

Article

Understanding the business impacts of local and national restrictions, UK: May 2021

Experimental estimates from the voluntary fortnightly business survey (BICS), for single site businesses only, on topics such as trading status, financial performance, workforce and business resilience. Geographical breakdowns include country, regional and local authority levels.

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Table of contents

1. [Main points](#)
2. [Overview of the business impacts of local and national restrictions](#)
3. [Geographical analysis of business impacts](#)
4. [Trading status](#)
5. [Workforce](#)
6. [Financial performance](#)
7. [Business impacts of national and local restrictions data](#)
8. [Glossary](#)
9. [Data sources and quality](#)
10. [Related links](#)

1 . Main points

- All four UK countries saw an increase in the percentage of single-site businesses currently trading from late March to early May 2021, as coronavirus (COVID-19) restrictions were relaxed.
- Wales had the highest percentage of single-site businesses currently trading in early May 2021, at 87%.
- Scotland has consistently had the highest proportion of its single-site businesses' workforce on furlough leave since early November 2020.
- Northern Ireland has consistently had the lowest percentage of single-site businesses experiencing a decrease in turnover since early November 2020.
- The interactive map in [Section 3](#) allows users to explore how business impacts differ by geography, based on weighted single-site Wave 30 BICS results.

2 . Overview of the business impacts of local and national restrictions

This article uses the microdata from the Business Insights and Conditions Survey (BICS) to help understand business impacts on the sub-national UK economy.

To produce sub-national insights, we focus on those UK businesses which have a single business site only. Overall, single-site businesses represent 98% of all businesses, and approximately half of total UK turnover and employment. Details on the sample and single-site methodology can be found in [Section 9](#) and in our [first sub-national BICS article](#).

The results in this release are likely to reflect structural differences between countries and regions, as well as differences in the nature and timing of coronavirus (COVID-19) restrictions.

This article predominately focuses on Wave 27 to Wave 30 of BICS, covering the period 8 March to 16 May 2021, as coronavirus (COVID-19) restrictions were relaxed across all four UK countries. It also focuses on the services sector, which saw significant changes in rules during this time.

3 . Geographical analysis of business impacts

The interactive map below shows sub-national results at a NUTS 2 level using weighted single-site Wave 30 Business Insights and Conditions Survey (BICS) results. This covers the period 19 April to 16 May 2021.

Figure 1: Interactive map highlighting the impacts of the coronavirus (COVID-19) pandemic for Wave 30 of BICS on single-site businesses

Percentages of single-site businesses, broken down by region, UK, 19 April to 16 May 2021

Notes:

1. Weighted single-site results, Wave 30 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Currently trading: all single-site businesses, weighted by count.
3. On furlough leave: single-site businesses not permanently stopped trading, weighted by employment.
4. Decrease in turnover: single-site businesses currently trading, weighted by turnover.
5. Cash reserves (three months or less): single-site businesses not permanently stopped trading, weighted by turnover.
6. On furlough leave and Decrease in turnover: Businesses were asked for their experiences for the reference period 19 April to 2 May 2021. However, for questions regarding the last two weeks, businesses may respond from the point of completion of the questionnaire (4 to 16 May 2021).

[Download the data](#)

