



North West Energy Task Force – Lancashire business survey

METHODOLOGY NOTE

ComRes interviewed 500 Lancashire business decision-makers by telephone between 18th January and 4th February 2016. Data were weighted to be representative of all Lancashire businesses by company size. ComRes is a member of the British Polling Council and abides by its rules.

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Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

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Base: All giving a ranking

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Base: All giving a ranking

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Base: All respondents

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least. Bottom 2 summary 21

Base: All respondents

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least. Supporting local businesses 22

Base: All giving a ranking

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least. Improving community facilities such as parks and leisure 23

Base: All giving a ranking

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least. Preserving the local environment 24

Base: All giving a ranking

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least. Improving local sustainability such as with flood defences 25

Base: All giving a ranking

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least. Providing opportunities for young people (e.g. more facilities for schools, nurseries and colleges) 26

Base: All giving a ranking

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Base: All respondents

Q6. Thinking now more generally about energy and the role of natural gas from shale, do you agree or disagree with each of the following statements? The UK's energy supply is secure enough to keep the lights on and provide reliable power for my business over winters in the next five years 28

Base: All respondents

Q6. Thinking now more generally about energy and the role of natural gas from shale, do you agree or disagree with each of the following statements? The UK should prioritise domestic production of natural gas from shale over importing natural gas from overseas 29

Base: All respondents

Q6. Thinking now more generally about energy and the role of natural gas from shale, do you agree or disagree with each of the following statements? Replacing coal-fired power stations with natural gas power stations in the medium term (for example in the next 10-20 years) is the most efficient way for the UK to reduce greenhouse gas emissions 30

Base: All respondents

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Base: All respondents

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Base: All respondents

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Base: All respondents

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Base: All respondents	
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Base: All respondents	
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Base: All respondents	
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Base: All respondents	
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Base: All respondents	

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

SQ1. Can I check what responsibilities you hold in your organisation?

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
Significance Level: 95%		a	b	c	d	e	f	g
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Control of or having a say in budgeting or financial decisions	470	419	43	8	51	247	72	106
	94%	95%	86%	84%	86%	93%	95%	95%
		bcd						
Control of or having a say in strategic decisions	458	406	45	7	52	248	73	100
	92%	92%	89%	73%	86%	93%	96%	89%
		cd	c		c			
Recruitment (hiring new staff on a permanent or temporary basis)	436	386	44	7	50	236	66	97
	87%	88%	87%	69%	84%	89%	87%	86%
		c	c		c			
Directly managing one or more employees	403	351	45	8	52	216	66	84
	81%	80%	89%	76%	87%	81%	87%	75%
			ac					
Procurement / supply chain management	402	359	36	7	43	218	63	86
	80%	82%	72%	69%	71%	82%	84%	77%
		bcd						
None of the above	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

SQ2. Which of the following regions is your organisation based in?

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
London	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
South East	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
South West	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
East Midlands	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
West Midlands	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
East of England	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
North West	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
North East	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
Yorkshire and Humberside	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
Wales	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
Northern Ireland	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
Scotland	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

SQ3. Which of the following counties is your organisation based in?

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Cheshire	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
Cumbria	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
Greater Manchester	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-
Lancashire	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Merseyside	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

D1. How many people does your organisation employ?

Base: All respondents

	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY			
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
0-9	440	440	-	-	-	226	69	103
	88%	100%	-	-	-	85%	92%	92%
		bcd						
10-49	50	-	50	-	50	34	5	8
	10%	-	100%	-	83%	13%	7%	7%
			acd		ac			
50-249	5	-	-	5	5	4	1	1
	1%	-	-	55%	9%	1%	1%	1%
				abd	ab			
250+	5	-	-	5	5	3	*	1
	1%	-	-	45%	8%	1%	1%	1%
				abd	ab			

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

D2. What industry sector do you work in?

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Agriculture, forestry & fishing	17 3%	16 4%	1 1%	* 2%	1 1%	11 4%	4 5%	3 2%
Production	48 10%	42 9%	6 11%	1 12%	7 11%	31 12%	8 10%	8 7%
Construction	92 18%	84 19%	7 14%	1 8%	8 13%	53 20%	17 23%	11 10%
Motor trades	37 7%	35 8%	2 3%	* 2%	2 3%	25 9%	6 8%	5 5%
Wholesale	10 2%	9 2%	1 1%	* 2%	1 1%	8 3%	1 1%	1 1%
Retail	55 11%	52 12%	3 5%	1 8%	3 5%	29 11%	12 15%	9 8%
Transport & storage (inc. postal)	13 3%	11 3%	2 3%	* 2%	2 3%	7 3%	- -	4 4%
Accommodation & food services	32 6%	26 6%	5 9%	1 8%	5 9%	17 7%	8 11%	3 3%
Information & communication	29 6%	26 6%	3 6%	- -	3 5%	13 5%	4 6%	9 8%
Finance & insurance	7 1%	6 1%	1 1%	* 2%	1 1%	4 2%	1 2%	1 1%
Property	18 4%	18 4%	- -	- -	- -	6 2%	1 2%	6 6%
Columns Tested: a,b,c,d - e,f,g		bd						

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

D2. What industry sector do you work in?

