

BUSINESS AND ENERGY

Business Insights and Conditions Survey (BICS) Weighted Scotland Estimates - Data to Wave 54

29 April 2022

This is the 40th publication of weighted Scotland estimates from the ONS' BICS. These are experimental statistics, which means that they are still in development but have been released to enable their use at an early stage. All results are provisional and subject to revision.

Latest main findings for businesses with 10+ employees and a presence in Scotland

- In the period 4 April to 17 April 2022 (Wave 54), the share of businesses 'currently trading' was estimated at 99.5%, up from 98.7% in Wave 53 (21 March to 3 April 2022).
- In Wave 54, the share of businesses reporting that they were fully trading was estimated at 97.3%, up from 94.3% in the previous period. In Wave 54, the Accommodation & Food Services and Arts, Entertainment & Recreation industry sectors had the lowest shares of "fully trading" businesses, estimated at 91.4% and 94.7% respectively.
- In Wave 54, an estimated 35.2% of businesses reported experiencing a shortage of workers. 69.6% of businesses reported that the shortage of workers has resulted in employees working increased hours, and 39.1% of businesses reported that they have been unable to meet demands due to a shortage of workers.
- In Wave 54, Hygiene Measures (69.4%), Personal Protective Equipment (PPE) (59.7%) and Social Distancing (51.3%) continued to be the workplace safety measures most frequently reported by businesses. Rates across all safety measures have decreased compared to the previous period.
- The main concerns for businesses in April 2022 were energy prices (28.3%) and inflation of goods and services prices (25.3%).

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Introduction

The ONS' BICS is a voluntary fortnightly business survey, which captures businesses' responses on how their turnover, workforce, prices, trade and business resilience have been affected by current conditions, including the coronavirus (COVID-19) pandemic and the end of the EU transition period.

BICS stands for the Business Insights and Conditions Survey (BICS) – previous to Wave 24, the survey was called "Business Impact of Coronavirus (COVID-19) Survey". The BICS was renamed to reflect the current question set, which goes wider than the impact of the coronavirus (COVID-19).

Currently, the main [Scottish BICS results published by the Office for National Statistics](#) are unweighted which means that we can only make inferences about the businesses that have responded.¹ Weighting the BICS responses enables us to produce estimates for Scottish businesses more generally, not just those that have responded. The ONS has provided the Scottish Government with the BICS microdata², which we have used to develop the weighted Scotland estimates. More information on the weighting method we have used for these early estimates and our plans for future developments is provided here: [BICS weighted Scotland estimates: data to wave 12](#).

The weighted Scotland estimates, in this publication, are for businesses with 10 or more employees. The weighted Scotland estimates are for businesses that have a presence in Scotland, as opposed to only those businesses headquartered in Scotland. Having a presence in Scotland means that the business has a local unit or site (e.g. shop, office, factory) in Scotland. In terms of the base of the estimates, 9,328 businesses responded to the Wave 53 BICS UK-wide (9,111 businesses in Wave 54). In Wave 53, 1,233 of these businesses had a presence in Scotland (1,226 businesses in Wave 54). Excluding the micro businesses (those with less than 10 employees) takes the base for the weighted Scotland estimates down to 1,116 responding businesses in Wave 53, and 1,095 responding businesses in Wave 54. The weighted Scotland estimates are derived from results collected from UK businesses for the UK as a whole, but weighted by business counts or employment in Scotland - no account is being made for regional differences between business sites.

The coverage of the ONS BICS includes most sectors of the Scottish economy; however, the public sector is excluded, as is 'Section A – Agriculture, forestry & fishing', 'Section D – Electricity, gas, steam & air conditioning supply' and 'Section K – Financial & insurance activities'.

Please note, from Wave 54, ONS have rationalised the number of questions asked each wave and references to "normal expectations" have been replaced with a defined reference period for businesses to compare against. Please find further details of these changes within the blog: [Times they are a-changing: and with them, two key ONS surveys](#).

¹ Note that on the 17th of February 2022 ONS published [Understanding the business impacts of local and national restrictions, UK: February 2022](#) – this provides an analysis of weighted data for areas within the UK (including Scotland). This latest ONS sub-national analysis breaks down the business base into single-site and multi-site businesses. This differs to the approach taken for the Scottish Government estimates presented here which include single-site and multi-site businesses together, and the Scottish Government estimates are constrained to businesses with 10 or more employees.

² The BICS microdata can be accessed, by accredited researchers, via the [Secure Research Service \(SRS\)](#).

Trading Status

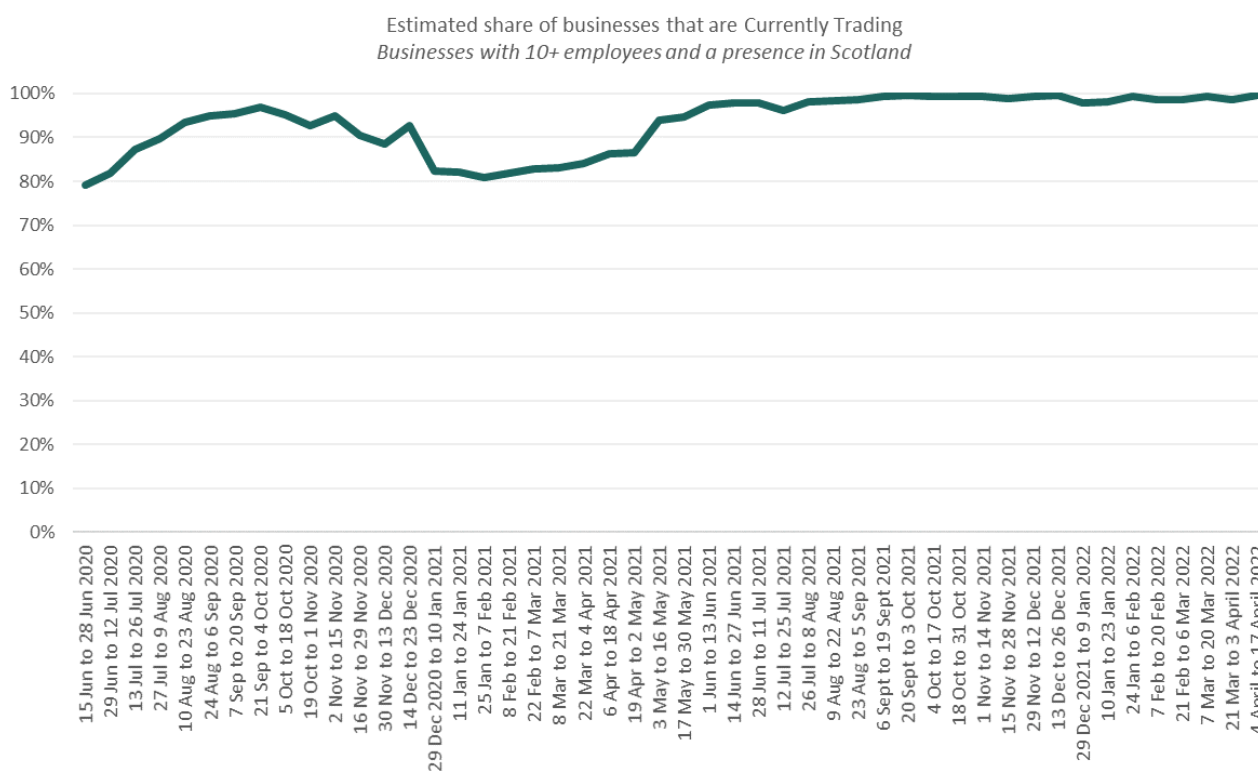
The BICS asks businesses about their trading status: the specific question³ asked is shown below. Businesses were asked for their current trading status at the time of completion of the survey questionnaire (4 April to 17 April 2022 in Wave 54, and 21 March to 3 April 2022 in Wave 53).

Trading Status Question: Which of the following statements best describes your business's trading status?

- Currently fully trading
- Currently partially trading
- Paused trading but intends to restart in the next two weeks
- Paused trading and does not intend to restart in the next two weeks
- Has permanently ceased trading

'Currently fully trading' and 'Currently partially trading' have been combined to 'Currently Trading'.

Figure 1: In the period 4 April to 17 April 2022 (Wave 54), the share of businesses 'currently trading' was estimated at 99.5%, up from 98.7% in Wave 53 (21 March to 3 April 2022).



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 7 to Wave 54

³ The ONS publishes all the questions for each wave at:

<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/conditionsanddiseases/articles/businessimpactofcovid19surveyquestions/previousReleases>

Figure 2: In Wave 54, the share of businesses reporting that they were fully trading was estimated at 97.3%, up from 94.3% in the previous period. In Wave 54, the Accommodation & Food Services and Arts, Entertainment & Recreation industry sectors had the lowest shares of “fully trading” businesses, estimated at 91.4% and 94.7% respectively.



