

Statistical bulletin

Non-financial business economy, UK (Annual Business Survey): 2011 provisional results

Size and growth within the UK's non-financial business sectors: non-financial services, distribution, production, construction and agriculture.



Release date: 15 November 2012 Next release: 13 June 2013

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1. Key points

- The UK Business Economy, as measured by the Annual Business Survey (ABS), recorded a rise in approximate Gross Value Added at basic prices (aGVA) of £35.7 billion (3.8 per cent) between 2010 and 2011
- This increase in aGVA is a continuation in the recovery seen between 2009 and 2010 and takes aGVA to a
 level 1.1 per cent (£10.2 billion) above that seen in 2008, at the start of the recession
- The recovery was seen across many sectors, although for many, aGVA growth was suppressed due to growth in purchases of goods, materials and services being higher than that for turnover
- The Service sector led this recovery with aGVA rising £21.6 billion (4.3 per cent) between 2010 and 2011, the second consecutive annual increase in aGVA. Within the Service sector, strong increases were seen in Professional, scientific and technical activities (Section M), Administrative and support activities (Section N) and Information and communication (Section J)

2. Annual Business Survey (ABS)

Overview

This release contains 2011 provisional results from the Annual Business Survey (ABS), formerly the Annual Business Inquiry part 2 (ABI/2). The ABS is the key resource for understanding the detailed structure, conduct and performance of businesses across the UK. It is an annual survey of businesses covering the production, construction, distribution and service industries which represent the UK Business Economy. This is about two thirds of the UK's whole economy in terms of Gross Value Added. For more information about the survey and its coverage see the background notes.

Estimates published include turnover, purchases, approximate Gross Value Added at basic prices (aGVA) and employment costs for industry sectors and the UK Business Economy. These estimates are collected and presented as monetary values, giving a snapshot of UK business activity: they can be used to understand the level of the contributions of different business sectors to the UK economy at any one time. The statistics produced are referred to as structural business statistics.

The business economy is constantly evolving as businesses merge, are taken over, or simply change the main focus of their activity. These changes can result in the industry classification of a business changing over time. For example, if a business undertakes both manufacturing and wholesale activities, but most of its employment is within manufacturing, it will be classified to manufacturing.

If the employment were to change substantially so that the majority then worked in wholesale, the industry classification would change and the whole of the business' turnover, for example, would move from manufacturing to wholesale. In industries where movements are common, or where large businesses are involved, these changes can themselves sometimes cause large changes in ABS estimates. This should be taken into consideration when changes over time are being assessed.

The ABS has a wide range of uses. For example, ABS statistics are essential feeders to the overall quality of the <u>UK National Accounts (174.2 Kb Pdf)</u> and the measurement of <u>Gross Domestic Product</u> (GDP), they are supplied to Eurostat to meet the requirements of the European Structural Business Statistics (SBS) Regulation, and are used by devolved administrations and central and local government to monitor and inform policy development. For other uses see background note 11.

The approximate estimate of Gross Value Added at basic prices (aGVA) published in this release is a measure of the income generated by businesses within their industries and sectors, less the cost of goods and services used to create the income. The main component of income is turnover, while purchases is the main component of the consumed goods and services (referred to as intermediate consumption).

Stock levels which may rise or fall can also have an impact on aGVA, as can the values of subsidies received or duty paid. Businesses' employment costs are met from the value of aGVA, leaving an operating surplus which is a close approximation for profit. This ABS measure of aGVA is called 'approximate' because it does not fully allow for some National Accounts concepts such as taxes, subsidies or income earned in kind. National Accounts make these adjustments to calculate GVA and include information from other sources which cover parts of the economy not included in ABS.

The recession and recovery described by the ABS between 2008 and 2011 is broadly in line with Gross Domestic Product (GDP) figures published in the National Accounts. Both the ABS aGVA estimates and the National Accounts GDP estimates show a fall between 2008 and 2009 and increases between 2009 and 2010 and between 2010 and 2011, although the recovery in the ABS results is estimated to be stronger. For further information on aGVA see background note 3.

For more information, including more detail on the industry coverage, the users and uses of ABS and the measure of aGVA, please see the background notes in this release.

What data are available?

Provisional 2011 UK National results at the industry class level (4 digit Standard Industrial Classification 2007) are available free of charge via the 'Data in this release' button at the top of this publication, or from the ABS webpages on the ONS website. The published variables include turnover, purchases, employment costs, capital expenditure and stocks.

Additional standard extracts containing more detail are available on request. Bespoke analyses are also available but there will be a charge for these. For more information about these services please email abs@ons.gov.uk, or telephone +44(0) 1633 456592 for standard extracts, or +44 (0)1633 456606 for bespoke special analyses.

User feedback

We are aiming to improve this release and its associated commentary. We would welcome any feedback you might have, and would be particularly interested in how you make use of these data to inform your work. Please contact us via email: abs@ons.gov.uk or telephone Heather Bovill on +44 (0)1633 455107.

3. UK business economy

This release provides an estimate of the size and growth of the UK Business Economy, as measured by the Annual Business Survey (ABS), from 2008 to 2011 (see Figure 1 and Table 1). It provides a breakdown by broad industry showing the impact of each on the size and growth of the UK Business Economy from 2008 to 2011 (see Table 1 and Figure 2). The release then looks in more detail at specific industries to understand the drivers behind sectoral changes over this period. Where the recession is mentioned in this release it refers to the 'first dip' which started in 2008 rather than the subsequent recession which began at the end of 2011.

Commentary in this release is based on industries' contributions to the changes between 2010 and 2011. Where possible, the commentary draws on evidence from businesses or other sources of information to help explain possible reasons behind the observed changes.

Approximate Gross Value Added at basic prices (aGVA), that is the income generated by businesses, less the cost of goods and services used to create this income, for the UK Business Economy was estimated to be £974.1 billion in 2011, 3.8 per cent (£35.7 billion) above the level seen in 2010 (see Figure 1 and Table 1). This is the second consecutive annual increase in aGVA, taking it above the level seen in 2008, at the start of the recession.

The increase in aGVA between 2010 and 2011 was a result of increases in turnover and purchases. Turnover increased by 6.3 per cent (£197.2 billion) between 2010 and 2011 but purchases of goods, materials and services increased at a higher rate of 8.0 per cent (£172.8 billion), resulting in aGVA growth that was lower than growth for turnover.

Note: Please note that aGVA is not adjusted for inflation. To see which industries are included in the ABS measure of the UK Business Economy, refer to background note 3.

Figure 1: Details of income and expenditure - UK business economy (Sections A-S) 2008-2011

Provisional 2011 United Kingdom data

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Provisional 2011 United Kingdom data

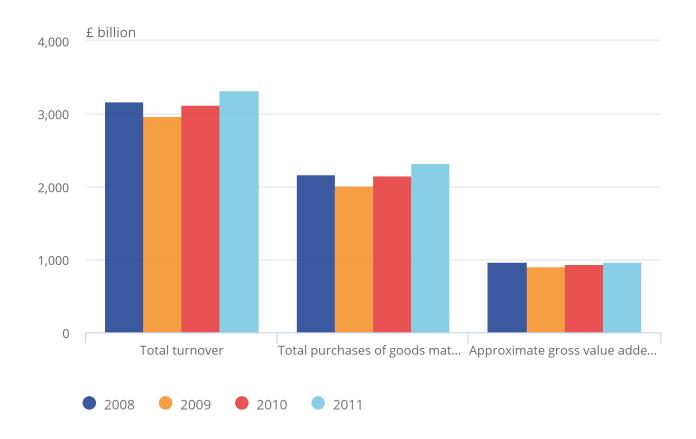


Table 1: Details of Income and Expenditure - UK Business Economy (Sections A-S) 2008-2011

£ billion

Standard Industrial Classification Revised 2007 Section	Year t	Total urnover	Total purchases of goods materials and services	Approximate gross value added at basic prices (aGVA)
A-S - UK Business Economy	2008	3,168	2,169	964
	2009	2,969	2,016	905
	2010	3,125	2,148	938
	2011	3,322	2,320	974
A (Part) - Agriculture, forestry and	2008	5	3	2
fishing	2009	4	3	2
	2010	5	3	2
	2011	5	4	2
B-E - Production industries	2008	677	438	223
	2009	611	394	196
	2010	657	427	210
	2011	702	466	222
F - Construction industries	2008	223	138	85
	2009	186	114	69
	2010	183	111	69
	2011	188	118	70
G - Distribution industries	2008	1,225	1,046	158
	2009	1,143	969	149
	2010	1,220	1,048	154
	2011	1,318	1,147	156
H-S - Service industries	2008	1,038	544	497
	2009	1,025	537	489
	2010	1,061	558	504
	2011	1,109	585	525

Source: Office for National Statistics

Increases in aGVA were seen across all of the broad industry groups (Figure 2 and Figure 3) but services, the largest broad industry group, contributed most to overall growth. The services sector contributed £21.6 billion to aGVA growth in the UK Business Economy between 2010 and 2011, an increase in aGVA for the sector of 4.3 per cent taking it above the level seen in 2008.

