

Article

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

Experimental estimates from the voluntary fortnightly business survey (BICS) 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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# 1 . Main points

- Wales had the highest percentage of single-site businesses currently trading in early July 2021, at 98%.
- Scotland has consistently had the highest proportion of its workforce on furlough leave since early November 2020, but as of late June 2021 is a similar level to both England and Wales.
- Northern Ireland has consistently reported 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 Wave 18 to Wave 34 weighted single-site estimates.
- In addition to single-site subnational estimates, this release also includes datasets based on multi-site subnational estimates, this being the first time such estimates have been produced based on BICS; the text in [Section 4](#) of this bulletin describes how a higher or lower presence of multi-site businesses in a region might impact estimates for that region.

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

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

Most of the subnational insights are based on those UK businesses that 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 single-site sample and single-site methodology can be found in [Section 10](#) and in our [first subnational BICS article](#).

In addition to single-site subnational estimates, we also provide multi-site subnational estimates for the first time. Detail behind these estimates is presented in [Section 4](#). The estimates have been introduced as the demand for weighted regional estimates representative of all businesses has increased.

All current BICS subnational estimates should be treated as experimental estimates.

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

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 31 to Wave 34 of BICS, covering the period 3 May to 11 July 2021. The data reflect business statuses at a time when the UK was moving out of coronavirus restrictions, as all four UK nations had started easing rules in early May 2021.

### 3 . Geographical single-site analysis of business impacts

Figure 1 is an interactive map, which shows single-site subnational estimates at a NUTS 2 level using weighted single-site Wave 18 to Wave 34 Business Insights and Conditions Survey (BICS) results. This covers the period 2 November 2020 to 11 July 2021.

#### Figure 1: Interactive map highlighting the impacts of the coronavirus (COVID-19) pandemic for Wave 18 to Wave 34 of BICS on single-site businesses only

Percentages of single-site businesses, broken down by region, UK, 2 November 2020 to 11 July 2021

#### Notes:

1. Weighted single-site estimates, Wave 18 to Wave 34 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. On furlough leave and Decrease in turnover: 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.
6. Data that have been removed for confidentiality reasons. This includes percentages less than 1%, breakdowns with a count of 10 or less, and breakdowns with a micro business count of 10 or less (a micro business has less than 10 employees).
7. Cash reserves have been omitted from Figure 1 as they were not included in Wave 34, but the data for Waves 18 to 33 are included in the [accompanying dataset](#).

#### Download the data

[.xlsx](#)

### 4 . Additional insights provided by analysing multi-site businesses

Until now, the subnational estimates produced by the Business Insights and Conditions Survey (BICS) have focused on a single-site methodology. This was done to avoid making assumptions about multi-site business' responses to survey questions, which may not necessarily be reflective of all sites spread across various countries or regions.

However, recent development has allowed experimental estimates to be produced for multi-site businesses broken down by country and by NUTS 1 level only. These can be found in the [accompanying datasets](#).

The multi-site approach currently uses a similar methodology used for BICS [unweighted regional results](#), which are published alongside the fortnightly [Business insights and impact on the UK economy and businesses](#) bulletin.

Using the final weighted BICS results, businesses are allocated to regions based on where a business has presence identified through information on local units listed on the [Inter-Departmental Business Register \(IDBR\)](#).

When a question is weighted by count, the weighted responses are not altered. However, for questions weighted by turnover or employment, the weighted responses are apportioned by the employment total in each local authority for that business.

Businesses that have a presence in more than one region will have a proportion of their weighted results present in each regional breakdown but will only be counted in the UK total once. This means the UK total for all sites matches the published final weighted headline figures.

All BICS subnational estimates should be treated with caution, as BICS results are weighted by industry and by size band but not by region. Regional results are produced by apportionment by region rather than weighting by region.

The [weighted estimates for Scotland for businesses with more than nine employees](#), which are available from the Scottish Government, use a different methodology to that presented in this article.

Data presented in Figures 2 to 4, show estimates on the measures of trading status, workforce status and financial performance for each of single-site businesses, multi-site businesses and all-businesses. They help explain how the presence of differing multi-site businesses in a region might impact the all businesses estimates within a particular region.

