

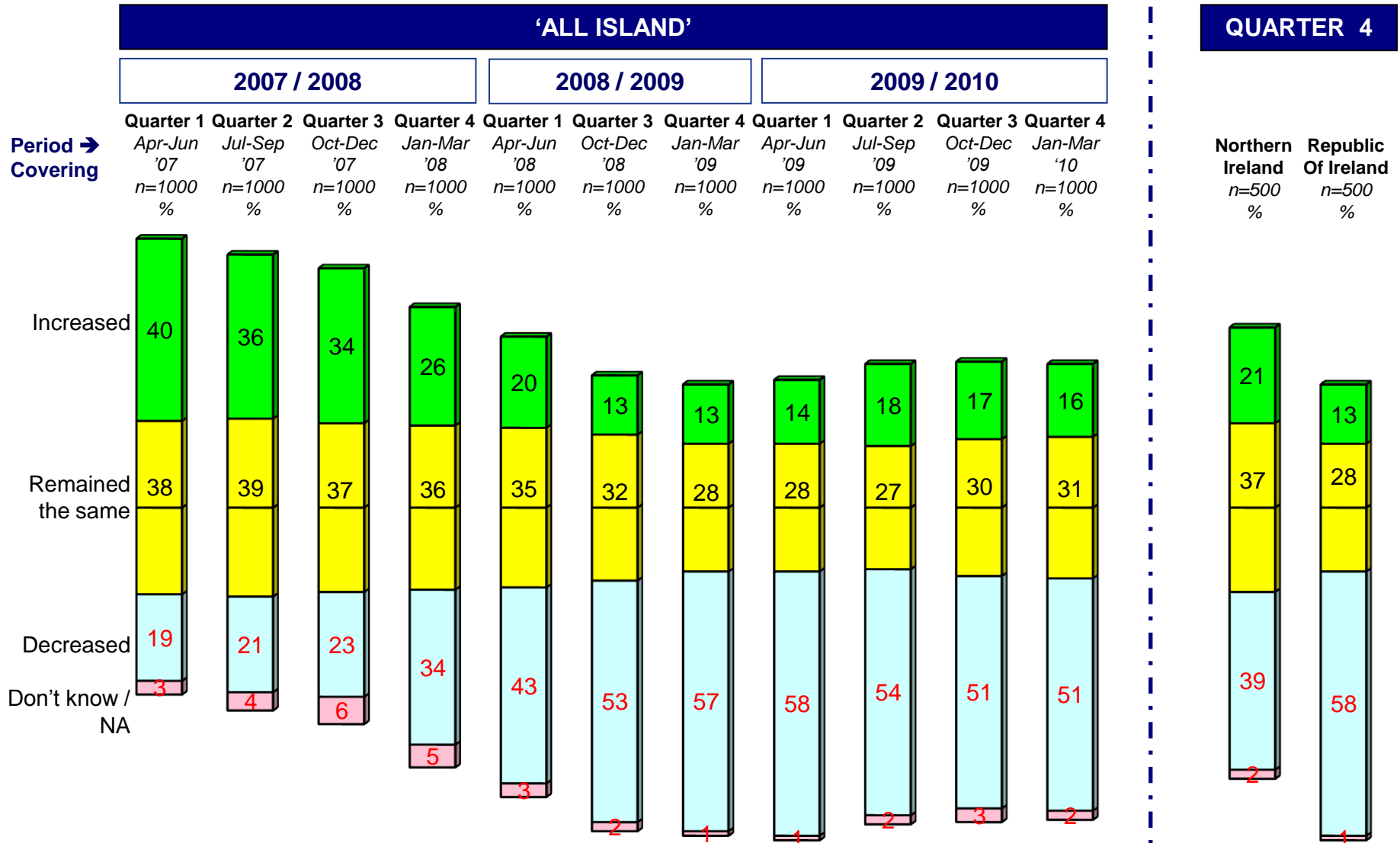


MillwardBrownUlster

InterTradeIreland Quarterly Business Monitor April 2010

