

AYRSHIRE CHAMBER OF
COMMERCE REPORT

QUARTERLY ECONOMIC SURVEY

BROUGHT TO YOU BY



Q2
2026

Business confidence softens as firms face renewed pressure

The latest Ayrshire Quarterly Economic Survey suggests businesses are entering a more challenging phase of 2026. While many firms continue to demonstrate resilience, the optimism evident at the start of the year has given way to greater caution as demand softens, confidence weakens and cost pressures remain stubbornly high.

Across both domestic and international markets, businesses report a slowdown in trading activity compared with the previous quarter. At the same time, confidence in future turnover and profitability has fallen, reflecting concern over rising operating costs and continued economic uncertainty. Cashflow constraints and subdued investment intentions also indicate that many firms remain focused on protecting margins and managing risk rather than pursuing significant expansion.

Inflation, taxation, business rates, labour costs and utilities continue to dominate business concerns. Although fewer firms expect to raise prices in the coming months, many businesses report that cost pressures remain difficult to absorb and continue to influence investment and recruitment decisions. Despite these challenges, there are signs of underlying resilience in the Ayrshire economy. Recruitment activity remains strong and many businesses continue to invest selectively in their workforce and operations. However, the survey highlights a growing skills challenge, with employers reporting increasing difficulty in finding suitable candidates across a range of occupations.

The regional findings reinforce the importance of creating a more supportive environment for business growth. Respondents consistently point to the cumulative impact of taxation, employer costs, business rates and energy prices, while calling for greater recognition of Ayrshire's economic challenges and opportunities within national policymaking.

Overall, the survey presents a picture of an economy that remains resilient but is facing mounting headwinds. The challenge for policymakers and partners is to create the conditions that support investment, improve competitiveness and unlock growth, ensuring that business resilience can translate into renewed confidence and long-term economic success.

Key findings at a glance

- **Demand weakens:** UK sales growth fell from 39% in Q1 to 23% in Q2, while UK orders growth reduced from 32% to 29%, indicating softer customer demand and reduced forward pipelines.
- **Export performance softens:** Overseas sales growth declined from 26% to 15%, while overseas orders growth eased from 25% to 21%, suggesting global uncertainty is beginning to affect exporters.
- **Confidence retreats:** 41% of businesses expect turnover to improve over the next 12 months, down from 58% in Q1, while 30% now expect profitability to worsen, reflecting mounting concern over margins and trading conditions.
- **Cashflow pressure increases:** Nearly one-third of businesses (32%) reported worsening cashflow during the quarter, more than double the proportion reporting improvement (14%).
- **Cost pressures remain dominant:** Inflation is now the most significant concern for Ayrshire businesses (68%), followed by taxation (50%) and business rates (42%), all of which continue to constrain investment and growth.
- **Utilities become a growing challenge:** 71% of firms report utilities are putting upward pressure on prices, alongside labour costs (72%), highlighting the continued burden of operating costs.
- **Recruitment demand remains strong:** 64% of businesses attempted to recruit during the quarter, up from 53% in Q1, demonstrating continued workforce demand despite economic uncertainty.
- **Skills shortages intensify:** 90% of firms attempting to recruit experienced difficulties finding suitable candidates, most commonly in skilled technical, professional and semi-skilled roles.
- **Investment remains cautious:** Only 12% increased investment in plant and machinery while 34% reduced investment, indicating businesses remain reluctant to commit capital amid ongoing uncertainty.
- **Businesses seek a more pro-growth environment:** 72% of respondents do not believe the Scottish Government understands the needs of Ayrshire businesses, while business rates reform, tax incentives and energy cost support emerge as the most frequently cited priorities for growth.

Methodology

Economic & Political Context

The Ayrshire Quarterly Economic Survey (QES) was conducted between 11 May and 8 June 2026. During this period, 111 Ayrshire businesses participated, representing more than 12,212 employees. Nationally, the survey gathered 4,744 responses from businesses across the UK.

Headline QES indicators are based on 111 unique business responses, while the Ayrshire-specific regional analysis is based on 114 responses. To maintain consistency with national QES reporting, duplicate submissions were removed from the core economic indicators but retained within the regional section where they provided additional qualitative insight and local context.

The survey was managed by Ayrshire Chamber of Commerce, with analysis undertaken by Research Chamber, the research agency within Aberdeen & Grampian Chamber of Commerce. The QES is the UK's largest and longest-running independent business sentiment survey and is closely monitored by organisations including HM Treasury, the Bank of England and the Office for Budget Responsibility.

Businesses are asked whether key indicators such as sales, orders, cashflow, investment, recruitment and business confidence have increased, decreased or remained unchanged compared with the previous quarter. Responses are collected online and contribute to the wider UK Quarterly Economic Survey, enabling comparison between Ayrshire and national business trends.

Results should be interpreted within the wider economic context of Q2 2026. The survey was undertaken during a period of continued global uncertainty, persistent cost pressures and ongoing volatility in energy markets. These factors, together with developments emerging during late Q1, may have influenced business sentiment around costs, demand, investment and future trading conditions.

Important note on tracking data

Where this report shows trend data from 2024 Q1–Q4 and 2025 Q1–Q3, these figures are drawn from the previous Ayrshire Chamber Quarterly Economic Indicator (QEI) survey rather than the British Chambers of Commerce Quarterly Economic Survey (QES) methodology now in use. The two surveys are closely aligned in theme but not identical in design or sampling. As a result, any historical comparisons should be regarded as indicative only and not as a direct like-for-like tracking series. This edition establishes the first full baseline using the BCC QES framework.

Following this, narrative points and insights are limited to data from Q1 2026, focusing on the current data set Q2 2026.



The headlines

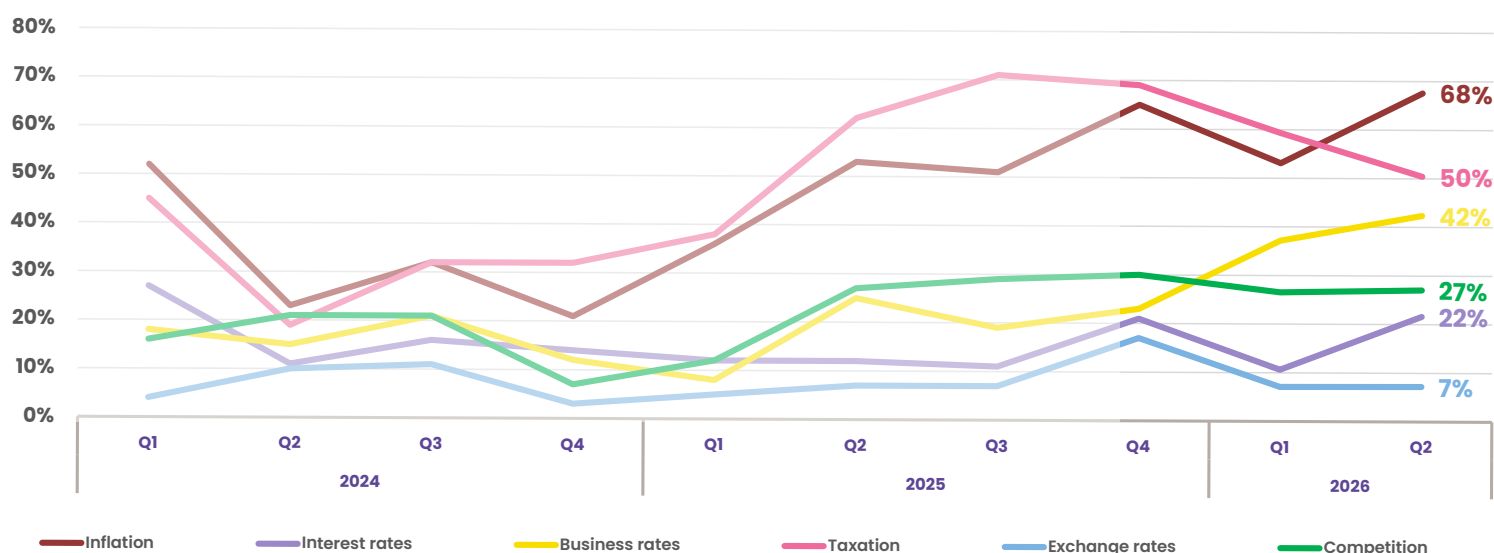
Inflation and business rates dominate the policy concern picture

Inflation has re-emerged as the most significant concern for Ayrshire businesses, rising from 53% in Q1 to 68% in Q2, closely mirroring the UK trend where concern increased from 41% to 66%.

Taxation also remains elevated, with around half of Ayrshire businesses identifying it as a greater concern than three months ago, broadly in line with the UK picture.

However, the most notable regional divergence is business rates: concern in Ayrshire increased from 37% to 42%, while the UK figure fell from 38% to 35%. This suggests that, alongside wider inflationary pressures, local businesses are experiencing a sharper and more persistent concern around the burden of business rates than the national average.

Q: Please indicate which of these following factors are more of a concern to your business than 3 months ago?



