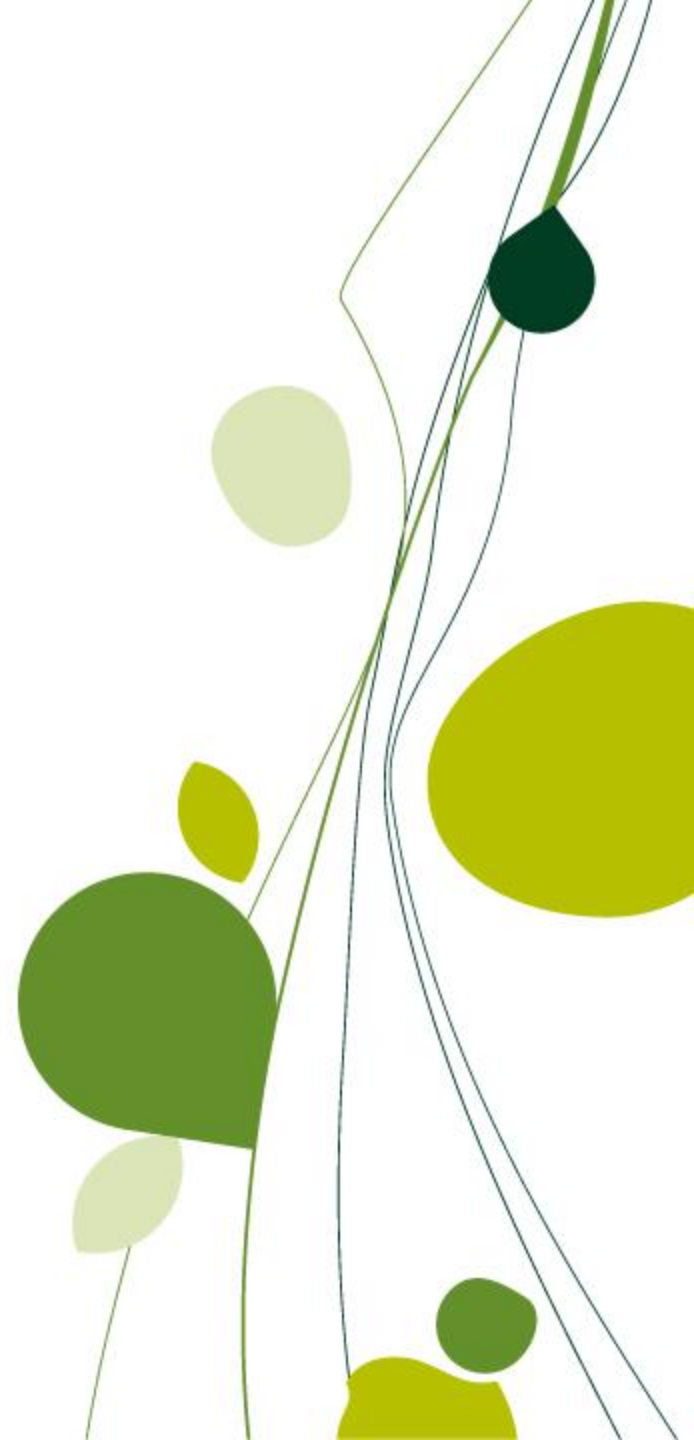




Sage Business Index Survey Findings

September 2011



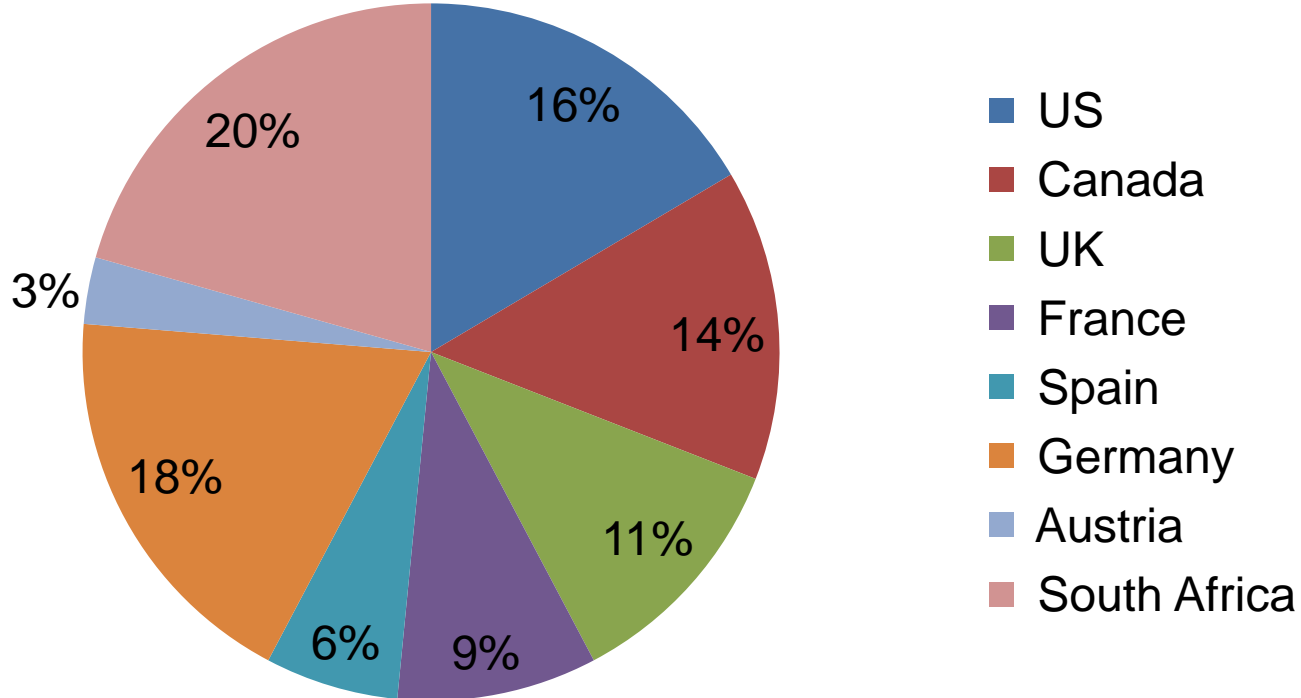
Research Sample

- Total universe: 10,006 small and medium businesses across Western Europe, North America, Africa and Asia
 - US – 1,641 (Non-Sage: 500)
 - Canada – 1351 (Non-Sage: 500)
 - UK – 1097 (Non-Sage: 500)
 - France – 921 (Non-Sage: 500)
 - Germany – 1819 (Non-Sage: 500)
 - Austria – 335
 - Spain – 614 (Non-Sage: 500)
 - Malaysia/Singapore – 202
 - South Africa – 2026 (Non-Sage: 300)
- Research conducted July/August 2011
- Research comprised responses from Sage customers and non-Sage customers (Populus SME panel)

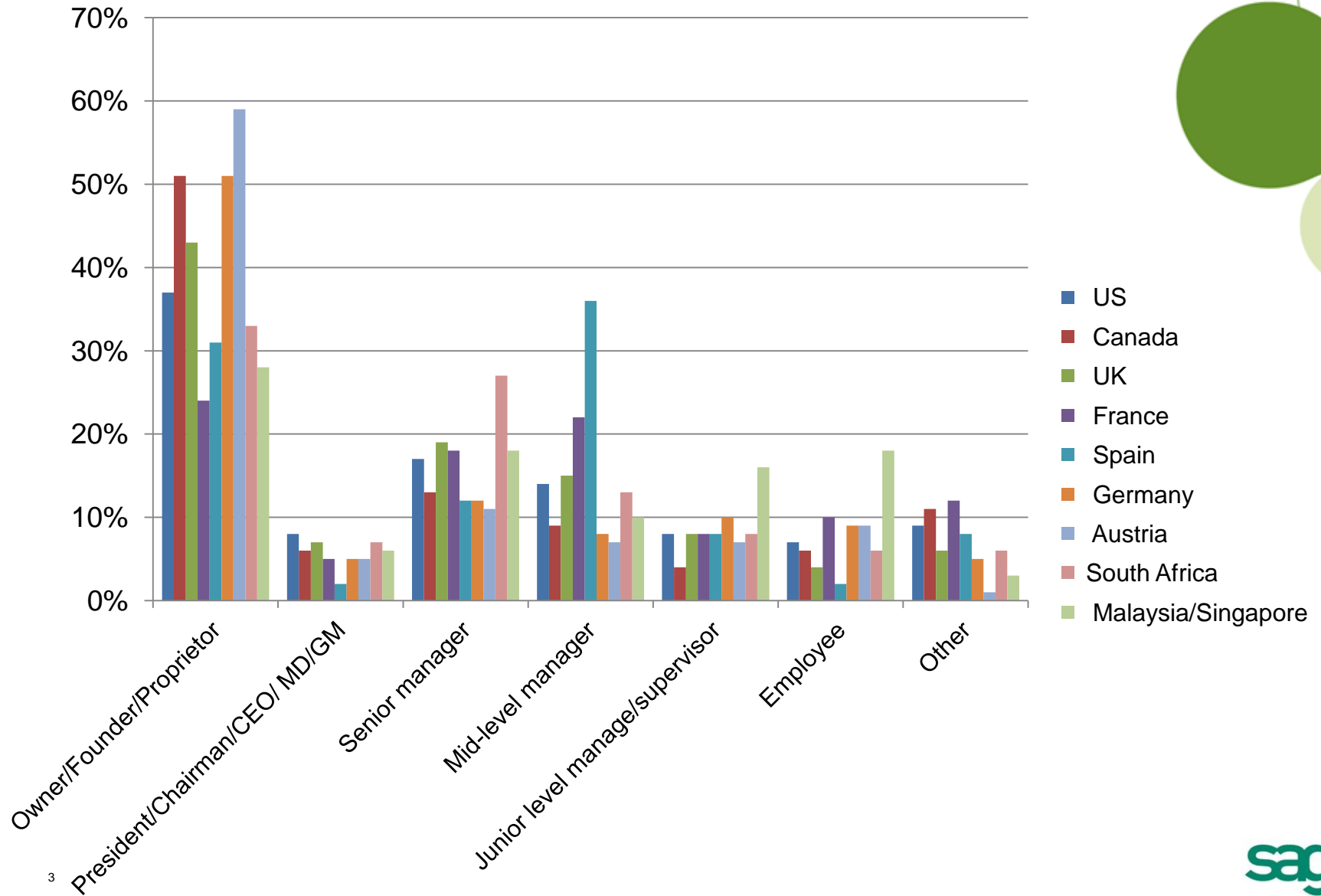


Country breakdown

Overall

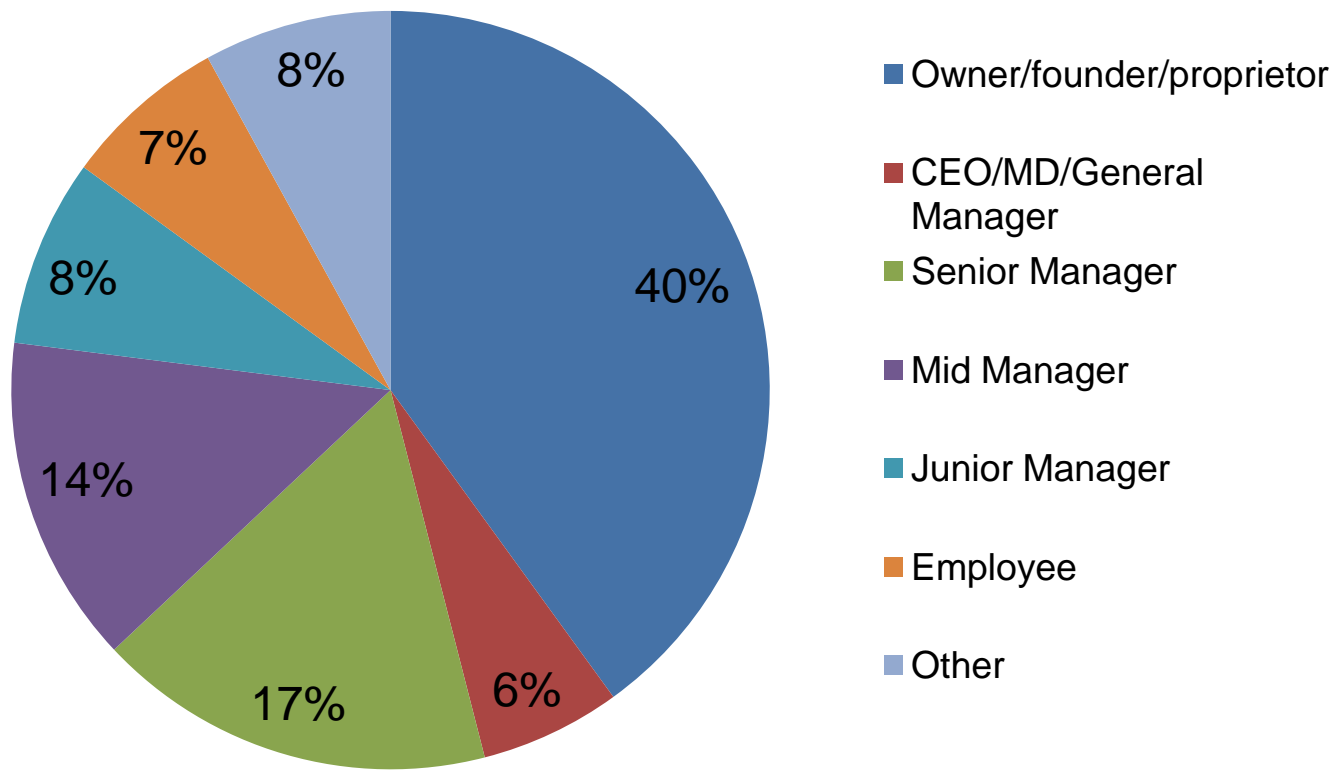


Which of the following best describes your position?

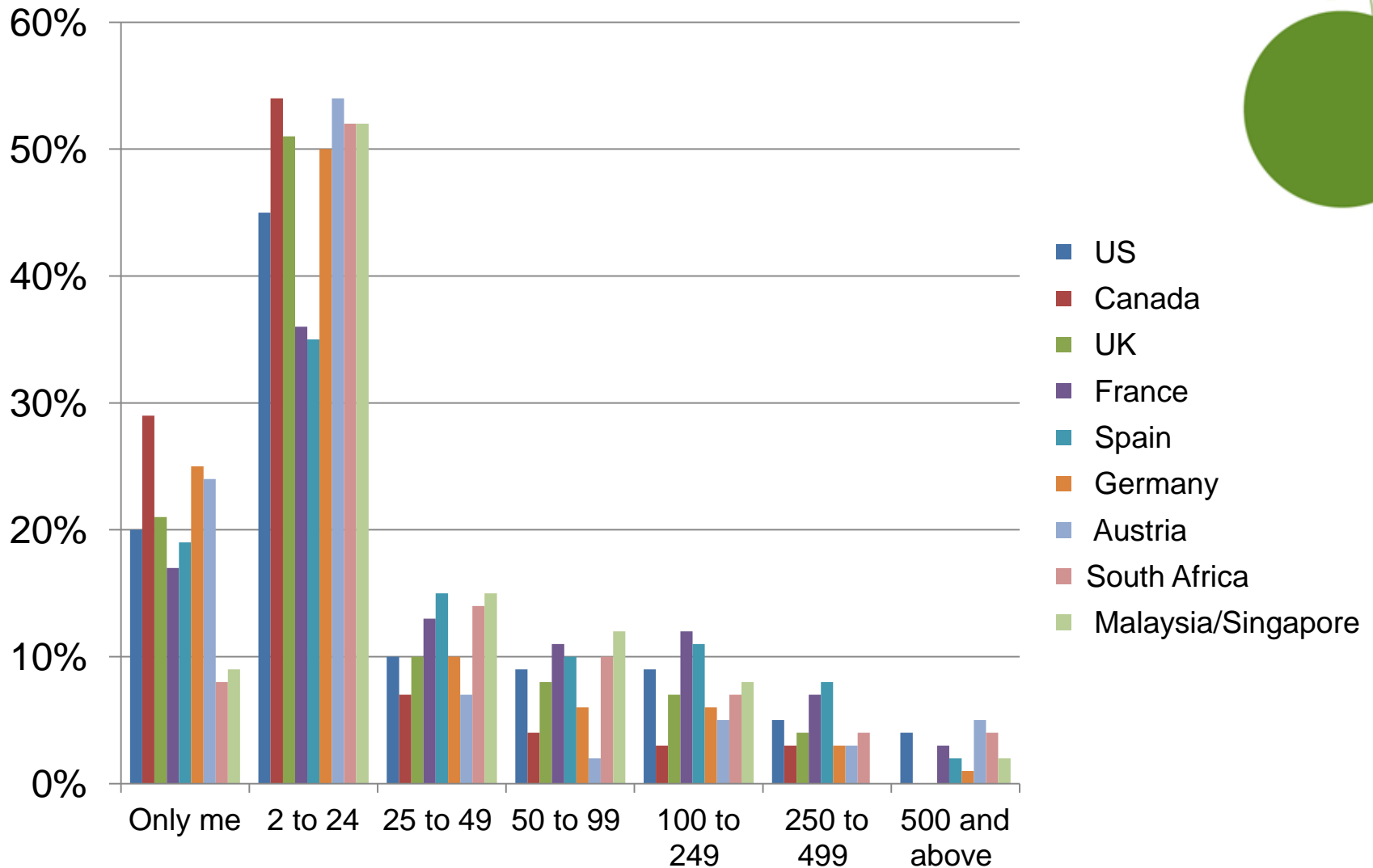


Which of the following best describes your position?

