

Article

Understanding the business impacts of local and national restrictions, UK: February 2022

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 and regional levels.

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1 . Main points

- Between late July 2021 and late January 2022, the percentage of single-site businesses reporting they are currently trading has increased in three of the four UK countries, with Wales remaining broadly stable; in late January 2022, of all UK nations, Wales and Northern Ireland reported the highest proportion of single-site businesses currently trading, at 97%.
- Between late June 2021 and mid-January 2022, Wales and Scotland saw a rise of 11 and 5 percentage points respectively in the proportion of currently trading single-site businesses reporting a decrease in turnover, while the proportion for the UK average remained broadly stable; over the same period there was a more positive trend among multi-site businesses, with the proportion reporting a decrease in turnover across the UK falling from 36% to 22%.
- In late January 2022, across all UK single-site businesses not permanently stopped trading, 36% reported cash reserves of three months or less, with Northern Ireland reporting the highest percentage, at 51%; in contrast 43%, 36%, and 30% of single-site businesses in Wales, England, and Scotland reported having three months or less of cash reserves, respectively.
- In mid-January 2022, of all UK countries, businesses not permanently stopped trading in England reported the highest percentage of their workforce either working from home or using a hybrid model of working, at 32%, with London seeing the highest proportion of any region in the UK at 50%.
- There are interactive maps in Sections [3](#), [4](#) and [5](#) which allow users to explore how business impacts differ by geography, based on Wave 18 to Wave 49 weighted single-site estimates.

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. It predominately focuses on Wave 35 to Wave 49 of BICS (28 June 2021 to 6 February 2022), covering the period since the last edition of this article.

Most of the subnational insights are based on those UK businesses that have a single business site only. Overall, single-site businesses represent approximately 98% of all businesses, and approximately half of total UK turnover and employment. Details on the single-site sample and methodology can be found in [Section 7](#) and in our [first subnational BICS article](#).

However, in addition to single-site subnational estimates, we also provide multi-site subnational estimates. The multi-site methodology can be found in the [July 2021 edition of Understanding the business impacts of local and national restrictions](#) and further detail behind these estimates is presented in our accompanying dataset.

All current BICS subnational estimates should be treated as experimental estimates and caution is advised when interpreting the figures as BICS results are weighted by industry and by size band but not by region. Multi-site regional results are produced by apportionment by region rather than weighted by region.

The make-up of single-site businesses that responded within a certain region and wave can have an impact on subnational BICS estimates. This should be considered when interpreting results. Details of the make-up of single-site businesses can be found in the [accompanying dataset](#).

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.

Please note, as part of our regular and ongoing quality assessment of our methods, we introduced improved methods to the weighting of smaller businesses within the BICS sample where we use employment and turnover to do so (first published [26 August 2021](#)). In the main, previous findings remained unaffected, but there are revisions to estimates for certain variables, including turnover, business resilience and workforce proportions.

3 . Trading status

Figure 1: Interactive map, which shows single-site subnational currently trading estimates at International Territorial Level (ITL) 2 level

Currently trading, single-site businesses, weighted by count, broken down by region, UK, 16 November 2020 to 6 February 2022

Notes:

1. Weighted single-site estimates, Wave 18 to Wave 49 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Data have been removed for confidentiality reasons. This includes percentages under 1%, breakdowns with a count of 10 or fewer, and breakdowns with a micro business count of 10 or fewer (a micro business has fewer than 10 employees).