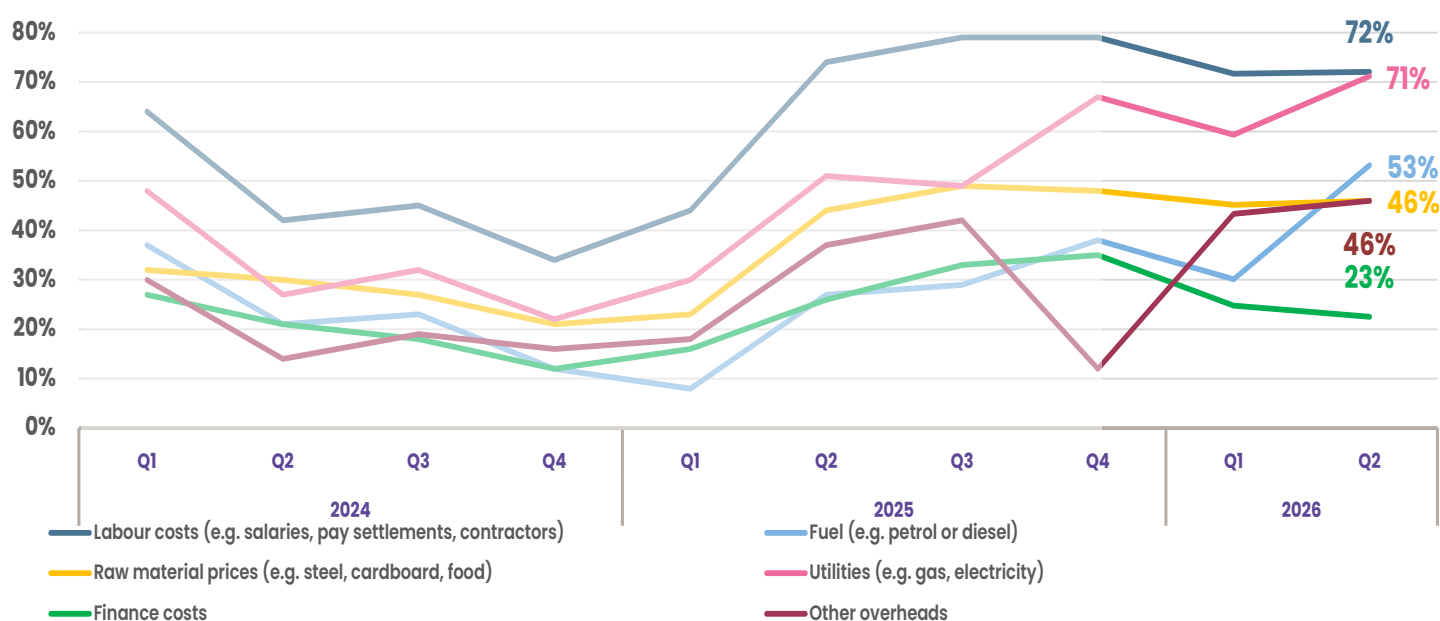
	Inflation	Taxation	Business rates	Competition	Interest rates	Exchange rates
Ayrshire	68%	50%	42%	27%	22%	7%
UK	66%	51%	35%	32%	29%	13%

Cost pressures remain widespread, led by labour, utilities and fuel

Labour costs continue to be the primary driver of price pressures for Ayrshire businesses, affecting more than seven in ten firms (72%), slightly above the UK average. Utility costs increased sharply over the quarter, rising from 59% to 71%, making Ayrshire businesses significantly more likely than their UK counterparts to report energy-related cost pressures. Fuel costs also rose markedly, affecting 53% of firms, although this trend was reflected nationally. Raw material costs and wider overheads remain elevated, with Ayrshire businesses reporting higher levels of pressure than the UK average in both categories. In contrast, finance cost pressures eased slightly during the quarter.

Overall, the data indicates that rising operating costs—particularly labour, energy and other overheads—continue to place significant upward pressure on prices across the Ayrshire business community.

Q: Is your business currently suffering pressures to raise its prices from any of the following?



	Ayrshire	UK	% point difference, region v UK
Labour costs	72%	70%	2%
Utilities	71%	56%	15%
Raw materials	46%	42%	4%
Fuel	53%	52%	1%
Finance	23%	24%	-1%
Other	46%	34%	12%

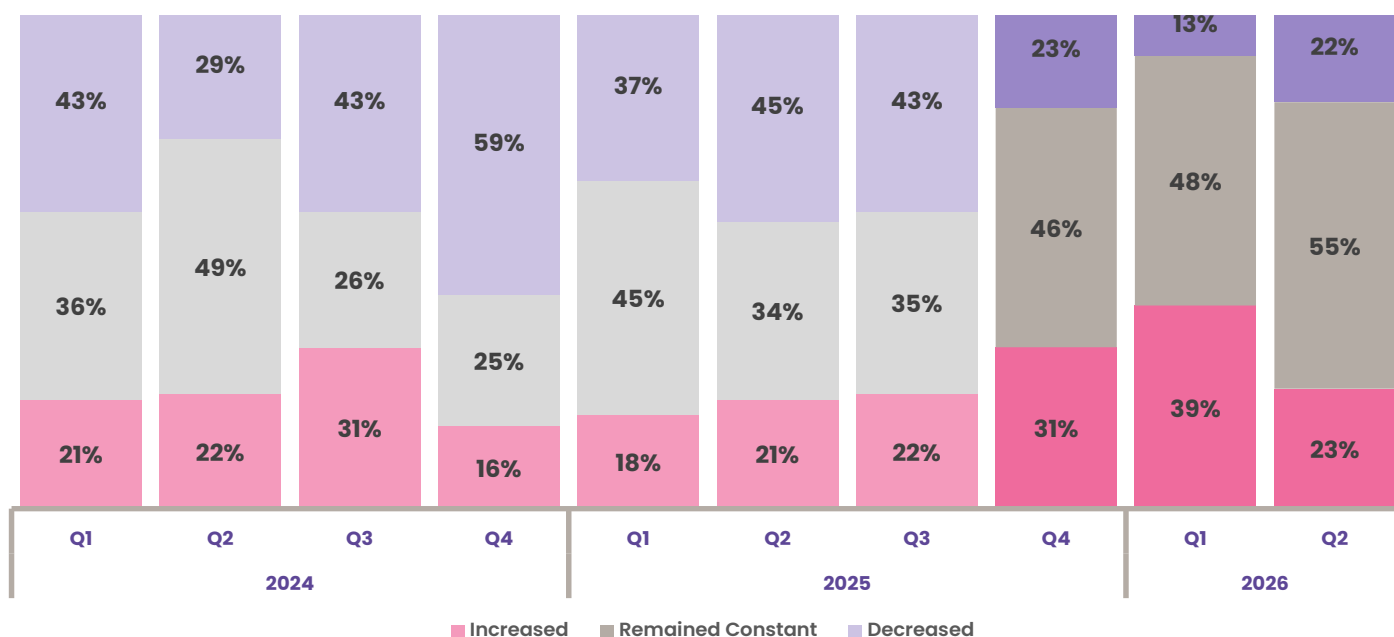
Domestic outlook

Domestic demand weakens more sharply than the UK average

The proportion of Ayrshire businesses reporting increased UK sales fell sharply from 39% in Q1 to 23% in Q2, indicating a significant slowdown in domestic demand. While demand also softened nationally, the UK decline was less pronounced, with businesses reporting increased sales falling from 32% to 29%.

Ayrshire also saw a notable rise in businesses reporting decreased sales, from 13% to 22%, although this remains below the UK Q2 figure of 27%. Overall, the data suggests that Ayrshire businesses experienced a sharper loss of sales momentum than the UK average, with more firms moving into a position of flat or declining domestic demand.

Q: Excluding seasonal variations, over the past 3 months 'UK sales/custom/bookings' have...



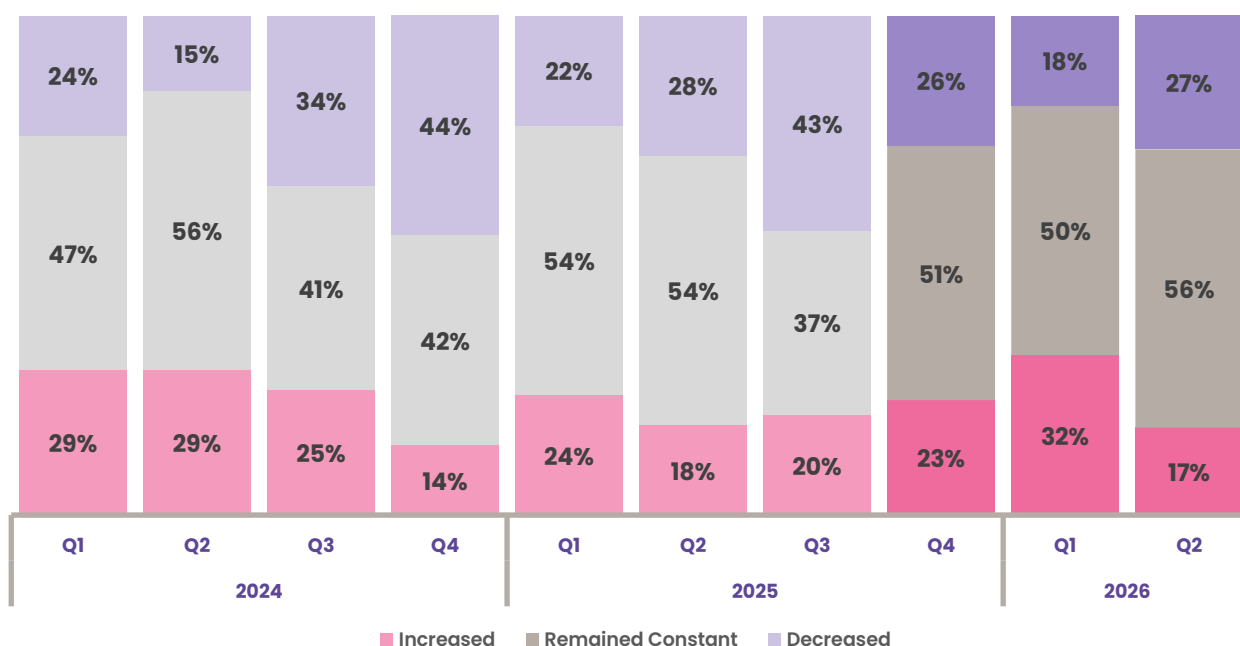
	Ayrshire	UK	% point difference, region v UK
Increased	23%	29%	-6%
Remained Constant	55%	44%	11%
Decreased	22%	27%	-5%

Forward order books signal increasing caution

The proportion of Ayrshire businesses reporting increased UK orders or advance bookings fell sharply from 32% in Q1 to 17% in Q2, signalling a marked weakening in forward pipelines. This decline was considerably sharper than the UK trend, where reported growth fell from 28% to 23%.