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 54

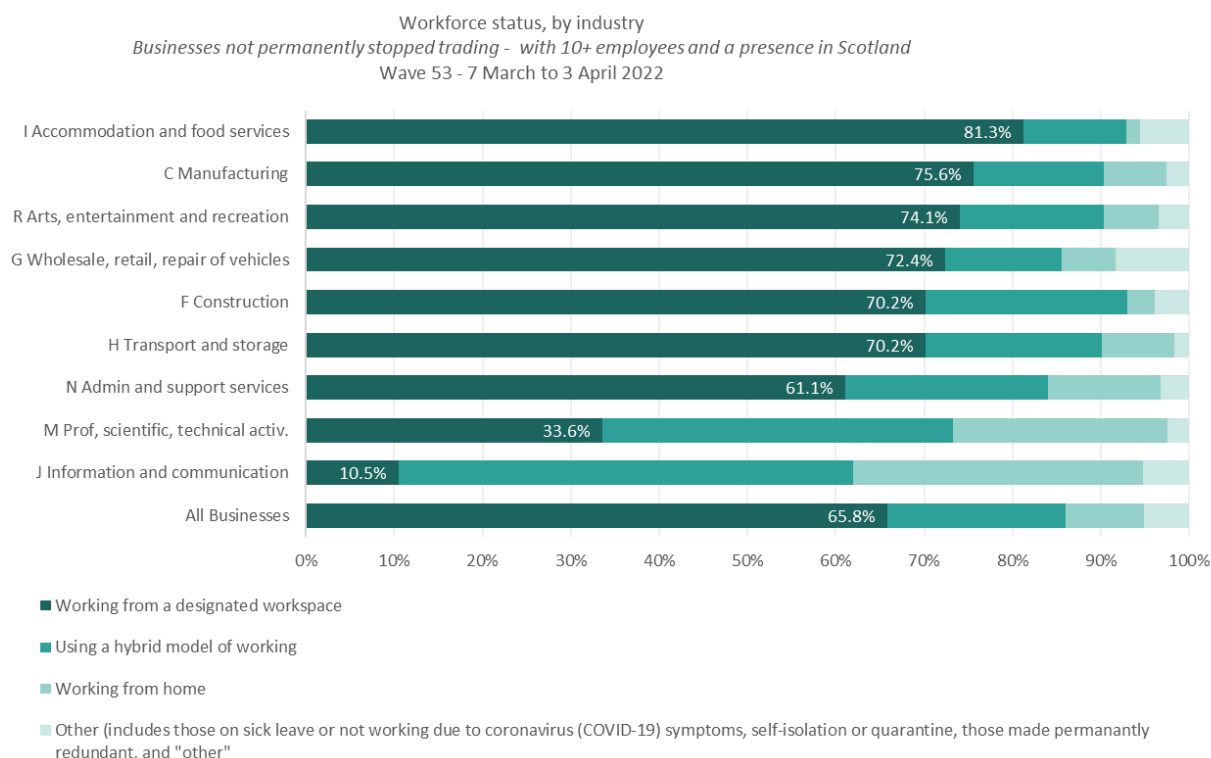
Workforce Status

In Wave 53 the BICS asked businesses about the status of their workforce. Note that businesses were asked about the status of their workforce in the last two weeks and so responses will be from the time of completion of the survey questionnaire (21 March to 3 April 2022 for Wave 53) with the full question reference period (looking back at the last two weeks) covering 7 March to 3 April 2022 for Wave 53. Note that the Workforce Status question was not asked in Wave 54.

Workforce Status Question: In the last two weeks, approximately what percentage of your business’s workforce were:

- Working from a designated workspace
- Made permanently redundant
- Using a hybrid model of working
- Working from home
- On sick leave or not working due to coronavirus (COVID-19) symptoms, self-isolation or quarantine
- Other

Figure 3: In Wave 53, 65.8% of the workforce were estimated to be working from a designated workspace, 20.2% to be using a hybrid model of working and 8.9% working from home. In the latest period, the industry sectors with the lowest proportion of the workforce working from a designated workspace were the Information & Communication and Professional, Scientific & Technical Activities sectors, estimated at 10.5% and 33.6% respectively – with these sectors having the highest rates of hybrid working and home working.



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 53

In Wave 53, 2.6% of the workforce were estimated to be on sick leave or not working because of coronavirus (COVID-19) symptoms, self-isolation or quarantine – broadly in line with the previous period (1.8% in Wave 52). The Information & Communication industry sector reported the highest absence share at 4.4%.

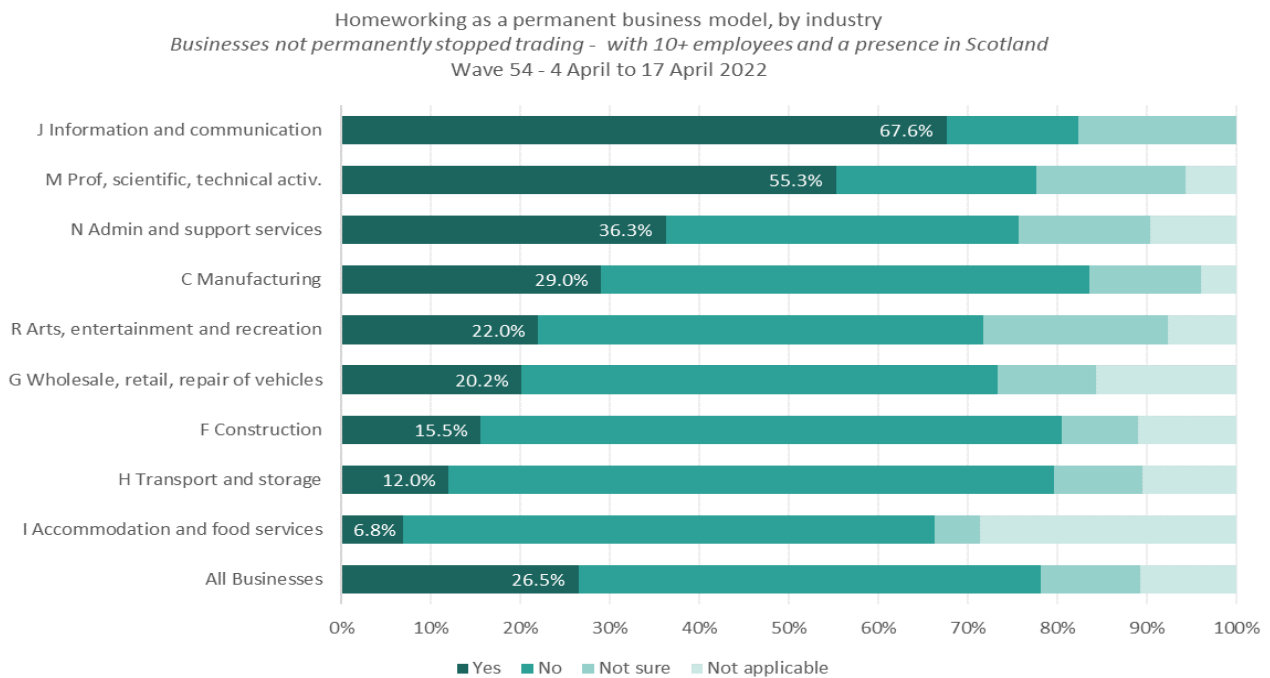
In Wave 53, businesses were asked if they are paying sick leave for the voluntary self-isolation of employees testing positive for coronavirus (COVID-19). Of businesses not permanently stopped trading, 44.3% reported that they are paying sick leave for employees, rising to 52.6% of businesses in the Construction industry sector.

Homeworking

In Wave 54 the BICS asked businesses about whether they intend to use increased homeworking as a permanent business model going forward- the specific question asked is shown below.

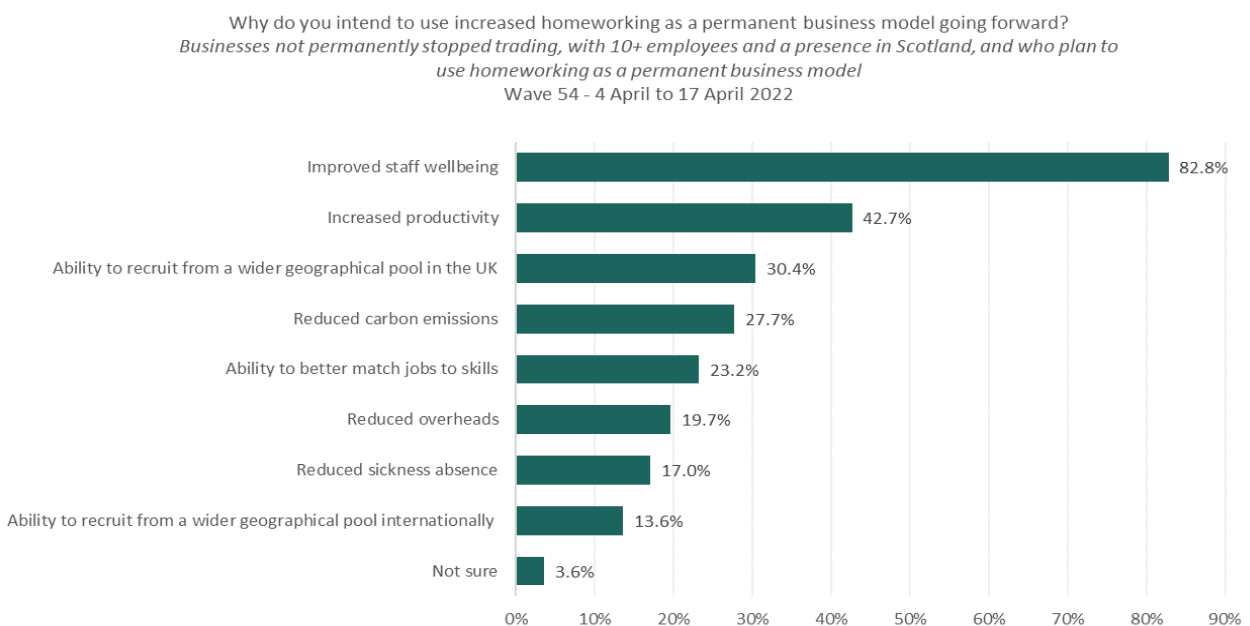
Homeworking Question: Does your business intend to use increased homeworking as a permanent business model going forward?

Figure 4: In the period 4 April to 17 April 2022 (Wave 54), the share of businesses that intend to use increased homeworking as a permanent business model was highest in the Information & Communication (67.6%) and Professional, Scientific & Technical Activities (55.3%) sectors. The rates were much lower in some other sectors, with only 6.8% of businesses in the Accommodation & Food Services sector and 12.0% of Transport & Storage businesses intending to use increased homeworking as a permanent business model.



