

Stratcom Business Survey: February 2025

COUNTS
Sample: 234 Scottish businesses

Thinking about the last few years, how much of an impact has the rising energy costs had on your business?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
No impact	19	15	2	0	0	2	0	3	0	0	3	3	1	0	2	0	2	3	2
A small impact	62	27	13	11	7	4	1	4	7	3	4	9	1	2	4	0	7	4	16
A significant impact	100	17	20	25	14	24	1	6	10	11	5	23	0	6	4	4	8	7	15
A very significant impact	44	3	6	11	15	9	0	6	4	0	0	12	4	2	3	3	3	2	5
Don't know	9	1	2	0	4	2	0	0	0	0	2	0	0	1	2	0	0	1	2
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Again, thinking about the last few years how concerning would you say the rise in energy costs has been for your business?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
Very concerning	71	14	15	19	15	8	2	6	9	4	1	15	3	5	6	2	3	4	11
Somewhat concerning	107	25	19	22	16	25	0	9	9	8	5	22	1	4	4	4	11	10	20
Not very concerning	41	15	7	6	8	5	0	2	3	2	7	6	1	1	3	3	5	1	7
Not at all concerning	10	7	1	0	0	2	0	1	0	0	1	3	1	0	1	0	1	2	0
Don't know	5	2	1	0	1	1	0	1	0	0	0	1	0	1	0	0	0	0	2
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Thinking about the new Labour UK Government how well do you think they have done in keeping energy prices low?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
They have done very well	13	2	2	4	3	2	0	0	1	1	0	7	1	0	1	1	1	0	0
They have done slightly well	32	4	9	5	10	4	0	2	3	1	2	10	1	0	1	2	7	1	2
They have had no impact	69	26	10	15	9	9	0	6	9	5	4	9	3	4	4	2	3	7	13
They have done slightly poorly	42	8	6	13	9	6	1	1	3	1	2	12	1	2	2	3	6	3	5
They have done very poorly	72	21	16	9	7	19	1	9	5	5	6	9	0	4	6	1	3	6	17
Don't know	6	2	0	1	2	1	0	1	0	1	0	0	0	1	0	0	0	0	3
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Thinking about the Scottish SNP Government how well do you think they have done in keeping energy prices low?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
They have done very well	14	2	4	4	2	2	0	1	2	1	0	5	1	0	2	0	1	0	1
They have done slightly well	39	7	8	9	13	2	1	2	3	2	1	10	2	0	0	5	5	3	5
They have had no impact	73	29	7	13	11	13	0	8	6	3	7	14	1	3	4	2	5	6	14
They have done slightly poorly	32	8	6	11	3	4	0	0	2	1	1	8	2	2	3	1	5	2	5
They have done very poorly	68	15	16	8	9	20	1	8	8	5	5	8	0	5	5	1	4	5	13
Don't know	8	2	2	2	2	0	0	0	0	2	0	2	0	1	0	0	0	1	2
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

On decisions regarding hiring more staff - Thinking about the impact of energy prices on your business over the last few years can you say how much impact the cost of energy has had on the following

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It has had no real impact	75	38	13	12	5	7	0	5	6	5	9	12	1	1	7	3	3	7	16
It has had a small impact	83	13	14	19	18	19	1	5	7	7	3	21	2	5	3	3	6	4	16
It has had a significant impact	42	6	9	9	8	10	0	4	4	2	2	7	2	1	2	1	8	5	4
It has had a very significant impact	28	3	6	7	9	3	1	3	4	0	0	6	1	3	2	2	2	1	3
Don't know	6	3	1	0	0	2	0	2	0	0	0	1	0	1	0	0	1	0	1
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

On decisions regarding reducing staffing levels - Thinking about the impact of energy prices on your business over the last few years can you say how much impact the cost of energy has had on the following

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It has had no real impact	90	44	10	17	10	9	0	6	6	6	10	18	1	5	7	0	3	9	19
It has had a small impact	67	10	14	13	11	19	1	4	6	7	1	12	0	1	3	7	8	5	12
It has had a significant impact	45	5	13	10	10	7	0	4	7	0	2	11	2	3	2	2	6	2	4
It has had a very significant impact	26	3	4	7	9	3	1	3	2	1	1	5	2	2	2	0	2	1	4
Don't know	6	1	2	0	0	3	0	2	0	0	0	1	1	0	0	0	1	0	1
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

On decisions regarding expanding or reducing your footprint - Thinking about the impact of energy prices on your business over the last few years can you say how much impact the cost of energy has had on the following

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It has had no real impact	64	31	9	8	9	7	1	5	5	2	6	11	2	1	7	2	2	7	13
It has had a small impact	67	17	14	16	7	13	1	4	5	6	4	11	1	4	2	2	9	4	14
It has had a significant impact	61	10	11	14	13	13	0	5	6	5	2	16	2	3	4	2	5	2	9
It has had a very significant impact	35	4	8	8	11	4	0	3	4	0	2	8	1	3	1	3	3	4	3
Don't know	7	1	1	1	0	4	0	2	1	1	0	1	0	0	0	0	1	0	1
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

On the prices you charge to your customers - Thinking about the impact of energy prices on your business over the last few years can you say how much impact the cost of energy has had on the following:

