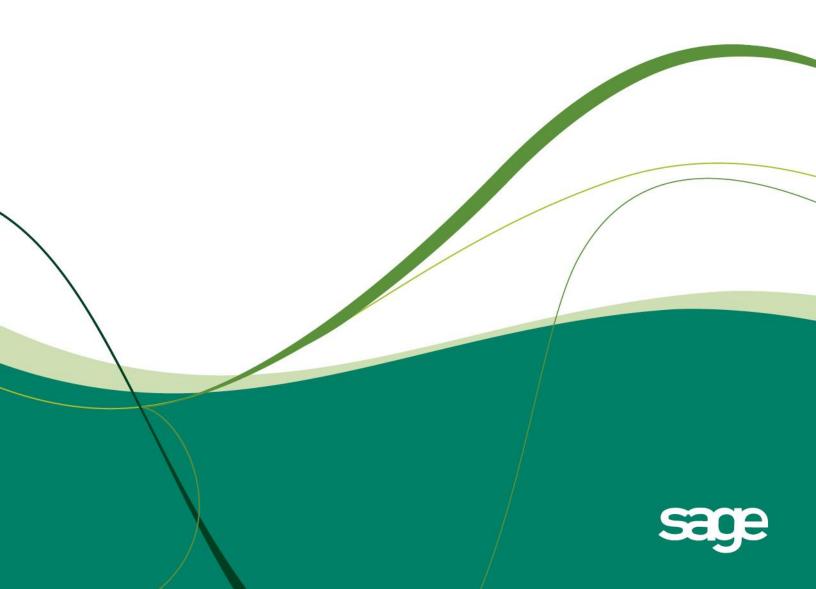


Sage SMB Hiring Outlook Survey 2013

Summary Report—North America Manufacturing



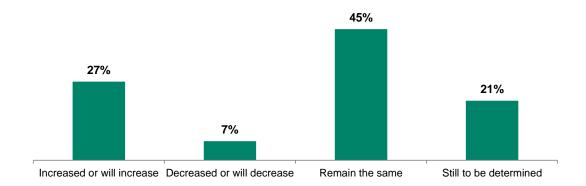
Introduction

<u>Sage North America</u> serves more than 6 million small and midsized organizations worldwide, regularly surveying them and other organizations for their opinions on a variety of business topics. This particular survey examined the hiring outlook of North American manufacturing-focused small and midsized businesses (SMB) in 2013.

Workforce Size

More SMB manufacturers said their workforce will increase in 2013 than said it will decrease.

Size of Workforce in 2013 Among Manufacturing Employers, 1-99 Employees (N=242)

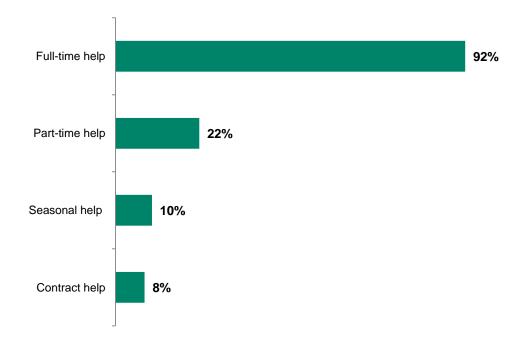


Hiring Plans

Most SMB manufacturers that are hiring in 2013 are bringing on full-time help. About two in ten are hiring part-time help.

Type of Employees Being Hired

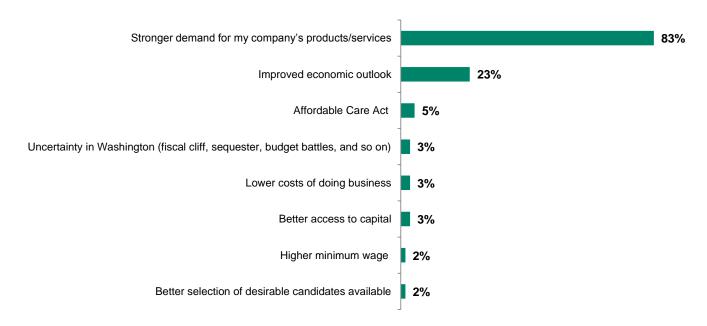
(Base: Hired or Will Hire in 2013, N=104)



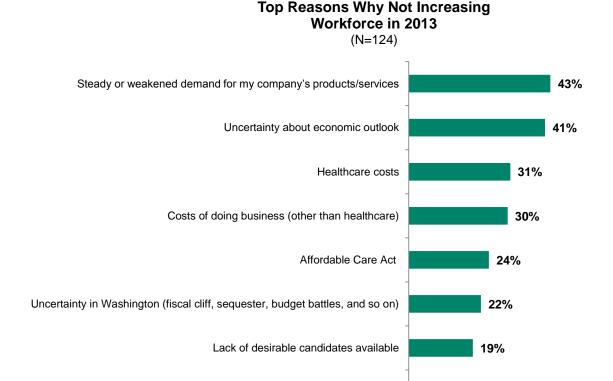
Forces Driving Hiring Plans

Stronger demand for products and services tops the list of reasons SMB manufacturers are increasing the size of their workforce. Ranked second is an improved economic outlook.

Top Reasons Why Increasing Workforce in 2013 (N=66)



Leading the list of reasons SMB manufacturers are not hiring are steady or weak demand for products/services, economic uncertainty, healthcare costs, and costs of doing business.



Access to capital

Higher minimum wage

6%

5%

About the Survey

The survey was conducted by Sage during May 2013 among Sage customers in the U.S. and Canada who are manufacturing businesses with fewer than 100 employees. A total of 242 people completed the web-based survey. The margin of error is +/- 7% with a confidence level of 95 percent.

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