## Trading status

Figure 2 shows the impact of multi-site methodology on UK estimates for the percentage of businesses currently trading, which is weighted by count. Breakdowns by region can be found in the [accompanying datasets](#).

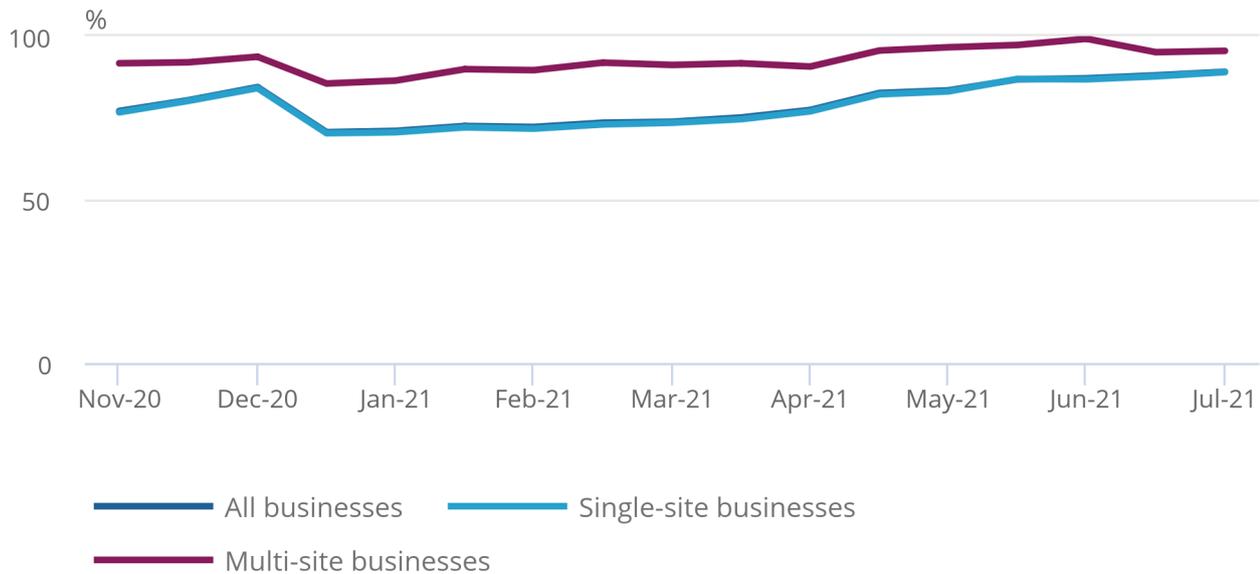
Weighted by count allows for representation of all businesses, and single-site businesses represent 98% of all businesses. Therefore, the all businesses percentages and single-site businesses percentages are closely aligned.

**Figure 2: Multi-site businesses have a consistently higher proportion of businesses currently trading than single-site businesses though gap is narrowing**

Currently trading, broken down by all businesses, single-site businesses and multi-site businesses, weighted by count, UK, 16 November 2020 to 11 July 2021

Figure 2: Multi-site businesses have a consistently higher proportion of businesses currently trading than single-site businesses though gap is narrowing

Currently trading, broken down by all businesses, single-site businesses and multi-site businesses, weighted by count, UK, 16 November 2020 to 11 July 2021



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

Notes:

1. Final weighted all UK site results, weighted single-site estimates and weighted multi-site estimates, Wave 18 to Wave 34 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.

The definition of currently trading used within the Business Insights and Conditions Survey (BICS) refers to the business currently trading in any capacity and is not the same as site closure. It does not cover whether a business has completely reopened to trading at full capacity as before the coronavirus (COVID-19) pandemic, or if the business is operating at a reduced level of capacity but is still trading. For example, a business’ site might be closed but if they are still trading through online sales they will still be considered to be currently trading.

