



English Business Survey – November 2012

This release presents the key messages from the English Business Survey (EBS) for November 2012. The EBS interviews 3,000 workplaces each month and provides timely intelligence on business conditions. The Survey provides an assessment of past, current and future conditions. The data refers to business conditions in November 2012, 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. Ninety seven per cent of enterprises consist of a single workplace.¹ 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 positive responses and the negative responses. Balances allow a general assessment of whether businesses feel positive or negative about something. More detailed information on the terminology used is included in the Background Notes to the release.

¹ Source: UK Business: Activity, Size and Location, 2012

Key Points

- The proportion of businesses in England (45%) reporting output being higher than it was three months earlier was the highest reported since the survey began (October 2011).
- Employment is relatively stable with the majority of businesses reporting employment levels remaining the same in November as in August. However, more businesses reported employment to have increased than reported it to have fallen.
- Expectations of future levels of employment have become more subdued, with a negative balance score of -5% for England, the second consecutive negative balance following nine consecutive months of positive balance scores.
- London outperformed the other regions of the UK on measures of output and employment and is the most optimistic region, with the largest positive balance scores for expectations of future output and employment. The North West was the worst performing region with the lowest balance scores for both output and employment. Businesses in the West Midlands have the most pessimistic expectations of output and those in Yorkshire and the Humber are most pessimistic about employment.

Economic Context

This section provides contextual information about economic performance over the survey period (November 2012) and in the preceding months to help the user to interpret the statistics. Official statistics showed the value of the economy - Gross Domestic Product (GDP) - increased in Quarter 3²; however, preliminary estimates indicate the economy contracted in Quarter 4 and that, overall the economy in 2012 was the same size as in 2011³. Official business statistics suggest the economy remains generally weak: in the three months to November, retail sales did not grow⁴, manufacturing output contracted slightly⁵ and there was a small increase in construction output⁶. Inflation rose slightly although prices and wages remained stable⁷. The labour

² <http://www.ons.gov.uk/ons/rel/naa2/second-estimate-of-gdp/index.html>

³ <http://www.ons.gov.uk/ons/rel/gva/gross-domestic-product-preliminary-estimate/q4-2012/index.html>

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

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

⁶ <http://www.ons.gov.uk/ons/rel/construction/output-in-the-construction-industry/index.html>

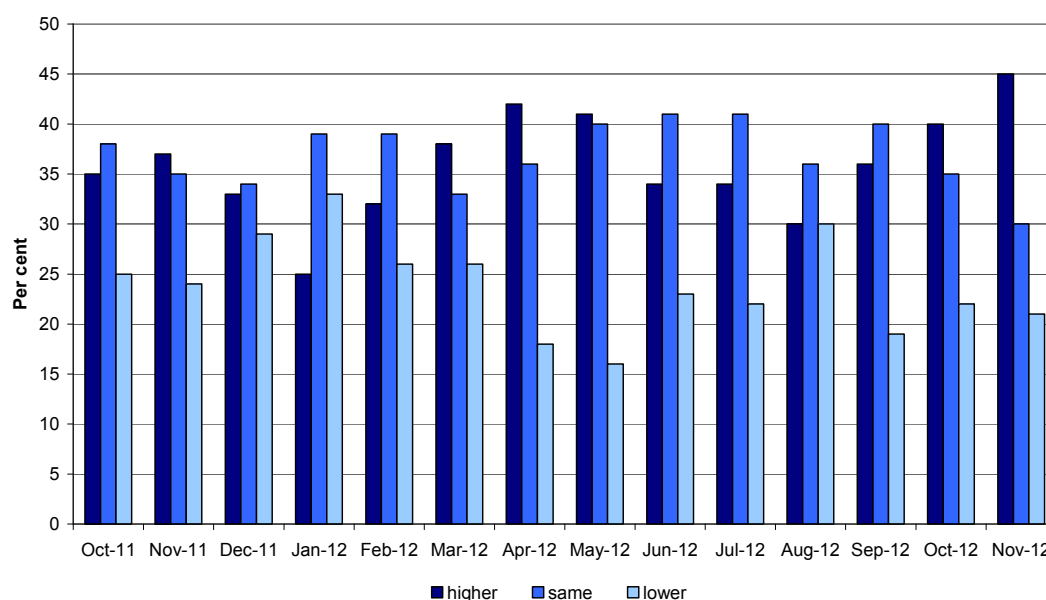
⁷ <http://www.ons.gov.uk/ons/rel/cpi/consumer-price-indices/index.html>

market has proved resilient with employment levels rising over the year and a small fall in unemployment over the three months to November⁸.