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 54

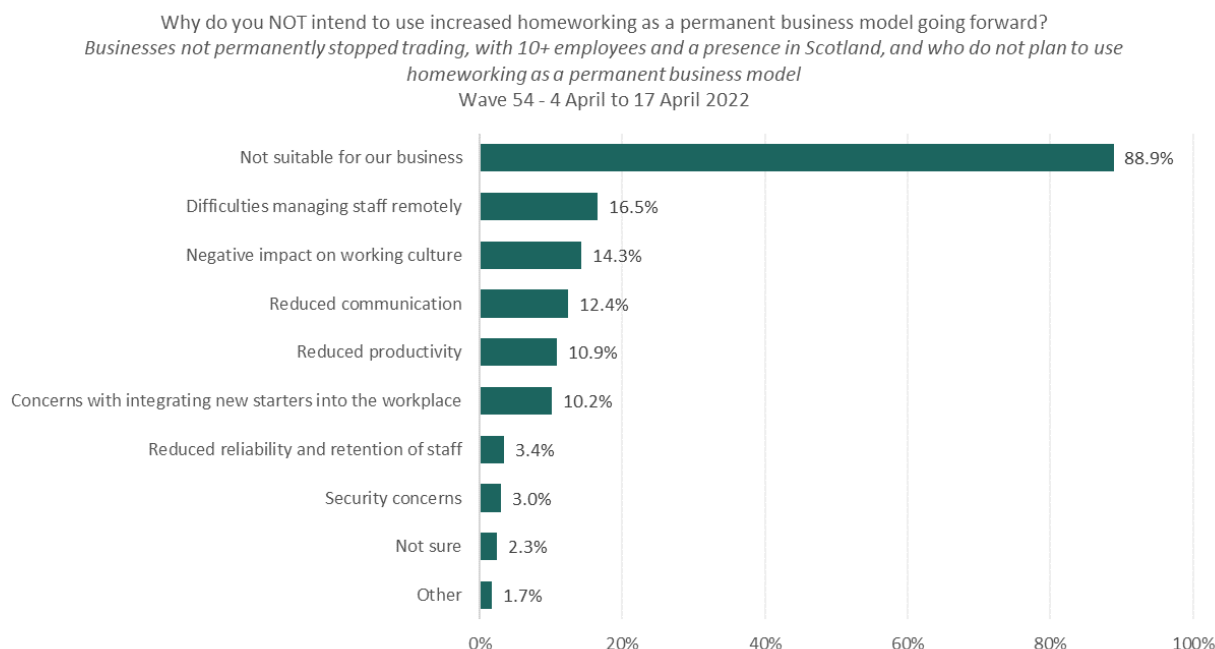
Figure 5: Improved staff wellbeing was the most commonly reported reason for using increased homeworking as a permanent businesses model going forward - this was reported by 82.8% of relevant businesses.



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 54

In Wave 54 businesses who do not plan to use increased homeworking as a permanent business model going forward, were asked about their reasons for this.

Figure 6: Homeworking not being suitable for the business was the most commonly reported reason for not using increased homeworking as a permanent businesses model going forward - this was reported by 88.9% of relevant businesses.



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 54

Worker Shortages

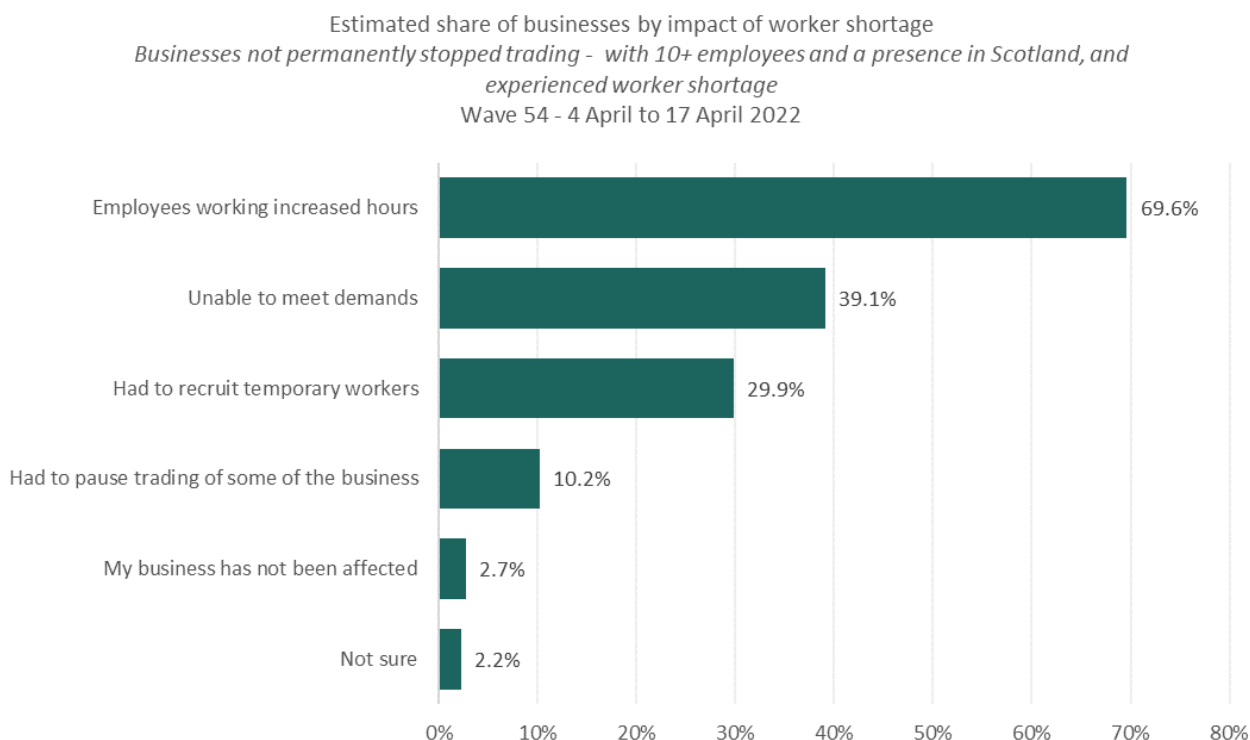
In Wave 54 businesses were asked whether they are currently experiencing a shortage of workers. An estimated 35.2% of businesses reported experiencing a shortage of workers - rising to 44.4% in the Arts, Entertainment & Recreation sector, and 49.0% in the Transport & Storage sector.

The BICS also asks businesses that are experiencing a shortage of workers, about how their businesses has been affected by this– the specific question asked is shown below.

Worker Shortage question: How has the shortage of workers affected your business?

- Employees working increased hours
- Had to pause trading entirely
- Had to pause trading of some of the business
- Had to recruit temporary workers
- Unable to meet demands
- Not sure
- My business has not been affected

Figure 7: In Wave 54, 69.6% of businesses reported that the shortage of workers has resulted in employees working increased hours, and 39.1% of businesses reported that they have been unable to meet demands due to a shortage of workers.



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 54

Financial Performance

In Wave 53 the BICS asked businesses about how turnover compares to business as usual - the specific question asked is shown below. Note that businesses were asked about the status of their turnover in the last month and so responses will be from the time of completion of the survey questionnaire (21 March to 3 April 2022 for Wave 53) with the full question reference period (looking back at the last month covering 21 February to 3 April 2022 for Wave 53). Note that the Financial Performance question was not asked in Wave 54.

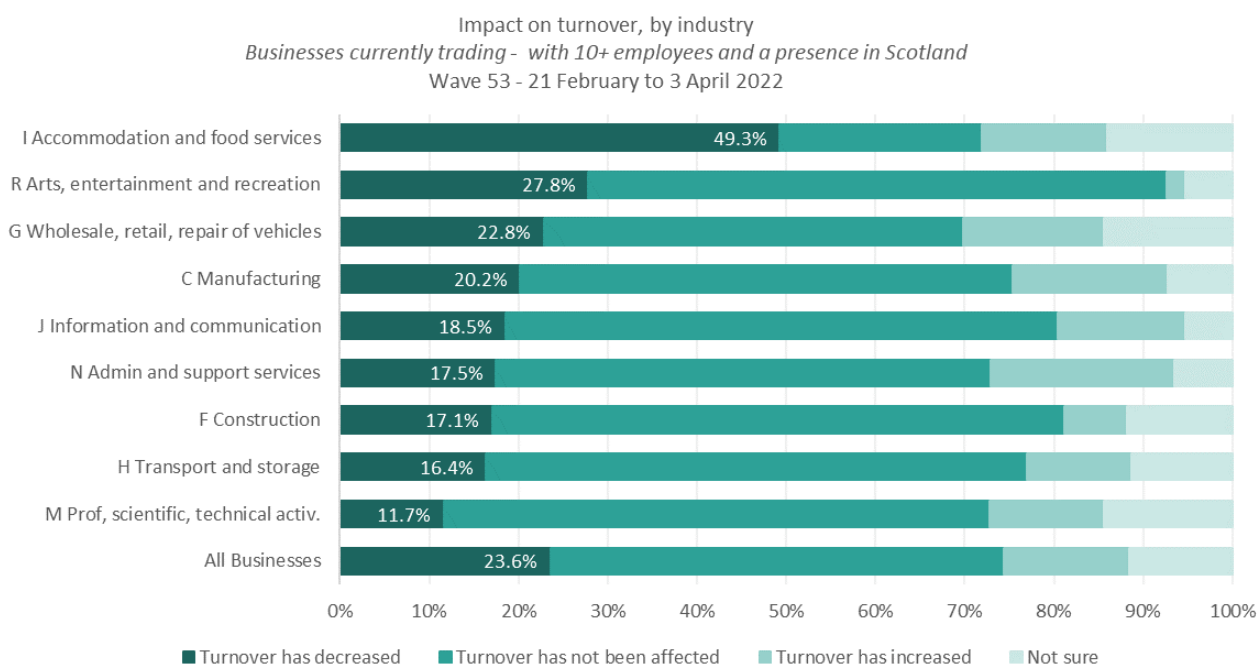
Note that in Waves 51, 50, 49, 48 and prior to Wave 41 this question asked about turnover in the last two weeks rather than the last month.