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It has had no real impact	50	20	9	7	4	10	0	5	3	3	5	9	1	2	3	0	2	4	13
It has had a small impact	70	18	13	16	11	12	0	4	7	7	3	13	1	4	5	3	8	5	10
It has had a significant impact	68	14	13	14	16	11	2	6	6	4	3	17	2	1	3	5	4	4	11
It has had a very significant impact	41	10	8	9	9	5	0	2	5	0	3	8	2	4	3	1	5	4	4
Don't know	5	1	0	1	0	3	0	2	0	0	0	0	0	0	0	0	1	0	2
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

On capital investment decisions - Thinking about the impact of energy prices on your business over the last few years can you say how much impact the cost of energy has had on the following:

	Total	Staff numbers					Sector													
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)	
It has had no real impact	57	28	9	9	4	7	0	3	4	4	4	7	7	1	2	4	3	4	6	12
It has had a small impact	58	13	10	17	7	11	0	5	7	3	2	11	1	4	0	1	6	5	13	
It has had a significant impact	66	14	13	12	15	12	1	5	5	5	4	18	1	3	2	3	6	3	10	
It has had a very significant impact	42	5	9	8	14	6	1	4	5	1	1	9	3	2	7	1	3	2	3	
Don't know	11	3	2	1	0	5	0	2	0	1	0	2	0	0	1	1	1	1	2	
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40	

Thinking ahead to the next few years, what do you think is likely to happen to energy prices in the UK?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
I think prices will drop significantly	6	0	2	1	2	1	0	0	0	0	0	3	1	0	2	0	0	0	0
I think prices will drop slightly	27	3	7	9	7	1	0	0	3	1	1	13	0	0	1	2	2	3	1
I think prices will stay roughly the same	63	15	13	17	5	13	1	4	5	6	4	7	2	3	2	3	5	7	14
I think prices will rise slightly	73	20	12	11	19	11	1	8	7	4	5	11	0	6	2	2	6	5	16
I think prices will rise significantly	54	21	8	8	6	11	0	5	6	2	4	11	3	2	6	2	6	2	5
Don't know	11	4	1	1	1	4	0	2	0	1	0	2	0	0	1	0	1	0	4
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Plans about expanding staff numbers - Have concerns about high energy prices in the next few years had an impact on any of the following parts of your forward business planning?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
No impact	62	33	10	9	4	6	0	3	7	3	6	6	1	1	6	3	3	8	15
A small impact	67	14	12	16	10	15	0	5	6	8	2	14	2	2	1	1	8	6	12
A significant impact	53	8	9	12	17	7	1	8	6	2	3	15	0	5	3	2	4	0	4
A very significant impact	42	7	10	9	8	8	1	1	2	0	2	10	3	2	3	3	4	3	8
Don't know	10	1	2	1	1	5	0	2	0	1	1	2	0	1	0	1	0	1	1
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Plans about expanding the business - Have concerns about high energy prices in the next few years had an impact on any of the following parts of your forward business planning?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
No impact	53	27	6	5	6	9	0	3	5	2	3	9	1	2	4	1	4	7	12
A small impact	58	15	13	16	4	10	1	5	6	4	5	10	2	2	0	1	6	3	13
A significant impact	63	10	12	14	19	8	0	3	6	6	6	15	1	4	2	5	4	5	6
A very significant impact	48	9	10	10	10	9	1	4	4	1	0	12	2	1	6	2	5	2	8
Don't know	12	2	2	2	1	5	0	4	0	1	0	1	0	2	2	0	1	0	1
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Plans about capital investment - Have concerns about high energy prices in the next few years had an impact on any of the following parts of your forward business planning?

	Total	Staff numbers					Sector													
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)	
No impact	52	25	7	6	4	10	0	3	3	3	2	6	8	1	2	3	1	2	8	13
A small impact	56	11	14	14	9	8	1	6	7	4	0	8	2	4	2	3	6	4	9	
A significant impact	62	12	10	14	14	12	0	3	6	6	6	20	1	3	1	7	2	6		
A very significant impact	48	11	10	9	12	6	1	4	4	0	2	10	2	1	7	3	4	2	8	
Don't know	16	4	2	4	1	5	0	3	1	2	0	1	0	1	1	1	1	1	4	
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40	

Plans about the prices you charge to your customers - Have concerns about high energy prices in the next few years had an impact on any of the following parts of your forward business planning?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
No impact	39	17	5	4	3	10	0	4	1	2	3	5	1	2	1	0	3	5	12
A small impact	67	20	14	14	9	10	1	2	6	5	2	15	2	1	5	2	8	6	12
A significant impact	69	11	13	15	17	13	1	8	10	5	3	14	1	5	4	3	4	4	7
A very significant impact	48	13	10	11	10	4	0	2	3	1	5	12	2	3	3	4	4	2	7
Don't know	11	2	1	3	1	4	0	3	1	1	1	1	0	0	1	0	1	0	2
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Thinking about the new UK Labour government how much confidence do you have in them to reduce energy bills in the next few years?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
Very confident they will be able to reduce energy bills	17	3	2	6	5	1	0	1	0	1	0	9	2	0	2	1	1	0	0
Somewhat confident they will be able to reduce energy bills	36	2	5	13	12	4	0	2	6	1	3	13	0	3	1	2	2	2	1
Neither confident or unconfident that they will be able to reduce energy bills	39	6	11	4	5	13	0	1	3	2	2	7	0	2	1	9	3	8	
Not very confident they will be able to reduce energy bills	64	17	13	15	11	8	1	7	3	5	4	10	4	1	6	3	3	5	12
Not at all confident they will be able to reduce energy bills	75	33	12	8	7	15	1	8	9	5	5	8	0	4	4	2	4	7	18
Don't know	3	2	0	1	0	0	0	0	0	0	0	0	0	1	0	0	1	0	1
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

