

SME Survey 2009



SMEs and the Recession

Presented by Arthur Goldstuck
October 2009

SME Survey 2009 sponsored by:

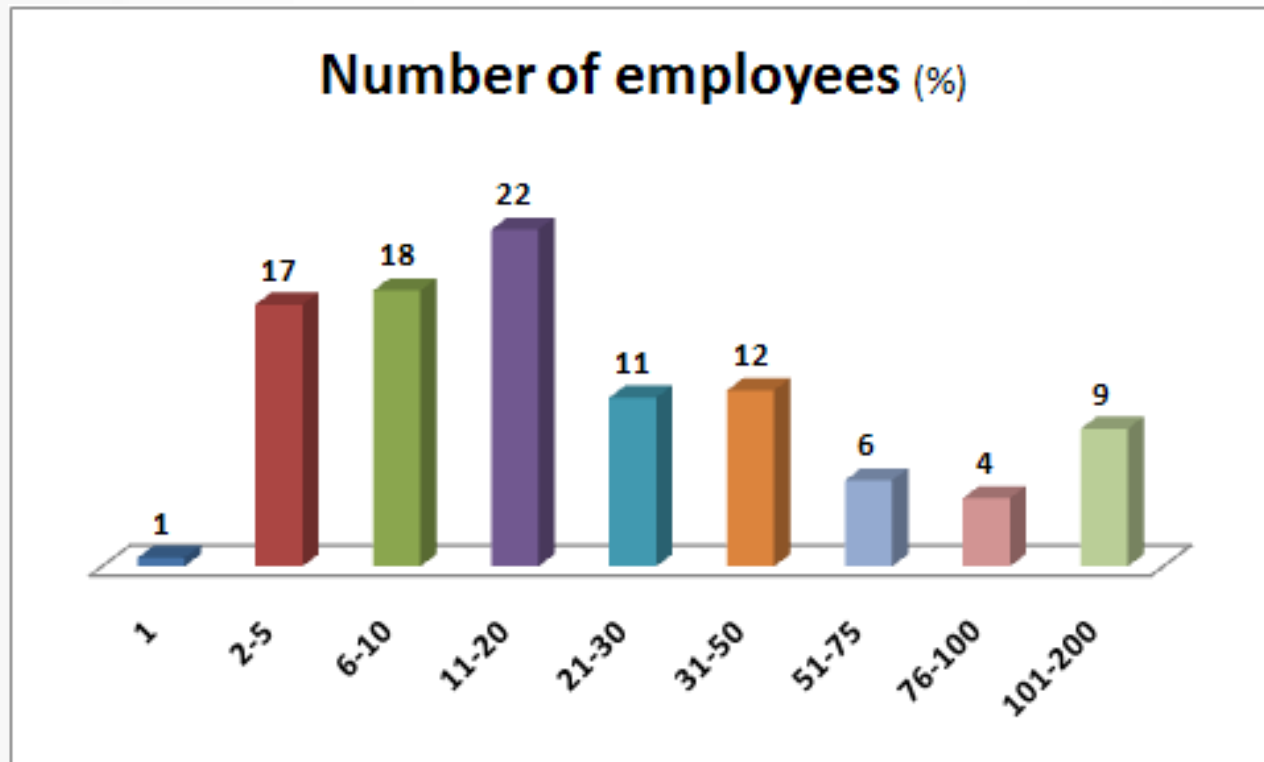


The Hypothesis

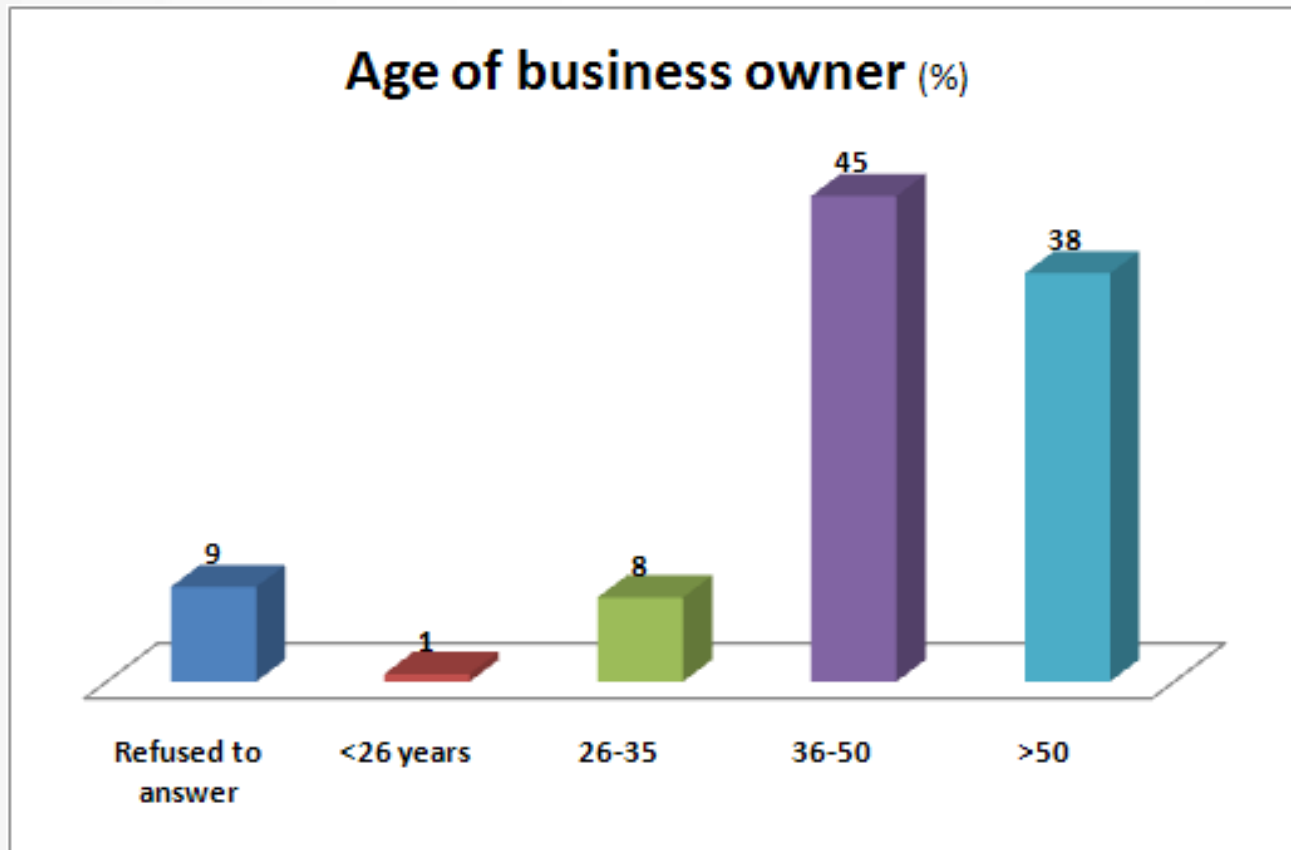
- ❑ The starting point for the 2009 survey was to assess the challenges posed to SMEs by the recession, from cash-flow to financing to profitability.
- ❑ The hypothesis was that the recession and threat of recession was having a major impact on the sustainability of SMEs but that, as was shown with the infrastructural challenges of 2008, SMEs had become flexible and adaptable.
- ❑ The survey set out to assess both the impact of the recession, the methods SMEs were using to survive the recession, and the impact of the recession on their confidence.
- ❑ By showing how responsive SMEs were to the new challenge, and what approaches they took to dealing with them, the research would also provide a blueprint for survival.