Financial Performance Question: How does turnover for the last month compare to normal expectations for this time of year?

- Turnover has increased by more than 50%
- Turnover has increased between 20% and 50%
- Turnover has increased by up to 20%
- Turnover has not been affected
- Turnover has decreased by up to 20%
- Turnover has decreased between 20% and 50%
- Turnover has decreased by more than 50%
- Not sure

For presentational purposes, increased turnover categories and decreased turnover categories have been combined. The breakdowns of these categories are available in the detailed data tables.

Figure 8: In the period 21 February to 3 April 2022 (Wave 53), 23.6% of businesses reported a decrease in turnover compared with what is normally expected. The Accommodation & Food Services industry sector continued to have the highest share of businesses experiencing a decrease in turnover compared with what is normally expected estimated at 49.3%, slightly down from the previous period (52.1% in Wave 51).



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 53

Business Resilience

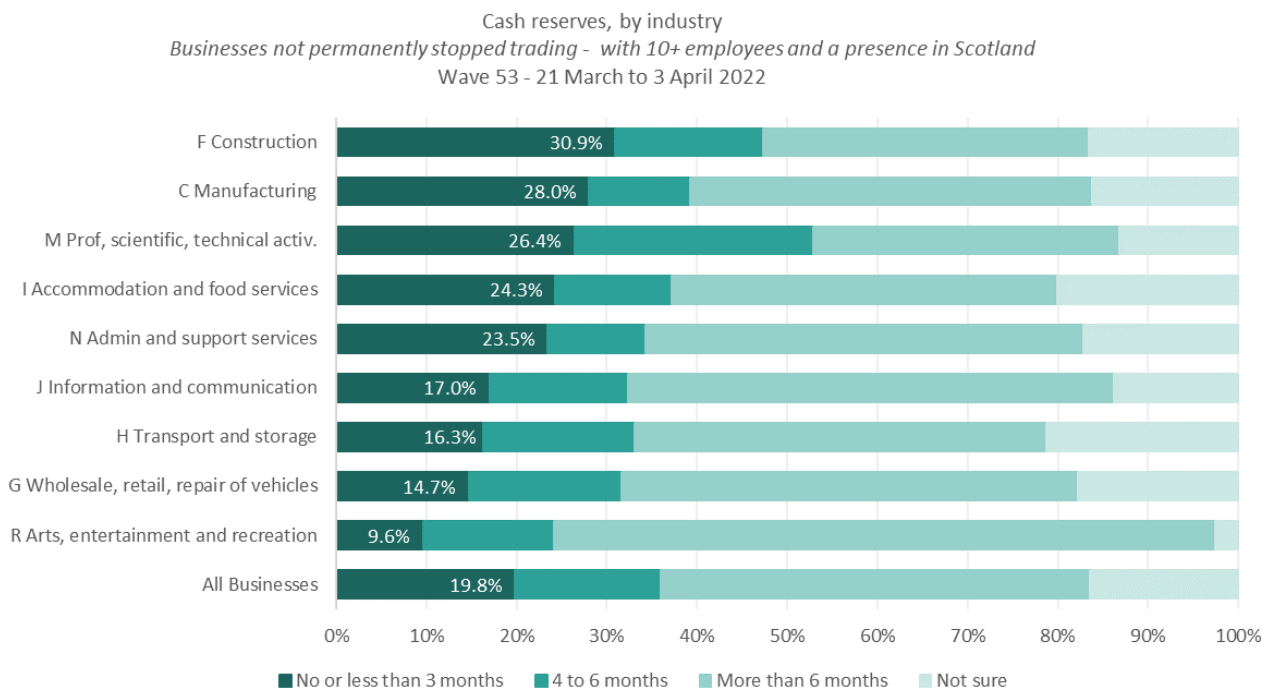
In Wave 53 the BICS asked businesses about their cash flow - the specific question asked is shown below. Note that businesses were asked about cash flow from the time of completion of the survey questionnaire (21 March to 3 April 2022 for Wave 53). Note that the Cash Flow question was not asked in Wave 54.

Question: How long do you think your business’s cash reserves will last?:

- Business has no cash reserves
- Less than 1 month
- 1 to 3 months
- 4 to 6 months
- More than 6 months
- Not sure

For presentational purposes, cash reserve categories less than three months have been combined. The breakdowns of these categories are available in the detailed data tables.

Figure 9: In Wave 53, 19.8% of businesses reported they had no or less than three months cash reserves, with the highest rates for the Construction and Manufacturing industry sectors (estimated at 30.9% and 28.0% respectively).



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 53

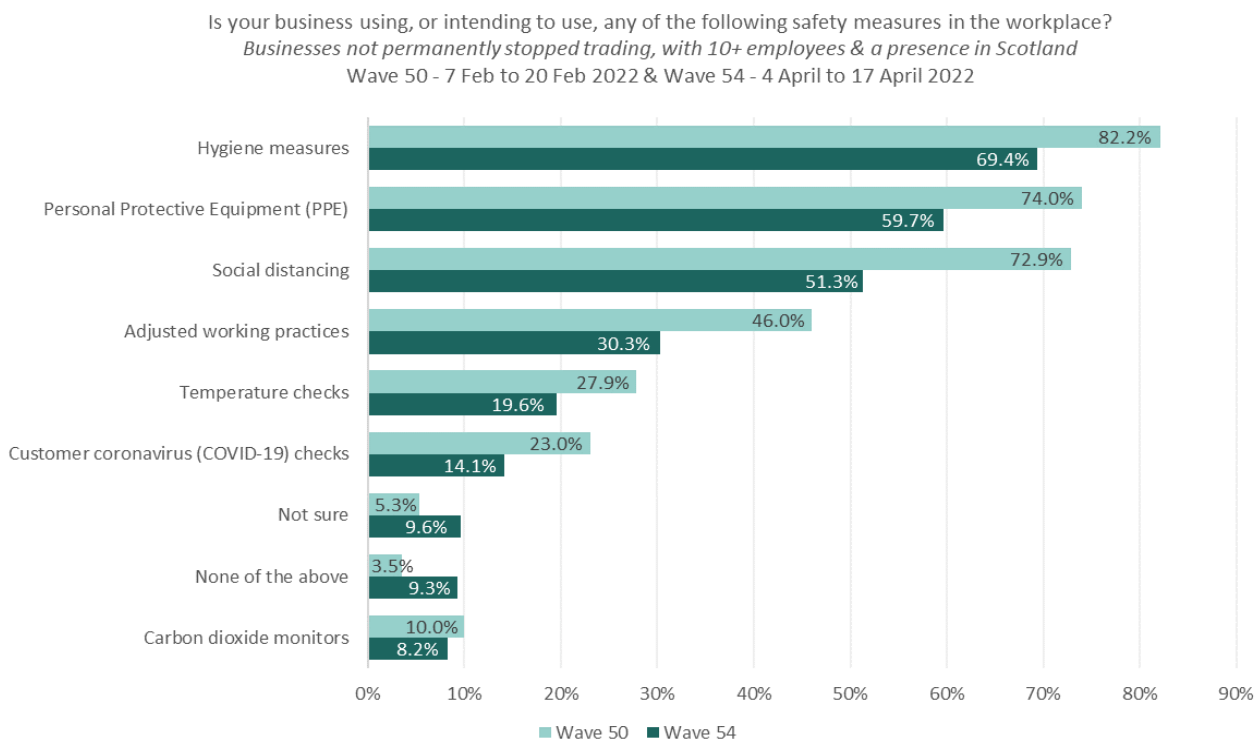
Safety Measures

In Wave 54 the BICS asked businesses whether they are using, or intending to use, any safety measures in the workplace – the specific question asked is shown below. Businesses were asked about their safety measures at the time of completion of the survey questionnaire (4 April to 17 April 2022 in Wave 54).

Safety Measures Question: Is your business using, or intending to use, any of the following safety measures in the workplace?

- Adjusted working practices
- Customer coronavirus (COVID-19) checks
- Hygiene measures
- Personal Protective Equipment (PPE)
- Social distancing
- Temperature checks
- Carbon dioxide monitors
- None of the above
- Not sure

Figure 10: In Wave 54, Hygiene Measures (69.4%), Personal Protective Equipment (PPE) (59.7%) and Social Distancing (51.3%) continued to be the workplace safety measures most frequently reported by businesses. Rates across all safety measures have decreased compared to the previous period (Wave 50, 7 February to 20 February 2022).