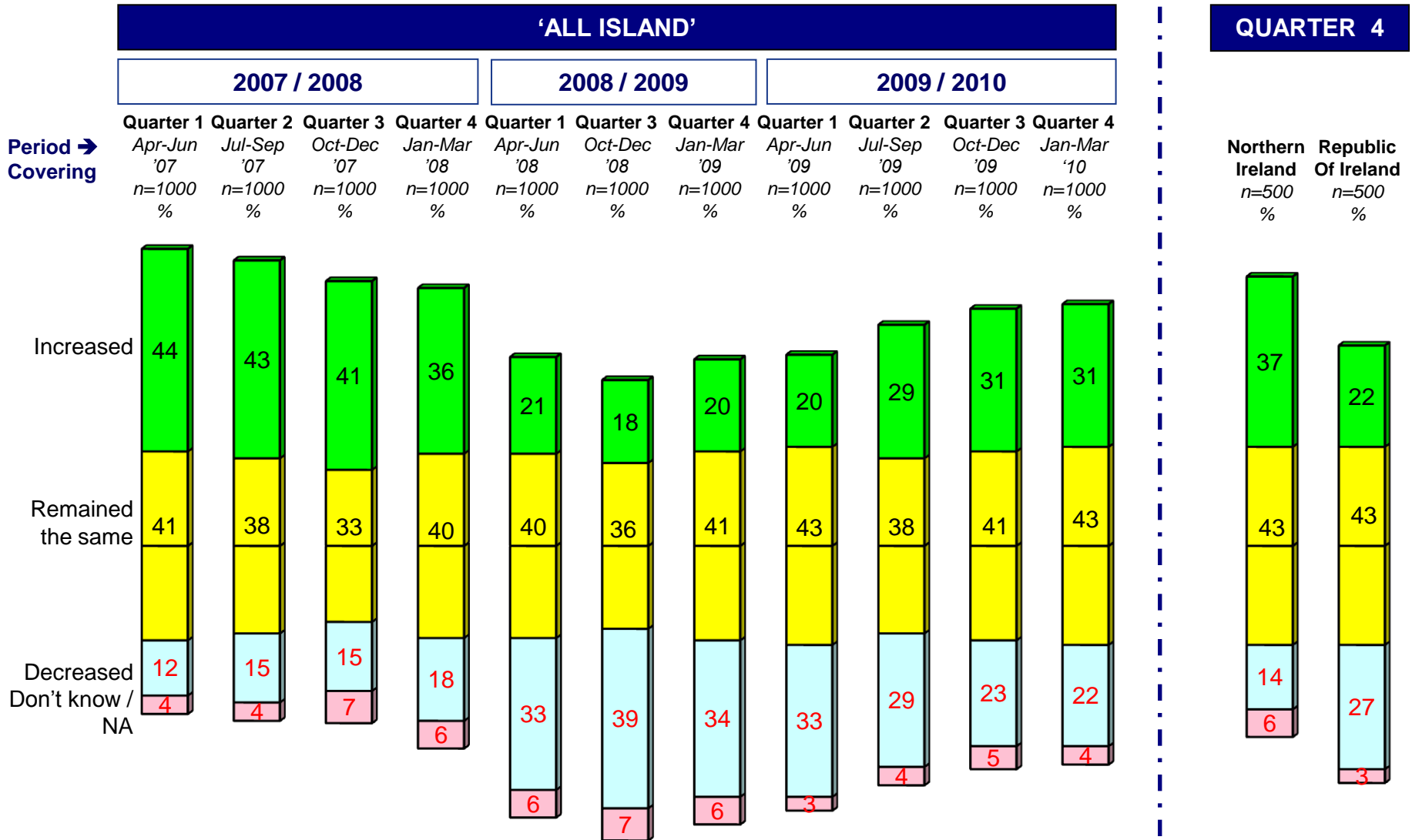
'All Island' – Business Turnover Over The Past Quarter

[Base: All Iol Respondents – n=1000 per quarter]