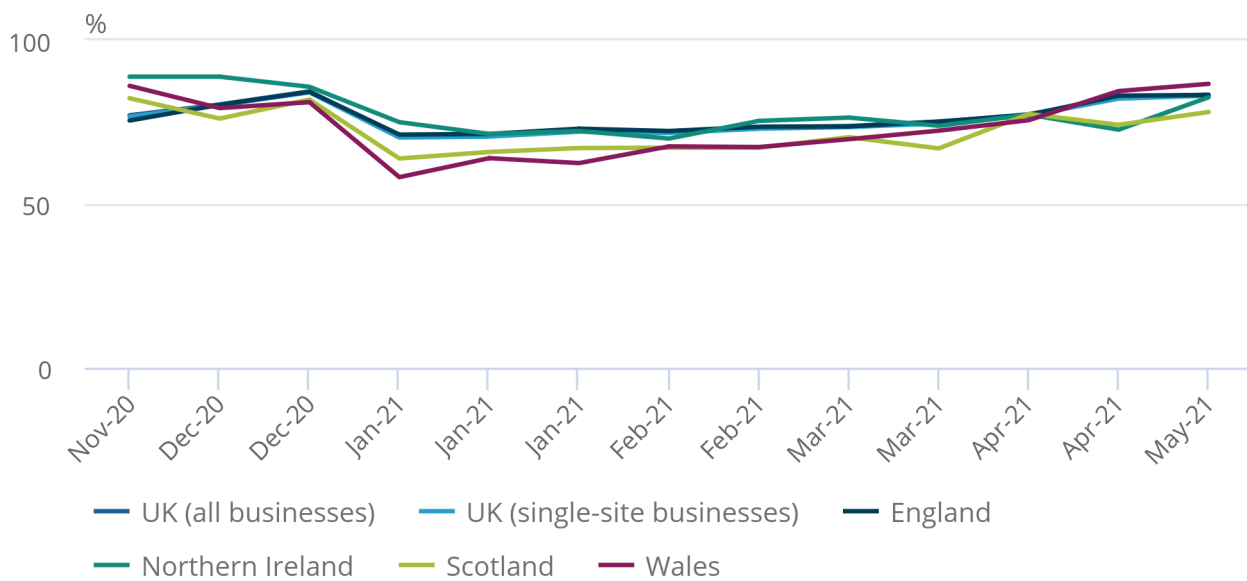
4 . Trading status

Figure 2: Wales had the highest percentage of single-site businesses currently trading in early May, at 87%

Currently trading, all single-site businesses, broken down by country, weighted by count, UK, 16 November 2020 to 16 May 2021

Figure 2: Wales had the highest percentage of single-site businesses currently trading in early May, at 87%

Currently trading, all single-site businesses, broken down by country, weighted by count, UK, 16 November 2020 to 16 May 2021



Source: Office for National Statistics - Business Insights and Conditions Survey

Notes:

1. Final weighted all UK site results and weighted single-site results, Wave 18 to Wave 30 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Data are plotted in the middle of the two-week reference period of each wave.

All four UK countries saw an increase in the percentage of single-site businesses currently trading from late March to early May 2021, as coronavirus (COVID-19) restrictions were relaxed.

- Wales saw the largest increase, from 72% to 87%
- England saw the smallest increase, from 75% to 83%

At the UK-level, the services sector increased from 72% of single-site businesses currently trading in late March to 83% in early May 2021.

Figure 3: Northern Ireland had the highest percentage of single-site businesses currently trading in the services sector in early May, at 89%

Currently trading, all single-site businesses, broken down by region and sector, weighted by count, UK, 4 to 16 May 2021

Notes:

1. Weighted single-site results, Wave 30 of the Office for National Statistics' Business Insights and Conditions Survey.
2. For quality purposes, all industries have been collated to construction, production (including: 2-digit SIC 5 to 29, inclusive), and services (including: 2-digit SIC 45 to 98, inclusive).
3. The hospitality sector is an additional breakdown of the services sector and includes the following 2-digit SICs: 55, 56, 79, 90, 91 and 93.

[Download the data](#)

5 . Workforce

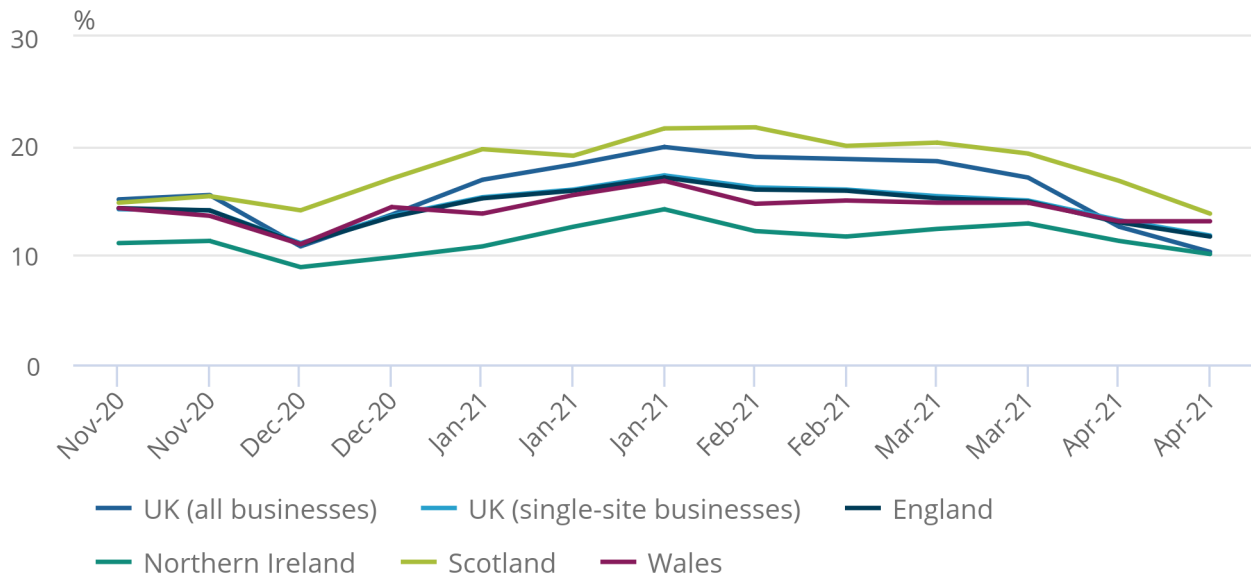
All the following data was provided by single-site businesses not permanently stopped trading.

