Design Council

Design in Britain
2004–2005

Using design

Innovate and compete

Benefits to business and the economy

Introduction

Can the UK economy meet the challenge to compete effectively in an ever more demanding business environment? Bigger, freer global markets, increasing speeds of technological advance and more demanding consumers are at the top of a long list of tests for business leaders.

Design in Britain answers with a resounding 'yes' based on responses to one of the UK's largest annual business surveys. The research demonstrates the centrality of design skills to the competitiveness and growth of successful UK businesses and their ability to create and sell great new products and services that meet real customer needs. For example, companies that see design as integral to their work report its direct, positive impact on practically every measure of business performance, including sales, profit, quality, product and service development and market share. The survey shows that half of companies that ignore design are driven to compete mainly on price, cutting margins and risking their long-term viability. On the other hand, where businesses make use of design skills, only one fifth compete mainly on price.

Shockingly, only one third of UK companies have introduced a new product or service in the past three years – a certain indicator of long-term decline. Our research shows clearly that too few UK companies are equipped with the skills and abilities to integrate and manage design

within their business. Only 3% are even clear that they have an accounting mechanism to measure their return on investment.

The facts are convincing, but it's not good enough to be convinced by facts. To meet the challenge, business leaders, educators and policy makers will need to display real changes in behaviour. They will need to build design into their strategies for success.

David Kester
Chief Executive

The data in Design in Britain is drawn from the Design Council's 2004 National Survey of Firms, unless otherwise referenced. The survey is based on interviews with 1,500 companies across all sizes and sectors of UK business. The research is undertaken by an independent company, Public and Corporate Economic Consultants (PACEC). The methodology is described in more detail on page 41.

DTI Innovation Report

Research shows that design skills are vital to innovation and can significantly enhance a company's financial performance.

Unfortunately, not enough businesses use design to connect new ideas with market opportunities, and lack of design ingenuity usually indicates static or poor overall business performance.

In short, the most successful and imaginative companies use design to enable innovation. Better design will be crucial in developing goods and services which use less energy or materials, or are more easily reused and recycled.

Source: DTI Innovation Report – Competing in the Global Economy: The Innovation Challenge, Department of Trade and Industry, 2003

Giving design a key role in running a company means better financial performance, robust innovation and a stronger flow of the new products and services that drive competitiveness.

Competitiveness, quality, productivity

Bigger profits, better products

Investing in design pays off for UK businesses. The more they use it, the bigger their profits and turnover, the better their quality, productivity and competitiveness – and the more likely they are to be growing, not standing still.

Nearly half of businesses where design is integral have seen turnover, profits and competitiveness increase, and more than seven out of ten say design has increased the quality of products and services. Growing businesses are far more likely to be getting these benefits than companies with static or shrinking turnover.

How have design, innovation and creativity contributed to your business over the last three years?

		In the past year our turnover has			Role of design in our company			
	All companies	Got smaller	Not changed	Grown	No role	Limited	Significant	Integral
Improved quality of services/ products	17	7	11	24	1	8	49	72
Improved image of organisation	13	3	9	18	1	10	35	43
Increased competitiveness	11	2	7	16	1	7	25	44
Improved communications with customers	10	2	8	14	1	7	28	36
Aided development of new products/services	9	4	4	14	1	0	24	47
Increased turnover	8	2	3	13	1	2	16	44
Increased profit	8	2	3	13	1	2	16	43
Supported development of new markets	8	2	4	13	1	3	17	39
Improved productivity	8	2	5	12	1	4	17	35
Increased market share	7	0	2	12	1	1	17	38
Increased employment	4	0	1	7	1	0	6	25
Improved internal communications	4	0	2	7	1	2	8	21
Reduced costs	3	0	1	5	1	0	8	13

Design contributed to quality in

24%

of growing businesses, but only

11%

of static ones.

Market share grew through design in

7%

of UK companies and

12%

of growing ones.

Competitiveness was supported by design in

16%

of growing companies, but only

7%

of static ones.

Where design is integral,

44%

of companies see a resulting increase in competitiveness and turnover.

Design boosted profit for

13%

of growing businesses, but only

3%

of static ones.

New markets opened due to the use of design in

39%

of businesses where design is integral.