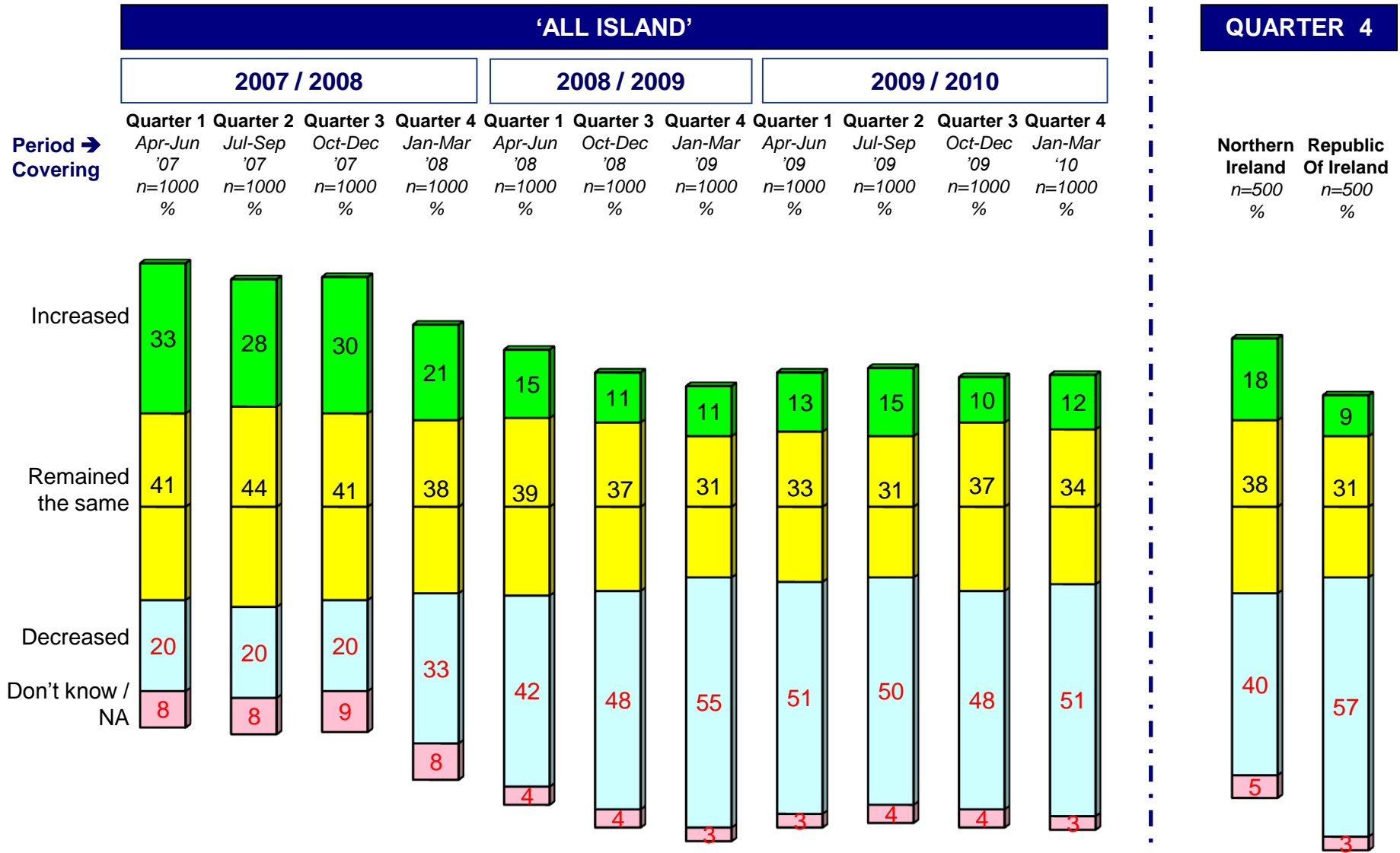
'All Island' – Expectations For Business Turnover Over The Next Quarter

[Base: All Iol Respondents – n=1000 per quarter]



