

Article

# Services sector, UK: 2008 to 2018

Changes that have taken place in the UK services sector from 2008 to 2018. The differences between public sector-dominated sections and the rest of the sector, and the individual sections of the services sector, are analysed in depth.

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# 1 . Main points

- The services sector fell during the 2008 recession, down 4.4% on its Quarter 1 (Jan to Mar) 2008 level in Quarter 2 (Apr to June) 2009; however, the sector has grown steadily since the start of 2010, with an average quarter-on-quarter growth of 0.5% from Quarter 1 (Jan to Mar) 2010 to Quarter 4 (Oct to Dec) 2018.
- There were large rises in 6 of the 14 sections; the largest contributors were the scientific, professional and technical services section, which added 4.1 percentage points, and the real estate section, which added 3.7 percentage points.
- There were substantial falls over the period in 2 out of the 14 sections; these were the financial and insurance services section, which reduced its contribution by 1.7 percentage points, and the public administration and defence sector, which reduced its contribution by 1.5 percentage points.
- Public sector-dominated industries behave differently; they helped to flatten the recession but have been growing slower than the services average since 2010.

## 2 . Introduction

The purpose of this article is to look at the changes that the services sector has undergone during and following the 2008 recession.

The analysis in this article is based on data as published in the [Index of Services](#), which is sourced from the Monthly Business Survey (MBS) and [a variety of other data](#). The MBS covers approximately 26,000 businesses across the services sector. Industry-level data follows the two-digit number descriptions within [the UK Standard Industrial Classification 2007: SIC 2007](#). A table of SIC codes and industry descriptions is included in the appendix to this article. The industries are then grouped to form 14 sections denoted by letters. However, it can often be more helpful to consider industries at a lower level of aggregation. This can be supplied on an historical basis by the Annual Business Survey, which has a larger sample of some 62,000 businesses across the entire UK economy.

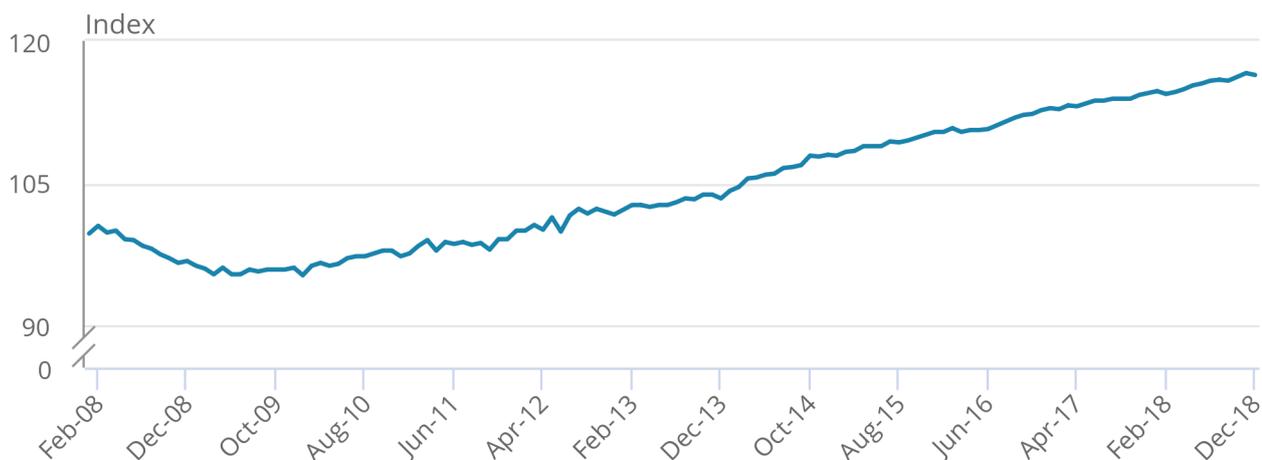
The services sector makes up approximately 80% of UK gross domestic product (GDP) and has recovered strongly from the 2008 recession, with the index of services now 16.4% above its value at the start of 2008. The average year-on-year growth rate from financial year ending (FYE) 2008 to FYE 2018 was 1.6%, making it the best-performing sector of the UK economy over that period, compared with growth rates of negative 0.5% and positive 1.3% for the production and construction sectors.

**Figure 1: The Index of Services has grown substantially past its pre-downturn peak**

Seasonally adjusted, January 2008 to December 2018. Index (2008 Quarter 1 = 100)

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Seasonally adjusted, January 2008 to December 2018. Index (2008 Quarter 1 = 100)