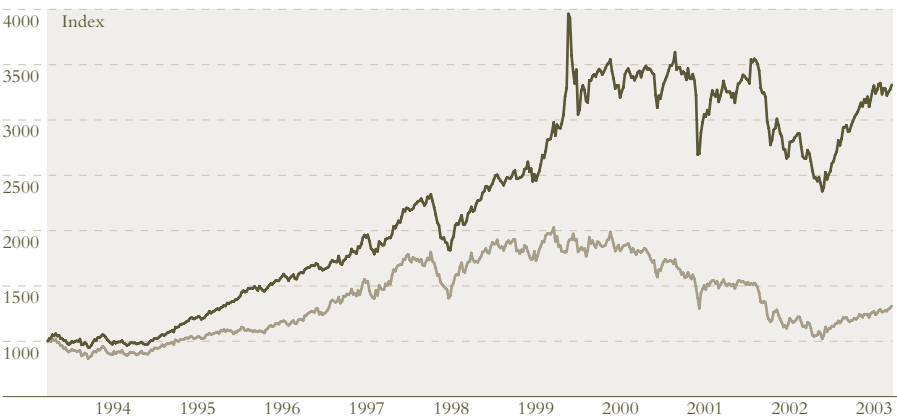
Financial rewards

Higher share prices

There's strong evidence for the first time of the direct relationship between the effective use of design and financial performance.

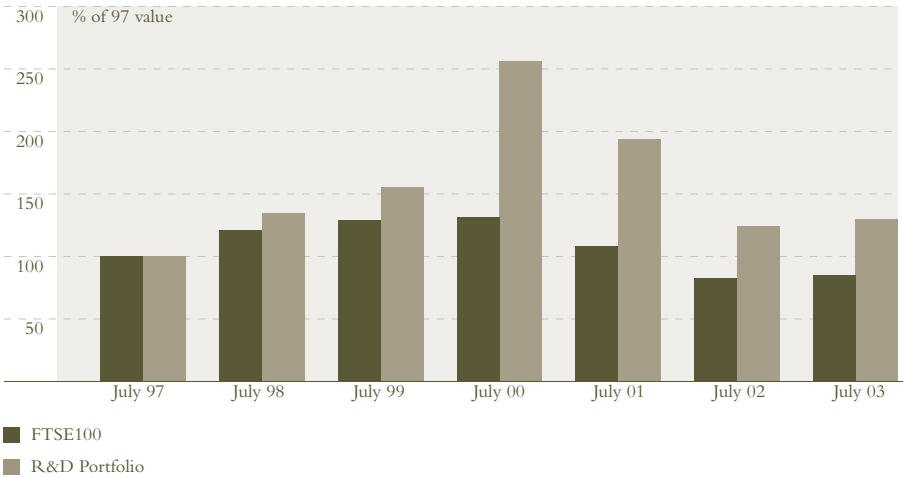
An in-depth study (Design Index) tracked a group of UK quoted companies identified as effective users of design over a ten-year period between 1994 and 2003. The study found that this group of 63 companies out-performed the FTSE 100 over the full period by 200% and surpassed their peers in the bull and bear markets.

The tracked companies are drawn from a wide range of sectors and include household names such as Barclays, Egg, Tesco, Marks & Spencer, Boots, British Airways, EasyJet, Rolls Royce, BP and Unilever.



Source: The Impact of Design on Stock Market Performance (Design Index), Design Council, 2004

These results are complemented by the findings of another study looking at the link between share price and spending on R&D. The R&D Scoreboard has tracked the share prices of the 39 FTSE 100 businesses which reinvest most heavily in R&D. The group's share price performance has outrun the FTSE 100 every year since 1997, and by July 2003 the group's combined price had risen by 30%, while the FTSE 100 had declined by 15%.



Source: The 2003 R&D Scoreboard, Department of Trade and Industry, 2003

Better return on investment

UK businesses have got more out of investing in design than they bargained for. On average, they expected a return of around 50% on their most successful design project last year, but they actually got a return of more than 75%.

Case study

Clipper

Organic tea maker Clipper bucked a decline in tea drinking and shook off its own niche status with a visual redesign positioning the company as a top-end, mainstream brand. Designers Williams Murray Hamm side-stepped the clichés of tea packaging, capturing the company's fair trade principles with simple bold type and imagery. Sales have almost quadrupled since the redesign launched in late 2001, despite Clipper not carrying out any other brand building work. Owner Mike Brehme's verdict on the redesign: 'The single most important activity we have undertaken in our 20-year history.'

Source: Design Business Association, Design Effectiveness Awards Case Studies, 2004

Sharper competitive edge

Design has been significant in driving UK businesses' competitiveness over the last ten years – more than a quarter of companies say it has become more important to them. The more successful a business is, the likelier it is to use design to drive competitiveness. Manufacturers have seen most benefit of all, with half reporting that design has sharpened their competitive edge.

