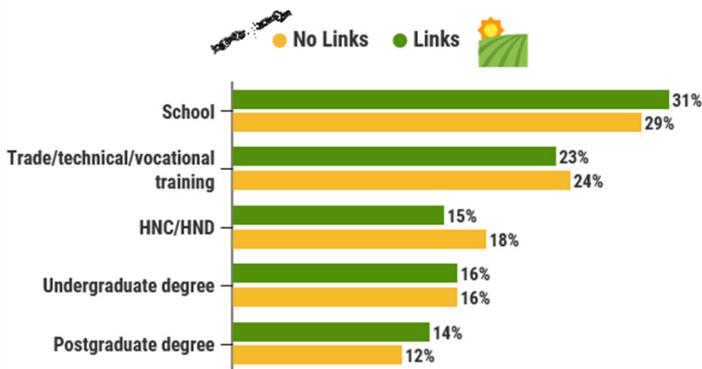
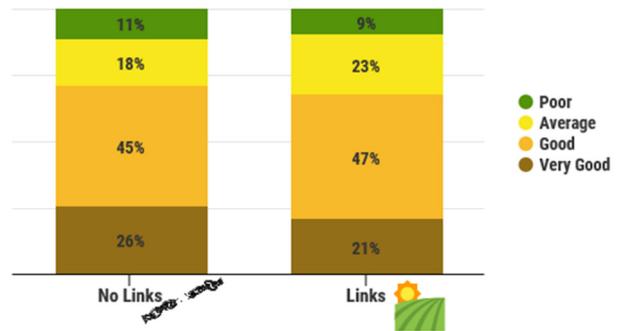




**Business people with links to land-based sector had similar educational attainment to those without links**



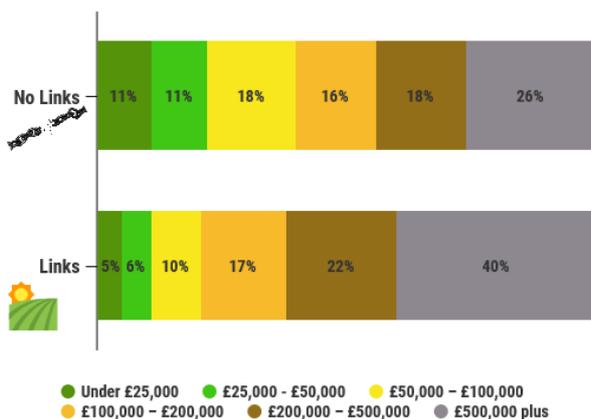
**Operating Environment**



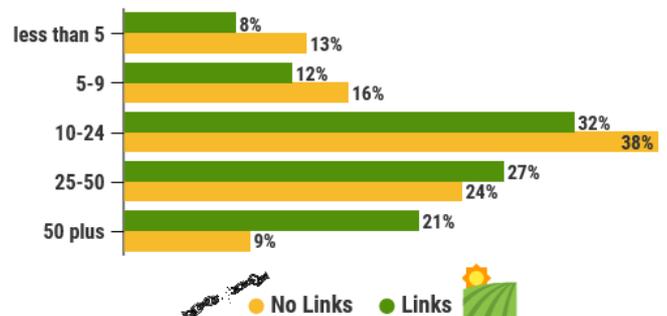
**Businesses linked to the land-based sector were less likely to classify 2016-17 as a very good year**

**Those linked to the land-based sector had larger turnovers, on average**

**Business Turnover**



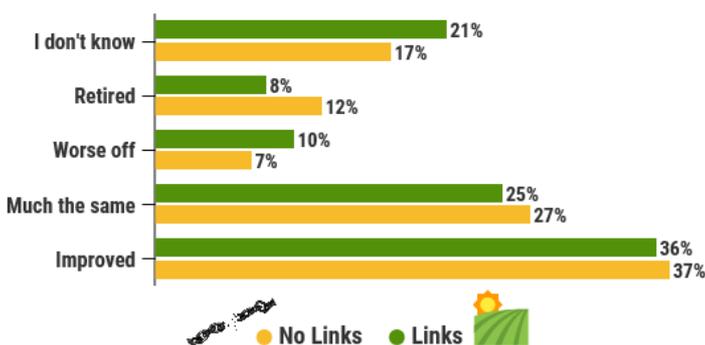
**Business Age**



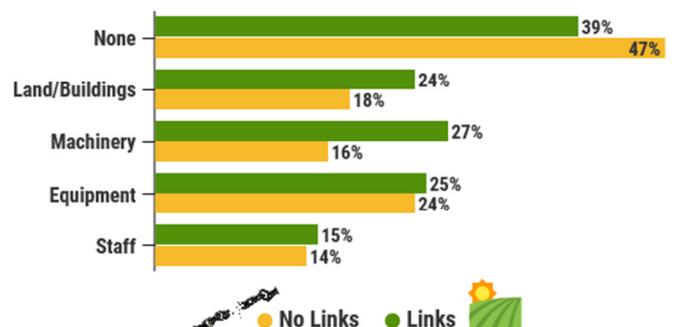
**Businesses with links to the land based sector were generally longer established, with 20% over 50 yrs**