Source: Office for National Statistics - Index of Services

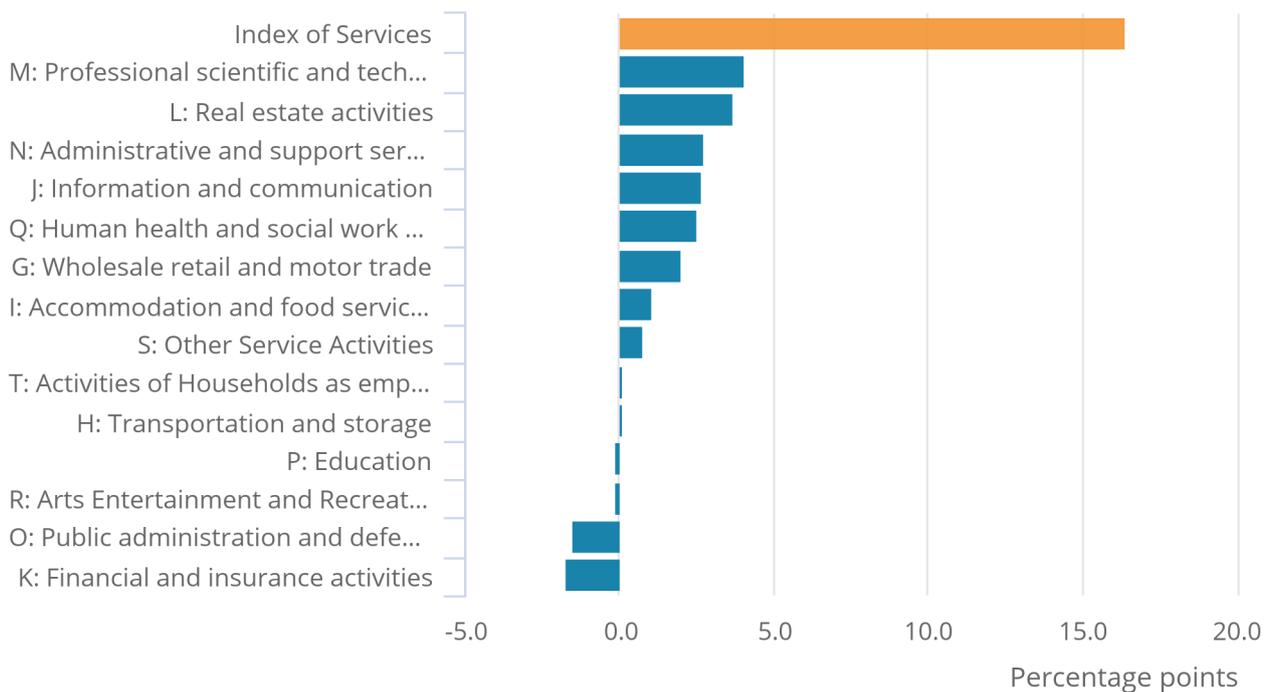
Though the services sector has been in a period of consistent, steady growth since 2010, there is substantial divergence in the performance of the sections that form the sector. The contributions to headline services growth from Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) for each services section is shown in Figure 2.

**Figure 2: The Index of Services grew by 16.4% with six sections making substantial contributions**

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018

Figure 2: The Index of Services grew by 16.4% with six sections making substantial contributions

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018



Source: Office for National Statistics - Index of Services

Notes:

- Contributions are percentage changes in the Index of Services.
- Contributions may not sum exactly due to rounding.

Figure 2 shows a wide base of strength, with six sections contributing 2.0 percentage points or more of growth to the Index of Services. Scientific, professional and technical activities (M) and real estate activities (L) were particularly strong, contributing 4.1 and 3.7 percentage points of growth each. There were just two sections with substantial negative contributions: financial and insurance activities (K) and public administration and defence (O), which contributed negative 1.7 and 1.5 percentage points respectively.

In the rest of this article, a more detailed look is taken at each of the sections within services.

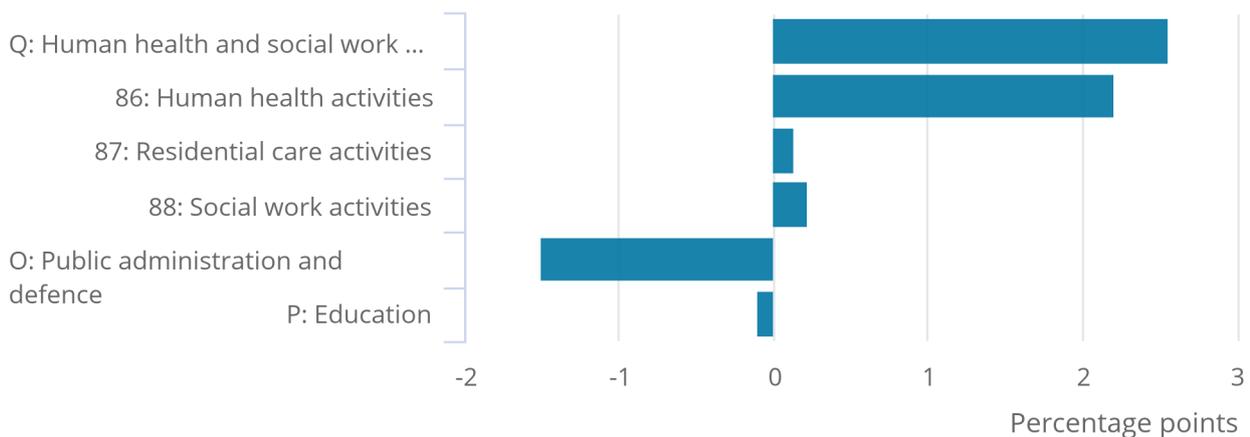
### 3 . Public service-dominated industries

**Figure 3: Human health and social work activities was the only public sector-dominated section to increase its contribution to headline services**

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018

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Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018



Source: Office for National Statistics

Notes:

1. Contributions are percentage changes in the Index of Services.
2. Contributions may not sum exactly due to rounding.

Public administration and defence (O), education (P) and human health and social work activities (Q) have been grouped together in this section as they are public sector-dominated areas of the economy. Only human health and social work (Q) is formed of more than one sub-industry.

Public administration and defence (O) is the only section of the three to be below its level at the start of the decade, 12.8% lower and with its contribution to headline services reduced by 1.5 percentage points. This fall is reflected in reduced staff numbers in the civil service and local government. Our figures show that the total number of full-time Civil Servant employees in 2018 was [20% lower than in 2008](#). The section has performed better in recent years, its average quarter-on-quarter growth rate from Quarter 1 (Jan to Mar) 2017 to Quarter 4 (Oct to Dec) 2018 was 0.16%, an improvement from the average of negative 0.33% between Quarter 1 and Quarter 4 2017.

The education section (P) remains close to its level at the start of 2008 with its Index of Services contribution having decreased by 0.1 percentage points. The higher education industry has been a strong performer, increasing turnover by 131% between 2008 and 2017 according to the Annual Business Survey. Higher education has seen substantial changes in the way that it is funded through changes to tuition fees.