**Workforce status**

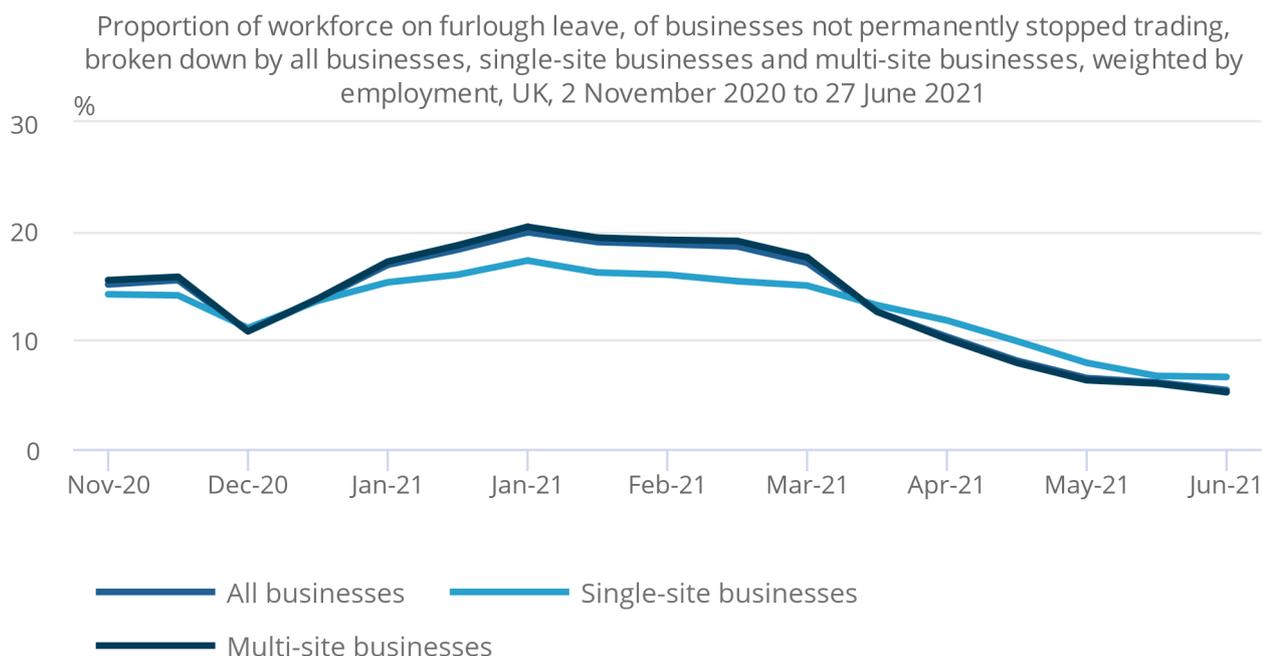
Figure 3 shows the impact of multi-site methodology on the UK estimates for the proportion of businesses’ workforce on furlough leave, which is weighted by employment. Breakdowns by region can be found in the [accompanying datasets](#).

Weighted by employment allows for representation of the UK economy, based on the number of employees within an industry and size band. Therefore, the all businesses proportions and the multi-site businesses proportions are closely aligned, as multi-site businesses tend to have a higher number of employees and therefore have higher weighting in results.

**Figure 3: The proportion of the workforce on furlough leave has been higher for single-site businesses than multi-site businesses since April, a trend that has reversed from previous months**

Proportion of workforce on furlough leave, of businesses not permanently stopped trading, broken down by all businesses, single-site businesses and multi-site businesses, weighted by employment, UK, 2 November 2020 to 27 June 2021

Figure 3: The proportion of the workforce on furlough leave has been higher for single-site businesses than multi-site businesses since April, a trend that has reversed from previous months



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

Notes:

1. Final weighted all UK site results, weighted single-site estimates and weighted multi-site estimates, Wave 18 to Wave 34 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.

## Financial performance

Figure 4 shows the impact of multi-site methodology on the UK estimates for the percentage of businesses experiencing a decrease in turnover, compared with normal expectations for this time of year, which is weighted by turnover. Breakdowns by region can be found in the [accompanying datasets](#).