Output

Across England as a whole, an estimated 45% of businesses reported that output⁹ was higher in November than it had been in August. This is the highest proportion that has reported an increase in output, since the English Business Survey began in October 2011. Thirty per cent of businesses reported that output in November was the same as it had been in August. Twenty-one per cent of businesses reported lower output¹⁰, giving an overall balance score of +23%.

Chart 1: Level of output in England, October 2011 to November 2012



Notes:

1. Workplaces were asked about the level of output in a month three months earlier when compared to the reporting month, for example November 2012 results compare November with August 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, November 2012

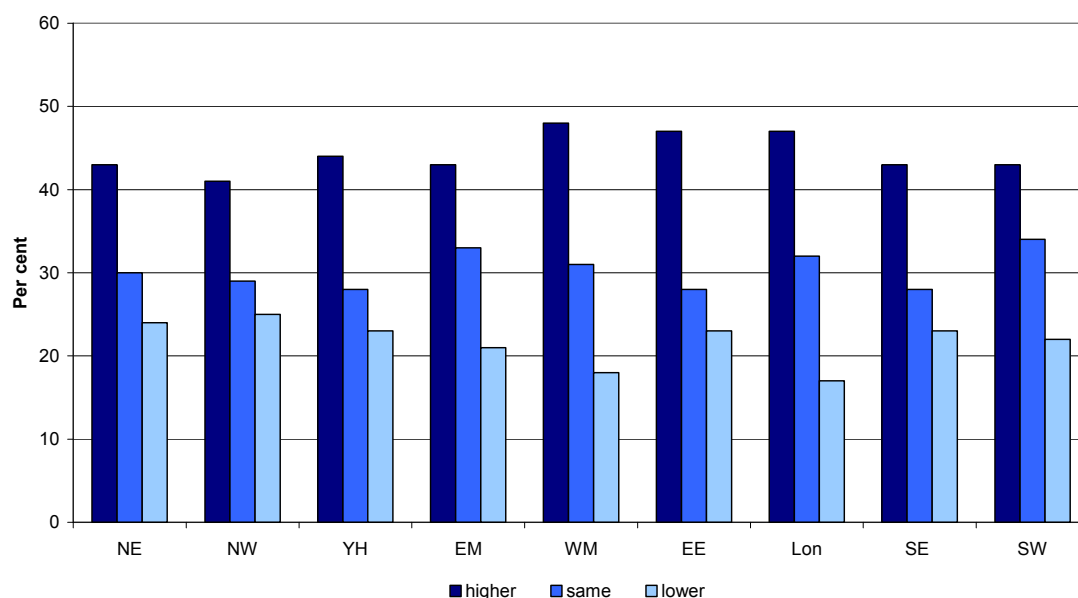
⁸ <http://www.ons.gov.uk/ons/rel/lms/labour-market-statistics/december-2012/statistical-bulletin.html>

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

¹⁰ 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 (<http://www.bis.gov.uk/analysis/statistics/sub-national-statistics/ebsurvey>) for detailed figures.

All regions reported positive balance scores, the highest being in West Midlands (+31%) and London (+30%) and the lowest being in the North West (+16%). London had the smallest proportion of businesses (17%) that reported lower output in November than in August, a figure that was significantly different from the estimate for England (21%).

Chart 2: Level of output in England, by region, November 2012



Notes:

1. Workplaces were asked about the level of output in a month three months earlier when compared to the reporting month, for example November 2012 results compare November with August 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, November 2012

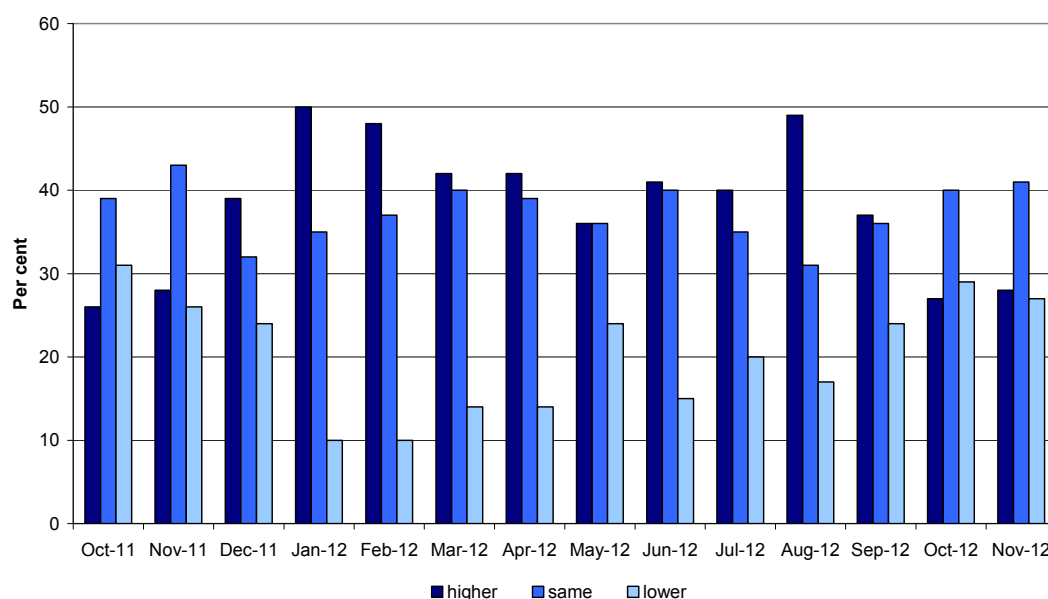
When examining the Survey results by the size¹¹ of the business, larger businesses were most likely to report that output had increased and least likely to report that output was lower. Amongst large businesses of 250 or more employees, an estimated 51% reported higher output compared to 11% reporting lower output, a balance of +39%. In contrast, amongst micro businesses of 1 to 9 employees, an estimated 35% reported higher output compared to 33% reporting lower output, a balance score of +1%

