



## English Business Survey – February 2013

This release presents the key messages from the English Business Survey (EBS) for February 2013. The EBS interviews 3,000 workplaces each month and provides timely intelligence on business conditions in England. The Survey provides an assessment of past, current and future conditions. The data refers to business conditions in February 2013, which is the reference month for the survey.

### Terminology

What these statistics mean:

- The EBS is a survey of workplaces. A workplace can be a single business, or a workplace that is part of a larger enterprise, for example the local store of a large supermarket chain. Ninety-seven per cent of enterprises consist of a single workplace.<sup>1</sup> The term business will be used throughout this release.
- In order to reflect the relative importance or contribution of different sized workplaces to the local economy, the survey uses the number of people employed at each workplace as the measure of its contribution to the economy. Where the size of business is reported in the release, this refers to the number of people employed at each workplace.
- Where 'Balances' are presented, they are the difference between the 'higher' responses and the 'lower' responses. Balances provide a summary of the scores for businesses that report, or expect a variable to change. More detailed information on the terminology used is included in the Background Notes to the release.

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<sup>1</sup> Source: UK Business: Activity, Size and Location, 2012

## Key Points

- Results for economic output were neutral in February with approximately the same proportion of businesses reporting that output has increased (29%) as decreased (28%) since November 2012. An estimated net positive balance of (+1%) was recorded, lower than the balance for the same period a year earlier (+7%).
- Employment levels are stable with the majority – an estimated 69% of businesses – reporting that they remained unchanged in November compared with February; the highest proportion since May 2012. Of the businesses that did report a difference: slightly more reported declines (16%) than increases (14%), leading to a net negative balance of -2%.
- London and the South East were the strongest performing regions for output, while the South East and the South West performed most strongly in terms of employment.
- Results for capital investment changed very little from the previous month's estimates and those for February 2012. An estimated 28% of businesses reporting that new capital investment was made between December and February.
- Looking ahead, significantly more businesses are anticipating higher output (48%) compared to lower output (10%) in May.

## Economic Context

This section provides contextual information on the economic performance over the survey period (February 2013) and in the preceding month to help the user to interpret the statistics.

Official statistics showed the value of the economy – Gross Domestic Product (GDP) – was preliminarily estimated to have increased by 0.3% in Q1 2013 compared with Q4 2012. GDP was 0.4% higher in Q1 2013 than in Q3 2011 and therefore has been broadly flat over the last 18 months.<sup>2</sup> According to Eurostat, GDP in the Euro area contracted by 0.6% during Quarter 4 2012.<sup>3</sup> Over the year 2012, GDP in the Euro area was estimated to have fallen by 0.5%.

Official business statistics paint a mixed picture of the economy: in the three months to January, retail sales declined,<sup>4</sup> manufacturing output continued to contract<sup>5</sup>. However, there was a small increase in construction output in February compared to January. Annual inflation was estimated to be 2.8% in

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<sup>2</sup> <http://www.ons.gov.uk/ons/rel/gva/gross-domestic-product--preliminary-estimate/q1-2013/stb-gdp-preliminary-estimate--q1-2013.html>

<sup>3</sup> [http://epp.eurostat.ec.europa.eu/cache/ITY\\_PUBLIC/2-14022013-AP/EN/2-14022013-AP-EN.PDF](http://epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/2-14022013-AP/EN/2-14022013-AP-EN.PDF)

<sup>4</sup> <http://www.ons.gov.uk/ons/rel/rsi/retail-sales/index.html>

<sup>5</sup> <http://www.ons.gov.uk/ons/rel/iop/index-of-production/index.html>

February, an increase of 0.1% from January's inflation rate and above the Bank of England target rate of 2.0%.<sup>6</sup>

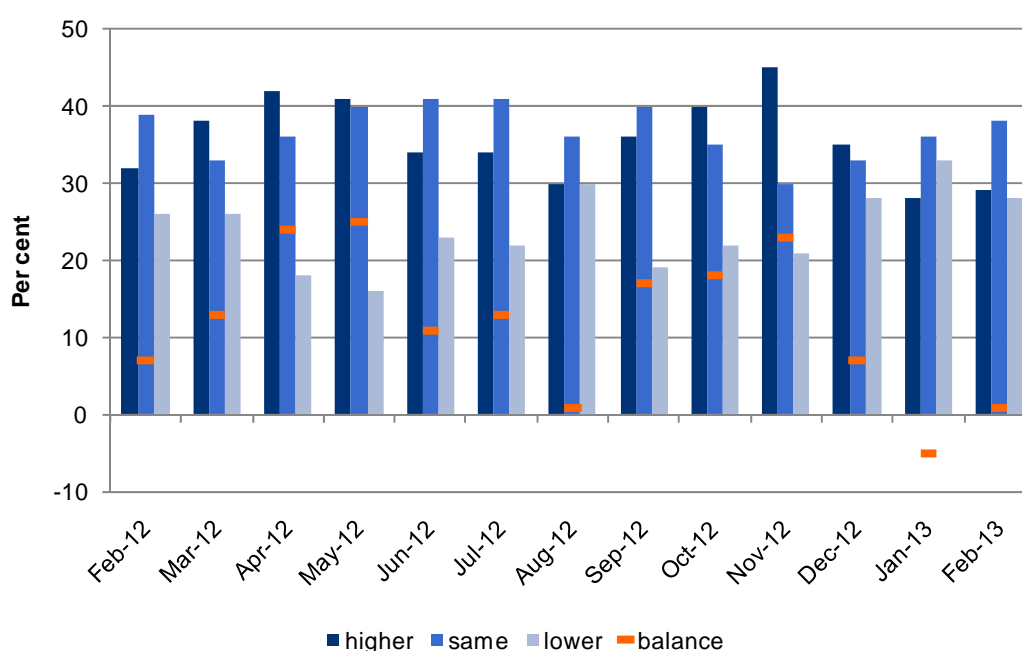
The labour market was more subdued than previous months with employment levels staying stable and unemployment rate rising by 0.2% to 7.9% over the three months to February.<sup>7</sup>

## Latest EBS Results

### Output

In February 2013, business performance in England was neutral, with varied performances subnationally.