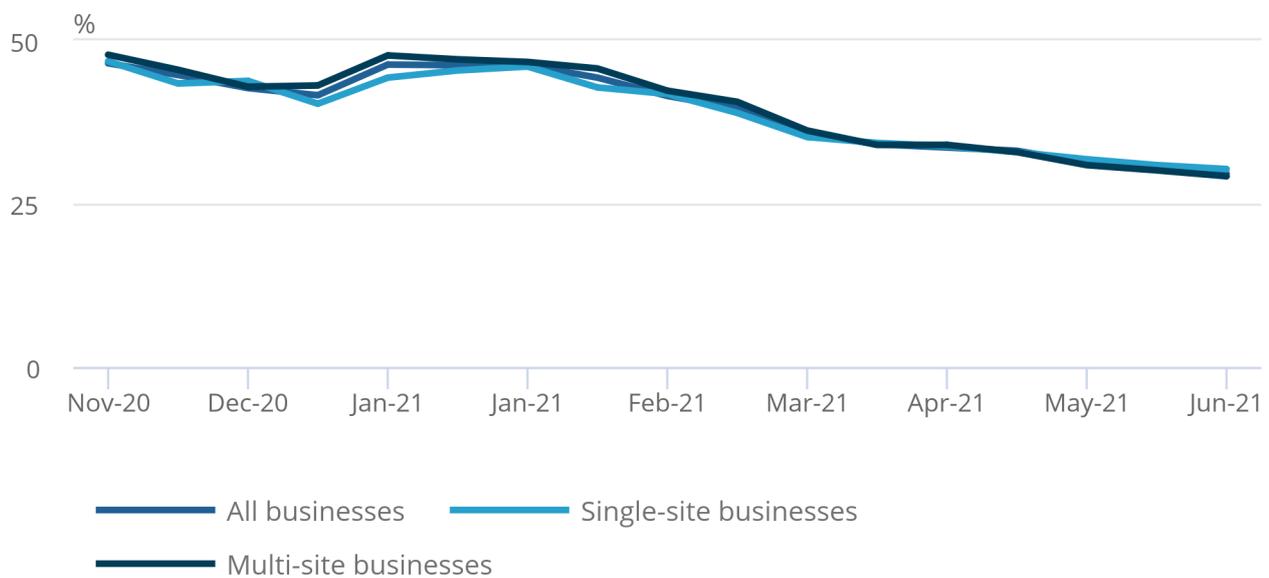
Weighted by turnover allows for representation of the UK economy, based on the turnover within an industry and size band. Single-site businesses represent approximately half of total UK turnover. Therefore, the all businesses percentages, single-site businesses percentages, and multi-site businesses percentages are closely aligned.

**Figure 4: The percentage of businesses experiencing a decrease in turnover is similar for both single-site and multi-site businesses with both seeing a steady decline over time**

Decrease in turnover compared with normal expectations for this time of year, businesses currently trading, broken down by all businesses, single-site businesses and multi-site businesses, weighted by turnover, UK, 2 November 2020 to 27 June 2021

Figure 4: The percentage of businesses experiencing a decrease in turnover is similar for both single-site and multi-site businesses with both seeing a steady decline over time

Decrease in turnover compared with normal expectations for this time of year, businesses currently trading, broken down by all businesses, single-site businesses and multi-site businesses, weighted by turnover, UK, 2 November 2020 to 27 June 2021



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

Notes:

1. Final weighted all UK site results, Weighted single-site estimates and Weighted multi-site estimates, Wave 18 to Wave 34 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.