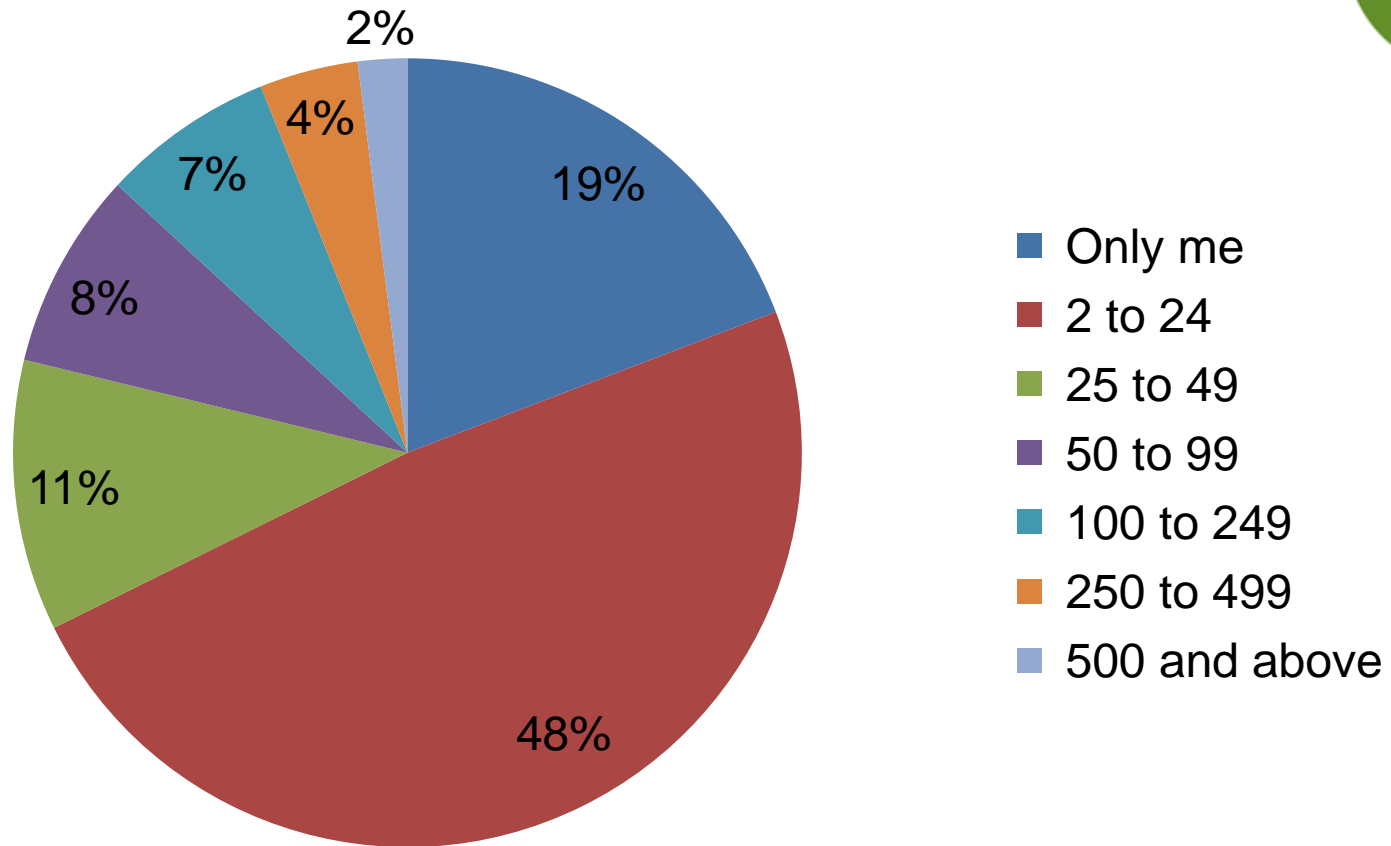
POSITION



Average size of the organisation by country

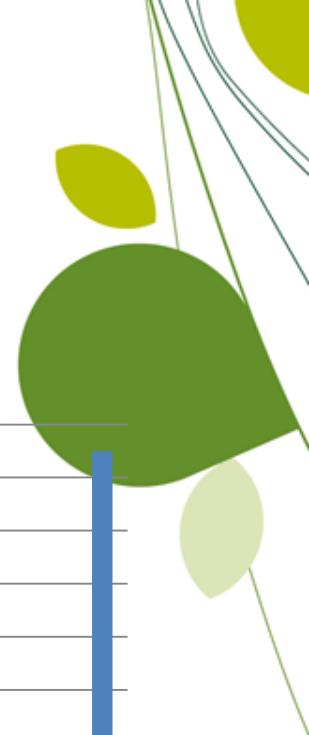
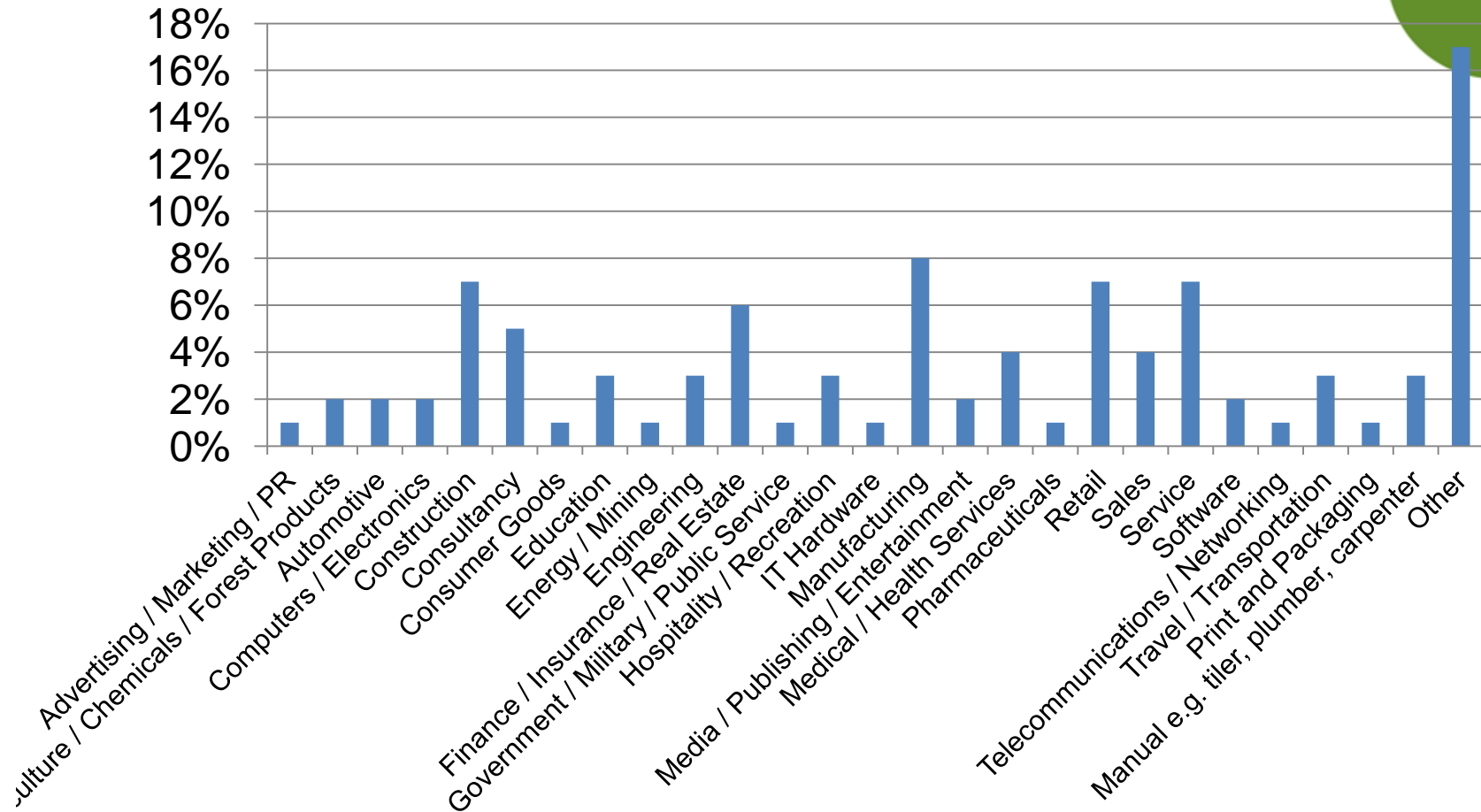


Overall average size of the organisation

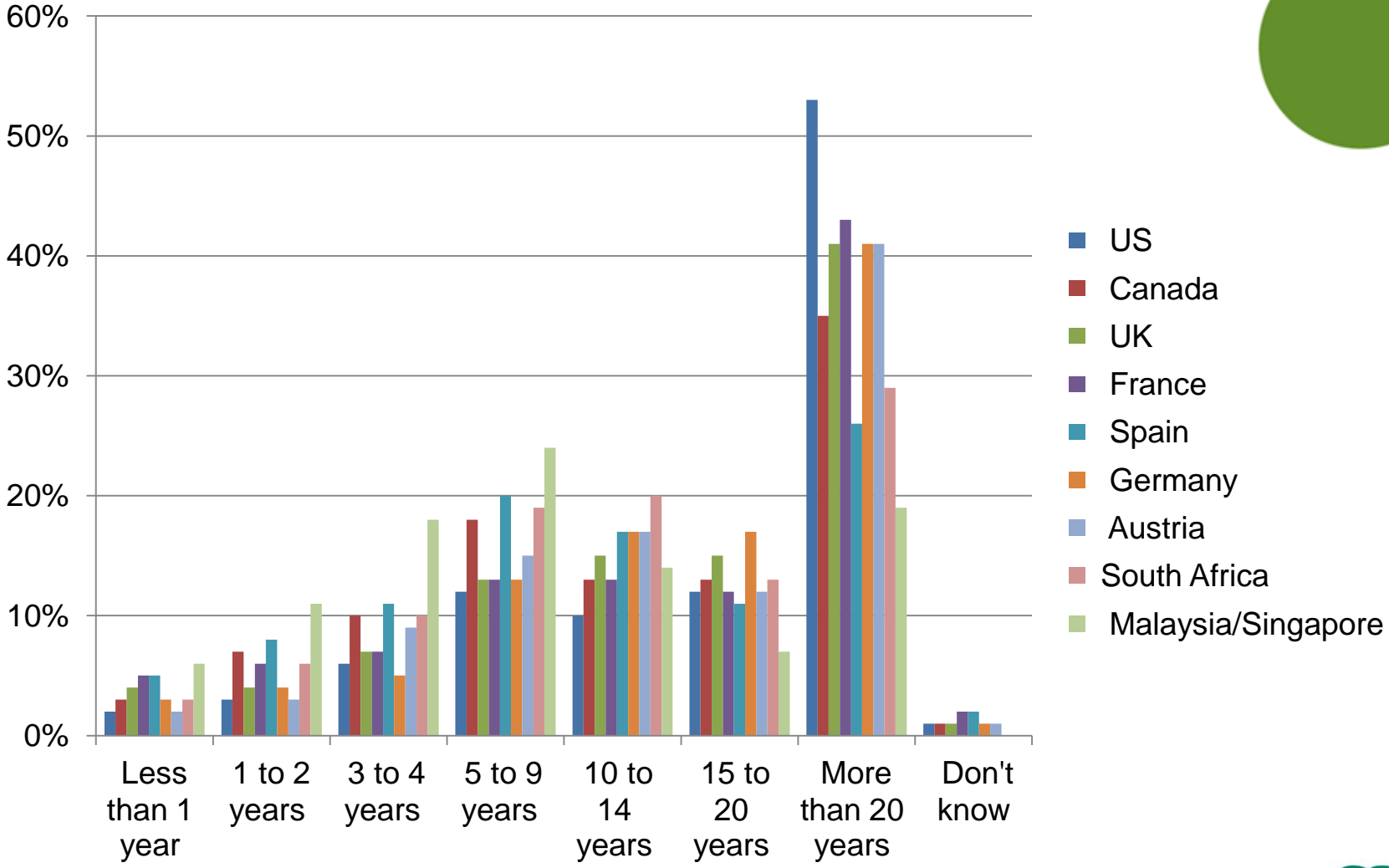


What industry does your organisation operate in?

Overall

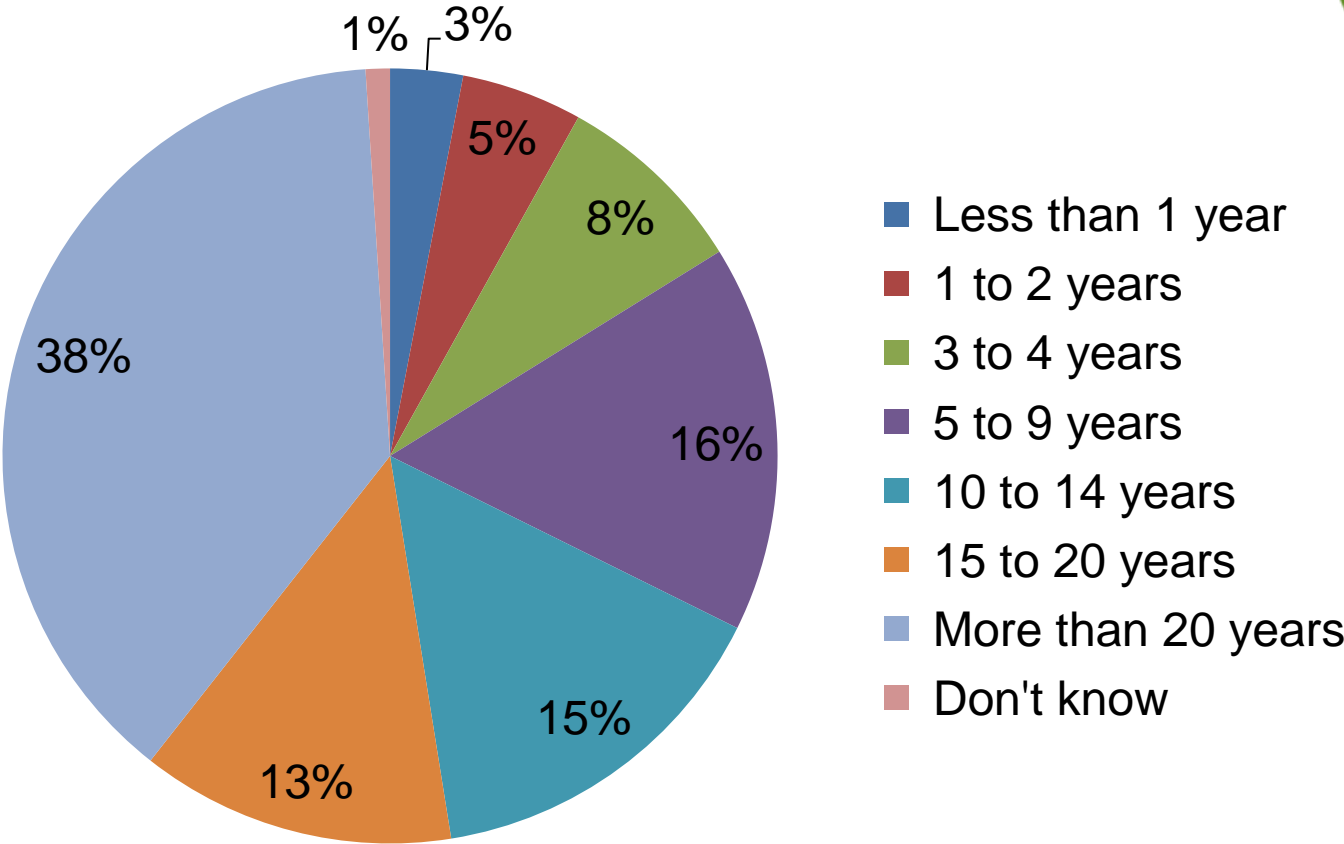


How long has your organisation been in business?



How long has your organisation been in business?

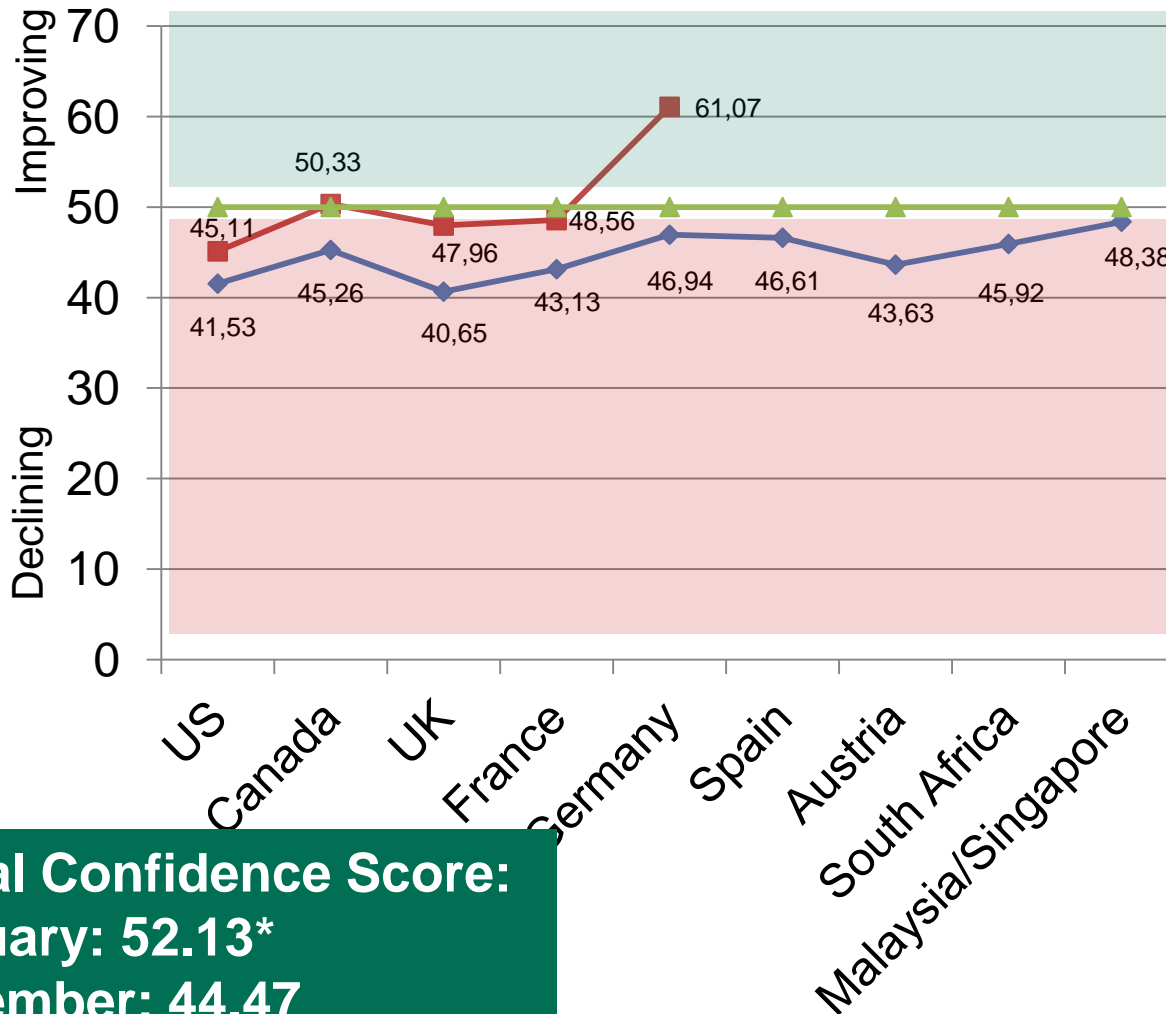
Overall





GLOBAL ECONOMIC CONFIDENCE

Compared to six months ago do you feel the global economy is now improving or declining?