**Chart 1: Level of output in England, February 2012 to February 2013**



**Notes:**

1. Workplaces were asked about the level of output in a month three months earlier when compared to the reporting month, for example February 2013 results compare February with November 2012.
2. Estimates are not seasonally adjusted.
3. Survey results sum to 100%=(% Higher)+(% The same)+(% Lower)+(% Don't know). Estimates for 'Don't know' have been excluded from this chart, but are available in the tables that accompany the release.

Source: BIS - English Business Survey, February 2013

The results show that a large proportion of businesses found that output<sup>8</sup> stayed the same (38%) and a balance score of +1% was reported.<sup>9, 10</sup> This

<sup>6</sup> <http://www.ons.gov.uk/ons/rel/cpi/consumer-price-indices/index.html>

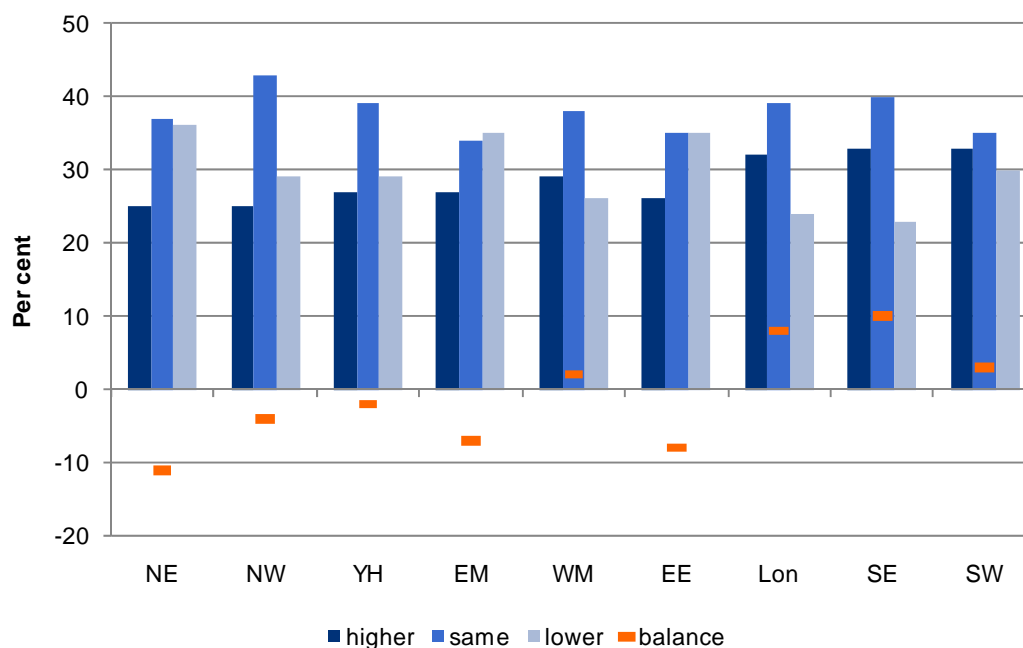
<sup>7</sup> <http://www.ons.gov.uk/ons/rel/lms/labour-market-statistics/april-2013/statistical-bulletin.html>

<sup>8</sup> Output can be thought of as the quantity of goods or services produced by a business

<sup>9</sup> Businesses are asked whether they believe their level of business activity or volume of output at a workplace is the same, higher or lower.

is an improvement on last month's EBS balance (-5%); however, it is lower than the balance recorded from same period last year (+7%).

**Chart 2: Level of output in England, by region, February 2013**



Notes:

1. Workplaces were asked about the level of output in a month three months earlier when compared to the reporting month, for example February 2013 results compare February with November 2012.
2. Survey results sum to 100%=(% Higher)+(% The same)+(% Lower)+(% Don't know). Estimates for 'Don't know' have been excluded from this chart, but are available in the tables that accompany the release.

Source: BIS - English Business Survey, February 2013

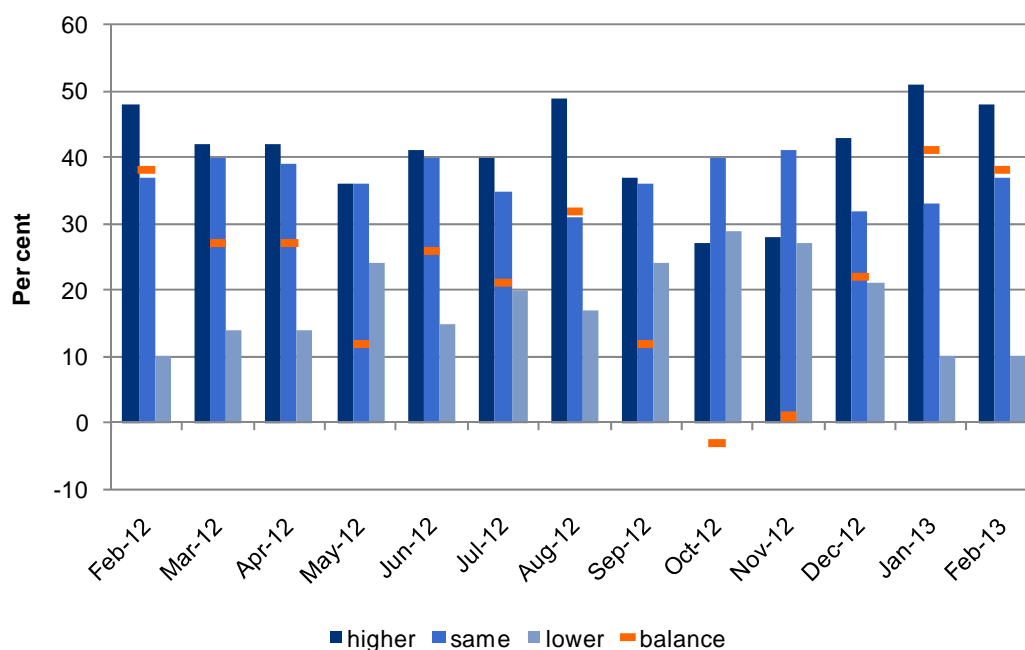
Output performance was varied across the English regions: five regions recorded negative balance scores and four recorded positive scores. The North East, East Midlands and the East of England reporting the worst performance – estimated balance scores of -11%, -7% and -8%, respectively. In contrast, London (+8%) and the South East (+10%) were the strongest performing regions.