Figure 4: Scotland has consistently had the highest proportion of its workforce on furlough leave since early November 2020

Proportion of workforce on furlough leave, of single-site businesses not permanently stopped trading, broken down by country, weighted by employment, UK, 2 November 2020 to 2 May 2021

Figure 4: Scotland has consistently had the highest proportion of its workforce on furlough leave since early November 2020

Proportion of workforce on furlough leave, of single-site businesses not permanently stopped trading, broken down by country, weighted by employment, UK, 2 November 2020 to 2 May 2021



Source: Office for National Statistics - Business Insights and Conditions Survey

Notes:

1. Final weighted all UK site results and weighted single-site results, Wave 18 to Wave 30 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Data are plotted in the middle of the two-week reference period of each wave.
3. Businesses were asked for their experiences for the reference period. However, for questions regarding the last two weeks, businesses may respond from the point of completion of the questionnaire.

All four UK countries saw a fall in the proportion of their single-site businesses' workforce on furlough leave from mid-March to late April 2021, as coronavirus (COVID-19) restrictions were relaxed.

- Scotland saw the largest fall, from 20% to 14%
- Wales saw the smallest fall, from 15% to 13%

At the UK-level, the services sector fell from 19% of single-site businesses' workforce on furlough leave in mid-March to 14% in late April 2021.

Figure 5: The South West had the lowest proportion of its single-site businesses' workforce on furlough leave in the services sector in late April, at 10%

Proportion of workforce on furlough leave, of single-site businesses not permanently stopped trading, broken down by region and sector, weighted by employment, UK, 19 April to 2 May 2021

Notes:

1. Weighted single-site results, Wave 30 of the Office for National Statistics' Business Insights and Conditions Survey.
2. For quality purposes, all industries have been collated to construction, production (including: 2-digit SIC 5 to 29, inclusive), and services (including: 2-digit SIC 45 to 98, inclusive).
3. The hospitality sector is an additional breakdown of the services sector and includes the following 2-digit SICs: 55, 56, 79, 90, 91 and 93.
4. Businesses were asked for their experiences for the reference period 19 April to 2 May 2021. However, for questions regarding the last two weeks, businesses may respond from the point of completion of the questionnaire (4 to 16 May 2021).

[Download the data](#)

6 . Financial performance

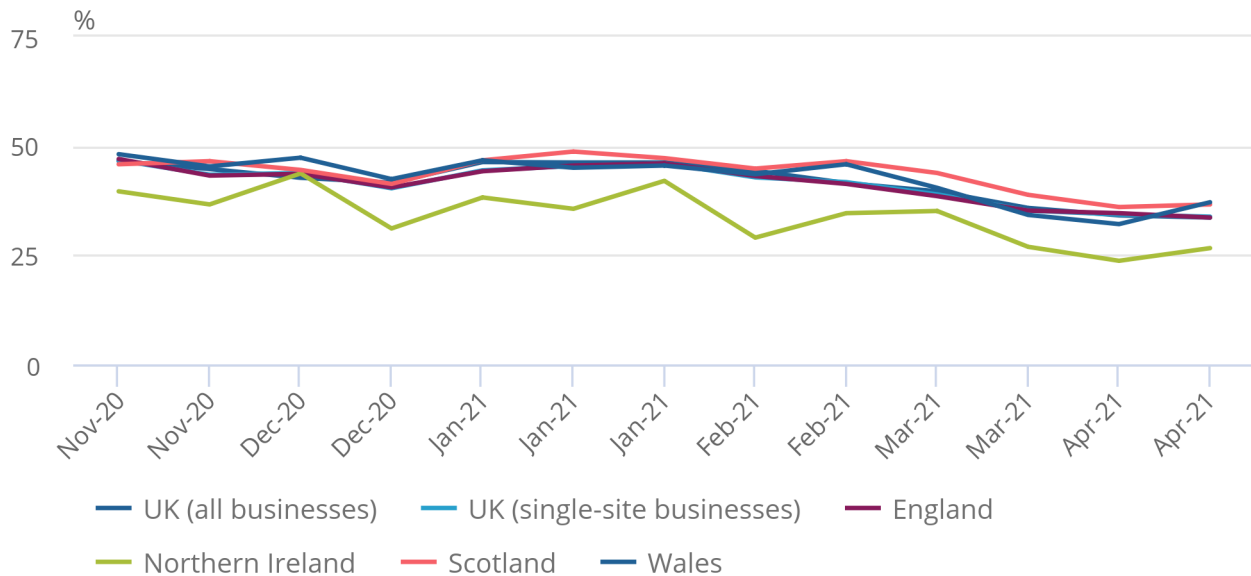
All the following data are compared with normal expectations for this time of year and was provided by single-site businesses currently trading.