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 50 and Wave 54

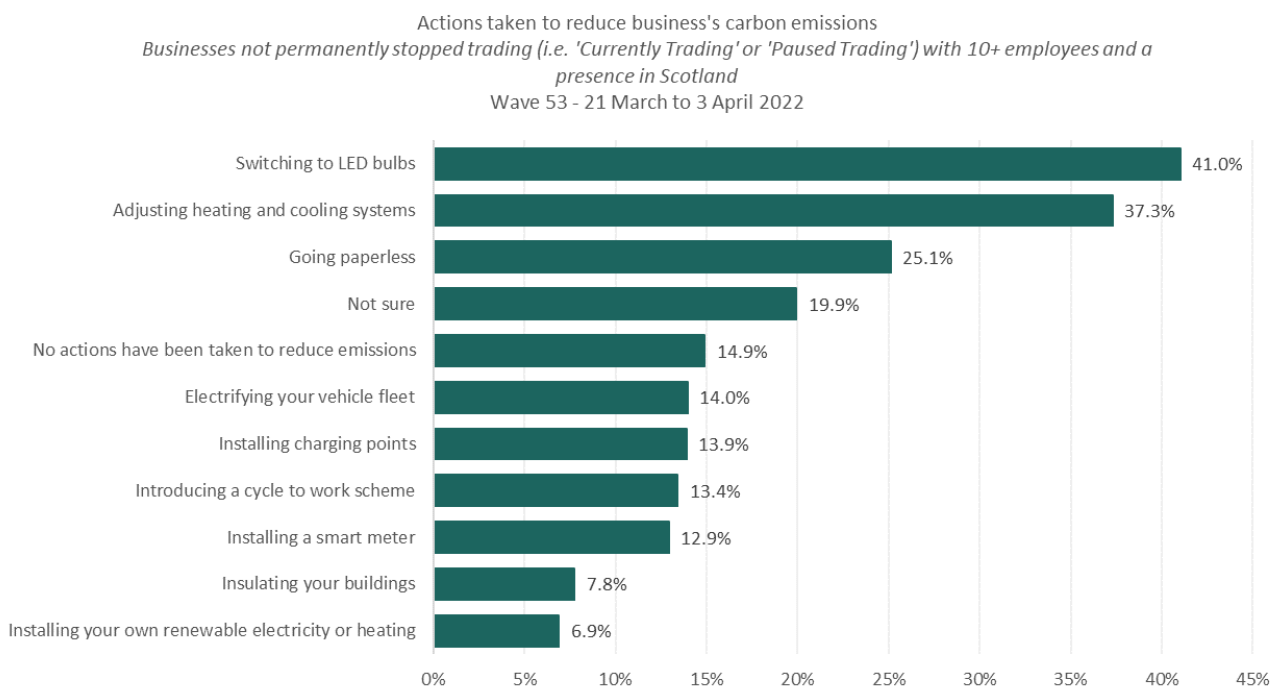
Net Zero Carbon Emissions

In Wave 53 the BICS asked businesses whether they have taken any actions to reduce the business’s carbon emissions – the specific question asked is shown below. Businesses were asked about their actions at the time of completion of the survey questionnaire (21 March to 3 April 2022 in Wave 53). Note that the Carbon Emissions question was not asked in Wave 54.

Question: Which of the following actions, if any, have you taken to reduce your business's carbon emissions?

- Adjusting heating and cooling systems
- Electrifying your vehicle fleet
- Installing a smart meter
- Installing charging points
- Installing your own renewable electricity or heating
- Insulating your buildings
- Introducing a cycle to work scheme
- Switching to LED bulbs
- Going paperless
- Not sure
- No actions have been taken to reduce emissions

Figure 11: Switching to LED bulbs (41.0%) and adjusting heating and cooling systems (37.3%) were the actions most frequently reported by businesses in the period 21 March to 3 April 2022 (Wave 53). 14.9% of businesses reported that they had taken no actions to reduce their carbon emissions.



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 53

In Wave 53, businesses were asked what actions, if any, they have taken to protect the environment – the specific question asked is shown below.

Question: Which of the following actions, if any, has your business taken to protect the environment?

- Has a climate change strategy
- Has a net zero or greenhouse gas emissions target
- Has a net zero or greenhouse gas emissions target which includes supply chain
- Has a nature or biodiversity strategy
- Has a nature or biodiversity target
- Monitors climate-related risks
- Publishes an annual sustainability report
- Not sure
- None of the above

Having a climate change strategy (12.6%) and setting a net zero or greenhouse gas emissions target (6.2%) were the actions most frequently reported by businesses. An estimated 38.0% of businesses reported that they had taken none of the actions listed.

Exporting and Importing Challenges

Wave 54

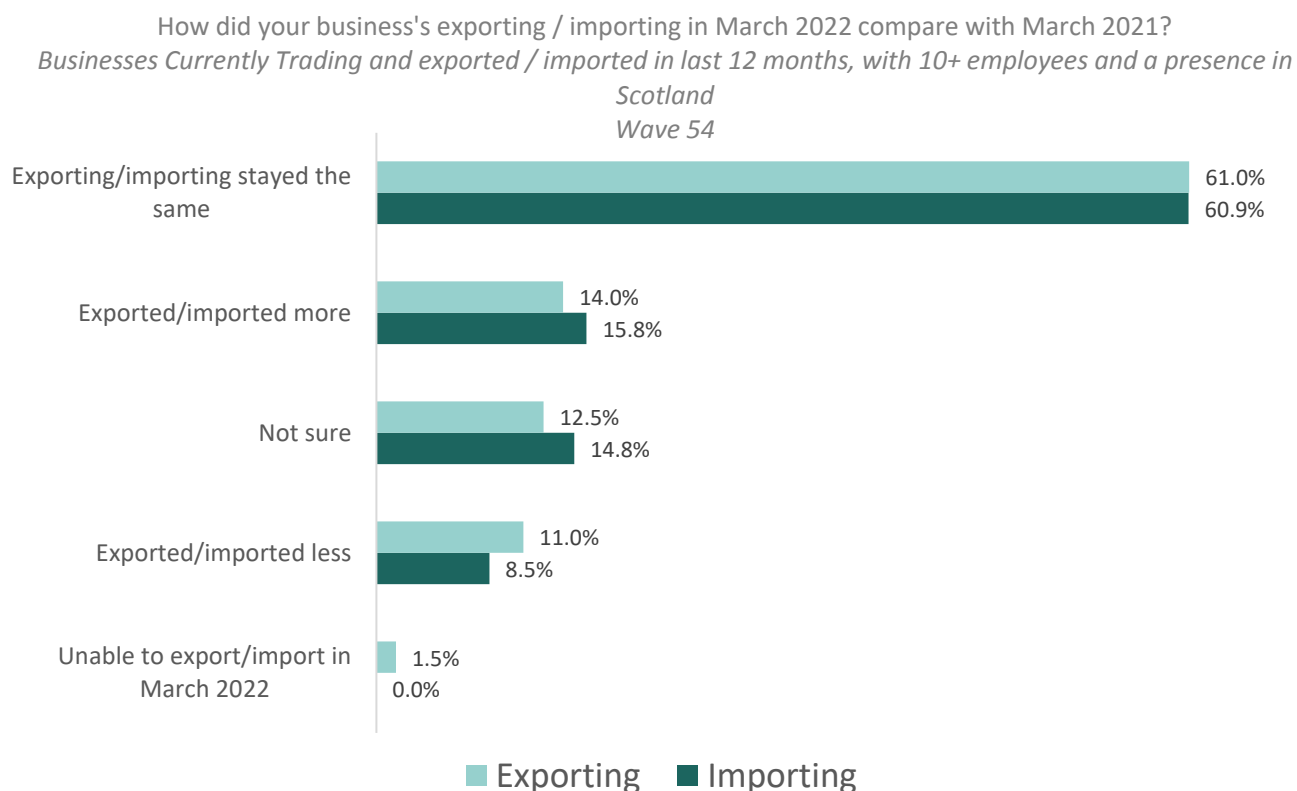
This section contains information up to Wave 54, where respondents were asked to report on their exporting and importing activity in March 2022.

The BICS asks businesses that are currently trading about how current conditions, including the end of the EU transition period, have impacted on their exporting and importing – the specific questions asked are shown below.

Question: How did your business's exporting / importing in March 2022 compare with March 2021?

- Exported/imported more
- Exporting/importing stayed the same
- Exported/imported less
- Unable to export/import in March 2022
- Not sure

Figure 12: In the latest period, of businesses currently trading that have exported or imported in the last 12 months, 11.0% reported exporting less in March 2022 compared to March 2021, and 8.5% reported importing less during this period.



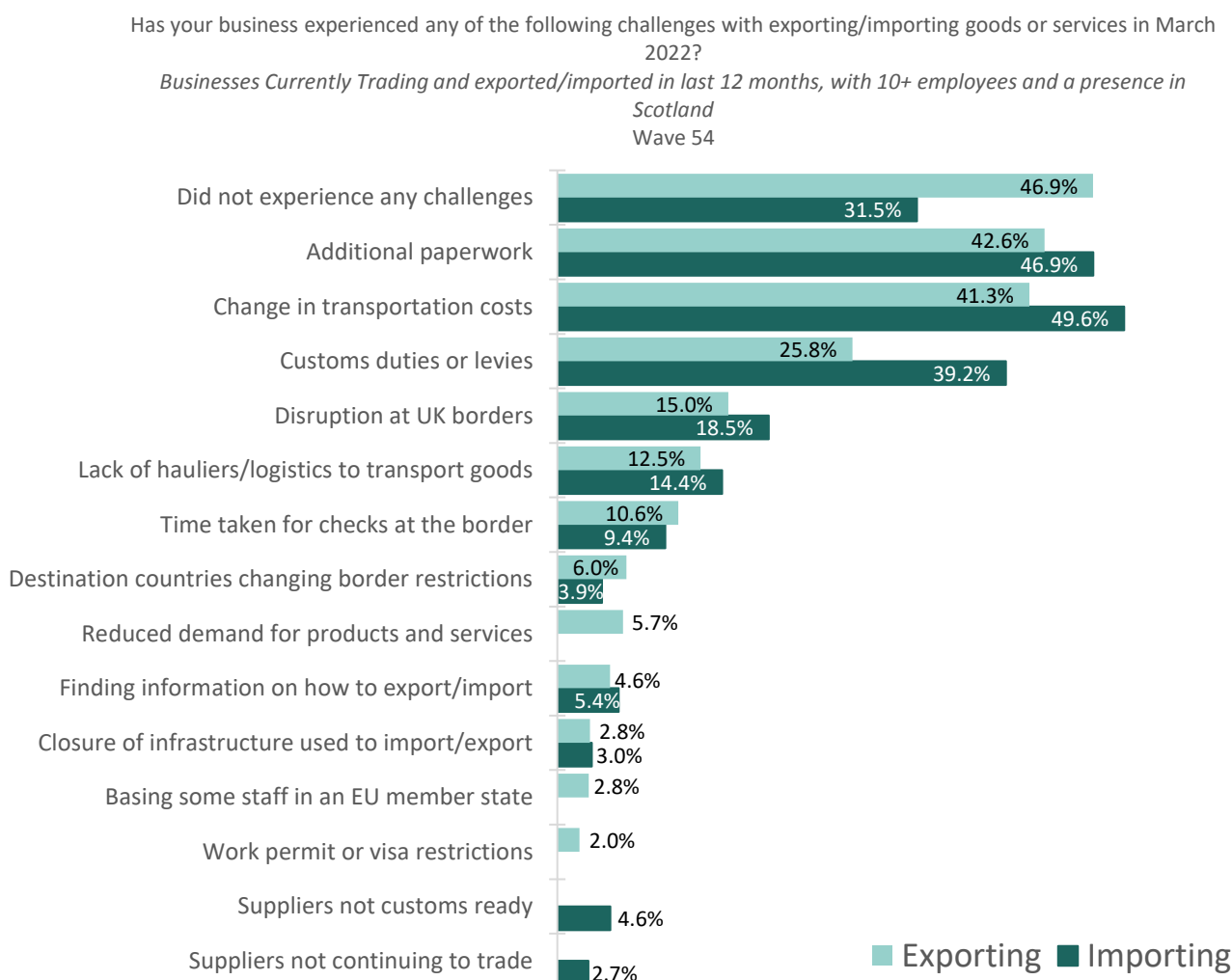
Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 54