The human health and social work sector (Q) had the biggest increase in contribution of the public sector-dominated sectors, growing by 25% and increasing its headline services contribution by 2.6 percentage points. Human health activities accounts for some 74% of output and was the primary driver of growth in the sector, with a contribution of 2.2 percentage points making it the second-best-performing industry across the services sector over the decade.

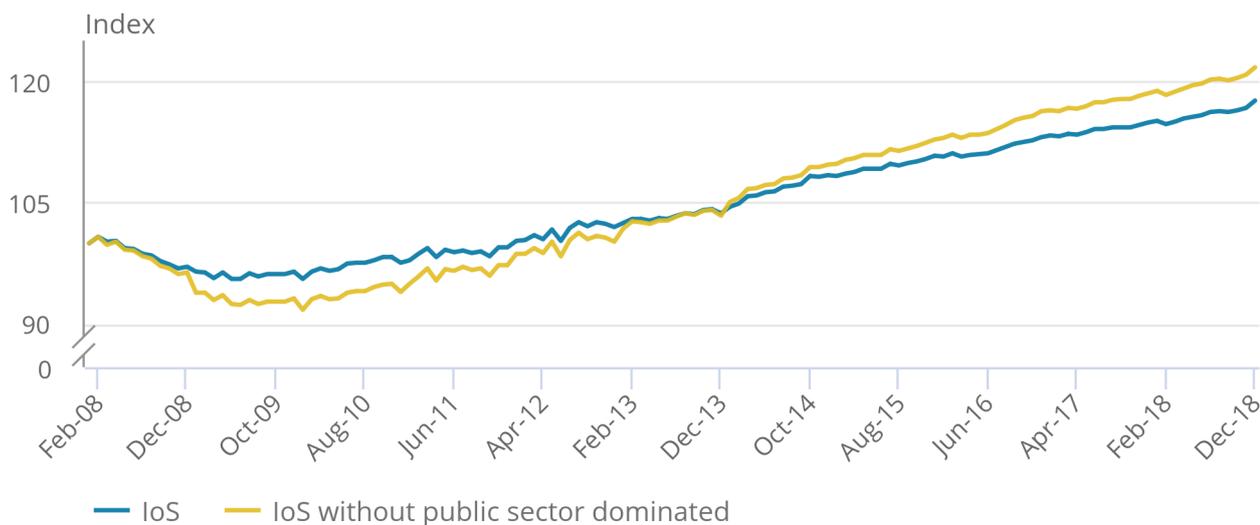
Figure 4 shows the impact of removing these industries from the services sector.

**Figure 4: The public sector-dominated industries cushioned the services sector during the recession but then grew at a slower rate**

Seasonally adjusted, January 2008 to December 2018. Index (2008 Quarter 1 = 100)

Figure 4: The public sector-dominated industries cushioned the services sector during the recession but then grew at a slower rate

Seasonally adjusted, January 2008 to December 2018. Index (2008 Quarter 1 = 100)



Source: Office for National Statistics

The differences between the services sector with and without public sector-dominated industries are clear. The effect of the public sector-dominated industries was to cushion the services sector during the recession, moderating its decline. However, as the sector came out of the recession period the growth of the public sector-dominated industries was slower than the growth of the rest of the sector. This was the case for all three sectors that each had average quarter-on-quarter growth rates lower than the Index of Services from Quarter 1 2010 to Quarter 4 2018.

Growth in these three sectors has remained slow in recent years. Between Quarter 1 2017 and Quarter 4 2018, the average quarter-on-quarter growth of sectors O, P and Q were 0.16%, 0.10% and 0.09% respectively.

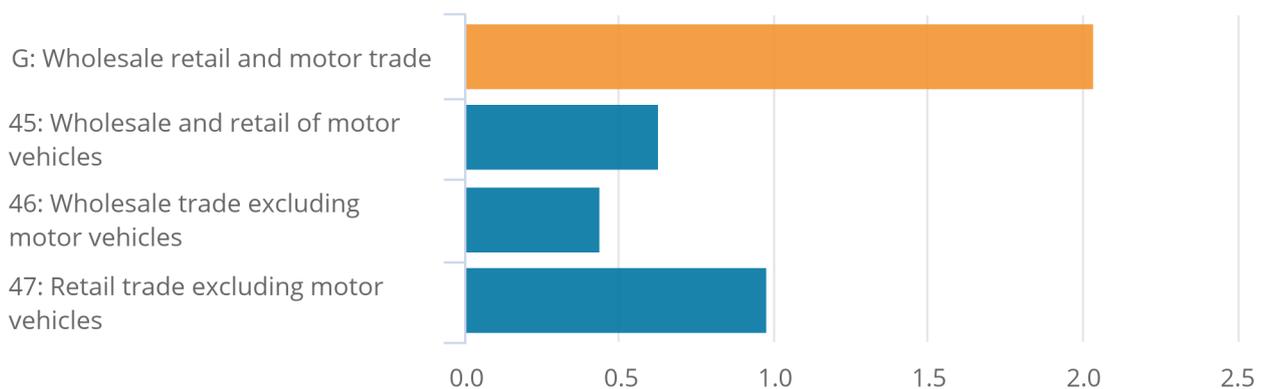
## 4 . Wholesale and retail trade including repair of motor vehicles

**Figure 5: The wholesale, retail and motor trade section increased its contribution by 2.04 percentage points**

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018

Figure 5: The wholesale, retail and motor trade section increased its contribution by 2.04 percentage points

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018



**Source: Office for National Statistics**

**Notes:**

1. Contributions are percentage changes in the Index of Services.
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The wholesale, retail and motor trade sector grew strongly between Quarter 1 (Jan to Mar) 2008 and Quarter 4 (Oct to Dec) 2018, increasing by 20.5% and adding 2.0 percentage points to its Index of Services contribution. This growth came from strength across the sector.