Ayrshire also saw businesses reporting decreased orders rise from 18% to 26.7%, while the proportion reporting no change increased to 55.8%. Although Ayrshire's Q2 decline figure remains slightly below the UK level of 29%, the scale of the quarter-on-quarter shift suggests local businesses are entering the second half of the year with weaker order momentum and heightened caution among customers.

Q: Excluding seasonal variations, over the past 3 months 'UK orders/advance custom/bookings' have...



	Ayrshire	UK	% point difference, region v UK
Increased	17%	23%	-6%
Remained Constant	56%	48%	8%
Decreased	27%	29%	-2%

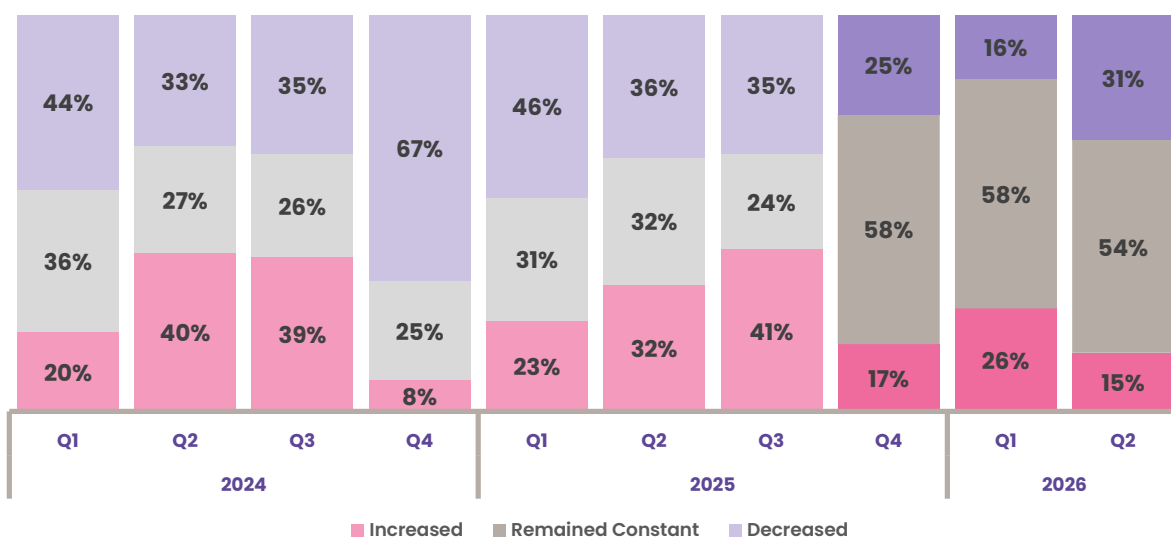
Overseas Sales

Export demand weakens significantly in Ayrshire

The proportion of Ayrshire businesses reporting increased overseas sales or bookings fell from 26% in Q1 to 15% in Q2, indicating a sharp slowdown in international demand. At the same time, the share reporting declining overseas sales almost doubled from 16% to 31%.

While export performance also softened across the UK, the deterioration was considerably more pronounced in Ayrshire, where both the fall in growth and rise in declining sales exceeded the national trend. This suggests that Ayrshire exporters faced a more challenging trading environment during Q2, with weakening overseas demand placing increased pressure on international sales performance.

Q: Excluding seasonal variations, over the past 3 months 'Overseas sales/custom/bookings' have...

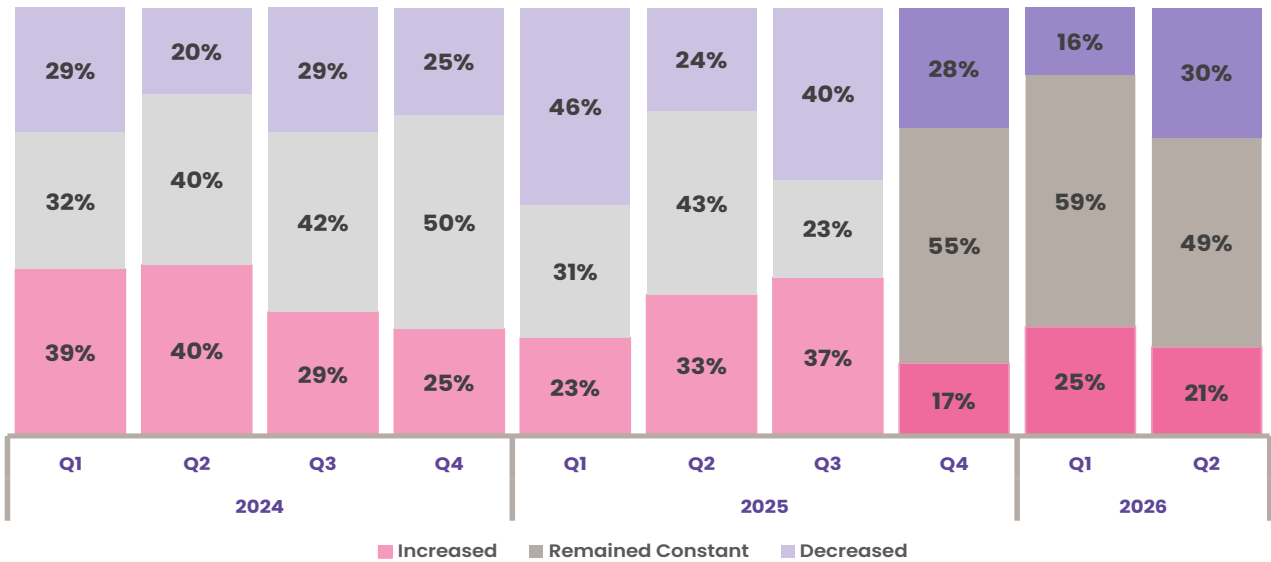


	Ayrshire	UK	% point difference, region v UK
Increased	15%	18%	-3%
Remained Constant	54%	57%	-3%
Decreased	31%	25%	6%

Export order books weaken amid softer international demand

Export order books present a mixed picture. Ayrshire businesses were more likely than the UK average to report both increasing export orders (21% vs 16%) and declining orders (30% vs 26%), suggesting a more polarised export environment. While some exporters continue to secure growth opportunities, others are experiencing a sharper deterioration in international demand.

Q: Excluding seasonal variations, over the past 3 months ‘Overseas orders/advance custom/bookings’ have:



	Ayrshire	UK	% point difference, region v UK
Increased	21%	16%	5%
Remained Constant	49%	58%	-9%
Decreased	30%	26%	4%

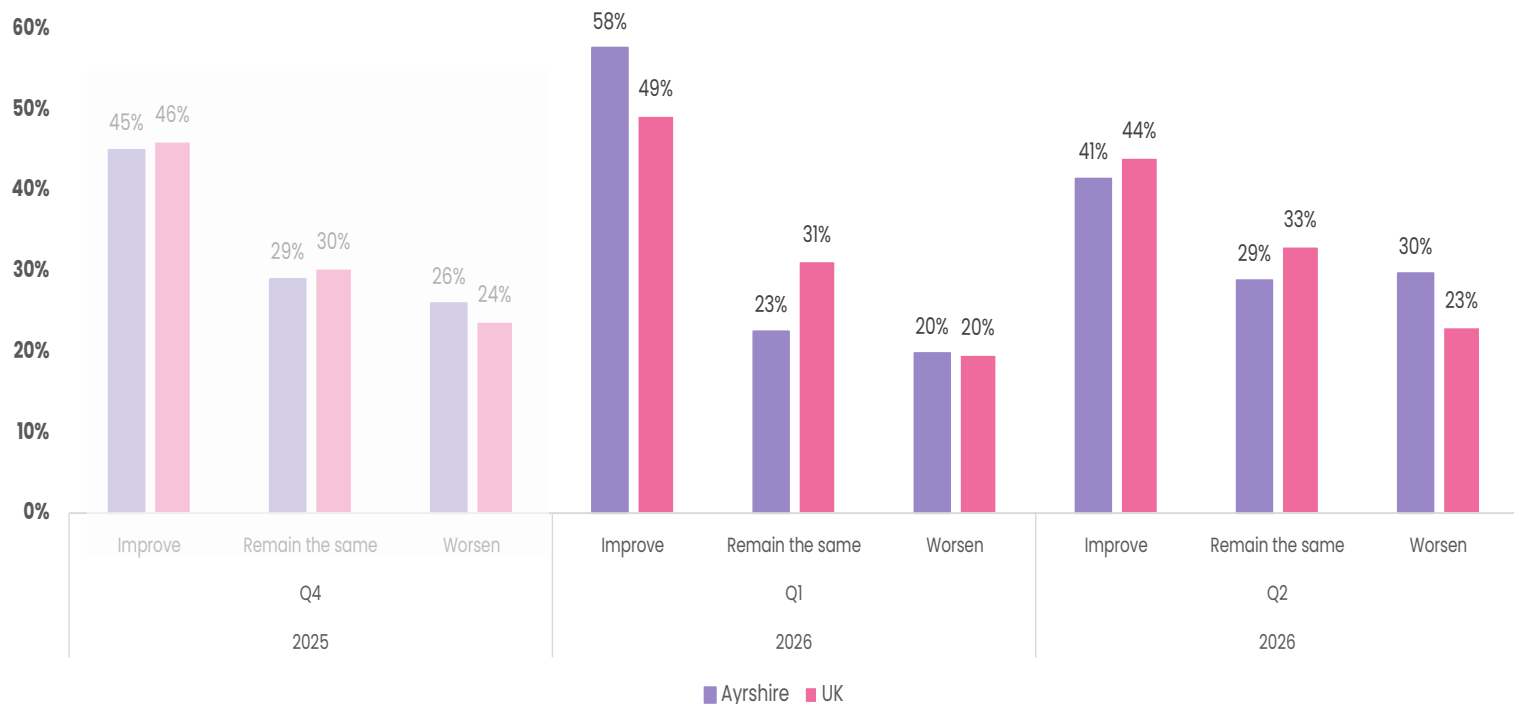


Turnover outlook

Confidence retreats and falls below Q1 levels

Just 41% of businesses expect turnover to improve over the next twelve months, down from 58% in Q1. Compared with national results, Ayrshire firms appear more cautious about future growth, reflecting concern over demand, costs and wider economic uncertainty.