Production also saw an increase in aGVA between 2010 and 2011, contributing £11.8 billion to aGVA growth in the UK Business Economy. This was an increase of 5.6 per cent for the sector, but below the 7.4 per cent growth seen between 2009 and 2010. Despite being the second consecutive annual increase, production aGVA remains slightly below the level seen in 2008.

Agriculture (Part), forestry and fishing, Construction and Distribution saw lower growth in aGVA between 2010 and 2011. Together these industries contributed £2.4 billion to aGVA growth recording an aGVA rise of 1.1 per cent

Figure 2: UK business economy (Sections A-S) - Details of approximate Gross Value Added (aGVA) by SIC Section 2008-2011

Provisional 2011 United Kingdom data

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Provisional 2011 United Kingdom data

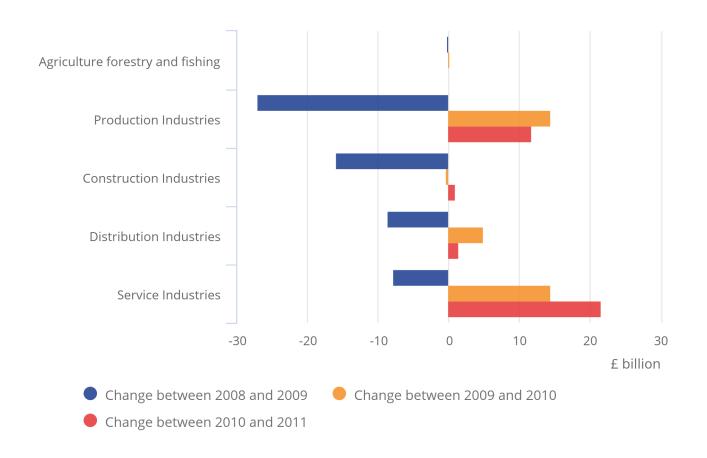


Source: Office for National Statistics

Figure 3: UK business economy (Sections A-S) - Change in approximate Gross Value Added (aGVA) by SIC Section 2008-2011

Figure 3: UK business economy (Sections A-S) - Change in approximate Gross Value Added (aGVA) by SIC Section 2008-2011

Provisional 2011 United Kingdom data



Source: Annual Business Survey (ABS) - Office for National Statistics

4. Agriculture, forestry and fishing (Section A)

Within Section A, the Annual Business Survey (ABS) covers only hunting, forestry, fishing and the support activities to agriculture. Detailed commentary has not been included because its size in terms of economic output, as measured by the ABS, is small in comparison to the other sections of the UK Business Economy. However, data for these parts of Section A can be found in Table 1 and in the reference tables linked to this bulletin.

The other parts of Agriculture, which include crop and animal production, are covered by the Department for Environment, Food and Rural Affairs (DEFRA).

5. Production industries (Sections B-E)

Approximate Gross Value Added at basic prices (aGVA) in the Production sector was estimated to be £221.8 billion in 2011, 5.6 per cent (£11.8 billion) higher than the level seen in 2010 (Figure 4 and Table 2). Turnover increased by 6.9 per cent (£45.2 billion) and purchases increased by 9.2 per cent (£39.3 billion), suggesting that businesses in the Production sector may not be passing on all of their increasing input costs to customers. Another possible explanation for the relatively high increase in purchases may be businesses building up stocks after reducing them during the recession which started in 2008.

The increase in aGVA seen between 2010 and 2011 is a continuation of the recovery seen between 2009 and 2010, although the rate of recovery in the latest year (5.6 per cent) was lower than the 7.4 per cent increase seen between 2009 and 2010. The size of the Production sector in 2011, in terms of aGVA, now stands £0.7 billion (0.3 per cent) below the level seen in 2008, at the start the recession.

Figure 4: Details of income and expenditure - Production industries (Sections B-E) 2008-2011

Provisional 2011 United Kingdom data

Figure 4: Details of income and expenditure - Production industries (Sections B-E) 2008-2011

Provisional 2011 United Kingdom data

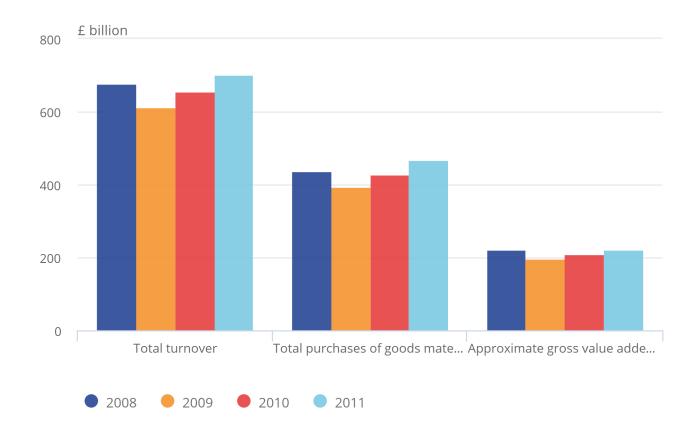


Table 2: Details of Income and Expenditure - Production Industries (Sections B-E) 2008-2011

£ billion

Standard Industrial Classification Revised 2007 Section		Total 1 urnover	Total purchases of goods materials and services a	Approximate gross value added at basic prices (aGVA)
B-E - Production industries	2008	677	438	223
	2009	611	394	196
	2010	657	427	210
	2011	702	466	222
B - Mining and quarrying	2008	61	27	34
	2009	46	22	24
	2010	50	23	27
	2011	58	31	28
C - Manufacturing	2008	500	333	149
	2009	450	294	131
	2010	484	318	147
	2011	512	343	154
D - Electricity, gas, steam and air	2008	87	64	24
conditioning supply	2009	88	64	26
	2010	94	72	22
	2011	101	78	24
E - Water supply, sewerage, waste	2008	29	14	15
management, and remediation activities	2009	28	14	15
	2010	29	14	15
	2011	31	15	16

Source: Office for National Statistics

All the sections within Production saw increases in aGVA between 2010 and 2011, but the continued recovery in Production was mainly driven by Manufacturing (Section C), which saw an increase in aGVA of £7.0 billion (4.8 per cent) over the period (Figures 5 and 6). Both purchases and turnover increased for this sector, although the rise in purchases was larger than that for turnover (7.8 per cent and 5.8 per cent respectively), suppressing growth in aGVA. Rising costs of raw materials and the price of oil are reported to have particularly impacted businesses in this sector. Despite this, manufacturing aGVA in 2011 was 2.8 per cent (£4.1 billion) above the level in 2008, at the start of the recession.

The picture within the Manufacturing sector was mixed: while the majority of divisions saw increases in aGVA between 2010 and 2011, seven of the 23 divisions experienced falls.