When examining the survey results by the size of the business,<sup>11</sup> medium sized businesses of 50 to 249 employees were most likely to report that output had increased when compared to November (35%) and least likely to report that output was lower (21%), giving a balance of +14%. In contrast, micro businesses of 1 to 9 employees performed the least well with an estimated 25% reporting higher output compared to 39% reporting lower output, giving a negative balance score of -15%.

<sup>10</sup> Responses across all categories (i.e. Higher, The same, Lower and Don't Know) sum to 100%. Workplaces accounting for 4% of employment responded don't know. See data tables (<https://www.gov.uk/government/organisations/department-for-business-innovation-skills/series/english-business-survey>) for detailed figures.

<sup>11</sup> Business size is measured in terms of the number of employees at the workplace.

**Chart 3: Expected level of output in England, February 2012 to February 2013**



**Notes:**

1. Workplaces were asked about their expectations for the level of output in a month three months into the future, when compared to the reporting month, for example February 2013 results compare February with April 2013.
2. Estimates are not seasonally adjusted.
3. Survey results sum to 100%=(% Higher)+(% The same)+(% Lower)+(% Don't know). Estimates for 'Don't know' have been excluded from this chart, but are available in the tables that accompany the release.

Source: BIS - English Business Survey, February 2013

**Expected output performance**

Expectations of business output were positive for England and the English regions.

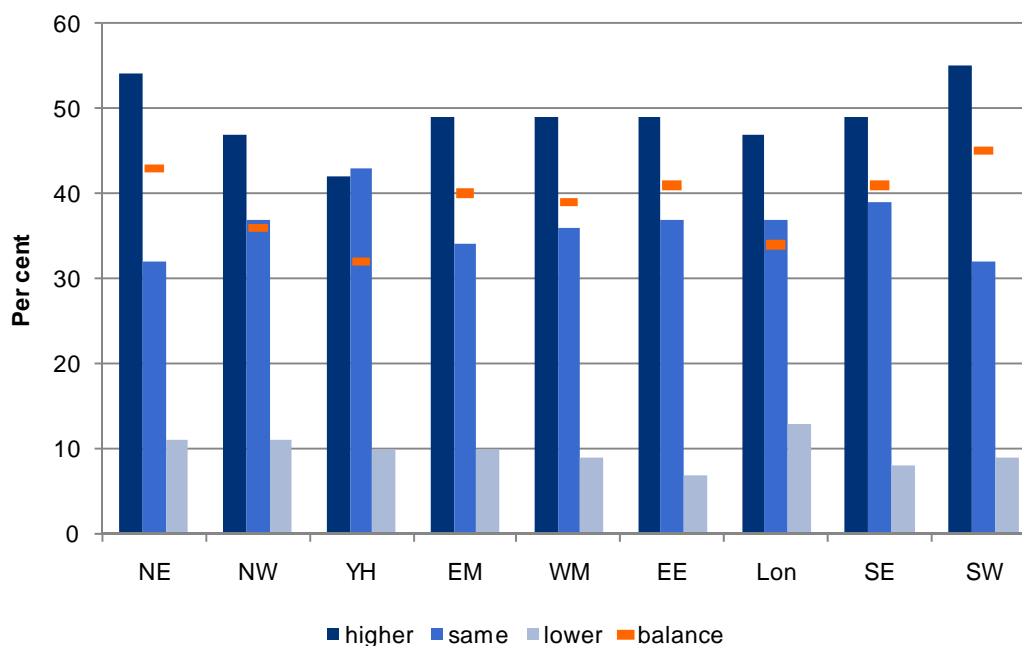
An estimated 48% of businesses in England expect output to be higher in May than it was in February 2013; 10% expect output to fall, with 37% of businesses expecting output to remain the same. This gives a positive balance of +38%. This was only marginally lower than the output expectation balance recorded in January (+41%), which was the highest since EBS began. However, it is worth noting that the output expectations balance for the same period last year was also (+38%), therefore the positivity may be due to seasonal variation<sup>12</sup>.

All regions reported a high positive balance score on expectations of future output, with the South West (+45%) and the North East (+43%) particularly positive; expectations were relatively subdued in Yorkshire and Humber (+32%). In line with last month's result, output expectations were again relatively weak in London, where the highest proportion of businesses in any

<sup>12</sup> Seasonal variation is the repetitive and predictable movement around the trend line in one year or less

region (13%) are anticipating a decline in output in May 2013, and a balance of (+34%) was reported in this region.

**Chart 4: Expected level of output in England, by region, February 2013**



Notes:

1. Workplaces were asked about their expectations for the level of output in a month three months into the future, when compared to the reporting month, for example February 2013 results compare February with April 2013.
2. Survey results sum to 100%=(% Higher)+(% The same)+(% Lower)+(% Don't know). Estimates for 'Don't know' have been excluded from this chart, but are available in the tables that accompany the release.

Source: BIS - English Business Survey, February 2013

Positive output balance scores were reported for all sizes of business in February. Mimicking the trend from the backward looking balances: medium sized businesses (50 to 249 employees) recorded the largest balance of +43%; and, micros were the least optimistic with the lowest proportion of businesses expecting higher output (47%), and the lowest balance score of +33%.