2500 telephonic interviews were conducted

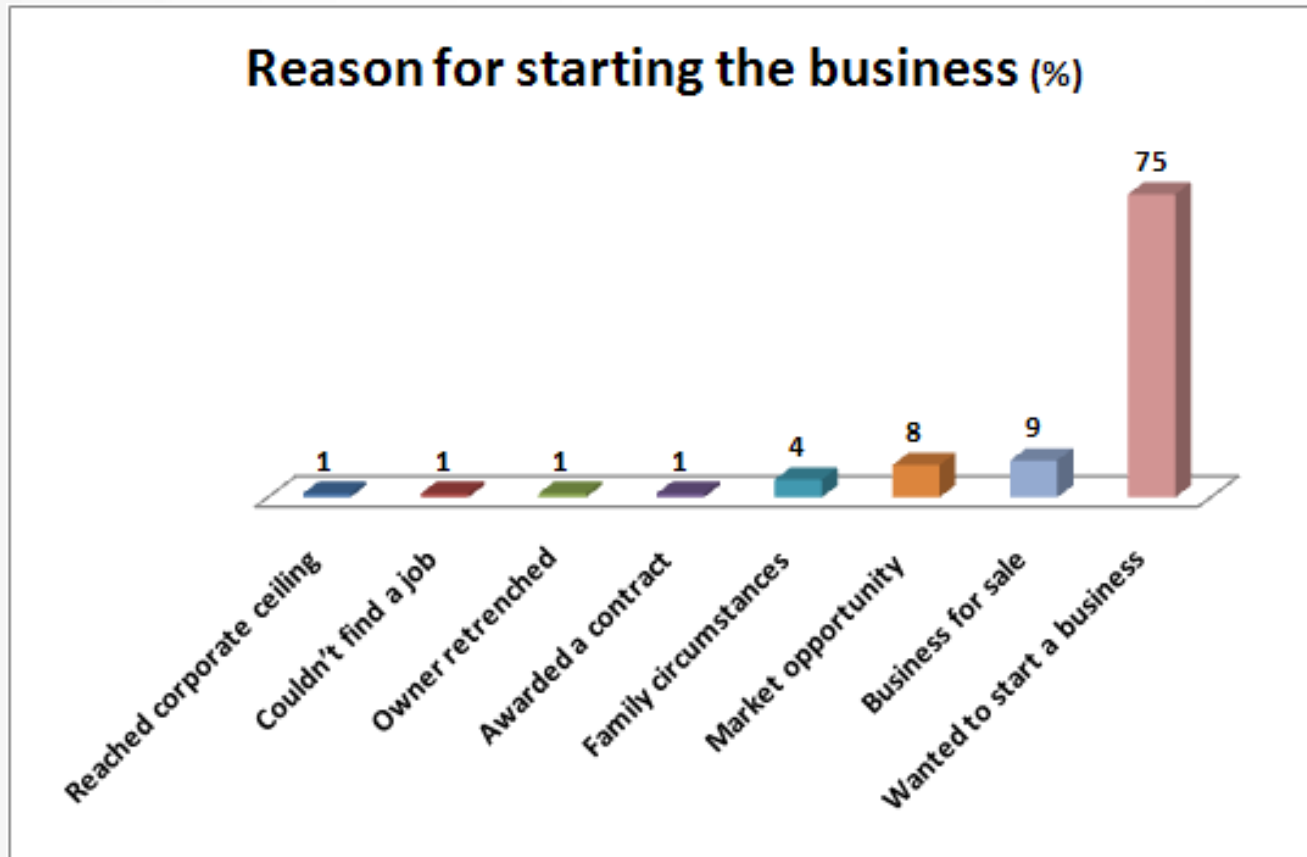
Well spread sample



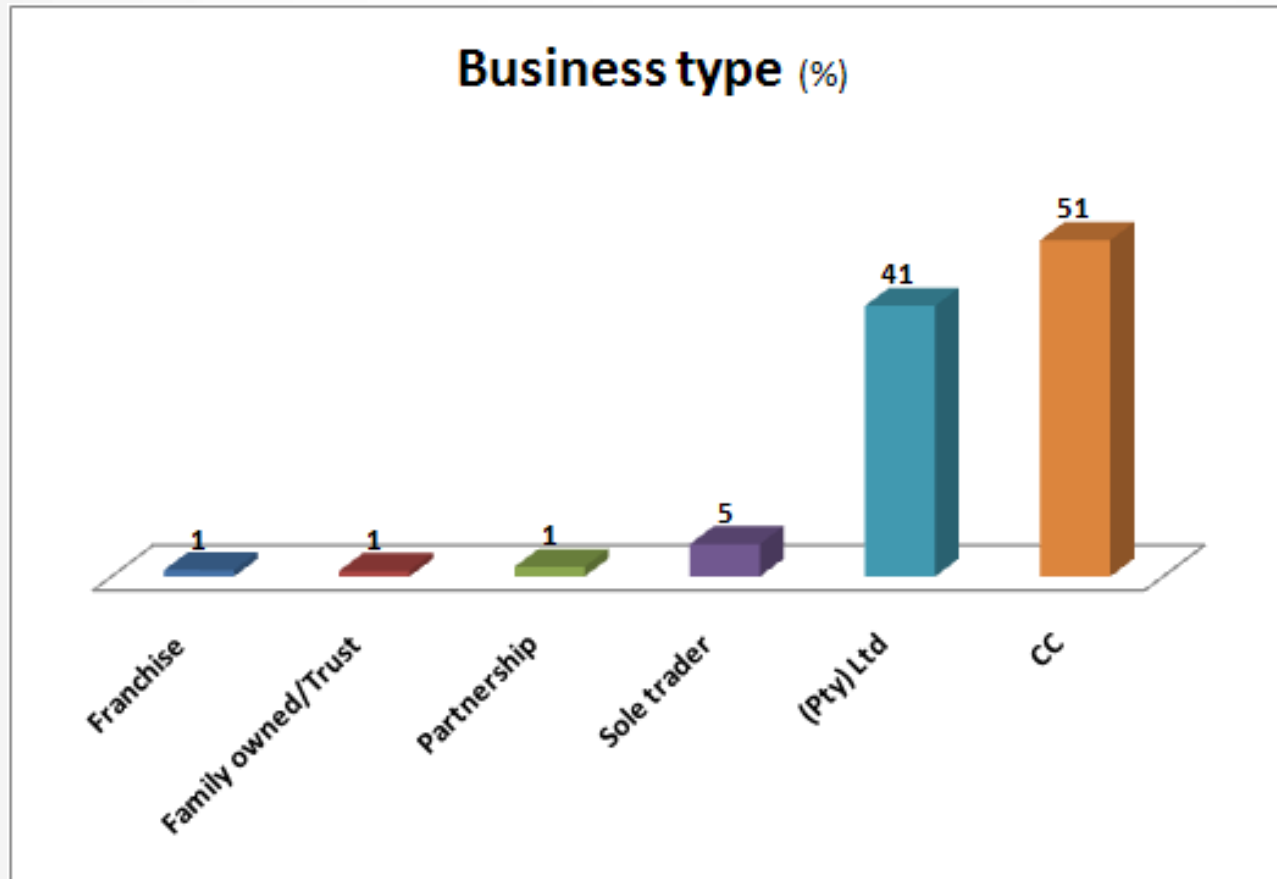
Experience counts



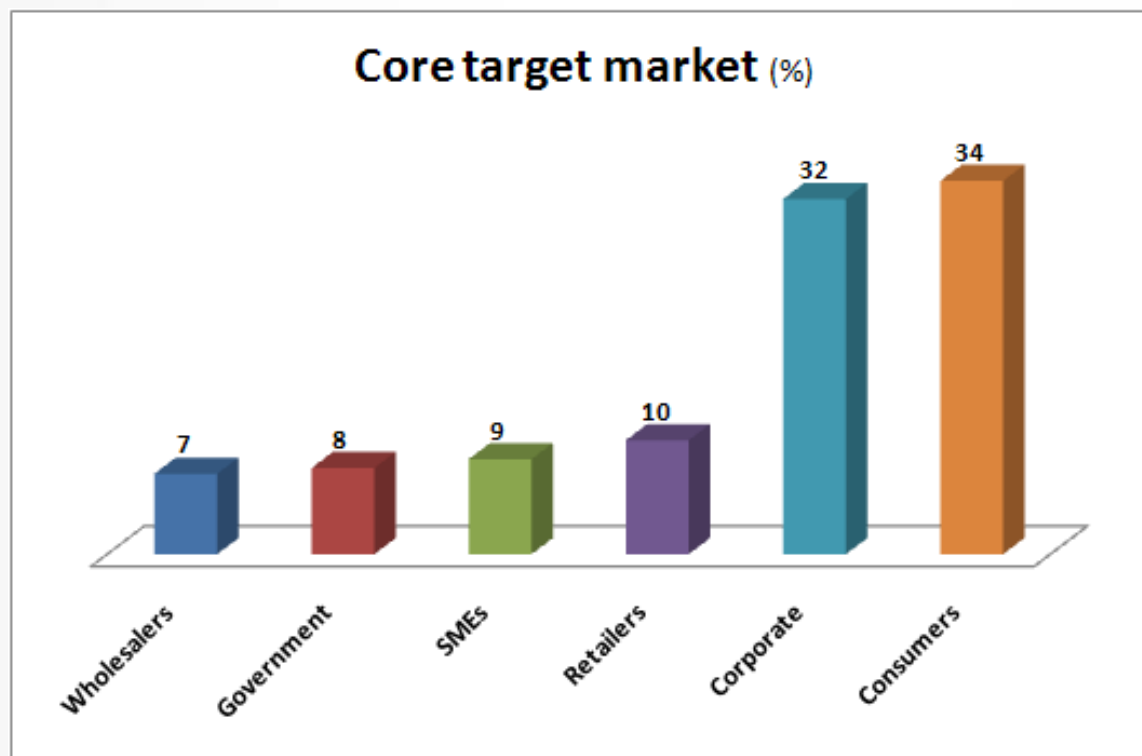
Strong entrepreneurial impulse



SME Survey 2009

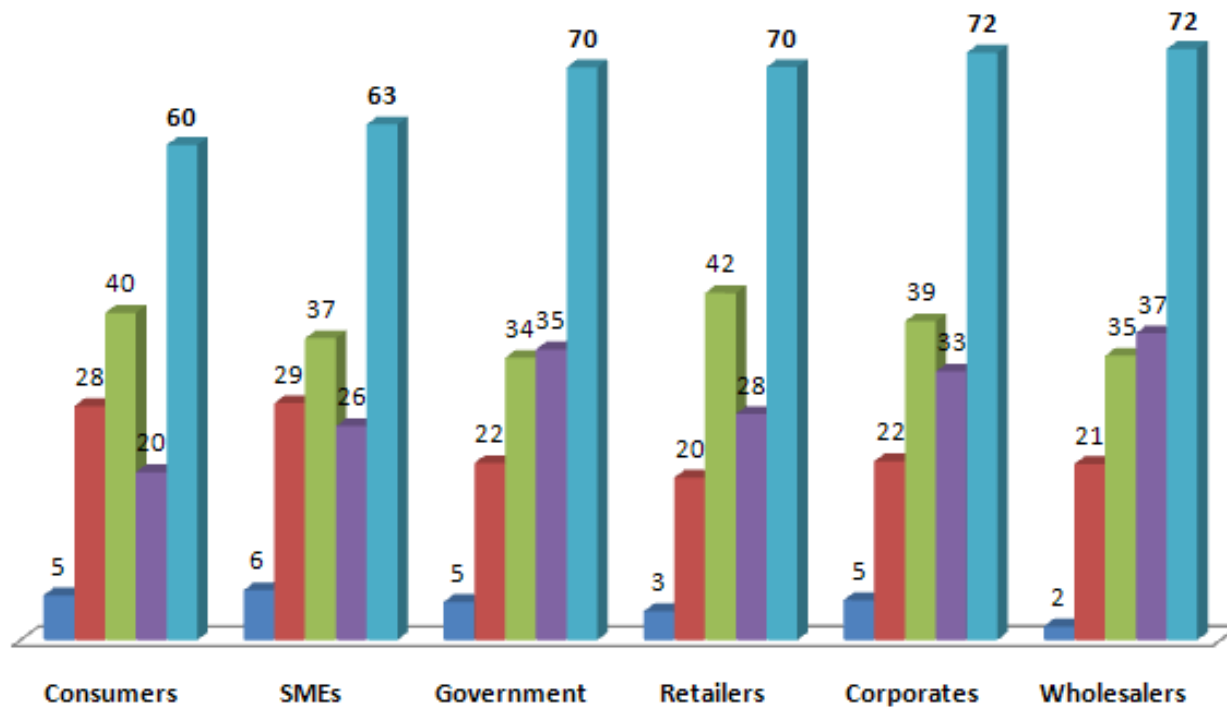


Exposed to the Recession

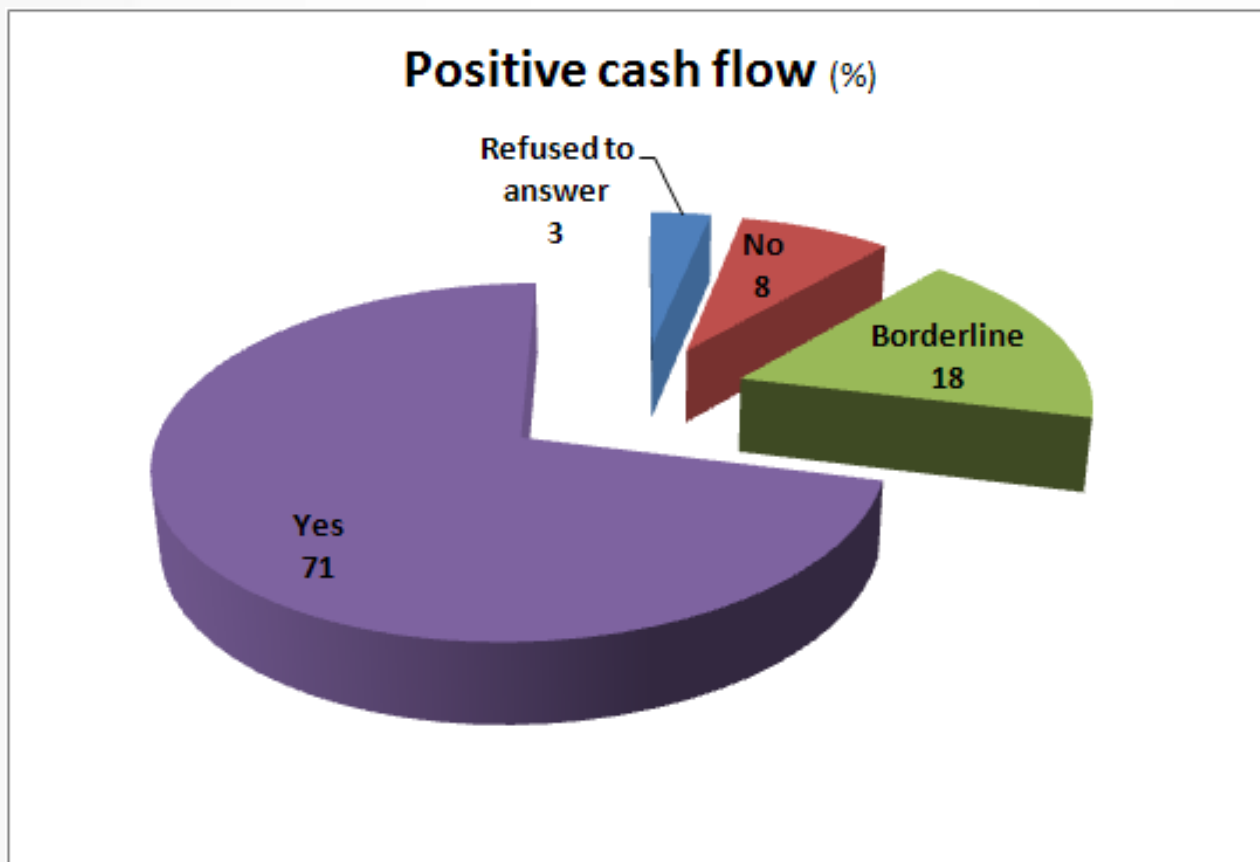


Target market vs profitability (%)