Has design become more important in maintaining your competitive edge over the past 10 years?

		In the past year our turnover has			
	All companies	Got smaller	Not changed	Grown	Manufacturers
Yes	27	8	24	34	50
No	47	76	54	39	22
Don't know	26	16	22	28	28

Design is increasingly important to the competitive edge of

50%

of manufacturers.

Products, services, ideas

More new products and services

The more businesses use design, the better they are at getting new products and services to market. While just a third of companies overall have launched a new product or service in the last three years, 67% of companies who see design as integral have done so.

Have you developed any new products, services or processes in the last three years?

	All companies	Role of design in our company: No role	Limited	Significant	Integral
Yes	32	3	40	72	67
No	67	97	58	26	30

The link between design intensity and launching new products and services is clear across different sectors. For instance, three quarters of manufacturers see design as integral or significant and 63% have launched a new product or service in the last three years.

What role does design play in your business?

%	All companies	Industry sector: Primary, utilities & construction	Manufacturing	Professional business services	Retail, wholesale & leisure services
Integral or significant	28	16	76	33	21
Limited	35	18	15	39	42
None	37	66	9	28	37
Percentage who have introduced a new product, service or process in the past three years:	32	15	63	38	29

Only

32%

of UK companies have introduced a new product or service in the last three years. Where design is integral,

67%

have done so.

Case study

Aqualisa

To differentiate products from increasingly strong European competition, Kent shower manufacturer Aqualisa involved designers Seymour Powell from an early stage in developing a product that balanced user needs, commercial pressures and technology. The resulting Quartz range exceeded sales targets by 160% after launch in 2001 and the project achieved payback within a year.

Quartz showers contain electronics to control temperature and power, making it possible to locate controls anywhere and to programme the shower before getting in. Installation time is reduced from two days for a conventional shower to just a few hours. This was a direct response to user research showing that customers disliked the upheaval associated with having a shower installed.

Source: DTI Innovation Report – Competing in the Global Economy: The Innovation Challenge, Department of Trade and Industry, 2003

More big ideas

Significant innovative breakthroughs have been thin on the ground for UK businesses in the last three years. Just under one in ten companies have come up with new products, services or processes based on major innovation. But more than three times as many businesses where design is integral or significant have done so.

Have you developed any new products, services or processes involving major innovation/design in the last three years?

		Role of design in our company			
	All companies	No role	Limited	Significant	Integral
Yes	9	0	4	33	32
No	88	99	95	61	62


JAPAN OPTICS

Innovate and compete

Businesses face fierce competition from global rivals, increasing the pressure on them to compete on innovation and added value. So how are they handling the pressure?

Competing through innovation

Design-led companies choose innovation over price

The more serious a company is about using design, the likelier it is to see innovation as the best route to success, and the less it has to rely on keeping prices low. Where design plays no role in businesses, only 1% compete through innovation, while nearly half have to keep prices down to survive. Businesses where design plays an integral or significant role take a more balanced view of their competitive options.

How does your company compete?

		Role of design in our company			
	All companies	No role	Limited	Significant	Integral
Added value of product/service	58	54	65	59	52
Distribution/availability	7	1	13	1	12
Innovation	6	1	3	18	17
Price/cost	29	45	19	21	19

Case study
Almus

Generic drugs are the same no matter who sells them, so the only way brands such as newcomer Almus can stand out in a competitive market is by appealing to pharmacists through price or packaging. Almus and designers Creative Leap's research with pharmacists found that traditional all-white packaging was difficult to decipher and a potential cause of dispensing errors. The subsequent packaging design colour codes the type, amount and dose of drug in a way that is easier for pharmacists to understand. Design costs were paid back within three months of launch and Almus exceeded first-year sales targets of £10million by 300%.

Source: Design Business Association, Design Effectiveness Awards Case Studies, 2004

45%

of companies that don't use design compete mainly on price. Where design is significant, only

21%

have to compete on price.

58%

of customers buy on added value while

29%

look mainly at price.

Customers want added value

Nearly all UK businesses (96%) sell to others in the private sector and a third sell to the public sector. Suppliers report that both sets of customers make their buying decisions in broadly the same way. Added value is comfortably more important than price; innovation is not valued highly by public or private sectors.

Manufacturers feel public sector price pressure

Manufacturers are under more pressure than companies overall to deliver low prices to the public sector. More than half of manufacturers say their public sector customers are likely to buy based on cost and almost none see availability as key. In contrast, manufacturers' private sector customers are more concerned about availability and less so about cost.