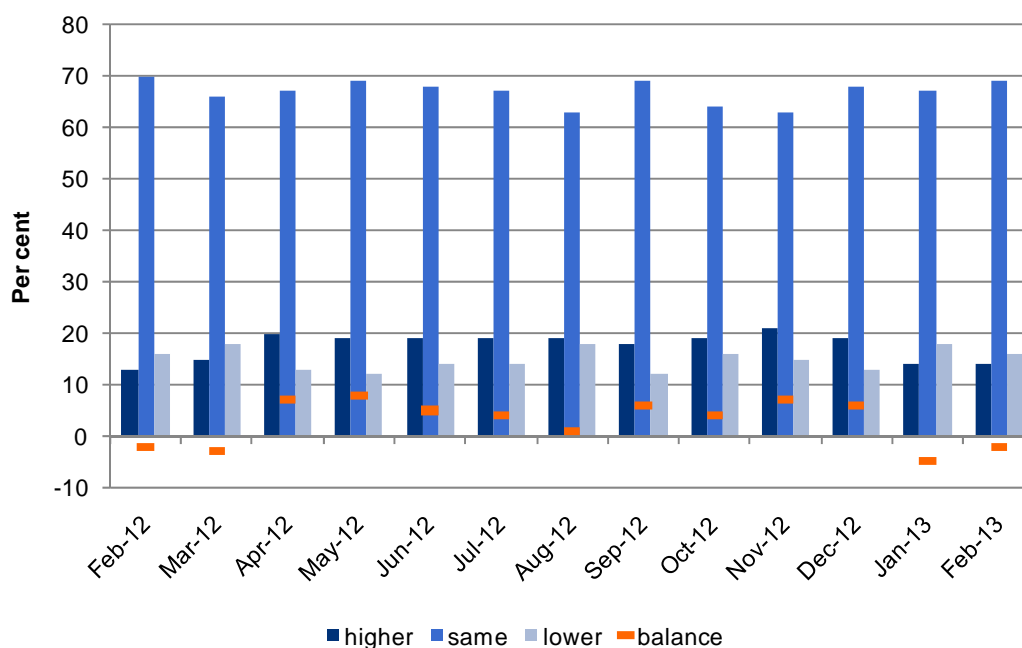
## Employment

In England and its regions, the majority of businesses reported that employment levels<sup>13</sup> were stable.

In England, an estimated 69% of businesses reported employment was the same, while 14% indicated that employment was higher and 16% indicated that it was lower than three months earlier; giving a balance of -2%. This is the same balance score as the corresponding period last year.

<sup>13</sup> Employment level is used to describe the average number of people working at a workplace.

**Chart 5: Level of employment in England, February 2012 to February 2013**



**Notes:**

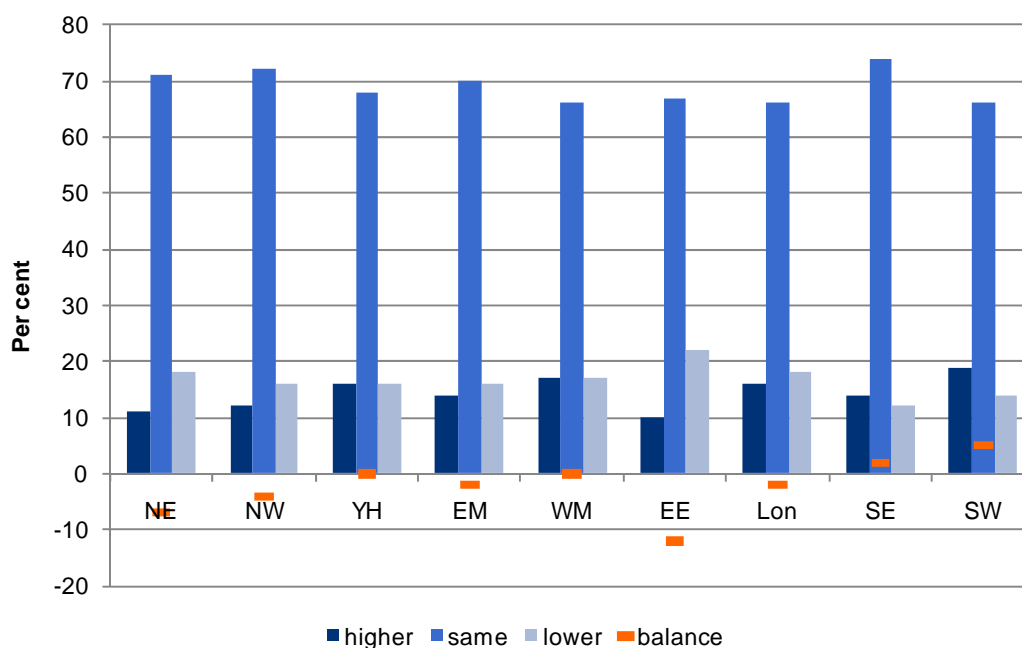
1. Workplaces were asked about the level of employment in a month three months earlier when compared to the reporting month, for example February 2012 results compare February with November 2012.
2. Estimates are not seasonally adjusted.
3. Survey results sum to 100%=(% Higher)+(% The same)+(% Lower)+(% Don't know). Estimates for 'Don't know' have been excluded from this chart, but are available in the tables that accompany the release.

Source: BIS - English Business Survey, February 2013

Only the South East (+2%) and the South West (+5%) recorded positive employment balances. Conversely, the East of England recorded the weakest performance, with a net negative balance of -12% for employment; this is significantly lower than the result for England as a whole (-2%).

There was little variation between workplace sizes with respect to employment balances. Micros recorded a marginally positive balance of +1%, whilst small, medium and large businesses reported negative balances of -4%, -1% and -2% respectively for the period between November and February.

**Chart 6: Level of employment in England, by region, February 2013**



**Notes:**

1. Workplaces were asked about the level of employment in a month three months earlier when compared to the reporting month, for example February 2013 results compare February 2013 with November 2012.
2. Survey results sum to 100%=(% Higher)+(% The same)+(% Lower)+(% Don't know). Estimates for 'Don't know' have been excluded from this chart, but are available in the tables that accompany the release.