The UK government has committed, in principle, to having net-zero carbon emissions by 2050. How strongly do you approve or disapprove of this commitment to net-zero?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
Strongly approve	51	14	5	12	13	7	0	7	5	0	2	13	1	3	2	1	2	5	10
Somewhat approve	64	15	11	15	13	10	1	5	5	4	4	16	1	4	3	4	5	4	8
Neither approve nor disapprove	50	12	17	11	6	4	0	3	8	5	2	10	1	0	2	2	5	3	9
Somewhat disapprove	26	5	6	5	4	6	0	1	0	2	3	4	2	2	1	1	4	3	3
Strongly disapprove	40	14	4	4	4	14	1	3	3	2	3	4	1	2	6	1	4	1	9
Don't know	3	3	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	1	1
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Thinking about your support for net zero, which of the following comes closest to your view?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
I support getting to net zero even if it drives up costs	10	4	1	2	3	0	0	0	2	0	0	3	2	1	1	0	0	0	1
I support getting to net zero even if it drives up costs but it's worth it	45	8	8	10	10	9	1	7	4	2	3	9	0	3	1	3	5	2	5
I support getting to net zero even if it keeps energy prices the same	33	13	3	6	9	2	0	4	3	2	3	6	0	1	2	1	1	5	5
I support getting to net zero if it results in slightly higher energy prices	23	4	2	8	4	5	0	1	0	0	10	0	2	1	1	1	2	5	5
I support getting to net zero if it results in slightly lower energy prices	3	0	2	1	0	0	0	0	1	0	1	0	0	0	0	0	0	1	1
Don't know	1	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	1
Total	115	29	16	27	26	17	1	12	10	4	6	29	2	7	5	5	7	9	18

Thinking about your support of net zero, which of the following comes closest to your view?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
I would never support getting to net zero under any circumstances	18	7	2	2	0	7	1	2	0	1	2	2	1	1	2	1	3	0	2
I would support getting to net zero if it results in slightly higher energy prices	26	8	3	3	5	7	0	2	1	0	3	3	1	1	2	1	4	3	5
I would support getting to net zero if it results in slightly lower energy prices	22	4	5	4	3	6	0	0	2	3	1	3	1	2	3	0	1	1	5
Total	66	19	10	9	8	20	1	4	3	4	6	8	3	4	7	2	8	4	12

Would you support the introduction of a regional pricing system into the energy market in the UK?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
I would strongly support that	93	32	14	26	12	9	0	8	9	4	5	25	2	3	7	3	3	8	16
I would slightly support that	57	11	15	10	12	9	0	5	5	7	2	11	2	4	3	2	7	3	6
Neither support nor oppose	40	8	9	9	7	7	1	2	6	1	3	2	1	1	2	3	8	1	9
I would slightly oppose that	18	3	3	1	4	7	1	2	0	0	5	0	2	1	1	1	3	2	2
I would strongly oppose that	15	5	1	0	3	6	0	0	1	0	2	4	1	0	1	0	1	1	4
Don't know	11	4	1	1	2	3	0	2	0	2	2	0	0	1	0	0	0	1	3
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Increase your staffing levels - Thinking about the next few years, please say if significantly cheaper energy bills would allow your business to consider the following

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It would make no real difference	77	39	11	13	5	9	0	4	7	3	8	9	3	3	7	3	6	8	16
It would make a slight difference	67	16	12	14	11	14	0	7	7	9	4	12	1	2	1	0	4	4	16
It would make a significant difference	57	4	14	11	19	9	1	4	6	2	2	18	1	5	3	4	6	2	3
It would make a very significant difference	25	3	5	8	5	4	1	2	1	0	0	7	1	1	2	1	3	2	4
Don't know	8	1	1	1	0	5	0	2	0	0	1	0	0	0	1	1	1	1	1
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

New investment in your business - Thinking about the next few years, please say if significantly cheaper energy bills would allow your business to consider the following: A— Q2: Approx how many staff are employed in your business?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It would make no real difference	51	29	7	5	2	8	0	2	5	2	7	4	2	3	6	0	4	5	11
It would make a slight difference	65	15	12	14	9	15	0	7	8	6	3	12	0	4	1	1	5	4	14
It would make a significant difference	71	13	14	19	16	9	1	5	6	5	2	21	2	3	2	4	6	8	
It would make a very significant difference	37	5	9	7	13	3	1	2	2	1	2	9	2	1	3	3	4	6	
Don't know	10	1	1	2	0	6	0	3	0	0	0	1	0	0	2	1	1	1	
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