On what basis do your customers make their buying decisions?

	All companies		Manufacturers	
%	Private sector customers	Public sector customers	Private sector customers	Public sector customers
Added value of product or service	60	59	44	40
Price/cost	28	25	36	54
Distribution/availability	7	10	16	1
Innovation	5	7	4	6

Manufacturers report that only

6%

of the public sector focus on innovation when buying, compared to

54%

looking mainly at cost.

Ideas are going to waste

Twenty-six percent of manufacturing companies said they had had ideas for new products, services or processes but not followed them up. The main reason was lack of time (39%) and cost or finance (39%). But surprisingly, factors like risk, low return, previous failures and lack of skill barely featured. Worryingly, 47% said nothing had prevented the ideas from being developed.

Large manufacturers most likely to abandon innovation

Half the large manufacturers questioned in the Community Innovation Survey said they had got innovation activities underway between 1998 and 2000, only to abandon them before completion. Only 26% of large service sector businesses reported doing the same. SMEs are slightly more likely not to embark on innovation activity at all. Sixty-eight per cent said they hadn't started an innovation project, compared with 51% of large businesses.

Source: Third UK Community Innovation Survey (CIS3), Department of Trade and Industry, 2003

Innovative brands do best

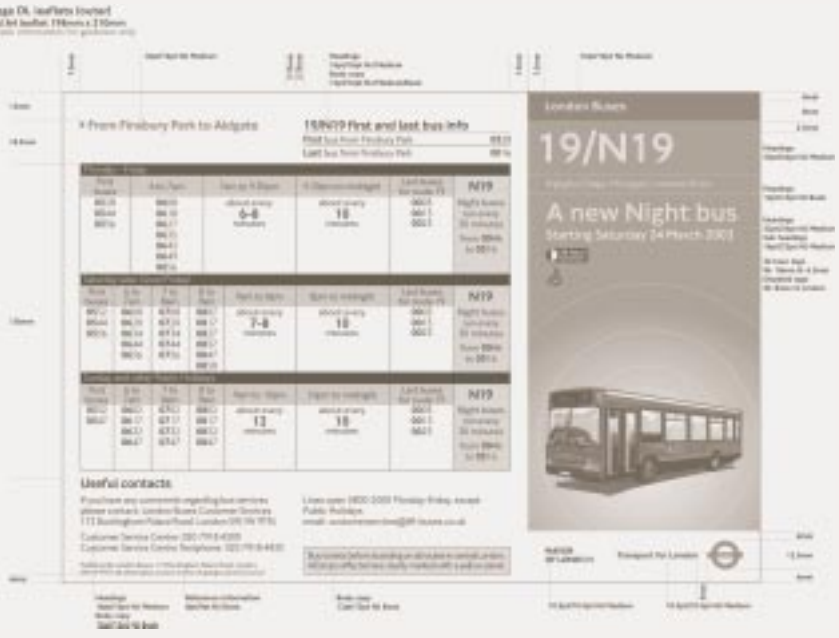
Businesses known for continuous innovation are the star performers in a major annual survey of global brands. Apple was the biggest mover in the annual rankings prepared by brand consultancy Interbrand, which rate brands' monetary value. The business saw its brand value go up by 24% as it leapt ahead of the likes of Nintendo, Volkswagen and MTV. Meanwhile Amazon, Yahoo!, Samsung and HSBC all recorded rises in value of at least 15%.

Source: Best Global Brands, Business Week & Interbrand, 2004

Case study
Transport for London

Five and a half million people use London buses every day – 19% more than four years ago. One of the keys to keeping services popular is clearly communicated information about changes and improvements, of which Transport for London makes around five per week. Design consultancy Creator's solution provides route and service frequency details, dates of changes and linear route maps through a handy leaflet that 65% of passengers find easier to read, understand and use. And it is saving Transport for London £225,000 per year by halving artwork costs and cutting print costs by 26%.

Source: Design Business Association, Design Effectiveness Awards Case Studies, 2004



Ingredients of success

Design matters more to fast-growing companies

The UK's most successful businesses rate design as the second most important factor for success, with only marketing judged to be more significant. UK companies as a whole rate financial management as the number one factor for success, with design rated as seventh most important.

In the past year our turnover has	Rank the key ingredients of business success 1	2	3	4
All companies	Financial management	Marketing	Operational management	Education and training
Grown rapidly	Marketing	Design	Financial management	Innovation; Creativity
Grown moderately	Financial management	Operational management	Marketing	Communication
Not changed	Financial management	Marketing	Operational management	Innovation
Got smaller	Financial management	Human resource management; Innovation		Education and training

Design is the

2nd

most important ingredient of success for rapidly growing businesses. It is the

7th

most important for companies overall.