The motor trade industry recovered strongly after the recession and by Quarter 2 (Apr to June) 2016 was 30% above its value at the start of the decade.

There is a strong link between the motor trade industry and the manufacture of motor vehicles, though the impact of imported vehicles can give rise to differing growth profiles. Both industries have performed poorly since Quarter 2 2016, with average quarter-on-quarter growth to Quarter 4 2018, a negative 0.2% for the motor trade industry. This is due to changes in Vehicle Excise Duty, new emissions tests in the form of the worldwide harmonised light vehicle test procedure, and a general fall in consumer demand since mid-2016. These falls were reflected in the manufacturing numbers from the Society of Motor Manufacturers and Traders, which found that [motor vehicle manufacturing fell by 12% from 2016 to 2018](#). Despite this, the industry increased its contribution to top-level services by 0.6 percentage points.

In a similar vein, wholesale trade and retail trade have a strong relationship. The wholesale trade industry (46) grew by 18% and the retail trade industry (47) grew by 19% between Quarter 1 2008 and Quarter 4 2018.

The wholesale and retail trade industries performed particularly strongly between Quarter 2 2016 and Quarter 4 2018, with average quarter-on-quarter growths of 1.2% and 0.7%. This is substantially higher than their averages across the decade of 0.3% and 0.4% respectively.

One substantial change that took place within the retail industry has been the growth in online sales. [Internet retail sales on average accounted for just 4.9% of total retail sales in 2008, by 2018 this had risen to 17.9%](#). This reflects a trend across the sector with technology becoming increasingly important over the decade.

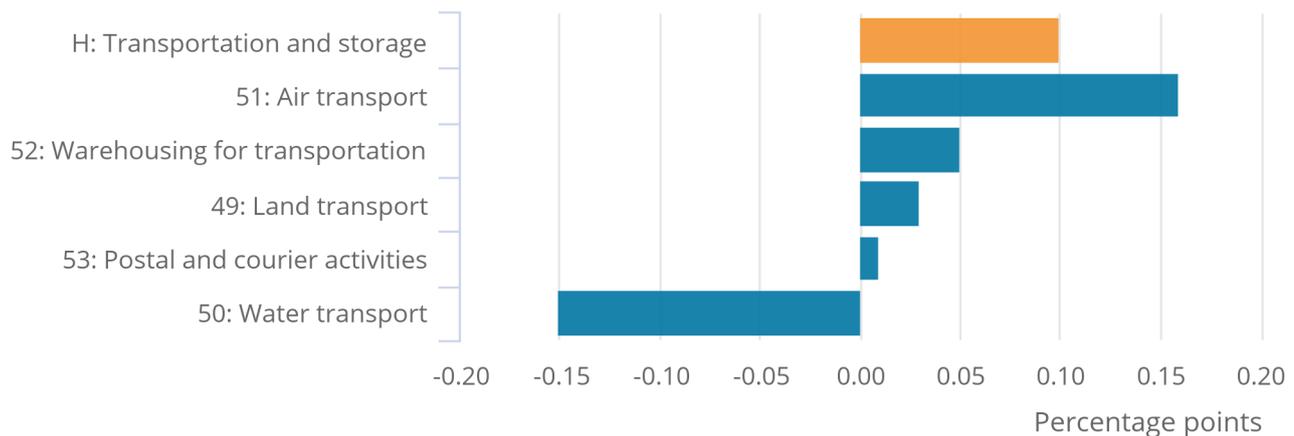
## 5 . Transportation and storage

**Figure 6: The transport and storage section increased its contribution by 0.1 percentage points**

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018

### Figure 6: The transport and storage section increased its contribution by 0.1 percentage points

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018



**Source: Office for National Statistics**

**Notes:**

1. Contributions are percentage changes in the Index of Services.
2. Contributions may not sum exactly due to rounding.

The transportation and storage sector remains close to its Quarter 1 (Jan to Mar) 2008 level in Quarter 4 (Oct to Dec) 2018, finishing the decade at 0.9% growth between the two time periods, with an increase in contribution to the Index of Services of 0.1 percentage points. The industries that have dominated the contribution changes in the section over the decade are 50, water transport, and 51, air transport. These accounted for only 8% and 11% of the sector respectively in 2018, but with varying stories on consumer demand.

Data for air transport are supplied by the Civil Aviation Authority. These data show that growth has come from a 46% increase in international passenger flights while domestic passenger flights and freight transport fell slightly. Data for water transport are through administrative sources, with data from the Department of Transport highlighting a 14% fall in sea passengers.

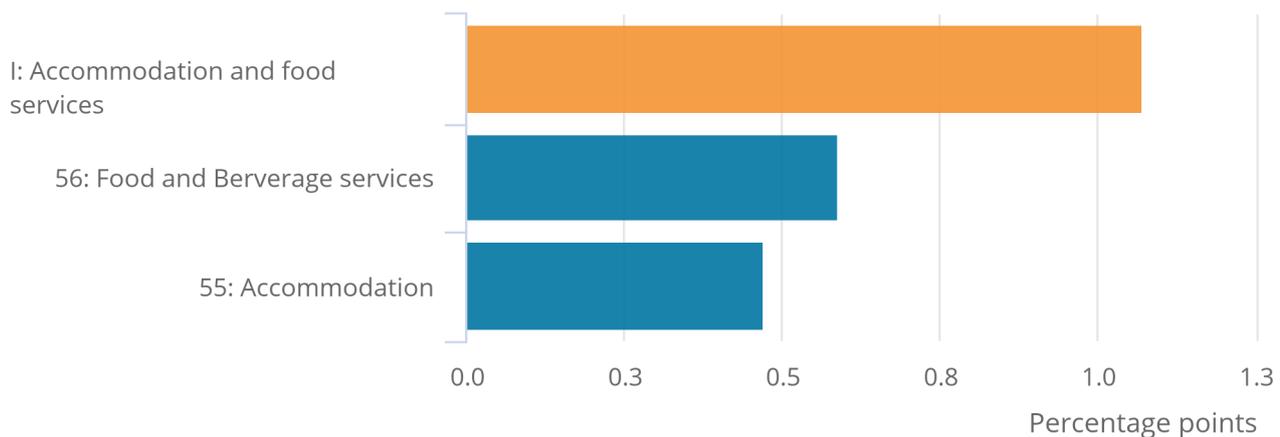
## 6 . Accommodation and food service activities