In the latest period, 61.0% of currently trading businesses reported exporting had stayed the same, and a very similar proportion (60.9%) reported that importing had stayed the same in

March 2022 compared to March 2021. An estimated 14.0% of exporters and 15.8% of importers reported that they had exported/imported more in March 2022 compared to March 2021, which is a larger proportion than those who reported that they exported/imported less during this period.

Currently trading businesses that have exported or imported in the last 12 months, and who reported on their exporting or importing in March 2022, were asked about the challenges they had experienced in doing so.

Figure 13: The most commonly reported challenge for exporting in March 2022 was additional paperwork, whereas for importing the most commonly reported challenge was change in transportation costs.



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 54

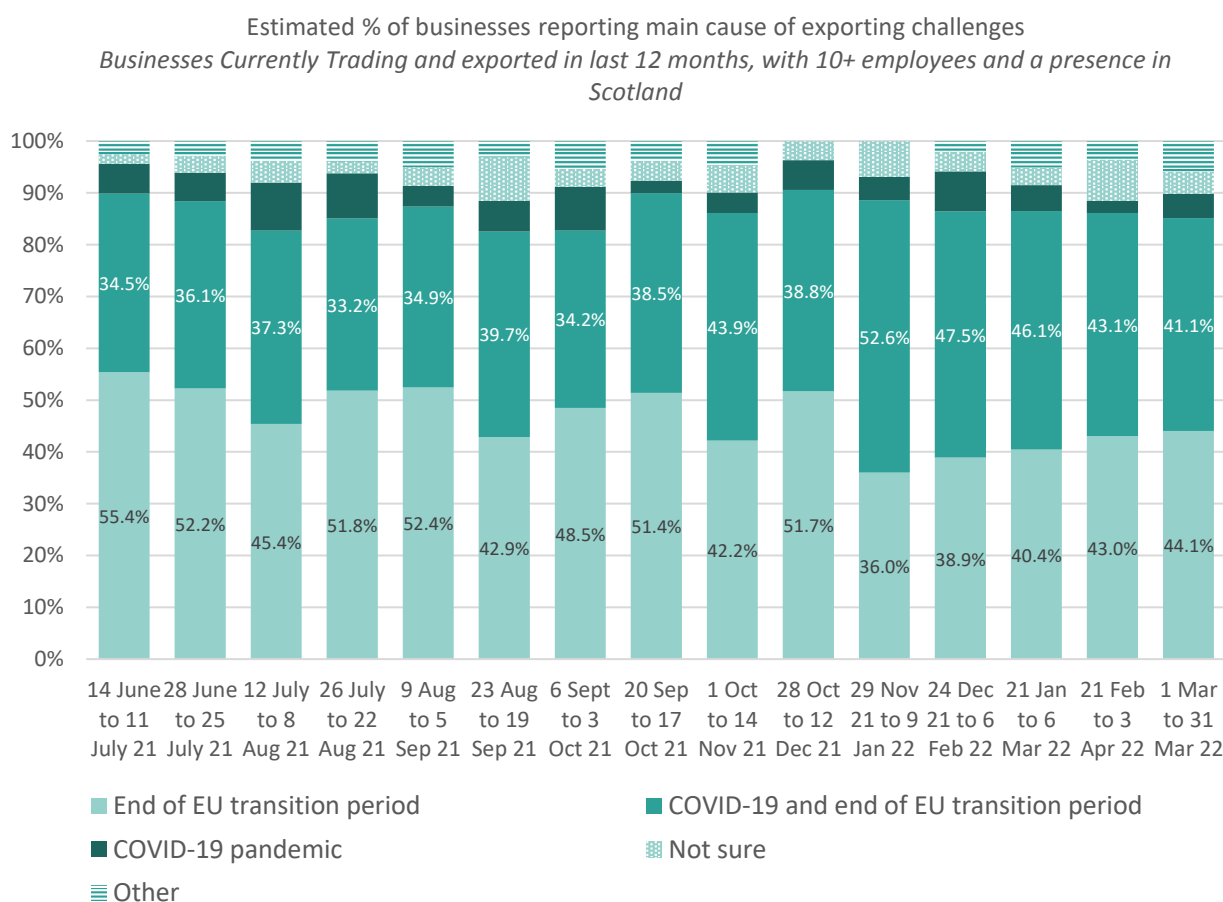
The other main challenge for exporting and importing was customs duties or levies. However, 46.9% of exporters and 31.5% of importers did not experience any challenges. The percentage of exporters reporting no challenges has generally increased since January 2022 (31.5% in Wave 47), but remains lower than in January 2021 (53.6% in Wave 22). Businesses reporting no challenges with importing is lower than in February 2022 (40.6% in Wave 49 compared to 31.5% in Wave 54).

Businesses that reported experiencing challenges with exporting in March 2022 were asked about the main cause of these challenges.

Question: What was the main cause of these exporting challenges?

- Coronavirus (COVID-19) pandemic
- End of the EU transition period
- Coronavirus (COVID-19) pandemic and the end of the EU transition period
- Other
- Not sure

Figure 14: The proportion of businesses reporting EU exit as the main cause of exporting challenges has increased from 36.0% in the period 29 November to 9 January 2022 (Wave 47) to 44.1% in March 2022 (Wave 54).



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Waves 34 to 41, 43, 45, 47, 49, 51, 53, 54.

The biggest reported cause of challenges to importing was EU exit, with 44.2% of businesses reporting this as the main cause of importing challenges in March 2022. This proportion has also increased in over recent periods (36.3% in Wave 47).

Wave 53

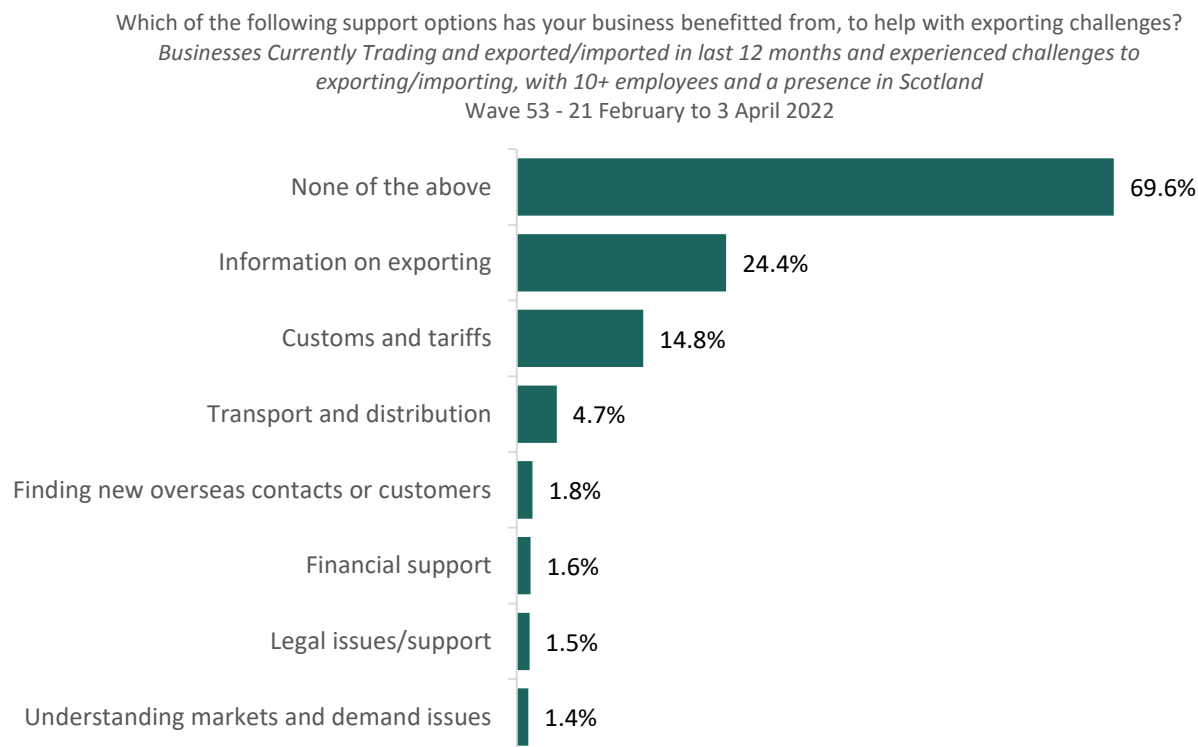
This section contains information up to Wave 53, which covers the period from 21 February to 3 April 2022.