Understanding customers – the route to growth

Understanding customers is at the heart of good design processes and it's also how nearly all fast-growing companies get ideas. Rapidly growing companies also beat the rest at generating ideas internally and learning from the competition. Manufacturers are much more likely than businesses in general to see customers and suppliers as a key source of ideas and much less likely to follow competitors. Surprisingly, retail, leisure and wholesale businesses are much less likely than manufacturers to listen to customers.

What are your main sources for ideas to improve or change your business?

	In the past year our turnover has						
	All companies	Got smaller	Not changed	Grown moderately	Grown rapidly	Manufacturing	Retail, wholesale and leisure
Customers	60	81	56	58	97	81	57
Internal discussions with staff/management	32	14	28	40	55	28	36
Suppliers	19	16	17	24	20	36	18
Other	14	10	13	15	4	13	12
Competitors' actions/ plans	11	3	7	16	35	9	11

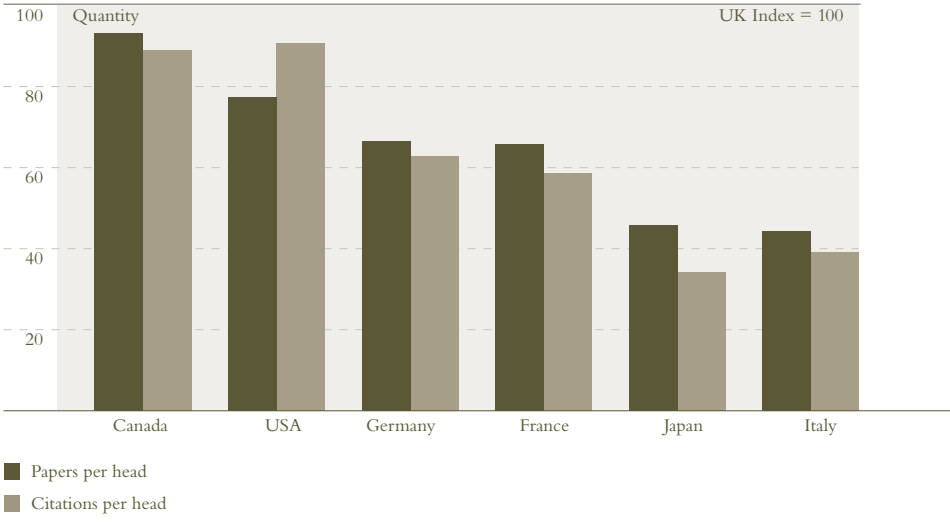
97%

of rapidly growing companies get ideas by understanding their customers.

RD&D: Research, Design and Development

UK leads in knowledge generation, but lags in R&D

The UK leads the world in generating scientific knowledge, according to the DTI. The UK has 1% of the world's population, but undertakes 5% of the world's science, producing 8% of all papers and having 9% of citations – more per head of population than any other G7 country.



Source: DTI Strategy: Prosperity for All, Department of Trade and Industry, 2003

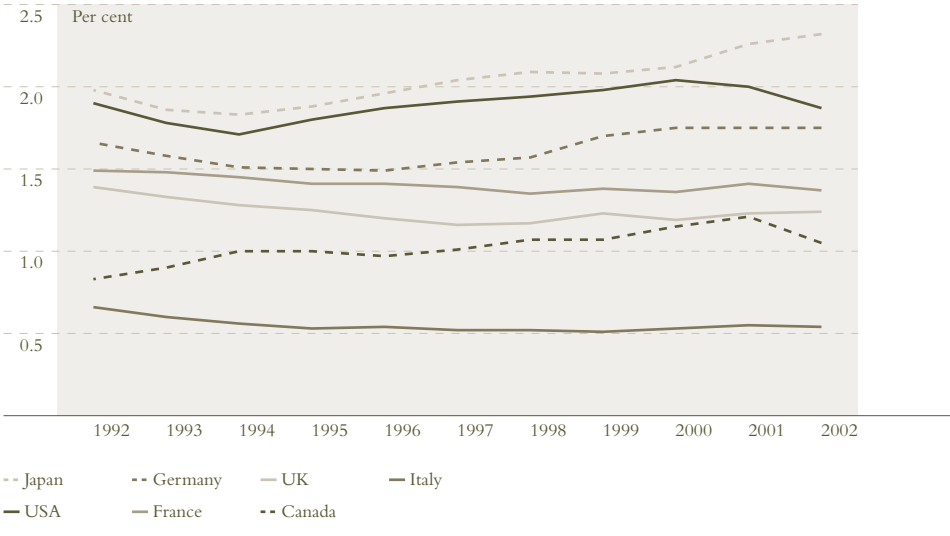
Global competitors are spending more on R&D as a proportion of sales (R&D intensity) than the UK – and the gap is getting wider. The UK reduced spending slightly against a global background of falling sales, but many competitors made increases.

