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1989

Business Monitor

Report on the Census of Production

Footwear

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BUSINESS MONITORS

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PA451

BUSINESS MONITOR

A publication of the Government Statistical Service

Report on the Census of Production 1989

Footwear

Presented by the Chancellor of the Exchequer
to Parliament in pursuance of the Statistics of Trade Act 1947
(10 & 11 Geo.6 Cha.39 sec 7)

CENTRAL STATISTICAL OFFICE
Business Statistics Office

London: Her Majesty's Stationery Office

BUSINESS MONITORS MAKING UP THE COMPLETE CENSUS REPORT

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PA243	Building products of concrete, cement or plaster	PA421	Ice-cream, cocoa, chocolate and sugar confectionery
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PA314	Metal doors, windows, etc.	PA439	Miscellaneous textiles
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PA326	Mechanical power transmission equipment	PA462	Manufacture of semi-finished wood products and further processing and treatment of wood
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PA329	Ordnance, small arms and ammunition	PA465	Miscellaneous wooden articles
PA330	Manufacture of office machinery and data processing equipment	PA466	Articles of cork and plaiting materials, brushes and brooms
PA341	Insulated wires and cables	PA467	Wooden and upholstered furniture and shop and office fittings
PA342	Basic electrical equipment	PA471	Pulp, paper and board
PA343	Electrical equipment for industrial use, and batteries and accumulators	PA472	Conversion of paper and board
PA344	Telecommunication equipment, electrical measuring equipment, electronic capital goods and passive electronic components	PA475	Printing and publishing
PA345	Miscellaneous electronic equipment	PA481	Rubber products
PA346	Domestic-type electric appliances	PA483	Processing of plastics
PA347	Electric lamps and other electric lighting equipment	PA491	Jewellery and coins
PA351	Motor vehicles and their engines	PA492	Musical instruments
PA352	Motor vehicle bodies, trailers and caravans	PA493	Photographic and cinematographic processing laboratories
PA353	Motor vehicle parts	PA494	Toys and sports goods
PA361	Shipbuilding and repairing	PA495	Miscellaneous manufacturing industries
		PA500	Construction
		PA1002	Summary volume

PA451 FOOTWEAR

PA451

The information in this report relates to businesses classified to the Footwear industry, Group 451 in the Standard Industrial Classification Revised 1980. The industry Group covers the following Activity Heading:-

4610 Footwear

Manufacture of footwear of all types and materials. The cutting of leather soles and heels is included but not wooden soles, heels or lasts, which are classified to Group 465, or plastics components which are classified to Group 483. Moulded rubber bottoms, rubber soles, heels and other rubbing components are classified to Group 481.

For a full description of the 1980 classification see Standard Industrial Classification Revised 1980, obtainable from Her Majesty's Stationery Office, price £4.25.

In interpreting the data in the tables it is essential to bear in mind the notes and definitions which commence on page 5

PERIOD COVERED
11. Businesses were asked to make returns for the calendar year 1989 but, where this was not possible, returns for 12-month periods ending between 1 April 1989 and 31 April 1990 were accepted. Returns covering fewer than twelve months were accepted for businesses which had started or ceased trading during the year.

REPORTING UNIT
2. From the various sources of production unit data for 1989 the reporting unit to the census was the establishment. This was defined as the smallest unit which would provide the full range of data required for an economic census. Establishments were asked, where possible, to include in their returns to the census any one production activity.

ESTIMATION
12. Additional Census returns include estimates for non-responding, unclassified returns and businesses not included for the Census. Estimates are also made for items not covered in the shorter form sent to smaller businesses.

13. Where employment size groups in each industry, the "average per head" is calculated for each census variable by dividing the total returns value for each variable by the total returned employment. This value is multiplied by the employment thought to exist in each non-responding or non-estimated business to yield an estimated value for that business. Estimates for items not collected on the shorter form are made in a similar way using returned employment.