Download the data

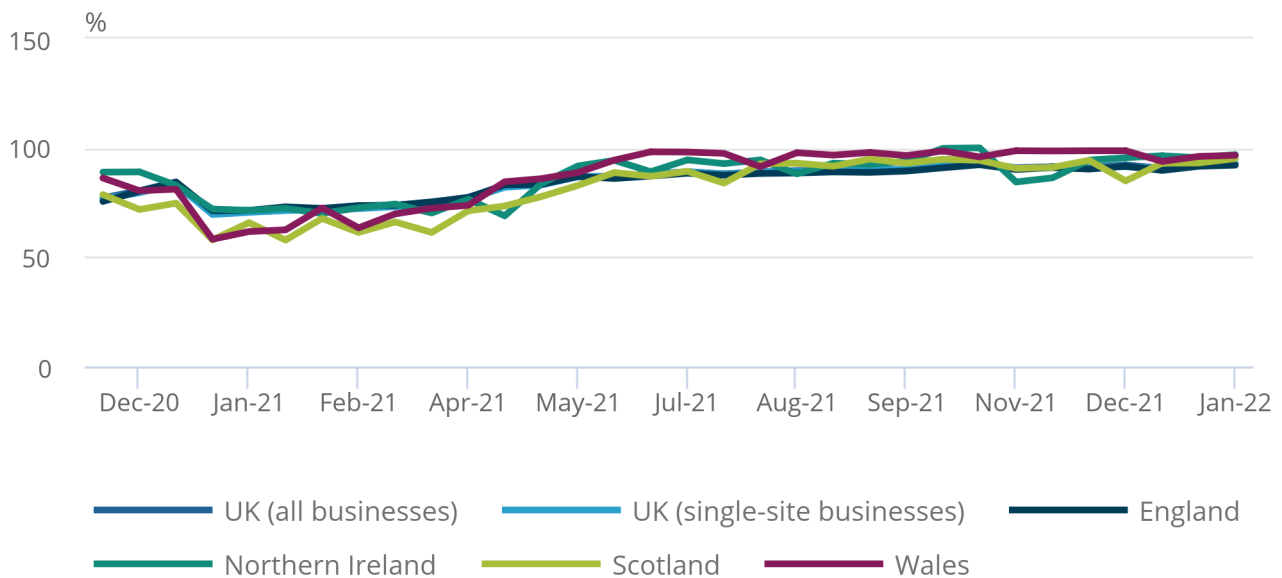
[.xlsx](#)

Figure 2: Three of the four UK countries reported a higher proportion of single-site businesses currently trading in late-January 2022 compared with early-July 2021

Currently trading, all single-site businesses, broken down by country, weighted by count, UK, 16 November 2020 to 6 February 2022

Figure 2: Three of the four UK countries reported a higher proportion of single-site businesses currently trading in late-January 2022 compared with early-July 2021

Currently trading, all single-site businesses, broken down by country, weighted by count, UK, 16 November 2020 to 6 February 2022



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 49 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Response rates vary across countries and between waves. Low response can affect the interpretation of these estimates.

In late January 2022, 93% of single-site businesses reported they were currently trading. This is an increase from 89% in early July 2021. Scotland reported the largest percentage point increase (6 percentage points) in single-site businesses currently trading during the same period with 95% of businesses in the region reporting they were currently trading in late January 2022.

Wales and Northern Ireland were the regions with the highest proportion of single-site businesses reporting they were currently trading in late January 2022, at 97%. England had the lowest proportion of single-site businesses reporting they were currently trading at 92% despite a 4-percentage point increase from early July 2021.

Wales reported the highest proportion of partially trading single-site businesses, at 17%, in contrast to the UK single-site average of 11%.

Figure 3: Northern Ireland and Wales reported the highest percentage of single-site businesses currently trading in late January 2022

Currently trading, all single-site businesses, broken down by region and sector, weighted by count, UK, 24 January to 6 February 2022

Notes:

1. For quality purposes, all industries have been collated to construction and production (production including: 2-digit SIC 5 to 29, inclusive), and services (including: 2-digit SIC 45 to 98, inclusive).
2. “*” represents data that have been removed for confidentiality reasons. This includes percentages under 1%, breakdowns with a count of 10 or fewer, and breakdowns with a micro business count of 10 or fewer. (Micro business has fewer than 10 employees).