Source: BIS - English Business Survey, February 2013

**Expected employment performance**

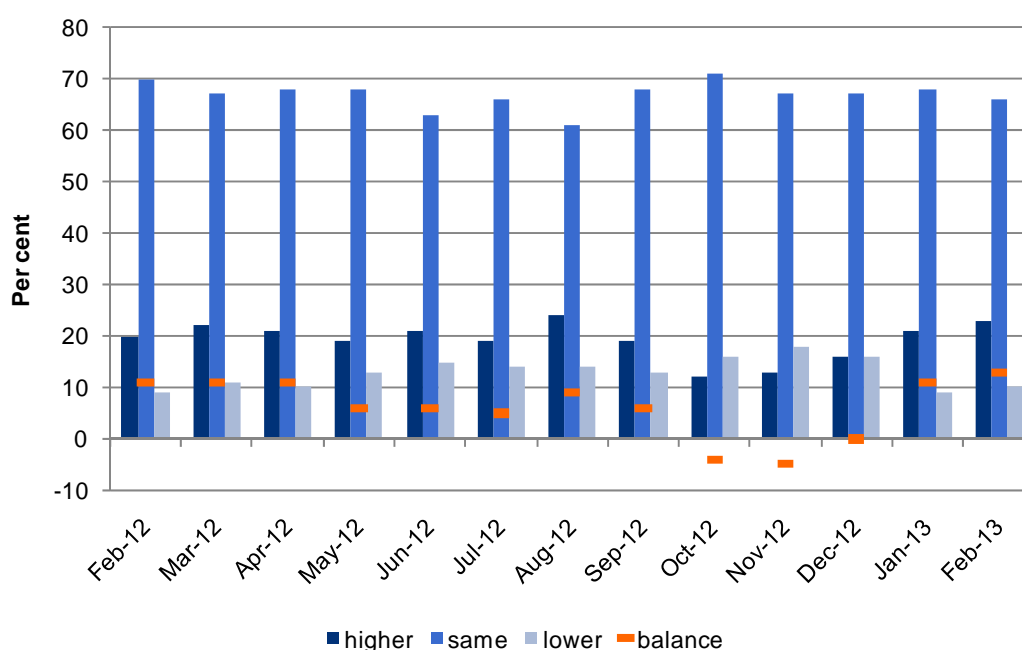
Looking forwards, expectations of future employment are particularly positive for England and the English regions.

The majority of businesses (66%) are expecting employment to stay the same in May. A net positive balance of +13% was recorded as more businesses (23%) are anticipating higher employment than lower (10%), this was higher than the balance recorded for the same period last year (+11%).

All regions recorded a positive balance score for expectations of future employment with the most optimistic being the South West (+20%) and the South East (+19%). This mirrors the particularly optimistic outlook in output levels in these regions.

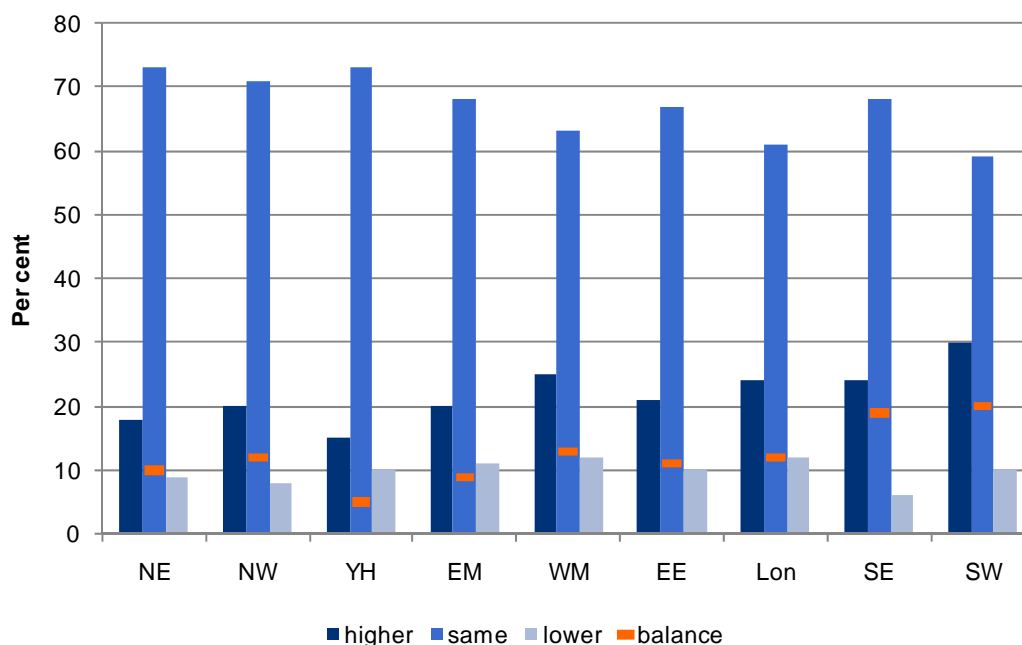


**Chart 7: Expected level of employment in England, February 2012 to February 2013**



Source: BIS - English Business Survey, February 2013

**Chart 8: Expected level of employment in England, by region, February 2012**



Notes for charts 7 and 8:

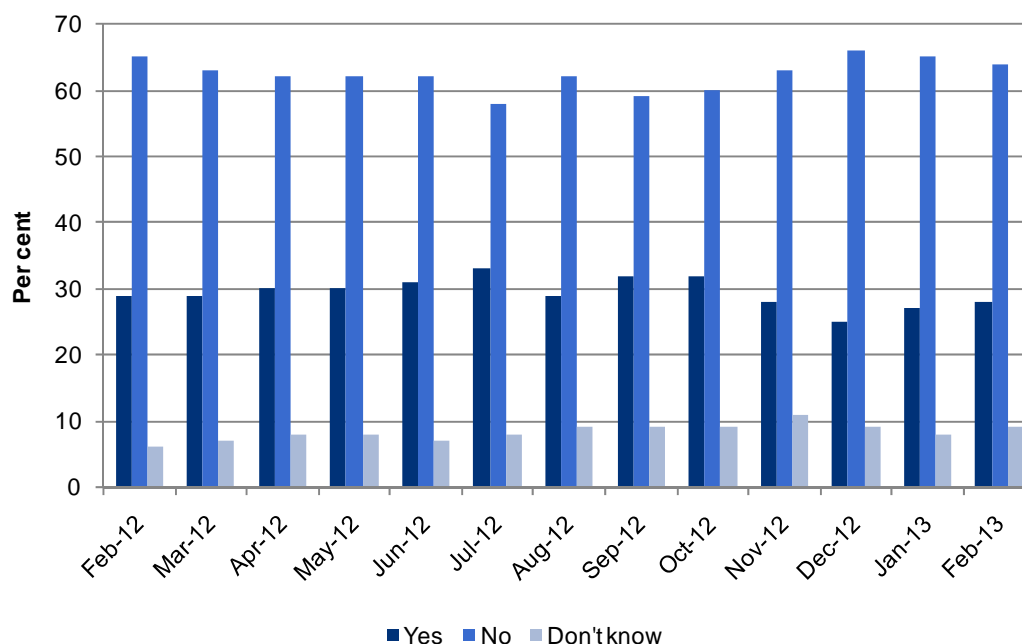
1. Workplaces were asked about their expectations for the level of employment in a month three months into the future, when compared to the reporting month, for example February 2012 results compare February with April 2013.
2. Estimates are not seasonally adjusted
3. Survey results sum to 100%=(% Higher)+(% The same)+(% Lower)+(% Don't know). Estimates for 'Don't know' have been excluded from this chart, but are available in the tables that accompany the release.