New services/products for customers - Thinking about the next few years, please say if significantly cheaper energy bills would allow your business to consider the following

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It would make no real difference	59	32	9	7	2	9	0	3	5	4	6	5	2	3	6	0	6	4	15
It would make a slight difference	78	15	14	18	19	12	0	5	8	6	2	19	1	3	3	5	7	16	
It would make a significant difference	56	8	14	15	9	10	0	5	7	4	2	15	2	5	1	3	4	4	
It would make a very significant difference	33	7	6	6	10	4	2	3	1	0	4	8	1	0	3	2	4	4	
Don't know	8	1	0	1	0	6	0	3	0	0	0	0	0	0	1	1	1	1	
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Better pay for your staff - Thinking about the next few years, please say if significantly cheaper energy bills would allow your business to consider the following

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It would make no real difference	59	30	9	7	5	8	0	5	6	3	5	6	2	2	6	0	5	6	13
It would make a slight difference	70	17	13	13	11	16	0	6	11	6	5	13	2	4	2	4	6	6	13
It would make a significant difference	58	10	15	16	10	7	0	3	11	4	3	16	0	5	0	3	4	8	
It would make a very significant difference	37	5	5	10	12	5	2	3	1	0	1	11	2	0	5	1	4	4	
Don't know	10	1	1	1	2	5	0	2	0	1	0	1	0	0	1	1	1	2	
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Bring down prices for your customers - Thinking about the next few years, please say if significantly cheaper energy bills would allow your business to consider the following:

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It would make no real difference	63	32	6	9	3	13	0	5	5	2	7	5	2	3	5	1	5	5	18
It would make a slight difference	68	12	15	16	13	12	0	5	7	7	3	15	1	3	2	1	5	7	12
It would make a significant difference	66	14	13	13	19	7	1	6	6	5	2	17	1	4	3	5	5	7	
It would make a very significant difference	29	4	8	8	5	4	1	0	3	0	2	9	2	1	3	2	4	2	
Don't know	8	1	1	1	0	5	0	3	0	0	1	0	0	0	1	0	1	1	
Total	234	63	43	47	40	41	2	19	21	14	14	47	6	11	14	9	20	17	40

Stratcom Business Survey: February 2025

PERCENT
Sample: 234 Scottish businesses

Thinking about the last few years, how much of an impact has the rising energy costs had on your business?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
No impact	8%	24%	5%	0%	0%	5%	0%	0%	16%	0%	0%	21%	6%	17%	0%	14%	0%	18%	5%
A small impact	27%	43%	30%	23%	18%	10%	50%	21%	33%	21%	29%	19%	17%	18%	29%	0%	35%	24%	40%
A significant impact	43%	27%	47%	53%	59%	50%	32%	48%	79%	36%	49%	0%	55%	29%	44%	40%	41%	38%	38%
A very significant impact	19%	5%	14%	23%	38%	22%	0%	32%	19%	0%	0%	26%	67%	18%	21%	33%	15%	12%	13%
Don't know	4%	2%	5%	0%	10%	5%	0%	0%	0%	14%	0%	0%	0%	9%	7%	22%	0%	6%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Again, thinking about the last few years how concerning would you say the rise in energy costs has been for your business?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
Very concerning	30%	22%	35%	40%	38%	20%	100%	32%	43%	29%	32%	47%	50%	46%	43%	22%	15%	24%	28%
Somewhat concerning	46%	40%	44%	47%	40%	61%	0%	47%	43%	57%	36%	47%	17%	36%	29%	44%	55%	59%	50%
Not very concerning	18%	24%	16%	13%	20%	12%	0%	11%	14%	14%	50%	13%	17%	9%	21%	33%	25%	6%	18%
Not at all concerning	4%	11%	2%	0%	0%	5%	0%	5%	0%	7%	6%	17%	0%	7%	0%	5%	12%	0%	0%
Don't know	2%	3%	2%	0%	3%	2%	0%	5%	0%	0%	0%	2%	0%	9%	0%	0%	0%	0%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Thinking about the new Labour UK Government how well do you think they have done in keeping energy prices low?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
They have done very well	6%	3%	5%	9%	8%	5%	0%	0%	5%	7%	0%	15%	17%	0%	7%	11%	5%	0%	0%
The have done slightly well	14%	6%	21%	11%	25%	10%	0%	11%	14%	7%	14%	21%	17%	0%	7%	22%	35%	6%	5%
They have had no impact	30%	41%	23%	32%	23%	22%	0%	32%	43%	36%	29%	19%	50%	36%	29%	22%	15%	41%	33%
They have done slightly poorly	18%	13%	14%	28%	23%	15%	50%	5%	14%	7%	14%	26%	17%	18%	14%	33%	30%	18%	13%
They have done very poorly	31%	33%	37%	19%	18%	46%	50%	47%	24%	36%	43%	19%	0%	36%	43%	11%	15%	35%	43%
Don't know	3%	3%	0%	2%	5%	2%	0%	5%	0%	7%	0%	0%	0%	9%	0%	0%	0%	0%	8%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Thinking about the Scottish SNP Government how well do you think they have done in keeping energy prices low?