## 5 . Trading status

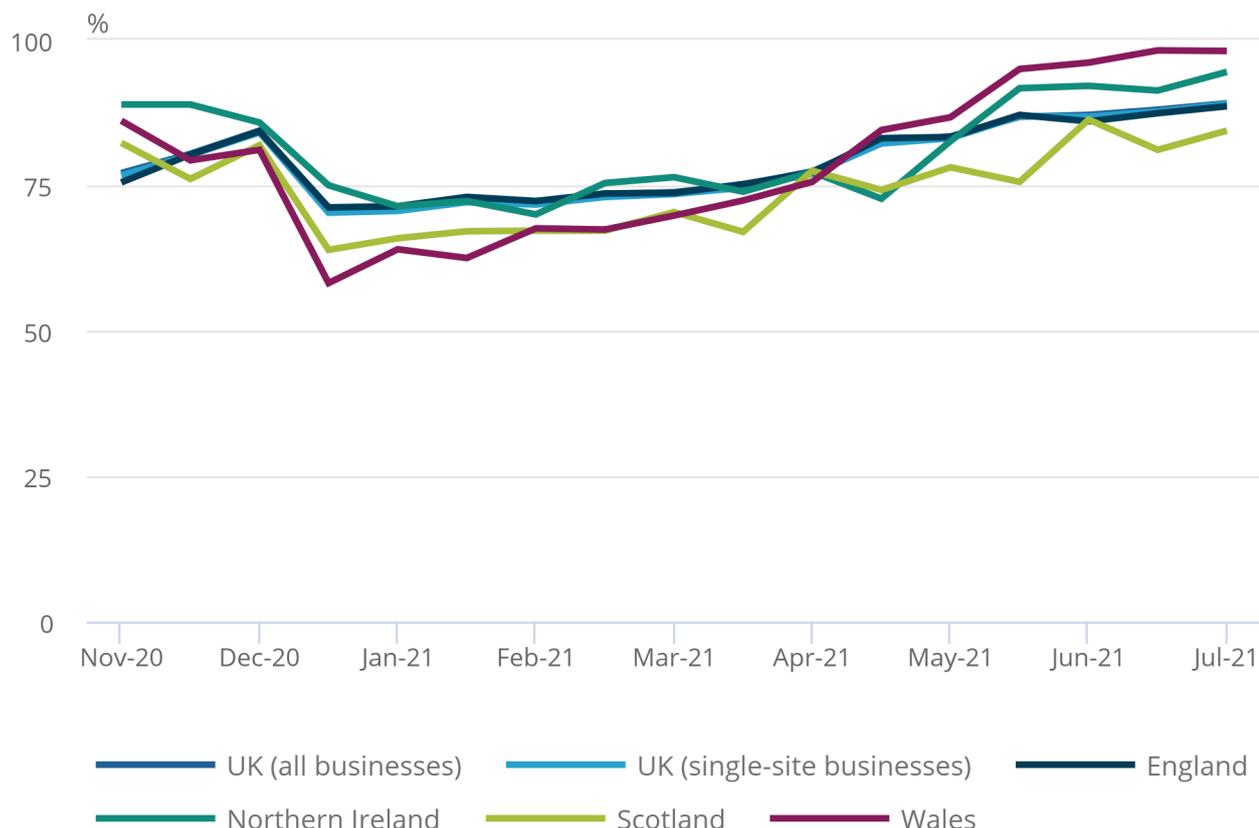
The following data are presented for single-site businesses only and represent all single-site businesses.

**Figure 5: Wales had the highest percentage of single-site businesses currently trading in early July 2021, at 98%**

Currently trading, all single-site businesses, broken down by country, weighted by count, UK, 16 November 2020 to 11 July 2021

Figure 5: Wales had the highest percentage of single-site businesses currently trading in early July 2021, at 98%

Currently trading, all single-site businesses, broken down by country, weighted by count, UK, 16 November 2020 to 11 July 2021



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

Notes:

1. Final weighted all UK site results and Weighted single-site estimates, Wave 18 to Wave 34 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.

Estimates based on the responses received in the BICS survey suggest that the number of single-site businesses currently trading in the UK increased from 83% in early May to 89% in early July 2021. This increase appears to be in line with coronavirus (COVID-19) restrictions continuing to ease across the country.

On a regional level, Northern Ireland was the country with the largest percentage point increase (12 percentage points) in single-site businesses currently trading between early May and early July 2021, with 95% of businesses in the region stating they were now trading.

England showed the smallest percentage point increase (5 percentage points) from early May to early July 2021, with 89% of businesses reporting they were now trading.

However, Scotland remains the region with the lowest percentage of single-site businesses currently trading at 84%. The percentage of single-site businesses currently trading in Scotland had risen to 86% in early June 2021 but has shown a slight decrease since.