Q: Over the next 12 months, do you believe your business's turnover will...



	Ayrshire	UK	% point difference, region v UK
Improve	41%	44%	-3%
Remain the same	29%	33%	-4%
Worsen	30%	23%	7%

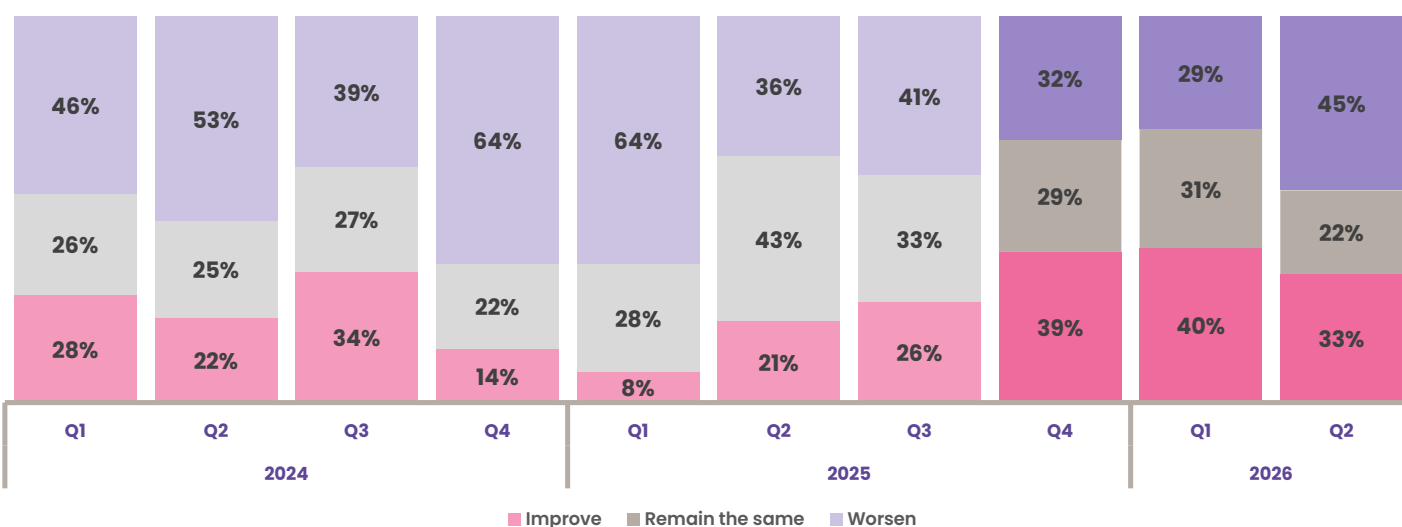
Profitability outlook

Margin pressure drives a more pessimistic outlook

Only one-third of Ayrshire businesses expect profitability to improve over the next 12 months, while 45% expect it to worsen. This represents a significant deterioration from Q1 and reflects growing concern that rising operating costs will continue to erode margins.

Ayrshire businesses are notably more pessimistic than their UK counterparts, with a significantly higher proportion expecting profitability to worsen (45% compared with 33% nationally). The findings suggest local firms are feeling the cumulative impact of cost pressures more acutely than businesses across the UK, despite signs of resilience elsewhere in the economy.

Q: Over the next 12 months, do you believe your business's profitability will...



	Ayrshire	UK	% point difference, region v UK
Improve	33%	35%	-2%
Remain the same	22%	32%	-10%
Worsen	45%	33%	12%

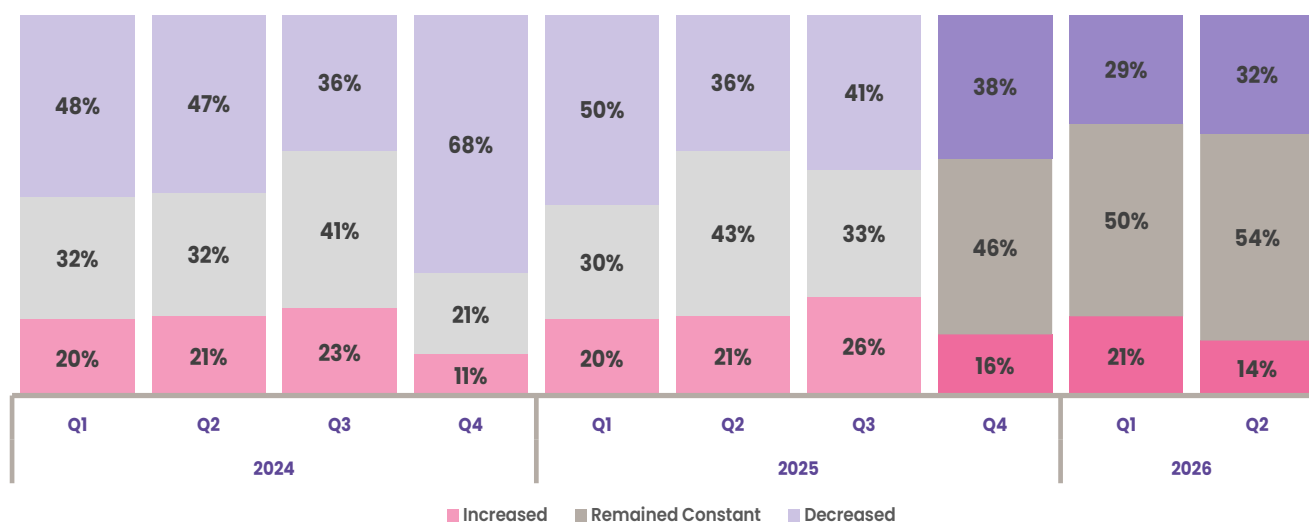
Cash Flow pressure

Cashflow pressures remain above the national average

Cashflow remains a significant challenge for Ayrshire businesses, with 32% reporting a deterioration over the past three months compared with just 14% reporting an improvement.

Cashflow conditions remain challenging. While the proportion reporting worsening cashflow is broadly in line with the UK picture (32% vs 33%), Ayrshire businesses were less likely to report improving cashflow (14% vs 20%), suggesting businesses continue to experience limited financial headroom despite stable trading conditions.

Q: Over the past 3 months, cash flow has..



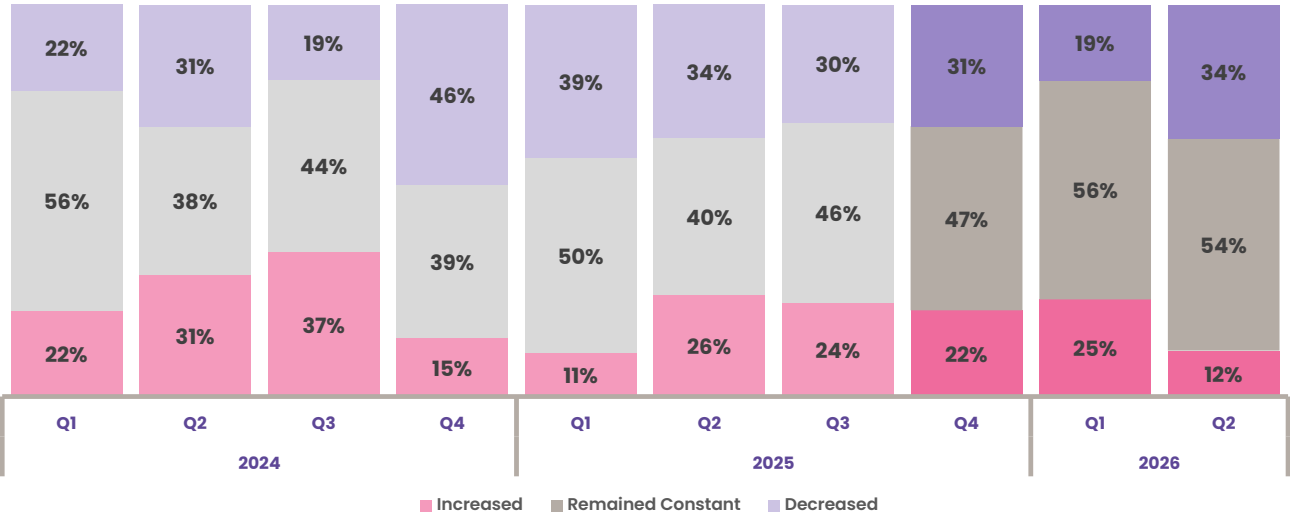
	Ayrshire	UK	% point difference, region v UK
Increased	14%	20%	-6%
Remained constant	54%	47%	7%
Decreased	32%	33%	-1%

Capital investment remains subdued amid economic uncertainty

Investment intentions remain cautious, with just 12% of Ayrshire businesses increasing investment in plant, machinery or equipment over the past three months, while 54% maintained existing investment levels and 34% reduced spending.