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Professional, scientific & technical	17 3%	15 3%	2 3%	* 4%	2 3%	8 3%	1 2%	7 6%
Business administration and support services	18 4%	16 4%	1 2%	* 4%	1 2%	12 4%	- -	5 4%
Public administration and defence	4 1%	4 1%	1 1%	* 2%	1 1%	1 *	- -	4 3% e
Education	14 3%	9 2%	4 8%	1 12%	5 9%	3 1%	3 4%	3 3%
Health	27 5%	18 4%	8 15%	2 18%	9 15%	11 4%	3 4%	11 10% e
Arts, entertainment, recreation and other services	54 11%	47 11%	6 12%	1 12%	7 12%	22 8%	7 9%	20 18% e
Other	8 2%	5 1%	3 5%	* 4%	3 5%	5 2%	- -	2 2%

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q1. You may already be aware that natural gas from shale (sometimes known as shale gas) is a potential source of energy that is present underground. It is extracted by a process called hydraulic fracturing or fracking. What impact, if any, do you think that the development of a shale gas industry in Lancashire would have on the Lancashire economy?

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Very positive	(5) 21%	88 20%	16 32%	2 20%	18 30%	106 40%	- -	- -
			a		a	fg		
Fairly positive	(4) 32%	137 31%	18 36%	4 41%	22 37%	160 60%	- -	- -
						fg		
No impact	(3) 15%	69 16%	5 10%	1 12%	6 10%	- -	76 100%	- -
							eg	
Fairly negative	(2) 8%	38 9%	3 6%	1 6%	4 6%	- -	- -	41 37%
								ef
Very negative	(1) 14%	66 15%	5 9%	1 6%	5 8%	- -	- -	71 63%
								ef
Don't know	47 9%	42 9%	4 7%	2 16%	5 8%	- -	- -	- -
NETS								
Net: Positive	266 53%	226 51%	34 68%	6 61%	40 67%	266 100%	- -	- -
			a		a	fg		
Net: Negative	112 22%	103 23%	8 15%	1 12%	9 14%	- -	- -	112 100%
			d					ef
Mean score	3.42	3.36	3.82	3.74	3.81	4.40	3.00	1.37
			a		a	g		
Standard deviation	1.35	1.36	1.26	1.17	1.23	.49	-	.48
Standard error	.06	.08	.13	.18	.11	.03	-	.05

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q2_SUM. There are a number of ways that developing the shale gas industry in Lancashire could potentially impact on the local economy. What impact, if any, do you think that the development of a shale gas industry in Lancashire would have on...

SUMMARY TABLE

Base: All respondents

	Total	Very positive	Fairly positive	No impact	Fairly negative	Very negative	Don't know	Net: Positive	Net: Negative	Mean
The number of skilled jobs available in Lancashire	500 100%	110 22%	218 44%	92 18%	20 4%	26 5%	34 7%	328 66%	46 9%	3.79
Available business opportunities in Lancashire	500 100%	89 18%	193 39%	123 25%	27 5%	36 7%	32 6%	282 56%	63 13%	3.58
The size of the local economy in Lancashire	500 100%	89 18%	183 37%	113 23%	45 9%	45 9%	25 5%	272 54%	90 18%	3.48

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q2_1. There are a number of ways that developing the shale gas industry in Lancashire could potentially impact on the local economy. What impact, if any, do you think that the development of a shale gas industry in Lancashire would have on...

The number of skilled jobs available in Lancashire

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Very positive	(5) 22%	91 21%	17 33%	3 29%	19 32%	93 35%	7 9%	* *
			a		a	fg	g	
Fairly positive	(4) 44%	192 44%	22 43%	5 47%	26 44%	138 52%	32 42%	32 29%
						g		
No impact	(3) 18%	83 19%	7 14%	1 14%	8 14%	21 8%	28 37%	33 30%
						e	e	e
Fairly negative	(2) 4%	18 4%	2 4%	* 4%	2 4%	3 1%	3 4%	13 11%
						e	e	e
Very negative	(1) 5%	24 5%	2 4%	* 2%	2 4%	1 *	1 2%	24 21%
						ef	ef	ef
Don't know	34 7%	33 7%	1 2%	* 4%	1 2%	10 4%	5 7%	10 9%
		bd				e	e	e
NETS								
Net: Positive	328 66%	282 64%	38 76%	8 76%	46 76%	231 87%	39 51%	32 29%
			a		a	fg	g	
Net: Negative	46 9%	42 9%	4 8%	1 6%	5 8%	4 2%	4 6%	36 32%
						e	e	ef
Mean score	3.79	3.76	3.99	4.02	3.99	4.25	3.57	2.73
			a		a	fg	g	
Standard deviation	1.03	1.04	1.02	.94	1.00	.69	.80	1.15
Standard error	.05	.06	.10	.13	.08	.04	.10	.12

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q2_2. There are a number of ways that developing the shale gas industry in Lancashire could potentially impact on the local economy. What impact, if any, do you think that the development of a shale gas industry in Lancashire would have on...

Available business opportunities in Lancashire

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Very positive (5)	89 18%	73 17%	14 27%	2 20%	15 26%	74 28%	7 10%	2 2%
			a		a	fg	g	
Fairly positive (4)	193 39%	168 38%	21 42%	5 45%	26 43%	142 54%	21 28%	17 15%
					fg	g		
No impact (3)	123 25%	111 25%	10 20%	2 22%	12 20%	36 14%	35 46%	36 32%
						e	e	e
Fairly negative (2)	27 5%	24 5%	2 4%	1 6%	3 4%	1 *	3 3%	22 19%
						e	e	ef
Very negative (1)	36 7%	34 8%	2 4%	* 2%	2 4%	- -	4 5%	32 29%
						e	e	ef
Don't know	32 6%	30 7%	2 3%	1 6%	2 3%	12 4%	6 8%	4 3%
NETS								
Net: Positive	282 56%	241 55%	35 69%	6 65%	41 68%	217 81%	28 37%	18 16%
			a		a	fg	g	
Net: Negative	63 13%	58 13%	4 8%	1 8%	5 8%	1 *	6 8%	54 48%
						e	e	ef
Mean score	3.58	3.54	3.87	3.79	3.85	4.14	3.37	2.39
			a		a	fg	g	
Standard deviation	1.10	1.11	1.01	.96	1.00	.66	.93	1.12
Standard error	.05	.06	.10	.14	.08	.04	.11	.11

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q2_3. There are a number of ways that developing the shale gas industry in Lancashire could potentially impact on the local economy. What impact, if any, do you think that the development of a shale gas industry in Lancashire would have on...