Expectations of future output have become slightly more optimistic when compared to results for October 2012, although they are less optimistic than comparable estimates for each of the previous ten months.¹²

¹¹ Business size is measured in terms of the number of employees at the workplace.

¹² Estimates are not seasonally adjusted.

Chart 3: Expected level of output in England, October 2011 to November 2012



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 November 2012 results compare November with February 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, November 2012

An estimated 28% of businesses in England expect output to be higher in February 2013 than it was in November 2012; 27% expect output to fall, with 41% of businesses expecting output to remain the same. This gives a positive balance of +1%, an improvement on October's results – balance score of -2%; which had been the first negative balance for expectations of output since October 2011.

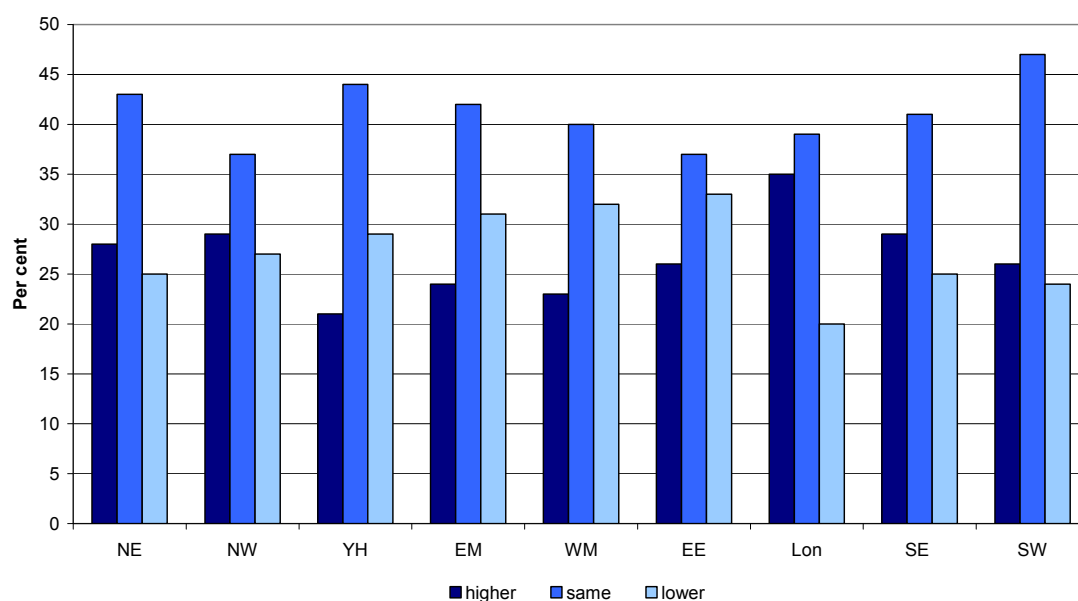
A number of regions have negative balance scores on expectations of future output, the largest negative balances coming in West Midlands (-9%), Yorkshire and the Humber (-8%) and East of England (-7%). Yorkshire and the Humber has the smallest proportion of businesses (21%) that expect output to be higher in February than in November, whilst East of England has the largest proportion of businesses (33%) that expect output to be lower.¹³

Expectations in London continue to be more optimistic than those in the rest of England. London has a positive balance on expectations of output of +15%, with the second highest balance score found in the South East (+4%). London has the highest proportion of businesses expecting output to be higher in February than November (35%) and the lowest proportion expecting output to be lower (20%).¹⁴

¹³ These results were statistically significantly different to England.

¹⁴ These results were statistically significantly different to England.