Figure 6: Northern Ireland has consistently had the lowest percentage of single-site businesses experiencing a decrease in turnover since early November 2020

Decrease in turnover compared with normal expectations for this time of year, single-site businesses currently trading, broken down by country, weighted by turnover, UK, 2 November 2020 to 2 May 2021

Figure 6: Northern Ireland has consistently had the lowest percentage of single-site businesses experiencing a decrease in turnover since early November 2020

Decrease in turnover compared with normal expectations for this time of year, single-site businesses currently trading, broken down by country, weighted by turnover, UK, 2 November 2020 to 2 May 2021



Source: Office for National Statistics - Business Insights and Conditions Survey

Notes:

1. Final weighted all UK site results and weighted single-site results, Wave 18 to Wave 30 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Data are plotted in the middle of the two-week reference period of each wave.
3. Businesses were asked for their experiences for the reference period. However, for questions regarding the last two weeks, businesses may respond from the point of completion of the questionnaire.

All four UK countries saw a fall in the percentage of single-site businesses experiencing a decrease in turnover from mid-March to late April 2021, as coronavirus (COVID-19) restrictions were relaxed.

- Northern Ireland saw the largest fall, from 35% to 27%
- Wales saw the smallest fall, from 40% to 37%

At the UK-level, the services sector fell from 40% of single-site businesses experiencing a decrease in turnover in mid-March to 36% in late April 2021.

Figure 7: The North East had the lowest percentage of single-site businesses experiencing a decrease in turnover in the services sector in late April, at 23%

Decrease in turnover compared with normal expectations for this time of year, single-site businesses currently trading, broken down by region and sector, weighted by turnover, UK, 19 April to 2 May 2021

Notes:

1. Weighted single-site results, Wave 30 of the Office for National Statistics' Business Insights and Conditions Survey.
2. For quality purposes, all industries have been collated to construction, production (including: 2-digit SIC 5 to 29, inclusive), and services (including: 2-digit SIC 45 to 98, inclusive).
3. The hospitality sector is an additional breakdown of the services sector and includes the following 2-digit SICs: 55, 56, 79, 90, 91 and 93.
4. Businesses were asked for their experiences for the reference period 19 April to 2 May 2021, however, for questions regarding the last two weeks, businesses may respond from the point of completion of the questionnaire (4 to 16 May 2021).
5. "*" equals percentage less than 1% or count less than 10.

[Download the data](#)

7 . Business impacts of national and local restrictions data

[Business insights and impact on the subnational UK economy](#)

Dataset | Released 25 May 2021

Experimental subnational estimates from the voluntary fortnightly Business Insights and Conditions Survey (BICS), for single-site businesses only, on topics such as trading status, financial performance, workforce and business resilience. Geographical breakdowns include country, regional and local authority levels.

8 . Glossary

Coronavirus

Coronaviruses are a family of viruses that cause disease in people and animals. They can cause the common cold or more severe diseases, such as COVID-19.

COVID-19

COVID-19 is the name used to refer to the disease caused by the SARS CoV-2 virus, which is a type of coronavirus. The Office for National Statistics (ONS) takes COVID-19 to mean presence of SARS-CoV-2 with or without symptoms.

Furlough

Furlough is a temporary absence from work allowing workers to keep their job while the coronavirus (COVID-19) pandemic continues.

Reporting unit

The business unit to which questionnaires are sent is called the reporting unit. The response from the reporting unit can cover the enterprise as a whole or parts of the enterprise identified by lists of local units.

9 . Data sources and quality

The Business Insights and Conditions Survey (BICS) is voluntary and the results are [experimental](#).