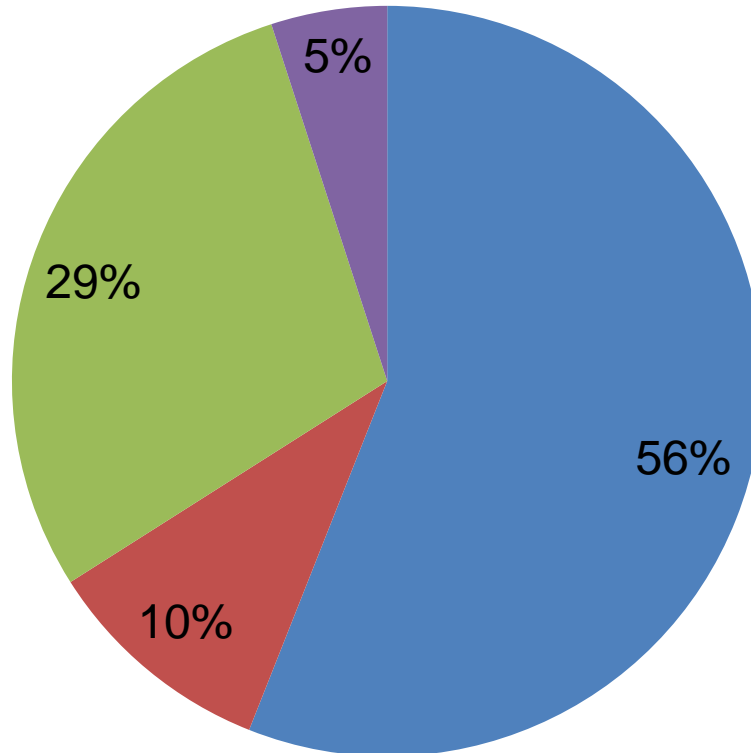
- ◆ Sep-11
- Feb-11
- ▲ No difference

* Index scores have been derived from Feb 2011 data. Answer options in this study, and their index score weighting, were: "It is recovering significantly (100)", "It is recovering slightly (75)", "It is no different (50)", "It is declining slightly (25)", "It is declining significantly (0)"

Global Confidence Score:
February: 52.13*
September: 44.47

Compared to six months ago do you feel the global economy is now improving or declining? (By overall percentage)

Overall



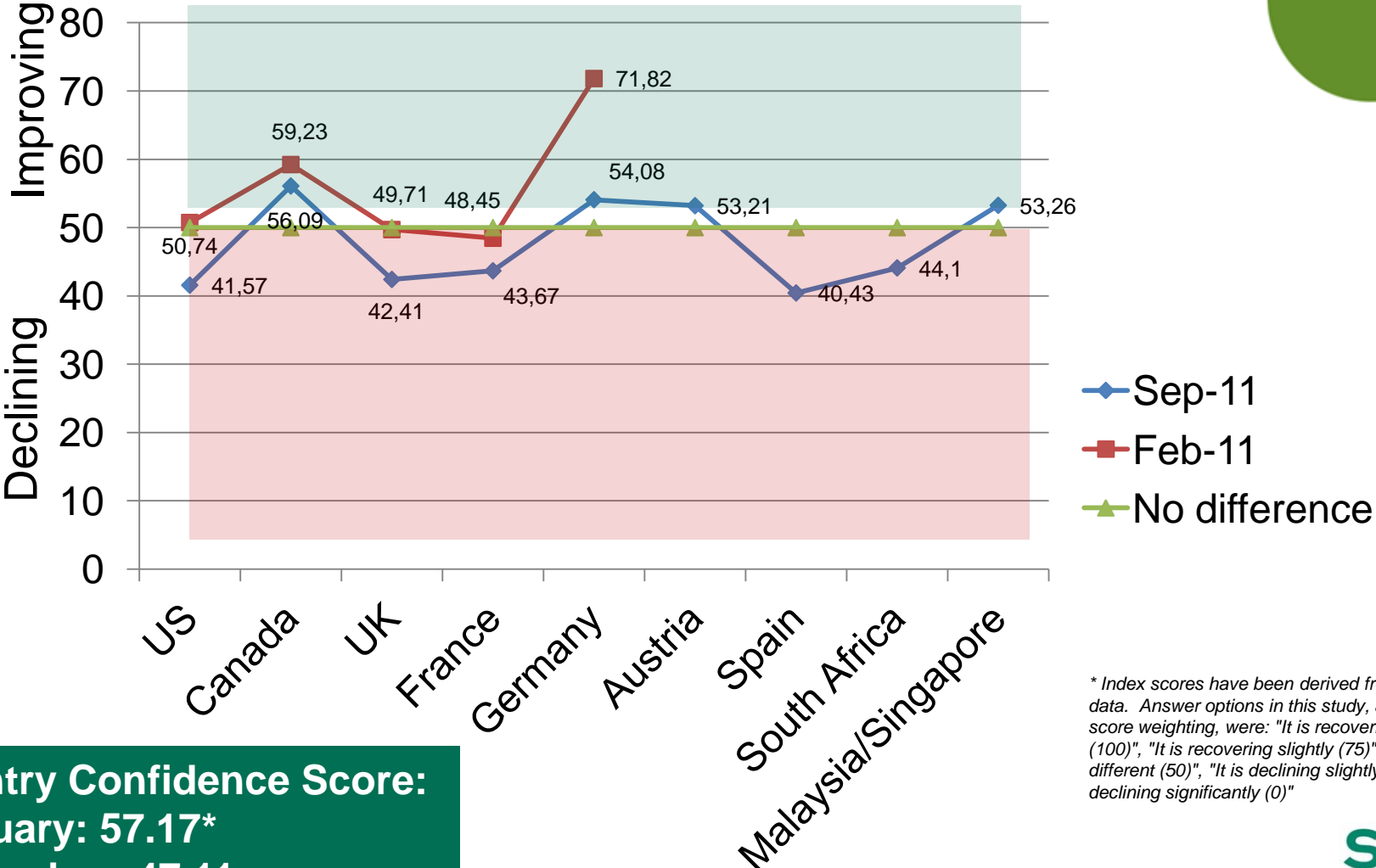
- Declining
- The same
- Improving
- Don't know





COUNTRY ECONOMIC CONFIDENCE

Compared to six months ago do you feel your country's economy is improving or declining?

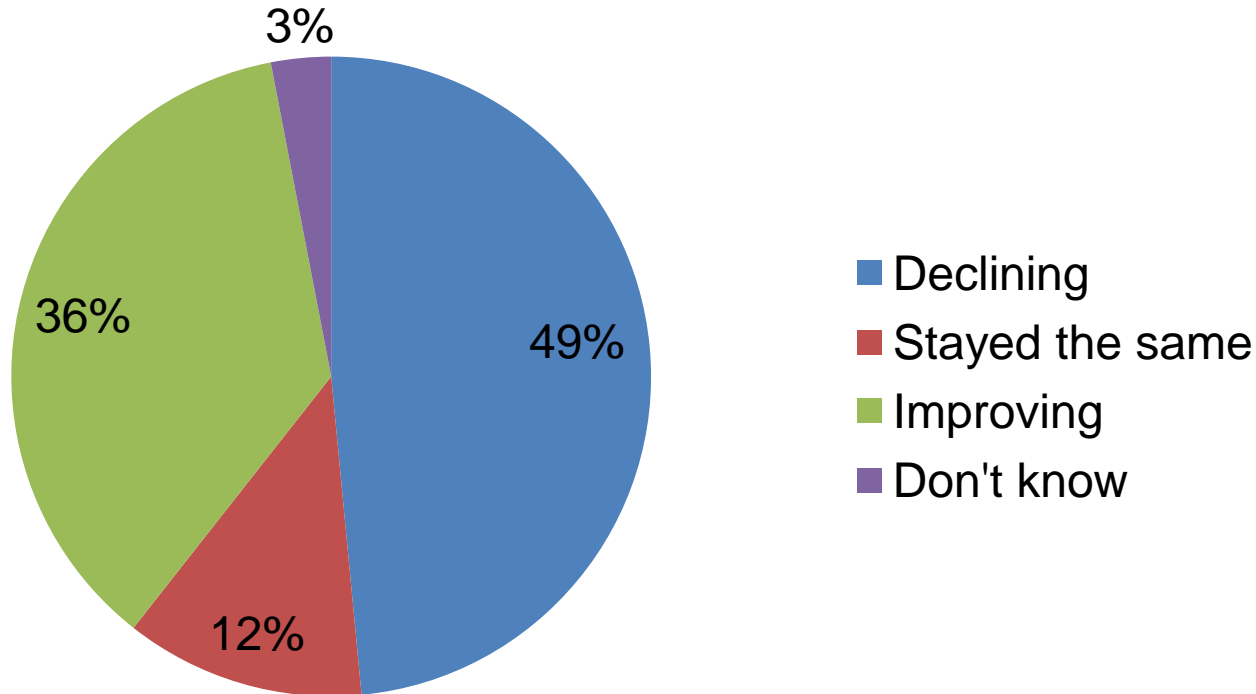


* Index scores have been derived from Feb 2011 data. Answer options in this study, and their index score weighting, were: "It is recovering significantly (100)", "It is recovering slightly (75)", "It is no different (50)", "It is declining slightly (25)", "It is declining significantly (0)"

Country Confidence Score:
 February: 57.17*
 September: 47.11

Compared to six months ago do you feel your country's economy is improving or declining? (By overall percentage)

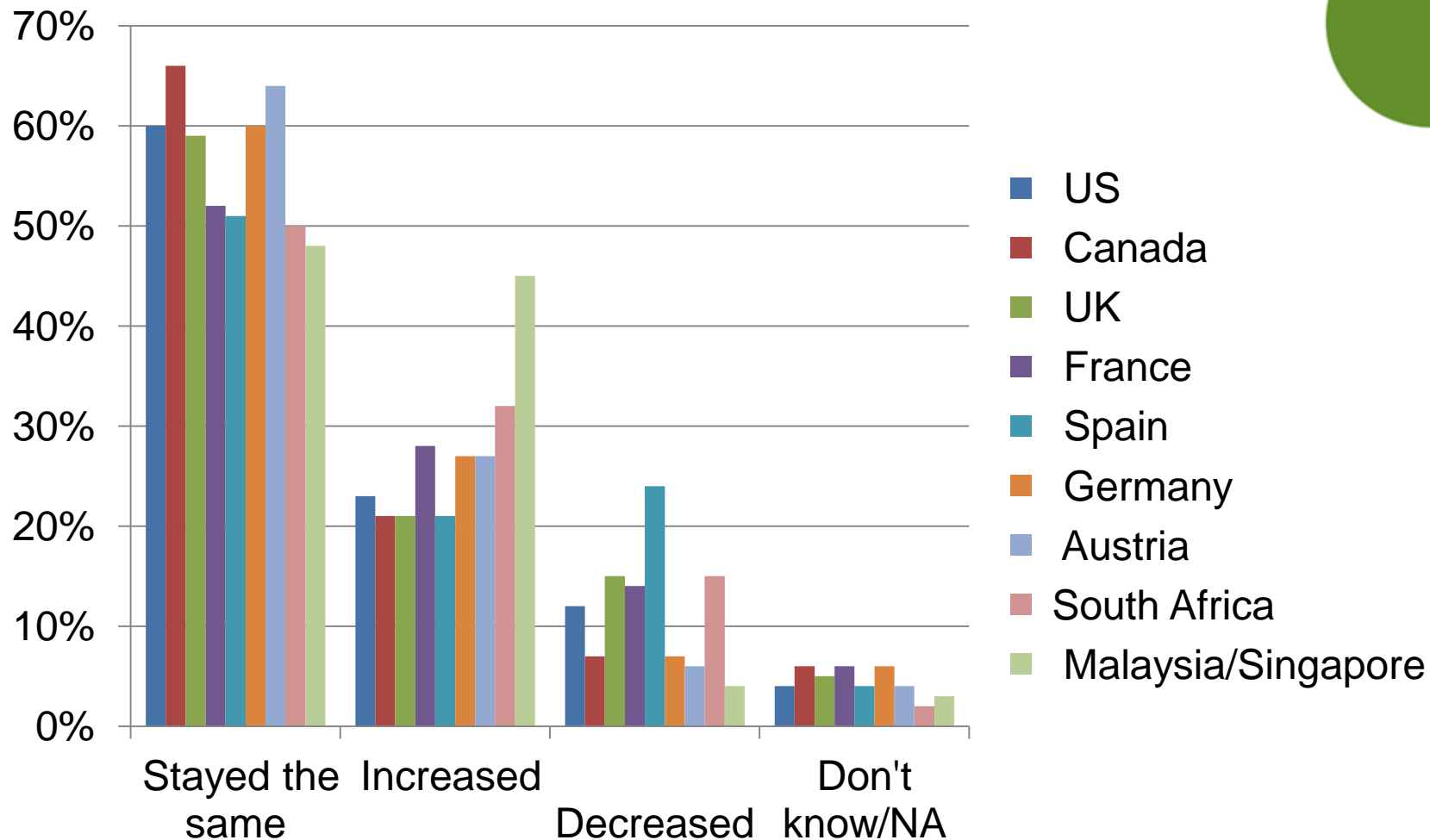
Overall





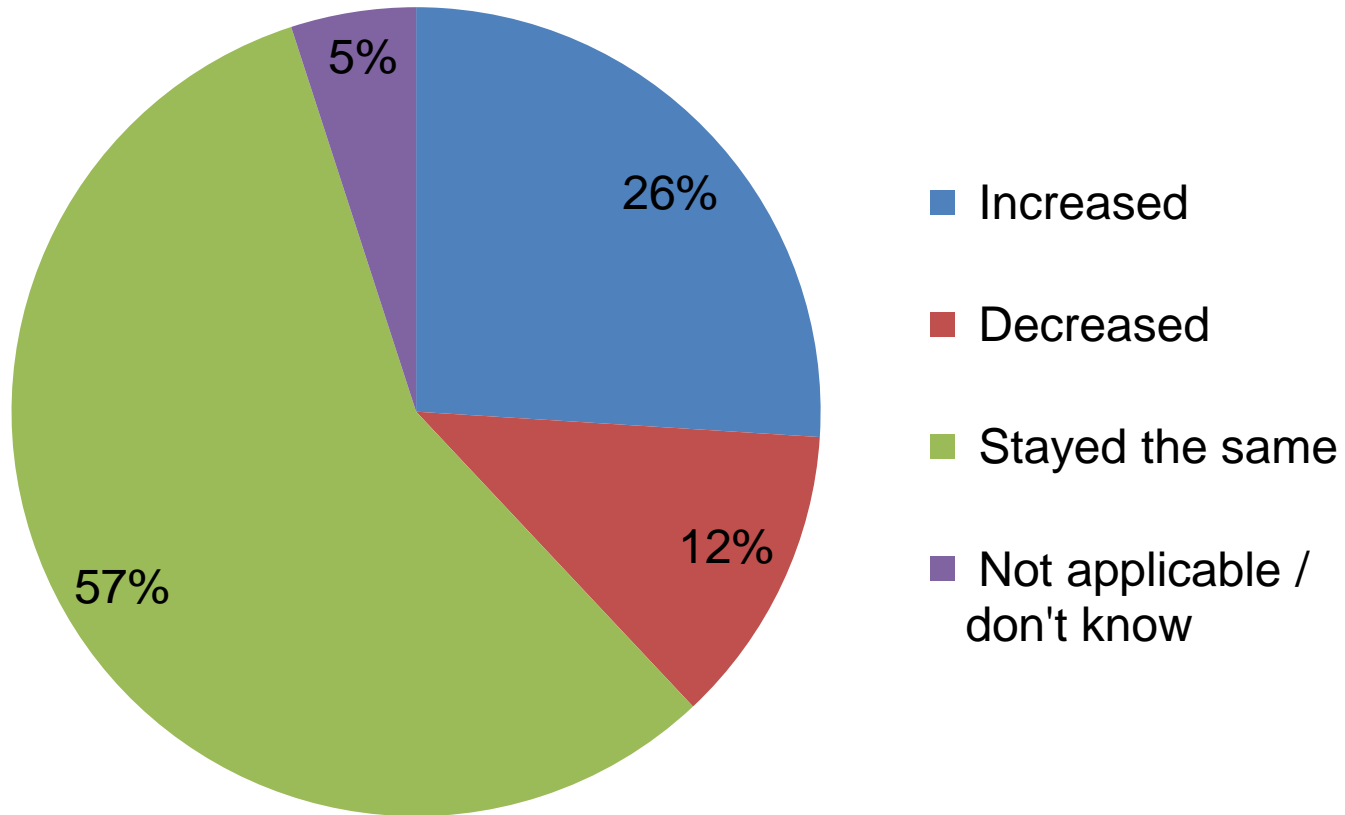
BUSINESS IN THE LAST SIX MONTHS

In the past 6 months has the number of employees at your company:

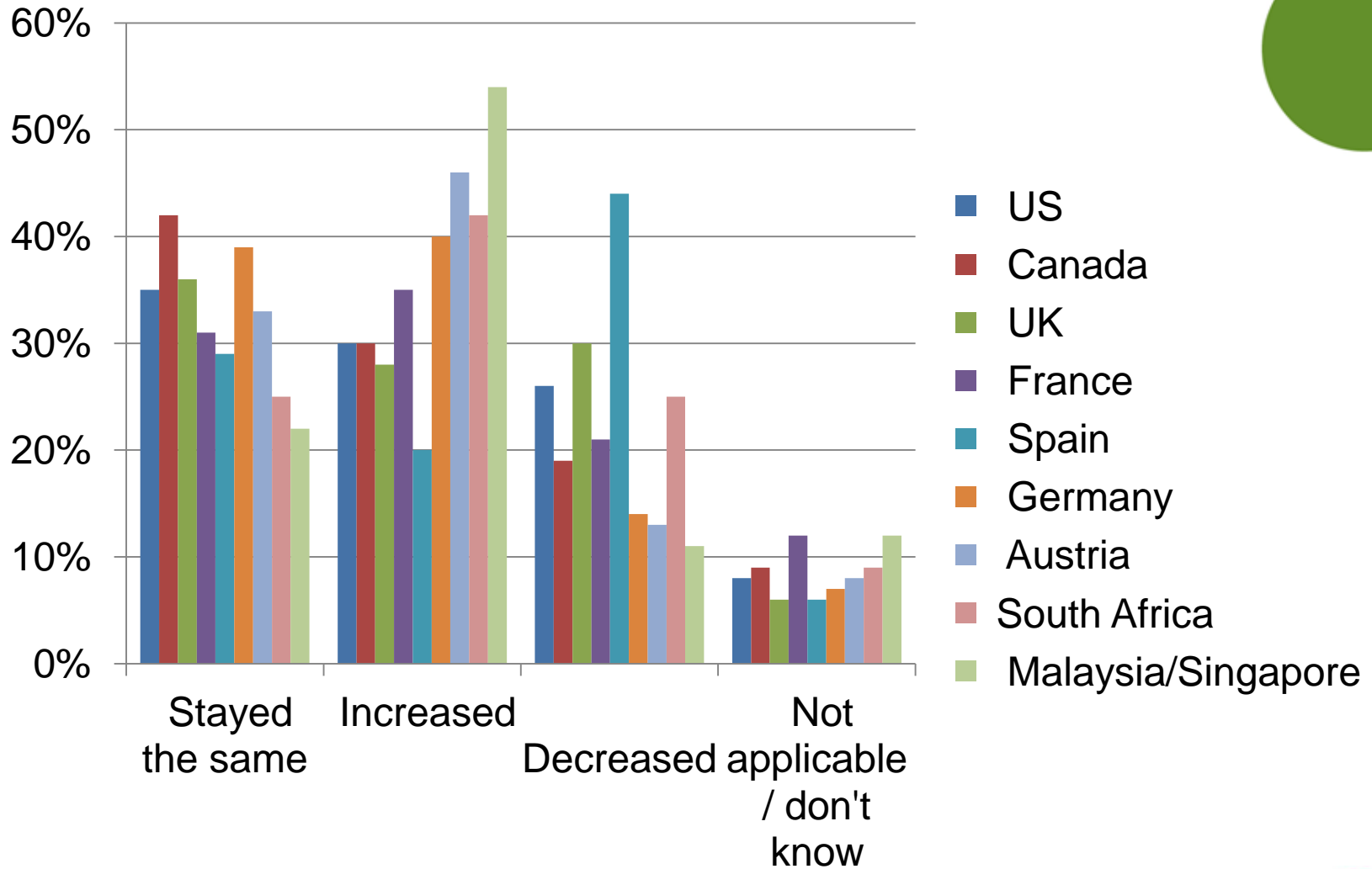


In the past 6 months has the number of employees at your company:

Overall

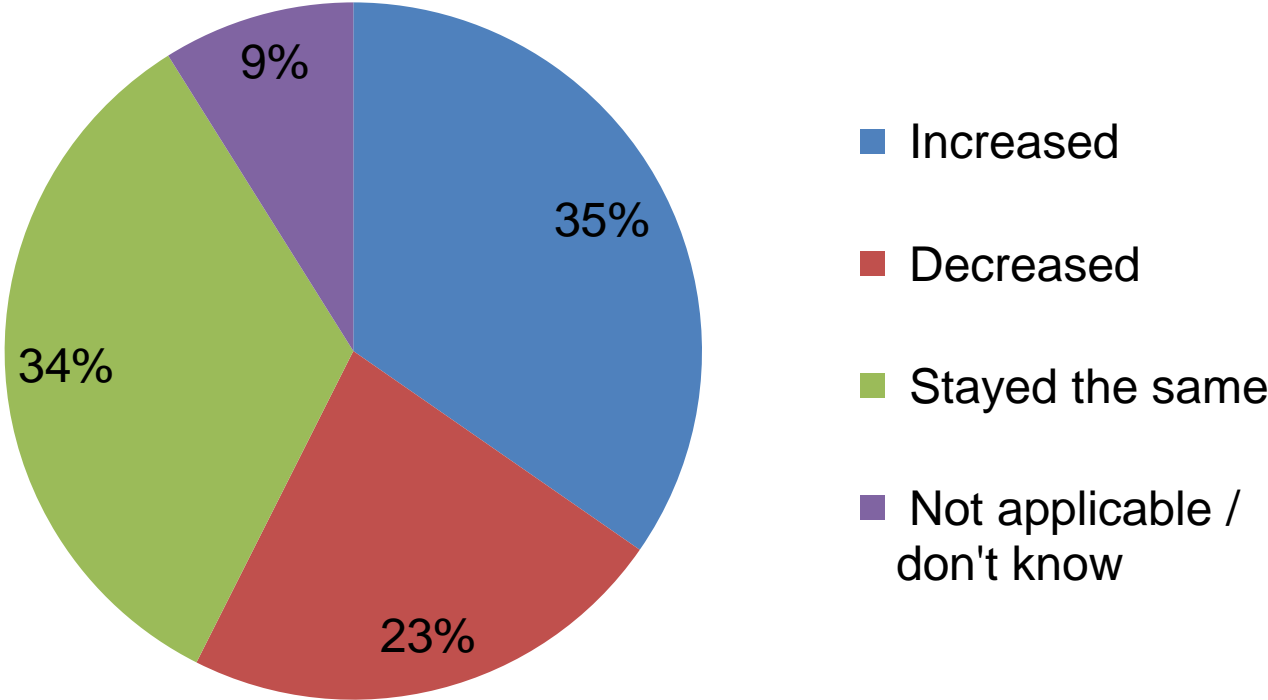


In the past 6 months has revenue:

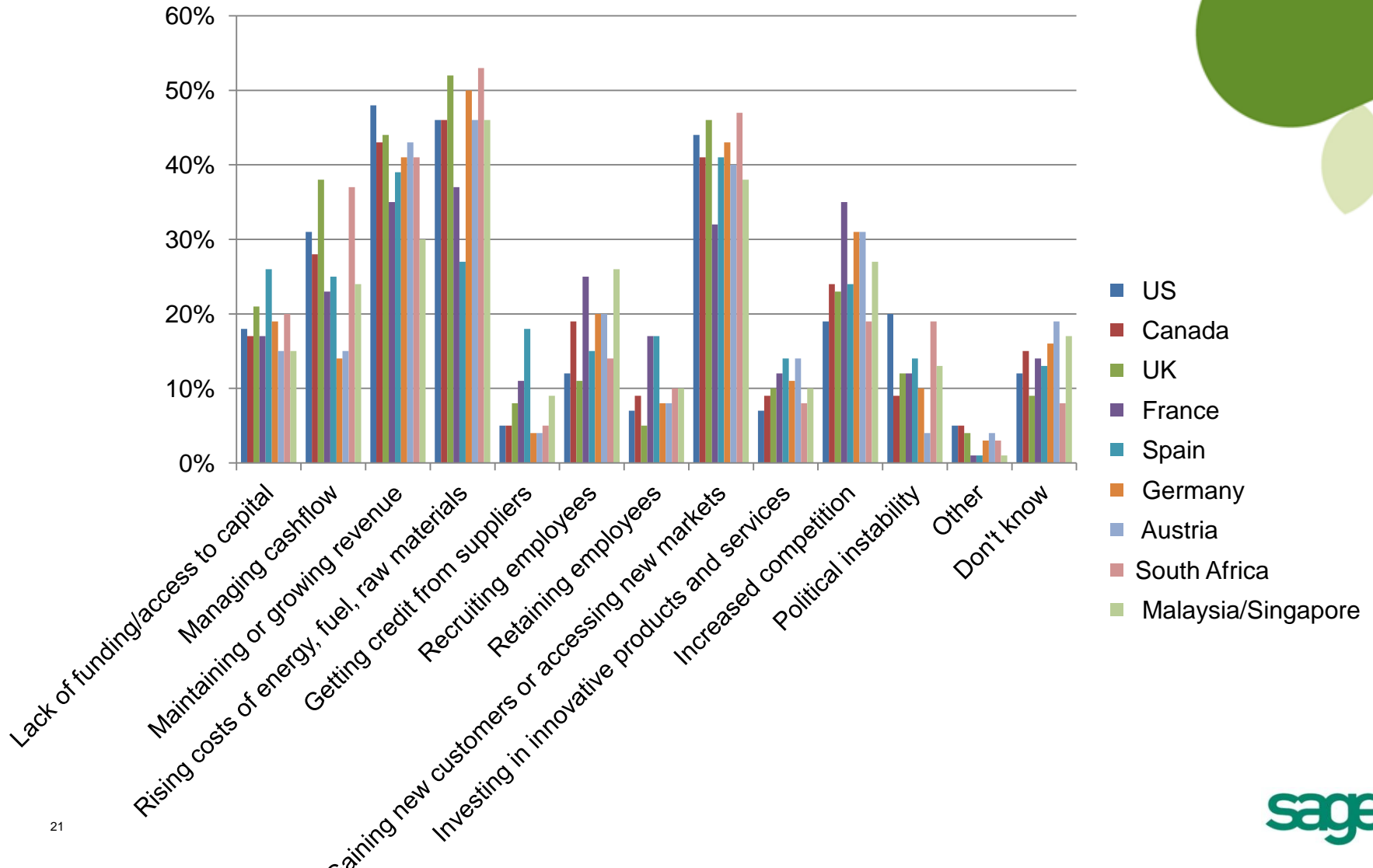


In the past 6 months has revenue:

Overall

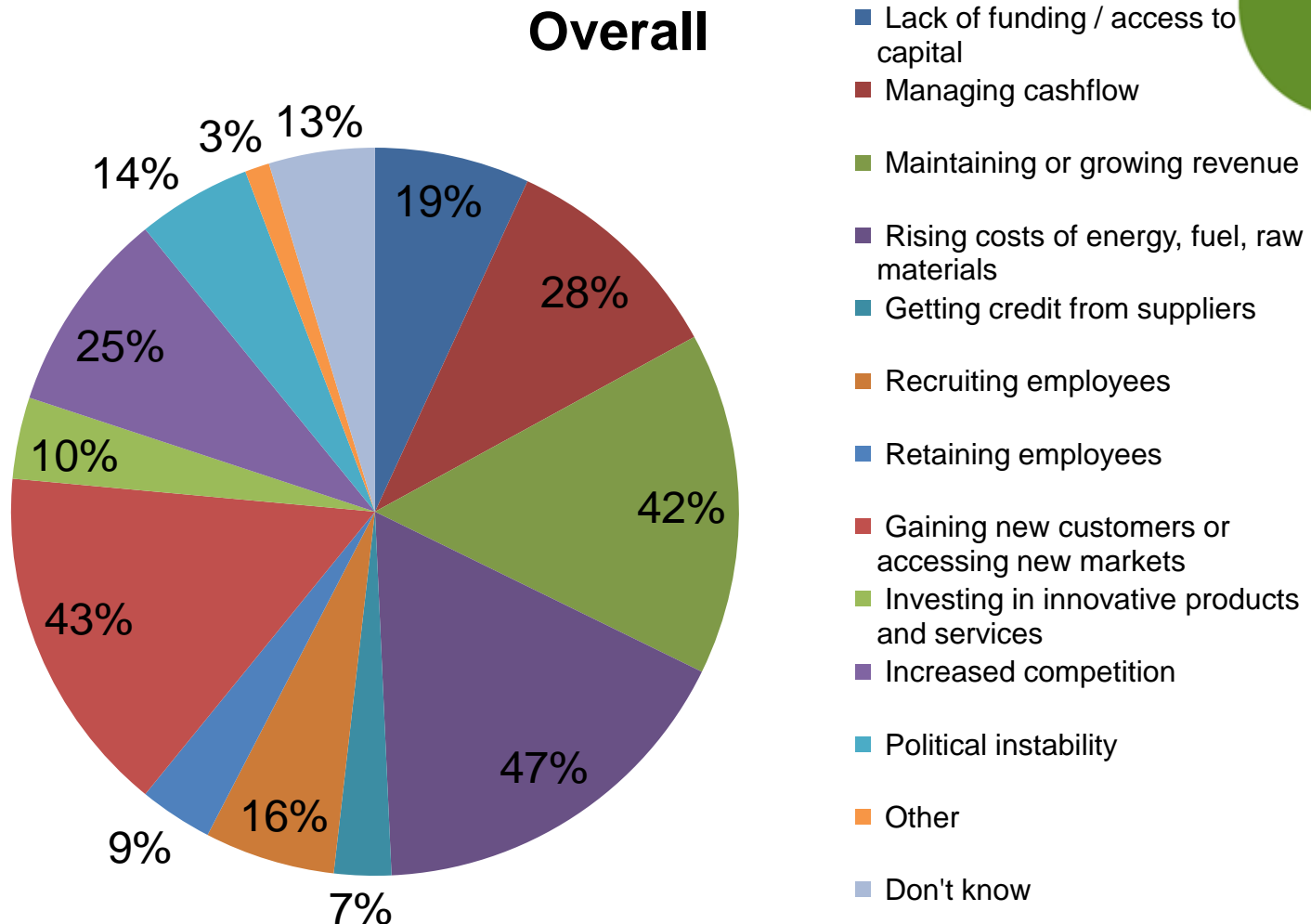


Over the past six months what have been the biggest business challenges you have faced? (Selected in top three)

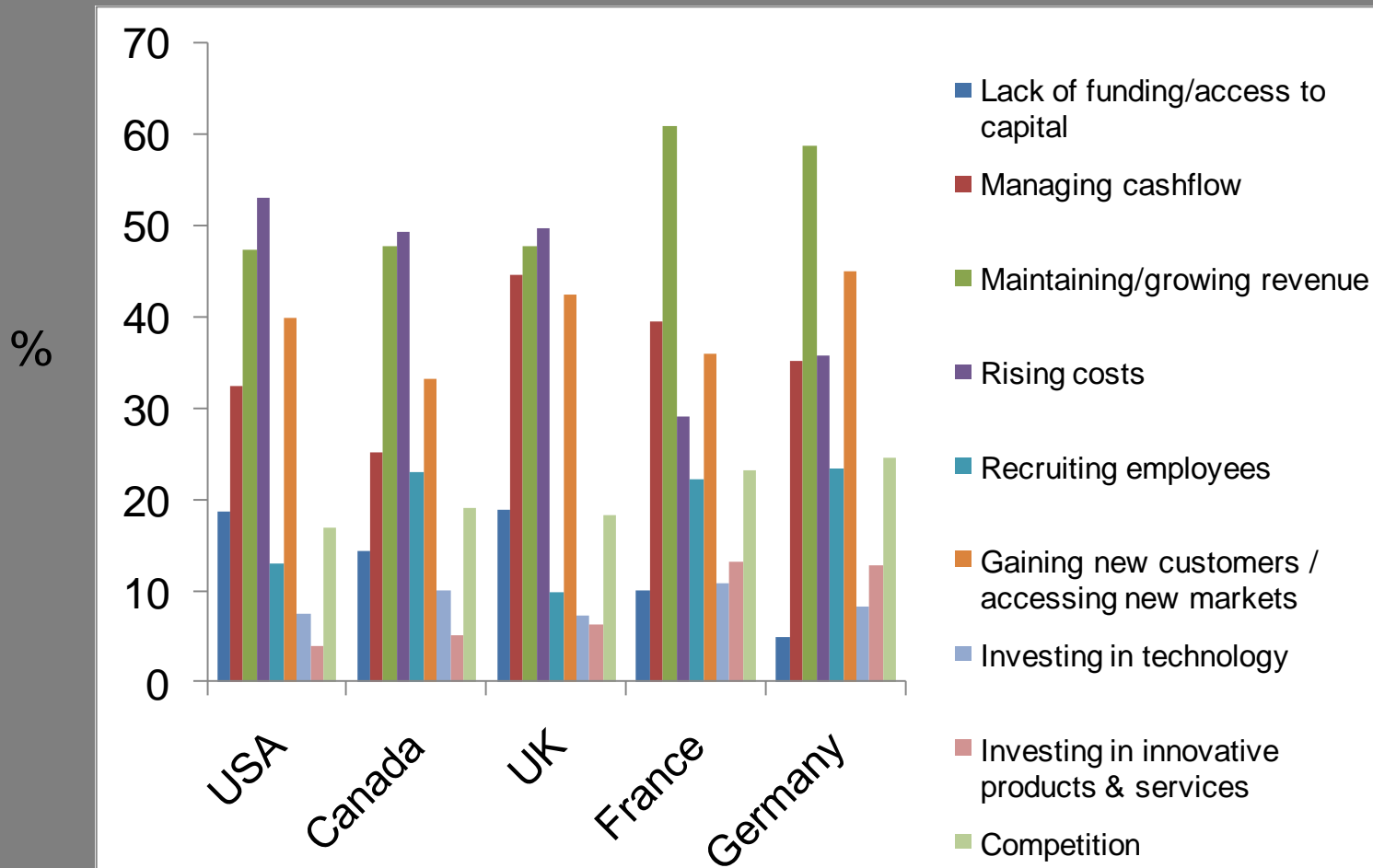


Over the past six months what have been the biggest business challenges you have faced? (Selected in top three)

Overall



2010: Over the next year, what do you envisage being your biggest business challenge?*