### **Figure 6: North East had the highest percentage of single-site businesses currently trading in the services sector in early July 2021**

Currently trading, all single-site businesses, broken down by region and sector, weighted by count, UK, 28 June to 11 July 2021

#### **Notes:**

1. Weighted single-site estimates, Wave 34 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. "\*" represents data that has been removed for confidentiality reasons. This includes percentages less than 1%, breakdowns with a count of 10 or less, and breakdowns with a micro business count of 10 or less. (Micro business has less than 10 employees).

#### **Download the data**

[.xlsx](#)

Of the English regions, the North East has the highest percentage of single-site businesses currently trading and also had the biggest percentage point increase from early May 2021, increasing by 17 percentage points.

## **6 . Workforce**

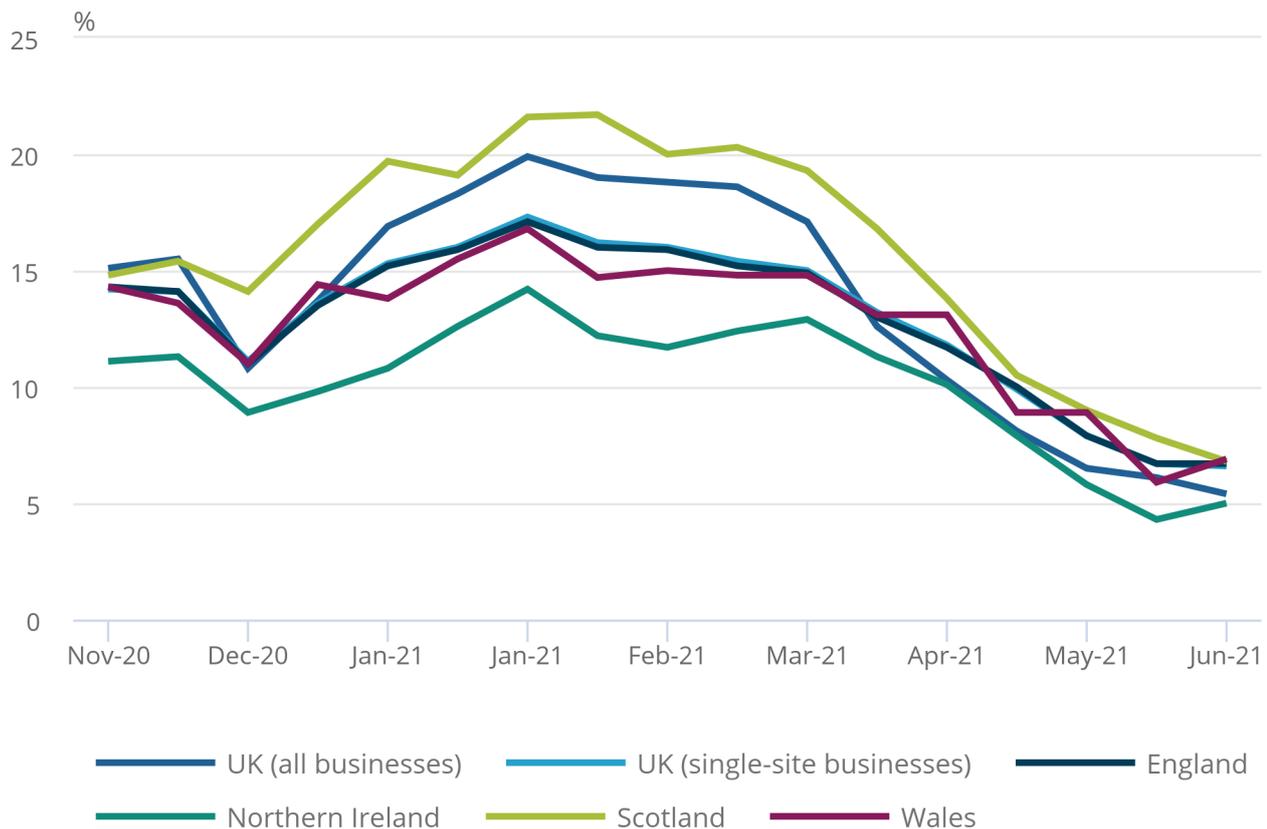
The following data are presented for single-site businesses only and represent single-site businesses not permanently stopped trading.