The size of the local economy in Lancashire

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY			
		0-9	10-49	50+	10+	Positive	No impact	Negative	
		a	b	c	d	e	f	g	
Significance Level: 95%									
Unweighted Total	500	349	100	51	151	278	71	103	
Weighted Total	500	440	50	10	60	266	76	112	
	100%	100%	100%	100%	100%	100%	100%	100%	
Very positive	(5)	89	73	14	2	15	83	3	-
		18%	17%	27%	20%	26%	31%	3%	-
			a		a	fg			
Fairly positive	(4)	183	158	22	4	25	136	19	11
		37%	36%	43%	39%	42%	51%	26%	9%
			fg		g				
No impact	(3)	113	103	8	2	9	29	42	29
		23%	23%	15%	20%	16%	11%	55%	26%
			eg		e				
Fairly negative	(2)	45	43	2	1	3	6	6	30
		9%	10%	4%	6%	4%	2%	8%	27%
			d		ef				
Very negative	(1)	45	40	4	1	4	4	3	36
		9%	9%	7%	8%	7%	1%	4%	32%
			ef						
Don't know		25	23	2	1	3	8	3	6
		5%	5%	4%	8%	5%	3%	4%	5%
NETS									
Net: Positive		272	231	35	6	41	220	22	11
		54%	52%	70%	59%	68%	83%	29%	9%
			a		a	fg		g	
Net: Negative		90	83	6	1	7	10	9	67
		18%	19%	11%	14%	11%	4%	12%	59%
			d		ef		e		
Mean score	3.48	3.43	3.82	3.62	3.79	4.12	3.17	2.13	
			a		a	fg	g		
Standard deviation	1.18	1.18	1.12	1.21	1.13	.81	.80	1.00	
Standard error	.05	.06	.11	.18	.09	.05	.10	.10	

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q3_SUM. Companies involved in the shale gas industry could offer a number of benefits to the local area. Which of the following, if any, would you most like to see offered by a company fracking in Lancashire? Please rank them in order where 1 is the benefit you would most like to see and 4 the benefit you would least like to see.

SUMMARY TABLE

Base: All respondents

	Total	Giving priority for any new jobs created to local residents	Giving priority for any new contracts created to local businesses	Making a financial contribution to support the local community, such as for health or leisure facilities	Providing apprenticeships specifically for local residents	None of the above
1st choice	500 100%	162 32%	96 19%	83 17%	101 20%	57 11%
2nd choice	500 100%	126 25%	107 21%	75 15%	134 27%	57 11%
3rd choice	500 100%	106 21%	100 20%	108 22%	129 26%	57 11%
4th choice	500 100%	49 10%	139 28%	177 35%	78 16%	57 11%

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q3. Companies involved in the shale gas industry could offer a number of benefits to the local area. Which of the following, if any, would you most like to see offered by a company fracking in Lancashire? Please rank them in order where 1 is the benefit you would most like to see and 4 the benefit you would least like to see.

Top 2 summary

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Giving priority for any new jobs created to local residents	288	251	30	7	37	166	45	46
	58%	57%	60%	71%	62%	62%	60%	41%
						g	g	
Giving priority for any new contracts created to local businesses	204	177	23	4	27	119	33	32
	41%	40%	46%	41%	45%	45%	44%	29%
						g	g	
Making a financial contribution to support the local community, such as for health or leisure facilities	158	136	19	3	22	80	28	37
	32%	31%	38%	31%	37%	30%	37%	33%
Providing apprenticeships specifically for local residents	235	206	25	5	30	137	34	42
	47%	47%	50%	49%	50%	51%	45%	37%
						g		
No top 2	57	55	2	*	2	15	5	34
	11%	13%	3%	4%	3%	6%	7%	30%
		bd						ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q3. Companies involved in the shale gas industry could offer a number of benefits to the local area. Which of the following, if any, would you most like to see offered by a company fracking in Lancashire? Please rank them in order where 1 is the benefit you would most like to see and 4 the benefit you would least like to see.

Bottom 2 summary

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Giving priority for any new jobs created to local residents	155 31%	134 30%	19 37%	3 25%	21 35%	85 32%	25 33%	32 29%
Giving priority for any new contracts created to local businesses	239 48%	208 47%	26 51%	5 55%	31 52%	132 50%	37 49%	46 41%
Making a financial contribution to support the local community, such as for health or leisure facilities	284 57%	248 56%	30 59%	6 65%	36 60%	171 64%	42 56%	42 37%
						g	g	
Providing apprenticeships specifically for local residents	207 41%	179 41%	24 47%	5 47%	28 47%	114 43%	36 48%	37 33%
							g	
No bottom 2	57 11%	55 13%	2 3%	* 4%	2 3%	15 6%	5 7%	34 30%
		bd						ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q3. Companies involved in the shale gas industry could offer a number of benefits to the local area. Which of the following, if any, would you most like to see offered by a company fracking in Lancashire? Please rank them in order where 1 is the benefit you would most like to see and 4 the benefit you would least like to see.

