

Article

# Business insights and impact on the UK subnational single-site economy: November 2025

Estimates from the voluntary fortnightly business survey (BICS) on financial performance, prices and workforce. These are official statistics in development.

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# 1 . Main points

- More than one in six (18%) trading UK single-site businesses reported that their turnover was higher in September 2025 compared with the previous calendar month; the South East had the highest proportion of any nation or region (20%) while Northern Ireland had the lowest (13%).
- A quarter (25%) of trading UK single-site businesses reported that their turnover had decreased in September 2025 compared with the previous calendar month; Northern Ireland had the highest proportion of any nation or region (28%) while London had the lowest (21%).
- Between September 2024 and September 2025, all nations saw an increase in the proportion of single-site businesses that reported that the prices of goods and services bought had increased compared with the previous month; Northern Ireland had the largest rise during this period (19% to 24%), while Wales had the smallest (19% to 21%).
- 8% of UK single-site businesses reported that the prices of goods or services sold in September 2025 had increased compared with the previous month; the North West had the highest proportion of any nation or region (11%).
- 8% of UK single-site businesses experienced worker shortages in early October 2025; the South West and the West Midlands had the joint highest proportions of any nation or region (11%).

These are [official statistics in development](#), and we advise caution when using the data. The Business Insights and Conditions Survey (BICS) questions and topics are regularly reviewed, and questions are often added, removed, or amended to reflect changing circumstances and analytical priorities.

## 2 . Overview

The data presented in this article are weighted single-site estimates from Wave 118 to Wave 142 of the Office for National Statistics' [Business Insights and Conditions Survey \(BICS\)](#), which covers the period September 2024 to September 2025. For some questions, businesses were asked for their experiences for the survey live period. However, other questions ask specifically about the most recent calendar month in relation to the time of completion.

The BICS subnational release focuses on a single-business-site approach to be reflective of sites spread across various geographies. Single-site businesses represent approximately 98% of all businesses and approximately half of total UK turnover and employment. BICS does not cover all sectors of the economy and only includes private sector businesses.

The data reported are subject to [uncertainty](#), for example, sampling variability and [non-sampling error](#). This means that the characteristics of single-site businesses that responded within a certain region and wave can have an impact on subnational BICS estimates. Further information on quality is available in our [Business Insights and Conditions Survey quality and methodology information \(QMI\)](#) and we regularly update [confidence intervals](#) associated with the survey questions.

## 3 . Financial performance

Businesses were asked how their turnover compared with the previous calendar month.

### Figure 1: Interactive map showing single-site subnational estimates at International Territorial Level 1

Decrease in turnover compared with the previous calendar month, single-site businesses currently trading, weighted by count, broken down by nation and region, UK, 1 September 2024 to 30 September 2025

**Notes:**

1. Weighted single-site estimates, Wave 118 to 142 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Data have been removed for confidentiality reasons. This includes percentages fewer than 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. For presentational purposes, some data points have been removed.