	Total	Staff numbers					Sector												
		Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
They have done very well	6%	3%	9%	9%	5%	5%	0%	5%	10%	7%	0%	11%	14%	0%	14%	0%	5%	0%	3%
The have done slightly well	17%	11%	19%	19%	33%	5%	50%	11%	14%	14%	7%	21%	33%	0%	0%	56%	25%	18%	13%
They have had no impact	31%	46%	16%	28%	28%	32%	0%	42%	29%	21%	50%	30%	17%	27%	29%	22%	25%	35%	35%
They have done slightly poorly	14%	13%	14%	23%	8%	10%	0%	0%	10%	7%	7%	17%	33%	18%	21%	11%	25%	12%	13%
They have done very poorly	29%	24%	37%	17%	23%	49%	50%	42%	38%	36%	36%	17%	0%	46%	36%	11%	20%	29%	33%
Don't know	3%	3%	5%	4%	5%	0%	0%	0%	0%	14%	0%	4%	0%	9%	0%	0%	0%	6%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

On decisions regarding hiring more staff - Thinking about the impact of energy prices on your business over the last few years can you say how much impact the cost of energy has had on the following

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It has had no real impact	32%	60%	30%	26%	13%	17%	0%	26%	29%	36%	64%	26%	17%	9%	50%	33%	15%	41%	40%
It has had a small impact	36%	21%	33%	40%	45%	46%	50%	26%	33%	50%	21%	45%	33%	46%	21%	33%	30%	24%	40%
It has had a significant impact	18%	10%	21%	19%	20%	24%	0%	21%	19%	14%	14%	15%	33%	9%	14%	11%	40%	29%	10%
It has had a very significant impact	12%	5%	14%	15%	23%	7%	50%	16%	19%	0%	0%	13%	17%	27%	14%	22%	10%	6%	8%
Don't know	3%	5%	2%	0%	0%	5%	0%	11%	0%	0%	0%	2%	0%	9%	0%	0%	5%	0%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

On decisions regarding reducing staffing levels - Thinking about the impact of energy prices on your business over the last few years can you say how much impact the cost of energy has had on the following

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It has had no real impact	39%	70%	23%	36%	25%	22%	0%	32%	29%	43%	71%	38%	17%	46%	50%	0%	15%	53%	48%
It has had a small impact	29%	16%	33%	28%	28%	46%	50%	21%	29%	50%	7%	26%	0%	9%	21%	78%	40%	29%	30%
It has had a significant impact	19%	8%	30%	21%	25%	17%	0%	21%	33%	0%	14%	23%	33%	27%	14%	22%	30%	12%	10%
It has had a very significant impact	11%	5%	9%	15%	23%	7%	50%	16%	10%	7%	7%	11%	33%	18%	14%	0%	10%	6%	10%
Don't know	3%	5%	2%	0%	0%	7%	0%	11%	0%	0%	0%	2%	17%	0%	0%	0%	5%	0%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

On decisions regarding expanding or reducing your footprint - Thinking about the impact of energy prices on your business over the last few years can you say how much impact the cost of energy has had on the following

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It has had no real impact	27%	49%	21%	17%	23%	17%	50%	26%	24%	14%	43%	23%	33%	9%	50%	22%	10%	41%	33%
It has had a small impact	23%	27%	33%	34%	18%	32%	50%	21%	24%	43%	29%	23%	17%	36%	14%	22%	45%	24%	35%
It has had a significant impact	26%	16%	26%	30%	33%	32%	0%	26%	29%	36%	14%	34%	33%	27%	29%	22%	25%	12%	23%
It has had a very significant impact	15%	6%	19%	17%	28%	10%	0%	16%	19%	0%	14%	17%	17%	27%	7%	33%	15%	24%	8%
Don't know	3%	2%	2%	2%	0%	10%	0%	11%	5%	7%	0%	2%	0%	0%	0%	0%	5%	0%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

On the prices you charge to your customers - Thinking about the impact of energy prices on your business over the last few years can you say how much impact the cost of energy has had on the following:

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It has had no real impact	21%	32%	21%	15%	10%	24%	0%	26%	14%	21%	36%	19%	17%	18%	21%	0%	10%	24%	33%
It has had a small impact	30%	29%	30%	34%	28%	29%	0%	21%	33%	50%	21%	28%	17%	36%	36%	33%	40%	29%	25%
It has had a significant impact	29%	22%	30%	30%	40%	27%	100%	32%	29%	29%	21%	36%	33%	9%	21%	56%	20%	24%	28%
It has had a very significant impact	18%	16%	19%	19%	23%	12%	0%	11%	24%	0%	21%	17%	33%	36%	21%	11%	25%	24%	10%
Don't know	2%	2%	0%	2%	0%	7%	0%	11%	0%	0%	0%	0%	0%	0%	0%	0%	5%	0%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

On capital investment decisions - Thinking about the impact of energy prices on your business over the last few years can you say how much impact the cost of energy has had on the following:

	Staff numbers					Sector													
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It has had no real impact	24%	44%	17%	19%	10%	17%	0%	16%	19%	29%	50%	15%	17%	18%	29%	33%	20%	35%	30%
It has had a small impact	26%	21%	23%	36%	18%	27%	0%	26%	33%	21%	14%	23%	17%	36%	0%	11%	30%	29%	33%
It has had a significant impact	28%	22%	30%	26%	38%	29%	50%	26%	24%	36%	29%	38%	17%	27%	14%	33%	30%	18%	25%
It has had a very significant impact	18%	8%	21%	17%	35%	15%	50%	21%	24%	7%	7%	19%	50%	18%	50%	11%	15%	12%	8%
Don't know	5%	5%	5%	2%	0%	12%	0%	11%	0%	7%	0%	4%	0%	0%	7%	11%	5%	6%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Thinking ahead to the next few years, what do you think is likely to happen to energy prices in the UK?