The increase in Manufacturing aGVA was driven by the following divisions: Manufacture of fabricated metal products (Division 25), Manufacture of machinery and equipment (Division 28), Manufacture of other transport equipment (Division 30), Manufacture of beverages (Division 11) and Manufacture of motor vehicles, trailers and semi-trailers (Division 29). Together these five divisions accounted for an increase of £5.7 billion, over four fifths of the total aGVA increase seen for Manufacturing.

There may be a range of reasons for growth across these divisions. For example, the Society of Motor Manufacturers and Traders suggest that growth in Motor vehicle manufacture (Division 29) in 2011 was driven by exports.

Figure 5: Production Industries (Sections B-E) - Details of Approximate Gross Value Added (aGVA) by SIC Section 2008-2011

Provisional 2011 United Kingdom data

Figure 5: Production Industries (Sections B-E) - Details of Approximate Gross Value Added (aGVA) by SIC Section 2008-2011

Provisional 2011 United Kingdom data

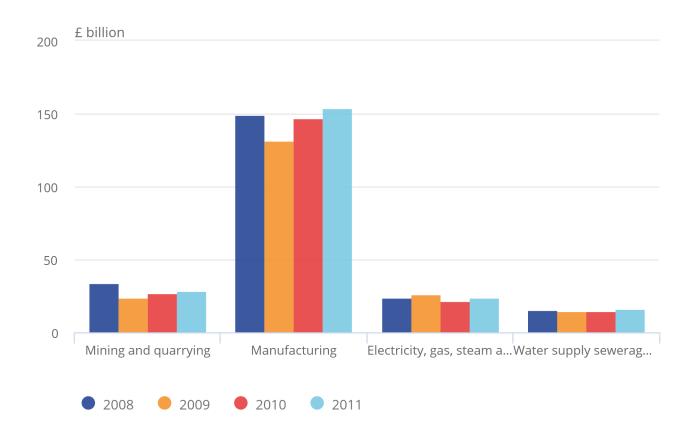
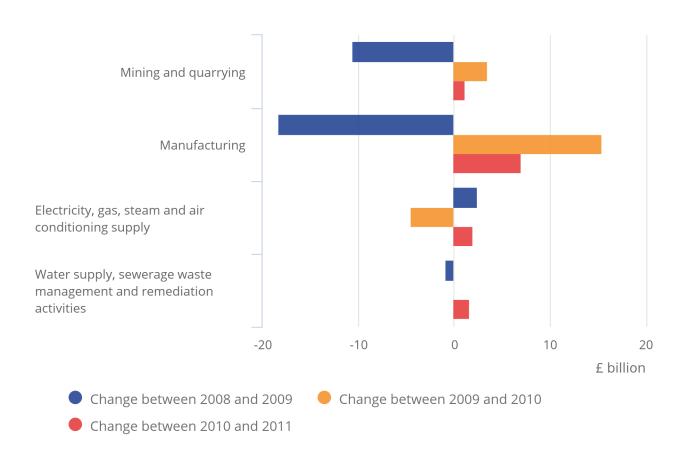


Figure 6: Production Industries (Sections B-E) - Change in Approximate Gross Value Added (aGVA) by SIC Section 2008-2011

Figure 6: Production Industries (Sections B-E) - Change in Approximate Gross Value Added (aGVA) by SIC Section 2008-2011

Provisional 2011 United Kingdom data



Source: Annual Business Survey (ABS) - Office for National Statistics

While not major drivers of the change in Production aGVA between 2010 and 2011, Mining and quarrying (Section B), Electricity, gas, steam and air conditioning supply (Section D), and Water supply, sewerage, waste management and remediation activities (Section E) also showed a recovery in aGVA.

Mining and quarrying (Section B, which includes oil and gas extraction) saw an increase of 4.6 per cent (£1.2 billion) in aGVA partly due to the continuing increase in the price of gas and oil. These price increases were impacted by a number of external influences such as the Arab Spring uprisings and the Fukushima nuclear disaster. Despite the growth in the Mining and quarrying industry, aGVA in this sector remains 16.8 per cent (£5.7 billion) below the level seen in 2008.

Electricity, gas, steam and air conditioning supply (Section D) saw increases of 7.2 per cent in turnover and 8.4 per cent in purchases (£6.8 billion and £6.0 billion respectively). Despite an increase in aGVA of 9.2 per cent (£2.0 billion) it still remains below the recent peak of £26.1 billion seen in 2009. Increases were primarily driven by the production and sale of electricity.

Water supply, sewerage, waste management, and remediation activities (Section E) saw an increase of 10.8 per cent (£1.6 billion) in aGVA, driven by the Treatment and disposal of non-hazardous waste and the Recovery of sorted materials such as recycling.

6. Construction industries (Section F)

Approximate Gross Value Added at basic prices (aGVA) in the Construction sector stood at £69.5 billion in 2011 (Figure 7 and Table 3), 1.4 per cent (£1.0 billion) higher than the level seen in 2010, but still 18.0 per cent (£15.3 billion) below the level seen in 2008. As in Production, the annual increase in aGVA was constrained as purchases costs increased at a much higher rate than turnover (increasing 6.3 per cent (£7.0 billion) and 2.7 per cent (£4.9 billion) respectively).

The most marked change, however, was seen in stocks, which fell over the previous three years (including a large fall in 2009 as the economic crisis took hold) but saw growth of £0.5 billion (1.5 per cent) between the start and end of 2011.

Figure 7: Details of Income and Expenditure - Construction Industries (Section F) 2008-2011

Figure 7: Details of Income and Expenditure - Construction Industries (Section F) 2008-2011

Provisional 2011 United Kingdom data

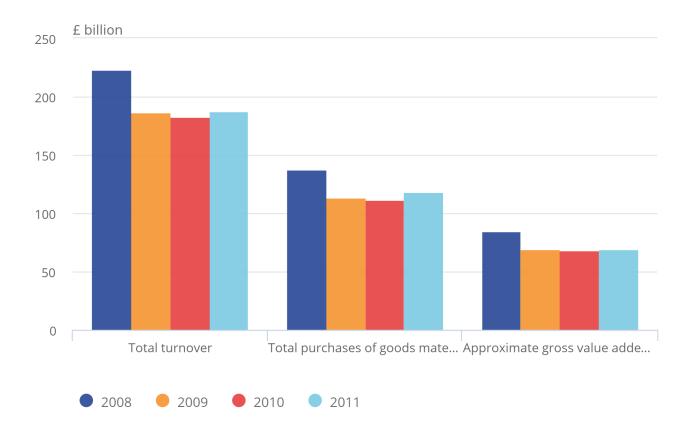


Table 3: Details of Income and Expenditure - Construction Industries (Section F) 2008-2011

£ billion

Standard Industrial Classification Revised 2007 Section/Division	Year	Total turnover	Total purchases of goods materials and services	Approximate gross value added at basic prices (aGVA)
F - Construction industries		223	138	85
	2009	186	114	69
	2010	183	111	69
	2011	188	118	70
41 - Construction of buildings	2008	92	60	31
	2009	76	48	25
	2010	72	47	23
	2011	71	47	23
42 - Civil engineering	2008	48	33	15
	2009	42	29	13
	2010	37	24	13
	2011	38	27	12
43 - Specialised construction activities		84	45	39
	2009	68	37	31
	2010	74	41	33
	2011	79	44	34

Source: Office for National Statistics

Construction (Section F) consists of: Construction of buildings (Division 41); Civil engineering (Division 42), and Specialised construction activities (Division 43).

There was a mixed picture within Construction (Figures 8 and 9). The increase in aGVA was almost entirely due to Specialised construction activities (Division 43) which increased by £1.5 billion (4.6 per cent) between 2010 and 2011. This division may have been impacted by construction contracts in the run up to the London 2012 Olympics. This increase was offset by a £0.6 billion (4.7 per cent) fall in aGVA in Civil engineering (Division 42) which was suppressed by a large rise (9.7 per cent) in purchases (£2.4 billion) and a much smaller increase in turnover (3.5 per cent or £1.3 billion). Increased purchases for this division may have been impacted by rising material costs, particularly the price of steel. Construction of buildings (Division 41) saw a very small increase in aGVA over the same period.