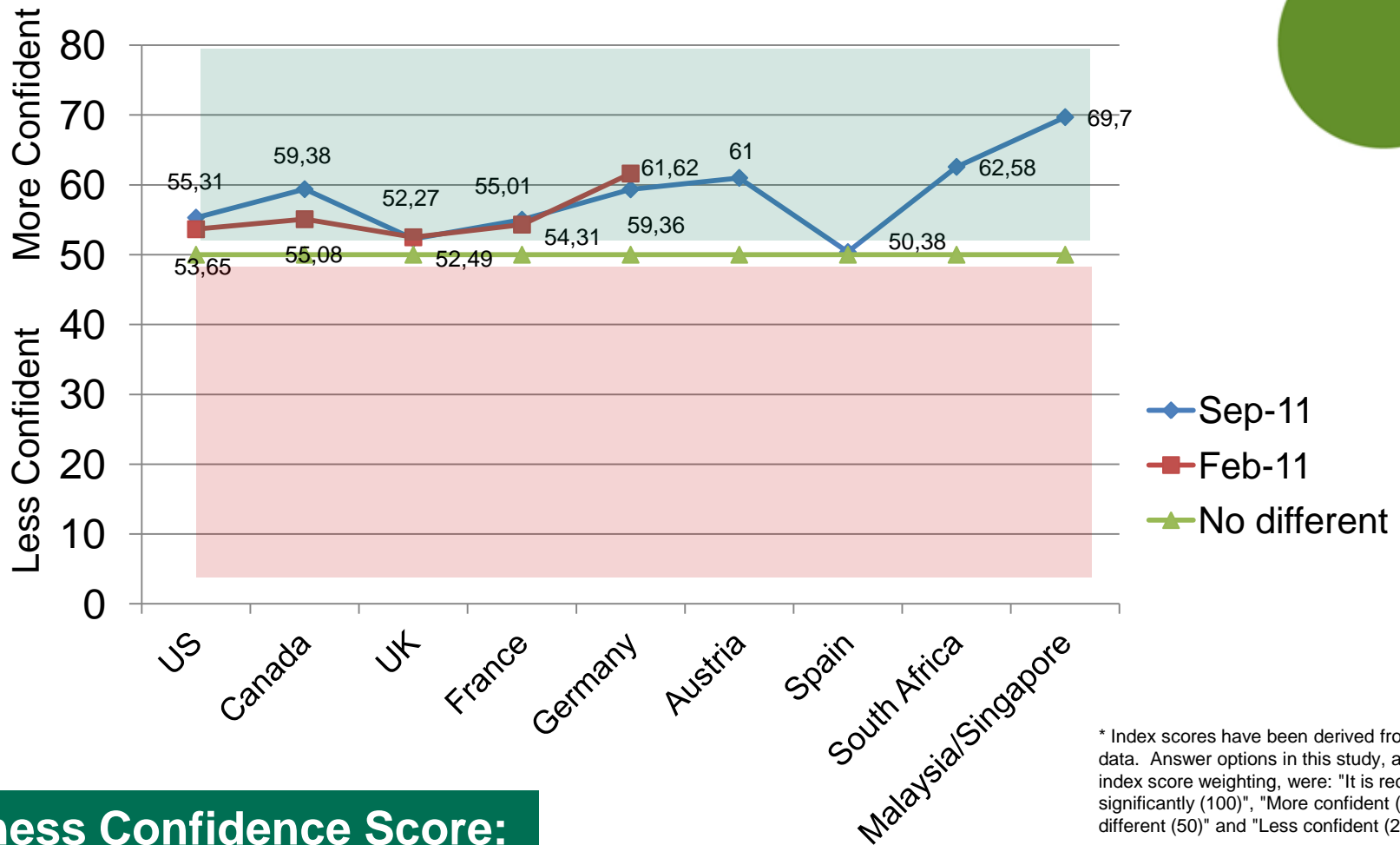


*Respondents could give multiple answers to this question



BUSINESS OUTLOOK FOR NEXT SIX MONTHS

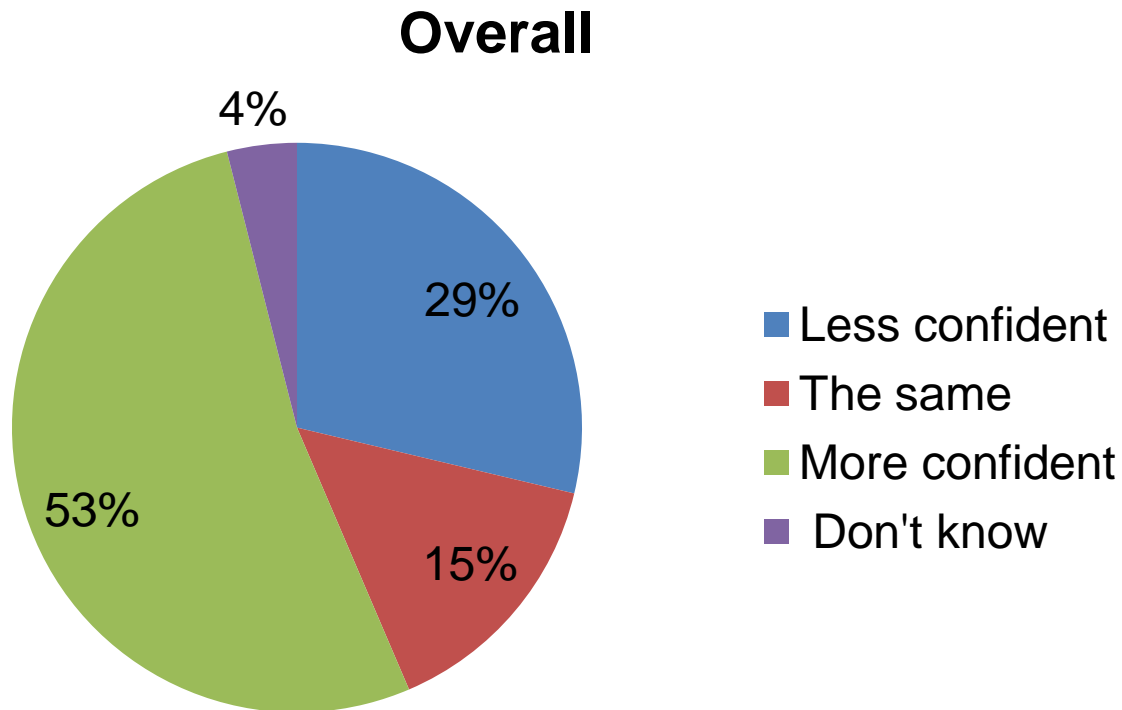
Compared to six months ago do you feel more or less confident about the prospects for your business in the next six months?



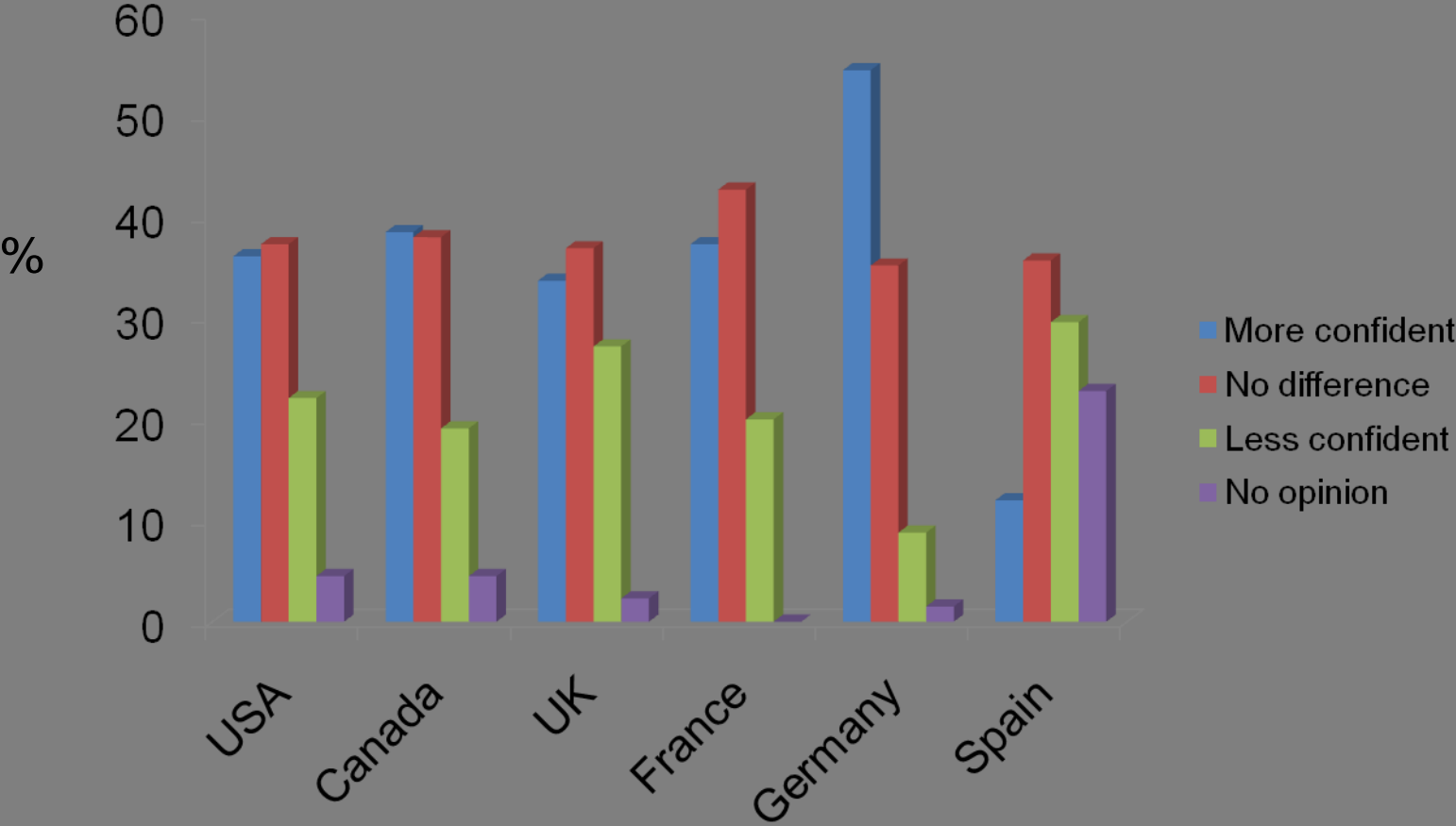
* Index scores have been derived from Feb 2011 data. Answer options in this study, and their index score weighting, were: "It is recovering significantly (100)", "More confident (75)", "No different (50)" and "Less confident (25)"

Business Confidence Score:
February: 56.48*
September: 57.88

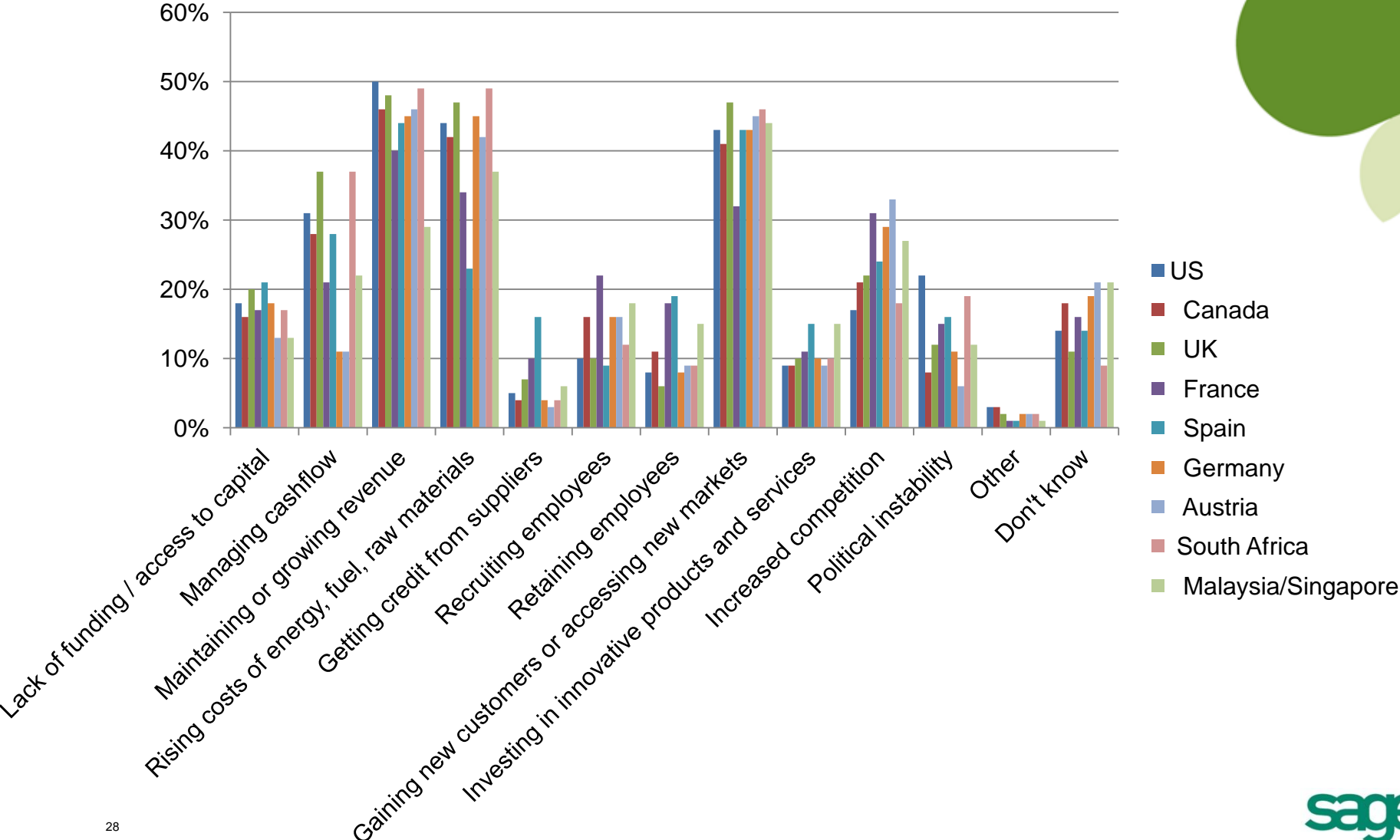
Compared to six months ago do you feel more or less confident about the prospects for your business in the next six months? (By overall percentage)



2010: Compared to this time last year do you feel more or less confident about your business prospects in the year ahead?

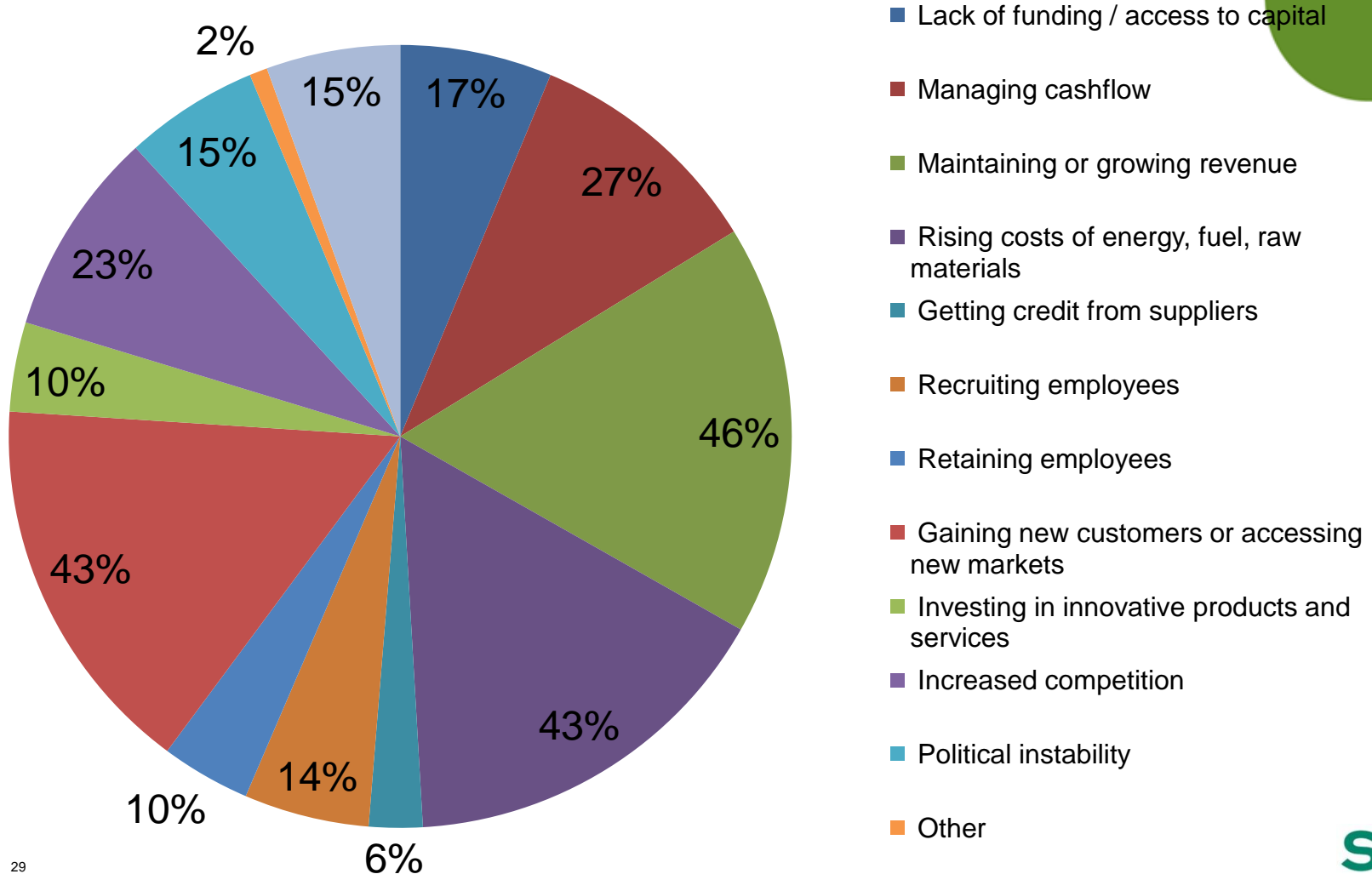


Over the next six months what do you envisage being your biggest business challenges? (Selected in top three)

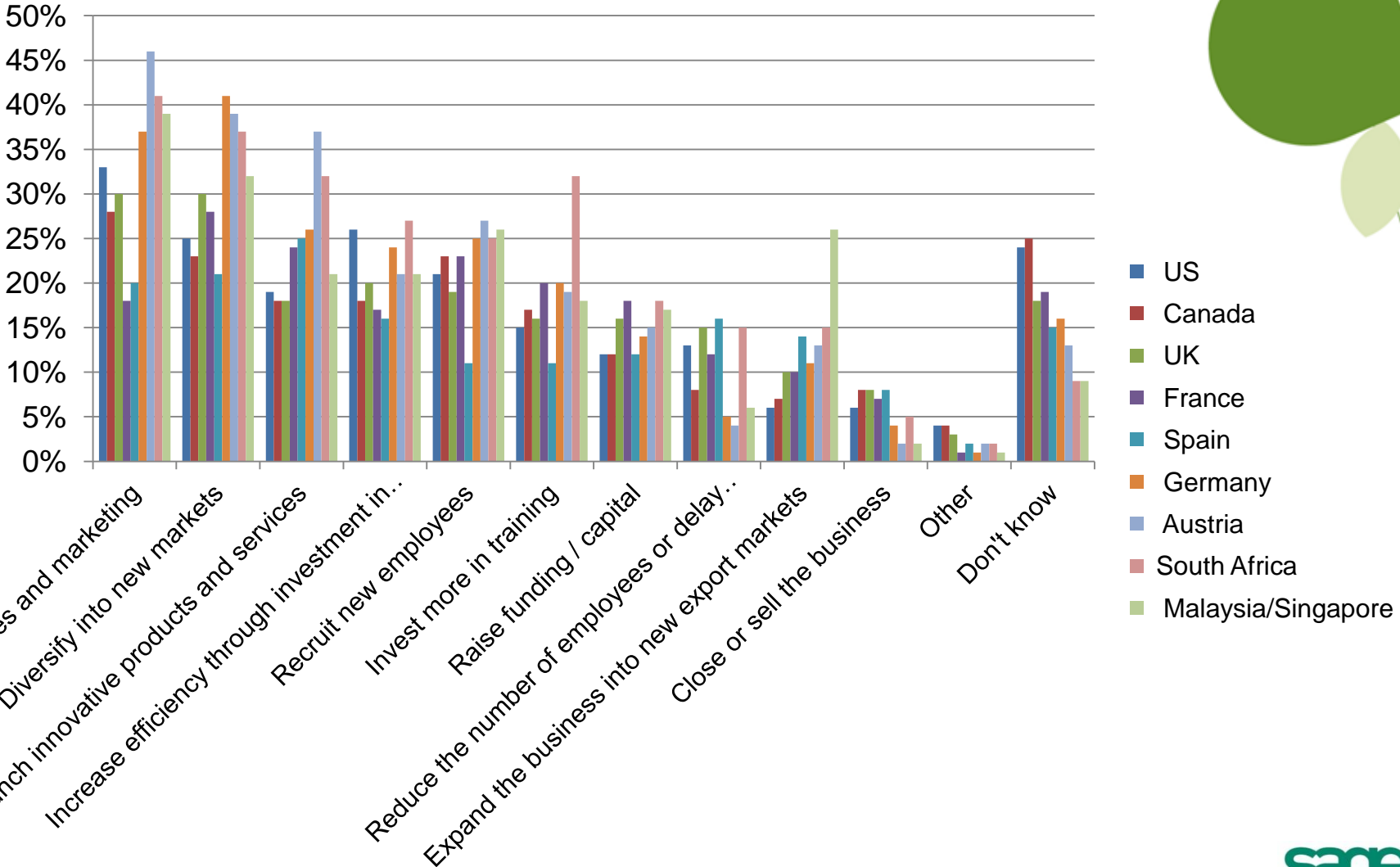


Over the next six months what do you envisage being your biggest business challenges? (Selected in top three)