Giving priority for any new jobs created to local residents

Base: All giving a ranking

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Priority 1	162	142	15	4	19	94	30	22
	32%	32%	30%	43%	32%	35%	40%	20%
						g	g	
Priority 2	126	108	15	3	18	72	15	24
	25%	25%	30%	27%	30%	27%	20%	21%
Priority 3	106	92	12	2	14	59	15	25
	21%	21%	24%	18%	23%	22%	20%	22%
Priority 4	49	42	7	1	7	26	10	7
	10%	9%	13%	8%	12%	10%	13%	7%
None	57	55	2	*	2	15	5	34
	11%	13%	3%	4%	3%	6%	7%	30%
		bd						ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q3. Companies involved in the shale gas industry could offer a number of benefits to the local area. Which of the following, if any, would you most like to see offered by a company fracking in Lancashire? Please rank them in order where 1 is the benefit you would most like to see and 4 the benefit you would least like to see.

Giving priority for any new contracts created to local businesses

Base: All giving a ranking

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Priority 1	96 19%	83 19%	11 22%	2 20%	13 22%	57 21%	17 22%	15 13%
Priority 2	107 21%	93 21%	12 24%	2 22%	14 24%	62 23%	16 22%	18 16%
Priority 3	100 20%	86 19%	12 23%	3 29%	14 24%	64 24%	13 17%	16 14%
Priority 4	139 28%	122 28%	14 28%	3 25%	17 28%	68 25%	25 33%	31 27%
None	57 11%	55 13%	2 3%	* 4%	2 3%	15 6%	5 7%	34 30%
		bd				g		ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q3. Companies involved in the shale gas industry could offer a number of benefits to the local area. Which of the following, if any, would you most like to see offered by a company fracking in Lancashire? Please rank them in order where 1 is the benefit you would most like to see and 4 the benefit you would least like to see.

Making a financial contribution to support the local community, such as for health or leisure facilities

Base: All giving a ranking

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Priority 1	83 17%	68 15%	14 28% ac	1 12%	15 25% ac	39 15%	12 16%	25 23%
Priority 2	75 15%	68 15%	5 10%	2 20%	7 12%	41 15%	16 22% g	11 10%
Priority 3	108 22%	96 22%	10 19%	2 24%	12 20%	53 20%	22 30%	20 17%
Priority 4	177 35%	153 35%	20 40%	4 41%	24 40%	118 44% fg	20 27%	22 20%
None	57 11%	55 13% bd	2 3%	* 4%	2 3%	15 6%	5 7%	34 30% ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q3. Companies involved in the shale gas industry could offer a number of benefits to the local area. Which of the following, if any, would you most like to see offered by a company fracking in Lancashire? Please rank them in order where 1 is the benefit you would most like to see and 4 the benefit you would least like to see.

Providing apprenticeships specifically for local residents

Base: All giving a ranking

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Priority 1	101	91	9	2	11	60	11	16
	20%	21%	17%	22%	18%	23%	15%	15%
Priority 2	134	115	17	3	19	76	23	25
	27%	26%	33%	27%	32%	29%	30%	23%
Priority 3	129	111	16	3	18	75	20	18
	26%	25%	31%	25%	30%	28%	27%	16%
						g		
Priority 4	78	68	8	2	10	40	16	18
	16%	15%	16%	22%	17%	15%	21%	16%
None	57	55	2	*	2	15	5	34
	11%	13%	3%	4%	3%	6%	7%	30%
		bd						ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q4_SUM. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least.

SUMMARY TABLE

Base: All giving a ranking

	Total	Supporting local businesses	Improving community facilities such as parks and leisure	Preserving the local environment	Improving local sustainability such as with flood defences	Providing opportunities for young people (e.g. more facilities for schools, nurseries and colleges)	None of the above
Priority 1	500 100%	96 19%	36 7%	178 36%	59 12%	81 16%	49 10%
Priority 2	490 100%	91 19%	57 12%	76 15%	99 20%	118 24%	49 10%
Priority 3	489 100%	96 20%	99 20%	62 13%	79 16%	103 21%	49 10%
Priority 4	488 100%	92 19%	103 21%	67 14%	91 19%	86 18%	49 10%
Priority 5	488 100%	68 14%	143 29%	61 13%	114 23%	52 11%	49 10%

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least.

Top 2 summary

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Supporting local businesses	187	168	17	3	20	107	34	28
	37%	38%	33%	31%	33%	40%	46%	25%
						g	g	
Improving community facilities such as parks and leisure	94	81	11	3	13	54	10	25
	19%	18%	21%	25%	22%	20%	13%	23%
Preserving the local environment	254	222	26	6	32	122	39	67
	51%	50%	51%	61%	53%	46%	51%	60%
								e
Improving local sustainability such as with flood defences	158	140	15	3	18	89	29	26
	32%	32%	30%	33%	31%	33%	38%	23%
							g	
Providing opportunities for young people (e.g. more facilities for schools, nurseries and colleges)	199	169	26	5	30	127	27	28
	40%	38%	51%	45%	50%	48%	35%	25%
			a		a	g		
No top 2	49	45	4	*	4	14	5	24
	10%	10%	7%	2%	6%	5%	7%	22%
								ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least.

Bottom 2 summary

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Supporting local businesses	160	137	19	4	23	86	22	38
	32%	31%	38%	35%	38%	32%	29%	34%
Improving community facilities such as parks and leisure	246	214	26	6	32	132	43	45
	49%	49%	52%	59%	53%	50%	57%	40%
Preserving the local environment	128	111	15	2	17	89	18	11
	26%	25%	30%	20%	28%	34%	24%	10%
Improving local sustainability such as with flood defences	206	180	21	5	26	111	28	47
	41%	41%	42%	45%	43%	42%	37%	42%
Providing opportunities for young people (e.g. more facilities for schools, nurseries and colleges)	139	124	12	3	15	71	25	33
	28%	28%	24%	29%	25%	27%	33%	30%
No bottom 2	61	57	4	1	4	21	8	25
	12%	13%	7%	6%	7%	8%	10%	22%
		d						ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least.