Figure 8: Construction Industries (Section F) - Details of Approximate Gross Value Added (aGVA) by SIC Division 2008-2011

Figure 8: Construction Industries (Section F) - Details of Approximate Gross Value Added (aGVA) by SIC Division 2008-2011

Provisional 2011 United Kingdom data

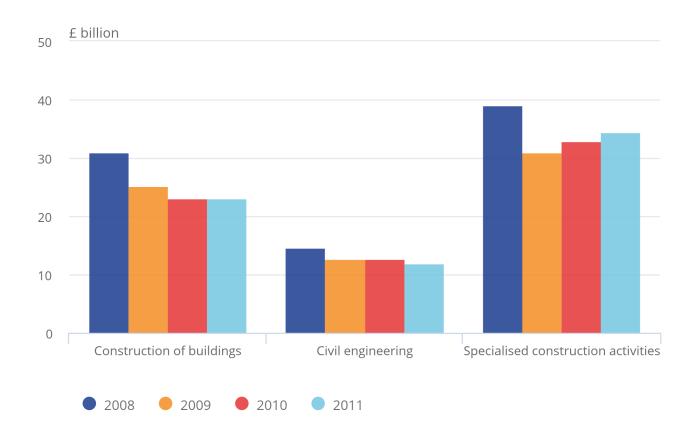
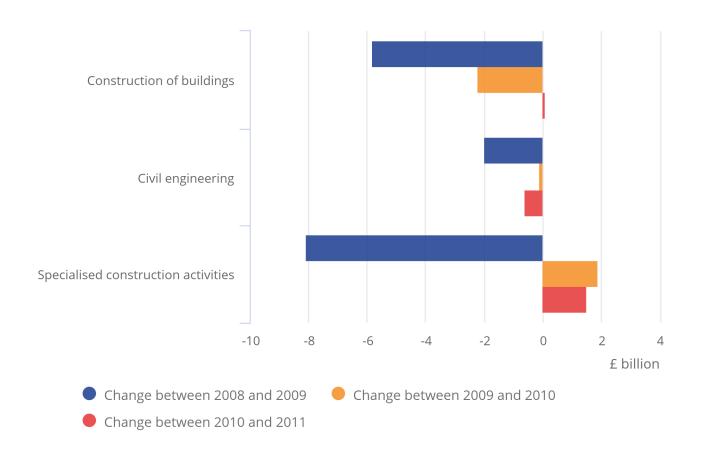


Figure 9: Construction Industries (Section F) - Change in Approximate Gross Value Added (aGVA) by SIC Division 2008-2011

Figure 9: Construction Industries (Section F) - Change in Approximate Gross Value Added (aGVA) by SIC Division 2008-2011

Provisional 2011 United Kingdom data



Source: Annual Business Survey (ABS) - Office for National Statistics

Notes for construction industries (Section F)

- 1. Please note that the ABS annual figures for the Construction industries should not be compared directly with annual figures in the monthly 'Output in the Construction Industry' release because:
 - · the two surveys measure different concepts of this industry
 - while both quote figures for a calendar year, the 'Output in the Construction Industry' are based on the aggregate of the responses to 12 monthly surveys, whereas ABS figures are based on annual responses covering a range of business years
 - the ABS figures will always be larger than those in the 'Output in the Construction Industry' because the latter excludes: Property developers (SIC 41.1); Payment on purchased services (architects, technical engineering, etc.); Payment to subcontractors, unless the subcontractors are not classified to construction and therefore are not part of the survey; Value of land; Value of materials sold (which are not part of a structure); and Fixtures, equipment and tools that are sold

7. Distribution industries (Section G)

The Distribution industries saw an increase of £98.6 billion in both turnover and purchases between 2010 and 2011 (8.1 per cent and 9.4 per cent respectively). However, due to changes in other components of approximate Gross Value Added at basic prices (aGVA), such as taxes, aGVA for Distribution increased slightly (by 0.9 per cent, £1.4 billion).

This was the second consecutive annual increase in aGVA, however the rate of growth was lower than the 3.3 per cent seen between 2009 and 2010. The size of the distribution industries, in terms of aGVA, remains below the level seen in 2008 (see Figure 10).

Figure 10: Details of Income and Expenditure - Distribution Industries (Section G) 2008-2011

Figure 10: Details of Income and Expenditure - Distribution Industries (Section G) 2008-2011

Provisional 2011 United Kingdom data

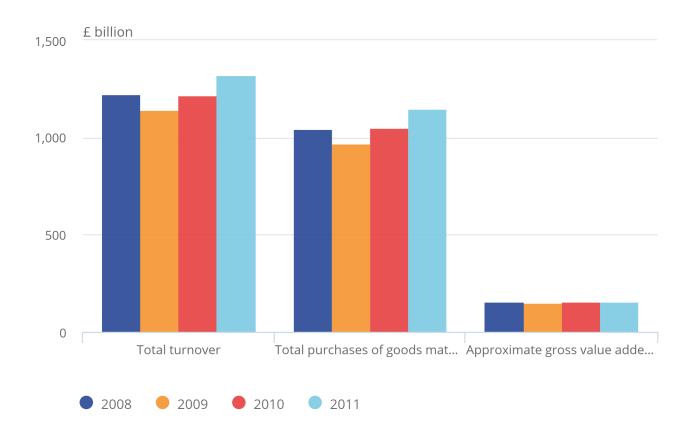


Table 4: Details of Income and Expenditure - Distribution Industries (Section G) 2008-2011

£ billion

Standard Industrial Classification Revised 2007 Section / Division	Year t	Total 1	otal purchases of goods materials and services ac	Approximate gross value dded at basic prices (aGVA)
G - Wholesale and retail trade; repair of motor vehicles and motorcycles	2008	1,225	1,046	158
	2009	1,143	969	149
	2010	1,220	1,048	154
	2011	1,318	1,147	156
45 - Wholesale and retail trade and repair of motor vehicles and motorcycles	2008	136	115	21
	2009	126	105	18
	2010	132	111	22
	2011	138	115	23
46 - Wholesale trade, except of motor	2008	777	685	72
vehicles and motorcycles	2009	697	615	61
	2010	757	677	60
	2011	839	758	63
47 - Retail trade, except of motor vehicles	2008	312	246	65
and motorcycles	2009	319	249	70
	2010	331	260	72
	2011	342	273	69

Source: Office for National Statistics

Distribution consists of: Wholesale and retail trade and repair of motor vehicles and motorcycles (Division 45), Wholesale trade, except of motor vehicles and motorcycles (Division 46) and Retail trade, except of motor vehicles and motorcycles (Division 47).

Performance within Distribution was mixed (see Figures 11 and 12). The growth in aGVA was driven by Wholesale trade, except of motor vehicles and motorcycles (Division 46) which saw an increase in aGVA between 2010 and 2011 for the first time since 2008, at the start the recession. The division saw an increase in both turnover and purchases, although growth in aGVA was suppressed slightly as the rate of growth for purchases (12.0 per cent) was above that for turnover (10.9 per cent).

Wholesale and retail trade and repair of motor vehicles and motorcycles (Division 45) also contributed to the growth in Distribution, with aGVA increasing by a £1.3 billion (5.6 per cent), as turnover increased at a higher rate than purchases (4.1 per cent and 3.7 per cent respectively). This increase in aGVA was the second consecutive annual increase for Wholesale and retail trade and repair of motor vehicles and motorcycles following the fall between 2008 and 2009. Between 2009 and 2010, aGVA increased by 21.2 per cent (£3.9 billion) largely due to the sale of new cars as the Government car scrappage scheme (which ran from May 2009 to April 2010) aided this industry. The market looks to have changed in composition and most of the increase in turnover between 2010 and 2011 was generated from the Maintenance and repair of cars (SIC Group 45.2), which saw an increase in aGVA of £1.0 billion (16.0 per cent), rather than from Sales of motor vehicles (SIC Group 45.1) which fell by £0.1 billion (0.9 per cent). This suggests that consumers may have brought forward purchases of new cars to take advantage of the scrappage scheme.