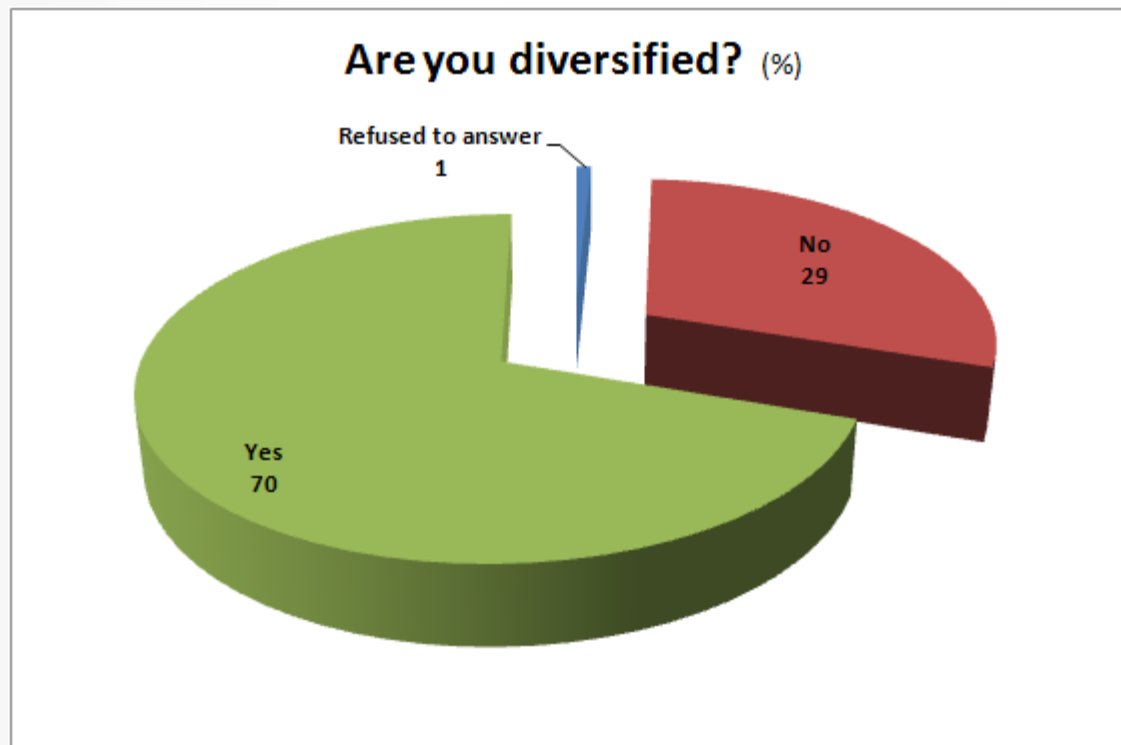
■ Not profitable
 ■ Breaking even
 ■ Just profitable
 ■ Strongly profitable
 ■ Overall profitable



But basic indicator is Positive

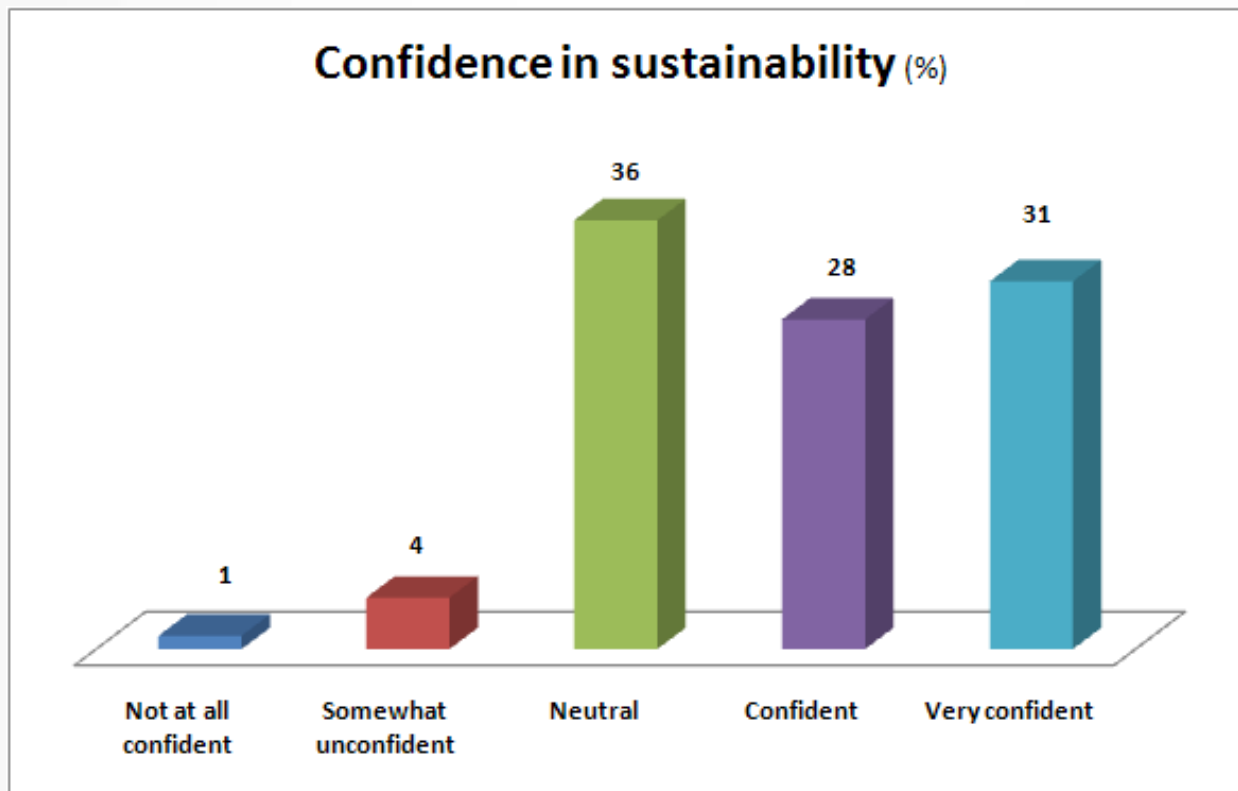


And the secret is clear

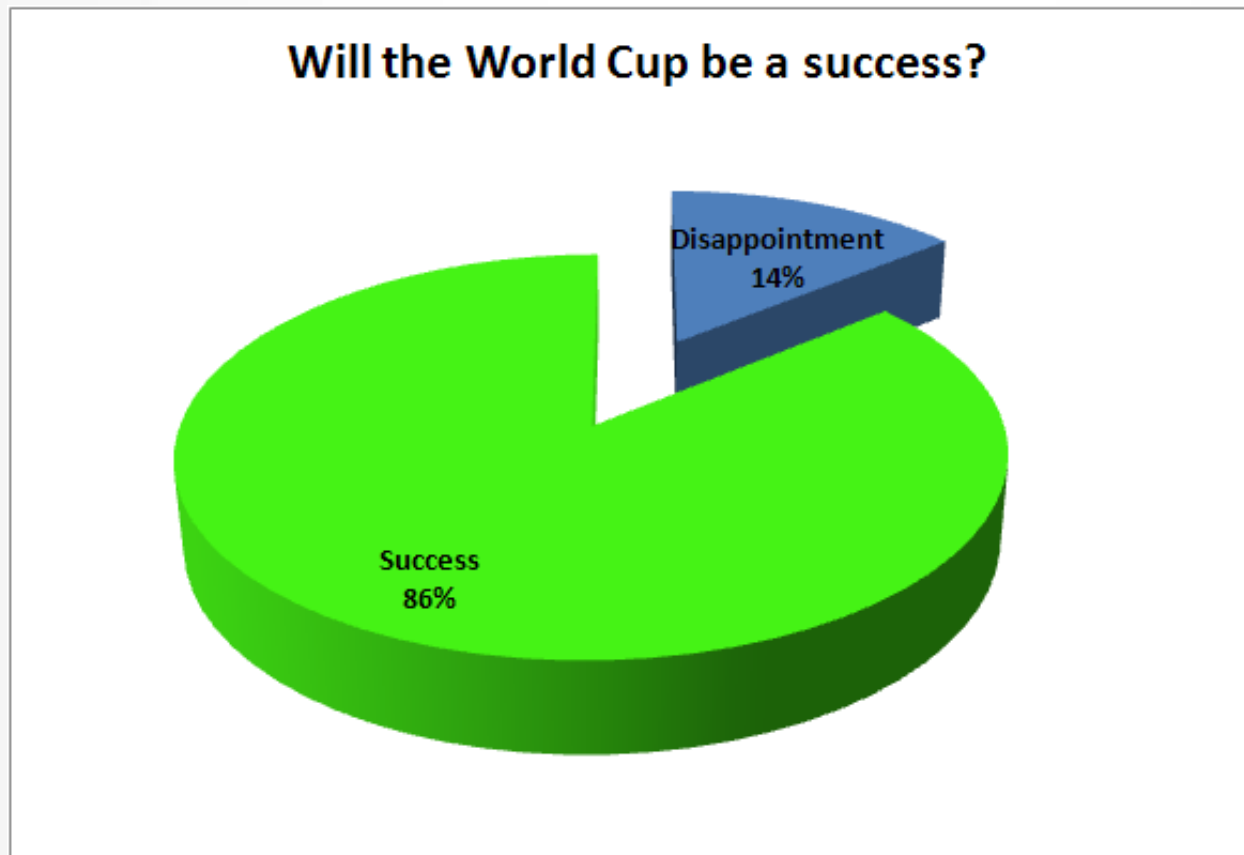


**Offer multiple products or services, operating in multiple industries,
with a wide range of customers**

But SME are not gung ho

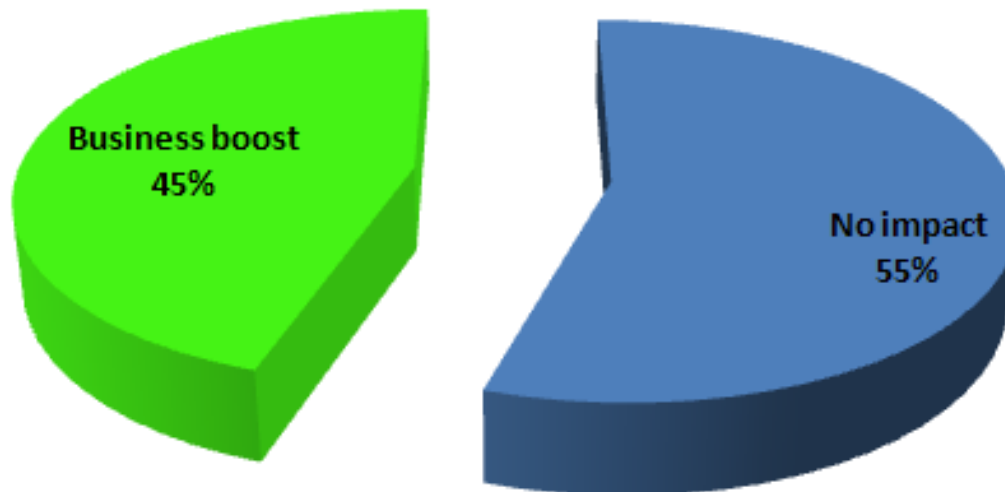


Will the World Cup save you?



FIFA fo fum

Will the World Cup boost your business?

