

Grow NZ 2015

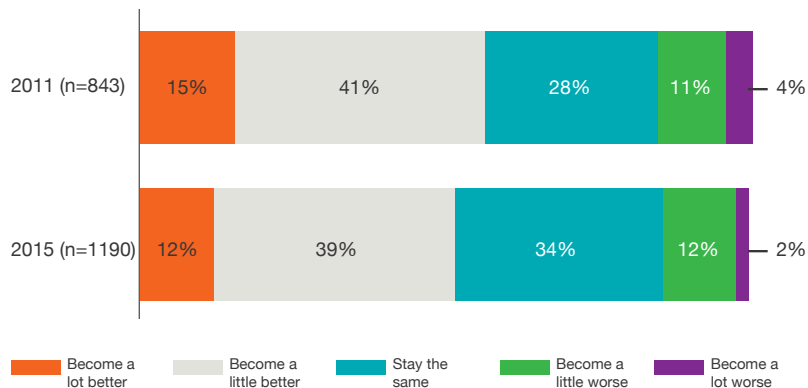
January 2015 | Prepared by Nexus Planning & Research



Business Confidence and Position

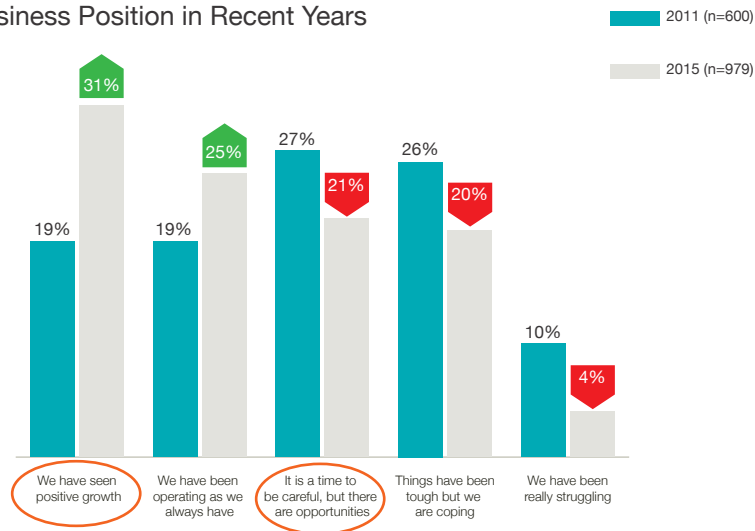
Business Confidence and Position

Business Confidence in the Next 12 Months



Q. Thinking about the next 12 months, do you expect the general business conditions for the industry in which you operate to ...? Base: Total sample

Business Position in Recent Years



Q. Which of the following best describes how your business has been operating in recent years? Base: Established businesses (excluding startups)

Overall business confidence improved since 2011 and most SMEs in better financial shape

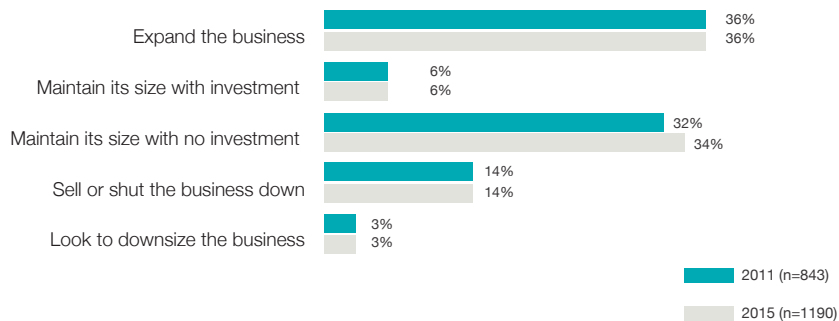


Future Plans and Investment & Barriers to Growth

Future Plans & Investment

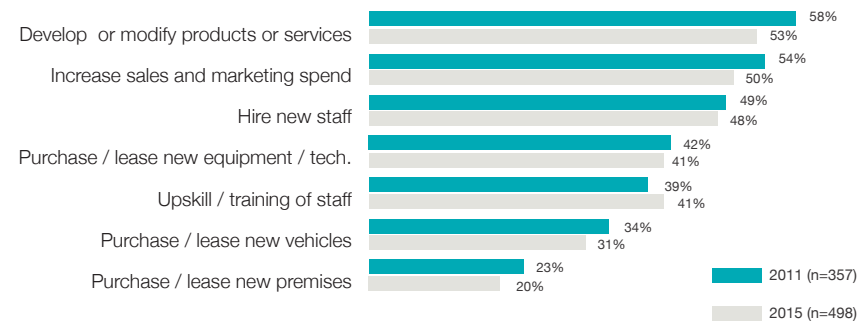
Economic conditions are better but.....

Plans for the business in the next few years



Q. Which of the following best describes what your plans are for the business in the next few years?

Potential Investment Next 3 years



Q. Which of these actions does your business intend to undertake in the next three years?

Base: Those who are planning to invest in their business.