In contrast, aGVA in Retail trade, except of motor vehicles and motorcycles (Division 47), saw a decrease of 3.7 per cent (£2.7 billion) between 2010 and 2011, although the general trend without industry restructures and classification changes would be a lot flatter. The decrease in aGVA was seen as a result of a £10.7 billion (3.2 per cent) rise in total turnover but an even larger increase in purchases (£12.9 billion, 5.0 per cent). Perhaps unsurprisingly, reports from businesses indicate that turnover from mail orders and via the internet increased at a higher rate than turnover from shops. Although increasing, retail sales from mail orders and the internet remain a small share of total turnover.

Figure 11: Distribution Industries (Section G) - Details of Approximate Gross Value Added (aGVA) by SIC Division 2008-2011

Provisional 2011 United Kingdom data

Figure 11: Distribution Industries (Section G) - Details of Approximate Gross Value Added (aGVA) by SIC Division 2008-2011

Provisional 2011 United Kingdom data

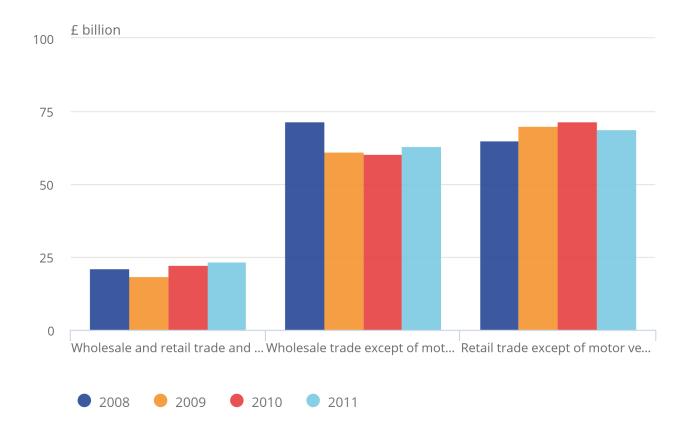
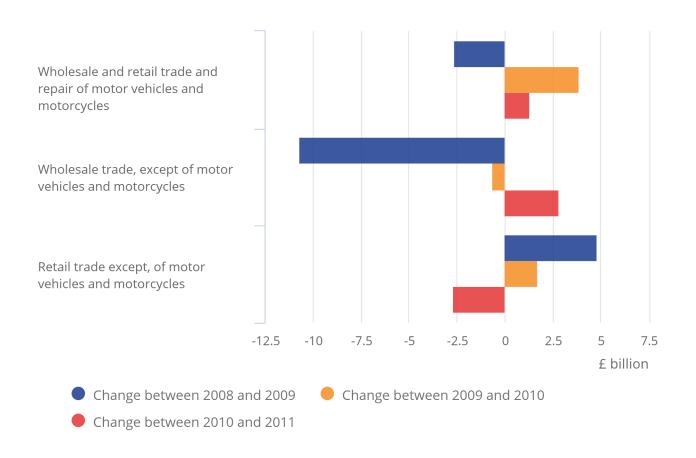


Figure 12: Distribution Industries (Section G) - Change in Approximate Gross Value Added (aGVA) by SIC Division 2008-2011

Figure 12: Distribution Industries (Section G) - Change in Approximate Gross Value Added (aGVA) by SIC Division 2008-2011

Provisional 2011 United Kingdom data



Source: Annual Business Survey (ABS) - Office for National Statistics

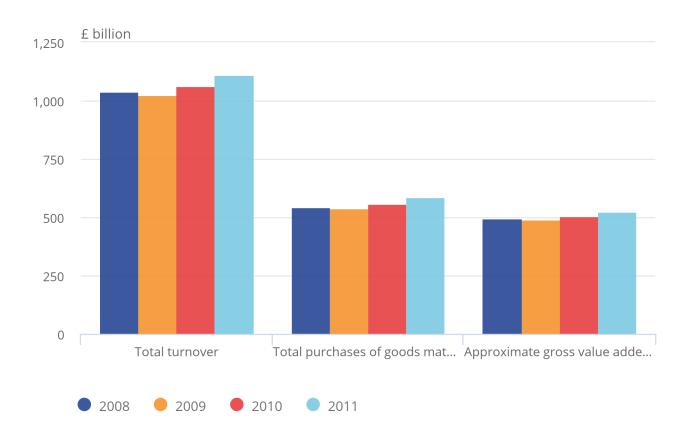
8. Service industries (Sections H-S)

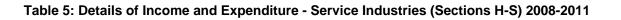
Between 2010 and 2011 over half of the £35.7 billion increase in approximate Gross Value Added at basic prices (aGVA) for the UK Business Economy was generated by the Service industries. Over this period Service turnover increased by 4.5 per cent (£47.9 billion) and purchases increased by 4.9 per cent (£27.5 billion) resulting in an aGVA increase of 4.3 per cent (£21.6 billion) (see Figure 13 and Table 5). This is a continuation of the improvement seen between 2009 and 2010 (when aGVA increased by 3.0 per cent (£14.5 billion)) and means that Service sector aGVA in 2011 was £28.4 billion (5.7 per cent) above the level seen in 2008.

Figure 13: Details of Income and Expenditure - Service Industries (Sections H-S) 2008-2011

Figure 13: Details of Income and Expenditure - Service Industries (Sections H-S) 2008-2011

Provisional 2011 United Kingdom data





Standard Industrial Classification Revised 2007 Section	Year Total turnover		Total purchases of goods materials and services	Approximate gross value added at basic prices (aGVA)	
H-S - Service industries	2008	1,038	544	497	
	2009	1,025	537	489	
	2010	1,061	558	504	
	2011	1,109	585	525	
H - Transport and Storage	2008	137	80	60	
	2009	127	73	57	
	2010	134	76	60	
	2011	143	84	61	
I - Accommodation and food	2008	68	36	32	
service activities	2009	66	37	29	
	2010	68	37	31	
	2011	73	38	35	
J - Information and communication	2008	180	94	88	
	2009	175	93	83	
	2010	184	100	85	
	2011	189	97	93	
K (part) - Insurance and reinsurance	2008	93	39	54	
	2009	99	42	57	
	2010	102	45	57	
	2011	91	49	41	
L - Real estate activities	2008	42	17	26	
	2009	42	17	26	
	2010	45	17	28	
	2011	48	18	30	
M - Professional, scientific and	2008	191	85	106	
technical activities	2009	188	83	105	
	2010	191	86	105	
	2011	200	87	115	
N - Administrative and support	2008	150	80	70	
service activities	2009	144	78	66	
	2010	150	78	72	
	2011	167	86	81	
P (part) - Education	2008	26	16	10	
	2009	29	17	11	
	2010	28	15	13	
	2011	29	16	13	
Q (part)- Human health and social work activities	2008	34	12	22	

	2009	38	13	24
	2010	40	15	24
	2011	41	16	26
R - Arts, entertainment and recreation	2008	88	70	16
	2009	89	69	17
	2010	90	73	15
	2011	99	80	17
S - Other service activities	2008	30	16	14
	2009	29	15	14
	2010	30	16	14
	2011	29	16	13

Source: Office for National Statistics

Notes:

1. Validation of data returns for 2011 have highlighted that a small number of businesses within the Finance and insurance sector were returning global figures rather than UK only. Results for this sector are experimental and any comparisons between years should be undertaken with caution. Further validation is being undertaken and a revised 2010 estimate will be available in the June 2013 ABS publication

Most sections within the Service industries saw an increase in aGVA between 2010 and 2011 with the main drivers of the improvement over this period being Professional, scientific and technical activities (Section M), Administrative and support activities (Section N) and Information and communication (Section J), which together accounted for an increase in aGVA of £28.0 billion.