	Staff numbers					Sector													
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
I think prices will drop significantly	3%	0%	5%	2%	5%	2%	0%	0%	0%	0%	0%	6%	17%	0%	14%	0%	0%	0%	0%
I think prices will drop slightly	12%	5%	16%	19%	18%	2%	0%	0%	14%	7%	7%	28%	0%	0%	7%	22%	10%	18%	3%
I think prices will stay roughly the same	27%	24%	30%	36%	13%	32%	50%	21%	24%	43%	29%	15%	33%	27%	14%	33%	25%	41%	35%
I think prices will rise slightly	31%	32%	28%	23%	48%	27%	50%	42%	33%	29%	36%	23%	0%	55%	14%	22%	30%	29%	40%
I think prices will rise significantly	23%	33%	19%	17%	15%	27%	0%	26%	29%	14%	29%	23%	50%	18%	43%	22%	30%	12%	13%
Don't know	5%	6%	2%	2%	3%	10%	0%	11%	0%	7%	0%	4%	0%	0%	7%	0%	5%	0%	10%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Plans about expanding staff numbers - Have concerns about high energy prices in the next few years had an impact on any of the following parts of your forward business planning?

	Staff numbers					Sector													
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
No impact	27%	52%	23%	19%	10%	15%	0%	16%	33%	21%	43%	13%	17%	9%	43%	33%	15%	47%	38%
A small impact	29%	22%	28%	34%	25%	37%	0%	26%	29%	57%	14%	30%	33%	18%	7%	11%	40%	35%	30%
A significant impact	23%	13%	21%	26%	43%	17%	50%	42%	29%	14%	21%	32%	0%	46%	21%	22%	20%	0%	10%
A very significant impact	18%	11%	23%	19%	20%	20%	50%	5%	10%	0%	14%	21%	50%	18%	21%	33%	20%	18%	20%
Don't know	4%	2%	5%	2%	3%	12%	0%	11%	0%	7%	7%	4%	0%	9%	7%	0%	5%	0%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Plans about expanding the business - Have concerns about high energy prices in the next few years had an impact on any of the following parts of your forward business planning?

	Staff numbers					Sector													
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
No impact	23%	43%	14%	11%	15%	22%	0%	16%	24%	14%	21%	19%	17%	18%	29%	11%	20%	41%	30%
A small impact	26%	24%	30%	34%	10%	24%	50%	26%	29%	29%	36%	21%	33%	18%	0%	11%	30%	18%	33%
A significant impact	27%	16%	28%	30%	48%	20%	0%	16%	29%	43%	43%	32%	17%	36%	14%	56%	20%	29%	15%
A very significant impact	21%	14%	23%	21%	25%	22%	50%	21%	19%	7%	0%	26%	33%	9%	43%	22%	25%	12%	20%
Don't know	5%	3%	5%	4%	3%	12%	0%	21%	0%	7%	0%	2%	0%	18%	14%	0%	5%	0%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Plans about capital investment - Have concerns about high energy prices in the next few years had an impact on any of the following parts of your forward business planning?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
No impact	22%	40%	16%	13%	10%	24%	0%	16%	14%	14%	43%	17%	17%	18%	21%	11%	10%	47%	33%
A small impact	24%	18%	33%	30%	23%	20%	50%	32%	33%	29%	0%	17%	33%	36%	14%	33%	30%	24%	23%
A significant impact	27%	19%	23%	30%	35%	29%	0%	16%	29%	43%	43%	29%	17%	27%	7%	11%	35%	12%	15%
A very significant impact	21%	18%	23%	19%	30%	15%	50%	21%	19%	0%	14%	21%	33%	9%	50%	33%	20%	12%	20%
Don't know	7%	6%	5%	9%	3%	12%	0%	16%	5%	14%	0%	2%	0%	9%	7%	11%	5%	6%	10%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Plans about the prices you charge to your customers - Have concerns about high energy prices in the next few years had an impact on any of the following parts of your forward business planning?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
No impact	17%	27%	12%	9%	8%	24%	0%	21%	5%	14%	21%	11%	17%	18%	7%	0%	15%	29%	30%
A small impact	29%	32%	33%	30%	23%	24%	50%	11%	29%	36%	14%	32%	33%	9%	36%	22%	40%	35%	30%
A significant impact	30%	18%	30%	32%	43%	32%	50%	42%	48%	36%	21%	30%	17%	46%	29%	33%	20%	24%	18%
A very significant impact	21%	21%	23%	23%	25%	10%	0%	11%	14%	7%	36%	26%	33%	27%	21%	44%	20%	12%	18%
Don't know	5%	3%	2%	6%	3%	10%	0%	16%	5%	7%	7%	2%	0%	0%	7%	0%	5%	0%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Thinking about the new UK Labour government how much confidence do you have in them to reduce energy bills in the next few years?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
Very confident they will be able to reduce energy bills	7%	5%	5%	13%	13%	2%	0%	5%	0%	7%	0%	19%	33%	0%	14%	11%	5%	0%	0%
Somewhat confident they will be able to reduce energy bills	15%	3%	12%	28%	30%	10%	0%	11%	29%	7%	21%	28%	0%	27%	7%	22%	10%	12%	3%
Neither confident or unconfident that they will be able to reduce energy bills	17%	10%	26%	9%	13%	32%	0%	5%	14%	14%	14%	15%	0%	18%	7%	11%	45%	18%	20%
Not very confident they will be able to reduce energy bills	27%	27%	30%	32%	28%	20%	50%	37%	14%	36%	29%	21%	67%	9%	43%	33%	15%	29%	30%
Not at all confident they will be able to reduce energy bills	32%	52%	28%	17%	18%	37%	50%	42%	43%	36%	36%	17%	0%	36%	29%	22%	20%	41%	45%
Don't know	1%	3%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	9%	0%	0%	5%	0%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