Relevant businesses who experienced exporting challenges were asked about support options their business has benefitted from to help with these challenges.

Question: Which of the following support options has your business benefitted from, to help with exporting challenges?

- Customs and tariffs
- Export licences
- Financial support
- Finding new markets
- Finding new overseas contacts or customers
- Legal support
- Transport and distribution
- Understanding markets and demand issues
- Information on exporting
- Other
- None of the above

Figure 15: In the period 21 February to 3 April 2022 (Wave 53), the support options that businesses most commonly reported benefitting from were information on exporting (24.4%), and customs and tariffs (14.8%). However, 69.6% of businesses did not benefit from any of these options to help with exporting challenges.



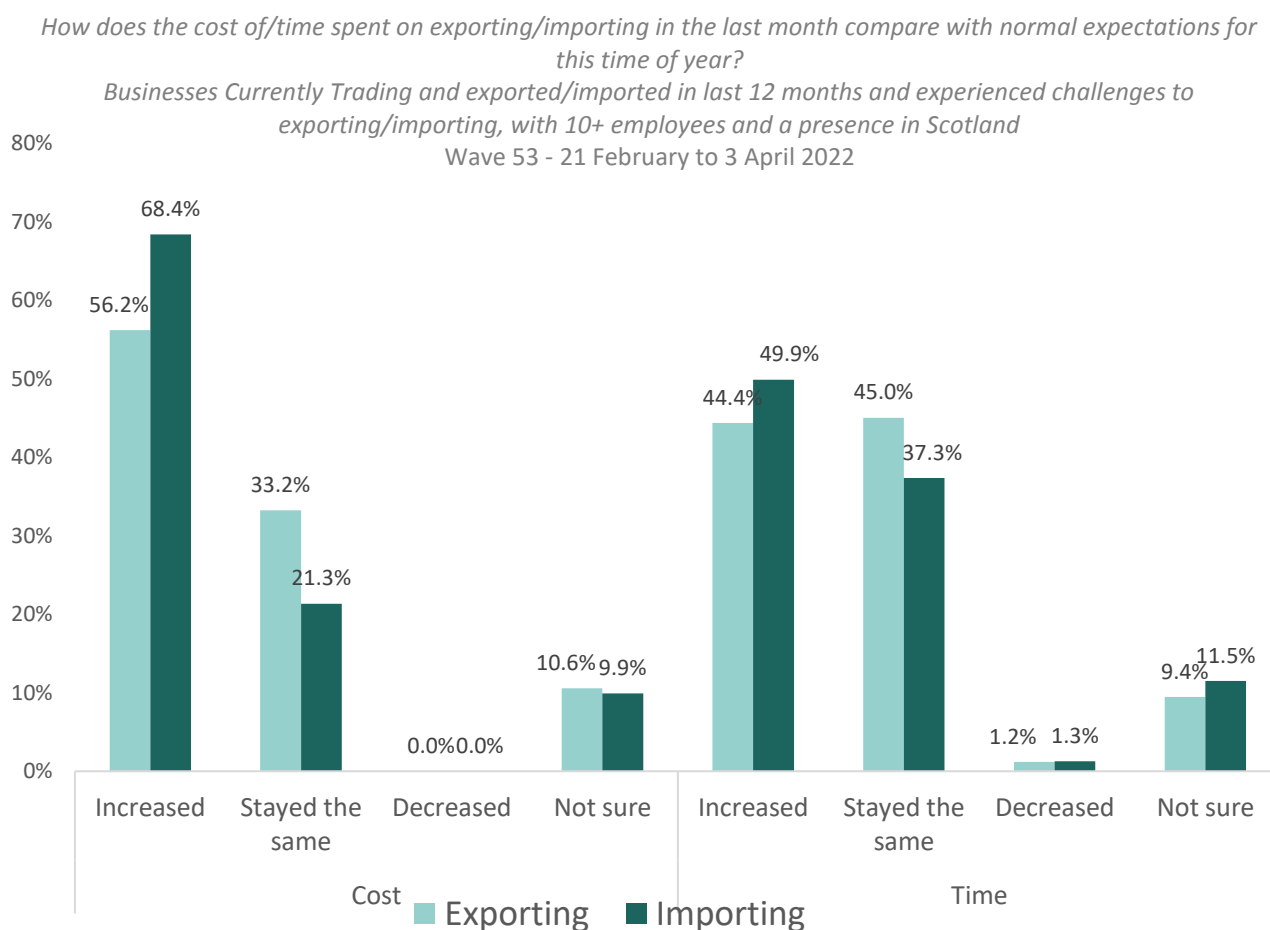
Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 53

Information on exporting was first offered as a support option in the survey in September 2021 (Wave 39), and has been the top reported support option since October 2021 (Wave 41). In the latest wave, customs and tariffs continued to be the second most reported support option.

When asked to choose which support options they would benefit from to help with importing challenges, 32.8% of relevant businesses selected customs and tariffs, 21.9% selected information on importing, and 20.9% selected transport and distribution. Customs and tariffs has been the top reported support option for importing since the series began. Of the relevant businesses, 42.4% reported that none of the available options for importing challenges would benefit them.

Businesses were also asked about the cost of exporting/importing and time spent on exporting/importing compared with normal expectations for this time of year.

Figure 16: In the period 21 February to 3 April 2022 (Wave 53), over two thirds (68.4%) of businesses reported that the cost of importing has increased compared to normal, and this is a higher proportion than for exporting (56.2%).



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 53

Production and Suppliers

In Wave 54, businesses were asked about their experience of global supply chain disruption. Over half (53.9%) of applicable businesses reported that they experienced no disruption to

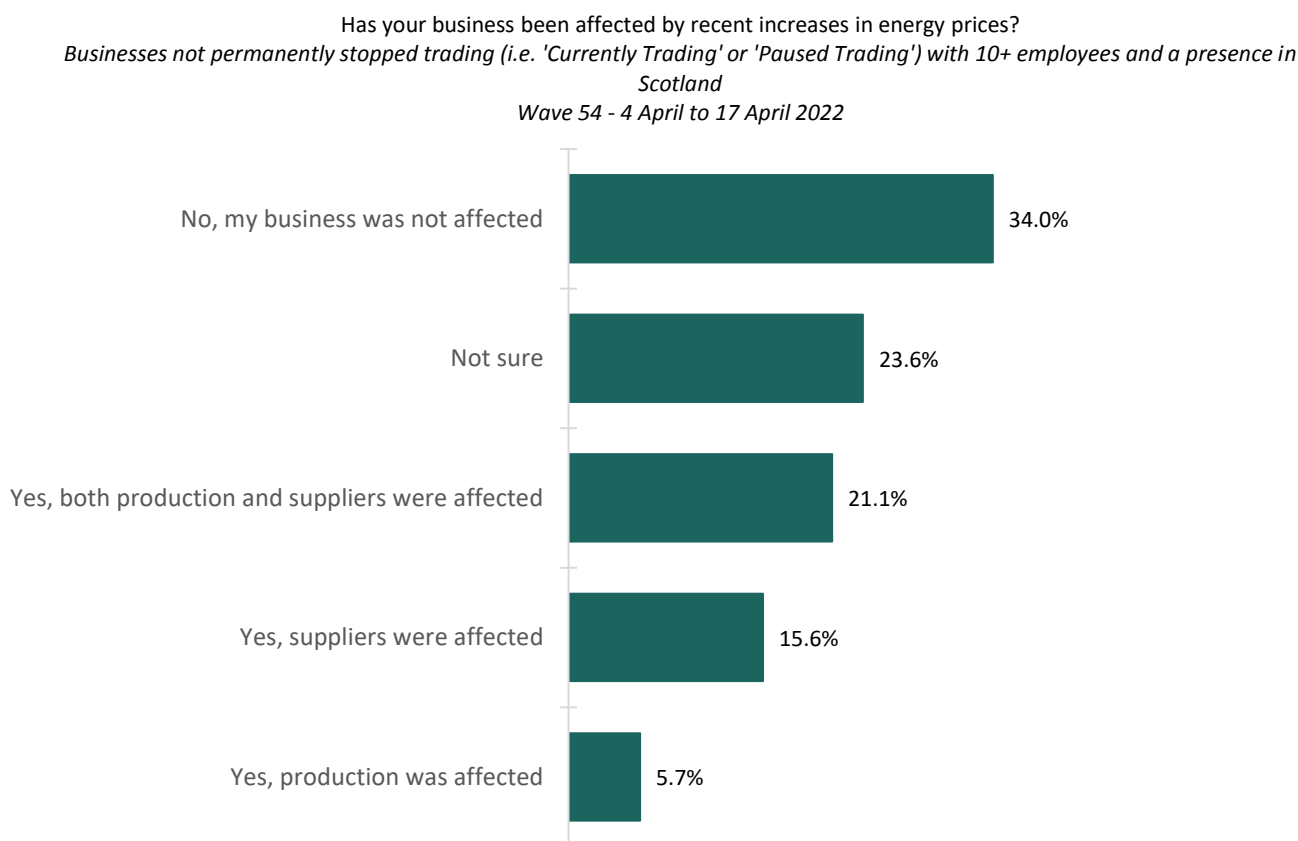
global supply chains in March 2022. An estimated 20.1% of applicable businesses reported that they had experienced disruption. The main concerns for businesses in April 2022 were energy prices (28.3%) and inflation of goods and services prices (25.3%).