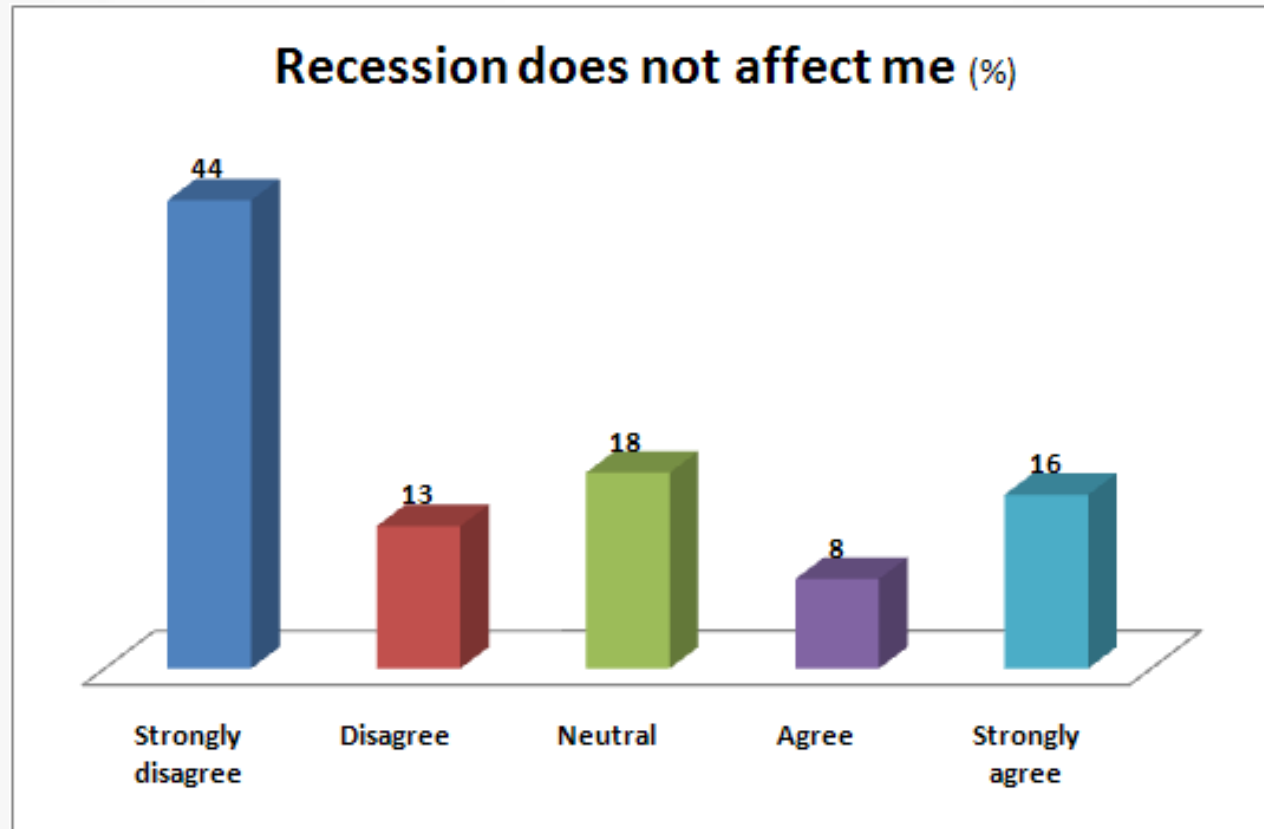


The five stages of Recession Grief

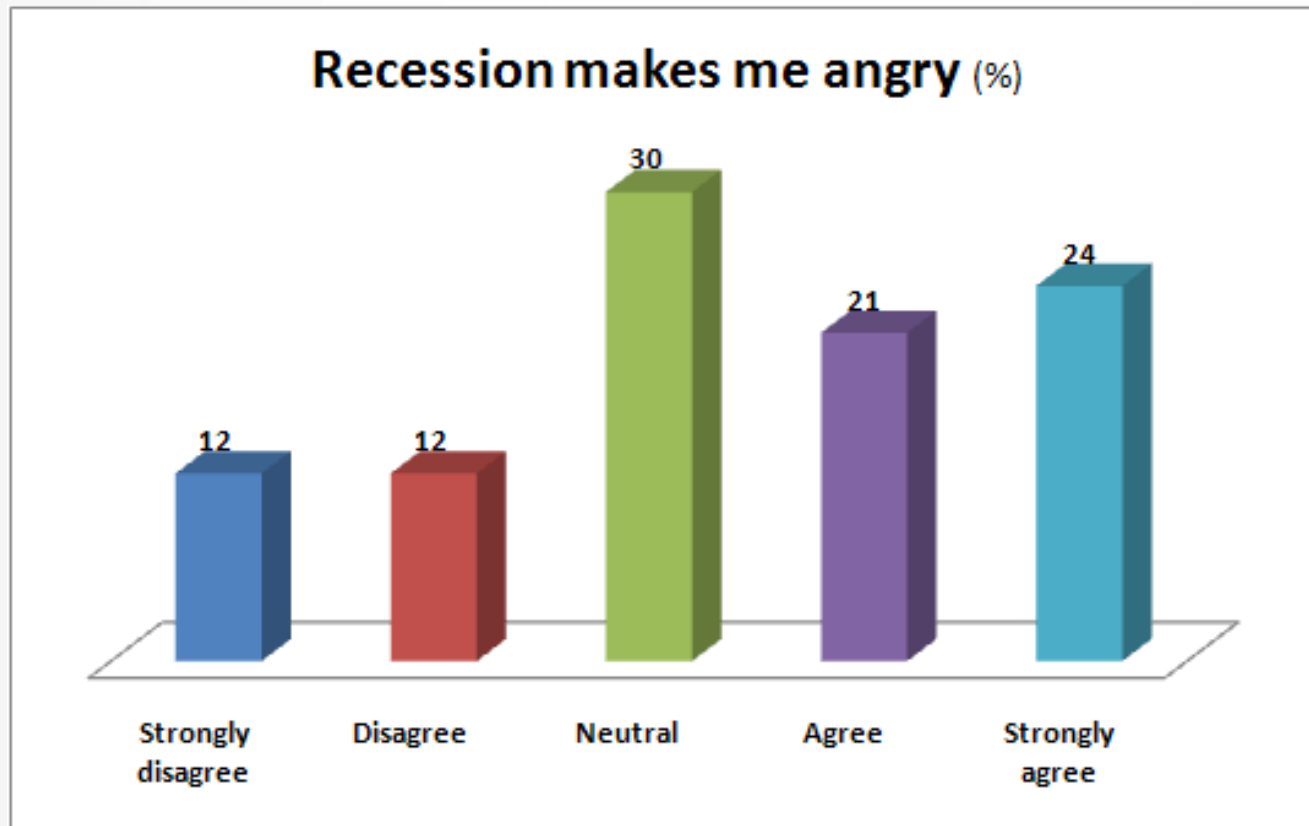
The traditional stages of grief

1. Denial
2. Anger
3. Bargaining
4. Depression
5. Acceptance

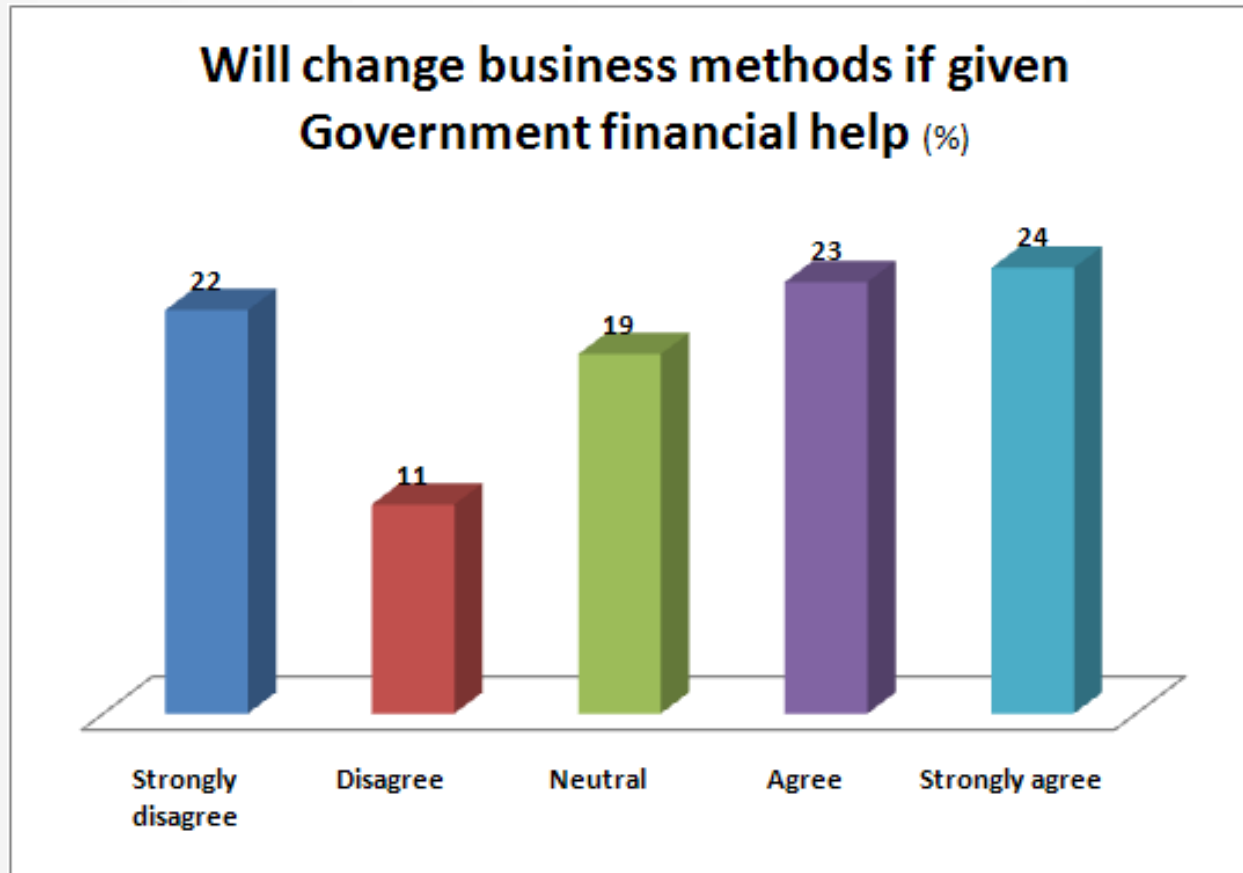
1. Recession Denial



2. Recession Anger

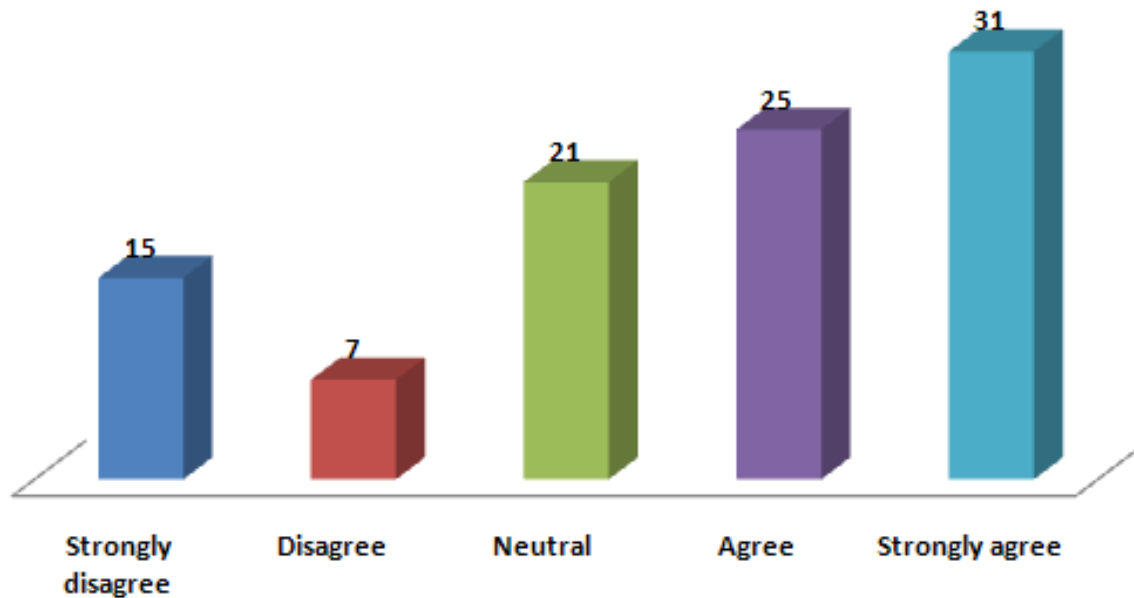