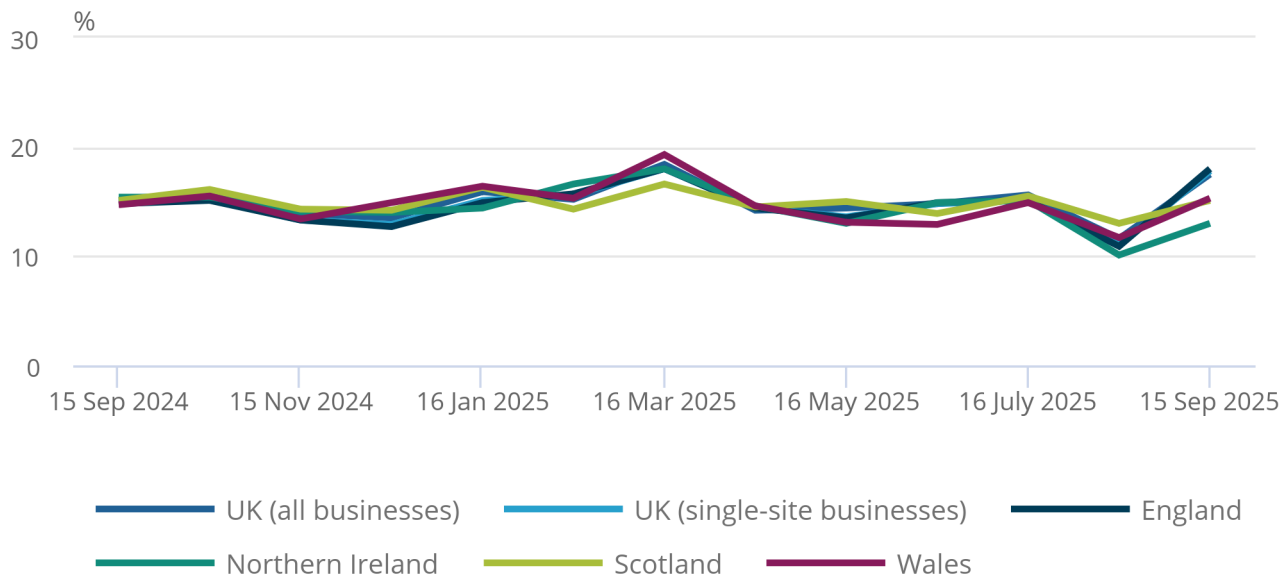
**Download the data**

**Figure 2: More than one in six (18%) UK single-site businesses reported that their turnover had increased in September 2025 compared with the previous calendar month**

Increase in turnover compared with the previous month, single-site businesses currently trading, broken down by nation, weighted by count, UK, 1 September 2024 to 30 September 2025

Figure 2: More than one in six (18%) UK single-site businesses reported that their turnover had increased in September 2025 compared with the previous calendar month

Increase in turnover compared with the previous month, single-site businesses currently trading, broken down by nation, weighted by count, UK, 1 September 2024 to 30 September 2025



Source: Business Insights and Conditions Survey from the Office for National Statistics

Notes:

1. Final weighted all UK site results and weighted single-site estimates, Wave 118 and 142 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Response rates vary across nations and between waves. Low response can affect the interpretation of these estimates.
3. Data are plotted in the middle of the period of each wave.

In September 2025, 18% of trading UK single-site businesses reported that their turnover was higher than the previous month, up 3 percentage points when compared with September 2024.

The proportion of trading UK single-site businesses reporting that their turnover was higher than the previous month peaked in March 2025 (18%) before falling to the lowest proportion ever recorded in August 2025 (11%). However, this was immediately followed by an increase of 7 percentage points in September 2025. While this trend was broadly followed by all UK nations, the difference in proportions between nations is wider than in September 2024.

The South East of England (20%) reported the highest proportion across all regions and nations in the UK and also saw the largest increase from September 2024 (15%).

Conversely, Northern Ireland (13%) had the lowest proportion of single-site businesses that reported that their turnover was higher than the previous month in September 2025, down 2 percentage points from September 2024.

## Turnover decreased

The proportion of single-site businesses that reported their turnover was lower than the previous month was broadly stable in September 2025 when compared with September 2024 for most UK nations. The exception was Northern Ireland, which rose 4 percentage points from September 2024, to 28%.

Yorkshire and The Humber was the English region that had the highest proportion of single-site businesses that experienced a decrease in turnover in September 2025, at 28%. The West Midlands (27%) reported an increase of 5 percentage points between September 2024 and September 2025, the largest movement of any region.

## 4 . Prices

### Prices bought

#### Figure 3: Interactive map showing single-site subnational estimates at International Territorial Level 1

Prices bought increased, single-site businesses not permanently stopped trading, weighted by count, broken down by nation and region, UK, 1 September 2024 to 30 September 2025