Chart 4: Expected level of output in England, by region, November 2012



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 November 2012 results compare November with February 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, November 2012

Micro businesses (-8%) and large businesses (-3%) both reported negative balance scores on expectations of future output. However, small businesses (10 to 49 employees) reported a positive balance of +10%, with a larger¹⁵ proportion (33%) of small businesses expecting output to be higher in February than November.

Employment

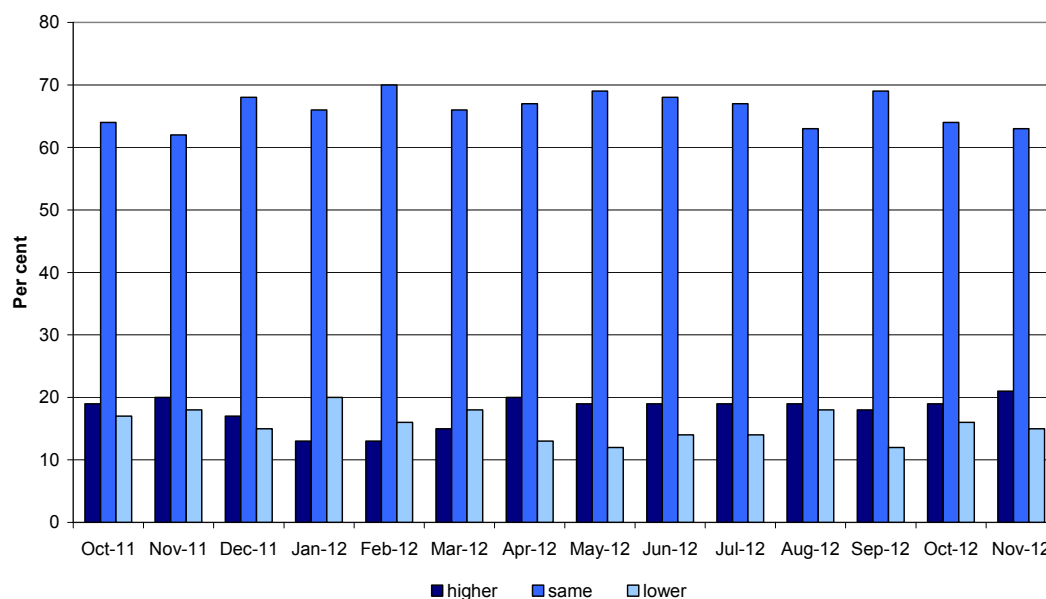
In England, most businesses reported employment levels were stable; for those businesses reporting a change in employment, a positive balance score was reported.

Over time, employment levels have been relatively stable, with businesses accounting for the majority of England's economy, estimated no change in employment¹⁶ when compared to 3 months ago (August 2012). When comparing November to August: almost two-thirds (63%) of businesses estimated employment levels to be the same; 21% estimated higher employment, whilst 15% estimated lower employment, giving an overall balance score of +7%. This represents an increase on October's results – a balance of +4%.

¹⁵ This result was statistically significantly different to England.

¹⁶ Employment level is used to describe the average number of people working at a workplace.

Chart 5: Level of employment in England, October 2011 to November 2012



Notes:

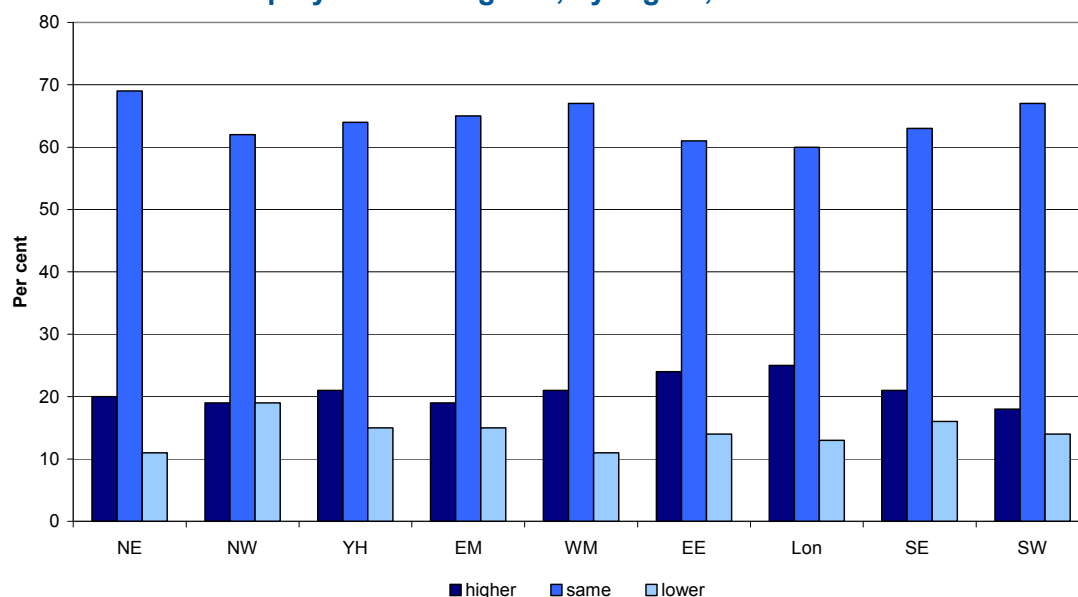
1. Workplaces were asked about the level of employment in a month three months earlier when compared to the reporting month, for example November 2012 results compare November with August 2012.
2. Estimates are not seasonally adjusted.
3. Survey results sum to 100%=(% Higher)+(% The same)+(% Lower)+(% 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, November 2012