Professional, scientific and technical activities (Section M)

Turnover in Professional, scientific and technical activities (Section M) increased by 5.0 per cent (£9.5 billion) between 2010 and 2011, while purchases increased by only 1.1 per cent (£1.0 billion). This resulted in a substantial increase in aGVA of 9.4 per cent (£9.9 billion), taking aGVA in this sector to £8.7 billion (8.2 per cent) above the level seen in 2008. This broad section, which covers activities such as Legal and accounting services, Scientific research and development and Advertising and market research, saw increases in almost all its divisions between 2010 and 2011, although the main driver was Activities of head offices and Management consultancy activities (Division 70), which saw a £4.1 billion (16.6 per cent) increase in aGVA as turnover increased by £2.7 billion (6.0 per cent) and purchases fell by £1.5 billion (6.9 per cent).

Administrative and support activities (Section N)

Administrative and support activities (Section N) also saw a large increase in aGVA between 2010 and 2011. Turnover increased by £17.2 billion (11.5 per cent), while the increase in purchases was smaller at £7.6 billion (9.7 per cent) resulting in an increase in aGVA of £9.5 billion (13.2 per cent). This is the second consecutive annual increase in aGVA in Administrative and support activities and means aGVA is now £10.9 billion (15.5 per cent) above that seen in 2008, at the start of the recession.

The main driver behind the increase in the Administrative and support service activities was Rental and leasing activities (Division 77) which saw increases of 15.7 per cent (£3.6 billion) in turnover and 3.0 per cent (£0.3 billion) in purchases, resulting in a 28.2 per cent (£3.3 billion) increase in aGVA.

Information and communication (Section J)

Information and communication (Section J) saw an increase in turnover of 2.7 per cent (£5.0 billion) between 2010 and 2011. This increase, coupled with a decrease in purchases of 2.6 per cent (£2.6 billion) has resulted in a positive increase in aGVA of 10.2 per cent (£8.6 billion). This growth rate is an improvement on the 1.3 per cent (£1.1 billion) increase evident between 2009 and 2010 and means that aGVA in Information and communications is now £5.4 billion (6.2 per cent) above the level seen in 2008, at the start of the recession.

All divisions within Information and communications saw an increase in aGVA between 2010 and 2011, but one third of the increase in aGVA came from Computer programming, consultancy and related activities (Division 62). Between 2010 and 2011, turnover in this division increased by £2.9 billion (4.5 per cent), against decreasing purchases which fell £0.1 billion (0.3 per cent) leading aGVA to increase by £2.9 billion (8.0 per cent).

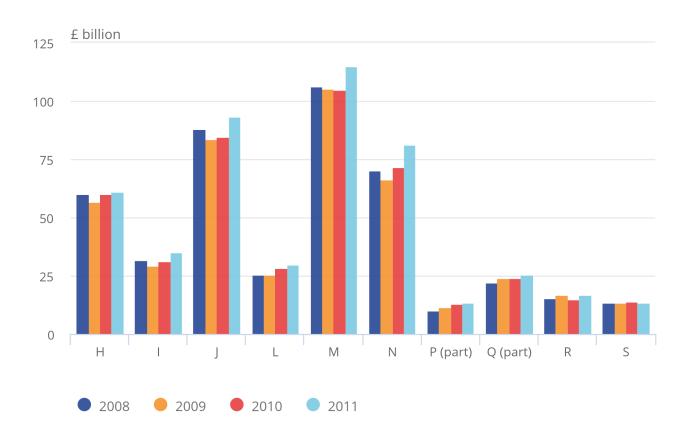
Finance and insurance (Section K (Part))

The results for Finance and insurance (part of Section K) suggest that aGVA decreased between 2010 and 2011, however, this result is experimental and comparisons between years should be undertaken with caution. Validation of data returns for 2011 have highlighted that a small number of businesses within the Finance and insurance sector were returning global figures rather than UK only. While revised results are likely to still show a contraction in the Finance and insurance sector between 2010 and 2011, the size of the fall is likely to be smaller than the results currently indicate. Further validation is being undertaken and a revised 2010 estimate will be published in the ABS Revised Results available in June 2013.

Figure 14: Service Industries (Sections H-S) - Details of Approximate Gross Value Added (aGVA) by SIC Section 2008-2011

Figure 14: Service Industries (Sections H-S) - Details of Approximate Gross Value Added (aGVA) by SIC Section 2008-2011

Provisional 2011 United Kingdom data



Source: Annual Business Survey (ABS) - Office for National Statistics

Notes:

- 1. H Transport and storage
- 2. I Accommodation and food service activities
- 3. J Information and communication
- 4. L Real estate activities
- 5. M Professional, scientific and technical activities
- 6. N Administrative and support service activities
- 7. P (part) Education
- 8. Q (part) Human health and social work activities
- 9. R Arts, entertainment and recreation
- 10. S Other service activities
- 11. Section K (part) Finance and insurance is not shown

Figure 15: Service Industries (Sections H-S) - Change in Approximate Gross Value Added (aGVA) by SIC Section 2008-2011

Figure 15: Service Industries (Sections H-S) - Change in Approximate Gross Value Added (aGVA) by SIC Section 2008-2011

provisional 2011 United Kingdom data



Source: Annual Business Survey (ABS) - Office for National Statistics

Notes:

- 1. H Transport and storage
- 2. I Accommodation and food service activities
- 3. J Information and communication
- 4. L Real estate activities
- 5. M Professional, scientific and technical activities
- 6. N Administrative and support service activities
- 7. P (part) Education
- 8. Q (part) Human health and social work activities
- 9. R Arts, entertainment and recreation
- 10. S Other service activities
- 11. Section K (part) Finance and insurance is not shown

9. Background notes

1. Annual Business Survey - ABS

The Annual Business Survey (ABS), formerly the Annual Business Inquiry part 2 (ABI/2), produced by the Office for National Statistics (ONS), is the key resource for understanding the detailed structure, conduct and performance of businesses across the UK. It is an annual survey of businesses covering the production, construction, distribution and service industries which represent the UK Business Economy. This is about two thirds of the UK's whole economy in terms of Gross Value Added.

The ABS survey samples approximately 62,000 businesses in Great Britain from a population of over 1.8 million businesses in the sample frame on the Inter-Departmental Business Register (IDBR). The responding businesses provide information such as their turnover, purchases, employment costs, capital expenditure and stocks. For further details on the industry sectors covered see background note 3.

Data for approximately 9,000 Northern Ireland businesses are collected by the Department of Finance and Personnel Northern Ireland and contribute to the UK estimates.

In this National Statistics publication, a range of estimates are published including turnover, purchases, approximate Gross Value Added at basic prices (aGVA) and employment costs for industry sectors and the UK Business Economy. These estimates are collected and presented as monetary values, and give a snapshot of UK business activity: that can be used to understand the level of the contributions to the UK economy from different business sectors at any one time. The statistics produced are referred to as structural business statistics.

There are a wide range of uses of the ABS data and some of these are summarised in background note 11.

One of the key uses is to help improve the overall quality of the UK National Accounts and the measurement of Gross Domestic Product (GDP). These National Accounts tables also show industry estimates of GVA at basic prices, which differ from those shown in the ABS. Further information on the calculation of approximate Gross Value Added in the ABS, and how it differs from National Accounts GVA are given in background note 3.

For an estimate of the cost to GB businesses for providing their data to the ABS (known as compliance cost) see appendix G of the ONS Compliance Costs Report.

Visit the <u>ABS webpages</u> for more in-depth information about the ABS, plus the latest news on survey changes and developments.

2. National Statistics

The United Kingdom Statistics Authority reviewed ABS outputs in their report <u>'Assessment of compliance with the Code of Practice for Official Statistics: Statistics from the Annual Business Survey – Assessment Report 180'</u>.