**Figure 7: The accommodation and food services section increased its contribution by 1.07 percentage points**

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018

Figure 7: The accommodation and food services section increased its contribution by 1.07 percentage points

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018



**Source: Office for National Statistics**

**Notes:**

1. Contributions are percentage changes" to "Contributions are percentage changes in the Index of Services.
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The accommodation and food service sector grew by 13% between Quarter 1 (Jan to Mar) 2008 and Quarter 4 (Oct to Dec) 2018 and increased its contribution to top-level services by 1.1 percentage points over the decade. The sector's growth was slightly below average; its average quarter-on-quarter growth over the decade was 0.31% compared with the Index of Services' 0.36%.

The accommodation industry grew by 37.5% over the decade. This growth was driven in part by an increase in tourists visiting Britain; our overseas travel and tourism data show that the number of visits to the UK by overseas residents was 23% higher in 2017 than in 2008. It is not only overseas visitors that are holidaying in the UK; Visit Britain found that Britons took [17% more domestic holiday trips in 2018](#) than in 2008 as "staycations" rose in popularity.

The food and beverage industry had a much smaller growth of 4.3% over the decade, less than the 6.8% increase in UK population. This performance is in part reflected by [the decline of pubs](#).

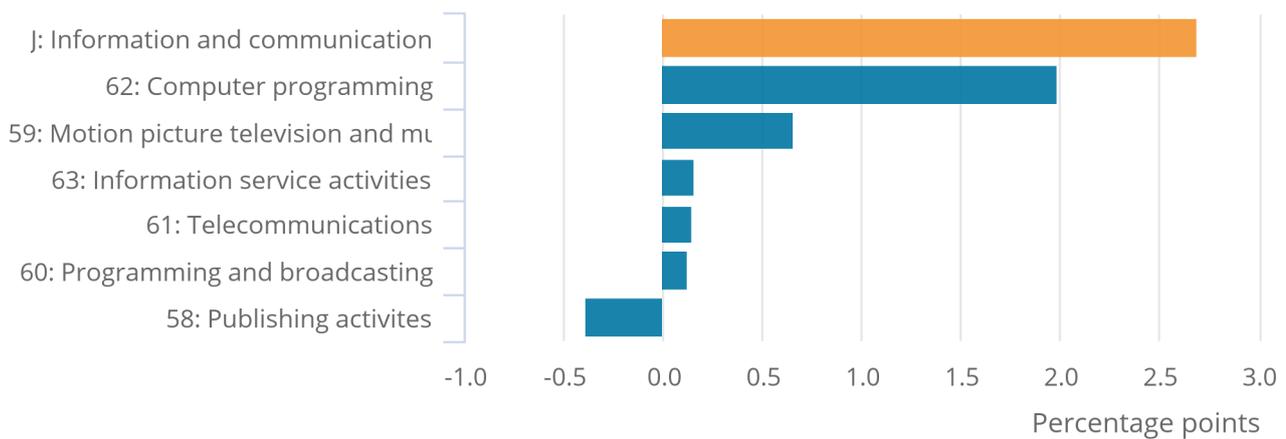
## 7 . Information and communication

**Figure 8: The information and communication section increased its contribution by 2.69 percentage points**

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018

### Figure 8: The information and communication section increased its contribution by 2.69 percentage points

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018



**Source: Office for National Statistics**

**Notes:**

1. Contributions are percentage changes in the Index of Services.
2. Contributions may not sum exactly due to rounding.

The information and communication sector grew by 41% between Quarter 1 (Jan to Mar) 2008 and Quarter 4 (Oct to Dec) 2018 and increased its contribution to the Index of Services by 2.7 percentage points. Its growth was dominated by two industries: computer programming, consultancy and related activities; and the motion picture, television and music publishing industry.

By weight, the computer programming and consultancy industry makes up 40% of the sector. The industry grew by 79% over the decade, a growth that meant it increased its Index of Services contribution by 2.0 percentage points, making it the second-best-performing services industry over the decade.

The motion picture industry was the only other industry to contribute substantially to the sector's growth. The industry grew by 101% between Quarter 1 2008 and Quarter 4 2018, the largest growth of any services industry. It also added 0.7 percentage points to its contribution to the Index of Services. The industry has performed particularly well since the start of 2015, with average quarter-on-quarter growth of 3.6% between Quarter 1 2015 and Quarter 4 2018. This high growth since 2015 may be related to changes to [Film Tax Relief](#) on 1 April 2015. Figures from HM Revenue and Customs showed that there was a large increase in the amount of tax relief paid from 2015 onwards. The [motion picture industry](#) has been looked at in more detail in [our recent ONS article](#).

The only industry to decrease its contribution to the Index of Services was publishing activities, which shrunk by 24% over the decade and decreased its contribution to top-level services by 0.4 percentage points. The two sub-industries within publishing activities have performed very differently. Publishing of books and periodicals, which makes up 86% of the sector, had 5.8% lower turnover in 2017 than in 2008 according to the Annual Business Survey (ABS). In contrast, software publishing experienced a turnover rise of 110% in the same time period. The strength of software publishing may simply reflect the ever-increasing usage of computers and other electronic equipment.