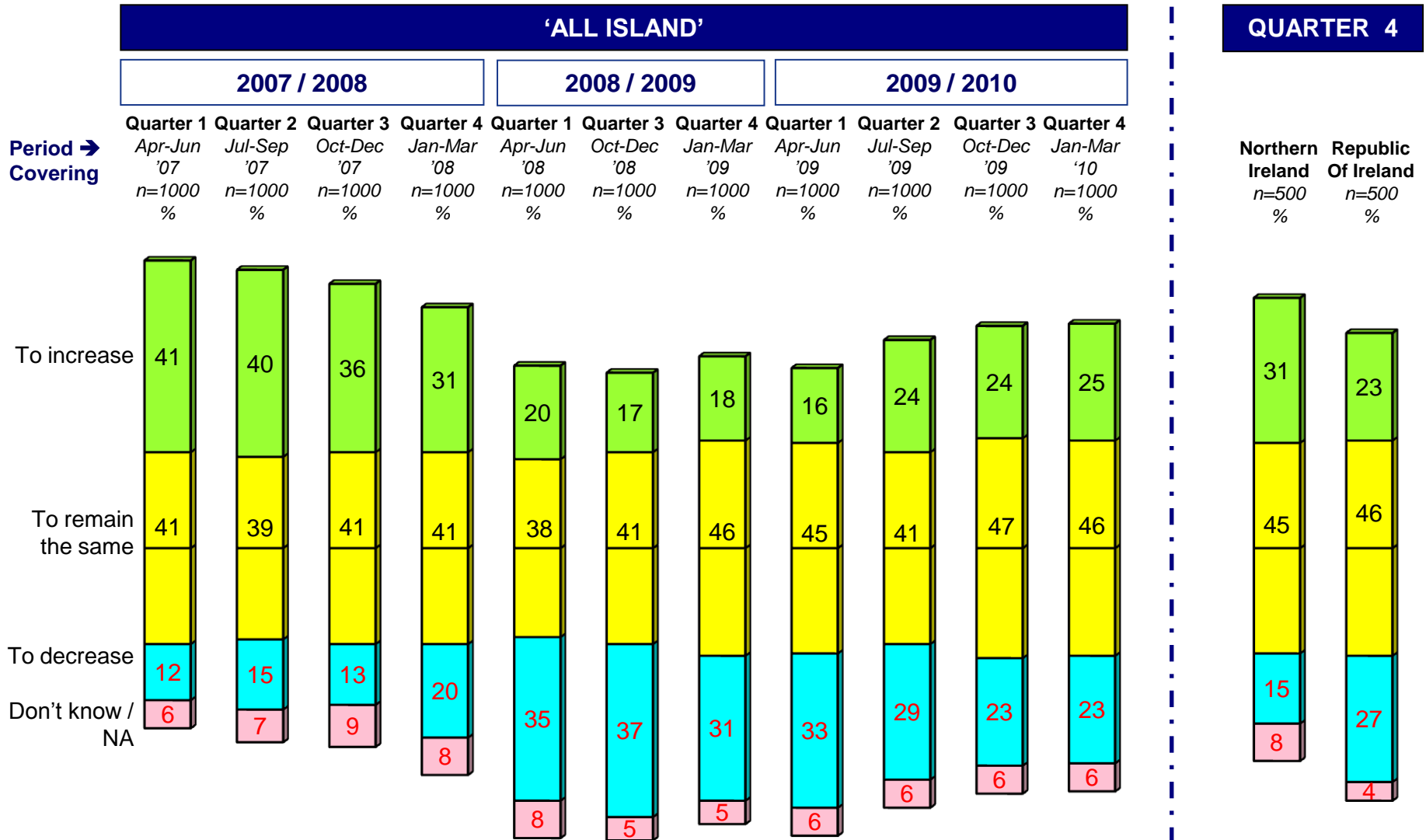
'All Island' – Business Profitability Over The Past Quarter

[Base: All Iol Respondents – n=1000 per quarter]



'All Island' – Expectations For Business Profitability Over The Next Quarter

[Base: All Iol Respondents – n=1000 per quarter]



'All Island' – Number Of Employees Over The Past Quarter

[Base: All Iol Respondents – n=1000 per quarter]