#### Notes:

1. Weighted single-site estimates, Wave 118 to 142 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Data have been removed for confidentiality reasons. This includes percentages fewer than 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).
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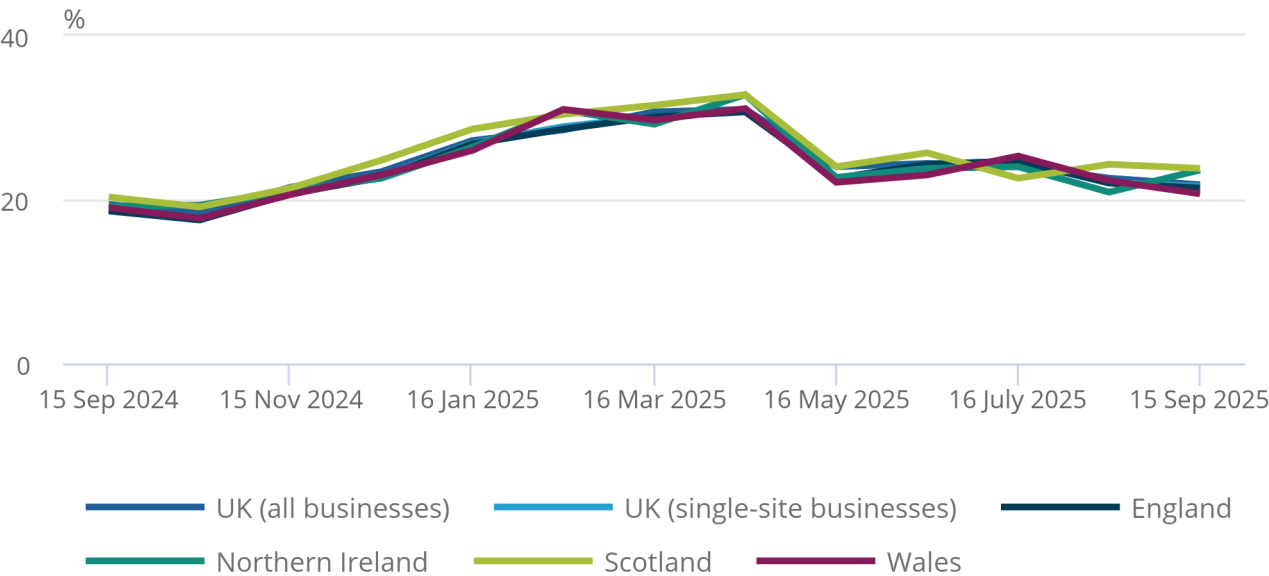
**Download the data**

**Figure 4: More than one in five (22%) UK single-site businesses reported an increase in the prices of goods or services bought in September 2025 compared with August 2025**

Prices bought increased, single-site businesses not permanently stopped trading, broken down by nation, weighted by count, UK, 1 September 2024 to 30 September 2025

Figure 4: More than one in five (22%) UK single-site businesses reported an increase in the prices of goods or services bought in September 2025 compared with August 2025

Prices bought increased, single-site businesses not permanently stopped trading, broken down by nation, weighted by count, UK, 1 September 2024 to 30 September 2025



Source: Business Insights and Conditions Survey from the Office for National Statistics

Notes:

1. Final weighted all UK site results and weighted single-site estimates, Wave 118 and 142 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Response rates vary across nations and between waves. Low response can affect the interpretation of these estimates.
3. Data are plotted in the middle of the period of each wave.

The proportion of UK single-site businesses that reported an increase in the prices of goods or services they bought compared with the previous month increased steadily from October 2024 (18%) until April 2025, where it peaked at 31%. This was followed by a fall of 8 percentage points in May 2025 (23%) and has remained broadly stable since. This trend has been followed by all UK nations, while the proportions for each UK nation have remained consistent with the UK single-sites proportion.

The West Midlands and the South East (24%) were the regions with the joint highest proportion of single-site businesses that reported an increase in the prices of goods or services they bought in September 2025 compared with the previous month. The West Midlands also reported the largest increase of any region between September 2024 (18%) and September 2025. Conversely, London saw the lowest proportion in September 2025 (18%) and was broadly stable when compared with September 2024.

## Prices sold

### Figure 5: Interactive map showing single-site subnational estimates at International Territorial Level 1

Prices sold increased, single-site businesses not permanently stopped trading, weighted by count, broken down by nation and region, UK, 1 September 2024 to 30 September 2025

#### Notes:

1. Weighted single-site estimates, Wave 118 to 142 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Data have been removed for confidentiality reasons. This includes percentages fewer than 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. For presentational purposes, some data points have been removed.