Access to goods and materials

In Wave 54, the majority (71.1%) of applicable businesses who had not permanently stopped trading, reported being able to access the materials, goods or services they needed from within the UK in March 2022. A similar proportion (75.1%) reported that they were able to get these from the EU in March 2022. A further fifth of companies (20.3%) reported that they had to change suppliers or find alternative solutions in order to get the materials, goods or services they needed from the EU and only 4.6% reported that they were unable to get them. These values are generally similar to when they were first asked in March 2021 (Wave 27).

Businesses were asked if they had been affected by recent increases in energy prices.

Figure 17: In the period 4 April to 17 April 2022 (Wave 54), an estimated 34.0% of applicable businesses that have not permanently stopped trading, reported that they had not been affected by the recent increases in energy prices.



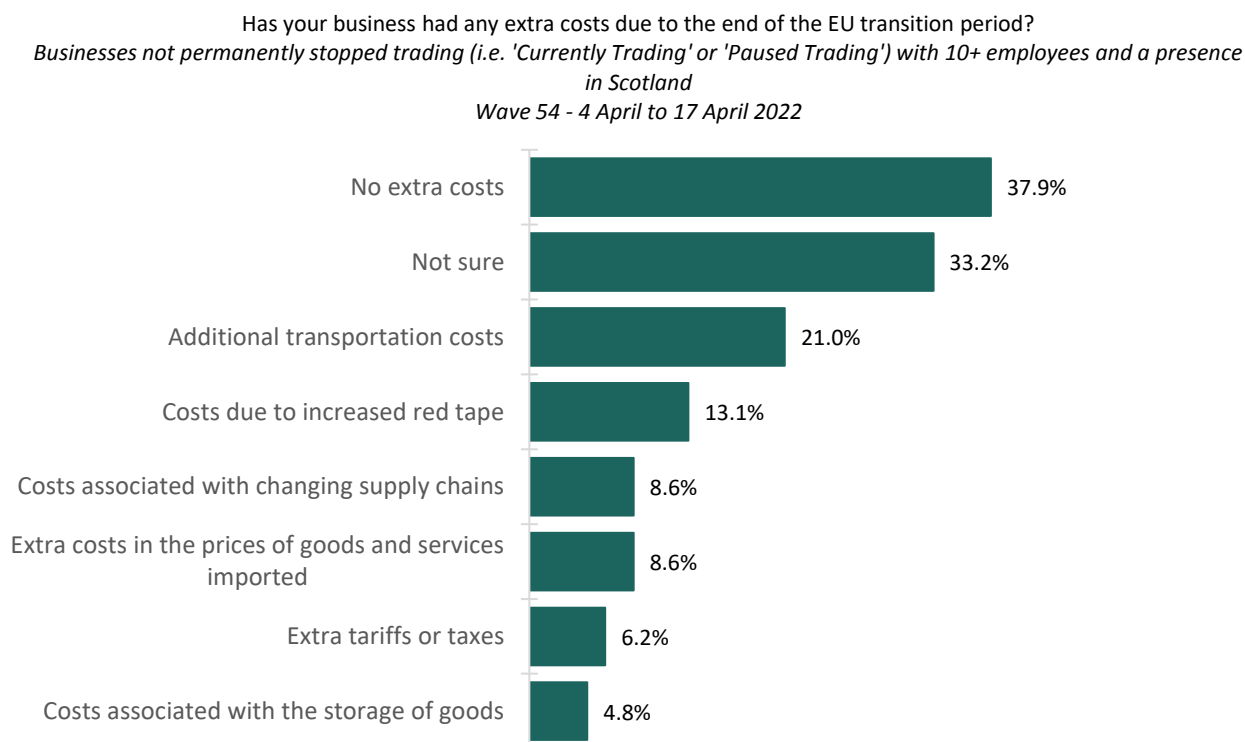
Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 54

In the period 4 April to 17 April 2022 (Wave 54), an estimated 42.4% of applicable businesses that have not permanently stopped trading reported that they had been affected by the recent increase in energy prices in some way.

End of the EU transition period

Businesses not permanently stopped trading were asked if they had any extra costs due to the end of the EU transition period.

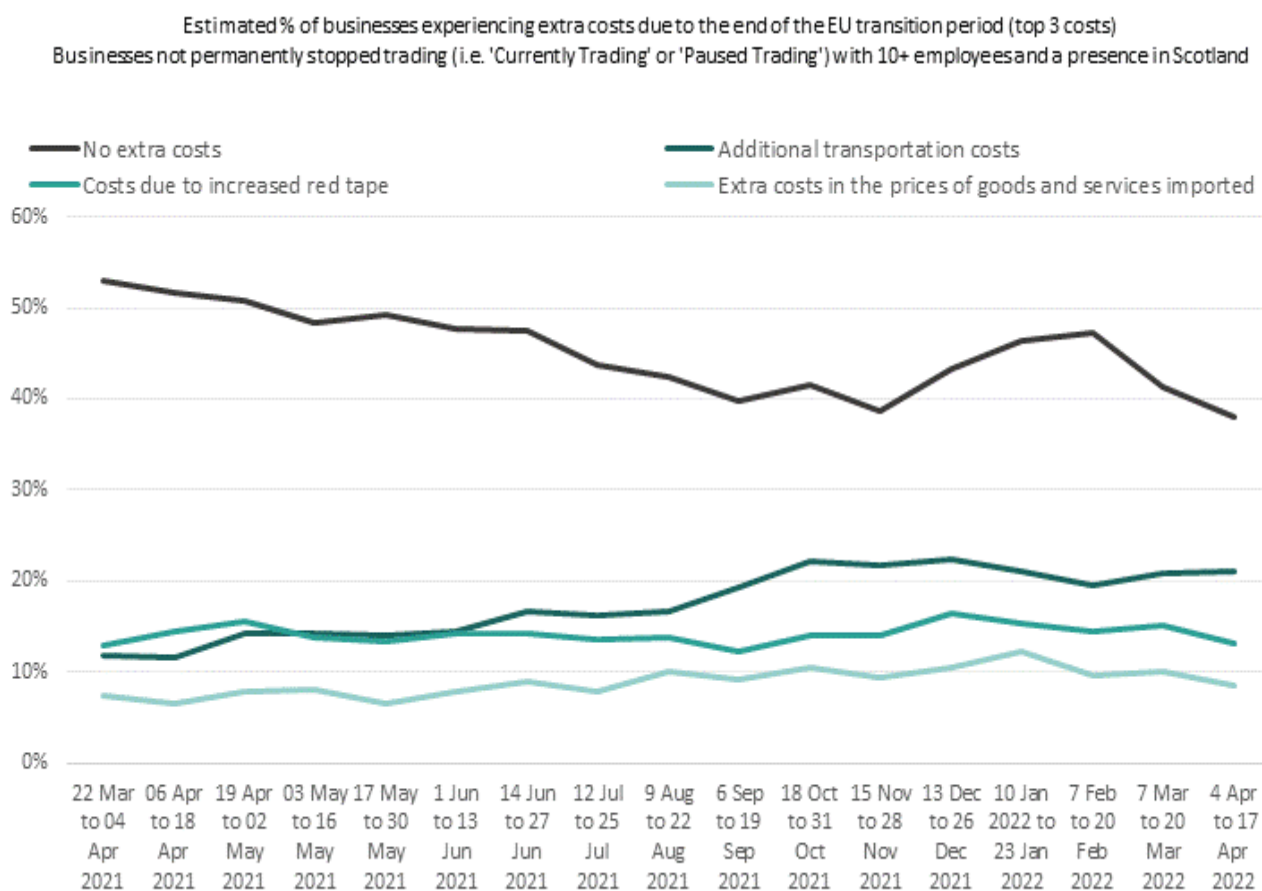
Figure 18: In the period 4 April to 17 April 2022 (Wave 54), an estimated 37.9% of relevant businesses reported incurring no extra costs due to the end of the EU transition period. The most commonly reported additional costs continued to be those associated with transportation (21.0%) and increased red tape (13.1%).



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Wave 54

Additional transportation costs have been the most commonly reported costs since the period 3 May to 16 May 2021 (Wave 30), when they surpassed the second most commonly reported extra costs (due to increased red tape).

Figure 19: The proportion of relevant businesses reporting no extra costs has decreased from 47.3% in the period 7 February to 20 February (Wave 50) to 37.9% in the period 4 April to 17 April (Wave 54).



Source: Office for National Statistics – BICS – Weighted Scotland Estimates – Waves 27-33, 35, 37, 39, 42, 44, 46, 48, 50, 52, 54

Businesses were asked if they intended to open any new branches or subsidiaries in the EU in the next 12 months, and most businesses (88.3%) reported that they did not intend to. This has been the case since this question was first asked in the period 6 April to 18 April 2021 (Wave 28).

Sending goods to and from Northern Ireland

The proportion of businesses that reported sending goods from GB to Northern Ireland in the last 12 months has decreased since this question was first asked, from an estimated 13.3% in January 2021 (Wave 23) to 8.5% in April 2022 (Wave 54). In Wave 54, 9.7% of relevant businesses reported that the volume of goods they would normally send to Northern Ireland had decreased between February 2022 and March 2022, and 66.5% reported that it had stayed the same.

An Experimental Statistics Publication for Scotland

Experimental statistics are a subset of newly developed or innovative statistics undergoing evaluation. They are published to involve users and stakeholders in the assessment of their suitability and quality at an early stage.

The Office for Statistics Regulation publishes guidance on experimental statistics [here](#). The Scottish Government is developing these estimates on an ongoing basis, and is grateful to the ONS which has shared the BICS data.

We welcome any feedback on the development of these statistics, using the contact details below.

Correspondence and enquiries

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