Download the data

[.xlsx](#)

Of the English regions, the East of England, the East Midlands and West Midlands had the highest percentage of single-site businesses in the services sector reporting they are currently trading at 94%. The North East reported the lowest proportion for service sector businesses now trading at 87%, a 13 percentage point fall from early July 2021.

In the joint construction and production sectors, only 72% of single-site businesses in the West Midlands reported they were currently trading, 17 percentage points below the next lowest proportion. In Northern Ireland, Yorkshire and The Humber, the South West and the East Midlands, 100% of construction and production sector businesses reported they were currently trading.

4 . Financial performance

Figure 4: Interactive map, showing estimates of percentages of single-site businesses experiencing a decrease in turnover at International Territorial Level (ITL 2) level

Decrease in turnover compared with normal expectations for this time of year, single-site businesses currently trading, weighted by count, broken down by region, UK, 2 November 2020 to 23 January 2022

Notes:

1. Weighted single-site estimates, Wave 18 to Wave 49 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Data have been removed for confidentiality reasons. This includes percentages under 1%, breakdowns with a count of 10 or fewer, and breakdowns with a micro business count of 10 or fewer (a micro business has fewer than 10 employees).
3. Businesses were asked for their experience for the reference period, however, they may respond from the point of completion of the questionnaire.

Download the data

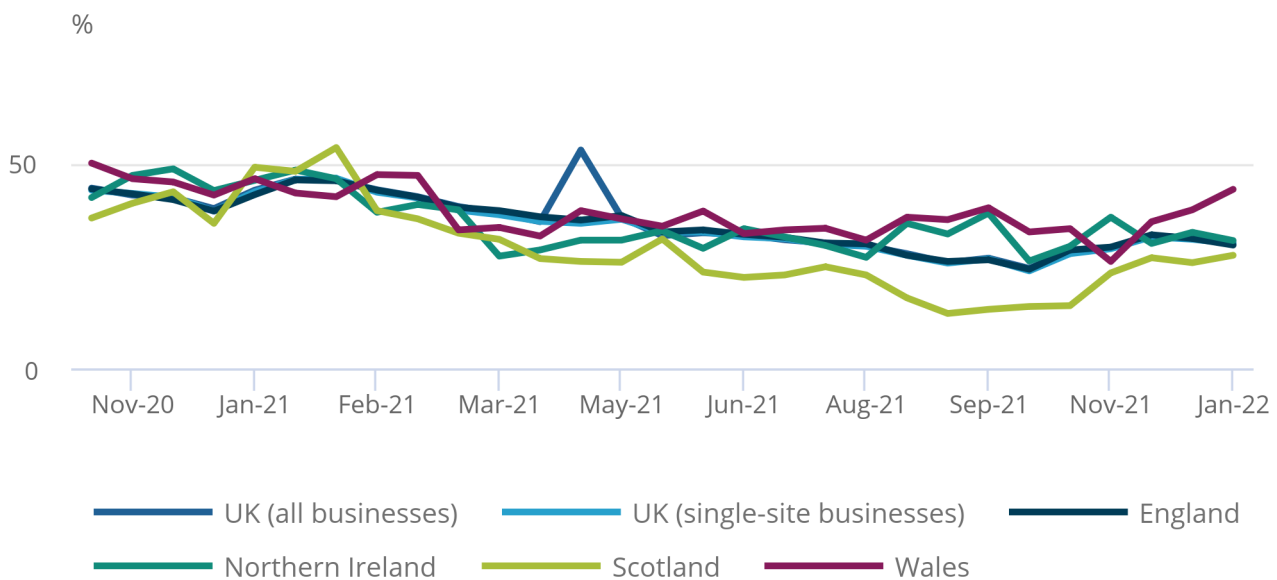
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Figure 5: Wales saw an 11-percentage point rise in single-site businesses reporting a decrease in turnover between late June 2021 and mid-January 2022

Decrease in turnover compared with normal expectations for this time of year, single-site businesses currently trading, broken down by country, weighted by count, UK, 2 November 2020 to 23 January 2022

Figure 5: Wales saw an 11-percentage point rise in single-site businesses reporting a decrease in turnover between late June 2021 and mid-January 2022

Decrease in turnover compared with normal expectations for this time of year, single-site businesses currently trading, broken down by country, weighted by count, UK, 2 November 2020 to 23 January 2022



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 49 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Response rates vary across countries and between waves. Low response can affect the interpretation of these estimates.
3. Businesses were asked for their experience for the reference period, however, they may have responded from the point of completion of the questionnaire.