Supporting local businesses

Base: All giving a ranking

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	493	343	100	50	150	274	70	102
Weighted Total	492	433	50	10	60	261	74	112
	100%	100%	100%	100%	100%	100%	100%	100%
Priority 1	96 20%	88 20%	7 13%	2 16%	8 13%	56 22%	19 25%	15 14%
Priority 2	91 18%	79 18%	10 20%	2 16%	12 19%	51 20%	16 21%	13 12%
Priority 3	96 19%	82 19%	11 22%	3 30%	14 23%	54 21%	13 17%	21 19%
Priority 4	92 19%	78 18%	12 24%	2 20%	14 23%	54 21%	13 18%	16 14%
Priority 5	68 14%	59 14%	7 14%	2 16%	9 14%	31 12%	9 12%	22 20%
None	49 10%	45 10%	4 7%	* 2%	4 6%	14 5%	5 7%	24 22%
								ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least.

Improving community facilities such as parks and leisure

Base: All giving a ranking

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	490	340	100	50	150	271	69	103
Weighted Total	489	429	50	10	60	258	73	112
	100%	100%	100%	100%	100%	100%	100%	100%
Priority 1	36 7%	29 7%	7 13%	1 8%	7 12%	28 11%	3 4%	4 3%
			a		a	g		
Priority 2	57 12%	52 12%	4 8%	2 18%	6 10%	25 10%	7 10%	22 19%
								e
Priority 3	99 20%	88 21%	10 20%	1 12%	11 19%	58 23%	15 20%	17 15%
Priority 4	103 21%	91 21%	10 20%	2 24%	12 21%	52 20%	18 24%	23 21%
Priority 5	143 29%	124 29%	16 32%	4 36%	20 33%	80 31%	25 35%	22 20%
						g	g	
None	49 10%	45 11%	4 7%	* 2%	4 6%	14 5%	5 7%	24 22%
								ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least.

Preserving the local environment

Base: All giving a ranking

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	493	343	100	50	150	274	69	103
Weighted Total	492	433	50	10	60	262	73	112
	100%	100%	100%	100%	100%	100%	100%	100%
Priority 1	178 36%	159 37%	15 30%	4 42%	19 32%	76 29%	29 40%	52 46%
Priority 2	76 15%	63 15%	11 21%	2 20%	12 21%	46 17%	9 13%	15 13%
Priority 3	62 13%	54 13%	6 12%	2 16%	8 13%	37 14%	11 15%	9 8%
Priority 4	67 14%	59 14%	7 13%	1 8%	7 12%	46 18%	11 15%	6 5%
Priority 5	61 12%	52 12%	9 17%	1 12%	10 16%	43 16%	8 10%	6 5%
None	49 10%	45 10%	4 7%	* 2%	4 6%	14 5%	5 7%	24 22%
						g	g	ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least.

Improving local sustainability such as with flood defences

Base: All giving a ranking

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	493	343	100	50	150	273	70	102
Weighted Total	492	433	50	10	60	259	74	112
	100%	100%	100%	100%	100%	100%	100%	100%
Priority 1	59 12%	49 11%	8 16%	2 20%	10 17%	38 14%	9 12%	7 6%
Priority 2	99 20%	91 21%	7 14%	1 14%	8 14%	51 20%	20 27%	19 17%
Priority 3	79 16%	67 15%	11 21%	2 18%	12 21%	47 18%	13 17%	14 13%
Priority 4	91 19%	78 18%	11 22%	2 22%	13 22%	48 18%	12 16%	22 20%
Priority 5	114 23%	102 24%	10 20%	2 24%	12 21%	63 24%	16 21%	25 22%
None	49 10%	45 10%	4 7%	* 2%	4 6%	14 5%	5 7%	24 22%
								ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q4. If a shale gas industry was developed in Lancashire, which of the following do you think should be prioritised to benefit from taxes that would be paid by the industry? Please rank them in order where 1 is the area that should receive the most benefit and 5 the area that should receive the least.

Providing opportunities for young people (e.g. more facilities for schools, nurseries and colleges)

Base: All giving a ranking

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	491	341	100	50	150	273	69	102
Weighted Total	490	430	50	10	60	259	73	112
	100%	100%	100%	100%	100%	100%	100%	100%
Priority 1	81 17%	69 16%	11 21%	1 14%	12 20%	54 21%	11 15%	10 9%
						g		
Priority 2	118 24%	100 23%	15 30%	3 32%	18 30%	73 28%	16 21%	19 17%
						g		
Priority 3	103 21%	92 21%	9 18%	2 22%	11 19%	48 18%	16 22%	26 23%
Priority 4	86 18%	77 18%	7 14%	2 22%	9 15%	44 17%	15 20%	21 18%
Priority 5	52 11%	47 11%	5 10%	1 8%	6 10%	27 10%	10 14%	13 11%
None	49 10%	45 11%	4 7%	* 2%	4 6%	14 5%	5 7%	24 22%
								ef

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q6_SUM. Thinking now more generally about energy and the role of natural gas from shale, do you agree or disagree with each of the following statements?