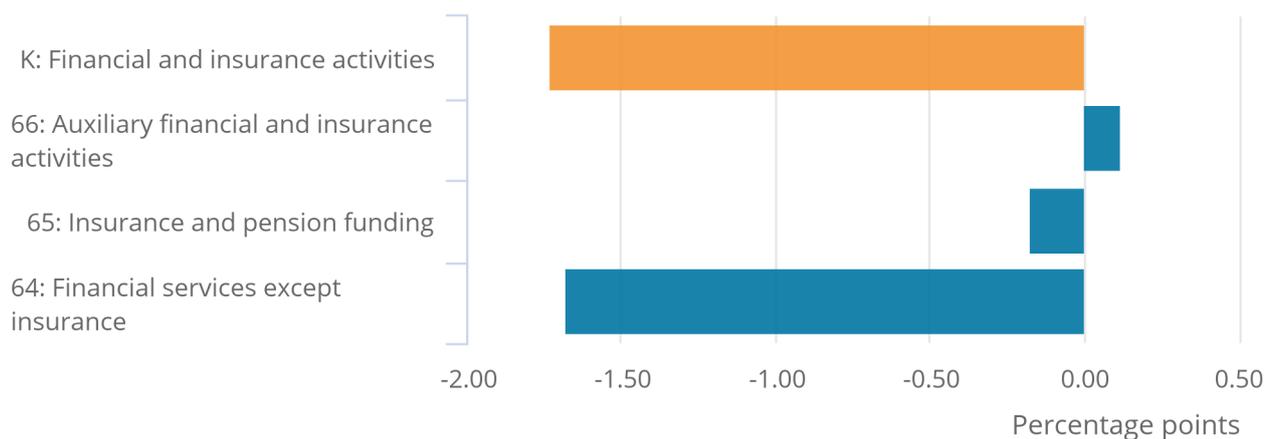
## 8 . Financial and insurance activities

**Figure 9: The financial and insurance activities section decreased its contribution by 1.73 percentage points**

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018

Figure 9: The financial and insurance activities section decreased its contribution by 1.73 percentage points

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018



**Source: Office for National Statistics**

**Notes:**

1. Contributions are percentage changes in the Index of Services.
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The financial and insurance activities sector was the worst-performing services sector over the decade between Quarter 1 (Jan to Mar) 2008 and Quarter 4 (Oct to Dec) 2018, declining by 10% and decreasing its Index of Services contribution by 1.7 percentage points. The sector's weak performance contrasts with its strength in the preceding decade: between Quarter 1 (Jan to Mar) 1997 and Quarter 4 (Oct to Dec) 2007, the average quarter-on-quarter growth for the sector was 1.6%; between Quarter 1 2008 and Quarter 4 2018 this fell to negative 0.3%. There has been no change in the sector's performance more recently, with the average quarter-on-quarter growth rate remaining negative 0.3% between Quarter 1 2017 and Quarter 4 2018.

The sector is composed of three industries, of which financial service activities is the largest, forming 59% of the sector. The financial service industry was responsible for the sector's worsening performance between this decade and the previous one. The two other industries in the sector had a higher average quarter-on-quarter growth rate from Quarter 1 2008 to Quarter 4 2018 than from Quarter 1 1997 to Quarter 4 2007. In contrast, the financial service industry saw a drop from 2.4% to negative 0.3%.

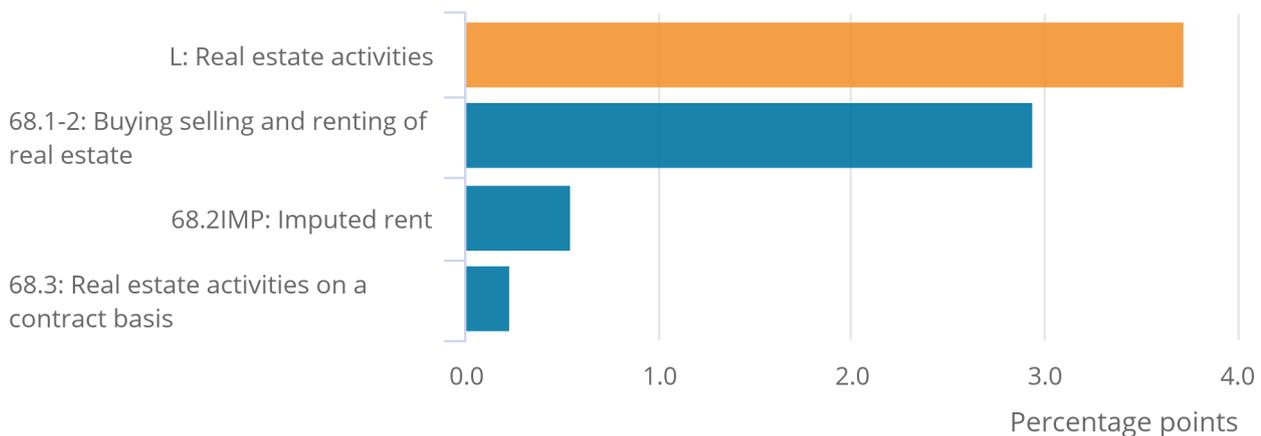
## 9 . Real estate activities

**Figure 10: The real estate activities section increased its contribution by 3.73 percentage points**

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018

### Figure 10: The real estate activities section increased its contribution by 3.73 percentage points

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018



**Source: Office for National Statistics**

**Notes:**

1. Contributions are seasonally adjusted.
2. Contributions may not sum exactly due to rounding.

The real estate sector had the second-biggest increase in Index of Services contribution from Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018, growing by 22% and increasing its contribution by 3.7 percentage points. The sector comprises just a single industry, which is divided into three sub-industries:

- 68.1-2: buying and selling, renting and operating of own or leased real estate, excluding imputed rent
- 68.2IMP: imputed rent
- 68.3: real estate activities on a fee or contract basis

There are two primary drivers of growth in the real estate sector: increases in the number of households and increases in rent and house price. We estimate that in 2017 there were 5.2% more households in the UK than in 2008. The major increase therefore came from changes in house prices. The [average price of a house in the UK in 2018](#) was 29% higher than in 2008, and it would be expected that a rise in the average house price would be correlated with a rise in the average rent. Our experimental Index of Private Housing Rental Prices found that rent prices in England increased by 19% between 2008 and 2018.