**Those linked with the land-based sector were less positive about the future, but were less likely to retire by 2022**

**5 Year Outlook**



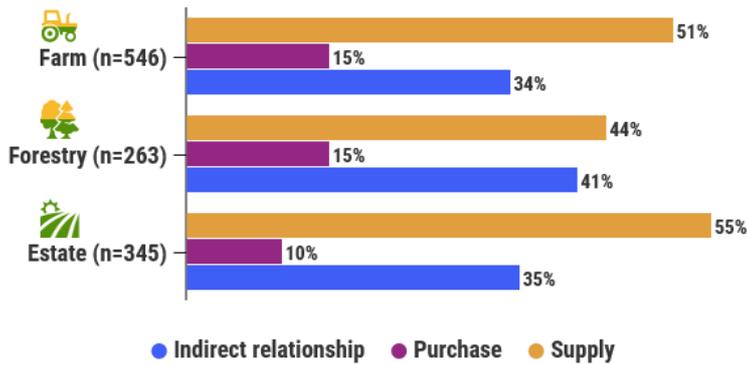
**5 Year Investment Plans**



**Businesses linked to the land-based sector were more likely to invest in their business by 2022, particularly in land & buildings and machinery**

# Links to Land-based Sector

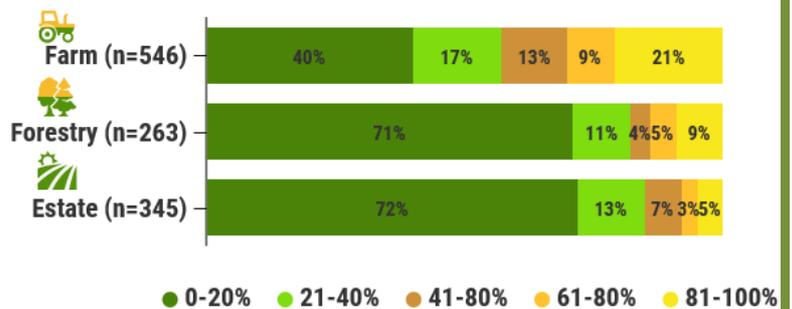
## Nature of the Relationship



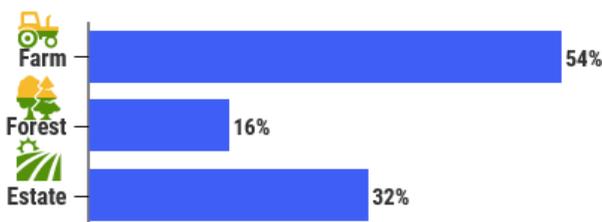
*The most common form of linkage to the land-based sector was as suppliers. In each sector about 30%-40% of businesses had indirect relationships. About 10%-15% of businesses with links were purchasing goods and services from the land based sector.*

*Businesses linked to farming tended to have a higher reliance on the sector - i.e. they specialised in servicing farming. 1/5 of those with links to farming were more than 80% reliant on it for their turnover. 3/4 of those linked to forestry and estates got less than 20% of their business turnover from these sectors.*

## % Business Turnover from Sector

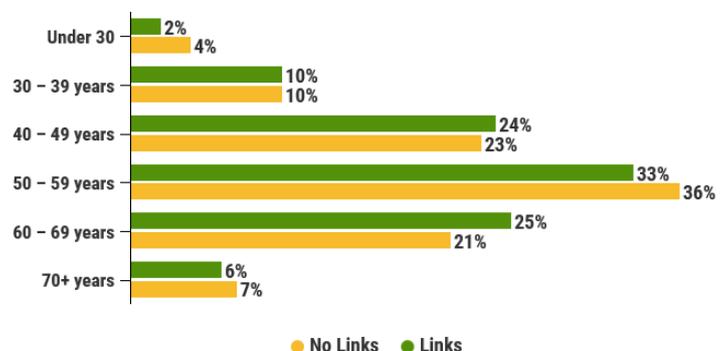


## Sectoral Cashflow Problems

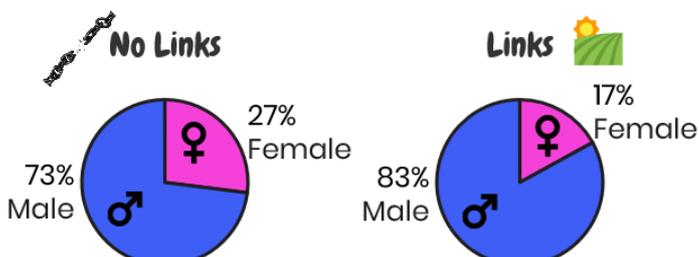


*Of those with links to the land-based sector, 54% had witnessed cashflow problems in the farming sector between 2015 and 2017. Only 32% had seen problems in the estate sector and only 16% in the forestry sector. About 55 businesses said these issues had negative impacts on their business performance.*