SUMMARY TABLE

Base: All respondents

	Total	Agree	Neither agree nor disagree	Disagree	Don't know	Mean
The UK's energy supply is secure enough to keep the lights on and provide reliable power for my business over winters in the next five years	500 100%	360 72%	13 3%	103 21%	25 5%	2.54
The UK should prioritise domestic production of natural gas from shale over importing natural gas from overseas	500 100%	315 63%	35 7%	138 27%	12 2%	2.36
Replacing coal-fired power stations with natural gas power stations in the medium term (for example in the next 10-20 years) is the most efficient way for the UK to reduce greenhouse gas emissions	500 100%	281 56%	19 4%	154 31%	46 9%	2.28

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q6. Thinking now more generally about energy and the role of natural gas from shale, do you agree or disagree with each of the following statements?

The UK's energy supply is secure enough to keep the lights on and provide reliable power for my business over winters in the next five years

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Agree	(3) 360 72%	319 72%	33 66%	8 80%	41 68%	194 73%	59 78%	78 70%
Neither agree nor disagree	(2) 13 3%	11 3%	1 2%	* 2%	1 2%	7 2%	1 2%	3 3%
Disagree	(1) 103 21%	88 20%	13 26%	1 14%	14 24%	57 21%	13 17%	23 20%
Don't know	25 5%	21 5%	3 6%	* 4%	3 6%	8 3%	3 4%	8 7%
Mean score	2.54	2.55	2.43	2.69	2.47	2.53	2.64	2.53
Standard deviation	.83	.82	.90	.75	.88	.83	.77	.83
Standard error	.04	.04	.09	.11	.07	.05	.09	.09

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q6. Thinking now more generally about energy and the role of natural gas from shale, do you agree or disagree with each of the following statements?

The UK should prioritise domestic production of natural gas from shale over importing natural gas from overseas

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Agree	(3) 315 63%	271 62%	38 75%	7 67%	44 74%	215 81%	40 53%	33 29%
			a		a	fg	g	
Neither agree nor disagree	(2) 35 7%	33 7%	2 4%	1 6%	3 4%	11 4%	6 8%	14 12%
							e	e
Disagree	(1) 138 27%	127 29%	8 16%	2 22%	10 17%	38 14%	27 36%	64 57%
		bd					e	ef
Don't know	12 2%	9 2%	3 5%	1 6%	3 5%	2 1%	1 2%	2 2%
Mean score	2.36	2.33	2.62	2.48	2.60	2.67	2.18	1.72
			a		a	fg	g	
Standard deviation	.89	.90	.76	.89	.78	.71	.95	.90
Standard error	.04	.05	.08	.13	.07	.04	.11	.09

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q6. Thinking now more generally about energy and the role of natural gas from shale, do you agree or disagree with each of the following statements?

Replacing coal-fired power stations with natural gas power stations in the medium term (for example in the next 10-20 years) is the most efficient way for the UK to reduce greenhouse gas emissions

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Agree	(3) 281 56%	246 56%	29 58%	6 61%	35 58%	180 68%	41 55%	37 33%
						fg	g	
Neither agree nor disagree	(2) 19 4%	16 4%	3 6%	- -	3 5%	15 6%	3 3%	2 2%
Disagree	(1) 154 31%	137 31%	14 28%	3 27%	17 28%	52 20%	27 36%	61 54%
							e	ef
Don't know	46 9%	40 9%	4 8%	1 12%	5 9%	19 7%	4 6%	13 11%
Mean score	2.28	2.27	2.33	2.38	2.33	2.52	2.20	1.76
						fg	g	
Standard deviation	.94	.94	.92	.98	.92	.82	.97	.97
Standard error	.04	.05	.10	.15	.08	.05	.12	.10

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q7_SUM. Over the next ten years, do you think that each of the following will grow, remain the same size or decline?

SUMMARY TABLE

Base: All respondents

	Total	Grow	Remain the same size	Decline	Don't know
The Lancashire economy	500	333	93	54	21
	100%	67%	19%	11%	4%
Your business	500	322	133	33	12
	100%	64%	27%	7%	2%

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q7. Over the next ten years, do you think that each of the following will grow, remain the same size or decline?

The Lancashire economy

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Grow	333	290	36	7	43	198	49	58
	67%	66%	72%	73%	72%	75%	64%	51%
						g		
Remain the same size	93	83	9	1	9	43	13	28
	19%	19%	17%	10%	16%	16%	18%	25%
Decline	54	47	6	1	7	21	10	18
	11%	11%	11%	14%	11%	8%	13%	16%
								e
Don't know	21	20	-	*	*	3	4	9
	4%	5%	-	4%	1%	1%	5%	8%
		bd		b			e	e

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q7. Over the next ten years, do you think that each of the following will grow, remain the same size or decline?

Your business

Base: All respondents

	NUMBER OF EMPLOYEES					PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
	Total	0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Grow	322	280	34	8	42	170	45	76
	64%	64%	68%	76%	69%	64%	60%	68%
Remain the same size	133	120	12	2	13	73	24	24
	27%	27%	23%	18%	22%	28%	31%	21%
Decline	33	29	4	*	4	14	6	9
	7%	7%	8%	4%	7%	5%	7%	8%
Don't know	12	11	1	*	1	8	1	3
	2%	3%	1%	2%	1%	3%	2%	2%

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q8_SUM. There are a number of industries with a presence in Lancashire. What impact, if any, do you think that the presence of each of these industries has on the Lancashire economy?