Overall

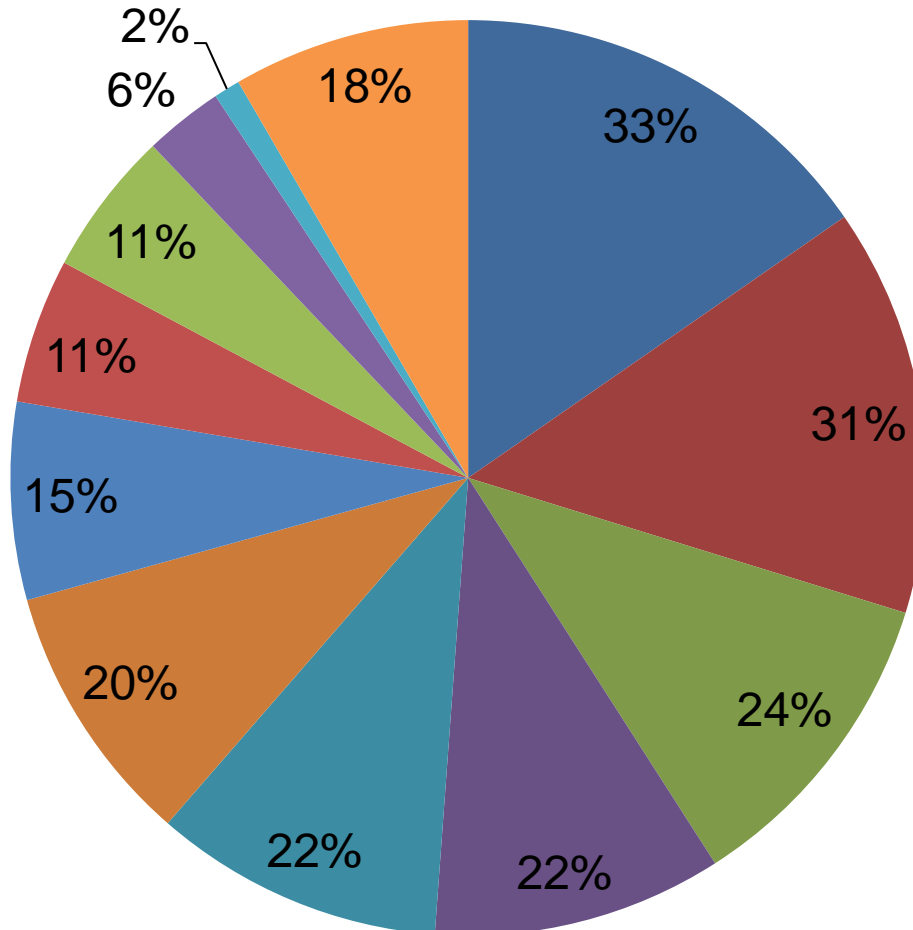


Which of the following do you plan to do in the next year?



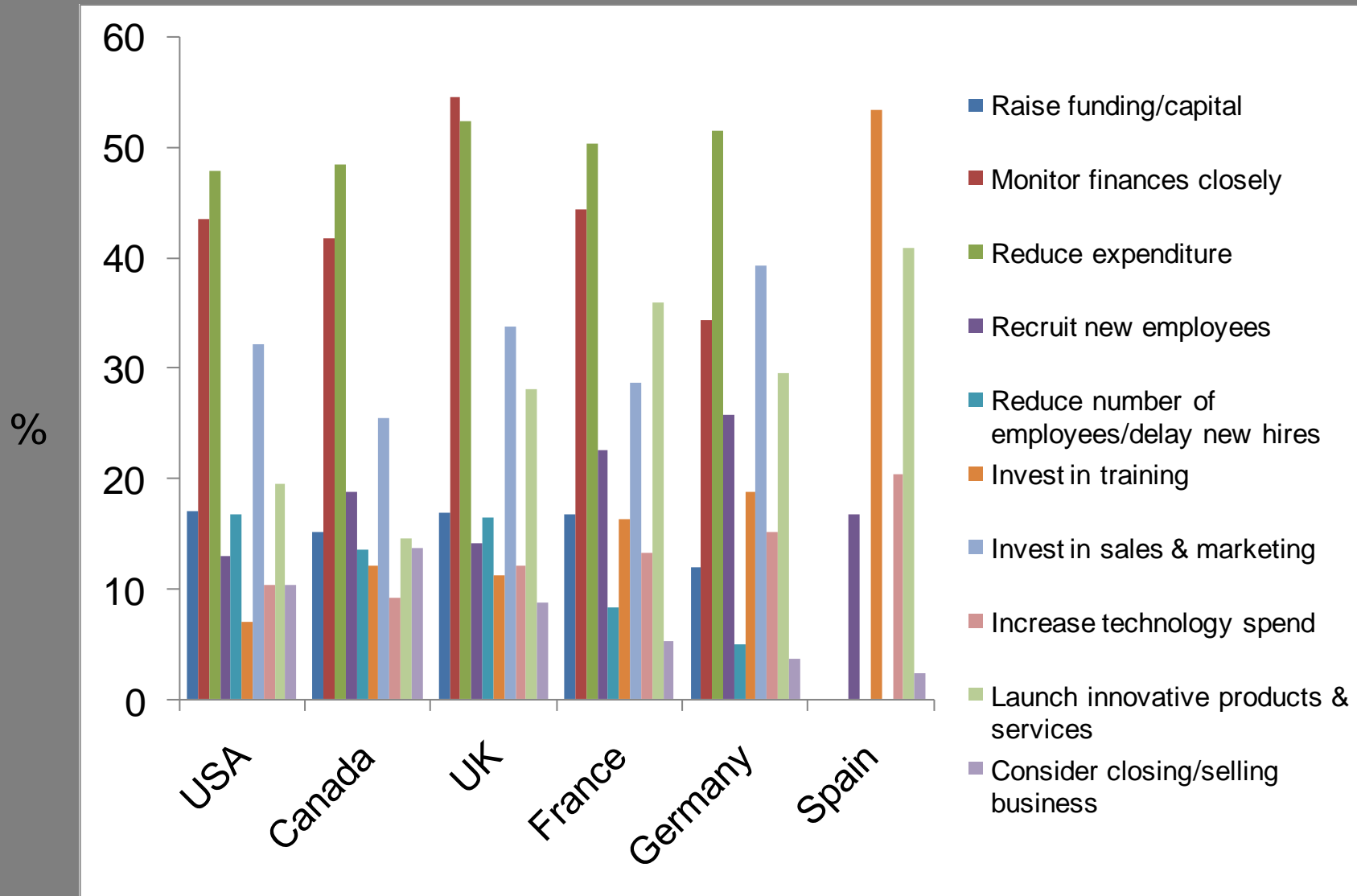
Which of the following do you plan to do in the next year?

Overall



- Invest in sales and marketing
- Diversify into new markets
- Launch innovative products and services
- Increase efficiency through investment in technology
- Recruit new employees
- Invest more in training
- Raise funding / capital
- Reduce the number of employees or delay hiring
- Expand the business into new export markets
- Close or sell the business
- Other
- Don't know

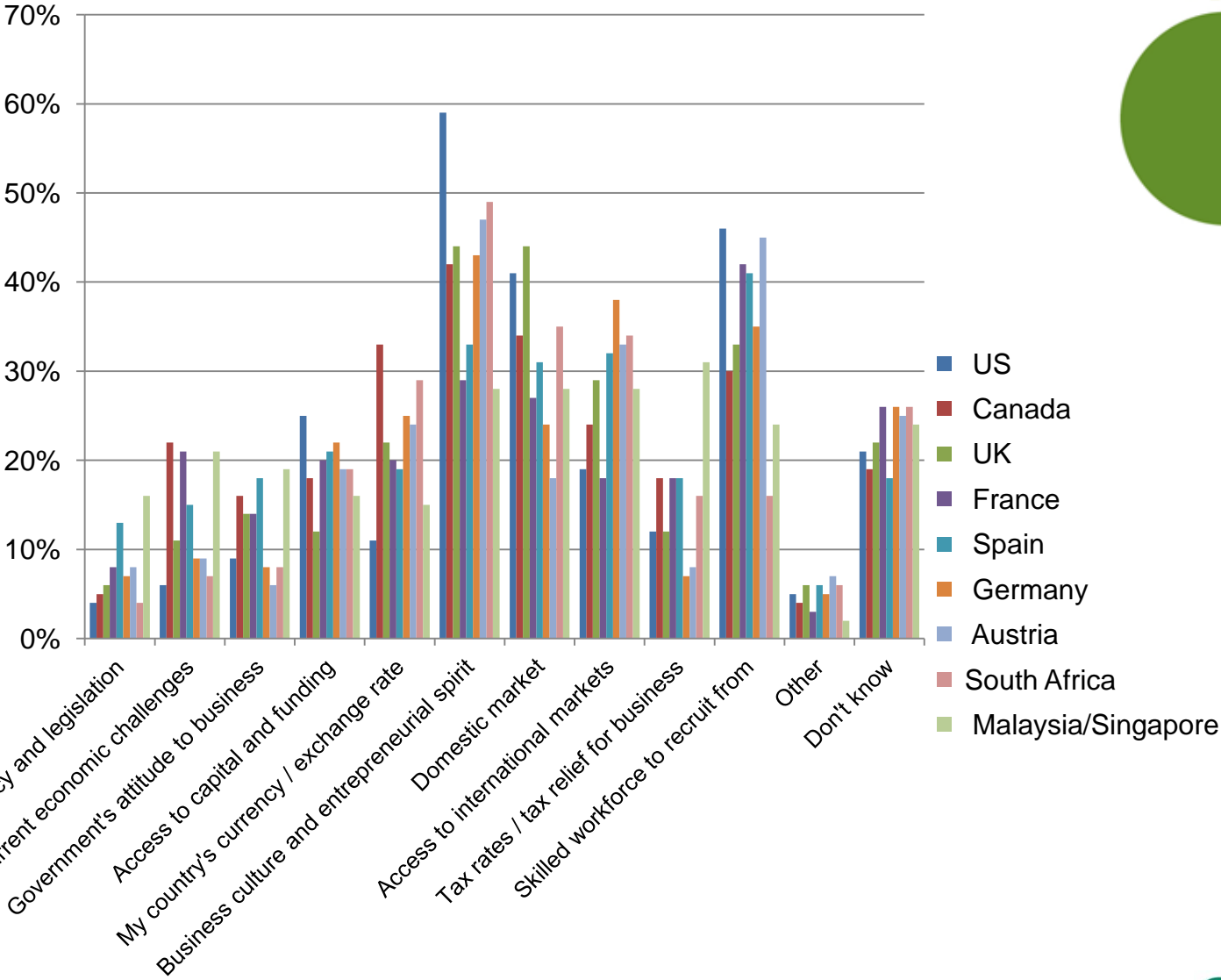
2010: Which of these do you plan to do next year?*





YOUR COUNTRY AS A PLACE TO DO BUSINESS

Thinking of your country as a place to do business in, what are the most favourable aspects about it? (selected in top three)



Government business bureaucracy and legislation
 Government handling of current economic challenges
 Government's attitude to business
 Access to capital and funding
 My country's currency / exchange rate
 Business culture and entrepreneurial spirit

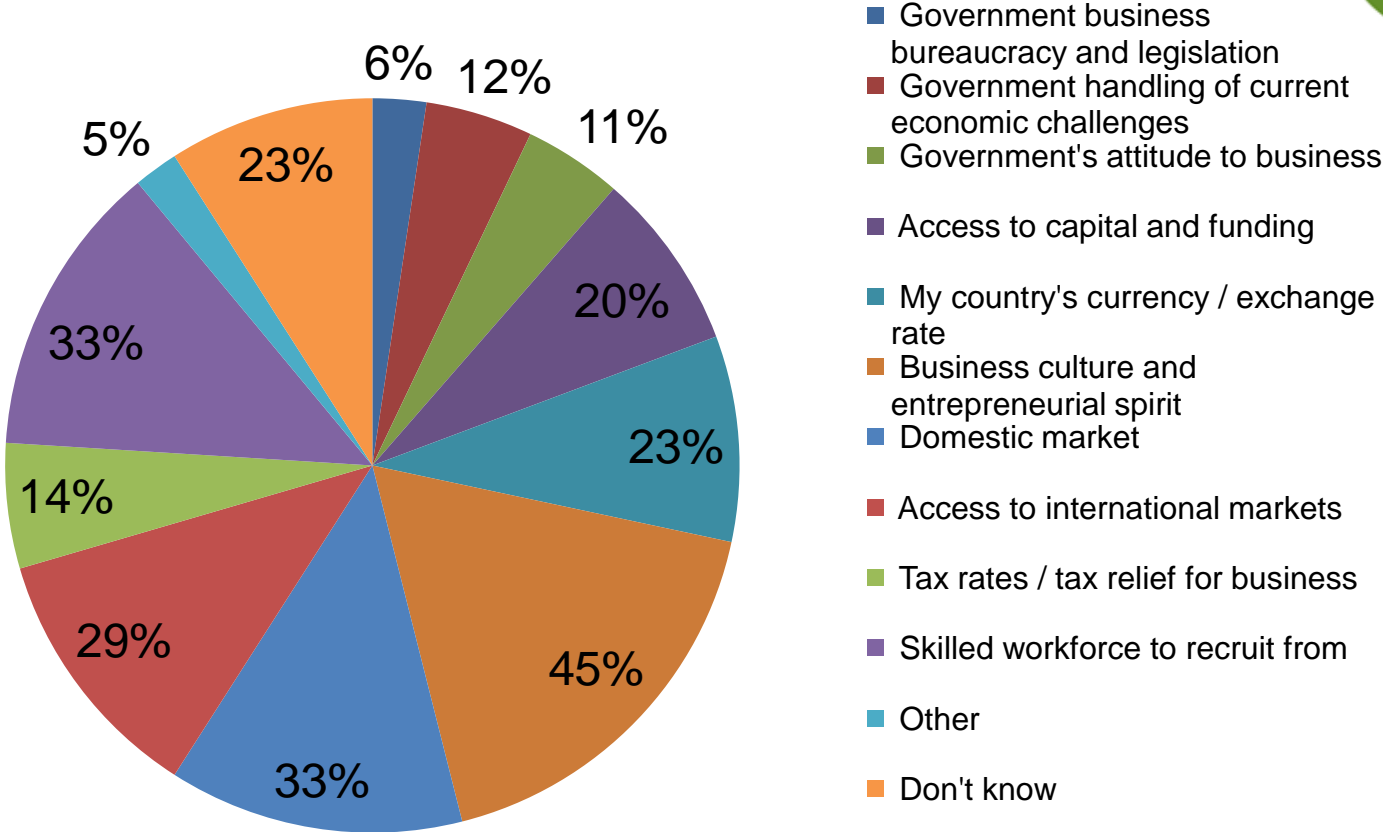
Domestic market
 Access to international markets
 Tax rates / tax relief for business
 Skilled workforce to recruit from

Other
 Don't know

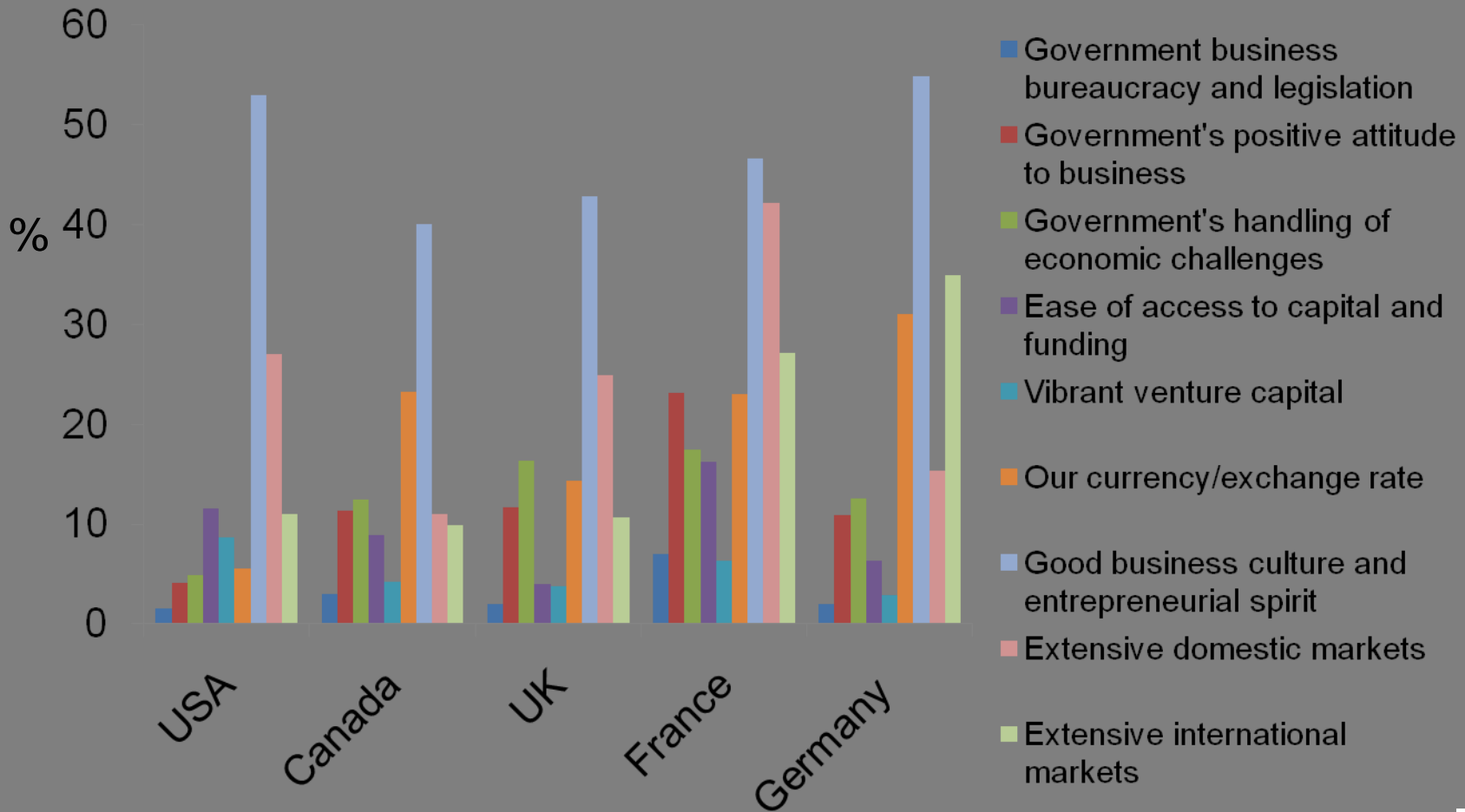
- US
- Canada
- UK
- France
- Spain
- Germany
- Austria
- South Africa
- Malaysia/Singapore

Thinking of your country as a place to do business in, what are the most favourable aspects about it?