14. The accuracy of the totals produced by adding together estimates and returned data is mainly dependent on the level of response. The extent to which businesses making satisfactory returns account for the total employment of any industry is shown as a percentage in footnote 1 to table 1. Thus the accuracy of the data published in an industry report where 90 per cent of the employment in the industry is covered by the returns made will, in general, be better than that in an industry report where the coverage is only 70 per cent.

15. Additionally, the extent to which individual headings in an industry report are related to employment should be taken into account in assessing the accuracy of estimated data. Thus an estimate of total earnings which bears a close relationship to total employment is likely to be more accurate than an estimate of capital expenditure where the relationship to employment is not so clearly marked.

SUPPRESSION OF INFORMATION RELATIVE TO INDIVIDUAL UNDERTAKINGS
16. Sub-section 5(7)(b) of the Statistics of Trade Act 1947 provides that:

"The following provisions shall have effect with respect to the publication of any summary, or other communication to the public of information obtained under the foregoing provisions of this Act:-

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The information in this report relates to businesses classified in the Standard Industrial Classification (SIC) 1980. The industry Group covers the following Activity Headings:

PA451	Footwear	PA410	Footwear
PA452	Manufacture of footwear of all kinds and materials. The making of leather shoes and leathers is included but not work on leather or	PA411	Manufacture of footwear of all kinds and materials. The making of leather shoes and leathers is included but not work on leather or
PA453	Leather goods	PA412	Leather goods
PA454	Leather goods	PA413	Leather goods
PA455	Leather goods	PA414	Leather goods
PA456	Leather goods	PA415	Leather goods
PA457	Leather goods	PA416	Leather goods
PA458	Leather goods	PA417	Leather goods
PA459	Leather goods	PA418	Leather goods
PA460	Leather goods	PA419	Leather goods
PA461	Leather goods	PA420	Leather goods
PA462	Leather goods	PA421	Leather goods
PA463	Leather goods	PA422	Leather goods
PA464	Leather goods	PA423	Leather goods
PA465	Leather goods	PA424	Leather goods
PA466	Leather goods	PA425	Leather goods
PA467	Leather goods	PA426	Leather goods
PA468	Leather goods	PA427	Leather goods
PA469	Leather goods	PA428	Leather goods
PA470	Leather goods	PA429	Leather goods
PA471	Leather goods	PA430	Leather goods
PA472	Leather goods	PA431	Leather goods
PA473	Leather goods	PA432	Leather goods
PA474	Leather goods	PA433	Leather goods
PA475	Leather goods	PA434	Leather goods
PA476	Leather goods	PA435	Leather goods
PA477	Leather goods	PA436	Leather goods
PA478	Leather goods	PA437	Leather goods
PA479	Leather goods	PA438	Leather goods
PA480	Leather goods	PA439	Leather goods
PA481	Leather goods	PA440	Leather goods
PA482	Leather goods	PA441	Leather goods
PA483	Leather goods	PA442	Leather goods
PA484	Leather goods	PA443	Leather goods
PA485	Leather goods	PA444	Leather goods
PA486	Leather goods	PA445	Leather goods
PA487	Leather goods	PA446	Leather goods
PA488	Leather goods	PA447	Leather goods
PA489	Leather goods	PA448	Leather goods
PA490	Leather goods	PA449	Leather goods
PA491	Leather goods	PA450	Leather goods
PA492	Leather goods	PA451	Leather goods
PA493	Leather goods	PA452	Leather goods
PA494	Leather goods	PA453	Leather goods
PA495	Leather goods	PA454	Leather goods
PA496	Leather goods	PA455	Leather goods
PA497	Leather goods	PA456	Leather goods
PA498	Leather goods	PA457	Leather goods
PA499	Leather goods	PA458	Leather goods
PA500	Leather goods	PA459	Leather goods
PA501	Leather goods	PA460	Leather goods
PA502	Leather goods	PA461	Leather goods
PA503	Leather goods	PA462	Leather goods
PA504	Leather goods	PA463	Leather goods
PA505	Leather goods	PA464	Leather goods
PA506	Leather goods	PA465	Leather goods
PA507	Leather goods	PA466	Leather goods
PA508	Leather goods	PA467	Leather goods
PA509	Leather goods	PA468	Leather goods
PA510	Leather goods	PA469	Leather goods
PA511	Leather goods	PA470	Leather goods
PA512	Leather goods	PA471	Leather goods
PA513	Leather goods	PA472	Leather goods
PA514	Leather goods	PA473	Leather goods
PA515	Leather goods	PA474	Leather goods
PA516	Leather goods	PA475	Leather goods
PA517	Leather goods	PA476	Leather goods
PA518	Leather goods	PA477	Leather goods
PA519	Leather goods	PA478	Leather goods
PA520	Leather goods	PA479	Leather goods
PA521	Leather goods	PA480	Leather goods