The UK government has committed, in principle, to having net-zero carbon emissions by 2050. How strongly do you approve or disapprove of this commitment to net-zero?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
Strongly approve	22%	22%	12%	26%	33%	17%	0%	37%	24%	0%	14%	28%	17%	27%	14%	11%	10%	29%	25%
Somewhat approve	27%	24%	26%	32%	33%	24%	50%	26%	24%	29%	29%	34%	17%	36%	21%	44%	25%	24%	20%
Neither approve nor disapprove	21%	19%	40%	23%	15%	10%	0%	16%	38%	14%	21%	17%	0%	0%	14%	22%	25%	18%	23%
Somewhat disapprove	11%	8%	14%	11%	10%	15%	0%	5%	0%	14%	21%	9%	33%	18%	7%	11%	20%	18%	8%
Strongly disapprove	17%	22%	9%	9%	10%	34%	50%	16%	14%	14%	21%	9%	17%	18%	43%	11%	20%	6%	23%
Don't know	1%	5%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	0%	0%	0%	0%	6%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Thinking about your support for net zero, which of the following comes closest to your view?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
I support getting to net zero even if it drives up energy prices significantly higher than today	9%	14%	6%	7%	12%	0%	0%	0%	20%	0%	0%	10%	100%	14%	20%	0%	0%	0%	6%
I support getting to net zero even if it drives up energy prices slightly higher than today	39%	28%	50%	37%	39%	53%	100%	58%	40%	50%	50%	31%	0%	43%	20%	60%	71%	22%	28%
I support getting to net zero even if it keeps energy prices at a similar level as today	29%	45%	19%	22%	35%	12%	0%	33%	30%	50%	50%	21%	0%	14%	40%	20%	14%	56%	28%
I support getting to net zero if it results in slightly cheaper prices than today	20%	14%	13%	30%	15%	29%	0%	8%	0%	0%	35%	0%	29%	20%	20%	14%	22%	28%	
I support getting to net zero if it results in significantly cheaper prices than today	3%	0%	13%	4%	0%	0%	0%	0%	10%	0%	0%	3%	0%	0%	0%	0%	0%	0%	6%
Don't know	1%	0%	0%	0%	6%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Thinking about your views of net zero, which of the following comes closest to your view?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
I would never support getting to net zero under any circumstances.	27%	37%	20%	22%	0%	35%	100%	50%	0%	25%	33%	25%	33%	25%	29%	50%	38%	0%	17%
I would support getting to net zero if it resulted in slightly lower energy bills	39%	42%	30%	33%	63%	35%	0%	50%	33%	0%	50%	38%	33%	25%	29%	50%	50%	75%	42%
I would support getting to net zero if it resulted in significantly lower energy bills	33%	21%	50%	44%	38%	30%	0%	0%	67%	75%	17%	38%	33%	50%	43%	0%	13%	25%	42%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Would you support the introduction of a regional pricing system into the energy market in the UK?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
I would strongly support that	40%	51%	33%	55%	30%	22%	0%	42%	43%	29%	36%	53%	33%	27%	50%	33%	15%	47%	40%
I would slightly support that	24%	18%	35%	21%	30%	22%	0%	26%	24%	50%	14%	23%	33%	36%	21%	22%	35%	18%	15%
Neither support nor oppose	17%	13%	21%	19%	18%	17%	50%	11%	29%	7%	21%	4%	17%	9%	14%	33%	40%	6%	23%
I would slightly oppose that	8%	5%	7%	2%	10%	17%	50%	11%	0%	0%	0%	11%	0%	18%	7%	11%	5%	18%	5%
I would strongly oppose that	8%	8%	2%	0%	8%	15%	0%	0%	5%	0%	14%	9%	17%	0%	7%	0%	5%	6%	10%
Don't know	5%	6%	2%	2%	5%	7%	0%	11%	0%	14%	14%	0%	0%	9%	0%	0%	0%	6%	8%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Increase your staffing levels - Thinking about the next few years, please say if significantly cheaper energy bills would allow your business to consider the following