Source: BIS - English Business Survey, February 2013

## Capital Investment

Capital stock stayed stable as the majority of businesses chose not to make new capital investment in England and English regions.

**Chart 9: Capital investment in England, February 2012 to February 2013**



**Notes:**

1. Workplaces were asked whether they made any new capital investment in the previous three months, for example February 2013 results ask about the period November to February 2013.
2. Estimates are not seasonally adjusted.

Source: BIS - English Business Survey, February 2013

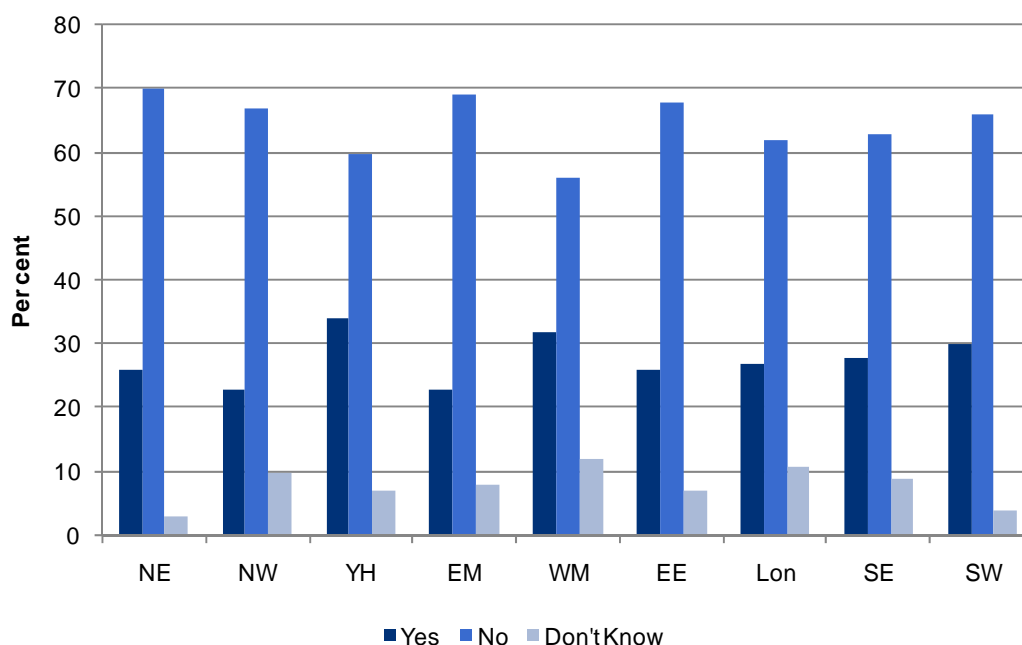
In England 64% of businesses chose not to make capital investments in the three months to February, only an estimated 28% of businesses made new capital investment<sup>14</sup>. This is similar to the same period last year where 29% of businesses made new capital investment and 65% chose not to.

The North West reported the smallest proportion of businesses making capital investments (23%). The regions in which businesses were most likely to have made new capital investment were the West Midlands (32%) and Yorkshire and Humber (34%).

Compared to the same period last year when 43% of large businesses made capital investments, only 36% of businesses stated that they had made new capital investment between December and February 2013; however this is still a higher proportion than other workplace sizes. In contrast, micros were least likely to have made new capital investment in the period, with only 19% stating that they had.

<sup>14</sup> Capital Investment is used to describe buildings, plant and machinery, equipment, vehicles and computer hardware and software that has taken ownership of, or has started to use – these investments can be bought or leased; it does not include items that have been ordered but have not been used.

**Chart 10: Capital investment in England, by region, February 2013**



Notes:

1. Workplaces were asked whether they made any new capital investment in the previous three months, for example February 2013 results ask about the period November to February 2013.
2. Estimates are not seasonally adjusted.

Source: BIS - English Business Survey, February 2013

### *Expected capital investment*

Looking ahead, 29% of businesses in England expect to make new capital investment between March and May 2013; this is the same as last month's result, which was the highest proportion since June 2012.<sup>15</sup> Generally, the proportion of businesses expecting to make capital investments was similar across regions. However, the North West was an exception, with only 23% of businesses, the lowest proportion of all regions, expecting to invest. On the other end of the spectrum, Yorkshire and the Humber reported the highest proportion of businesses expecting to make capital investment (35%).

As with the general trend over the EBS time series, larger businesses with 250+ or more employees are most likely to expect to make capital investment between March and May, with an estimated 42% expecting to make capital investment. This compares with only 19% of micro businesses expecting to make capital investment.

### **Coherence with similar data**

Other business surveys, conducted by both trade bodies and private companies, collect information across a range of variables. Although some of this information overlaps with that collected through the EBS, the EBS has the advantages that it: brings the data together in a single place; allows sub-

<sup>15</sup> Results are not adjusted for seasonality.

regional analysis each quarter; and, covers all sectors of the economy, including the public/not-for-profit sectors.