%	R&D intensity
UK	2.5%
Europe	3.7%
France	3.1%
Germany	4.6%
USA	5.2%
Japan	4.3%

The UK's R&D intensity in the pharmaceuticals and biotechnology and aerospace sectors is world-leading, but investment by other sectors such as electronics, software, engineering and telecoms is notably lower than other countries.

Source: The 2003 R&D Scoreboard, Department of Trade and Industry, 2003

The UK was spending less of its GDP on R&D in 2002 than it did a decade earlier, but the USA increased its spending over the same ten years. The USA spent 1.87% of GDP on R&D in 2002 compared to 1.9% in 1992, while the UK spent 1.24% in 2002 – down from 1.39% in 1992. There has, nevertheless, been a steady increase in the UK's R&D spending since 1997, when the proportion of GDP was 1.16%.



Source: DTI Innovation Report – Competing in the Global Economy: The Innovation Challenge, Department of Trade and Industry, 2003

The Community Innovation Survey shows a relationship between collaboration with universities and successful innovation. Of firms that had obtained knowledge from universities, 62% had gone on to introduce a product or process innovation between 1998 and 2000. This compares to innovation by 30% of those who had not obtained knowledge from universities.

Source: "Knowledge Transfer, Business-University Co-operation and Innovation Performance: Regional Analysis of CIS 3", M Frenz, J Michie and C Oughton, 2004

Few companies benefit from R&D tax credits

Very few companies with turnover under £1million know that tax credits are available for R&D, compared to 10% of businesses as a whole. As a result, the take-up of credits by businesses with turnover less than £1million is just 2%. This rises to 7% for companies with sales between £1million and £5million. Encouragingly, 30% of manufacturers know of these credits, although only 5% have used them to support their R&D.

%	Do you know that Research & Development tax credits are available for SMEs? Yes	No	Don't know	Has your firm used Research & Development tax credits? Yes	No	Don't know
All companies	10	74	16	2	71	27
Manufacturers	30	70	4	5	82	13

Less than

1/5th

of companies that know about R&D tax credits have actually used them.

Businesses which use design the most get the biggest benefits. So what do companies think design is for and how does it fit into their processes for developing new products and services?

Role of design

Design is vital to growing companies

A third of growing companies see design as integral or significant to their business, compared to only 11% of shrinking companies.

What role does design play in your business?

		In the past year our turnover has		
%	All companies	Got smaller	Not changed	Grown
Integral or significant	28	11	22	33
Limited	35	20	24	47
None	37	69	54	19

Design is integral or significant to

33%

of growing companies, but to only

11%

of shrinking ones.

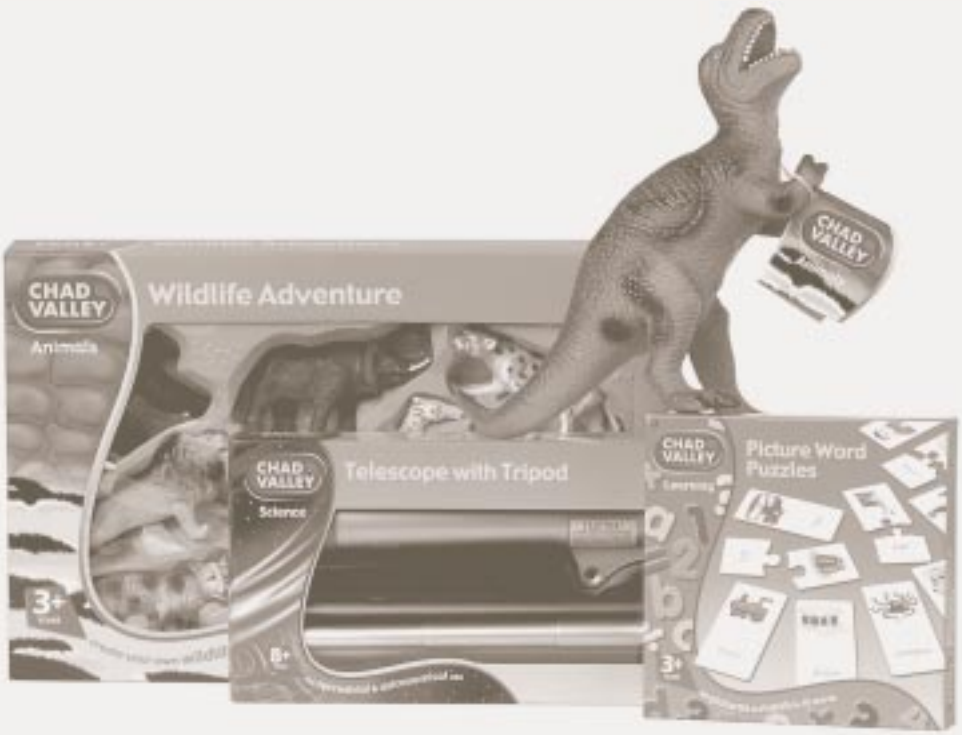
Growing companies use design strategically to exploit innovation