PA522	Leather goods	PA481	Leather goods
PA523	Leather goods	PA482	Leather goods
PA524	Leather goods	PA483	Leather goods
PA525	Leather goods	PA484	Leather goods
PA526	Leather goods	PA485	Leather goods
PA527	Leather goods	PA486	Leather goods
PA528	Leather goods	PA487	Leather goods
PA529	Leather goods	PA488	Leather goods
PA530	Leather goods	PA489	Leather goods
PA531	Leather goods	PA490	Leather goods
PA532	Leather goods	PA491	Leather goods
PA533	Leather goods	PA492	Leather goods
PA534	Leather goods	PA493	Leather goods
PA535	Leather goods	PA494	Leather goods
PA536	Leather goods	PA495	Leather goods
PA537	Leather goods	PA496	Leather goods
PA538	Leather goods	PA497	Leather goods
PA539	Leather goods	PA498	Leather goods
PA540	Leather goods	PA499	Leather goods
PA541	Leather goods	PA500	Leather goods
PA542	Leather goods	PA501	Leather goods
PA543	Leather goods	PA502	Leather goods
PA544	Leather goods	PA503	Leather goods
PA545	Leather goods	PA504	Leather goods
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PA560	Leather goods	PA519	Leather goods
PA561	Leather goods	PA520	Leather goods
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PA563	Leather goods	PA522	Leather goods
PA564	Leather goods	PA523	Leather goods
PA565	Leather goods	PA524	Leather goods
PA566	Leather goods	PA525	Leather goods
PA567	Leather goods	PA526	Leather goods
PA568	Leather goods	PA527	Leather goods
PA569	Leather goods	PA528	Leather goods
PA570	Leather goods	PA529	Leather goods
PA571	Leather goods	PA530	Leather goods
PA572	Leather goods	PA531	Leather goods
PA573	Leather goods	PA532	Leather goods
PA574	Leather goods	PA533	Leather goods
PA575	Leather goods	PA534	Leather goods
PA576	Leather goods	PA535	Leather goods
PA577	Leather goods	PA536	Leather goods
PA578	Leather goods	PA537	Leather goods
PA579	Leather goods	PA538	Leather goods
PA580	Leather goods	PA539	Leather goods
PA581	Leather goods	PA540	Leather goods
PA582	Leather goods	PA541	Leather goods
PA583	Leather goods	PA542	Leather goods
PA584	Leather goods	PA543	Leather goods
PA585	Leather goods	PA544	Leather goods
PA586	Leather goods	PA545	Leather goods
PA587	Leather goods	PA546	Leather goods
PA588	Leather goods	PA547	Leather goods
PA589	Leather goods	PA548	Leather goods
PA590	Leather goods	PA549	Leather goods
PA591	Leather goods	PA550	Leather goods
PA592	Leather goods	PA551	Leather goods
PA593	Leather goods	PA552	Leather goods
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PA600	Leather goods	PA559	Leather goods
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PA602	Leather goods	PA561	Leather goods
PA603	Leather goods	PA562	Leather goods
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PA607	Leather goods	PA566	Leather goods
PA608	Leather goods	PA567	Leather goods
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PA611	Leather goods	PA570	Leather goods
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PA618	Leather goods	PA577	Leather goods
PA619	Leather goods	PA578	Leather goods
PA620	Leather goods	PA579	Leather goods
PA621	Leather goods	PA580	Leather goods
PA622	Leather goods	PA581	Leather goods
PA623	Leather goods	PA582	Leather goods
PA624	Leather goods	PA583	Leather goods
PA625	Leather goods	PA584	Leather goods
PA626	Leather goods	PA585	Leather goods
PA627	Leather goods	PA586	Leather goods
PA628	Leather goods	PA587	Leather goods
PA629	Leather goods	PA588	Leather goods
PA630	Leather goods	PA589	Leather goods
PA631	Leather goods	PA590	Leather goods
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PA654	Leather goods	PA613	Leather goods
PA655	Leather goods	PA614	Leather goods
PA656	Leather goods	PA615	Leather goods
PA657	Leather goods	PA616	Leather goods
PA658	Leather goods	PA617	Leather goods
PA659	Leather goods	PA618	Leather goods
PA660	Leather goods	PA619	Leather goods
PA661	Leather goods	PA620	Leather goods
PA662	Leather goods	PA621	Leather goods
PA663	Leather goods	PA622	Leather goods
PA664	Leather goods	PA623	Leather goods
PA665	Leather goods	PA624	Leather goods
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PA669	Leather goods	PA628	Leather goods
PA670	Leather goods	PA629	Leather goods
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PA692	Leather goods	PA651	Leather goods
PA693	Leather goods	PA652	Leather goods
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PA695	Leather goods	PA654	Leather goods
PA696	Leather goods	PA655	Leather goods
PA697	Leather goods	PA656	Leather goods
PA698	Leather goods	PA657	Leather goods
PA699	Leather goods	PA658	Leather goods
PA700	Leather goods	PA659	Leather goods