SUMMARY TABLE

Base: All respondents

	Total	Very positive	Fairly positive	No impact	Fairly negative	Very negative	Don't know	Net: Positive	Net: Negative	Mean
Aerospace	500 100%	233 47%	119 24%	83 17%	15 3%	16 3%	34 7%	353 71%	31 6%	4.16
Digital and creative	500 100%	107 21%	193 39%	124 25%	24 5%	9 2%	43 9%	300 60%	33 7%	3.80
Advanced manufacturing (including automotive)	500 100%	141 28%	164 33%	112 22%	32 6%	14 3%	37 7%	304 61%	46 9%	3.83
Professional and business services	500 100%	113 23%	233 47%	101 20%	12 2%	14 3%	27 5%	346 69%	26 5%	3.89
Energy and environmental	500 100%	112 22%	203 41%	100 20%	28 6%	22 4%	35 7%	315 63%	50 10%	3.76
Tourism	500 100%	159 32%	162 32%	110 22%	37 7%	23 5%	8 2%	321 64%	61 12%	3.81
Food and drink	500 100%	157 31%	196 39%	95 19%	19 4%	15 3%	19 4%	353 71%	33 7%	3.96

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q8_1. There are a number of industries with a presence in Lancashire. What impact, if any, do you think that the presence of each of these industries has on the Lancashire economy?

Aerospace

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Very positive	(5) 233 47%	206 47%	25 49%	3 31%	28 46%	131 49%	34 45%	51 45%
		c	c					
Fairly positive	(4) 119 24%	102 23%	14 28%	3 33%	17 29%	72 27%	16 21%	22 19%
No impact	(3) 83 17%	77 17%	4 7%	2 22%	6 9%	39 15%	17 23%	23 20%
		bd		bd				
Fairly negative	(2) 15 3%	13 3%	2 3%	* 4%	2 3%	4 1%	4 6%	4 4%
						e		
Very negative	(1) 16 3%	15 3%	1 2%	* 2%	1 2%	4 1%	2 2%	9 8%
								e
Don't know	34 7%	28 6%	6 11%	1 8%	6 10%	17 6%	3 4%	4 3%
NETS								
Net: Positive	353 71%	308 70%	39 77%	6 65%	45 75%	202 76%	49 65%	72 65%
						g		
Net: Negative	31 6%	28 6%	3 5%	1 6%	3 5%	8 3%	6 8%	13 12%
							e	e
Mean score	4.16	4.14	4.34	3.96	4.27	4.29	4.04	3.93
			c			fg		
Standard deviation	1.05	1.06	.93	1.02	.95	.89	1.08	1.27
Standard error	.05	.06	.10	.15	.08	.06	.13	.13

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q8_2. There are a number of industries with a presence in Lancashire. What impact, if any, do you think that the presence of each of these industries has on the Lancashire economy?

Digital and creative

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Very positive (5)	107 21%	93 21%	12 24%	1 14%	13 22%	53 20%	16 21%	25 22%
Fairly positive (4)	193 39%	169 38%	20 39%	5 49%	24 41%	113 43%	25 33%	39 35%
No impact (3)	124 25%	108 25%	12 24%	3 31%	15 25%	64 24%	24 32%	29 25%
Fairly negative (2)	24 5%	21 5%	3 5%	- -	3 4%	12 4%	6 7%	4 4%
Very negative (1)	9 2%	8 2%	2 3%	- -	2 3%	3 1%	3 3%	4 4%
Don't know	43 9%	40 9%	3 5%	1 6%	3 5%	22 8%	3 3%	11 10%
NETS								
Net: Positive	300 60%	262 60%	32 63%	6 63%	38 63%	166 62%	41 54%	64 57%
Net: Negative	33 7%	29 7%	4 8%	- -	4 7%	14 5%	8 11%	8 7%
			c					
Mean score	3.80	3.80	3.80	3.81	3.80	3.83	3.63	3.76
Standard deviation	.92	.92	.99	.70	.94	.86	1.02	1.01
Standard error	.04	.05	.10	.10	.08	.05	.12	.10

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q8_3. There are a number of industries with a presence in Lancashire. What impact, if any, do you think that the presence of each of these industries has on the Lancashire economy?

Advanced manufacturing (including automotive)

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Very positive	(5) 28%	121 28%	17 34%	3 27%	20 33%	88 33%	20 26%	23 20%
						g		
Fairly positive	(4) 33%	144 33%	16 32%	4 39%	20 33%	98 37%	15 20%	35 31%
						f		
No impact	(3) 22%	101 23%	9 18%	2 24%	11 19%	50 19%	22 29%	32 28%
							e	
Fairly negative	(2) 6%	29 7%	3 6%	* 4%	3 6%	12 4%	11 15%	7 6%
							e	
Very negative	(1) 3%	11 3%	3 5%	- -	3 4%	3 1%	2 3%	9 8%
							e	
Don't know	37 7%	34 8%	3 5%	1 6%	3 5%	15 6%	5 7%	7 7%
NETS								
Net: Positive	304 61%	265 60%	33 66%	7 67%	40 66%	186 70%	35 46%	58 52%
						fg		
Net: Negative	46 9%	40 9%	6 11%	* 4%	6 10%	15 5%	14 18%	15 14%
							e	e
Mean score	3.83	3.82	3.88	3.96	3.90	4.02	3.55	3.54
						fg		
Standard deviation	1.03	1.03	1.13	.89	1.09	.92	1.16	1.15
Standard error	.05	.06	.12	.13	.09	.06	.14	.12

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q8_4. There are a number of industries with a presence in Lancashire. What impact, if any, do you think that the presence of each of these industries has on the Lancashire economy?