3. Recession Bargaining

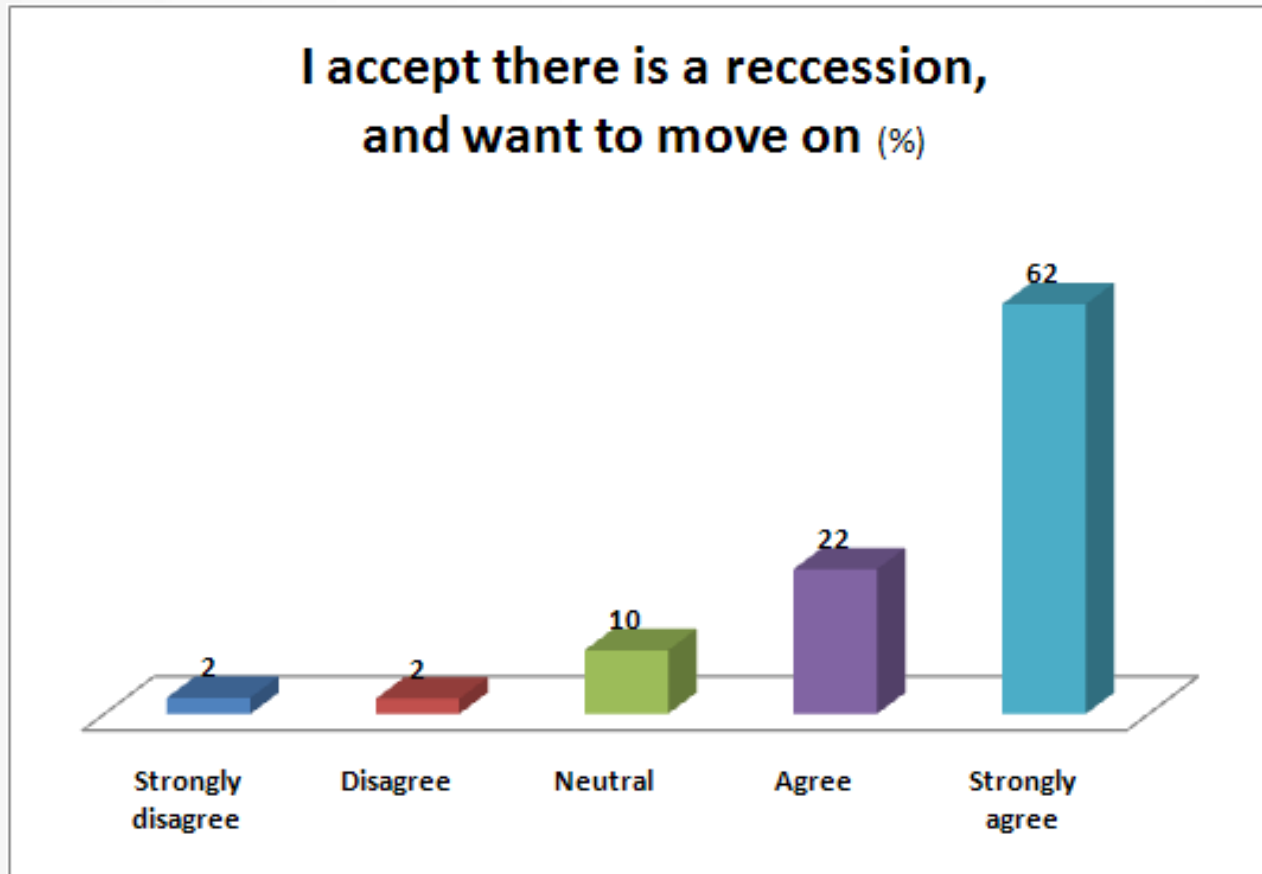


4. Recession Depression

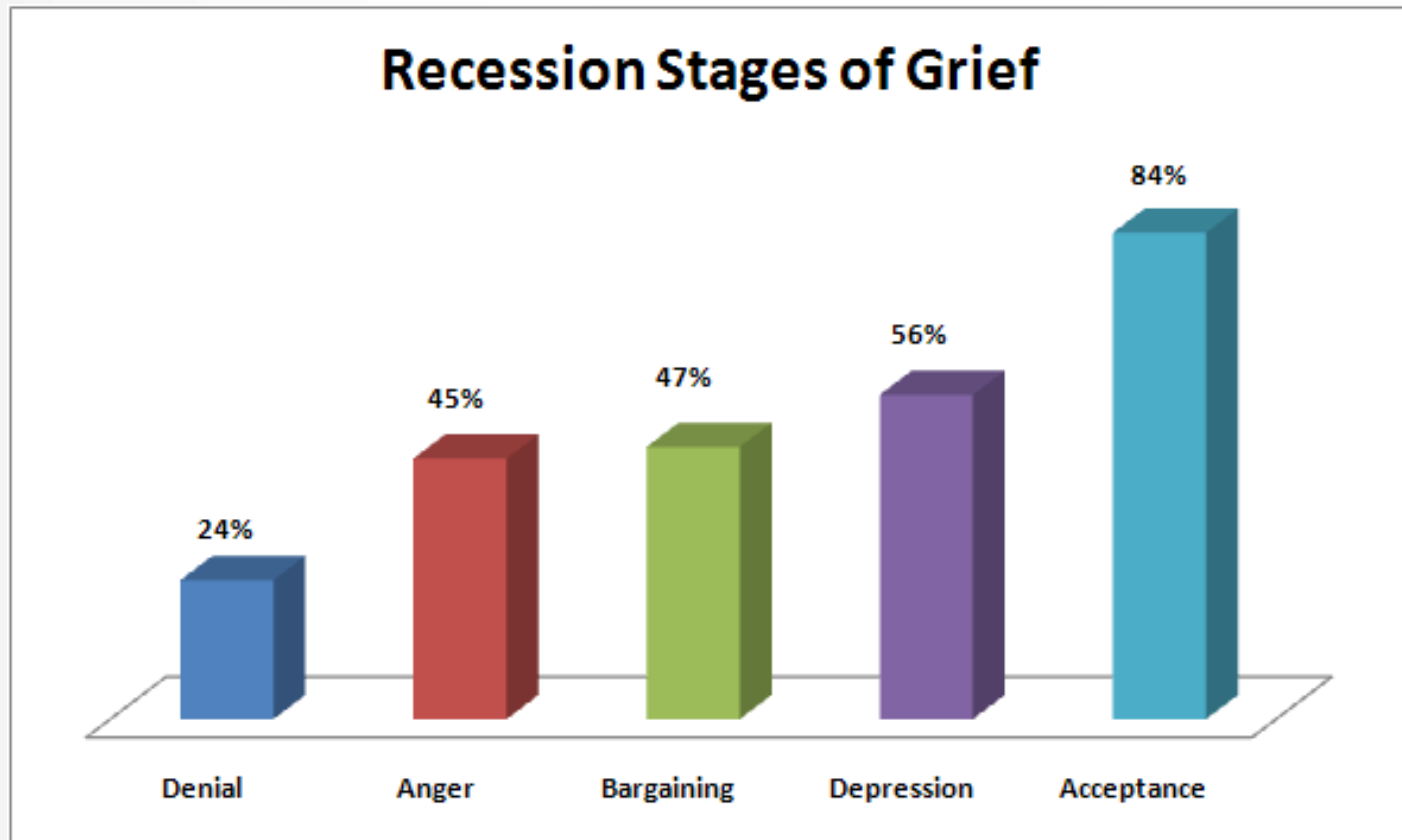
The recession depresses me, but
I will do something about it (%)



5. Recession Acceptance

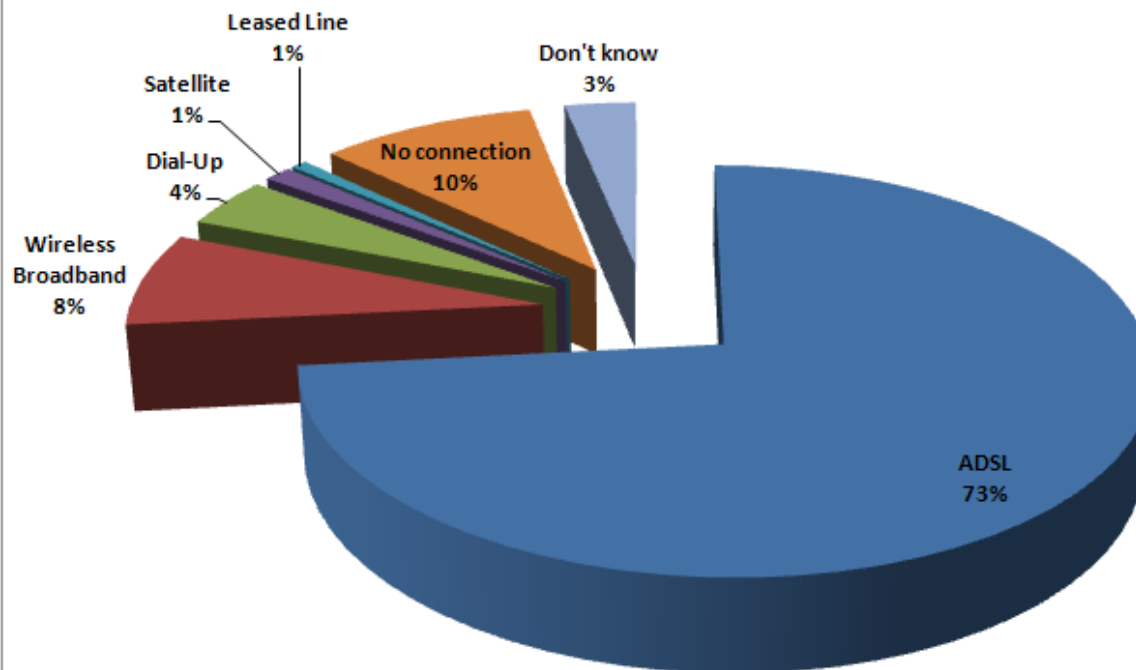


All aboard for the recovery

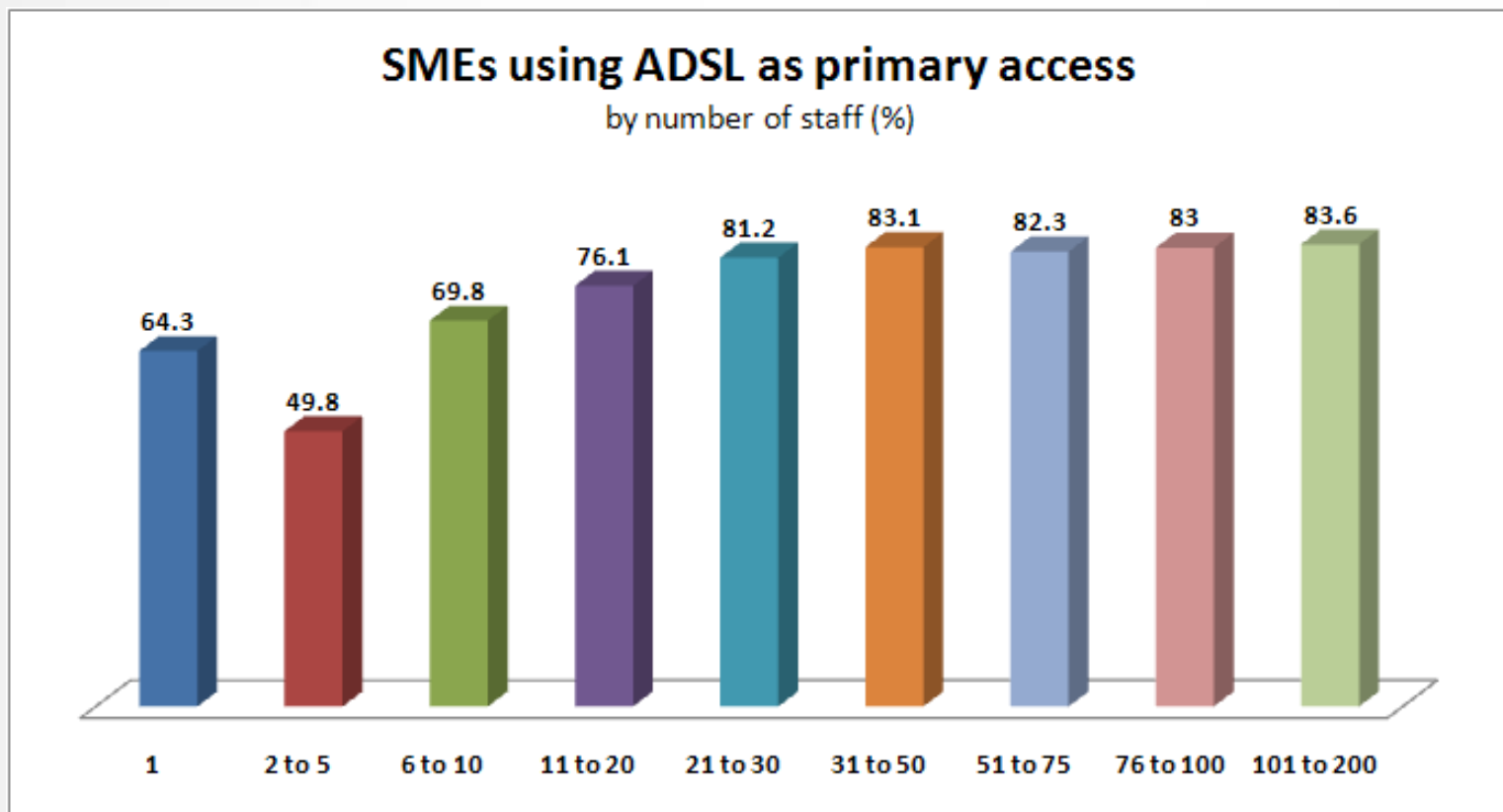


What can be done?