Compared with Q1, the results indicate continued reluctance among businesses to commit to significant capital expenditure as they navigate weaker demand, rising costs and pressure on profitability. Compared with the UK picture, Ayrshire businesses were less likely to increase investment (12% vs 17%) and more likely to reduce investment (34% vs 26%), suggesting a more cautious approach to capital spending locally.

Q: Over the past 3 months, investment plans for plant/machinery/equipment have?



	Ayrshire	UK	% point difference, region v UK
Increased	12%	17%	-5%
Remained constant	54%	57%	-3%
Decreased	34%	26%	8%



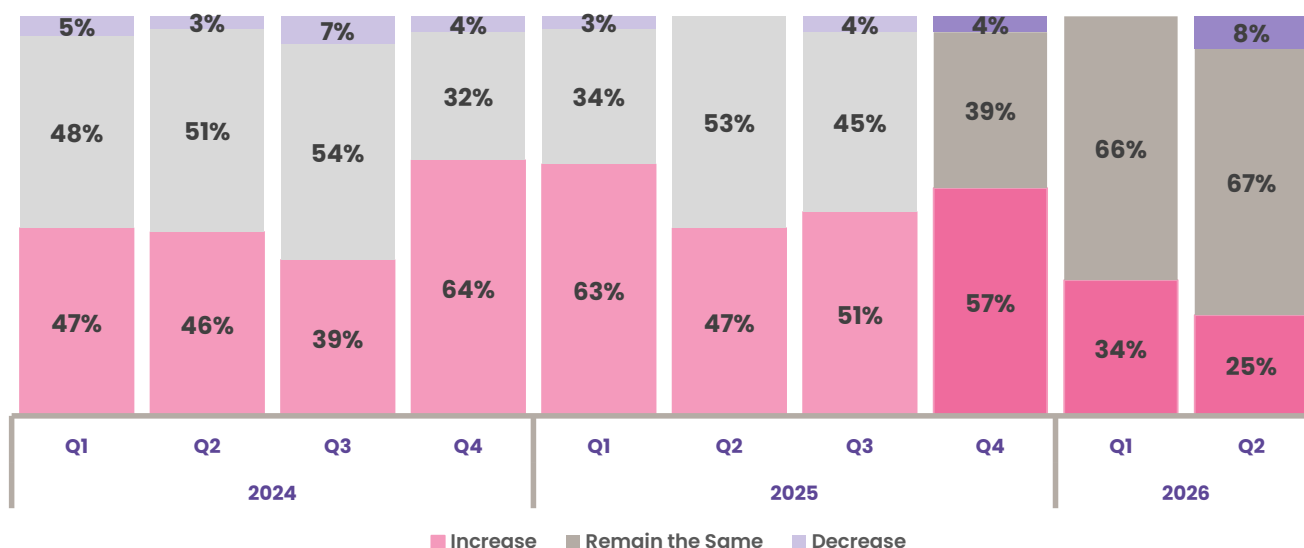
Pricing

Businesses show greater pricing restraint than the UK average

Only 25% of Ayrshire businesses expect to increase their prices over the next three months, compared with 48% nationally. While cost pressures remain significant—particularly around labour, utilities and fuel—two-thirds of respondents expect prices to remain unchanged.

This suggests many Ayrshire businesses are absorbing rising costs rather than passing them on to customers, reflecting a more competitive and price-sensitive trading environment than is being experienced across the UK.

Q: Over the next 3 months, do you expect the price of your goods/services to..



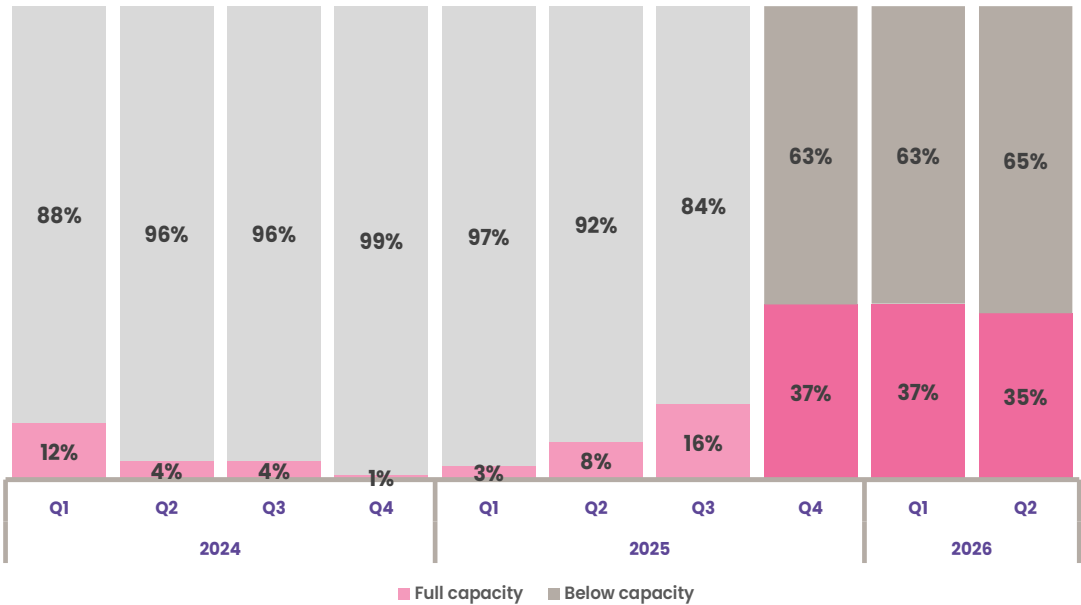
	Ayrshire	UK	% point difference, region v UK
Increase	25%	48%	-23%
Remain the same	67%	49%	18%
Decrease	8%	3%	5%

More businesses report spare capacity as demand softens

Nearly two-thirds of Ayrshire businesses (65%) reported operating below full capacity during Q2, up from 63% in Q1. Conversely, the proportion operating at full capacity fell from 37% to 35%.

Compared with the national picture, Ayrshire businesses were slightly less likely to be operating at full capacity (35% vs 37%) and more likely to report spare capacity. This reflects the softer demand and weaker order books reported elsewhere in the survey, while also indicating there is capacity within the local economy to support future growth should trading conditions improve.

Q: Are you currently operating at..



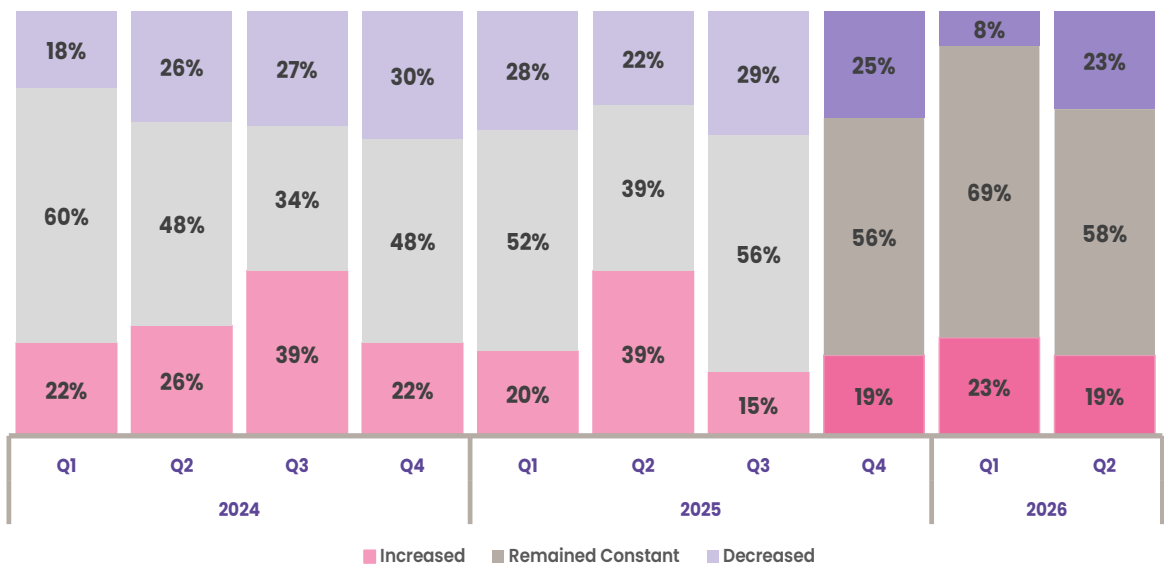
	Ayrshire	UK	% point difference, region v UK
Full capacity	35%	37%	-2%
Below capacity	65%	63%	2%

Workforce levels remain broadly stable despite a softer trading environment

Most Ayrshire businesses (58%) reported no change in workforce levels over the past three months, while 19% increased staffing and 23% reduced headcount.

Compared with the UK picture, Ayrshire saw slightly lower workforce growth (19% vs 21%) and a higher proportion of businesses reducing staff numbers (23% vs 18%). This suggests that while employers continue to recruit, workforce expansion has slowed locally as businesses respond to weaker demand, lower confidence and ongoing cost pressures.

Q: Over the past 3 months, has your workforce...