Professional and business services

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Very positive (5)	113 23%	98 22%	13 26%	2 16%	15 24%	63 24%	19 26%	18 16%
Fairly positive (4)	233 47%	204 46%	24 47%	6 57%	29 49%	134 50%	29 39%	49 44%
No impact (3)	101 20%	91 21%	8 16%	2 20%	10 17%	46 17%	18 24%	29 26%
Fairly negative (2)	12 2%	9 2%	3 6%	* 2%	3 5%	5 2%	5 6%	2 2%
Very negative (1)	14 3%	13 3%	1 2%	* 2%	1 2%	5 2%	- -	7 7%
Don't know	27 5%	25 6%	2 3%	* 4%	2 3%	13 5%	4 5%	6 6%
NETS								
Net: Positive	346 69%	303 69%	37 73%	7 73%	44 73%	197 74%	49 64%	67 60%
Net: Negative	26 5%	21 5%	4 8%	* 4%	4 7%	10 4%	5 6%	10 9%
Mean score	3.89	3.88	3.92	3.86	3.91	3.97	3.88	3.64
Standard deviation	.90	.90	.94	.83	.91	.83	.89	1.02
Standard error	.04	.05	.10	.12	.08	.05	.11	.10

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q8_5. There are a number of industries with a presence in Lancashire. What impact, if any, do you think that the presence of each of these industries has on the Lancashire economy?

Energy and environmental

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Very positive (5)	112 22%	95 21%	15 30%	2 24%	17 29%	73 27%	19 25%	10 9%
						g	g	
Fairly positive (4)	203 41%	180 41%	19 38%	4 39%	23 38%	124 47%	24 32%	37 33%
						fg		
No impact (3)	100 20%	92 21%	6 12%	2 18%	8 13%	40 15%	22 29%	32 28%
		bd					e	e
Fairly negative (2)	28 6%	23 5%	5 9%	1 6%	5 8%	12 4%	4 5%	10 9%
Very negative (1)	22 4%	19 4%	3 5%	1 6%	3 5%	6 2%	3 4%	13 11%
								e
Don't know	35 7%	32 7%	3 6%	1 8%	4 6%	12 5%	4 5%	11 10%
NETS								
Net: Positive	315 63%	275 62%	34 68%	6 63%	40 67%	197 74%	43 57%	47 42%
						fg		
Net: Negative	50 10%	42 9%	7 14%	1 12%	8 14%	18 7%	7 9%	23 20%
								ef
Mean score	3.76	3.76	3.84	3.74	3.82	3.97	3.73	3.22
						g	g	
Standard deviation	1.03	1.02	1.14	1.17	1.14	.92	1.05	1.16
Standard error	.05	.06	.12	.17	.10	.06	.13	.12

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q8_6. There are a number of industries with a presence in Lancashire. What impact, if any, do you think that the presence of each of these industries has on the Lancashire economy?

Tourism

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Very positive	(5) 32%	140 32%	17 33%	2 24%	19 31%	81 30%	21 28%	42 37%
Fairly positive	(4) 32%	139 32%	20 39%	4 41%	24 39%	102 39%	20 27%	23 21%
No impact	(3) 22%	100 23%	8 16%	2 24%	10 17%	59 22%	23 31%	22 19%
Fairly negative	(2) 7%	34 8%	3 6%	* 4%	3 6%	17 6%	7 10%	11 10%
Very negative	(1) 5%	20 5%	3 5%	* 4%	3 5%	7 2%	3 3%	12 11%
Don't know	8 2%	8 2%	1 1%	* 4%	1 1%	1 *	1 2%	3 2%
NETS								
Net: Positive	321 64%	279 63%	36 72%	6 65%	42 71%	183 69%	41 55%	65 58%
Net: Negative	61 12%	54 12%	6 11%	1 8%	6 10%	23 9%	10 13%	23 21%
Mean score	3.81	3.80	3.90	3.80	3.88	3.88	3.68	3.65
Standard deviation	1.11	1.12	1.10	1.05	1.08	1.00	1.10	1.37
Standard error	.05	.06	.11	.15	.09	.06	.13	.14

Columns Tested: a,b,c,d - e,f,g

Survey of Lancashire Businesses - perceptions on the impact of the shale gas industry in Lancashire

Q8_7. There are a number of industries with a presence in Lancashire. What impact, if any, do you think that the presence of each of these industries has on the Lancashire economy?

Food and drink

Base: All respondents

	Total	NUMBER OF EMPLOYEES				PERCEIVED IMPACT ON LANCASHIRE ECONOMY		
		0-9	10-49	50+	10+	Positive	No impact	Negative
		a	b	c	d	e	f	g
Significance Level: 95%								
Unweighted Total	500	349	100	51	151	278	71	103
Weighted Total	500	440	50	10	60	266	76	112
	100%	100%	100%	100%	100%	100%	100%	100%
Very positive	(5) 31%	139 32%	16 31%	3 29%	18 31%	85 32%	20 27%	37 33%
Fairly positive	(4) 39%	168 38%	24 48%	4 41%	28 47%	115 43%	28 37%	34 31%
No impact	(3) 19%	88 20%	5 10%	2 20%	7 12%	53 20%	19 25%	21 19%
Fairly negative	(2) 4%	16 4%	2 4%	* 4%	2 4%	3 1%	4 5%	7 6%
Very negative	(1) 3%	11 3%	3 6%	* 2%	3 5%	2 1%	4 5%	8 7%
Don't know	19 4%	18 4%	1 1%	* 4%	1 1%	7 3%	1 2%	5 5%
NETS								
Net: Positive	353 71%	306 70%	40 79%	7 71%	47 78%	200 75%	48 64%	71 63%
Net: Negative	33 7%	28 6%	5 10%	1 6%	6 9%	6 2%	7 10%	15 13%
Mean score	3.96	3.96	3.95	3.96	3.95	4.07	3.77	3.79
Standard deviation	.98	.97	1.07	.98	1.05	.82	1.06	1.21
Standard error	.04	.05	.11	.14	.09	.05	.13	.12

Columns Tested: a,b,c,d - e,f,g