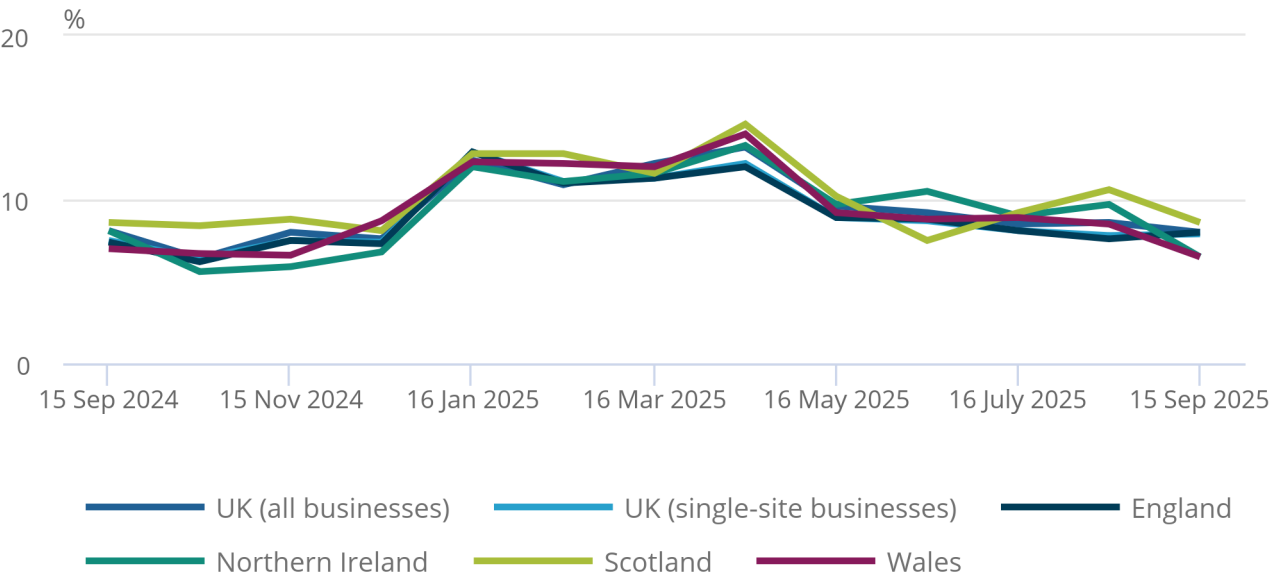
**Download the data**

**Figure 6: Approximately 1 in 12 (8%) UK single-site businesses reported an increase in the prices of goods or services sold in September 2025 compared with August 2025**

Prices sold increased, single-site businesses not permanently stopped trading, broken down by nation, weighted by count, UK, 1 September 2024 to 30 September 2025

Figure 6: Approximately 1 in 12 (8%) UK single-site businesses reported an increase in the prices of goods or services sold in September 2025 compared with August 2025

Prices sold increased, single-site businesses not permanently stopped trading, broken down by nation, weighted by count, UK, 1 September 2024 to 30 September 2025



Source: Business Insights and Conditions Survey from the Office for National Statistics

Notes:

1. Final weighted all UK site results and weighted single-site estimates, Wave 118 and 142 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Response rates vary across nations and between waves. Low response can affect the interpretation of these estimates.
3. Data are plotted in the middle of the period of each wave.

The proportion of UK single-site businesses that reported an increase in the prices of goods or services they sold compared with the previous month remained broadly stable from September 2024 to December 2024 before increasing by 6 percentage points and peaking in January 2025 (13%). This proportion remained broadly stable until May 2025 where it fell by 3 percentage points and has remained broadly stable since.

When comparing September 2024 and September 2025, the proportion of UK single-site businesses that reported an increase in the prices of goods or services they bought compared with the previous month remained broadly stable for all UK nations.

The North West was the region with the highest proportion of single-site businesses that reported an increase in the prices of goods or services they sold in September 2025 compared with the previous month. It also reported the largest increase of any region between September 2024 and September 2025, up 3 percentage points to 11%.

## 5 . Worker shortages

Businesses not permanently stopped trading in the UK were asked if they were experiencing a shortage of workers.