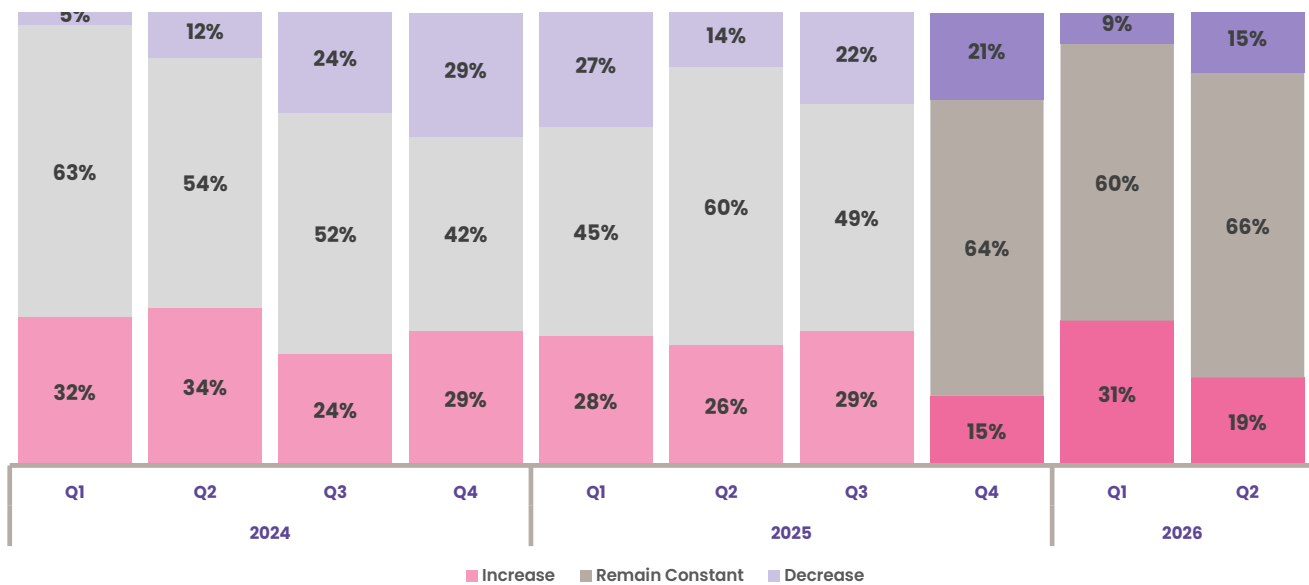
	Ayrshire	UK	% point difference, region v UK
Increased	19%	21%	-2%
Remained Constant	58%	61%	-3%
Decreased	23%	18%	5%

Employers remain cautious despite a stable employment outlook

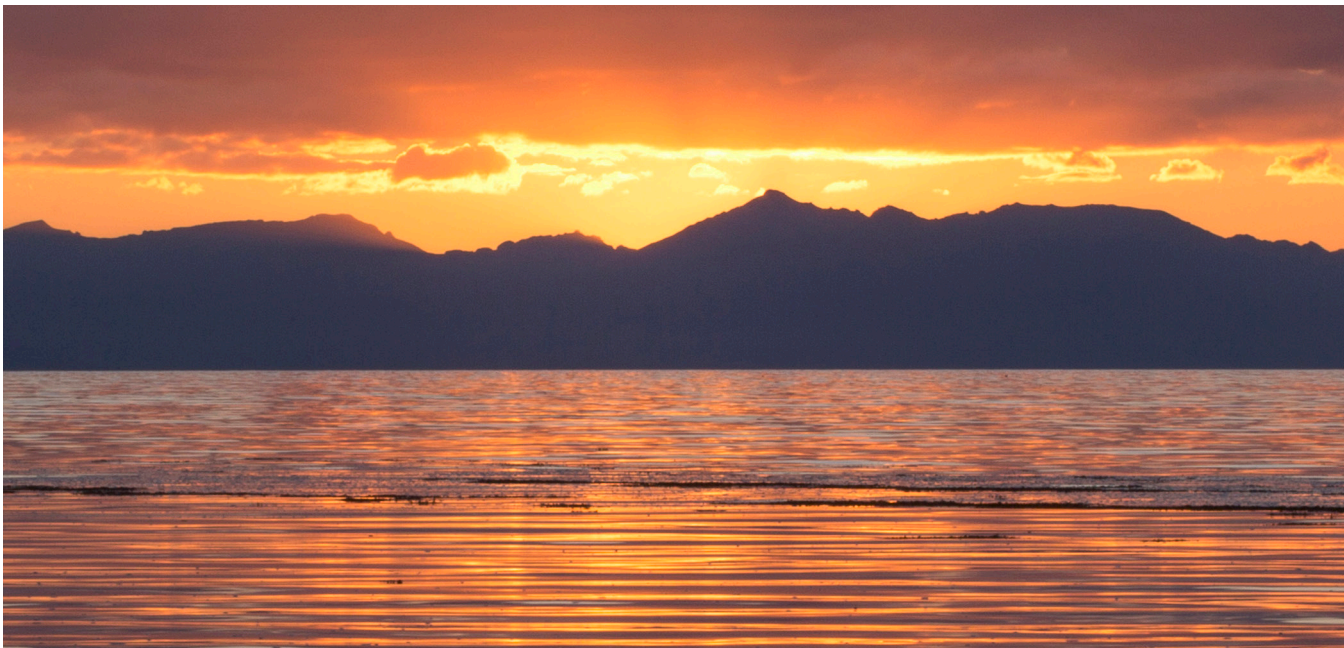
Most Ayrshire businesses (66%) expect workforce levels to remain unchanged over the next three months, while 19% anticipate increasing staffing levels and 15% expect their workforce to reduce.

Compared with the national picture, Ayrshire businesses are slightly less likely to plan workforce growth (19% vs 23%) and more likely to anticipate reductions in staffing levels (15% vs 11%). This suggests that while the employment outlook remains broadly stable, local businesses are taking a more cautious approach to recruitment and expansion amid weaker demand and continued cost pressures.

Q: Over the next 3 months, do you expect your workforce to...



	Ayrshire	UK	% point difference, region v UK
Increased	19%	23%	-4%
Remained Constant	66%	66%	-
Decreased	15%	11%	4%



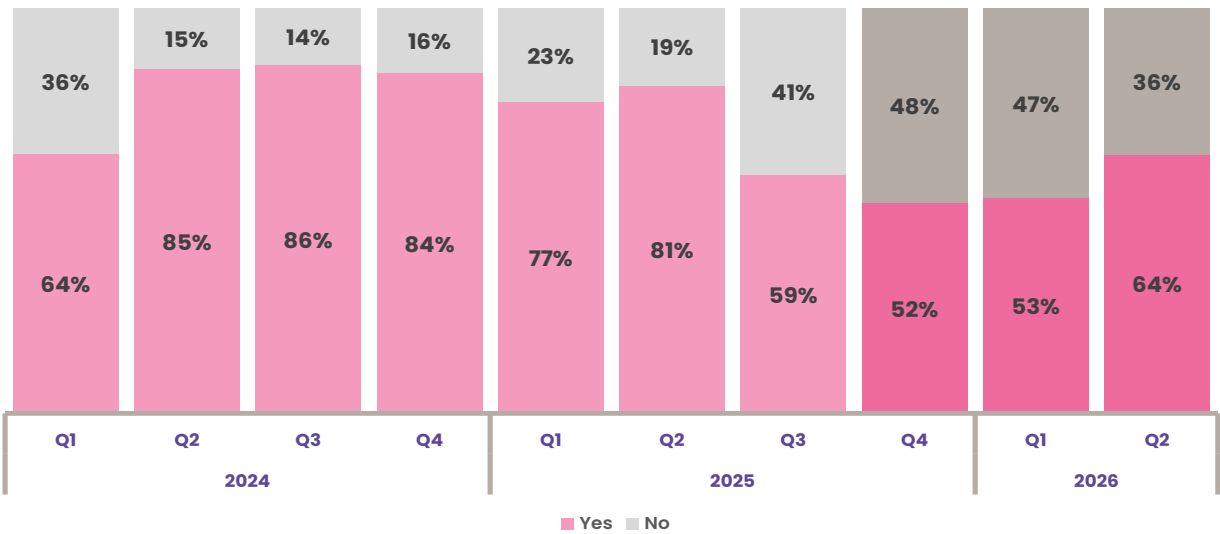
N.B. figures are rounded to the nearest whole number/percentage; consistent with previous survey editions.

Recruitment Activity

Businesses continue hiring despite economic uncertainty

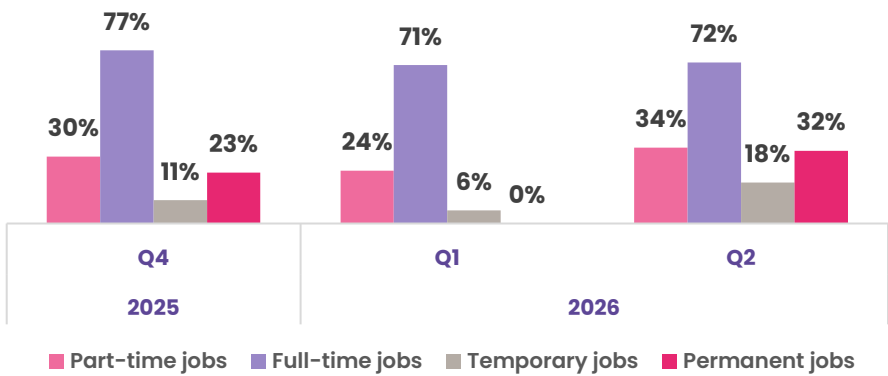
Recruitment activity increased from 53% in Q1 to 64% in Q2, exceeding the national position. This suggests that, despite softer demand and weakening confidence, many Ayrshire businesses continue to seek talent and invest in workforce capacity.

Q: Have you attempted to recruit staff over the past 3 months?



	Ayrshire	UK	% point difference, region v UK
Yes	64%	53%	11%
No	36%	47%	-11%

Q: If yes, what were they for?