EXPLANATORY NOTES AND DEFINITIONS

INTRODUCTION
1. These notes give basic information to help with the interpretation of tables in this Industry Report. More general information about the Census is given in a separate Business Monitor - Report on the Census of Production, Introductory Notes (PA 1001).

2. Since 1980, Censuses have been conducted on the Standard Industrial Classification Revised 1980 (SIC(80)). The Standard Industrial Classification exists to promote uniformity and comparability in the official statistics of the United Kingdom. The SIC(80) is the result of an attempt to align the United Kingdom classification with the General Industrial Classification of Economic Activities within the European Communities (NACE). It is based on activity rather than commodities produced. A full description of SIC(80) is given in Standard Industrial Classification Revised 1980, obtainable from Her Majesty's Stationery Office, price £4.25.

REPORTING UNIT

3. From the earliest censuses of production until that for 1986 the reporting unit to the census was the establishment. This was defined as the smallest unit which could provide the full range of data required for an economic census. Establishments were asked, where possible, to exclude from their returns to the census any non-production activity.

4. In 1987, for a number of administrative and statistical reasons, a new system of company-based reporting was introduced. Under the new system the reporting unit to the census is, generally, the company, but there are some exceptions. These arise, for example, for large mixed activity companies which are asked to make separate returns to the census for each of their production activities on an establishment basis. Throughout this monitor this mixture of reporting units are referred to as "businesses". These businesses are no longer asked to exclude non-production activities.

5. In practice, since most businesses, both before and after the change, reported for the company as a whole, little difference to the main economic series has resulted from the change.

6. For most businesses, the returned data are appropriate to a single activity heading of SIC(80) and fall within a single geographical region. Where information covers a mixture of activities, the business is classified according to the main activity. Where the business operates at a number of different addresses then, in order to enable regional data to be compiled, separate information on employment and capital expenditure is sought for each address.