Eight of Nine regions had positive balance scores in November, with the North West having a zero balance; the largest balance was found in London (+12%), followed by West Midlands (+10%) and East of England (+10). Results for the North East (+9%) and Yorkshire and the Humber (+6%) turned positive, when compared to October's results.

Businesses with more employees were more likely to estimate that employment levels had changed, whilst smaller businesses were more likely to report employment levels remained the same: an estimated 31% of large businesses reported increased levels of employment in November compared to August and 20% reported lower employment. However, only an estimated 9% of micro businesses reported increased employment, compared to 11% that reported lower employment – the only business size to report a negative balance score on employment.

Chart 6: Level of employment in England, by region, November 2012



Notes:

1. Workplaces were asked about the level of employment in a month three months earlier when compared to the reporting month, for example November 2012 results compare November with August 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.

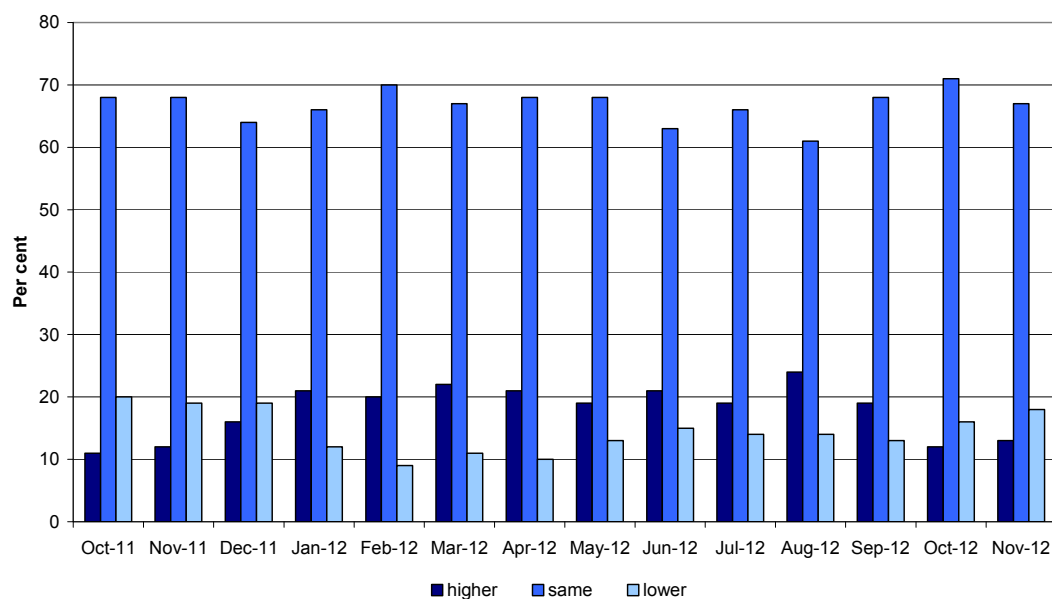
Source: BIS - English Business Survey, November 2012

Expectations of future employment levels became more pessimistic in November; when compared to November 2012, more businesses expect employment to be lower than expect employment to be higher in February 2013. However, most businesses in England anticipate fairly constant employment levels – an estimated 67% of businesses expect the number in employment to be the same in February as in November. An estimated 13% of businesses expect higher levels of employment in February, whilst 18% of businesses expect lower levels of employment in February. This gives a negative balance score of -5%, the second consecutive negative balance following nine consecutive months of positive balance scores.

All regions recorded a negative balance score for expectations of future employment apart from London (+2%) – this is similar to that reported in October's release. The largest negative balances for expectations of future employment were found in the Yorkshire and the Humber (-17%) and East Midlands (-10%). Businesses in Yorkshire and the Humber were significantly less likely to expect employment to be higher in February when compared to November (9%) and more likely to expect employment to be lower (26%).¹⁷

¹⁷ These results are statistically significantly different to England.