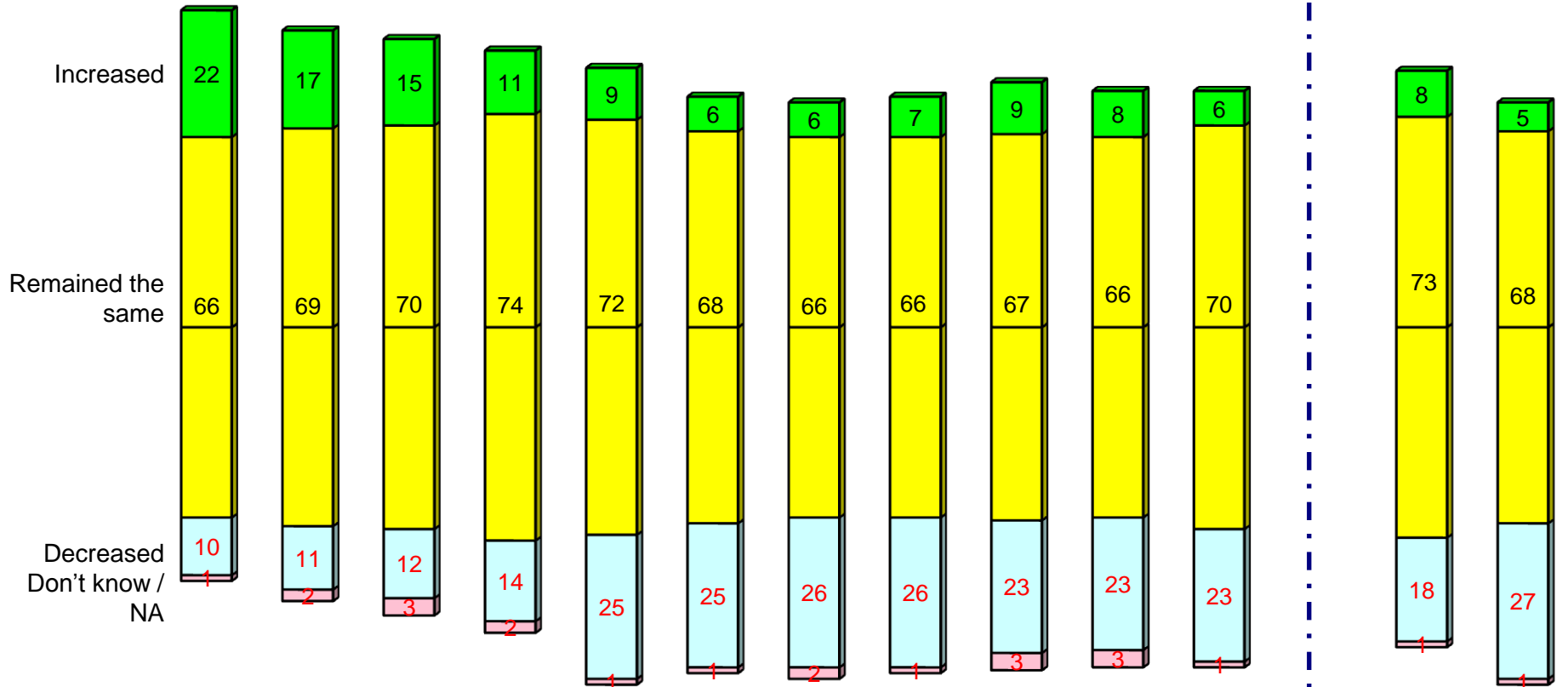
'ALL ISLAND'											
2007 / 2008				2008 / 2009			2009 / 2010				

QUARTER 4

Period →
Covering

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Quarter 1	Quarter 3	Quarter 4	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Apr-Jun '07	Jul-Sep '07	Oct-Dec '07	Jan-Mar '08	Apr-Jun '08	Oct-Dec '08	Jan-Mar '09	Apr-Jun '09	Jul-Sep '09	Oct-Dec '09	Jan-Mar '10
n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000
%	%	%	%	%	%	%	%	%	%	%

Northern Ireland	Republic Of Ireland
n=500	n=500
%	%



'All Island' – Expectations For Number Of Employees Over The Next Quarter

[Base: All Iol Respondents – n=1000 per quarter]

'ALL ISLAND'

