,098	4,343	177	3,527
Transportation and storage (H)	H	376	10,795	3,934	1,167	454
Accommodation and food service activities (I)	I	1,418	4,473	1,905	1	33
Information and communication (J)	J	420	40,030	9,991	30,750	21,451
Real estate activities (L)	L	91	417	230	3	0
Professional, scientific and technical activities (M)	M	605	6,306	3,174	1,896	507
Administrative and support service activities (N)	N	557	5,528	2,781	615	204
Other service activities (92,93,95,96)	92,93,95,96	352	1,654	977	42	35
Total		6,196	144,683	34,005	47,344	41,387

Source: CSO

Table 13.5 Value index of non-financial traded services

Base year 2010=100

Business	2010	2011	2012
Wholesale trade (46)	100.0	114.2	118.8
Wholesale and retail trade; repair of motor vehicle and motorcycles (45-47)	100.0	107.2	109.6
Transportation and storage (49-53)	100.0	103.8	109.4
Accommodation and food service activities (55, 56)	100.0	101.4	103.7
Information and communication (58-63)	100.0	103.6	112.3
Accommodation (55)	100.0	105.4	107.7
Professional, scientific and technical activities (69-75)	100.0	101.1	90.6
Administrative and support service activities (77-83)	100.0	92.8	99.8
Services (68, 92-96)	100.0	100.7	97.2
Food service activities (561, 562)	100.0	102.9	109.9
All services	100.0	103.3	105.9

Source: CSO

Table 13.6 International sourcing by business function and broad sector, 2009-2011

	Industry	Non-financial services	Total
All enterprises	361	898	1,259
Number of enterprises engaged in international sourcing			
One or more business functions (core & support)¹	57	92	148
Core business function	23	51	73
One or more support functions	47	78	125
Distribution and logistics	13	19	32
Marketing, sales and after sales services	19	26	44
ICT services	15	32	47
Administrative and management functions	17	39	56
Research & Development, engineering and related technical services	12	18	30
Other support functions	13	30	43
Percentage of enterprises engaged in international sourcing			
One or more business functions (core & support)¹	15.8	10.2	11.8
Core business function	6.4	5.7	5.8
One or more support functions	13.0	8.7	9.9
Distribution and logistics	3.6	2.1	2.5
Marketing, sales and after sales services	5.3	2.9	3.5
ICT services	4.2	3.6	3.7
Administrative and management functions	4.7	4.3	4.4
R&D, engineering and related technical services	3.3	2.0	2.4
Other support functions	3.6	3.3	3.4

¹Enterprise can source more than one business function. Hence the sum of the individual business functions do not equal the totals.

Source: CSO