Chart 7: Expected level of employment in England, October 2011 to November 2012

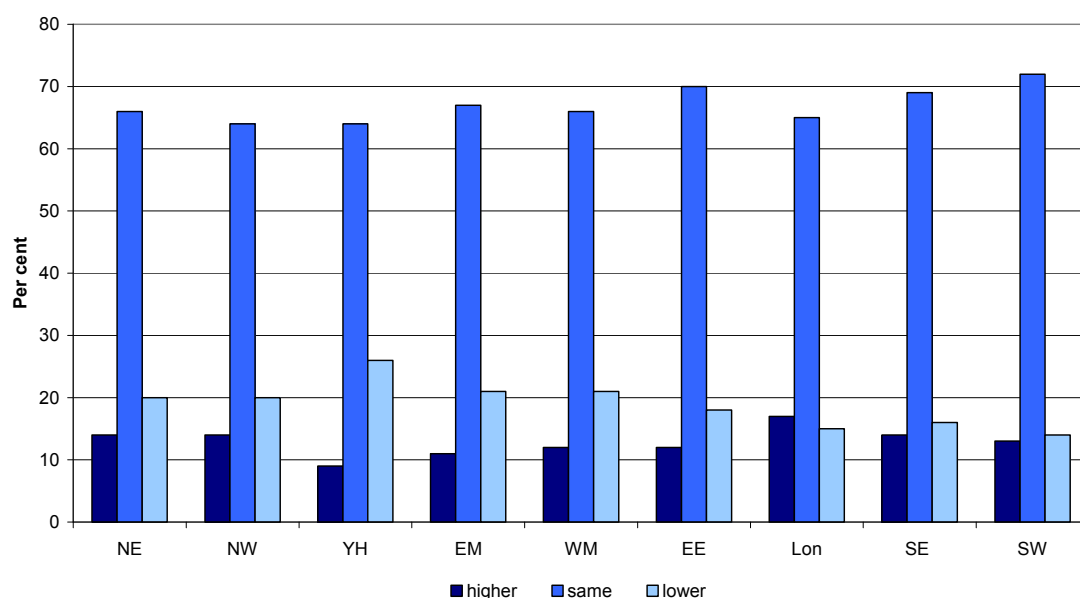


Notes:

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 November 2012 results compare November with February 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, November 2012

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



Notes:

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 November 2012 results compare November with February 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, November 2012

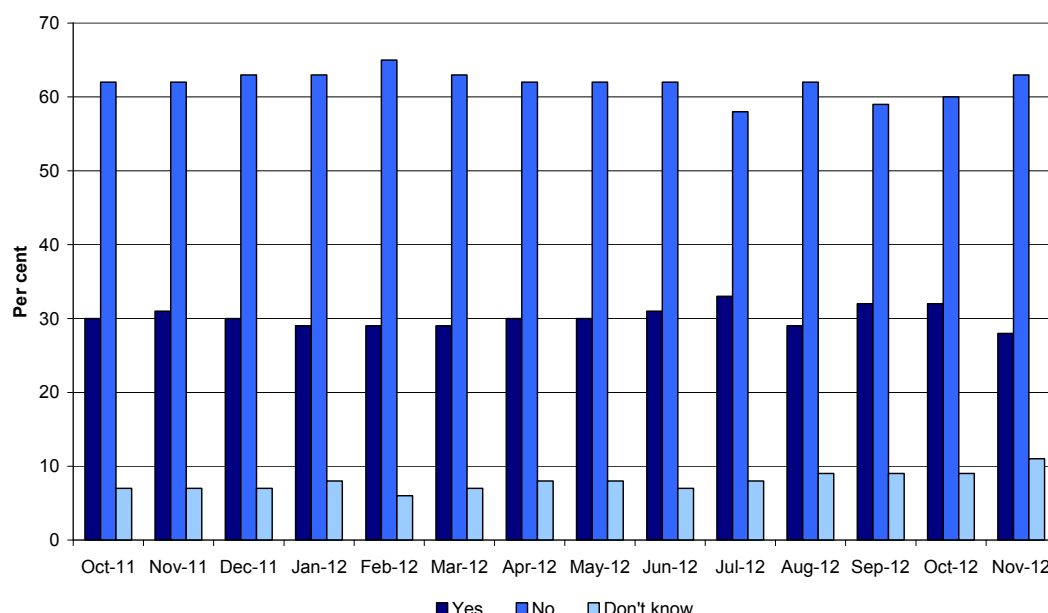
Larger businesses were more likely to expect changing employment levels and smaller businesses to expect stable employment levels – this is a similar pattern to that of reported (backward-looking) employment levels.