**Figure 7: Scotland has consistently had the highest proportion of its workforce on furlough leave since early November 2020 but is now at similar level to both England and Wales**

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 27 June 2021

Figure 7: Scotland has consistently had the highest proportion of its workforce on furlough leave since early November 2020 but is now at similar level to both England and Wales

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 27 June 2021



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

Notes:

1. Final weighted all UK site results and Weighted single-site estimates, Wave 18 to Wave 34 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 late April to late June 2021, as coronavirus (COVID-19) restrictions were relaxed.

- Scotland saw the largest fall, from 14% to 7%
- England saw the smallest fall, from 12% to 7%

At a UK level, the services sector fell from 14% of single-site businesses' workforce on furlough leave in late April to 8% in late June 2021.

**Figure 8: The South West had the lowest proportion of its single-site businesses' workforce on furlough leave in the services sector in late June 2021, at 5%**

Proportion of workforce on furlough leave, of single-site businesses not permanently stopped trading, broken down by region and sector, weighted by employment, UK, 14 to 27 June 2021

**Notes:**

1. Weighted single-site estimates, Wave 34 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. Businesses were asked for their experiences for the reference period 14 to 27 June 2021. However, for questions regarding the last two weeks, businesses may respond from the point of completion of the questionnaire (28 June to 11 July 2021).
4. "\*" represents data that has been removed for confidentiality reasons. This includes percentages less than 1%, breakdowns with a count of 10 or less, and breakdowns with a micro business count of 10 or less. (Micro business has less than 10 employees).

**Download the data**

[.xlsx](#)

## 7 . Financial performance

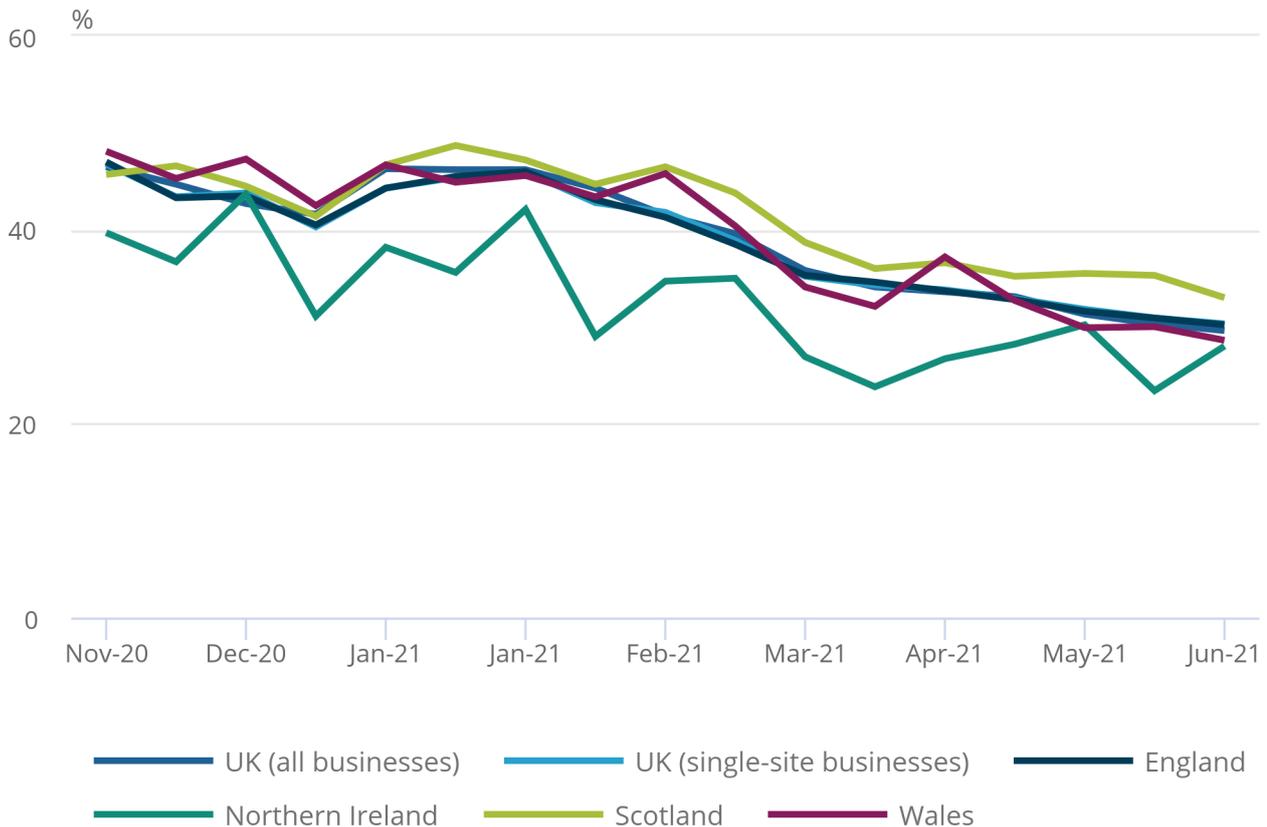
The following data are presented for single-site businesses only and represent single-site businesses currently trading. Additionally, the data are compared with normal expectations for this time of year.