SMEs Internet connectivity 2009

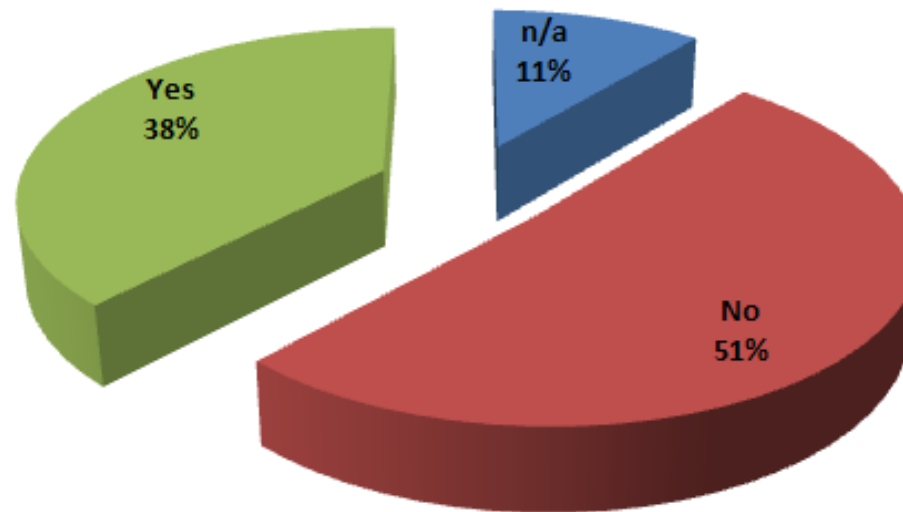


Invest in connectivity

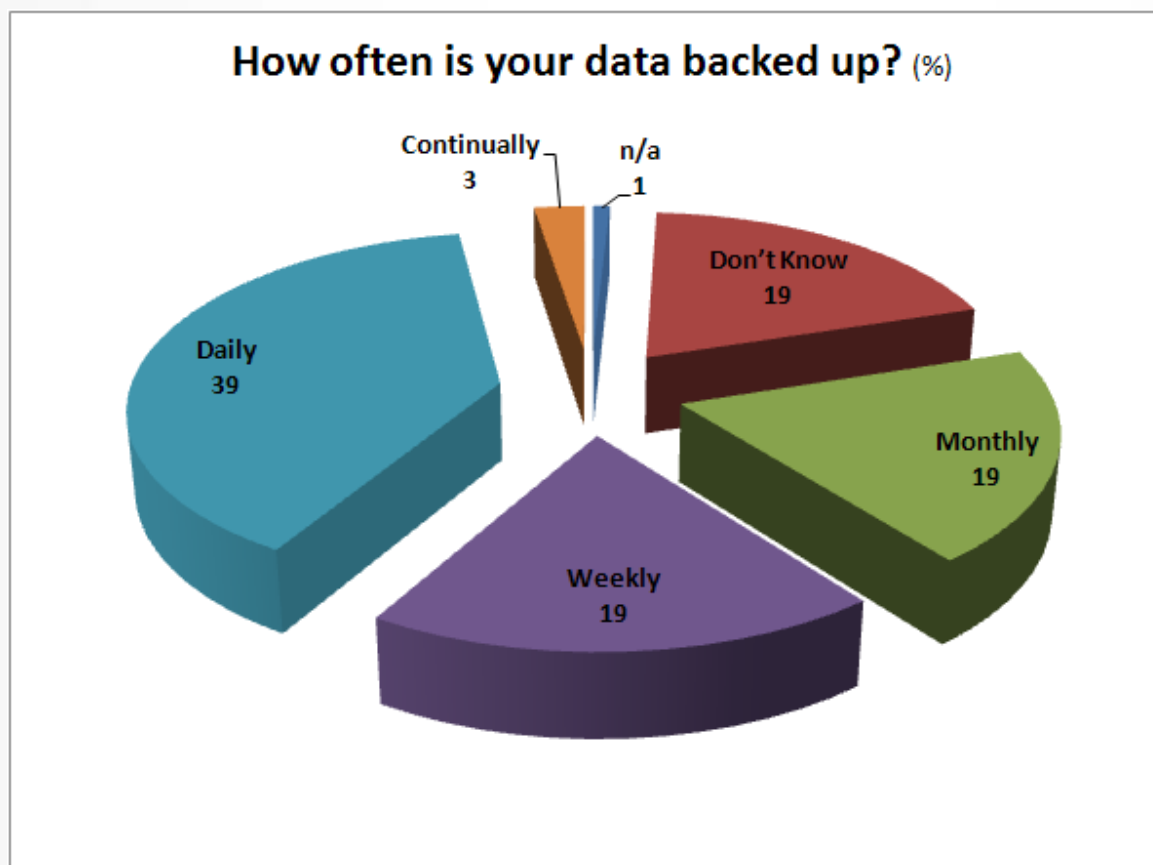


And back-up

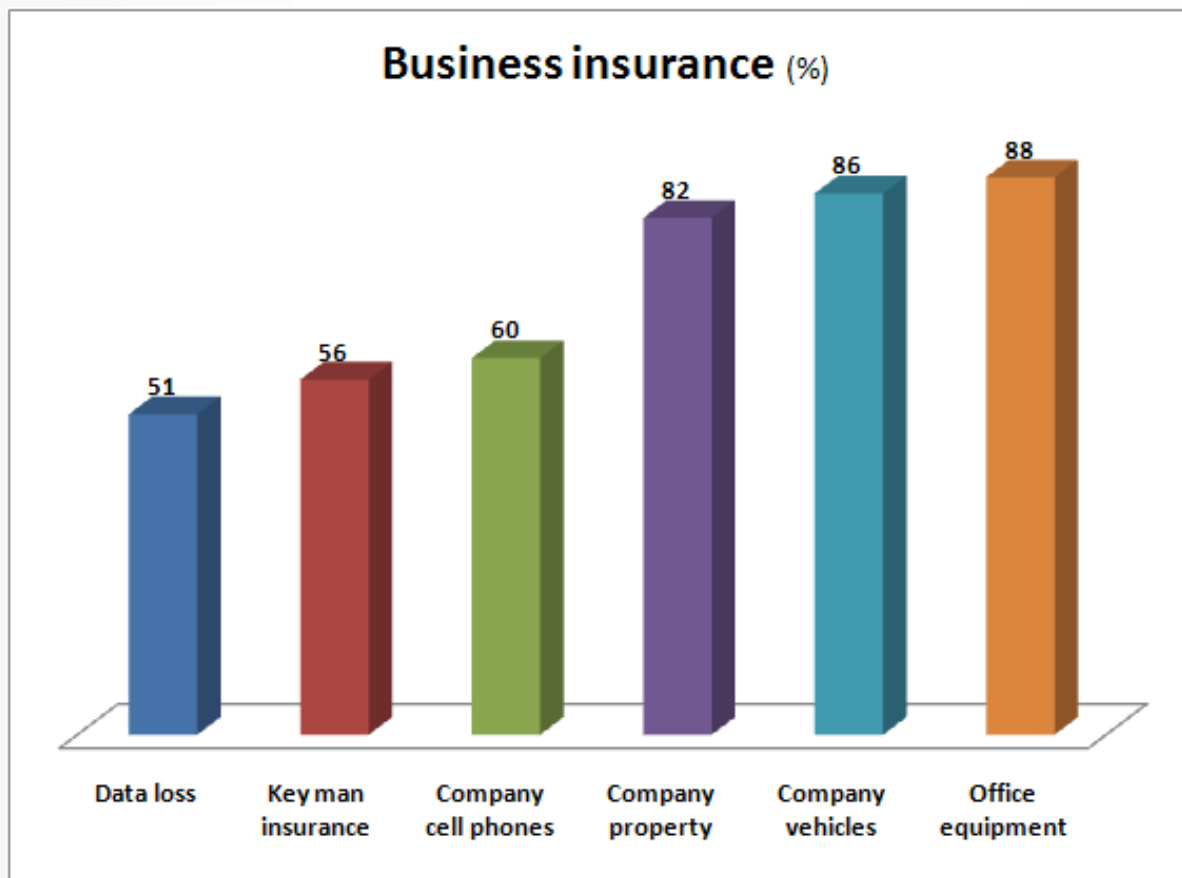
Do you also use a 3G card?