Along with many other business surveys, data from the EBS is difficult to reconcile with official statistics, particularly output. The Confederation of British Industry's (CBI) *Industrial trend survey*<sup>16</sup> reported slight contraction in output volumes in the three months to February, with the most negative performance recorded in the North East and the Midlands. Expectations were more positive; however differing from the EBS, the view is that the North West and Yorkshire and the Humber will be anticipating the best performance.

Broadly consistent with the EBS, the monthly *Purchasing Manager's Index* (PMI)<sup>17</sup> reports a slight improvement in output performance in the three months to January 2013 and that the North East recorded the weakest performance in the period. Similarly, the British Chamber of Commerce (BCC)'s *Quarterly Economic Survey*<sup>18</sup> also found an increase in domestic sales over Quarter 1 2013. In their results, investment level was also shown to have risen during this period.

Unlike the EBS, which recorded more subdued results for employment for the period between November and February, the *Quarterly Economic Survey* indicated that employment increased in Quarter 1 2013 and predicts employment will continue to increase in Quarter 2 2013; the *Industrial trends survey* similarly recorded a positive balance of +2% for employment respectively for the three month to February. However, official statistics are slightly more negative and seem to support EBS results, finding a rise in unemployment between December 2012 and February 2013.

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<sup>16</sup> <http://www.cbi.org.uk/business-issues/economy/business-surveys/industrial-trends-survey/>

<sup>17</sup> <http://www.markiteconomics.com/Survey/Page.mvc/AboutPMIData>

<sup>18</sup> <http://www.britishchambers.org.uk/policy-maker/policy-reports-and-publications/quarterly-economic-survey-q4-2012.html>

## Background Notes

### Product Development

The survey has undergone extensive development and testing, including pilot testing of the survey and cognitive testing of the survey questions. The Report on the EBS Questionnaire<sup>19</sup> contains details of the development and testing of the questionnaire; the Technical Annex details the methods which underpin the survey. Both documents are available on the EBS webpage.<sup>20</sup>

EBS methods and questionnaire continue to be reviewed and analysed to ensure they remain the best possible. Should you have any comments on the statistics – including on the methods used and dissemination of the statistics – or would like to inform us how you use the statistics, please contact [ebssurvey@bis.gsi.gov.uk](mailto:ebssurvey@bis.gsi.gov.uk).

### Quality and use

The English Business Survey provides timely and robust information on a regular and geographically detailed basis, the survey enhances understanding of business perceptions and economic conditions throughout England and ultimately improves policy making through this understanding. The statistics are also useful to businesses, providing intelligence about local economic and business conditions.

These estimates are currently classified as experimental statistics as they are undergoing development and have not yet been assessed against the standards required for National Statistics. It is recommended that users exercise caution when interpreting time series data, as the data are likely to include seasonal patterns, which have not been removed through seasonal adjustment<sup>21</sup>. It is expected that seasonal patterns will differ by industry, for example, all else being equal, some industries would expect output to be much lower in February compared to November due to seasonal patterns. It is recommended that until the statistics are assessed for seasonality that time series results are interpreted with caution.

### Methodology

The English Business Survey is a monthly telephone survey that asks managers at sampled workplaces about their expectations and experiences on a range of measures such as output or sales. The data are weighted so that the weighted sample matches the population with respect to sub-region and employment<sup>22</sup>. This is designed to capture the importance of the

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<sup>19</sup> <http://www.bis.gov.uk/assets/biscore/statistics/docs/e/12-601-english-business-survey-report-questionnaire-development.pdf>

<sup>20</sup> <http://www.bis.gov.uk/analysis/statistics/sub-national-statistics/ebssurvey>

<sup>21</sup> The recommended approach for removing seasonality in UK Official Statistics requires three years of monthly data or 5 years of quarterly data.

<sup>22</sup> The characteristics used for weighting include: location (NUTS2 Region) and employment size (0-49, 50-249 and 250+).

workplace to the economy; employment is used as a proxy for economic importance as a robust measure of turnover is not available for all workplaces. The use of employment means that the results effectively estimate: the proportion of employees whose manager believes a particular measure is positive/negative/the same.

To aid understanding and assist in the interpretation of the survey findings there are two documents aimed at different types of user: a non-technical User Guide<sup>23</sup>, which provides information about how to interpret results, and a Technical Annex<sup>24</sup>, which contains detailed information about the methodology.

## Strengths and Limitations

The EBS has a number of strengths:

- a relatively large monthly sample with the potential to provide timely sub-national statistics;
- a workplace focus, which will enable data on local conditions to be collected;
- an ‘economic influence’-type weighting approach to try to better represent what is happening for sub-national economies;
- coverage of all sectors of the economy, including the public/not-for-profit sectors; and
- timely statistics, allowing policy makers and businesses to react promptly to issues as they arise in the current macroeconomic climate.

However, it also has some limitations:

- the nature of data collection being at workplace level mean that statistics about region, employment size and industry all relate to that of the workplace, rather than for the enterprise. Accordingly, inferences about the enterprise-level business population are more limited; and
- due to the coverage of the sampling frame – the Inter-Departmental Business Register – the EBS does not cover non-registered<sup>25</sup> businesses. This is potentially important as such businesses make up a significant proportion of the overall business population (55% of businesses) although

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<sup>23</sup> <http://www.bis.gov.uk/assets/biscore/statistics/docs/e/12-598-english-business-survey-user-guide.pdf>

<sup>24</sup> <http://www.bis.gov.uk/assets/biscore/statistics/docs/e/12-602x-english-business-survey-technical-annex.pdf>

<sup>25</sup> Non-registered businesses are not registered for either PAYE or VAT, which means they are generally, the very smallest non-employing businesses.

they account for a smaller share of employment (12%) and turnover (3%)<sup>26</sup>.