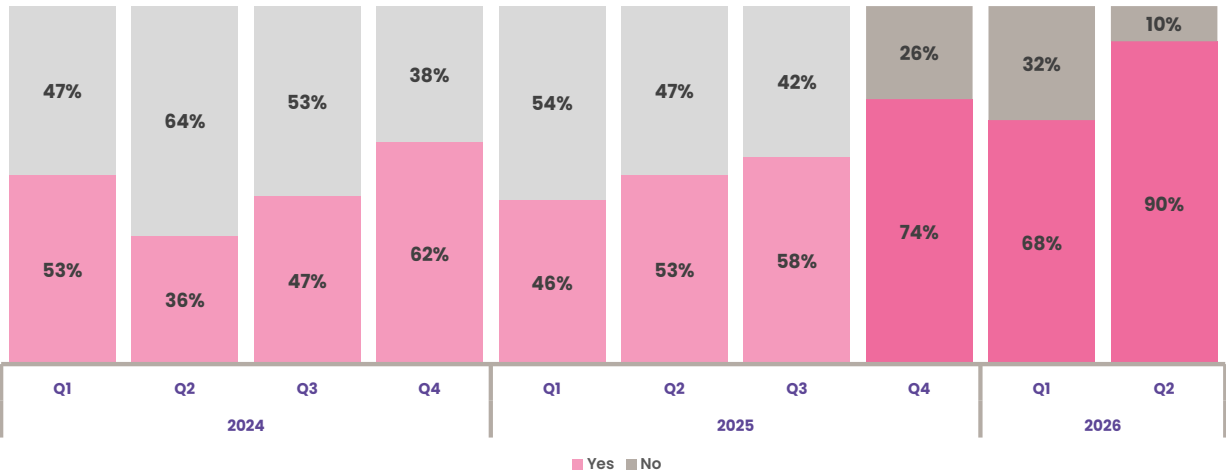


Skills shortages remain a significant barrier to growth

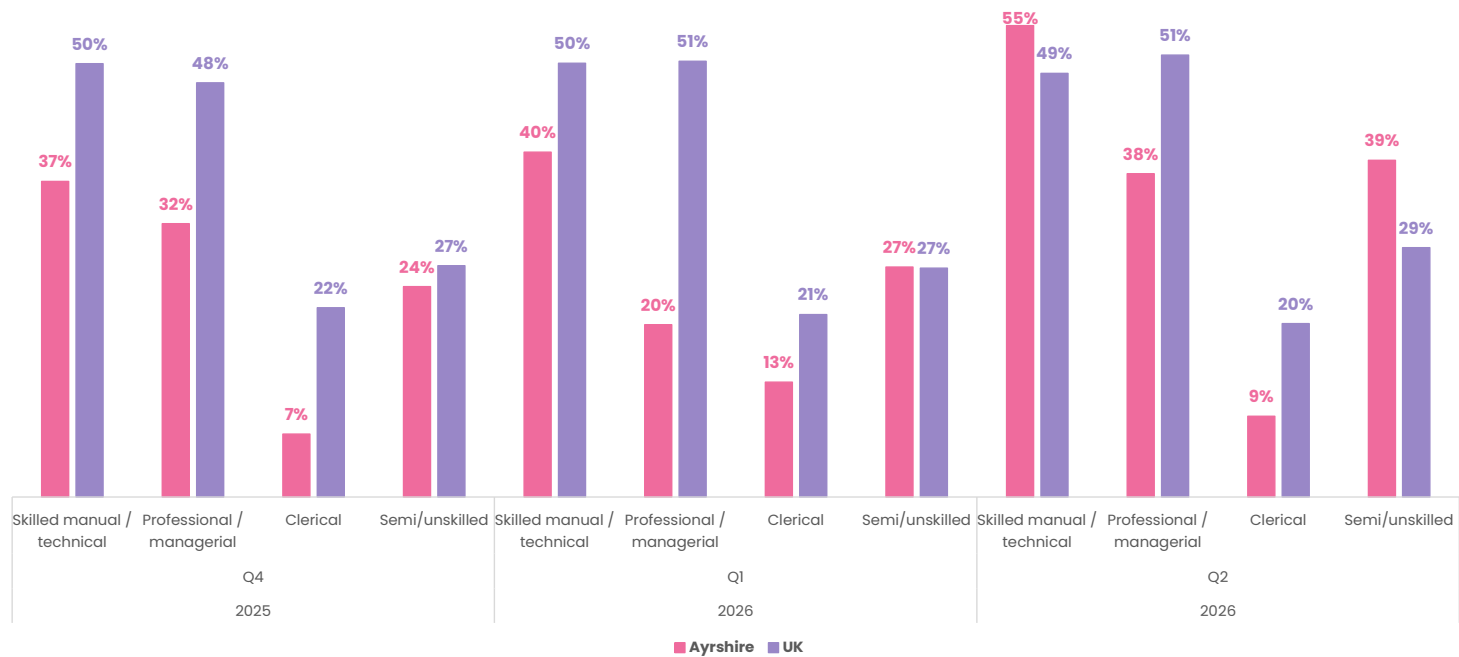
Recruitment challenges remain acute across Ayrshire, with 90% of businesses attempting to recruit reporting difficulties in finding suitable candidates. Skilled manual and technical roles were the most difficult to fill, cited by 55% of employers experiencing recruitment challenges, followed by semi-skilled roles (39%) and professional or managerial positions (38%).

While businesses continue to recruit despite economic uncertainty, the findings reinforce concerns that persistent skills shortages are limiting growth and placing additional pressure on existing workforces. Compared with Q1, recruitment demand has increased, suggesting that competition for talent is likely to remain a challenge in the months ahead.

Q: If you attempted to recruit, did you experience any difficulties finding suitable staff?



	Ayrshire	UK	% point difference, region v UK
Yes	90%	73%	17%
No	10%	27%	-17%



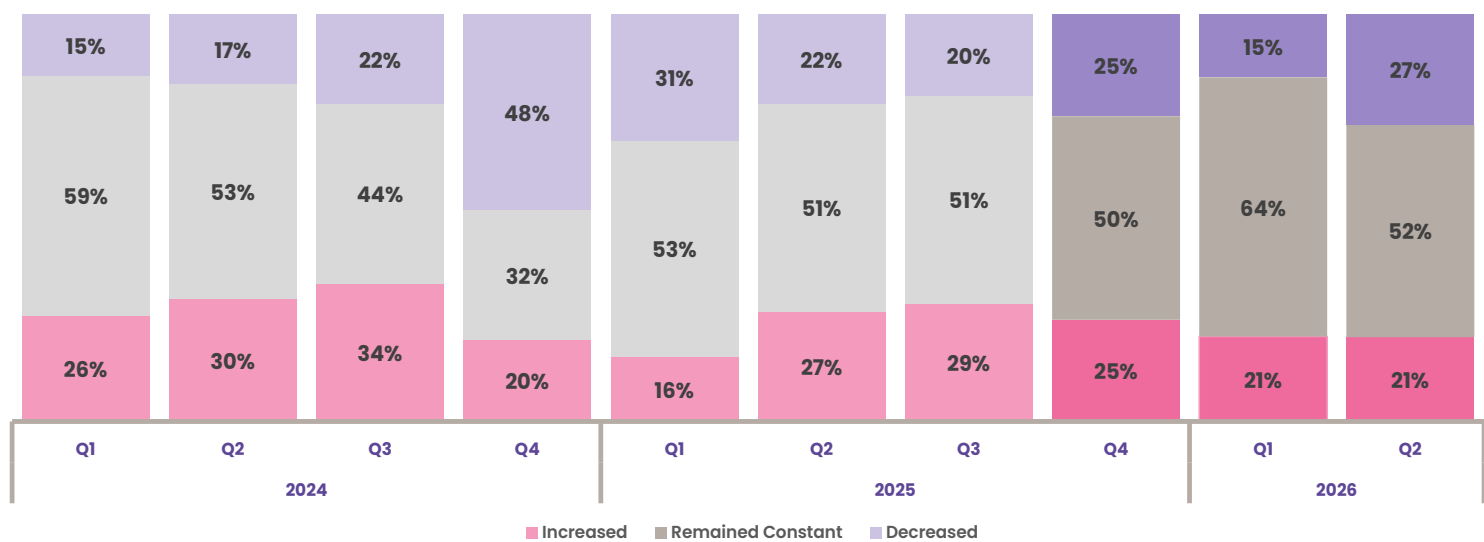
Training Investment

Training investment remains resilient despite economic pressures

Over half of Ayrshire businesses (52%) maintained investment in training during Q2, while 21% increased investment and 27% reduced it.

Compared with the UK picture, Ayrshire businesses were slightly more likely to increase training investment (21% vs 20%) but also more likely to reduce it (27% vs 20%). This suggests a more polarised picture locally, with some businesses continuing to invest in workforce development to address skills shortages, while others scale back training expenditure in response to cost pressures and economic uncertainty.

Q: Over the past 3 months, investment plans for training have..