Table 1: Sample and response rates for all businesses and single-site businesses for Waves 27, 28, 29 and 30 of the Business Insights and Conditions Survey

Wave	Wave 27	Wave 28	Wave 29	Wave 30
All businesses sample	38,929	39,002	38,919	38,834
All businesses response	10,066	9,857	9,744	9,547
All businesses rate	25.9%	25.3%	25.0%	24.6%
Single-site businesses sample	27,269	27,402	27,331	27,243
Single-site businesses response	6,491	6,311	6,257	6,105
Single-site businesses rate	23.8%	23.0%	22.9%	22.4%

Source: Office for National Statistics - Business Insights and Conditions Survey

Additional tables including response rates, proportional breakdowns of single-site businesses vs multi-sites businesses, and the distribution of single-site businesses across industries can be found in the [accompanying dataset](#).

The make-up of single-site businesses that responded within a certain region and in a certain wave can impact sub-national BICS estimates. This should be considered when interpreting results.

Subnational BICS estimates

Subnational BICS estimates have been created by using the results collected in the fortnightly business survey (BICS). Each survey return from each reporting unit is then applied to the reporting unit's one local site. We have removed businesses with multiple sites from the sample and results in this analysis are based on single-site businesses only (as identified on the [IDBR](#)). Sections 2 and 3 of our [first sub-national BICS article](#) outlines in detail the methodology behind our single-site subnational estimates and its impact compared with previously published results encompassing all businesses.

Aggregates of [Nomenclature of Territorial Units for Statistics \(NUTS1\)](#) regions such as the UK or England may have higher or lower response proportions than any of their constituent regions because of differences in the sample composition in terms of company workforce.

Because the larger aggregate regions, such as the UK or England, generally have a larger proportion of smaller companies, if there is a substantial difference between the response proportions of larger and smaller companies, this will be reflected in the top-line figures.

Weighting

Single-site estimates in this release are weighted, ensuring estimates are representative of all single-site businesses. A detailed description of the weighting methodology and its differences to unweighted estimates is available in [Business Impact of Coronavirus \(COVID-19\) Survey \(BICS\): preliminary weighted results](#).

[Weighted estimates for Scotland for businesses with greater than nine employees](#) are available from the Scottish Government.

Single site sample

While the single-site approach is not representative of all UK businesses (as it excludes businesses with multiple sites), weighted single-site estimates are representative of all UK single-site businesses and approximately 98% of all businesses (and half of total UK turnover and employment). Tables in the [accompanying datasets](#) show how the composition by region and industry when using the single sites approach holds up, when compared with the all businesses sample.

10 . Related links

[Business insights and impact on the UK economy: 20 May 2021](#)

Bulletin | Released 20 May 2021

The impact of the coronavirus (COVID-19) pandemic and EU transition period on UK businesses and the economy. Based on responses from the voluntary fortnightly Business Insights and Conditions Survey (BICS) about financial performance, workforce, prices, trade, and business resilience.

[Business Impact of Coronavirus \(COVID-19\) Survey: preliminary weighted results](#)

Article | Released 14 September 2020

Early estimates of weighted responses from the voluntary fortnightly business survey, focusing on business' responses on how turnover, workforce and trading status have been affected in two-week reference periods, from Wave 7 (1 to 14 June 2020) to Wave 12 (10 to 23 August 2020).

[Business Insights and Conditions Survey, analysis over time, UK: 24 August 2020 to 4 April 2021](#)

Article | Released 7 May 2021

These indicators and analysis are based on selected responses over time from the new voluntary fortnightly business survey (BICS), which captures business' responses on how their turnover, trade and business resilience have been affected in the two-week reference period. The data relate to the period 24 August 2020 to 4 April 2021 (Wave 13 to Wave 27).

[Business Impact of Coronavirus \(COVID-19\) Survey, expectation responses over time, UK: 1 June to 23 August 2020 \(Waves 6 to 11\)](#)

Article | Released 8 September 2020

Turnover expectations of the same businesses over time, using the final results of Waves 6 to 11 of the voluntary fortnightly Business Impact of Coronavirus (COVID-19) Survey (BICS), covering the period 1 June to 23 August 2020.

[Coronavirus and the experiences of UK businesses, textual analysis: March 2020 to July 2020](#)

Article | Released 6 August 2020

Analysis of qualitative responses from selected questions from the fortnightly Business Impact of Coronavirus (COVID-19) Survey (BICS), which provides further insights on individual business experiences over the course of the pandemic so far.

[Comparison of furloughed jobs data, UK: March 2020 to January 2021](#)

Article | Released 5 March 2021

An overview of the similarities and differences between the fortnightly Business Insights and Conditions Survey furlough estimates and HMRC's Coronavirus Job Retention Scheme statistics, over the period 23 March 2020 to 7 February 2021.