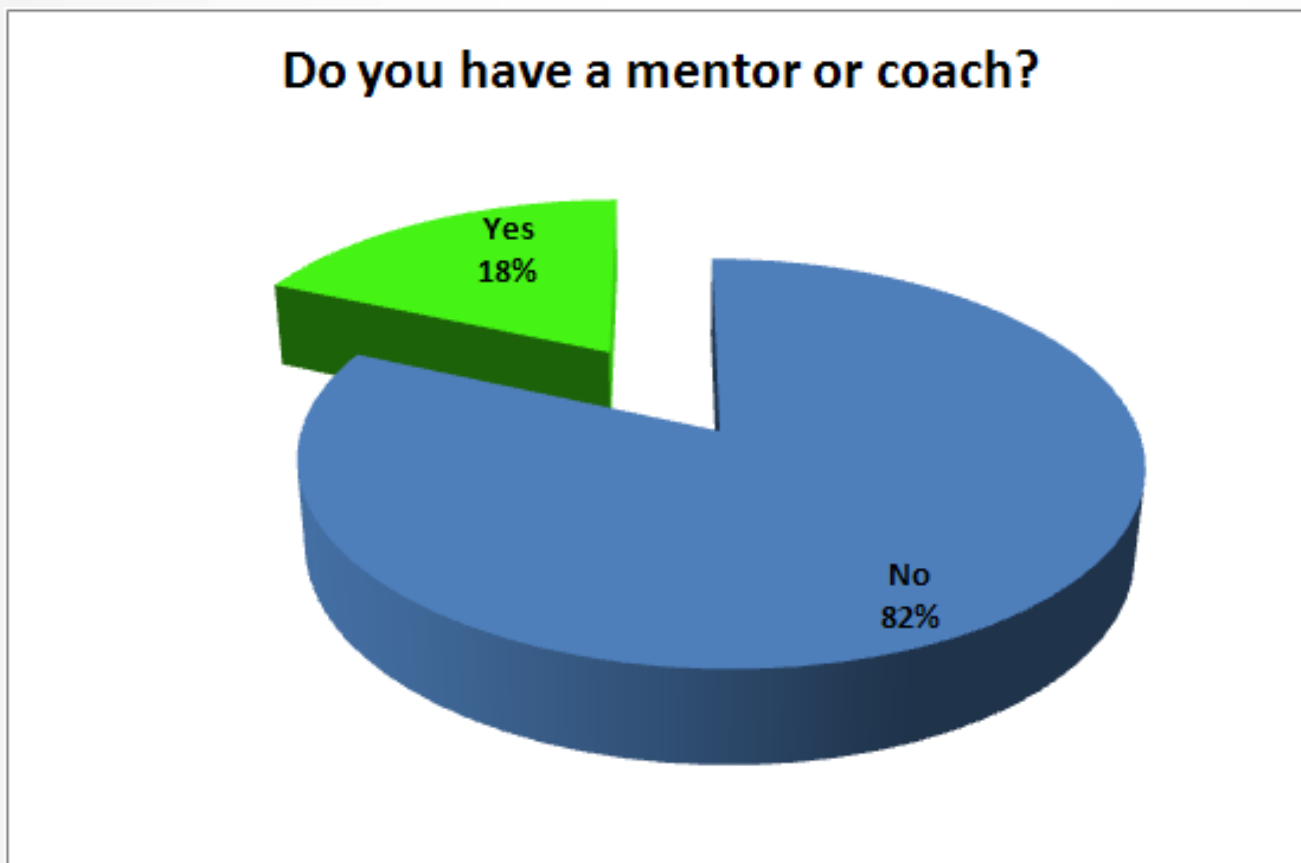
Not to mention your data



Don't neglect what matters most

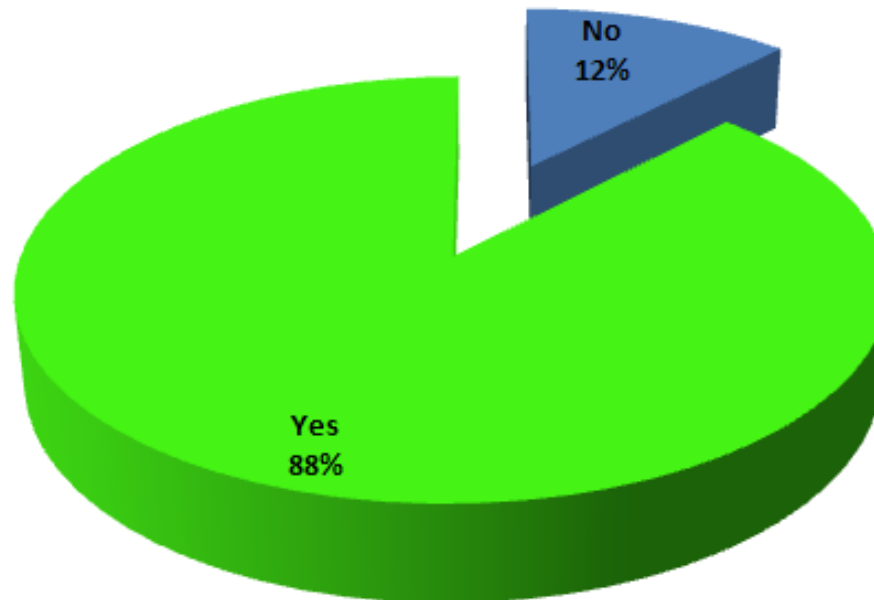


Can someone tell you what to do?



Oh yeah

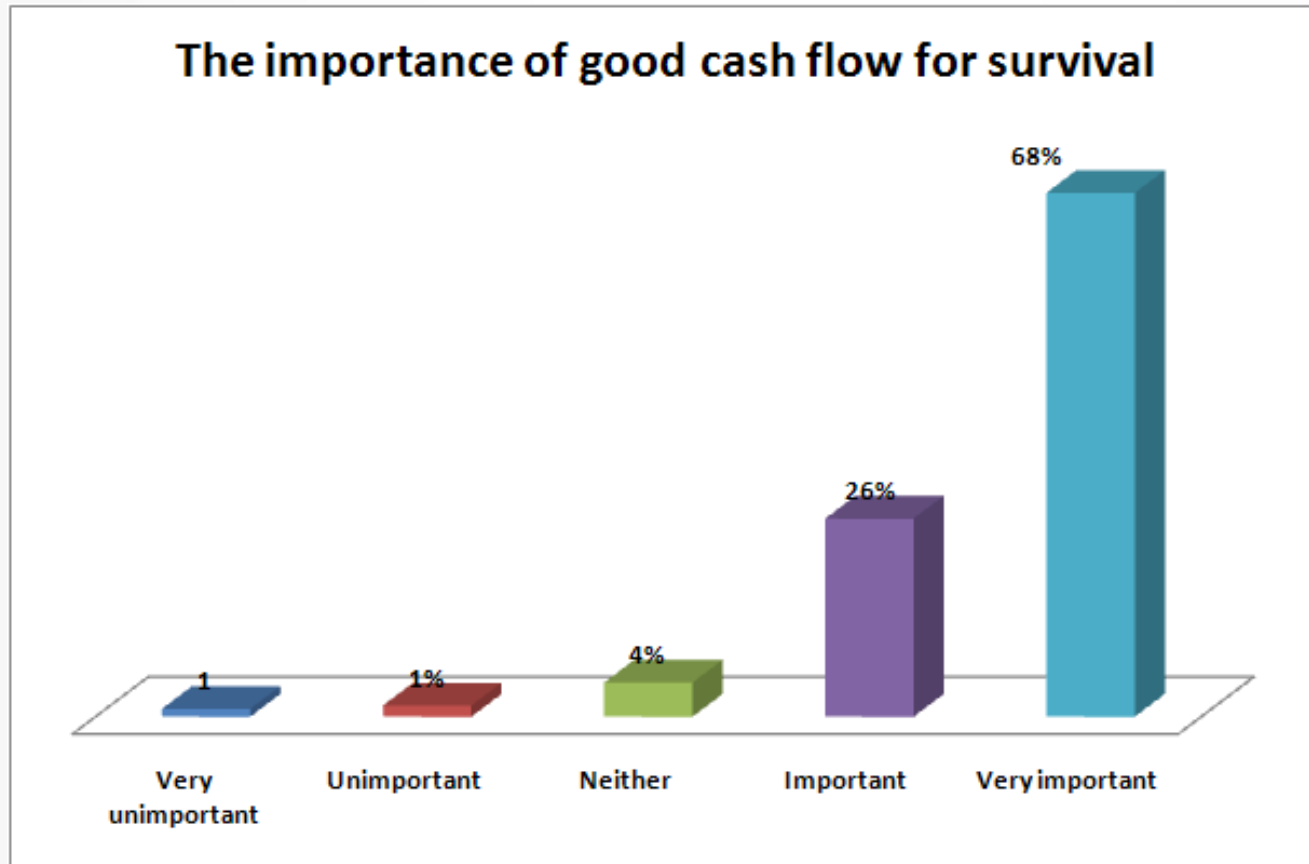
Has your coach added value to the business?