In mid-January 2022, across all UK currently trading single-site businesses, the following percentages were reported for turnover over the last two weeks compared with normal expectations for this time of year:

- 31% indicated a decrease in turnover, broadly stable since late June 2021
- 50% experienced no impact on turnover, up from 46% in late June 2021
- 6% suggested an increase in turnover, down from 8% in late June 2021
- 13% were not sure, broadly stable since late June 2021

Wales reported the highest percentage of single-site businesses experiencing a decrease in turnover and saw the largest percentage point increase of all regions between late June 2021 and mid-January 2022, from 33% to 44%. In the intervening period the percentage fell to a low of 26%, in late November 2021.

Scotland experienced a 14 percentage point increase in single-site businesses reporting a decrease in turnover between late August 2021 and mid-January 2022, from 13% to 28%. Scotland remains the UK country with the lowest proportion of businesses reporting a decrease in turnover but is now close to the UK single-site average.

Figure 6: Wales and the West Midlands reported the highest percentage of single-site businesses reporting a decrease in turnover in mid-January 2022

Decrease in turnover compared with normal expectations for this time of year, single-site businesses currently trading, broken down by country and sector, weighted by count, UK, 10 January to 23 January 2022

Notes:

1. For quality purposes, all industries have been collated to construction and production (production including: 2-digit SIC 5 to 29, inclusive), and services (including: 2-digit SIC 45 to 98, inclusive).
2. Businesses were asked for their experiences for the reference period 10 January to 23 January 2022. However, for questions regarding the last two weeks, they may respond from the point of completion of the questionnaire (24 January to 6 February 2022).
3. “**” represents data that have been removed for confidentiality reasons. This includes percentages under 1%, breakdowns with a count of 10 or fewer, and breakdowns with a micro business count of 10 or fewer. (Micro business has fewer than 10 employees).

Download the data

[.xlsx](#)

Among the English regions, of businesses currently trading in mid-January 2022, the West Midlands reported the highest percentage of businesses reporting a decrease in turnover, at 40%.

The services sector within Wales reported the highest proportion of single-site businesses experiencing a decrease in turnover of any sector in any region, at 46%. The South West was the region that reported the lowest (26%) proportion of businesses reporting a decrease in turnover with this falling to 24% for the services sector.

In contrast, the South West had the highest proportion of businesses reporting a decrease in turnover in the joint construction and production sectors at 34%.

5 . Cash reserves

Figure 7: Interactive map, which shows single-site subnational estimates for less than three months cash reserves at International Territorial Level (ITL) 2 level

Less than three months cash reserves, single-site businesses not permanently stopped trading, broken down by region, weighted by count, UK, 16 November 2020 to 6 February 2022

Notes:

1. Weighted single-site estimates, Wave 18 to Wave 49 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Data have been removed for confidentiality reasons. This includes percentages under 1%, breakdowns with a count of 10 or fewer, and breakdowns with a micro business count of 10 or fewer (a micro business has fewer than 10 employees).