While most companies use design to develop new products and services and shape the appearance of products, half use design much more comprehensively as a creative process that takes innovation to the marketplace. One third give the design process a strategic place in their business. Growing companies are much more likely to use design to bring ideas to life and to use the process strategically.

Case study
Chad Valley

Chad Valley saw the chance to make products stand out on ever more crowded toy store shelves by using design to create a strong, graphic house style to unify its extensive and expanding range. Packaging designed by Carter Wong Tomlin made it easier for customers to identify different products and their target age groups, while building the brand's quality and value positioning. Without extra advertising or promotional spend, Chad Valley's sales rose by 21.4% year-on-year after the redesign, which also contributed towards a 40% cut in production and packaging costs and made further expansion of the range possible.

Source: Design Council case study/DBA Design Effectiveness Awards 2003



In my company design is...

%	All companies	In the past year our turnover has: Not changed	Grown moderately	Grown rapidly	Manufacturers
…used to develop new products and services	75	68	80	83	71
…about how products look	74	65	82	60	54
…about products working well to meet client needs	64	47	78	66	65
…a creative process that enables ideas to come to life	50	35	59	74	58
…used to produce something that will sell	47	32	54	80	64
…a strategic business tool	34	23	36	40	24

1/3rd

of UK companies use design as part of strategy development. Design brings ideas to life in

50%

of businesses.

Product and service development

Manufacturers make most use of design throughout new product and service development

More than six out of ten companies do not include design or designers in their product or service development processes. But four out of ten manufacturers use them at all stages, while 63% use a design manager or team to guide the process.

Case study
Marks & Spencer

Sales of Marks & Spencer's hand-held travel fan more than doubled after it was redesigned by consultancy Smallfry. M&S had previously sourced the product from external suppliers, but decided it needed more control over function and aesthetics to boost sales. Smallfry increased on-shelf appeal through sleeker mobile phone-like casing that made the fan capable of standing unaided. The design gave users real benefits which the product itself had to communicate clearly, as it was sold without packaging. It took just 12 days to recoup development costs after launch in December 2003 and a second set of tooling had to be commissioned to keep up with a sales volume increase of 105% compared to the previous product.

Source: Design Business Association, Design Effectiveness Awards Case Studies, 2004

How is design used in new product or service development?

	All companies	In the past year our turnover has: Not changed	Grown moderately	Grown rapidly	Manufacturing	Retail, wholesale and leisure services
Design/designers are used at all stages	15	12	15	38	41	5
Design manager or team leads and guides whole process	14	5	12	27	63	13
Design/designers are used in some specific stages	14	64	47	78	66	65
Design/designers are not included in the process	63	50	35	59	74	58

Manufacturers make most use of designers in concept development

Manufacturers significantly out-perform all other sectors in their use of design in product and service development.

If you involve designers in product or service development, at which stages do you do so?

	All companies	Industry sector: Manufacturing	Retail, wholesale and leisure services	Professional business services	Primary, utilities and construction
Concept development	25	72	23	14	40
Prototyping and detailed specification	25	65	23	13	45
Pilot manufacturing/ delivery of product or services	22	51	21	12	39
Implementation	22	50	21	14	37
Idea generation, research, R&D	20	60	21	9	28
Marketing and distribution	12	23	12	8	32

Role of designers

More growth, more designers

Growing companies employ more designers than companies as a whole and they also generally make more use of external design consultants.

