

Consumer Services

May 2009

Figures marked thus (*) are weighted percentages of respondents. All other figures are percentage balances, i.e. the difference between those replying 'more', 'up', 'above normal' or 'more than adequate' and those replying 'less', 'down', 'below normal' or 'less than adequate'.

	2008				2009	
	Feb	May	Aug	Nov	Feb	May
1 Optimism re business situation	-48	-60	-61	-81	-53	+15
VOLUME AND VALUE OF BUSINESS						
2 Level of business in value terms (above normal/below normal)	-37	-54	-14	-36	-47	-69
2a Level of business in volume terms (above normal/below normal)	-34	-49	-13	-51	-51	-61
3 Value of business						
- past three months	-1	-38	+6	-29	-49	-30
- next three months	-8	-23	+6	-48	-38	-10
Volume of business						
- past three months	-7	-44	+2	-30	-34	-53
- next three months	-11	-15	+13	-46	-19	-36
PRICES, COSTS AND PROFITABILITY						
5a Average selling prices						
- past three months	+25	+40	+20	+5	0	+18
- next three months	+45	+14	+28	-6	+23	-2
5c Total costs per person employed						
- past three months	+28	+50	+62	+41	+20	+5
- next three months	+36	+51	+53	+26	+20	-4
5d Overall profitability of business						
- past three months	-9	-39	-34	-41	-68	-33
- next three months	-19	-39	-44	-47	-65	-14
EMPLOYMENT AND TRAINING						
6a Numbers employed						
- past three months	-6	-12	-1	+9	-22	-30
- next three months	-9	+7	+6	-25	-44	-6
6b Training/retraining expenditure						
- past three months	-20	-16	+11	+5	-35	-27
- next three months	-23	-4	+8	-5	-51	-26
CAPITAL EXPENDITURE						
7 Capital expenditure over the next 12 months on:						
Land and buildings	+14	-21	-32	-48	-47	-17
Information technology	-1	+4	-26	-23	-34	-18
Vehicles, plant & machinery	-8	-3	-10	-53	-49	-38

		2008				2009	
		Feb	May	Aug	Nov	Feb	May
8	Reasons for any expected capital expenditure authorisations over the next 12 months *						
	Expand capacity	35	29	36	34	46	22
	Increase efficiency/speed/to exploit new technology	47	38	49	32	47	17
	Replacement	34	33	68	77	48	66
	Provide new services	26	10	26	21	15	24
	Reach new customers	27	44	38	19	33	33
	Related to euro	0	0	0	0	0	6
	E-business related	13	14	3	16	25	21
	Other	2	5	0	2	1	2
9	What factors are likely to limit your capital expenditure authorisations over the next 12 months*						
	Inadequate net return	13	14	38	46	28	27
	Shortage of internal finance	16	29	11	10	38	12
	Inability to raise external finance	1	10	2	10	23	30
	Cost of finance	20	8	15	29	6	8
	Uncertainty about demand/sales	54	48	63	68	41	56
	Shortage of labour (including managerial/supervisory staff)	10	8	8	3	0	3
	Other	5	7	2	4	12	2
BUSINESS PROSPECTS							
10	Expected business expansion	-59	-39	-53	-52	-57	-35
11	Factors likely to limit ability to increase level of business over the next 12 months *						
	Level of demand/sales	83	73	72	79	86	70
	Availability of professional staff	7	3	11	1	0	3
	Availability of clerical/other staff	7	0	7	6	2	5
	Adequacy of systems capacity	11	0	2	6	8	1
	Ability to raise funds	2	6	18	13	26	31
	Domestic competition	29	25	16	29	26	25
	Overseas competition	2	10	2	5	3	1
	Other	8	13	5	9	4	10

SURVEY DETAILS

The May 2009 Service Sector Survey was conducted between 29th April and 13th May 2009.

179 firms replied.

Business and Professional Services

May 2009

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		2008				2009	
		Feb	May	Aug	Nov	Feb	May
1	Optimism re business situation	-28	-18	-42	-79	-46	-6
VOLUME AND VALUE OF BUSINESS							
2	Level of business in value terms (above normal/below normal)	-20	-17	-42	-44	-68	-44
2a	Level of business in volume terms (above normal/below normal)	-19	-12	-40	-45	-68	-45
3	Value of business						
	- past three months	-6	+5	-27	-35	-62	-54
	- next three months	-8	-1	-24	-62	-34	-20
	Volume of business						
	- past three months	+6	+10	-31	-34	-65	-43
	- next three months	-2	+4	-27	-57	-42	-11
PRICES, COSTS AND PROFITABILITY							
5a	Average selling prices						
	- past three months	+4	-15	-2	-10	-22	-35
	- next three months	+3	+6	-10	-16	-35	-28
5c	Total costs per person employed						
	- past three months	+46	+33	+49	+1	+8	-16
	- next three months	+56	+43	+45	+3	-11	-7
5d	Overall profitability of business						
	- past three months	+9	-2	-25	-39	-44	-26
	- next three months	-4	-6	-30	-54	-46	-25
EMPLOYMENT AND TRAINING							
6a	Numbers employed						
	- past three months	+20	+15	-6	-18	-51	-45
	- next three months	+12	+8	-20	-41	-45	-21
6b	Training/retraining expenditure						
	- past three months	-1	+15	+1	-21	-34	-24
	- next three months	+10	+13	-3	-17	-29	-6
CAPITAL EXPENDITURE							
7	Capital expenditure over the next 12 months on:						
	Land and buildings	-10	+6	-16	-49	-43	-35
	Information technology	+23	+9	-16	-39	-37	-15
	Vehicles, plant & machinery	+7	-16	-47	-48	-54	-43

		2008				2009	
		Feb	May	Aug	Nov	Feb	May
8	Reasons for any expected capital expenditure authorisations over the next 12 months *						
	Expand capacity	34	30	13	17	14	6
	Increase efficiency/speed/to exploit new technology	73	57	40	54	56	55
	Replacement	56	65	57	49	47	55
	Provide new services	32	27	24	28	27	24
	Reach new customers	37	25	27	33	29	12
	Related to euro	0	4	0	1	0	0
	E-business related	28	22	5	6	11	13
	Other	2	0	3	1	1	2
9	What factors are likely to limit your capital expenditure authorisations over the next 12 months*						
	Inadequate net return	42	37	20	37	18	38
	Shortage of internal finance	23	19	8	15	13	10
	Inability to raise external finance	6	4	22	8	20	10
	Cost of finance	3	9	9	9	6	2
	Uncertainty about demand/sales	50	48	64	86	87	81
	Shortage of labour (including managerial/supervisory staff)	18	7	8	2	1	1
	Other	2	2	4	2	2	3
BUSINESS PROSPECTS							
10	Expected business expansion	-26	-10	-54	-54	-60	-41
11	Factors likely to limit ability to increase level of business over the next 12 months *						
	Level of demand/sales	86	83	77	96	98	97
	Availability of professional staff	65	46	17	13	7	3
	Availability of clerical/other staff	4	4	1	0	0	0
	Adequacy of systems capacity	7	10	4	5	2	5
	Ability to raise funds	5	7	5	12	23	12
	Domestic competition	52	52	46	39	37	48
	Overseas competition	19	26	18	17	8	19
	Other	7	0	3	1	0	1

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The May 2009 Service Sector Survey was conducted between 29th April and 13th May 2009.

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