Capital Investment

In November 2012, the proportion of businesses that have made new capital investment fell to its lowest level since the survey began in October 2011.

In England, an estimated 28% of businesses made new capital investment¹⁸ in the three months from September to November 2012. An estimated 63% of businesses reported no new capital investment over the same period.

Chart 9: Capital investment in England, October 2011 to November 2012



Notes:

1. Workplaces were asked whether they made any new capital investment in the previous three months, for example November 2012 results ask about the period September to November 2012.
2. Estimates are not seasonally adjusted.

Source: BIS - English Business Survey, November 2012

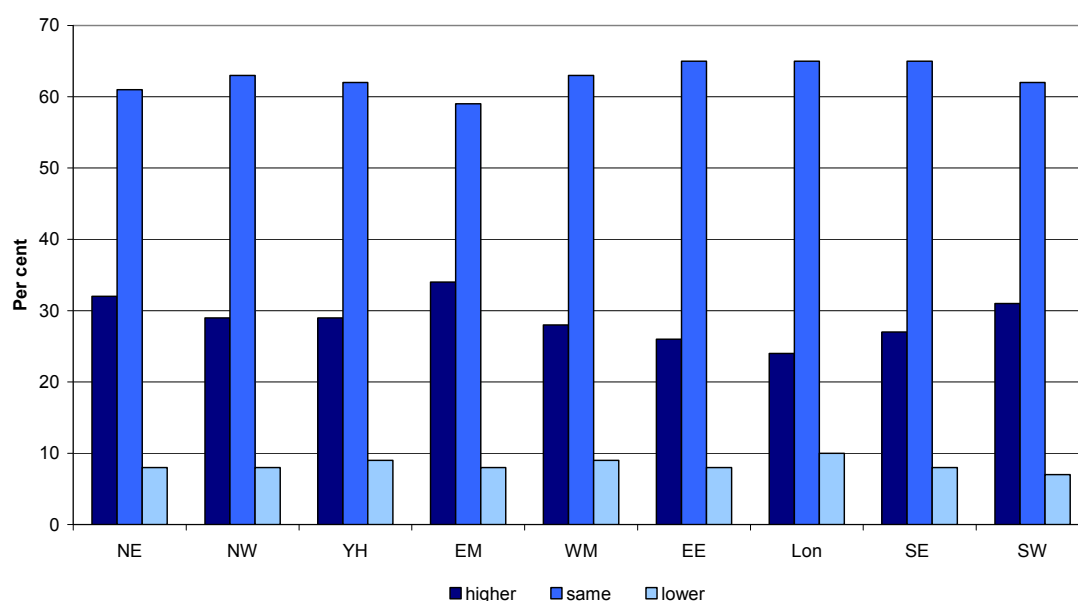
The fall in capital investment appears to have been most marked amongst larger businesses. Whilst larger businesses are more likely to have made capital investment than smaller businesses, there was a fall in the proportion of businesses of 250 or more employees that made capital investment over

¹⁸ 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.

the preceding three months, from an estimated 41% in October to 36% in November.¹⁹ Similarly there was a fall in the proportion of medium sized businesses of 50 to 249 employees, from an estimated 40% in October to 33% in November.

The regions in which businesses were most likely to have made new capital investment were East Midlands (34%), the North East (32%) and South West (31%), whilst businesses in London (24%) were least likely to have made new capital investment. However, none of these regional differences were statistically significant.

Chart 10: Capital investment in England, by region, November 2012



Notes:

1. Workplaces were asked whether they made any new capital investment in the previous three months, for example November 2012 results ask about the period September to November 2012.
2. Estimates are not seasonally adjusted.

Source: BIS - English Business Survey, November 2012

Looking ahead, an estimated 26% of businesses in England expect to make new capital investment between December 2012 and February 2013. This represents the same level of expectation reported in the September and October surveys.²⁰ There is little difference between regions on expectations of future capital investment with balance scores ranging from 7%²¹ in the South West to 12% in West Midlands, London and the South East.

In England, an estimated 29% of businesses with 250 or more employees expect to invest in new capital – down from the 39% reported in October's

¹⁹ Results are not adjusted for seasonality.

²⁰ Results are not adjusted for seasonality.