### **Figure 7: Interactive map showing single-site subnational estimates at International Territorial Level 1**

**Experiencing worker shortages, single-site businesses not permanently stopped trading, weighted by count, broken down by nation and region, UK, 7 October 2024 to 19 October 2025**

#### **Notes:**

1. Weighted single-site estimates, Wave 118 to 142 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Data have been removed for confidentiality reasons. This includes percentages fewer than 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. For presentational purposes, some data points have been removed.

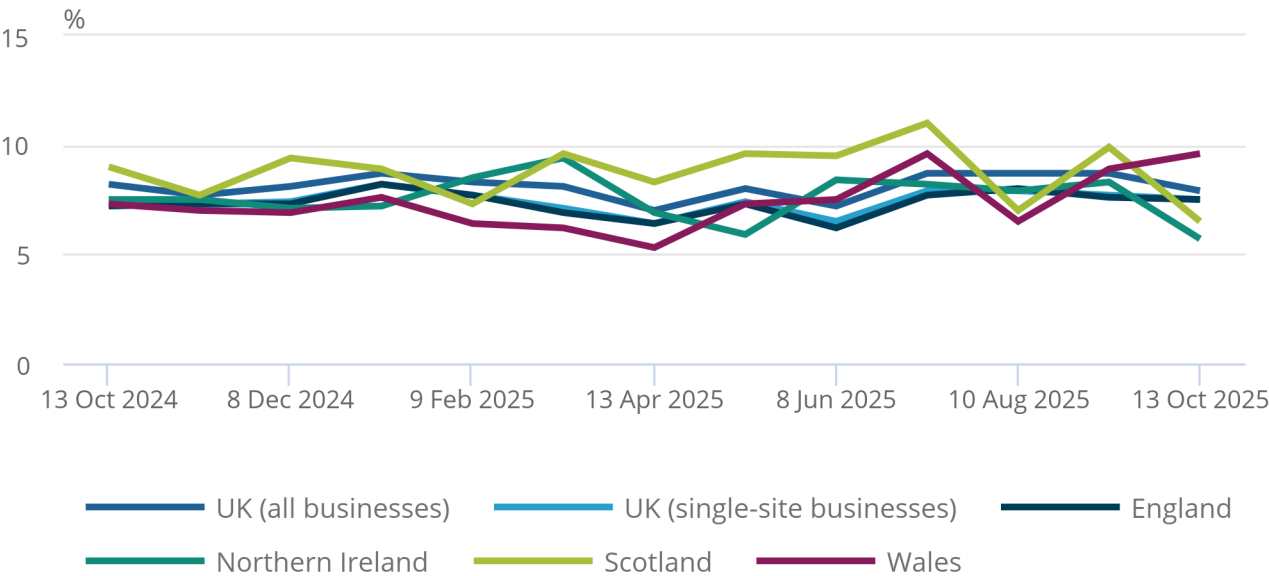
**Download the data**

**Figure 8: Wales reported the largest proportion of single-site businesses experiencing worker shortages (10%) in early October 2025**

Experiencing worker shortages, percentage of single-site businesses not permanently stopped trading, broken down by nation, weighted by count, UK, 7 October 2024 to 19 October 2025

Figure 8: Wales reported the largest proportion of single-site businesses experiencing worker shortages (10%) in early October 2025

Experiencing worker shortages, percentage of single-site businesses not permanently stopped trading, broken down by nation, weighted by count, UK, 7 October 2024 to 19 October 2025



Source: Business Insights and Conditions Survey from the Office for National Statistics

Notes:

1. Final weighted all UK site results and weighted single-site estimates, Wave 118 and 142 of the Office for National Statistics' Business Insights and Conditions Survey.
2. Response rates vary across nations and between waves. Low response can affect the interpretation of these estimates.
3. Data are plotted in the middle of the period of each wave.

The proportion of UK single-site businesses experiencing worker shortages in early October 2025, when compared with early October 2024, remained broadly stable at around 8% for the entire year. The South West and the West Midlands had the joint highest proportions of any nation or region (11%), while the South West also reported the largest increase between early October 2024 (8%) and early October 2025.