**Figure 9: 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 27 June 2021

Figure 9: 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 27 June 2021



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

Notes:

1. Final weighted all UK site results and Weighted single-site estimates, Wave 18 to Wave 34 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.

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

- Wales saw the largest fall, from 37% to 29%
- Northern Ireland saw a small increase, from 27% to 28%

At a UK level, the services sector fell from 36% of single-site businesses experiencing a decrease in turnover in late April to 32% in late June 2021.

**Figure 10: Yorkshire and the Humber had the lowest percentage of single-site businesses experiencing a decrease in turnover in the services sector in late June 2021, at 28%**

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, 14 to 27 June 2021

**Notes:**

1. Weighted single-site estimates, Wave 34 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. Businesses were asked for their experiences for the reference period 14 to 27 June 2021. However, for questions regarding the last two weeks, businesses may respond from the point of completion of the questionnaire (28 June to 11 July 2021).
4. "\*" represents data that has been removed for confidentiality reasons. This includes percentages less than 1%, breakdowns with a count of 10 or less, and breakdowns with a micro business count of 10 or less. (Micro business has less than 10 employees)

**Download the data**

[.xlsx](#)

## 8 . Business impacts of national and local restrictions data

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

Dataset | Released 20 July 2021

Experimental subnational estimates from the voluntary fortnightly Business Insights and Conditions Survey (BICS) on topics such as trading status, financial performance, workforce and business resilience.

Geographical breakdowns include country, regional and local authority levels.

## 9 . 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.

## 10 . 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, single-site businesses and multi-site businesses for Waves 31, 32, 33 and 34 of the Business Insights and Conditions Survey

Wave	Wave 34	Wave 33	Wave 32	Wave 31
<b>All businesses sample</b>	38,573	38,621	38,672	38,752
<b>All businesses rate</b>	23.5%	25.0%	23.3%	24.4%
<b>Single-site businesses sample</b>	27,031	27,064	27,106	27,157
<b>Single-site businesses rate</b>	21.2%	22.6%	21.2%	22.0%
<b>Multi-site businesses sample</b>	11,542	11,557	11,566	11,595
<b>Multi-site businesses rate</b>	28.7%	30.5%	28.1%	29.8%

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

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

## 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 subnational BICS article](#) outline 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). 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.

## 11 . Related links

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

Bulletin | Updated fortnightly

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 \(BICS\) QMI](#)

Methodology | Released 20 May 2021

Quality and methodology information for the Business Insights and Conditions Survey, detailing the strengths and limitations of the data, methods used and data uses and users.

### [Coronavirus \(COVID-19\) harmonisation guidance](#)

Webpage | Updated frequently

Harmonisation guidance on how to best to collect data about the impact of the coronavirus (COVID-19) pandemic. Includes a bank of questions from multiple Office for National Statistics (ONS) coronavirus-related surveys, and information about what data the ONS has relating to the coronavirus pandemic.

### [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).

### [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 HM Revenue and Customs' (HMRC's) Coronavirus Job Retention Scheme statistics, over the period 23 March 2020 to 7 February 2021.