Following the ABS response to the report, the UK Statistics Authority have since designated these statistics as National Statistics in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the Code of Practice for Official Statistics.

Designation can be broadly interpreted to mean that the statistics:

meet identified user needs:

- are well explained and readily accessible
- are produced according to sound methods
- are managed impartially and objectively in the public interest

Once statistics have been designated as National Statistics it is a statutory requirement that the Code of Practice shall continue to be observed.

3. ABS coverage

The results in this Statistical Bulletin represent approximately two thirds of the UK economy in terms of Gross Value Added. In previous releases the UK Business Economy has been referred to as the Whole Economy.

The industries covered are:

- Agriculture (support activities SIC 01.6 only), forestry and fishing Section A
- Production industries Sections B-E
- · Construction industries Section F
- Distribution industries Section G
- Service industries Sections H, I, J, K (SIC 65.1 and 65.2 only), L, M, N, P (private provision only), Q (private provision only in SIC 86.1 and 86.9), R and S.

The main industries excluded are:

- Agriculture (SIC 01.1, 01.2, 01.3, 01.4 and 01.5 in Section A)
- Financial intermediation (SIC 64, 65.3, 66 in Section K)
- Public administration and defence (Section O)
- Education (public provision in Section P)
- Health (SIC 86.2, public provision in SIC 86.1 and 86.9 in Section Q)

Only part of the finance sector is covered by the ABS (Insurance and reinsurance only (SIC 65.1 and 65.2)) and this coverage is relatively new, beginning in 2008. Development work was undertaken to ensure the questionnaire was as relevant as possible for this sector. The ABS team will continue to monitor the data being collated to ensure it is as relevant and accurate as possible but until a longer time series is available results remain experimental.

Standard Industrial Classification

ABS results are classified according to the <u>Standard Industrial Classification of Economic Activities (SIC)</u> system. The UK is required by European legislation to have a system of classification consistent with the European Union's industrial classification system. The system underwent a major review in 2007. ABS data have been collected and published on the SIC 2007 system since the reference year 2008. Other revisions to the system occurred in 1958, 1968, 1980, 1992, 1997, and 2003.

UK SIC 2007 is divided into 21 sections, each denoted by a single letter from A to U. The letters of the sections can be uniquely defined by the next breakdown, the divisions (denoted by two digits). The divisions are then broken down into groups (three digits), then into classes (four digits) and, in several cases, again into subclasses (five digits). So for example:

- Section C: Manufacturing (comprising divisions 10 to 33)
- Division 13: Manufacture of textiles
- Group 13.9: Manufacture of other textiles
- Class 13.93: Manufacture of carpets and rugs

Subclass 13.93/1: Manufacture of woven or tufted carpets and rugs

The full structure of SIC 2007 consists of 21 sections, 88 divisions, 272 groups, 615 classes and 191 subclasses.

Calculation of Gross Value Added estimates

The approximate estimate of Gross Value Added at basic prices (aGVA) published in this release is a measure of the income generated by businesses within their industries and sectors, less the cost of goods and services used to create the income. The main component of income is turnover, while purchases is the main component of the consumed goods and services (referred to as intermediate consumption). Stock levels which may rise or fall can also have an impact on aGVA, as can the values of subsidies received or duty paid. Businesses' labour costs (for example, wages and salaries) are paid from the value of GVA, leaving an operating surplus which is a good approximation for profit. The cost of capital investment, financial charges and dividends to shareholders are met from the operating surplus.

The ABS publishes aGVA at 'basic prices': <u>Gross Value Added (GVA) at basic prices</u> is the <u>output</u> at <u>basic prices</u> minus <u>intermediate consumption</u> at <u>purchaser prices</u>. The basic price is the amount receivable by the producer from the purchaser for a unit of a product, minus any tax payable plus any subsidy receivable on that product.

There are differences between the ABS approximate measure of Gross Value Added and the measure published by National Accounts. The ABS measure of aGVA is called 'approximate' because it does not fully allow for some National Accounts concepts such as taxes, subsidies or income earned in kind. National Accounts carry out coverage adjustments, quality adjustments, coherence adjustments and conceptual and value adjustments such as subtracting taxes and adding subsidies not included in the ABS measure. The National Accounts estimate of GVA (see section 2.3 of UK National Accounts) uses input from the ABS and a number of other sources, and covers the whole UK economy, whereas ABS does not include some parts of the Agriculture and Financial activities sectors, or Public administration and defence.

The ABS measure covers only market output, whereas National Accounts add non-market output (for example government services supplied for free such as education, charities), and own account output (products and services produced and consumed by a business, for example a farm growing feed for its own livestock). The ABS total aGVA for the UK Business Economy is around two thirds of the National Accounts whole economy GVA, because of these differences in coverage and calculation. The ABS estimates are also not adjusted for inflation.

GVA at basic prices published by National Accounts in the Input-Output Supply and Use tables is used to calculate the annual level of the UK Gross Domestic Product. By making the adjustments described, the National Accounts estimates are fully compliant with the European System of Accounts 1995. Further details are available in the notes to the United Kingdom Input-Output Analyses.

More detailed information of the differences between aGVA and GVA is available in the <u>ABS Technical</u> Report (1.61 Mb Pdf) published on the <u>ABS webpages</u>.

Business Register and Employment Survey

The reference tables that support this release include estimates of employment. The ABS does not collect employment level information, so instead this key information is taken from another source. In the past, employment data were collected via the Annual Business Inquiry/ Part 1 (ABI/1), however, in 2009 ABI/1 was replaced with the Business Register and Employment Survey (BRES). The ABS and BRES are both optimal for their respective purposes, however caution should be taken when combining the financial data from the ABS and employment information from BRES to calculate estimates due to differences in methodology. More information on the differences between ABS and BRES is available in the ABS Technical Report (1.61 Mb Pdf) published on the ABS webpages.

Changes in the treatment of working owners in the 2011 BRES have led to a discontinuity between the 2010 and 2011 BRES employment estimates. The discontinuity was due to double counting being removed in 2011 but not in earlier years. The BRES employment estimates presented in the ABS reference tables have not been adjusted to account for this discontinuity so care should be taken when making comparisons between employment in 2011 and that in earlier years. More detail about the discontinuity can be found on the BRES webpages.

4. ABS Quality information

A <u>Quality and Methodology (QMI) report (149.3 Kb Pdf)</u> for the ABS can be found on the ONS website. The aims of the QMI report is to provide users with a greater understanding of ONS statistics, their uses and the methods that are used to produce them.

The ABS is a sample survey. As with all sample surveys, estimates are subject to various sources of error. The total error in a survey estimate is the difference between the estimate derived from the data collected and the true (unknown) value for the population. The total error consists of two main elements; the sampling error and the non-sampling error. The ABS was designed to minimise both these errors. The standard error is the estimated value of the sampling error. The estimate for a variable, plus and minus the standard error for the variable, gives a range in which the true unknown value for the population should lie. The closer the standard error to 0, the more reliable the estimate.

The coefficient of variation is the standard error of a variable divided by the survey estimate, and it is used to compare the relative precision across surveys or variables. The closer the coefficient of variation is to 0, the more reliable the estimate. Coefficients of variation enable the comparison of the relative precision across surveys or variables. Standard errors and coefficients of variation for turnover, aGVA, purchases, employment costs and capital expenditure are available in the quality measures table published with this release.

More detailed information on these and other quality and methodology issues is available in the <u>ABS Technical Report (1.61 Mb Pdf)</u> published on the <u>ABS webpages</u>.

Selective editing

When ABS responses are received, checks are undertaken to ensure the information is correct. This is known as editing and validation. Selective editing has been used to validate responses for the first time for the 2011 results using software called SELEKT. SELEKT is a generic selective editing tool which highlights responses which appear to be in error if they will have a large influence on key estimates. Those responses with the highest score are prioritised for editing and validation. This increases the efficiency of the editing process by focusing on the responses with the highest impact.