THE REGISTER

7. A register of businesses throughout the United Kingdom is held on the BSO computer and provides the basis for BSO inquiries. For each business the register contains identification particulars and information about its eligibility for inclusion in an inquiry, its relationship with other businesses in common ownership, its industrial classification, the nationality of its parent and location

TABLE 1

PA451

Output and costs, 1985-1989
All United Kingdom businesses classified to the industry (a)

	Unit	1985	1986	1987	1988	1989
Enterprises	Number	750	766	795	788	765
Businesses	"	797	815	831	827	801
Sales of goods produced	£ million	974.6	1,025.3	1,110.6(b)	1,129.2(b)	1,085.7
Work done and industrial services rendered	"	3.6	4.3	5.3	6.7	6.0
Capital goods produced for use within the business	"	0.4	0.6	(b)	(b)	4.4
Non-industrial services rendered	"	2.8	3.4	3.3	3.3	5.0
Goods merchanted or factored	"	74.7	104.3	176.6	205.4	204.8
Total sales and work done	"	1,056.1	1,137.9	1,295.8	1,344.5	1,305.9
Increase during the year, work in progress and goods on hand for sale	"	3.4	3.1	27.9	9.3	-5.7
Gross output	"	1,059.5	1,141.0	1,323.7	1,353.8	1,300.2
Purchases of materials for use in production, packaging and fuel	"	411.0	423.5	471.6	492.1	478.7
Purchases of goods for merchenting or factoring	"	53.4	70.9	118.2	134.4	133.7
Increase during the year, stocks of materials, stores and fuel	"	4.6	0.1	9.2	4.2	-1.8
Cost of industrial services received	"	19.2	19.4	22.8	23.5	23.0
Net output	"	580.4	627.2	720.3	708.0	663.1
Total employment	Thousand	51.7	51.7	56.9	54.3	49.6
Net output per head	£	11,230	12,122	12,662	13,033	13,365
Cost of non-industrial services received						
Hire of vehicles, plant and machinery	£ million	9.1	10.9	10.1	9.2	8.6
Rents of industrial and commercial buildings	"	1.9	2.0	14.8	16.6	16.3
Commercial insurance premiums	"	3.4	4.1	5.2	5.9	5.5
Bank charges	"	0.8	1.0	1.3	1.5	1.6
Other non-industrial services	"	45.5	50.9	52.4	61.8	61.1(c)
Licensing of motor vehicles	"	0.3	0.3	0.3	0.3	0.2
Rates, excluding water rates	"	5.6	6.2	11.5	12.3	13.1
Gross value added at factor cost	"	513.9	551.9	624.7	600.5	556.5
Gross value added at factor cost per head	£	9,943	10,666	10,982	11,054	11,217

(a) Satisfactory returns accounted for 85 per cent of employment within the industry in 1989.

(b) Capital goods produced for use within the business included in sales of goods produced.

(c) Includes the cost of transport of goods by road (within the UK) of £12 million and postal and telecommunication costs of £5 million. These were collected separately for 1989 but not for the other years shown in the table.

PA451

Total sales and work done	Gross output	Net output		Gross value added at factor cost		Net capital expenditure (d)	Total stocks and work in progress at end of year
		Total	per head	Total	per head		
£ million	£ million	£ million	£	£ million	£	£ million	£ million
239.1	239.5	115.4	12,183	(e)	(e)	4.7	37.3
172.1	172.7	87.6	12,213	173.9(e)	10,413(e)	2.6	30.7
114.4	114.0	59.5	13,992	52.4	12,309	1.6	17.7
87.2	87.0	42.2	11,334	36.2	9,722	1.2	11.6
38.5	38.7	21.7	12,305	19.2	10,914	0.4	5.8
195.4	193.3	95.4	14,038	79.4	11,694	1.2	40.8
459.3	455.1	241.2	14,683	195.4	11,890	2.4	89.6
1,305.9	1,300.2	663.1	13,365	556.5	11,217	14.1	233.6