Barriers to Growth

	2011	2015		2011	2015
Want to maintain my work / life balance	15%	21%	IRD / taxes	6%	6%
Want to retire / leave the business soon	6%	10%	Lack of funds	15%	11%
Current state of the market	20%	9%	Debt leveraged against personal assets	3%	3%
Increased competition	6%	7%	Currency exchange rates	1%	2%
Increased business costs	6%	6%	Access to international markets	1%	0%
Lack of qualified staff	4%	9%	Other	3%	4%
Need for new technology	0%	1%	None of these	4%	5%
Political / regulatory issues	4%	5%	Base n=	843	1,190

Better economic conditions encourage more SMEs to maintain work/life balance

Q. And which of these would you consider to be the single biggest obstacle to expanding your business?

Technology

Technology

SME Usage of Technology



Q. Which of the following does your business have or use?

Q. Does your business have a website?

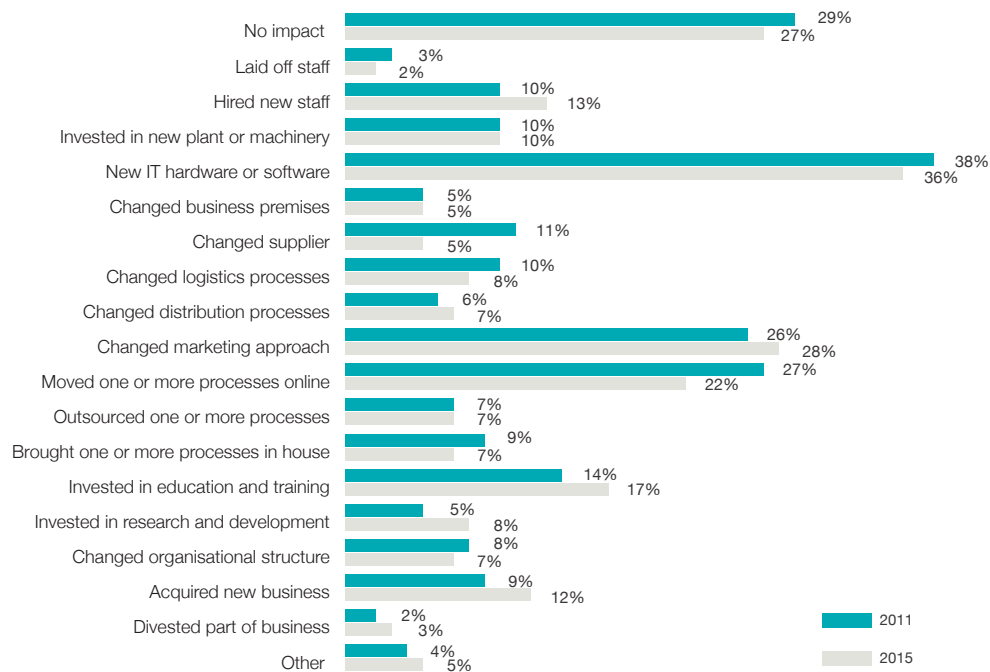
Q. And which of the following social media, if any, do you use for your business?

Base: Total sample 2015 (n=1190)

	Industry group			Turnover		
	Primary & Goods Producing	Wholesale & Retail Trade	Commercial Services	\$30K-\$249K	\$250k-\$999k	\$1M-\$4.99M
Smartphone or Tablet	79%	81%	83%	80%	84%	90%
Use social media	52%	68%	60%	59%	61%	63%
Have a website	49%	70%	54%	46%	65%	82%
Skype or other video conference facility	22%	19%	40%	33%	35%	37%
Filesharing	31%	28%	35%	31%	42%	38%
Online Scheduling or communication	14%	14%	24%	17%	26%	26%
Remote access technology	11%	17%	25%	14%	25%	32%
Dedicated Apps for your industry	12%	11%	21%	14%	21%	18%
Other Cloud based products or service	17%	10%	17%	12%	19%	22%
Mobile payment solution	7%	20%	14%	10%	15%	16%
Other	2%	2%	2%	3%	3%	1%
Base n=	226	209	434	656	389	145

Impact of Technology

Impact of Technology over the last/next 5 years



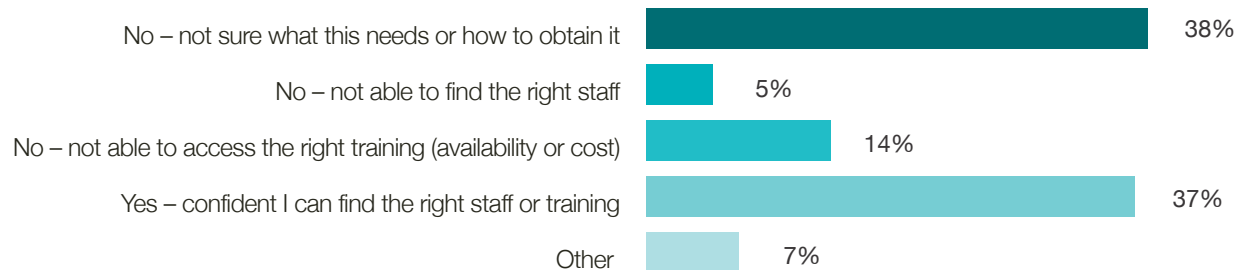
Do SMEs understand the advantages digital technology can deliver?

Q. Over the past/next 5 years, have these new digital technologies changed the way you do business in any of the following areas?

Impact of Technology

....finding the right staff is a challenge.

Able to find right Staff or Training?



Q. Are you confident that you can hire staff or upskill existing staff so you can take advantage of these new digital technologies?

Base: Those not confident of their ability to take advantage of the new technologies (n=248)