By weight, imputed rent is the largest of the sub-industries, accounting for 70% of the sector's total weight in 2018. Imputed rent captures the owner-occupancy section of the real estate market. Imputed rent is the rent that the occupant of a property would pay to live in it if they were not also the owner and it is calculated based on our measures of the rental market. In order to allow for the comparison of the real estate market across different countries it is convention to assume that every house or flat is rented.

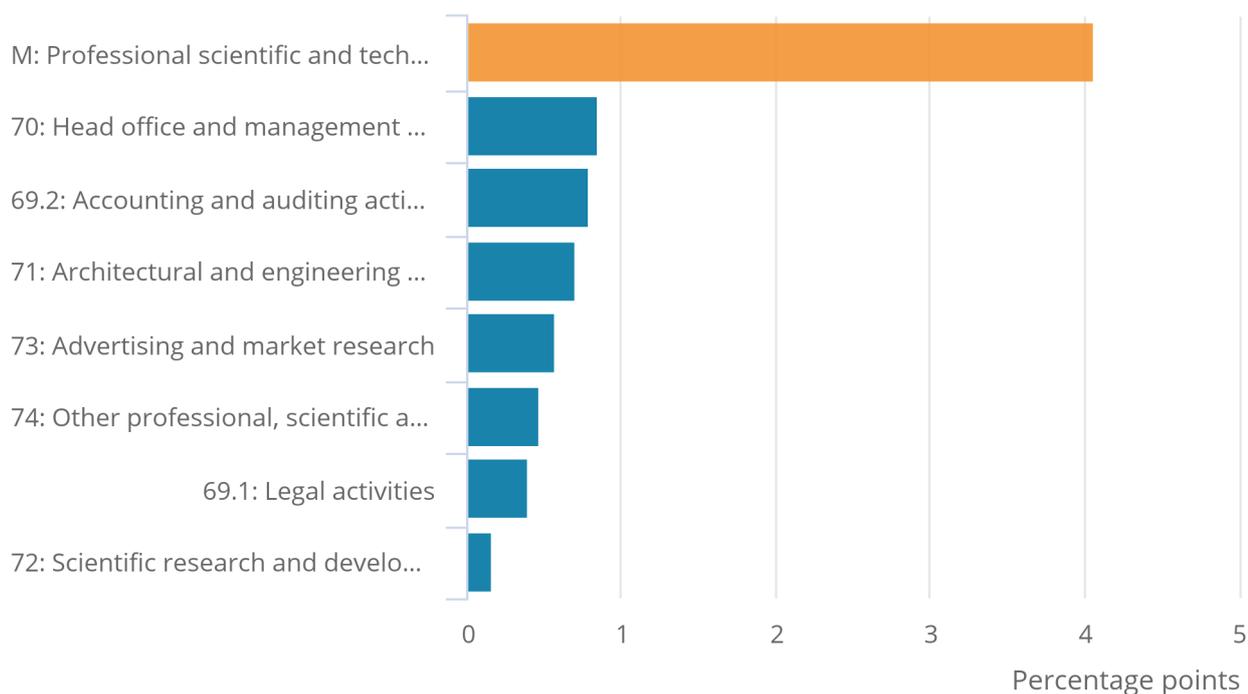
## 10 . Professional, scientific and technical activities

**Figure 11: The scientific, technical and professional activities section increased its contribution by 4.07 percentage points**

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018

Figure 11: The scientific, technical and professional activities section increased its contribution by 4.07 percentage points

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018



Source: Office for National Statistics

Notes:

1. Contributions are percentage changes in the Index of Services.
2. Contributions may not sum exactly due to rounding.

The professional, scientific and technical activities sector had the largest increase in Index of Services contribution over the decade between Quarter 1 (Jan to Mar) 2008 and Quarter 4 (Oct to Dec) 2018 of any sector, increasing its contribution by 4.1 percentage points. The sector had a widespread base of strength, with every industry within it growing by at least 13% over the decade, while the sector as a whole grew by 37%.

Activities of head offices and management consultants was the top contributing industry, with its growth of 48% over the decade meaning that it increased its top-level services contribution by 0.85 percentage points. This growth was also reflected in the number of enterprises in this industry, which grew by 54% between 2008 and 2017.

Legal activities added 0.4 points to its contribution to headline services. Despite this, legal activities was the slowest-growing industry within the sector; its average quarter-on-quarter growth from Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018 was 0.3%, less than half of the 0.8% for the sector as a whole. This slow growth, which is below the services sector's rate as a whole, is a reversal of the situation from 2000 to 2007, when the industry had an average compound annual growth rate of 8.0% and so was growing faster than the service sector as a whole.

The recent performance of the professional, scientific and technical activities sector has been strong, with its average quarter-on-quarter growth rate from Quarter 1 2017 to Quarter 4 2018 at 1.2%, well above its average of 0.8% across the whole decade.