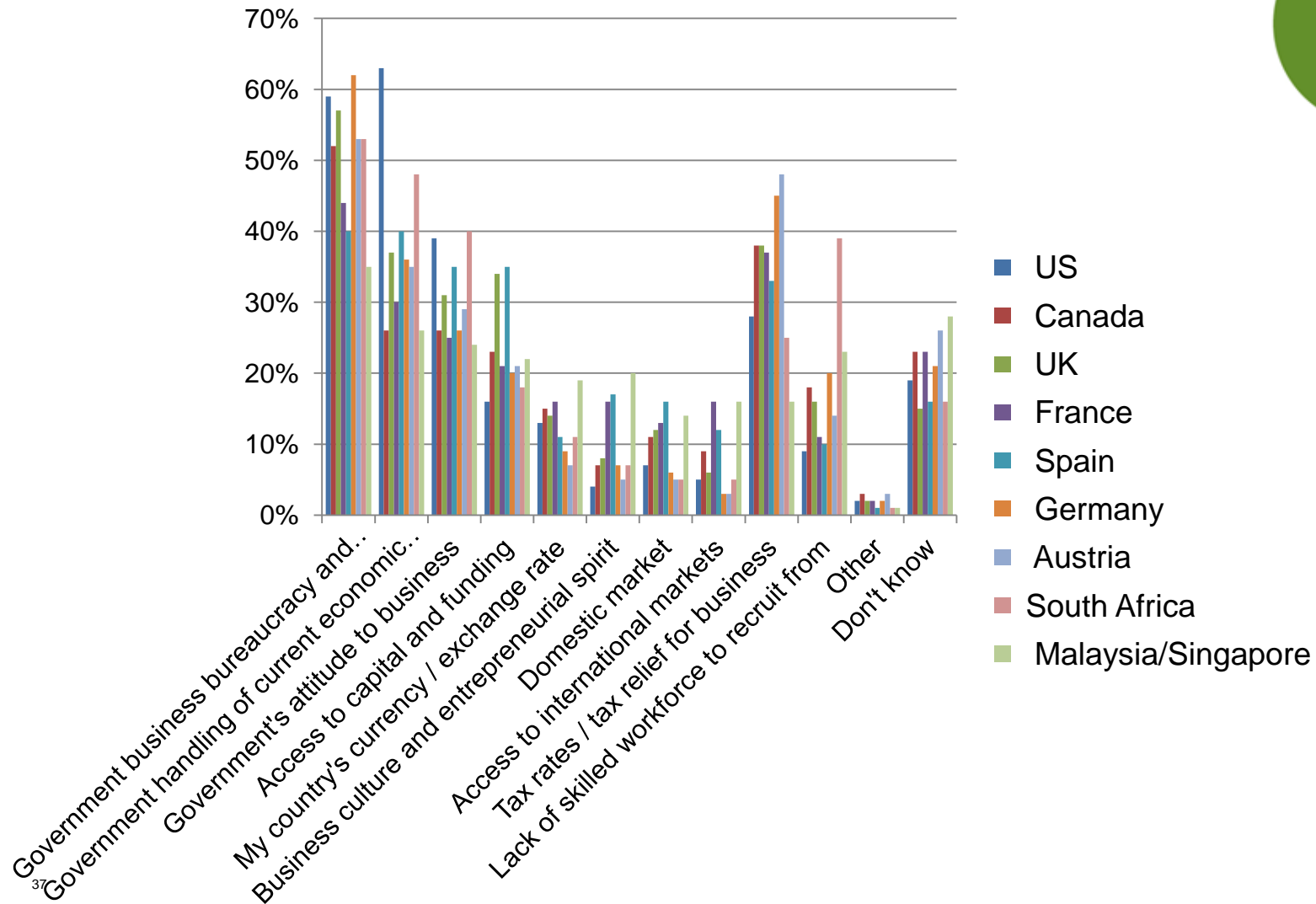
Overall



2010: Thinking of your country as place to do business, what are the most favourable aspects?*



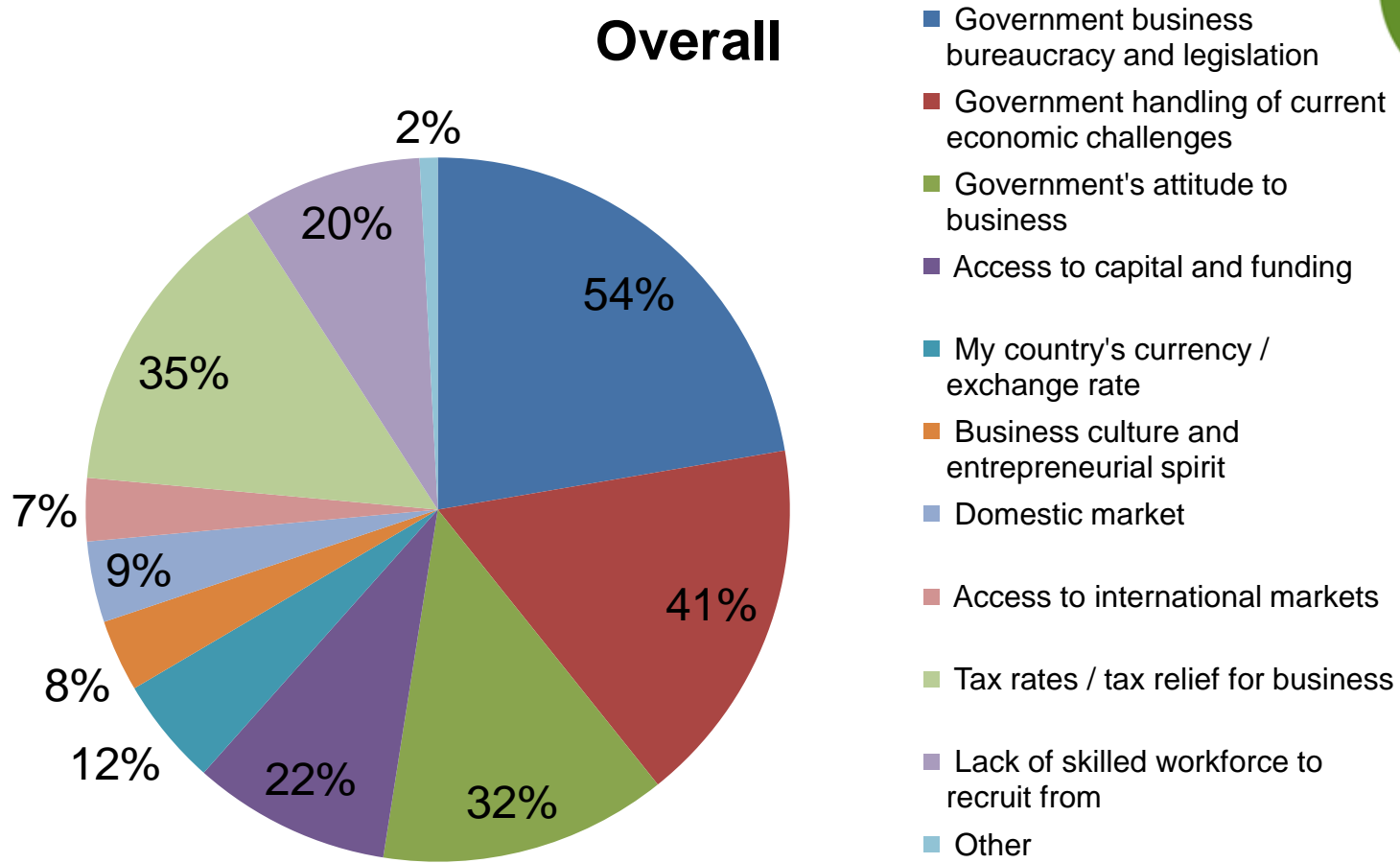
Thinking of your country as a place to do business in, what are the least favourable aspects about it? (selected in top three)



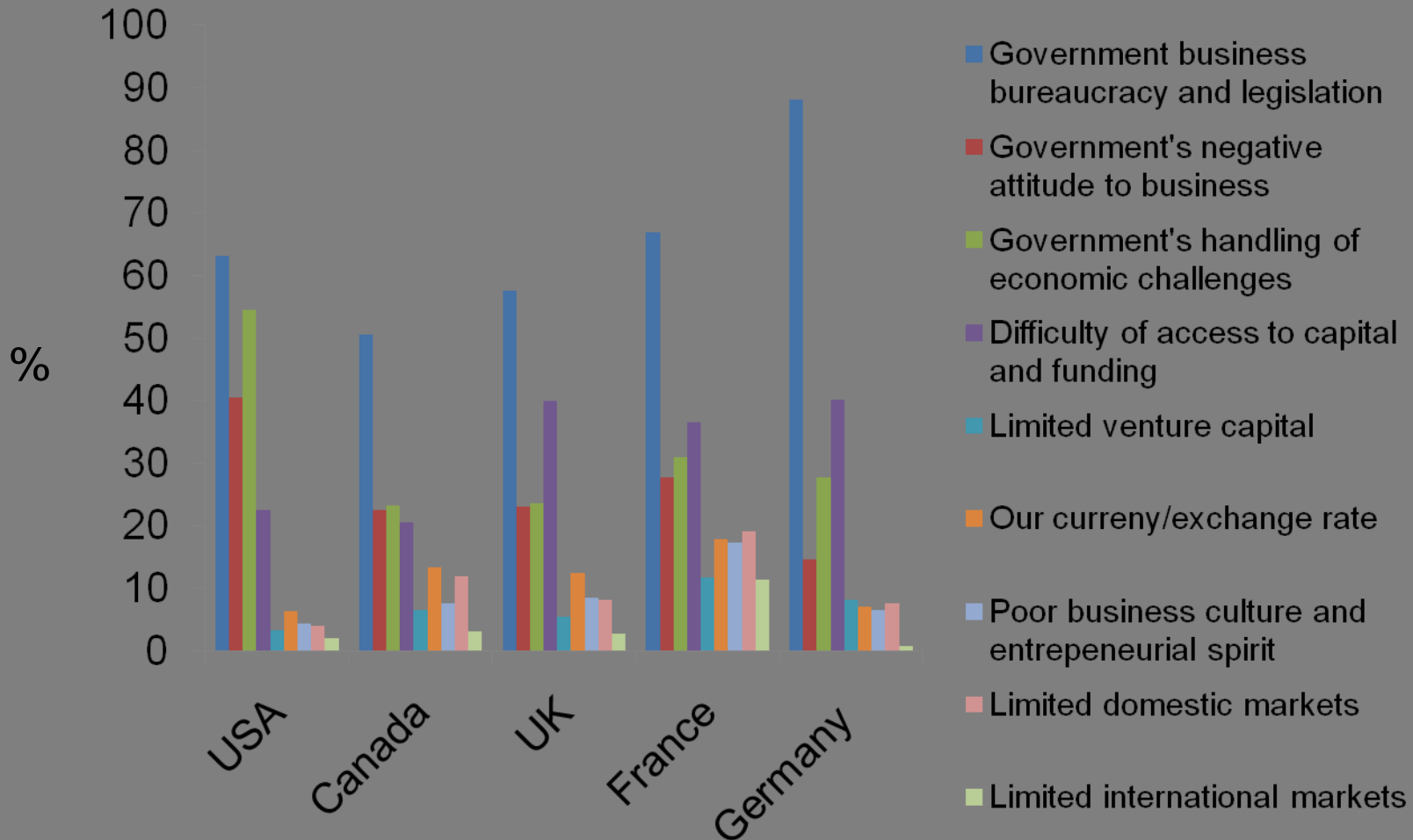
Thinking of your country as a place to do business in, what are the least favourable aspects about it?



Overall



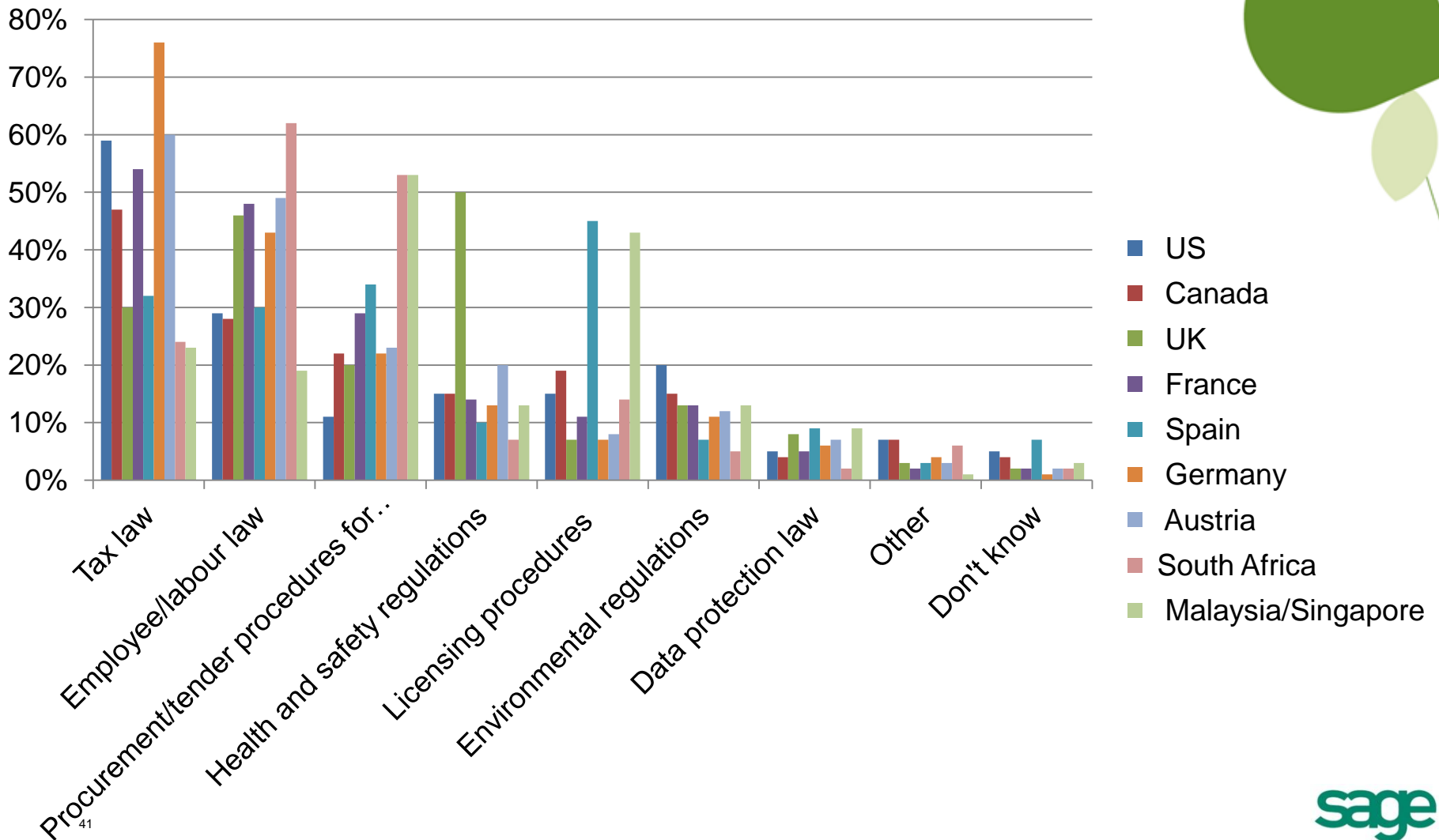
2010: Thinking of your country as place to do business, what are the least favourable aspects?*