Download the data

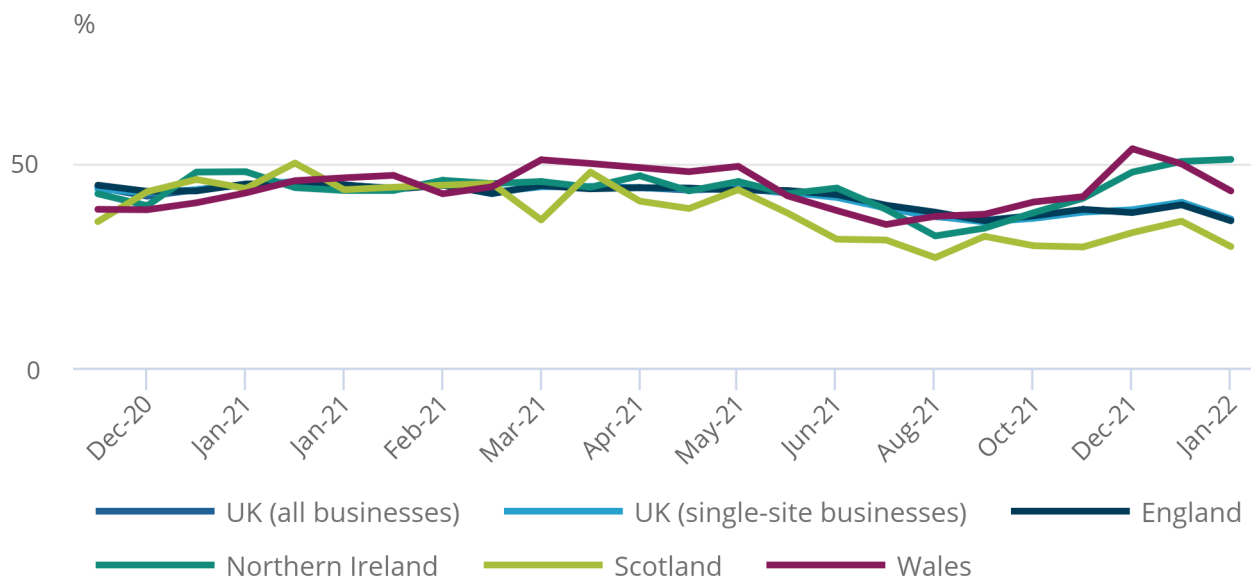
[.xlsx](#)

Figure 8: Over half of single-site businesses in Northern Ireland reported having less than three months cash reserves in late January

Cash reserves of between zero and three months, percentage of single-site businesses not permanently stopped trading, weighted by count, UK, 16 November 2020 to 6 February 2022

Figure 8: Over half of single-site businesses in Northern Ireland reported having less than three months cash reserves in late January

Cash reserves of between zero and three months, percentage of single-site businesses not permanently stopped trading, weighted by count, UK, 16 November 2020 to 6 February 2022



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 49 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Response rates vary across countries and between waves. Low response can affect the interpretation of these estimates.
3. Cash reserve categories between zero and three months have been combined for quality purposes.

In late January 2022, across all UK single-site businesses:

- 10% reported no cash reserves
- 5% reported less than one month of cash reserves
- 22% reported between one and three months of cash reserves
- 13% reported between four and six months of cash reserves
- 29% reported more than six months of cash reserves
- 21% were not sure

Northern Ireland and Wales both experienced an increase in single-site businesses reporting three months or fewer in cash reserves from late July 2021 to late January 2022, while England and Scotland experienced a decrease. The biggest increase was for Northern Ireland, up 12 percentage points over this time period.

Of single-site businesses not permanently stopped trading, Northern Ireland reported the highest proportion of businesses with three months or less cash reserves at 51%, in late January 2022. Wales had maintained reporting the highest or joint highest proportion since early September 2021, but this changed as it reported a 7 percentage point decrease in businesses with three months or less cash reserves, between early and late January 2022.

The country with the lowest proportion reporting cash reserves of three months or less in late January 2022 was Scotland, at 30%. Scotland has had the lowest proportion since early June 2021 and reported as low as 27% in mid-August 2021.