(a) From 1988 contributors were asked to include as capital expenditure the value of assets acquired under finance leasing arrangements - see Table 2

TABLE 5

PA451

Percentage analysis of twelve-month periods covered by returns received for the 1989 Census by number of returns and total employment

Accounting year ended	Percentage of total returns received	Percentage of total employment
1989		
April 6-30	6.3	3.5
May	2.9	4.6
June	7.4	6.2
July	3.4	0.8
August	5.1	2.3
September	5.7	2.3
October	2.9	1.1
November	3.4	2.8
December	34.9	37.9
1990		
January	3.4	27.8
February	2.3	1.6
1 March - 5 April	22.3	9.3

TABLE 6

Operating ratios, 1985-1989

All United Kingdom businesses classified to the industry

	Unit	1985	1986	1987	1988	1989
Gross output per head	£	20,498	22,051	23,267	24,922	26,208
Net output per head	£	11,230	12,122	12,662	13,033	13,365
Gross value added per head	£	9,943	10,666	10,982	11,054	11,217
Gross value added as a percentage of gross output	%	49	48	47	44	43
Ratio of gross output to stocks		6.3	6.3	5.7	5.3	5.6
Wages and salaries as a percentage of gross value added	%	61	61	59	63	66
Ratio of operatives to administrative, technical and clerical employees		5.1	5.2	5.4	5.3	4.8
Wages and salaries per operative	£	5,511	5,908	5,834	6,253	6,490
Wages and salaries per administrative, technical and clerical employee	£	9,055	9,906	10,212	11,158	12,024
Net capital expenditure per head (a)	£	504	589	512	477	285
Net capital expenditure as a percentage of gross value added (a)	%	5	6	5	4	3

(a) From 1988 contributors were asked to include as capital expenditure the value of assets acquired under finance leasing arrangements - see Table 2.

TABLE 7

PA451

Regional distribution of employment, net capital expenditure, net output and gross value added at factor cost, 1989
All United Kingdom businesses classified to the industry

Area	Total employment (a)		Net capital expenditure (b)		Net output (c)		Gross value added at factor cost (c)	
	Thousand	per cent of United Kingdom	£ million	per cent of United Kingdom	£ million	per cent of United Kingdom	£ million	per cent of United Kingdom
Standard regions of England								
North	3.5	7.0	1.0	6.9	51.0	7.7	43.1	7.7
Yorkshire and Humberside	3.3	6.7	0.8	5.8	42.5	6.4	33.5	6.0
East Midlands	17.1	34.5	0.2	1.3	222.5	33.6	191.5	34.4
East Anglia	2.4	4.8	0.2	1.1	34.2	5.2	28.5	5.1
South East	3.8	7.7	2.5	17.4	51.5	7.8	41.7	7.5
South West	6.9	13.9	3.0	21.4	103.8	15.7	81.8	14.7
West Midlands	2.4	4.9	2.4	16.8	33.6	5.1	29.4	5.3
North West	7.2	14.5	3.6	25.8	88.8	13.4	77.6	13.9
England	46.7	94.1	13.7	96.5	627.9	94.7	527.2	94.7
Wales	*	*	*	*	*	*	*	*
Scotland	1.2	2.5	0.4	2.7	12.4	1.9	9.8	1.8
Great Britain	*	*	*	*	*	*	*	*
Northern Ireland	*	*	*	*	*	*	*	*
United Kingdom	49.6	100.0	14.1	100.0	663.1	100.0	556.5	100.0

(a) Average number employed during the year, including full and part-time employees and working proprietors.

(b) New building work plus acquisitions less disposals of land and existing buildings, vehicles and plant and machinery. The value also includes assets acquired under finance leasing arrangements - see Table 2.

(c) Where a census return covered addresses in two or more regions, an estimate of the net output attributable to each address was made by assuming that net output was proportionate to employment. An estimate for each region was obtained by aggregating estimates of net output for addresses located in that region. Gross value added at factor cost was treated similarly.



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