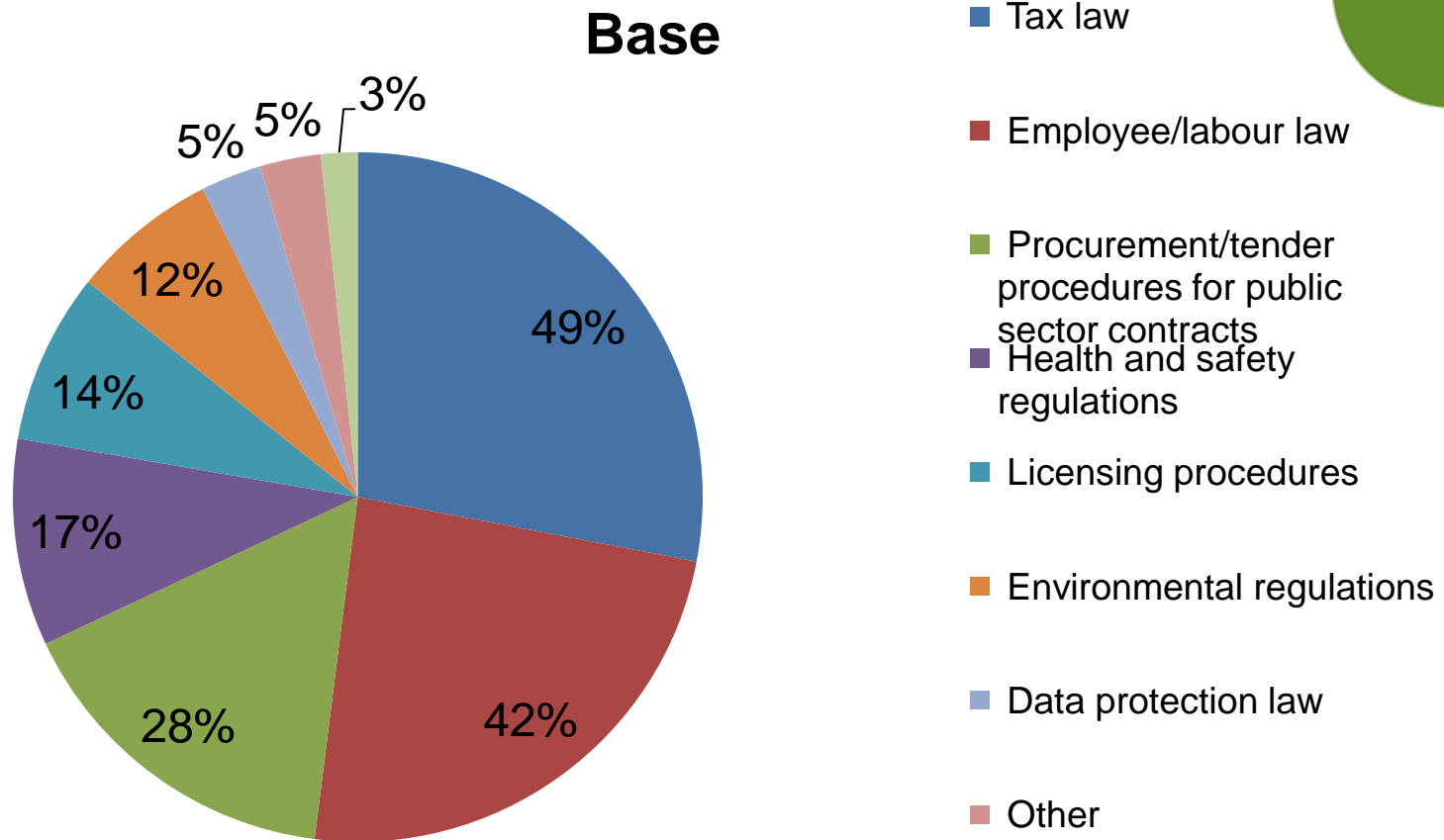


THE ROLE OF GOVERNMENT

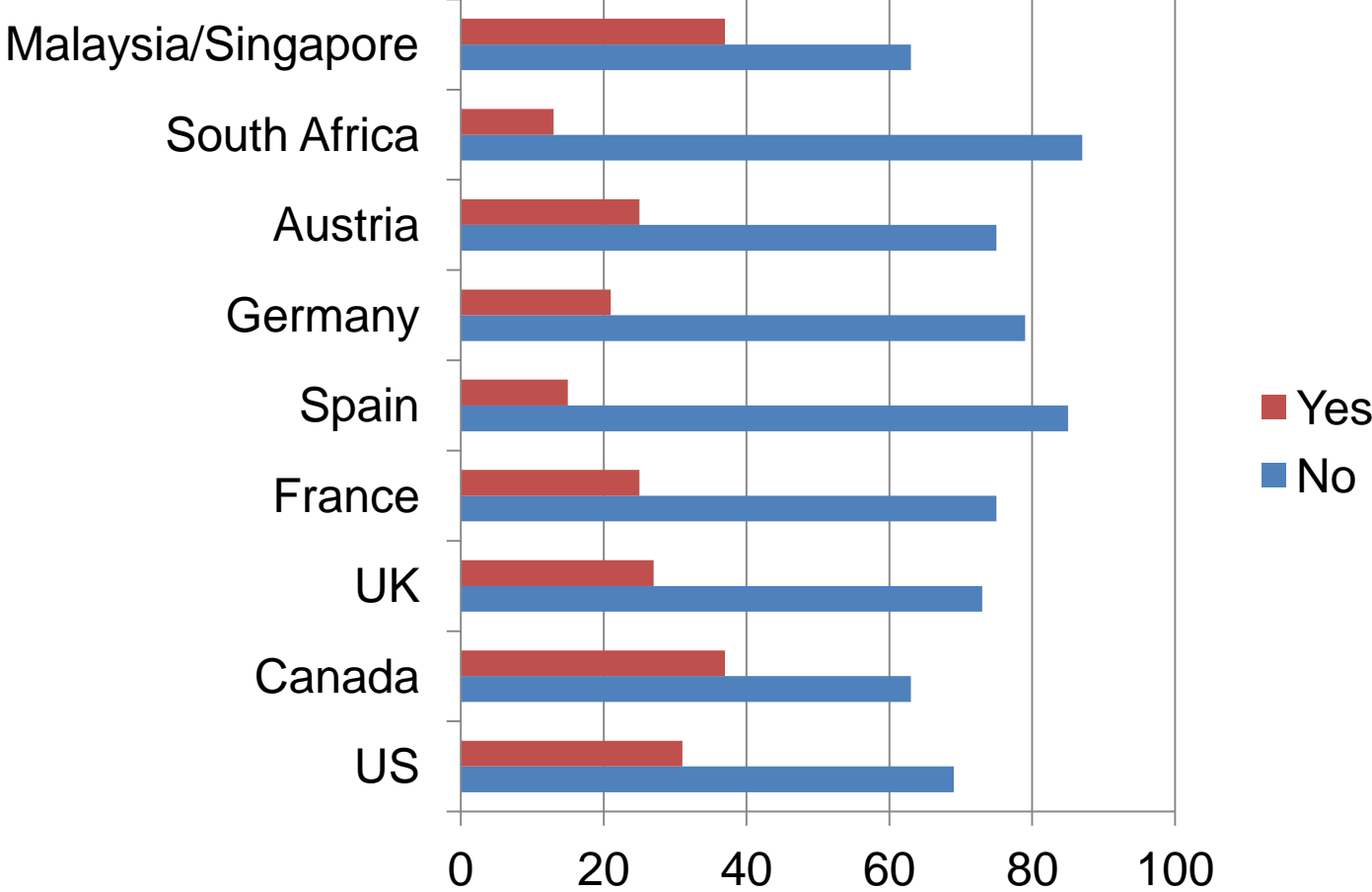
Which of the following areas within government business bureaucracy and legislation would you say are the most burdensome?



Which of the following areas within government business bureaucracy and legislation would you say are the most burdensome

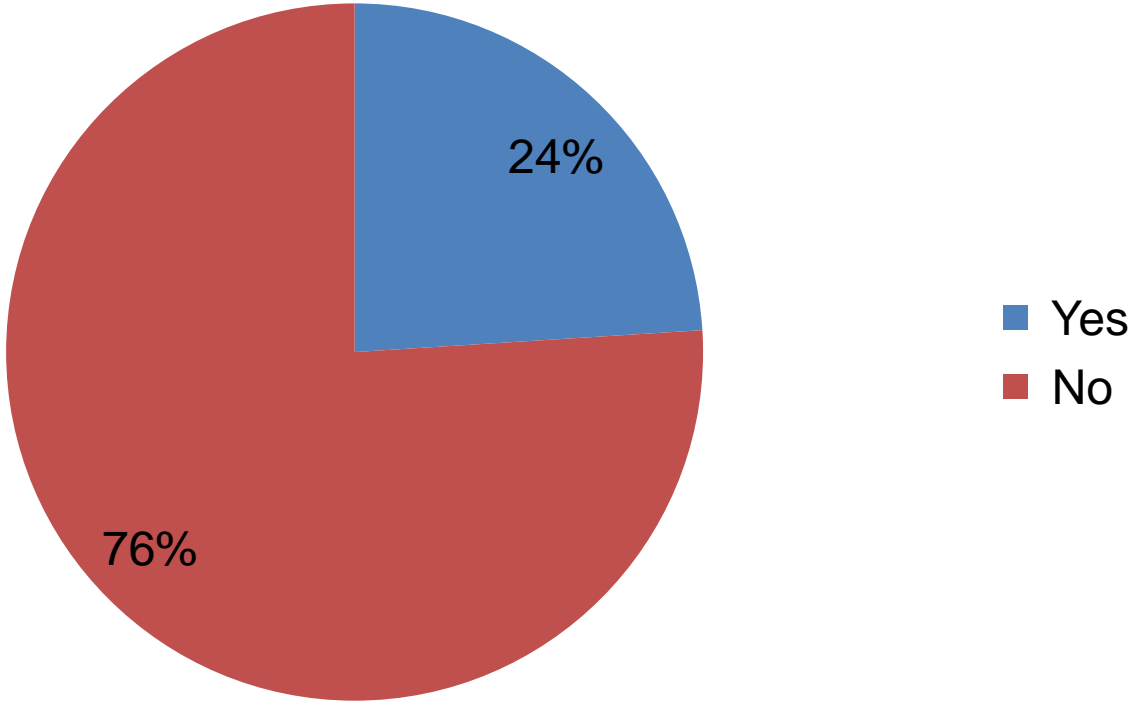


Do you think your Government provides sufficient support and advice for businesses like yours?

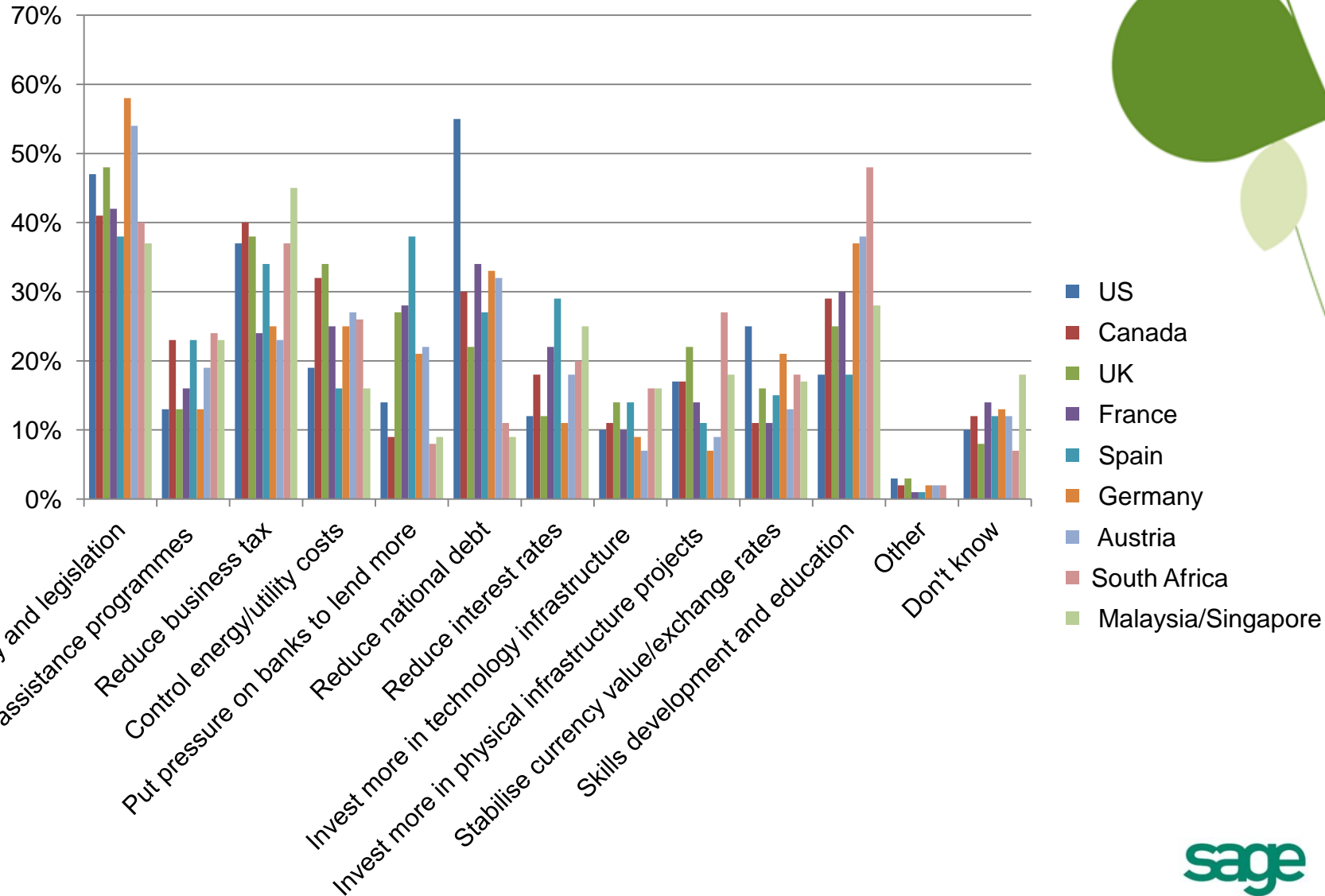


Do you think your Government provides sufficient support and advice for businesses like yours?

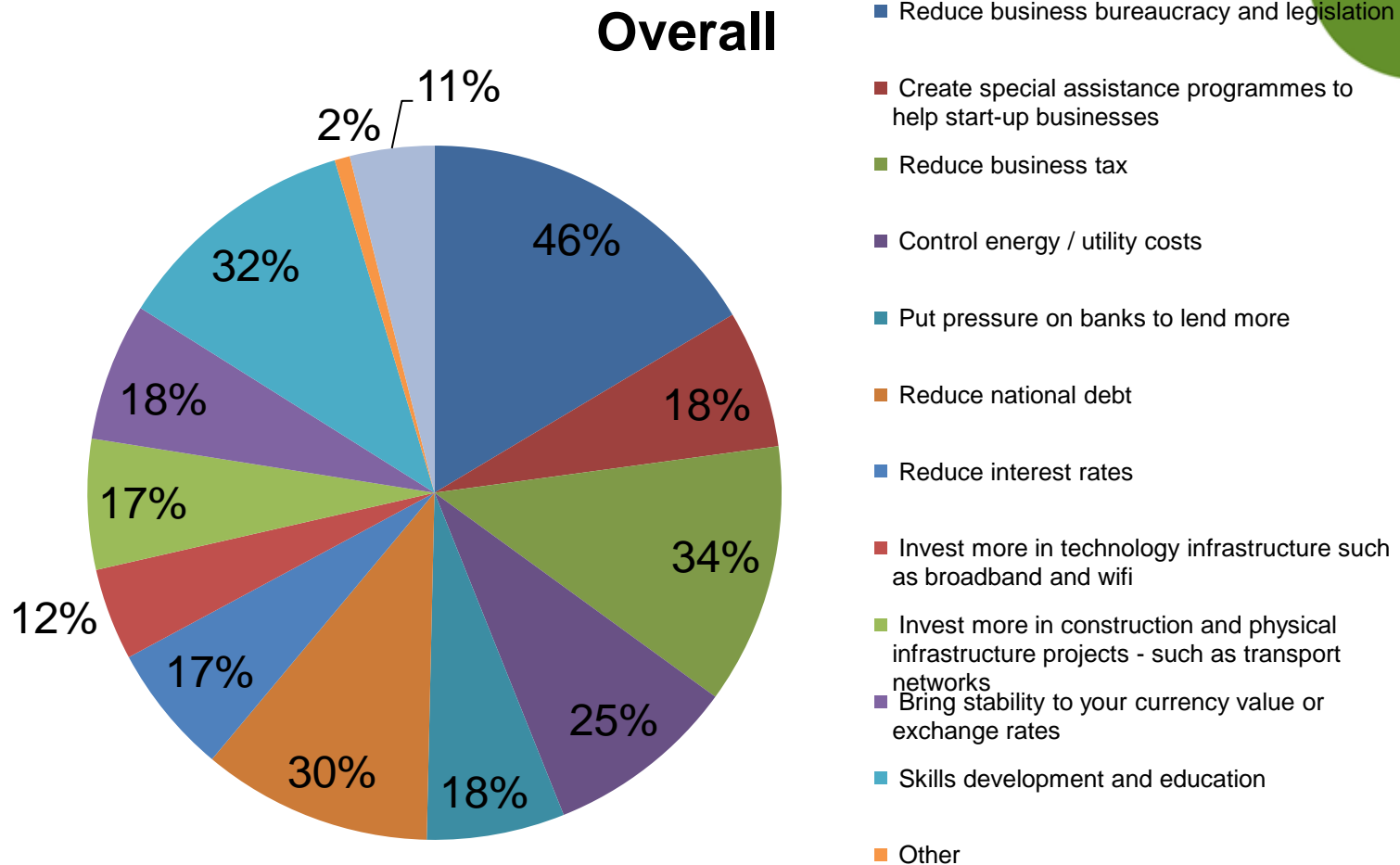
Overall



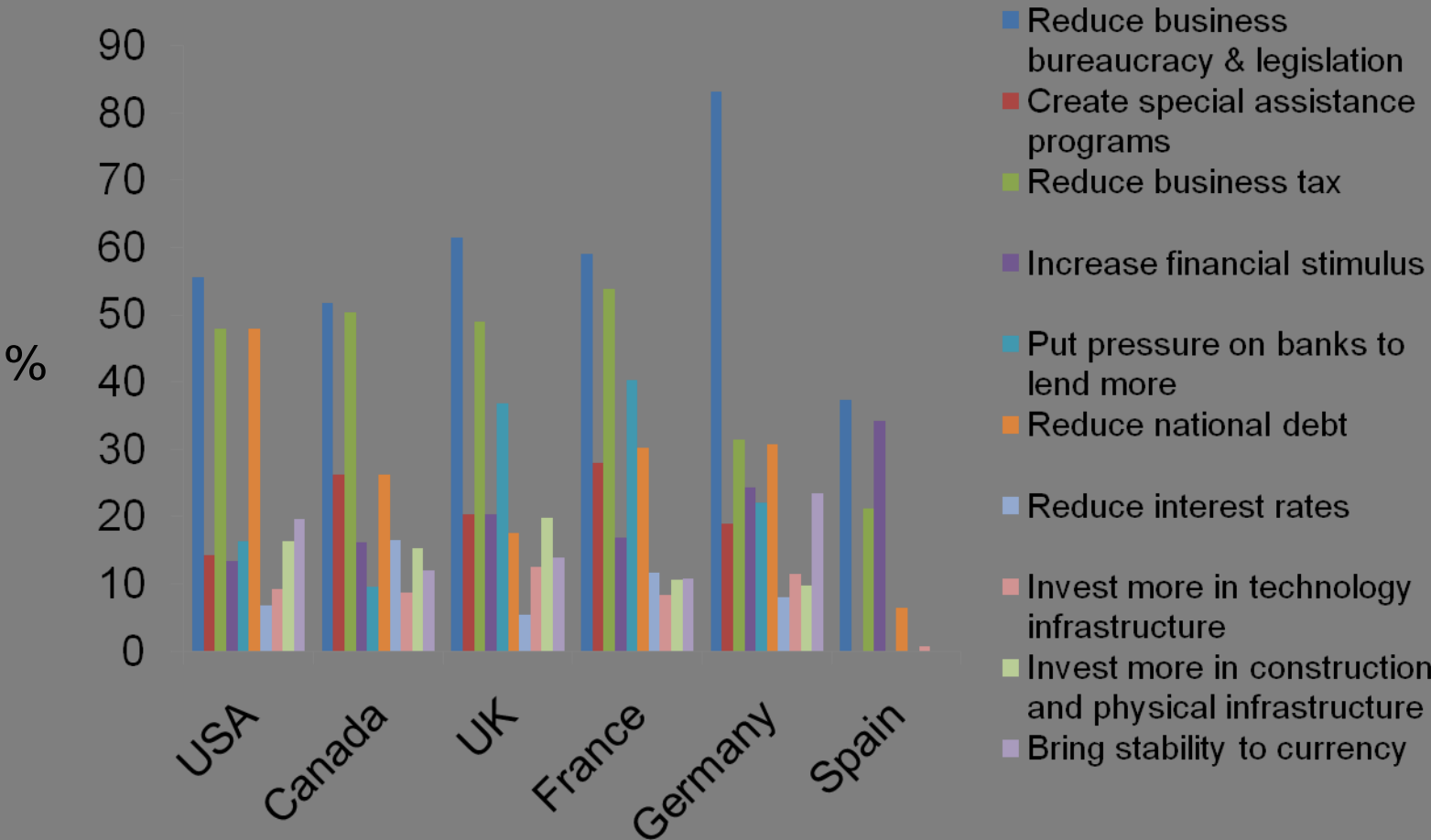
What do you think are the three most important things your Government should be doing to help businesses in your country? (selected in top 3)



What do you think are the three most important things your Government should be doing to help businesses in your country? (selected in top 3)



2010: What do you think your Government should be doing to help your business?*



*Respondents could give multiple answers to this question





Sage Business Index Survey Findings

September 2011