## Age of Owners / Partners / Directors

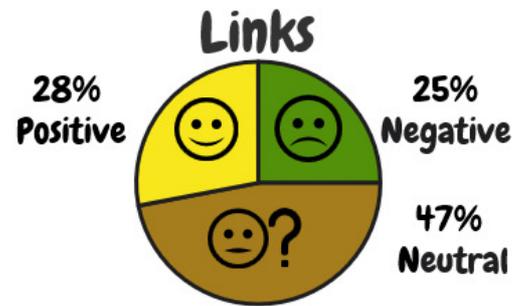
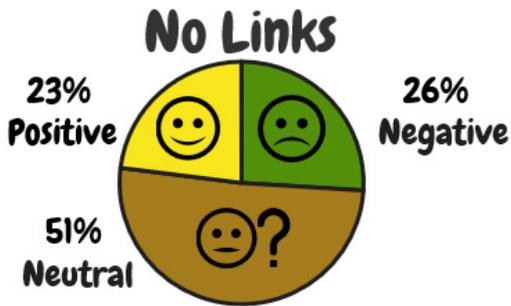


*There was little difference in the age profile of the owners, partners and directors of those linked to the land-based sector and those that were not.*



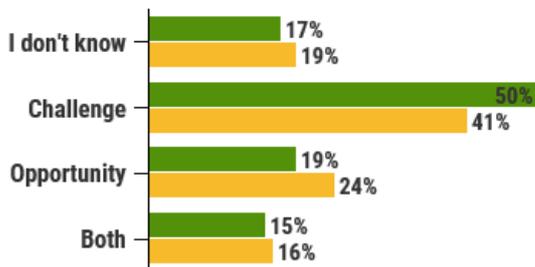
*Women accounted for only 17% of the business owners / partners / directors with links to the land-based sector, but 27% of those without links.*

# BREXIT

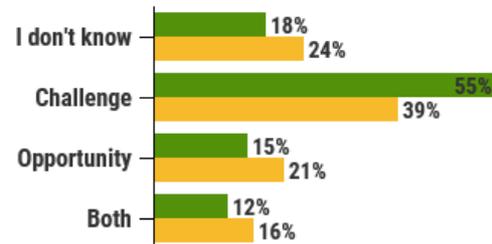


*Businesses with land-based sector links were slightly more optimistic about the impacts of Brexit on their business*

## Regular Labour

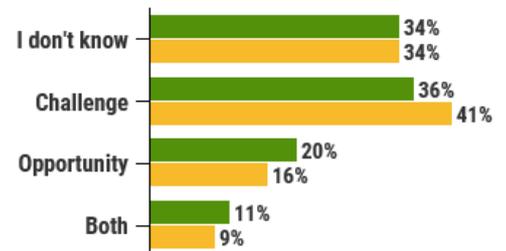


## Seasonal Labour

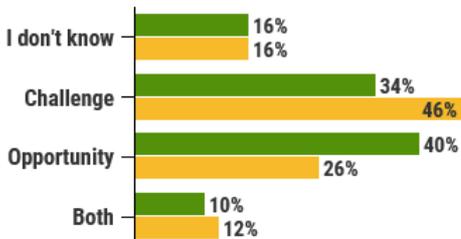


*More than 50% of the businesses with links to the land-based sector perceived post-Brexit access to regular and seasonal labour as a challenge (compared to about 40% of those without links). Those linked to the land-based sector were more optimistic about post-Brexit opportunities for exports although 59% thought importing would be more challenging. A lot of uncertainty remains over access to finance and business regulations*

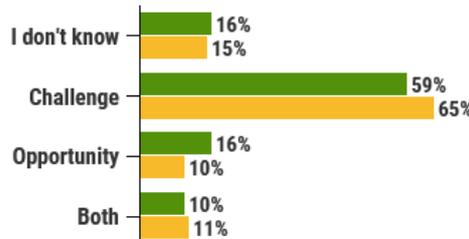
## Access to Private Finance



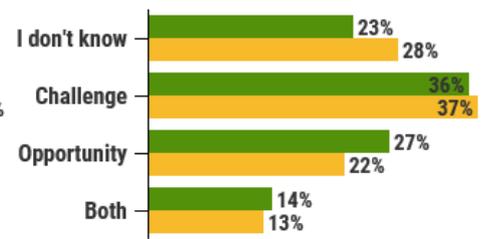
## Exports



## Imports



## Business Regulations



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Full report from: [www.sruc.ac.uk/ruralbusinesssurvey](http://www.sruc.ac.uk/ruralbusinesssurvey)

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