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It would make no real difference	33%	62%	26%	28%	13%	22%	0%	21%	33%	21%	57%	19%	50%	27%	50%	33%	30%	47%	40%
It would make a slight difference	29%	25%	28%	30%	28%	34%	0%	37%	33%	64%	29%	26%	17%	18%	7%	0%	20%	24%	40%
It would make a significant difference	24%	6%	33%	23%	48%	22%	50%	21%	29%	14%	14%	38%	17%	46%	21%	44%	30%	12%	8%
It would make a very significant difference	11%	5%	12%	17%	13%	10%	50%	11%	5%	0%	0%	15%	17%	9%	14%	11%	15%	12%	10%
Don't know	3%	2%	2%	2%	0%	12%	0%	11%	0%	0%	0%	2%	0%	0%	7%	11%	5%	6%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

New investment in your business - Thinking about the next few years, please say if significantly cheaper energy bills would allow your business to consider the following: A— Q2: Approx how many staff are employed in your business?

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It would make no real difference	22%	46%	11%	5%	20%	0%	0%	11%	24%	14%	50%	9%	33%	27%	43%	0%	20%	29%	28%
It would make a slight difference	28%	24%	28%	30%	23%	37%	0%	37%	38%	43%	21%	26%	0%	36%	7%	11%	25%	24%	35%
It would make a significant difference	30%	21%	33%	40%	40%	22%	50%	26%	29%	36%	14%	45%	33%	27%	14%	44%	30%	35%	20%
It would make a very significant difference	16%	8%	21%	15%	33%	7%	50%	11%	10%	7%	14%	19%	33%	9%	21%	33%	20%	6%	15%
Don't know	4%	2%	2%	4%	0%	15%	0%	16%	0%	0%	0%	2%	0%	0%	14%	11%	5%	6%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

New services/products for customers - Thinking about the next few years, please say if significantly cheaper energy bills would allow your business to consider the following

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It would make no real difference	25%	51%	21%	15%	5%	22%	0%	16%	24%	29%	43%	11%	33%	27%	43%	0%	30%	24%	38%
It would make a slight difference	33%	24%	33%	38%	48%	29%	0%	26%	38%	43%	14%	40%	17%	27%	21%	33%	25%	41%	40%
It would make a significant difference	24%	13%	33%	32%	23%	24%	0%	26%	33%	29%	14%	32%	7%	46%	7%	33%	20%	24%	10%
It would make a very significant difference	14%	11%	14%	13%	25%	10%	100%	16%	5%	0%	29%	17%	17%	0%	21%	22%	20%	6%	10%
Don't know	3%	2%	0%	2%	0%	15%	0%	16%	0%	0%	0%	0%	0%	0%	7%	11%	5%	6%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Better pay for your staff - Thinking about the next few years, please say if significantly cheaper energy bills would allow your business to consider the following

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It would make no real difference	25%	48%	21%	15%	13%	20%	0%	26%	29%	21%	36%	13%	33%	18%	43%	0%	25%	35%	33%
It would make a slight difference	30%	27%	30%	28%	28%	39%	0%	32%	14%	43%	36%	28%	33%	36%	14%	44%	30%	35%	33%
It would make a significant difference	25%	16%	35%	34%	25%	17%	0%	16%	52%	29%	21%	34%	0%	46%	0%	33%	20%	6%	20%
It would make a very significant difference	16%	8%	12%	21%	30%	12%	100%	16%	5%	0%	7%	23%	33%	0%	36%	11%	20%	18%	10%
Don't know	4%	2%	2%	2%	5%	12%	0%	11%	0%	7%	0%	2%	0%	0%	7%	11%	5%	6%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Bring down prices for your customers - Thinking about the next few years, please say if significantly cheaper energy bills would allow your business to consider the following:

	Staff numbers						Sector												
	Total	Less than 10	Between 10 and 49	Between 50 and 249	Between 250 and 1,000	More than 1000	Agriculture	Education	Construction	Manufacturing / Industry	Services	IT/Tech	Real estate	Hospitality /leisure	Transportation / deliveries	Security	Financial services	Retail	Other (please specify)
It would make no real difference	27%	51%	14%	19%	8%	32%	0%	26%	24%	14%	50%	11%	33%	27%	36%	11%	25%	29%	45%
It would make a slight difference	19%	35%	34%	34%	29%	29%	0%	26%	33%	50%	21%	32%	17%	27%	14%	11%	25%	41%	30%
It would make a significant difference	28%	22%	30%	28%	48%	17%	50%	32%	29%	36%	14%	36%	17%	36%	21%	56%	25%	24%	18%
It would make a very significant difference	12%	6%	19%	17%	13%	10%	50%	0%	14%	0%	14%	19%	33%	9%	21%	22%	20%	0%	5%
Don't know	3%	2%	2%	2%	0%	12%	0%	16%	0%	0%	0%	2%	0%	0%	7%	0%	5%	6%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%