%		All companies	In the past year our turnover has: Got smaller	Not changed	Grown moderately	Grown rapidly
Have you used designers from outside the company in the last year?	Yes	20	3	19	24	28
	No	76	88	79	72	69
How many designers do you employ? (Average)		4.7	2.2	2.9	7.4	5.4

%	All companies	Number of employees: 1-19	20-49	50-249	250+
How many designers do you employ? (Average)	4.7	1.9	4.6	8.1	37.9

Growing companies employ more designers and use more external design consultancy.

What projects do designers work on?

	Total	Industry sector: Primary, utilities and construction	Manufacturing	Professional business services	Retail, wholesale and leisure services
Communications, branding and graphics	71	55	60	93	61
Interiors	22	0	20	25	22
Architecture/landscape	21	39	19	27	17
New product development, industrial design	16	15	39	18	12
Packaging design	9	11	18	5	9
Engineering design	6	10	7	3	8
Service design	4	8	15	4	1

60%

of manufacturers have worked with designers on communications and graphics,

39%

on new product development and

15%

on designing services.

External design advice

What are your main reasons for not using more external design expertise?

	All companies	Industry sector			
		Primary, utilities and construction	Manufacturing	Professional business services	Retail, wholesale and leisure services
Use external designers/ advisers when required	71	55	60	93	61
Already have in-house skills	22	0	20	25	22
Not relevant to our business	21	39	19	27	17
Too expensive	16	15	39	18	12
High cost and low return	9	11	18	5	9
Difficult to find appropriate service or advice	6	10	7	3	8

Would you be more likely to use more external design expertise if advisors were professionally accredited or chartered?

Yes	11%
No	76%
Not sure	13%

11%

of companies would be more likely to use designers if they were professionally accredited.

Measuring design investment

More growing companies invest in design

Only a third of UK businesses as a whole invest in design, compared to 52% of manufacturers.

Does your company spend money on design?

		In the past year our turnover has			
	All companies	Got smaller	Not changed	Grown	Manufacturing
Yes	33	15	26	39	52
No	65	84	73	58	47

Only 3% of companies that invest in design are clear that they have an accounting mechanism to measure the return on their investment – 41% are not sure!

If you invest in design, do you have an accounting mechanism to measure the return on investment?

		In the past year our turnover has			
	All companies	Got smaller	Not changed	Grown moderately	Grown rapidly
Yes	3	0	5	1	13
No	57	25	47	61	31
Don't know	41	75	49	38	56

57%

of companies that invest in design have no accounting mechanism to measure the return on their investment.

Research sources

Unless stated otherwise, all the statistical information presented in Design in Britain is drawn from the Design Council's National Survey of Firms, commissioned through PACEC in 2004. Other sources are referenced below:

The Impact of Design on Stock Market Performance, Design Council, 2004

DTI Strategy – Prosperity for All, Department of Trade and Industry, 2003

The 2003 R&D Scoreboard, Department of Trade and Industry, 2003

DTI Innovation Report – Competing in the Global Economy: The Innovation Challenge, Department of Trade and Industry, 2003

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Best Global Brands, Business Week and Interbrand, 2004

Detailed Results from the Third UK Community Innovation Survey (CIS3), Department of Trade and Industry, 2004

Design Business Association, Design Effectiveness Awards Case Studies, 2004

Research methodology and definitions

The National Survey of Firms is one of the UK's largest annual business surveys and is the most comprehensive investigation into the ways UK businesses understand, use and benefit from design.

Since the research started in 2000, the methodology has been consistent. The sample size was increased for the 2004 study to allow more detailed analysis of the results. The survey is based on 1,500 telephone interviews conducted with chief executives or heads of design in UK companies of all sizes and sectors. The research is undertaken by an independent company, Public and Corporate Economic Consultants (PACEC).

The research does not attempt to impose a definition of 'design' or 'designer', since a key objective is to explore how firms perceive these terms.

Size and sector quotas are applied to ensure that the sample is representative of the wider population of firms and the results are re-weighted to correct for any sample bias. This means that the published data is statistically representative of the result that would be achieved from a census of the entire population of firms in the UK. The research uses a four-way classification of UK industry. The table below provides further detail as to the types of businesses included within each sector.

Primary, utilities and construction	Agriculture, forestry and fishing, mining and quarrying, electricity, gas and water supply, sewage, refuse disposal and sanitation, building, transport, storage and communication
Manufacturing	Fuel processing and production, manufacture of chemicals and man-made fibres, metal goods, engineering and vehicles industries, other manufacturing industries
Professional business services	Banking, finance and insurance, real estate, renting and business activities
Retail, wholesale and leisure services	Wholesale and retail trade, personal and household goods, hotels and restaurants, other community, social and personal service activities

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