The introduction of selective editing should at least maintain, if not improve the quality of the ABS results as it should: minimise the bias introduced by processing (removing over-editing); remove non-value adding activities from the process; and focus resources to errors that impact on the results.

However, the full impact on quality is not yet known. This will continue to be monitored and any updates will be included with future ABS releases. For more information on SELEKT, see Chapter 5 of the <u>ABS Technical Report (1.61 Mb Pdf)</u>.

5. Response rates

The figures in this release are based on an annual survey of businesses. Provisional 2011 results are based on a response rate of 75.1 per cent. Response rates by different sectors can be found in the Quality Measures spreadsheet accompanying this release.

6. ABS revisions

ABS estimates are revised in line with the ABS Revisions Policy. The revisions policy is available in the <u>ABS Technical Report (1.61 Mb Pdf)</u> to assist users with their understanding of the cycle and frequency of data revisions. Users of this release are strongly advised to read this policy before using the data for research or policy related purposes.

Planned revisions usually arise from either the receipt of additional data or the correction of errors to existing data by businesses responding to the ABS. Those of significant magnitude will be highlighted and explained.

Revisions to published ABS results can be expected at the following times in the normal course of operation of the ABS:

• national figures for the current reference year will usually be revised between the provisional and revised data releases

 national figures for the previous reference year will be revised at the current survey year's revised data release

As an example of the timing and scale of revisions, provisional national data for 2010 were first published in November 2011 and were then revised in the June 2012 release. Between the provisional and revised 2010 national releases there was an overall change in the estimate of UK Business Economy turnover of 0.3 per cent (£8 billion). At the same time (June 2012) national data for 2009 were also revised.

A table showing the size of revisions is published alongside the Statistical Bulletins and revised estimates of significant magnitude will be highlighted and explained in the statistical release.

All other revisions will be regarded as unplanned and will be dealt with by non-standard releases. All revisions will be released in compliance with the same principles as other new information.

7. ABS future releases

Further releases of ABS data will be:

- 13 June 2013 Revised Results for ABS 2011 (at UK national level) (and final 2010 estimates)
- 25 July 2013 Provisional Regional Results for ABS 2011
- 14 November 2013 Provisional Results for ABS 2012 (at UK national level)

The ABS team are reviewing the publication process following user feedback on timeliness to investigate whether the publication dates can be brought forward. Initial investigations show there is room for significant time savings, although to implement the changes will be a long term process, and some challenges still remain. A progress report titled ""Review of ABS Timeliness", detailing the options for earlier publication and the challenges involved, has been published on the ABS quality and methods webpages.

8. Disclosure control and symbols

It is sometimes necessary to suppress figures for certain items in order to avoid disclosing information about an individual business. Further information on why data are suppressed is available in the ONSDisclosure Control Policy or in the ABS Technical Report (1.61 Mb Pdf).

The following symbols are used throughout the ABS releases:

- * information suppressed to avoid disclosure
- .. not available
- nil or less than half the level of rounding

9. Access to more ABS data

Provisional 2011 UK national results at the industry class level (4 digit Standard Industrial Classification 2007) are available free of charge via the 'Data in this release' button at the top of this publication, or from the <u>ABS webpages</u>. The published variables include turnover, purchases, aGVA and employment costs.

Additional standard extracts containing more detail are available on request. Bespoke analyses are also available but there will be a charge for these. For more information about either of these services please email abs@ons.gov.uk, or telephone +44(0) 1633 456592 for standard extracts, or +44 (0)1633 456601 for bespoke special analyses.

From June 2012, any bespoke analysis carried out for ABS customers will be listed on the ONS data available on request webpages, and the data sets will be available free of charge on request.

10. International comparisons

International comparisons of structural business statistics are available from Eurostat (for the European Union), and the Organisation for Economic Co-operation and Development (OECD):

<u>Eurostat</u>: analysis of the European business economy

• OECD

11. Uses and users of ABS statistics

ABS outputs may be used to answer questions such as:

- how much wealth has been created in a particular industry?
- has there been a shift in activity from one industrial sector to another, and which industry groups /classes/subclasses are driving the change?
- are any industries particularly dominant in specific regions or countries of the UK and are there structural changes over time?

 how productive is a particular industry, such as the chemicals sector, and what is its operating profitability?

There are a wide range of users that view, download and utilise the ABS data. Key users of the output include:

National Accounts

The statistics produced help to improve the overall quality of the UK National Accounts and the measurement of Gross Domestic Product (GDP). The ABS forms a major data input to the production of Input-Output Annual Supply and Use Tables used to set the annual level of UK GDP. The Supply and Use tables show the sales and purchases relationships between consumers and producers by industry (see section 2.1 of UK National Accounts (5.31 Mb Pdf)).

Indices of Services and Production

Use ABS data to calculate the weights used to produce the indexes, and to calculate the deflation of turnover.

Eurostat

ABS is the main source of data supplied to <u>Eurostat</u> to meet the requirements of the European Structural Business Statistics (SBS) Regulation. This regulation ensures that key statistics on the structure of businesses are composed in a way which is comparable across Europe. Eurostat use SBS data to inform and monitor European Union policy.

Scottish Government and the Welsh Government

The financial information is also used by the <u>Scottish Government</u> and the <u>Welsh Government</u> in the compilation of regional and country specific Input-Output tables (for example <u>Scottish Input-Output</u>) and Indices of Production (for example <u>Welsh Indices of Production</u>). The resulting outputs are used to inform and monitor policy.

Department for Business, Innovation & Skills (BIS)

BIS use ABS data to assess the structure and performance of UK industries.

Local authorities

Data are used for economic research, planning purposes, lobbying and economic strategy development.

Business consultants

Use these data to understand trends in industry sectors and UK regions.

Marketing experts

Use these data to undertake demographic mapping and market segmentation.

Other local and national government departments and bodies, businesses, academics and the general public use these data for research, modelling or forecasting and to track industry trends.

More detailed information on the uses and users of ABS is available in the <u>ABS Technical Report (1.61 Mb Pdf)</u> published on the <u>ABS webpages</u>.

12. ABS user engagement

We are constantly aiming to improve this release and its associated commentary. We would welcome any feedback you might have, and would be particularly interested in knowing how you make use of these data to inform your work. Please contact us via email: abs@ons.gov.uk or telephone Heather Bovill on +44 (0) 1633 455107.

There is a <u>Business and Trade Statistics Community</u> on the StatsUserNet website, which is the Royal Statistics Society's new interactive site for users of official statistics. The community objectives are to

promote dialogue between users and producers of official business and trade statistics about the structure, content and performance of businesses within the UK. Anyone can join these discussions by registering via the link above.

The result of a recent online user survey together with feedback received via other sources, have been published along with our plans to act on the feedback received in the <u>Responding To ABS User Needs (223.7 Kb Pdf)</u> report on the <u>ABS webpages</u>.

13. Social media

Follow ONS on Twitter and receive up-to-date information about our statistics.

Like ONS on Facebook to receive our updates in your news feed and to post comments on our page.

14. Government Statistical Service (GSS) business statistics

To find out about other official business statistics, and choose the right data for your needs, use the <u>GSS</u> <u>Business Statistics Interactive User Guide</u>. By selecting your topics of interest, the tool will pinpoint publications that should be of interest to you, and provide you with links to more detailed information and the relevant statistical releases. It also offers guidance on which statistics are appropriate for different uses.

A comparison of structural business statistics in Europe can be found in <u>Eurostat's Structural Business</u> <u>Statistics Overview</u>.

15. Special events

ONS has recently published commentary, analysis and policy on 'Special Events' which may affect statistical outputs. For full details visit the <u>Special Events</u> page on the ONS website.

16. Details of the policy governing the release of new data are available by visiting www.statisticsauthority.gov.uk/assessment/code-of-practice/index.html or from the Media Relations Office email: media.relations@ons.gov.uk

These National Statistics are produced to high professional standards and released according to the arrangements approved by the UK Statistics Authority.