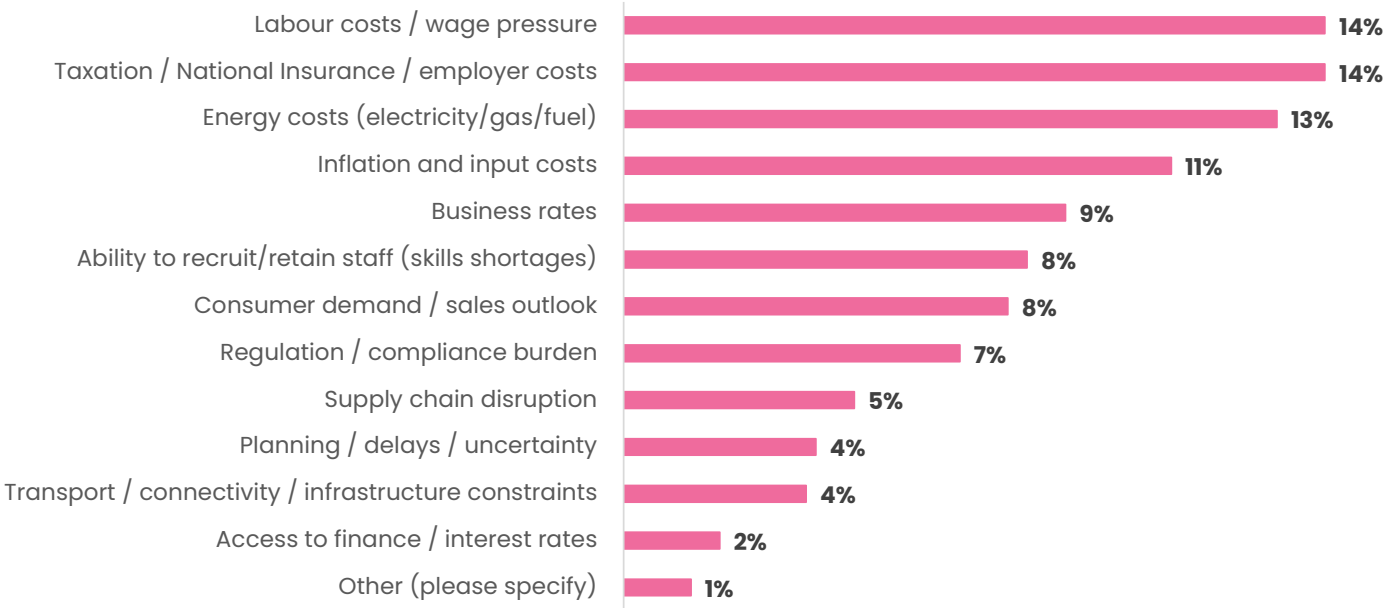
	Ayrshire	UK	% point difference, region v UK
Increased	21%	20%	1%
Remained Constant	52%	60%	-8%
Decreased	27%	20%	7%

Regional Focus: Where businesses believe policy and reality diverge

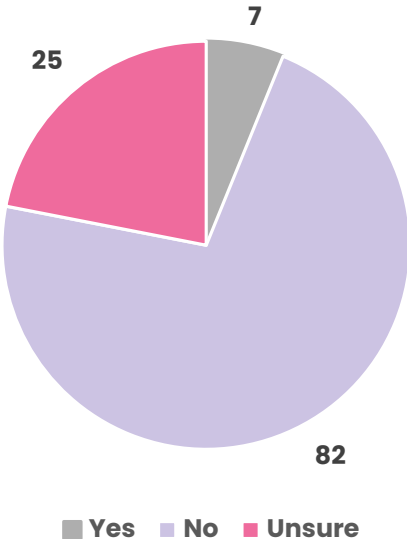
Regional Findings: Policy Confidence, Cost Pressure and the Ayrshire Business Reality

The regional responses add depth to the survey data by showing where businesses feel policy is furthest from day-to-day commercial reality. Their comments fall into three clear themes: Costs & Competitiveness, Skills & Workforce, and Delivery, Infrastructure & Growth. These themes mirror the issues already highlighted in the QES results and provide a practical framework for understanding the barriers businesses want addressed.

Q: Following the election, which issues are you most concerned about for your business over the next 3–6 months?



Q: Do businesses believe the Scottish Government understands the needs of businesses in Ayrshire following the election?



Business Voice

What is the single biggest area where Scottish Government policy does not reflect business reality in Ayrshire right now?

Costs and Competitiveness

"Business rates are unrealistic in keeping SME in business and so many have now closed as a result." **Business in the Consumer Services Sector**

"The gap between policy ambition and trading reality is now showing up in the combined pressure of rising wage costs, rising business rates and energy costs, staff shortages and complex regulation. Most businesses are already operating on very tight margins." **Business from the Retail and Wholesale Sector**

Skills and Workforce

"The biggest gap between Scottish Government policy and business reality in Ayrshire is the underestimation of cost pressures on small employers." **Business in the Bridal Retail & Customer Services Sector**

Delivery, Infrastructure and Growth

"Project delay, red tape and grants that are not inflation linked." **Consultancy Business**

"Ferry services and infrastructure." **Business from the Hospitality and Tourism Sector**

"They do not seem aligned and able to communicate effectively with businesses unless they are larger employers." **Business from the HR Sector**

The qualitative feedback reinforces a clear message: Ayrshire businesses are not lacking ambition, but they are operating under sustained pressure. Rising costs, workforce challenges and delays in delivery are affecting confidence, profitability and investment decisions. The message from businesses is practical and consistent — reduce cost pressures, strengthen local skills pipelines, improve delivery, and engage more directly with the realities facing firms across Ayrshire.

If you could ask the Scottish Government to do one thing in the next 100 days to support Ayrshire businesses, what would it be?

Top key findings:

Costs and Competitiveness

- Reduce, freeze or reform business rates
- Lower the tax burden on employers and SMEs
- Provide targeted support with energy costs

Skills and Workforce

- Improve apprenticeship and skills support
- Engage directly with Ayrshire businesses before designing policy

Delivery, Infrastructure and Growth

- Speed up planning, funding and project approvals
- Improve transport connectivity, including ferries and roads

Hospitality, tourism and accommodation

"Repair the Irish berth at Ardrossan so MV Alfred can sail there again."

"Introduce an immediate review and temporary freeze on business rates increases for hospitality, tourism and accommodation businesses."

Manufacturing and engineering

"Get out, visit businesses and listen first to those that know the landscape best before policy creation. Less talking, more action and active backing."

"Rapid grants with a 30-day decision guarantee for capital investment, hiring/apprenticeships, automation upgrades."

Construction, property and infrastructure-related firms

"Fast track planning, warrant and funding for social housing and other related projects."

Retail and high street businesses

"Before introducing new business costs or compliance, prove that a typical independent business in Ayrshire could realistically remain profitable."

Public, voluntary and social economy organisations

"Deliver immediate business rates relief and targeted skills and infrastructure investment to unlock growth, improve connectivity, and help Ayrshire firms compete, recruit, and scale sustainably."

"Create powers to unblock projects in real time - not another strategy, not another consultation but a delivery mechanism that works for Ayrshire."

National Viewpoint

David Bharier, Head of Research at the British Chambers of Commerce, said:

"The continued fall in SME investment sentiment is further evidence of a longer-term pattern that no single shock explains.

Our data shows a risk-aversion cycle taking hold. Firms have not lost ambition, but years of compounding cost pressures and geopolitical shocks have produced defensive behaviour for the average SME.

Most firms are now experiencing policy as downside risk rather than opportunity – with the rise in employer NICs a prominent example, still being felt almost two years on. Reducing the cost and complexity of the administrative burden would give many firms the space to grow.

But more broadly, government policy needs to pass a 'growth delivery test'. Each proposal should start from the question of exactly how it will cause firms to increase investment, exports, hiring, or expansion. Until that test is being applied, more announcements will produce fewer decisions—and our survey will continue to show the same pattern quarter after quarter."



Ayrshire Chamber Viewpoint

Claire Baird, Chief Executive Officer at the Ayrshire Chamber of

Q2 presents a more challenging picture for Ayrshire's economy than the cautious confidence we saw at the start of the year. While many businesses continue to show resilience, they are doing so against a backdrop of ongoing economic uncertainty, global volatility and persistent cost pressures. Within this context, the data suggests that momentum has softened across several key indicators.

Domestic sales and orders have become more subdued, with a greater proportion of firms reporting stability rather than growth, and confidence around both turnover and profitability has weakened since the previous quarter. In particular, profitability expectations have moved sharply in the wrong direction, with 45% of Ayrshire businesses now expecting profitability to worsen over the next 12 months, compared with 29% in Q1.

This is not a story of businesses standing still through lack of ambition; it is a reflection of the cumulative pressures they are carrying. Cost remains the dominant theme. Labour costs continue to affect 72% of respondents, while utilities have increased as a source of pressure, rising from 59% in Q1 to 71% in Q2. Inflation, taxation and business rates also remain prominent concerns, with inflation now cited by 68% of respondents as a greater concern than three months ago, up from 53% in Q1.

There are still signs of underlying stability. Most businesses expect prices to remain unchanged over the next quarter and many continue to hold workforce levels steady. However, the labour market data points to a more cautious outlook: fewer firms expect to increase their workforce than in Q1, while recruitment activity has risen and 90% of those attempting to recruit report difficulties finding suitable staff. This reinforces what we continue to hear from members — that skills, wage pressure and the cost of employment are now central constraints on growth.

The regional findings send a particularly clear message. Following the election, businesses are looking for practical delivery, not further strategy without action.

Their immediate concerns are taxation and employer costs, labour costs, energy costs, inflation and business rates. When asked what would most help them invest and grow in Ayrshire, the strongest responses were lower or more predictable business rates, tax incentives or reliefs for growth, and support to reduce energy costs.

Most significantly, 72% of respondents do not believe the Scottish Government understands the needs of businesses in Ayrshire, compared with 66% in Q1. That should be a serious concern for policymakers.

The qualitative responses show a strong perception that policy is not keeping pace with commercial reality, particularly for SMEs and key sectors including hospitality, manufacturing, retail, construction and rural and island businesses facing additional pressures around transport, ferries, planning, procurement and infrastructure.

Ayrshire businesses are not asking for special treatment; they are asking for policy that recognises the reality of operating here.

They want lower and more predictable cost burdens, faster planning and delivery, better support for skills and apprenticeships, more responsive procurement, improved connectivity and a stronger commitment to regional economic growth.

The message from Q2 is clear: resilience remains, but confidence is fragile. If government wants businesses to invest, recruit and grow, it must create the conditions that make those decisions viable.

Ayrshire's business community has continued to adapt through difficult conditions, but adaptation alone cannot drive sustainable growth.

The priority now must be to move from ambition to delivery – reducing the cost of doing business, unlocking investment, and ensuring Ayrshire's voice is heard clearly in national economic decision-making.

Key Dates:

**Q3 QES runs from
17th Aug–9th Sept**

**Q4 QES runs from
9th November – 2nd December**





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