²¹ This result is statistically significantly different to England.

release.²² However amongst micro businesses, there has been an improvement in the level of expectations, with 21%²³ expecting to invest in new capital compared to 14% in October.²⁴

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-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. Monthly Purchasing Managing Index (PMI) figures reported slight contractions in manufacturing and construction over the three months to November, whilst the service sector continued to expand although the rate of expansion slowed in October and November.²⁵

The Confederation of British Industry (CBI)'s *Industrial Trends* survey reports a negative balance of expectations, with a larger proportion of respondents expecting output to fall than expecting output to rise over the next three months over comparable periods to the November EBS release. However, EBS samples businesses across a wider set of sectors²⁶. The British Chambers of Commerce (BCC) shows a small increase in domestic sales over Quarter 3 2012 but indicates that domestic orders fell in the same period.²⁷

Employment data from the surveys is broadly in line with the EBS, the BCC shows employment increased in Quarter 3 2012 and predicts employment will continue to increase in Quarter 4 2012. Official statistics show employment has increased, with corresponding falls in the unemployment rate.

²² Results are not adjusted for seasonality.

²³ This result is statistically significantly different to England.

²⁴ Results are not adjusted for seasonality.

²⁵ <http://www.markiteconomics.com/Survey/Page.mvc/AboutPMIData>

²⁶ <http://www.cbi.org.uk/business-issues/economy/business-surveys/industrial-trends-survey/>

²⁷ <http://www.britishchambers.org.uk/policy-maker/policy-reports-and-publications/quarterly-economic-survey-q3-2012.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 Questionnaire²⁸ 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 webpage²⁹.

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 ebsurvey@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 adjustment³⁰. 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 January 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

²⁸ <http://www.bis.gov.uk/assets/biscore/statistics/docs/e/12-601-english-business-survey-report-questionnaire-development.pdf>

²⁹ <http://www.bis.gov.uk/analysis/statistics/sub-national-statistics/ebsurvey>

³⁰ The recommended approach for removing seasonality in UK Official Statistics requires three years of monthly data or 5 years of quarterly data.

and employment³¹. This is designed to capture the importance of the 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 Guide³², which provides information about how to interpret results, and a Technical Annex³³, 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-registered³⁴ businesses. This is potentially important as such businesses make up a significant proportion of the overall business population (55% of businesses) although they account for a smaller share of employment (12%) and turnover (3%)³⁵.

³¹ The characteristics used for weighting include: location (NUTS2 Region) and employment size (0-49, 50-249 and 250+).

³² <http://www.bis.gov.uk/assets/biscore/statistics/docs/e/12-598-english-business-survey-user-guide.pdf>

³³ <http://www.bis.gov.uk/assets/biscore/statistics/docs/e/12-602x-english-business-survey-technical-annex.pdf>

³⁴ Non-registered businesses are not registered for either PAYE or VAT, which means they are generally, the very smallest non-employing businesses.

³⁵ Statistics on the non-registered businesses are taken from Business Population Estimates for the UK and Regions 2012

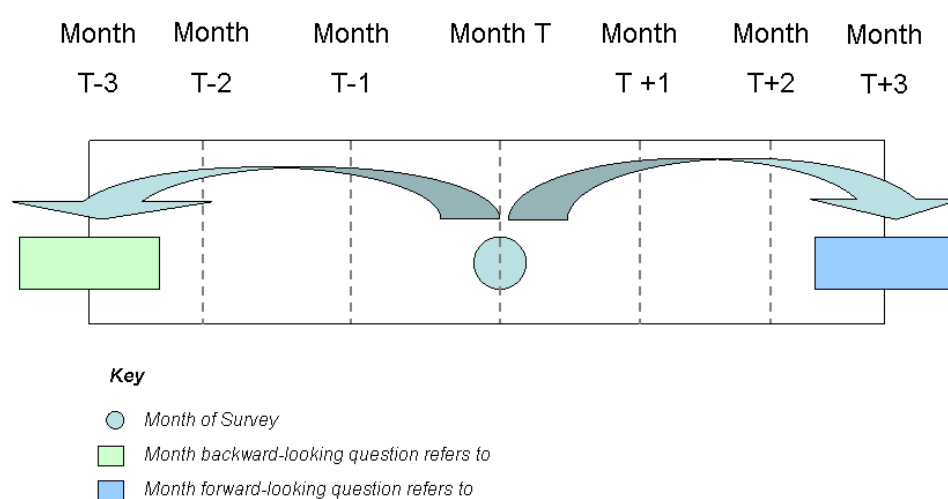
Interpreting the results

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 December 2012 with September 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 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

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 Hub³⁶.

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 Tool³⁷ allows users to access detailed EBS statistics for individual periods (months and quarters) as well as cumulative periods, starting in October 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 Laboratory³⁸ and an aggregated version of the dataset is available to academics from the UK Data Archive³⁹.

Contact details

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

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³⁶ <http://www.statistics.gov.uk/hub/index.html>

³⁷ <http://dservuk.tns-global.com/English-Business-Survey-Reporting-Tool/>

³⁸ <http://www.ons.gov.uk/ons/about-ons/who-we-are/services/vml/index.html>

³⁹ <http://www.data-archive.ac.uk/>

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