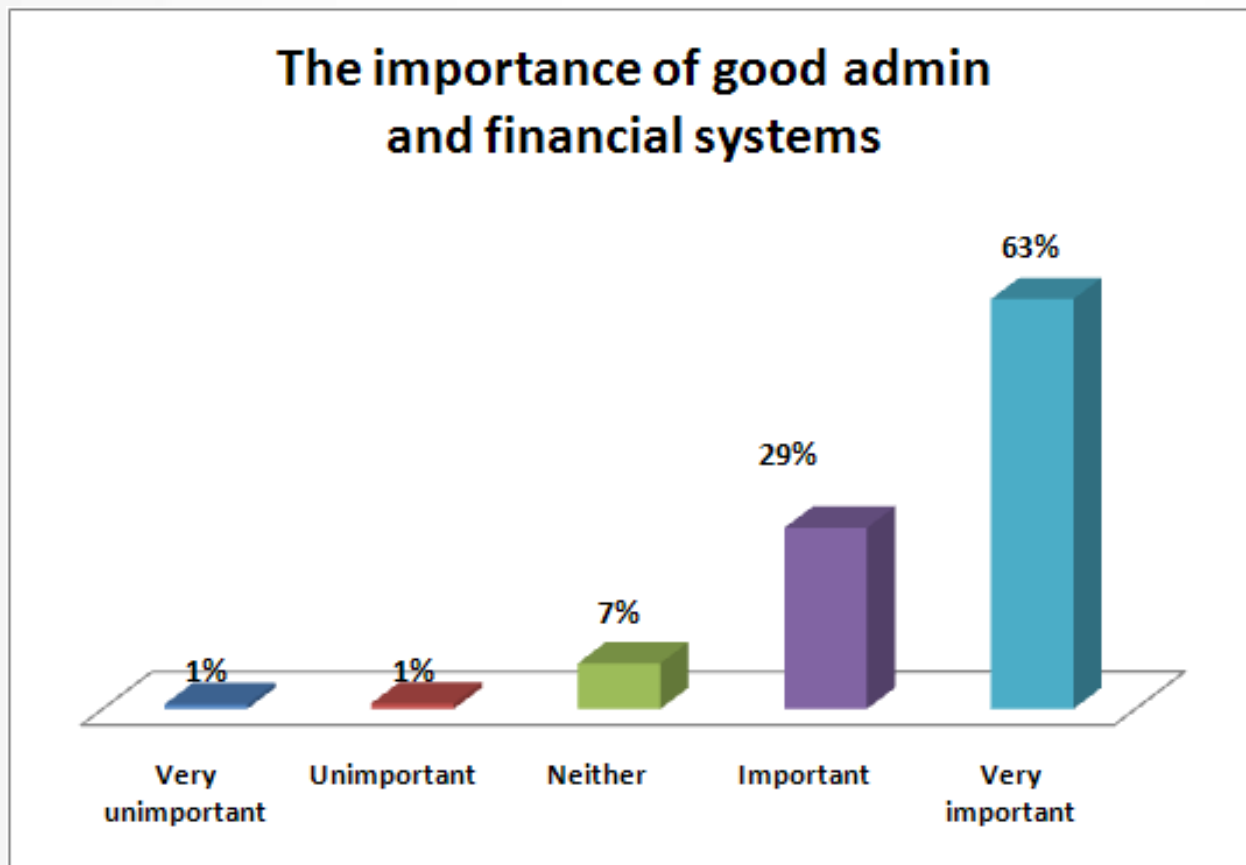


And then there is the blueprint

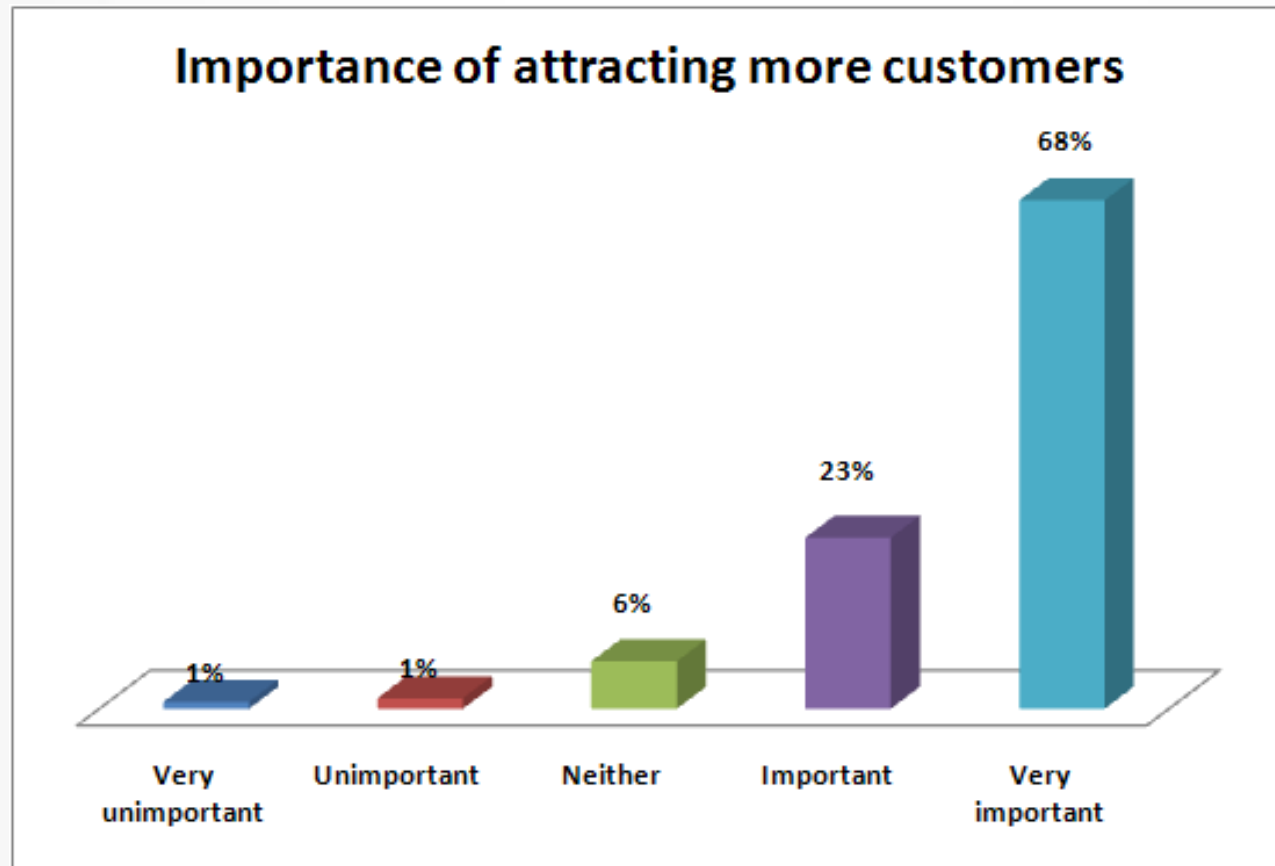
The smart money



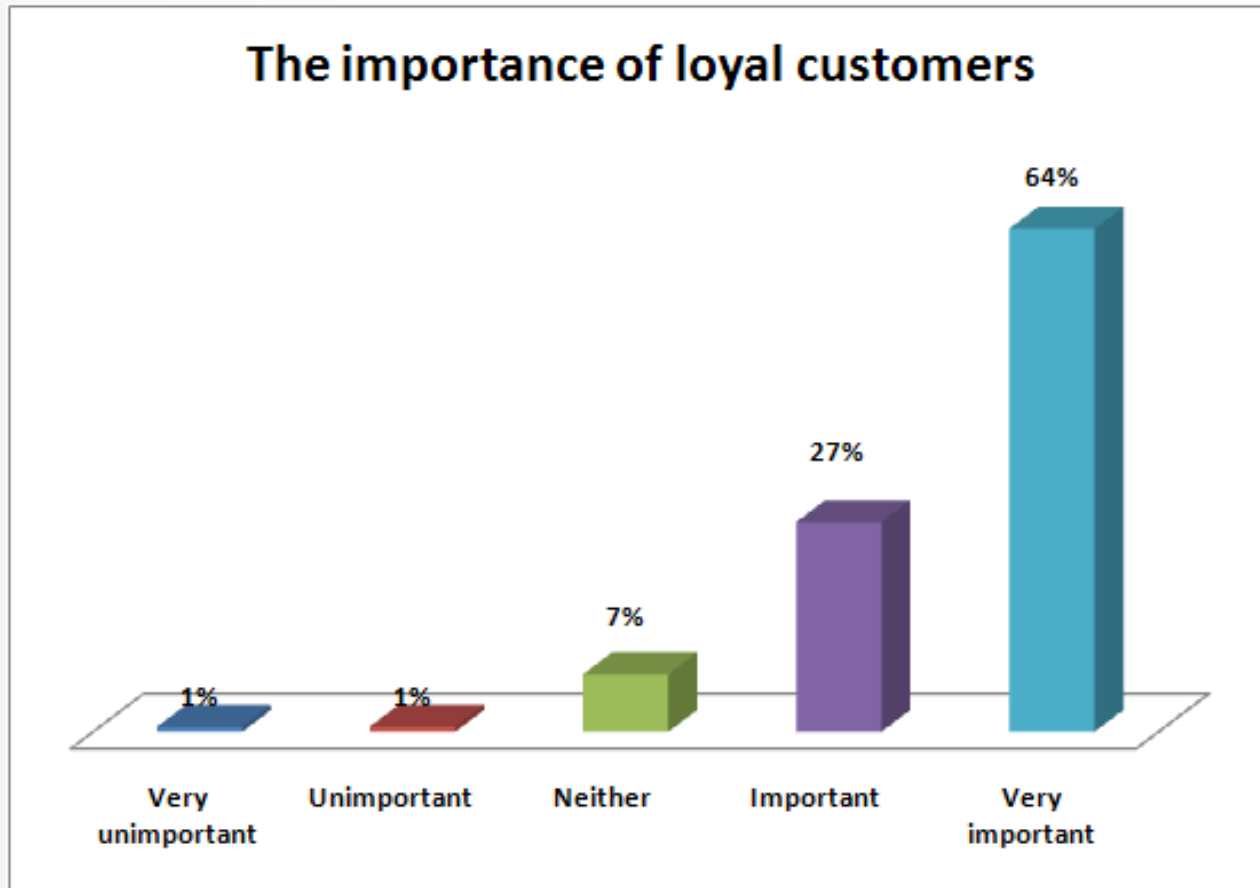
The smart business



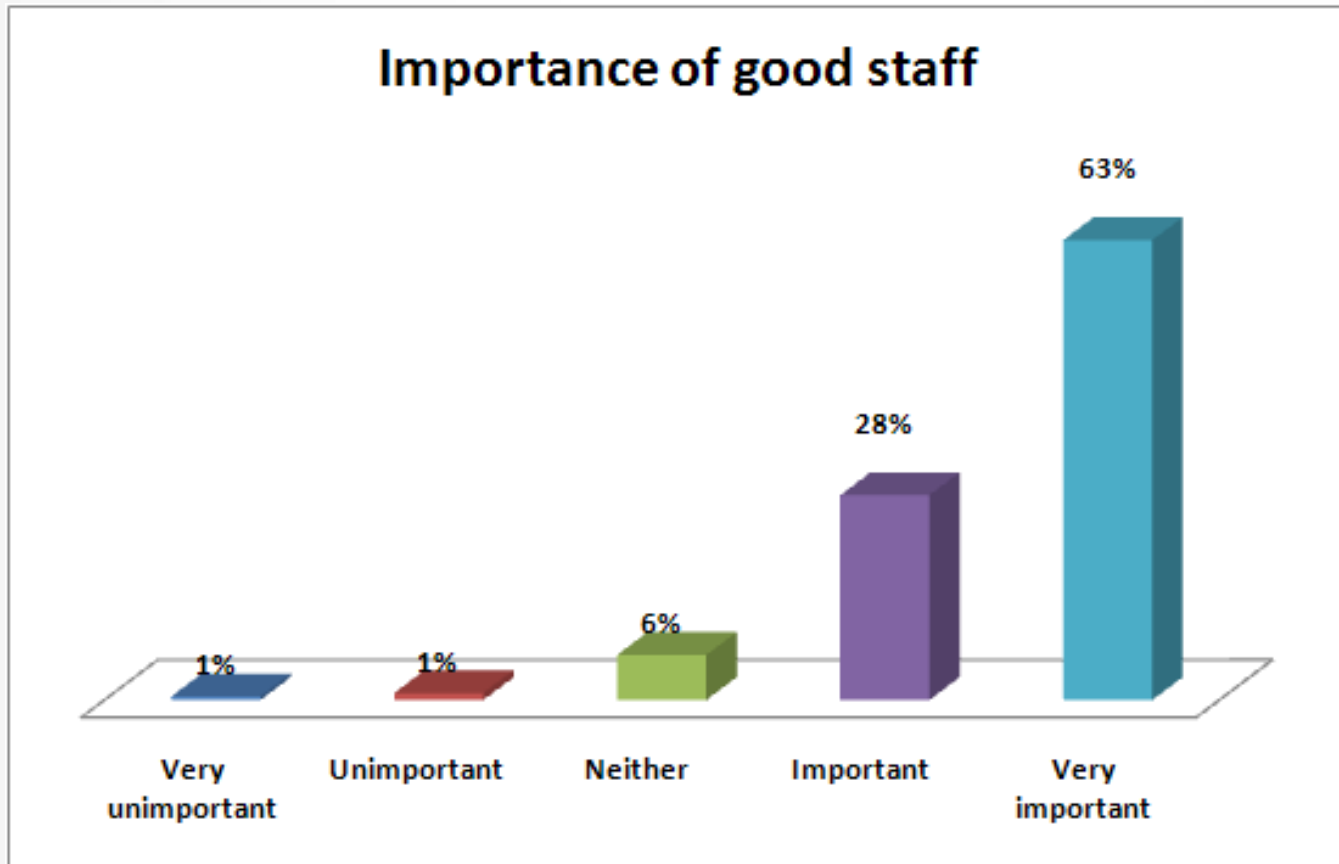
The popular business



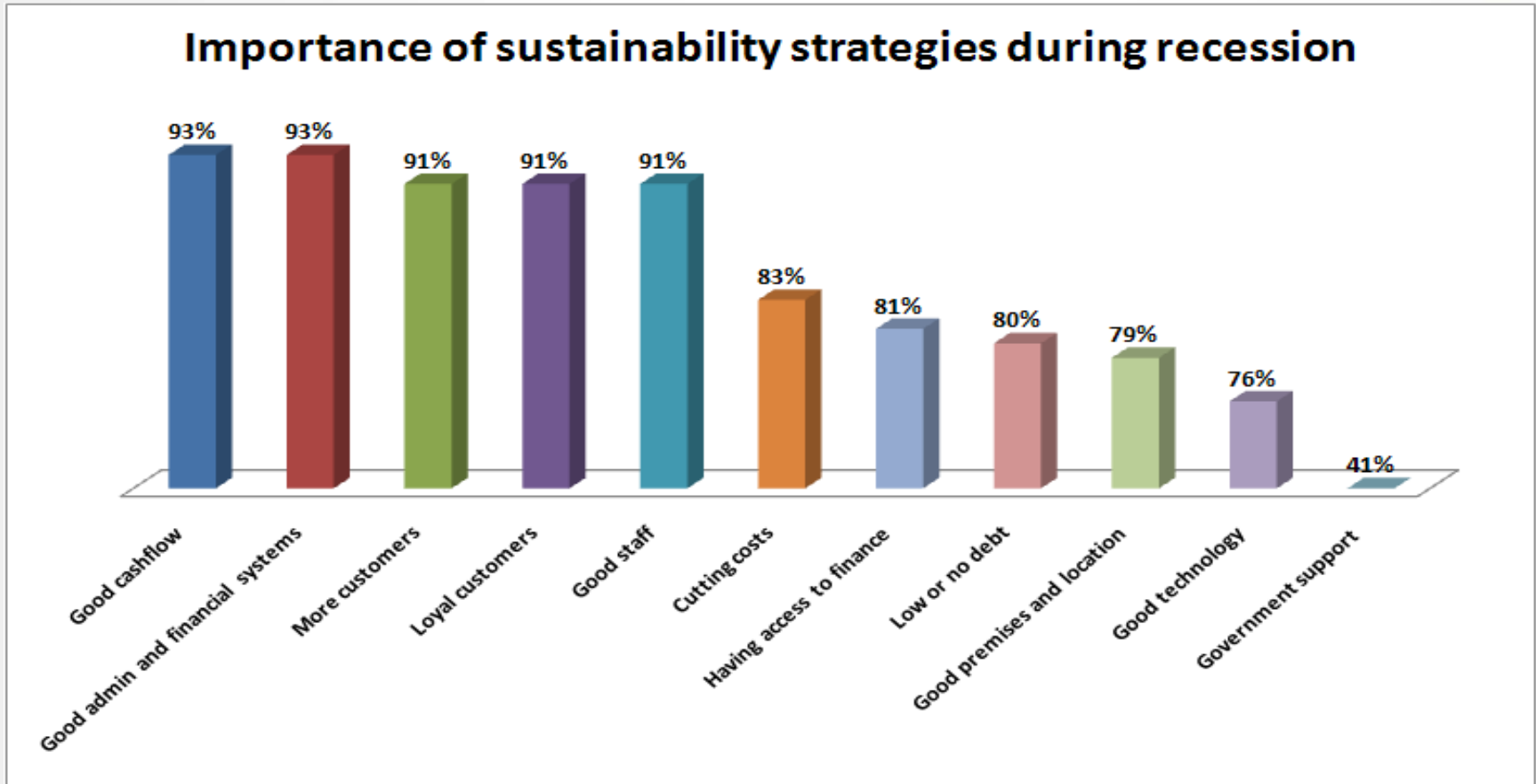
The business that delivers



The people who deliver



The blueprint for sustainability





Thank you!