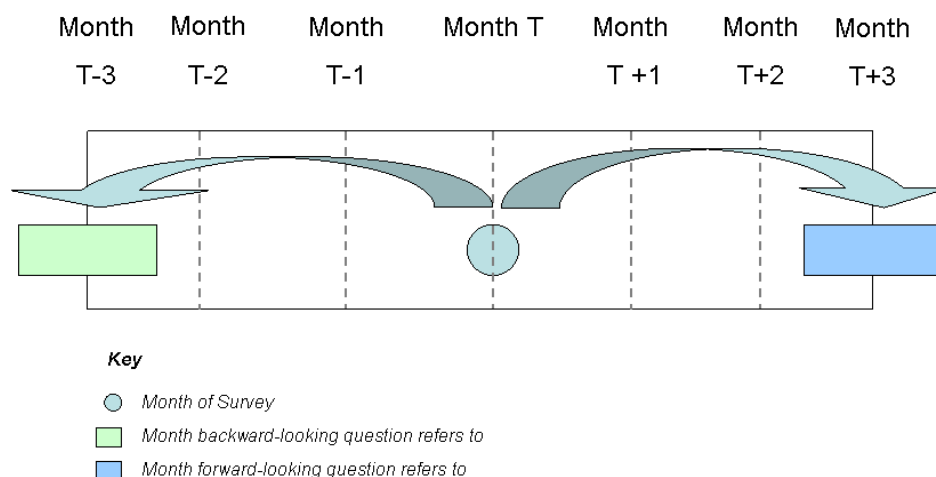
## Interpreting the results

### Workplace based survey

1. The main purpose of the EBS is to provide sub-national information. For this reason the EBS is a survey of workplaces and the region, employment size and industry all relate to that of the workplace.

### Period covered

2. EBS Releases are labelled by the period which workplaces are asked about (the reference month). In most questions workplaces are asked to compare the reference month (month T) with the month three months previous and three months forward. For example, for the September 2012 EBS, most backward-looking questions compare September 2012 with June 2012 and forward-looking questions compare February 2013 with November 2012.



3. However, care should be taken, as for questions on capital investment, capacity constraints and annual output the question refers to a reference period of several months, not a single month. Periods being compared are clearly labelled on the tables. This is also explained in the EBS User Guide.

### Balance Statistics

4. A balance can be achieved through a number of different scenarios in the underlying results, for example a balance of zero can be achieved from Higher and Lower both being 0% or both being 50%. It is therefore important to consider the underlying figures. All figures in this document and the underlying data can also be found in the supporting tables.
5. It is important to remember that these questions only ask workplaces whether output was higher or lower and this does not take into account the size of any

<sup>26</sup> Statistics on the non-registered businesses are taken from Business Population Estimates for the UK and Regions 2012

changes. Therefore a balance of 50% does not necessarily mean output growth will be higher than if the balance was 20%, as the growth rate seen by those contributing to the 20% positive balance may, in aggregate, outweigh the growth rates seen or expected by those contributing to the positive 50% balance. The difference in size between two higher percentages simply means that businesses accounting for a larger proportion of the economy, reported that output was higher.

### *Time Series Comparisons*

6. Data from the EBS is still in its infancy and therefore it is not yet possible to seasonally adjust the data. The results presented in this release are not seasonally adjusted and users should be aware of this when interpreting the results, as it is likely that comparisons over time will show large changes for certain groups; these changes could be true changes, but they could be a result of seasonal patterns.

### *Accuracy*

7. All estimates based on a sample of the population rather than a census are subject to sampling error. Calculation of these errors for the EBS is still being developed and will be released when available, however, provisional information on the likely size of these sampling errors is provided in the *Technical Annex*.
8. Like all statistics, the estimates in the EBS are subject to potential non-sampling errors – for example biases; measurement errors; and calculation errors. However, attempts have been made to minimise these by, for example, rigorous testing of the questionnaires, monitoring the work of interviewers and response rates to the survey.
9. Provisional testing has been carried out to test for statistically significant differences between the England total results and the results from each sub-group. For example whether the higher percentage in the North East is significantly different to that in England. The results of these tests are marked on the accompanying tables. Due to additional complexities testing has not yet been done on the balances. A worked example of what this testing means and how it should be interpreted is in the *User Guide*.

### *Presentation*

10. In the tables accompanying this release, the following conventions have been used:
  - 0 nil (none recorded in sample)
  - \* Suppressed due to small cell sample size
  - - Suppressed due to small column sample size
  - ... Balance score not available due to small sample counts
11. All figures and percentages in this release, including the accompanying tables, have been rounded. Unweighted counts have been rounded to the nearest 5 and percentages have been rounded to the nearest integer. Balances are calculated based on unrounded figures and rounded independently therefore



differences in the components may not equal the difference between the rounded figures.

### *Timeliness*

12. Statistics from the EBS are published within two months of the period to which they refer. The date of publication will be announced at least four weeks in advance. We are working towards a regular publication cycle, however due to the experimental nature of the data; the publication date for each month may initially vary. Future publication dates will be added to the National Statistics Publication Hub<sup>27</sup>.

### *Revisions*

13. While every care has been taken to produce reliable statistics, EBS is still being developed and has been designated an Experimental Official Statistic. As the EBS develops statistics may be subject to revision if improvements in methodology are identified. All revisions will be pre-announced where practicable and all known users notified.

## **Additional information**

### *Sub-regional data*

14. The English Business Survey Reporting Tool<sup>28</sup> allows users to access detailed EBS statistics for individual periods (months and quarters) as well as cumulative periods, starting in November 2011 for monthly statistics and Quarter 4 2011 for Quarterly statistics. The reporting tool includes a more extensive range of statistics than presented in the Statistical Release and the supporting tables.

### *Micro data*

15. EBS Micro data are available to 'approved researchers' via ONS' Virtual Micro Laboratory<sup>29</sup> and an aggregated version of the dataset is available to academics from the UK Data Archive<sup>30</sup>.

## **Contact details**

For enquiries, or to give feedback on this publication, please use the details below:

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<sup>27</sup> <http://www.statistics.gov.uk/hub/index.html>

<sup>28</sup> <http://dservuk.tns-global.com/English-Business-Survey-Reporting-Tool/>

<sup>29</sup> <http://www.ons.gov.uk/ons/about-ons/who-we-are/services/vml/index.html>

<sup>30</sup> <http://www.data-archive.ac.uk/>

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