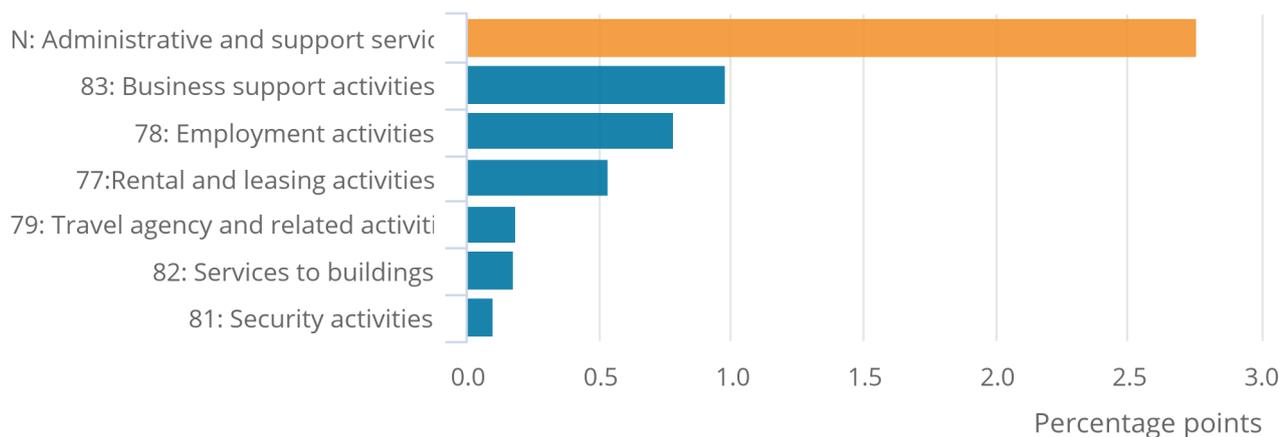
# 11 . Administrative and support service activities

**Figure 12: The administrative and support services section increased its contribution by 2.76 percentage points**

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018

Figure 12: The administrative and support services section increased its contribution by 2.76 percentage points

Seasonally adjusted, Quarter 1 (Jan to Mar) 2008 to Quarter 4 (Oct to Dec) 2018



**Source: Office for National Statistics**

**Notes:**

1. Contributions are percentage changes in the Index of Services.
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The administrative and support service sector grew by 45% and increased its contribution to the Index of Services by 2.8 percentage points over the decade between Quarter 1 (Jan to Mar) 2008 and Quarter 4 (Oct to Dec) 2018. This growth came from a broad base of strength within the sector with all industries contributing positively.

Office administrative activities was the largest contributor to growth within the sector, growing by 67% and adding 1.0 percentage point of contribution to the Index of Services. The primary contributor to the industry's growth was business support service activities not elsewhere classified, which covers the activities of collection agencies, packaging activities and other miscellaneous business activities.

The employment activities industry had the second-biggest contribution to the sector's growth, adding 1.0 percentage point. The industry grew by 81% over the period, with its sub-industry, temporary employment activity, the largest contributor to the increase. Temporary employment activity was responsible for 86% of all turnover growth within the employment activities industry between 2008 and 2017 according to the Annual Business Survey.

## **12 . Other industries**

The remaining industries within the services sector did not contribute substantially to growth. The industry with the largest contribution was creative and entertainment activities, which grew by 50% between Quarter 1 (Jan to Mar) 2008 and Quarter 4 (Oct to Dec) 2018 and added 0.3 percentage points of contribution to the Index of Services. The worst performing industry was gambling activities, which was particularly affected by the recession. Gambling activities declined by 23% over the decade and reduced its contribution by 0.5 percentage points.

## **13 . Conclusion**

The services sector is the largest part of the UK economy, forming approximately 80% of the UK's gross domestic product. Over the decade from 2008 to 2018, it has been the best performing sector in the UK economy, with an annual growth rate of 1.6% leaving the sector 16.4% above its Quarter 1 (Jan to Mar) 2008 value in Quarter 4 (Oct to Dec) 2018.

There was a marked difference in the performance of the public sector-dominated industries from the rest of the sector, with these industries cushioning the sector's fall during recession but then growing at a slower rate than the sector average from January 2010. More broadly there was a range of different performances within the sector, showing that the sector cannot be treated as a single homogenous unit with all its components behaving similarly.

## **14 . Authors**

Lead author: Henry Duquemin

Other authors: Gemma Rabaiotti, Iolo Tomlinson, Mark Stephens

## **15 . Appendix**

<b>SIC code</b>	<b>Industry description</b>
45	Wholesale and retail of motor vehicles
46	Wholesale trade excluding motor vehicles
47	Retail trade excluding motor vehicles
49	Land transport
50	Water transport
51	Air transport
52	Warehousing for transportation
53	Postal and courier activities
55	Accommodation
56	Food and beverage services
58	Publishing activities
59	Motion picture, television and music publishing
60	Programming and broadcasting
61	Telecommunications
62	Computer programming
63	Information service activities
64	Financial services except insurance
65	Insurance and pension funding
66	Auxiliary financial and insurance activities
68.1-2	Buying, selling and renting of real estate
68.2IMP	Imputed rent
68.3	Real estate activities on a contract basis
69.1	Legal activities
69.2	Accounting and auditing activities
70	Head office and management consultancy activities
71	Architectural and engineering activities
72	Scientific research and development
73	Advertising and market research
74	Other professional, scientific and technical activities
75	Veterinary activities
77	Rental and leasing activities
78	Employment activities
79	Travel agency and related activities
81	Security activities
82	Services to buildings
83	Business support activities
84	Public administration and defence

85	Education
86	Human health activities
87	Residential care activities
88	Social work activities
90	Creative, arts and entertainment activities
91	Libraries, archives, museums and other cultural activities
92	Gambling and betting activities
93	Sports activities and amusement and recreation activities
94	Activities of membership organisations
95	Repair of computers and personal and household goods
96	Other personal service activities
97	Activities of households as employers of domestic personnel
G	Wholesale retail and motor trade
H	Transportation and storage
I	Accommodation and food services
J	Information and communication
K	Financial and insurance activities
L	Real estate activities
M	Professional scientific and technical
N	Administrative and support services
O	Public administration and defence
P	Education
Q	Human health and social work activities
R	Arts, entertainment and recreation
S	Other service activities
T	Activities of households as employers