Scotland regularly saw a higher proportion of single-site businesses that reported having worker shortages than the UK overall between early October 2024 and early October 2025. However, Wales was the nation or region that reported the largest proportion for early October 2025, at 10%.

## 6 . Data on business insights and impact on the UK subnational single-site economy

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

Dataset | Released 3 November 2025

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 nation and regional levels.

## 7 . Glossary

### Private sector businesses

The Business Insights and Conditions Survey (BICS) is a survey of private sector businesses, meaning that the public sector is not sampled. Some businesses are also excluded; please see the Coverage section of the [Business Insights and Conditions Survey quality and methodology information \(QMI\)](#) page for more information.

### 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.

### Trading businesses

Trading businesses refers to businesses that responded that their trading status was "currently fully trading" or "currently partially trading" only.

If trading businesses is not specifically specified, the statistics presented refer to businesses that have "Not permanently stopped trading". This includes trading businesses and those that said their trading status was "paused trading and intends to restart in the next two weeks" or "paused trading and does not intend to restart within the next two weeks".

## 8 . Data sources and quality

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 118 to Wave 142 of the BICS (7 October 2024 to 19 October 2025) covering the period since the last edition of this article.

The Business Insights and Conditions Survey (BICS) is voluntary, and the results are classed as [official statistics in development](#).

Table 1: Sample and response rates for all businesses, single-site businesses and multi-site businesses for Waves 138, 140 and 142 of the Business Insights and Conditions Survey			
Wave	Wave 138	Wave 140	Wave 142
All businesses sample	38,881	38,829	38,795
All businesses rate	26.9%	26.7%	26.8%
Single-site businesses sample	28,156	28,093	28,052
Single-site businesses rate	23.5%	23.2%	23.3%
Multi-site businesses sample	10,725	10,736	10,743
Multi-site businesses rate	35.8%	35.6%	36.1%

Source: Business Insights and Conditions Survey from the Office for National Statistics

### 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.

Table 2: Response rates for single-site businesses broken down by nation for Wave 142 of the Business Insights and Conditions Survey

Wave	Wave 142
<b>Northern Ireland single-site businesses sample</b> 818	
<b>Northern Ireland single-site businesses rate</b>	16.9%
<b>Scotland single-site businesses sample</b> 1,736	
<b>Scotland single-site businesses rate</b>	21.8%
<b>England single-site businesses sample</b> 24,551	
<b>England single-site businesses rate</b>	23.8%
<b>Wales single-site businesses sample</b> 947	
<b>Wales single-site businesses rate</b>	20.2%

Source: Business Insights and Conditions Survey from the Office for National Statistics

## 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.
2. The Business Insights and Conditions Survey samples a random sample of businesses across the UK, not by country.

## Subnational BICS estimates

Subnational BICS estimates have been created by using the results collected in the fortnightly survey. 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 [Inter-Departmental Business Register \(IDBR\)](#)). Sections 2 and 3 of our [Business insights and impact on the UK and subnational economy: 9 December 2022 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 \(ITL1\)](#) 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 headline figures.

## Weighting

Single-site estimates in this release are weighted, ensuring estimates are representative of all single-site businesses. The characteristics of single-site businesses that responded within a certain region and wave can have an impact on subnational BICS estimates. A detailed description of the weighting methodology and its differences to unweighted estimates is available in our [Business Impact of Coronavirus \(COVID-19\) Survey \(BICS\): preliminary weighted results](#).

The [weighted estimates for Scotland for businesses with 10 or more employees](#) are available from the Scottish Government website.

## 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.

## Measuring the data

The BICS survey 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 our [Business Insights and Conditions Survey \(BICS\) quality and methodology information \(QMI\)](#).

## 9 . Related links

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

Bulletin | Updated frequently

Latest updates from the Business Insights and Conditions Survey (BICS).

[Business and innovation statistics](#)

Web page | Updated frequently

A directory of statistical publications relating to business and innovation in Scotland, organised by subject.

## 10 . Cite article

Office for National Statistics (ONS), released 3 November 2025, ONS website, article, [Business insights and impact on the UK subnational single-site economy: November 2025](#)