Figure 9: The South West was the region in England that reported the highest percentage of businesses having less than three months cash reserves in late January 2022, at 44%

Cash reserves of between zero and three months, percentage of single-site businesses not permanently stopped trading, broken down by country and sector, weighted by count, UK, 24 January 2022 to 6 February 2022

Notes:

1. 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).
2. “*” represents data that have been removed for confidentiality reasons. This includes percentages under 1%, breakdowns with a count of 10 or fewer, and breakdowns with a micro business count of 10 or fewer. (Micro business has fewer than 10 employees).
3. Cash reserve categories between zero and three months have been combined for quality purposes.

Download the data

[.xlsx](#)

The joint construction and production sector in Northern Ireland reported 65% of single-site businesses having three months or less cash reserves, which was the highest of any region by 16 percentage points.

The East Midlands had the lowest proportion of single-site businesses reporting cash reserves of three months or less in both the service sector and the joint construction and production sectors, at 21% and 16% respectively.

6 . Workforce status

Figure 10: London single-site businesses in the services sector estimated over half of their workforce were working from home or using a hybrid working model in mid-January 2022

Workforce working from home or using a hybrid model of working, percentage of single-site businesses not permanently stopped trading, broken down by country and sector, weighted by employment, UK, 10 to 23 January 2022

Notes:

1. 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).
2. “*” represents data that have been removed for confidentiality reasons. This includes percentages under 1%, breakdowns with a count of 10 or fewer, and breakdowns with a micro business count of 10 or fewer. (Micro business has fewer than 10 employees).
3. For presentational purposes, response options have been combined.

Download the data

[.xlsx](#)

In mid-January 2022, it was estimated that 29% of UK single-site businesses' employees were either working from home or using a hybrid model of working. England was the country with the highest proportion reported, at 32%, while the lowest proportion reported was 18% in Wales.

Across all sectors London estimated a much higher proportion of the workforce working from home or using a hybrid working model than other regions, with the proportion at 50% for all industries.

In the services sector, single-site businesses in Scotland reported a 6 percentage point increase in working from home or using a hybrid model between late October 2021 (the first Business Insights and Conditions Survey (BICS) wave after the end of the government's furlough scheme) and mid-January 2022. Northern Ireland and Wales reported a decrease in working from home or using a hybrid model in the services sector, of 3 percentage points each.

7 . Business impacts of local and national restrictions data

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

Dataset | Released 17 February 2022

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 and, regional 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.

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, single-site businesses and multi-site businesses for Waves 47, 48 and 49 of the Business Insights and Conditions Survey

Wave	Wave 47	Wave 48	Wave 49
All businesses sample	38,865	38,590	38,413
All businesses rate	19.7%	24.3%	22.4%
Single-site businesses sample	27,442	27,215	27,082
Single-site businesses rate	18.5%	22.6%	21.5%
Multi-site businesses sample	11,423	11,375	11,331
Multi-site businesses rate	22.6%	28.5%	24.7%

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

Notes

1. 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 Insights and Conditions 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 [International Territorial Level \(ITL 1\)](#) 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 all businesses sample.

Measuring the data

The Business Insights and Conditions Survey (BICS) is voluntary and may only reflect the characteristics of those that responded.

More quality and methodology information on strengths, limitations, appropriate uses, and how the data were created is available in the [Business Insights and Conditions Survey \(BICS\) QMI](#), updated on 24 January 2022.

10 . Related links

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

Article | Released 2 September 2021

An overview of the similarities and differences between the fortnightly Business Insights and Conditions Survey (BICS) furlough estimates and HMRC's Coronavirus Job Retention Scheme statistics, over the period 23 March 2020 to 30 June 2021.

[COVID-19 question bank](#)

Webpage | Updated frequently

This webpage provides a bank of questions from multiple Office for National Statistics (ONS) surveys related to coronavirus (COVID-19) to be used in other surveys to further support harmonisation and questionnaire development. This bank also provides users with an understanding of what data the ONS have in relation to the coronavirus pandemic.

[Business and individual attitudes towards the future of homeworking, UK: April to May 2021](#)

Article | Released 14 June 2021

Analysis of the effects of the coronavirus pandemic on office working and of business and individual attitudes to future working practices.

[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 businesses' 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).