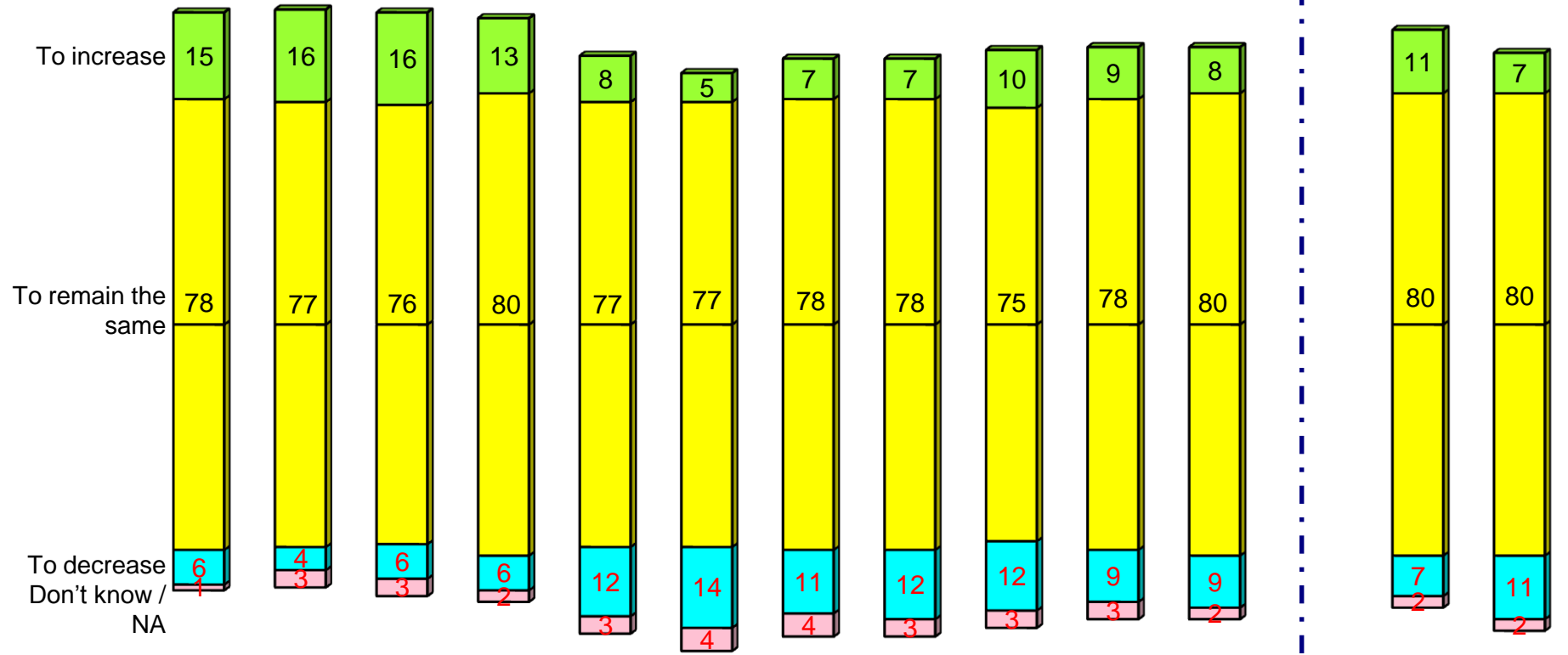
2007 / 2008				2008 / 2009			2009 / 2010			
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QUARTER 4

Period →
Covering

Quarter 1	Quarter 2	Quarter 3	Quarter 4	Quarter 1	Quarter 3	Quarter 4	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Apr-Jun '07	Jul-Sep '07	Oct-Dec '07	Jan-Mar '08	Apr-Jun '08	Oct-Dec '08	Jan-Mar '09	Apr-Jun '09	Jul-Sep '09	Oct-Dec '09	Jan-Mar '10
n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000
%	%	%	%	%	%	%	%	%	%	%

Northern Ireland	Republic Of Ireland
n=500	n=500
%	%



'All Island' – Optimism Regarding Business Performance Over The Next 3 Years

[Base: All Iol Respondents – n=1000 per quarter]

'ALL ISLAND'

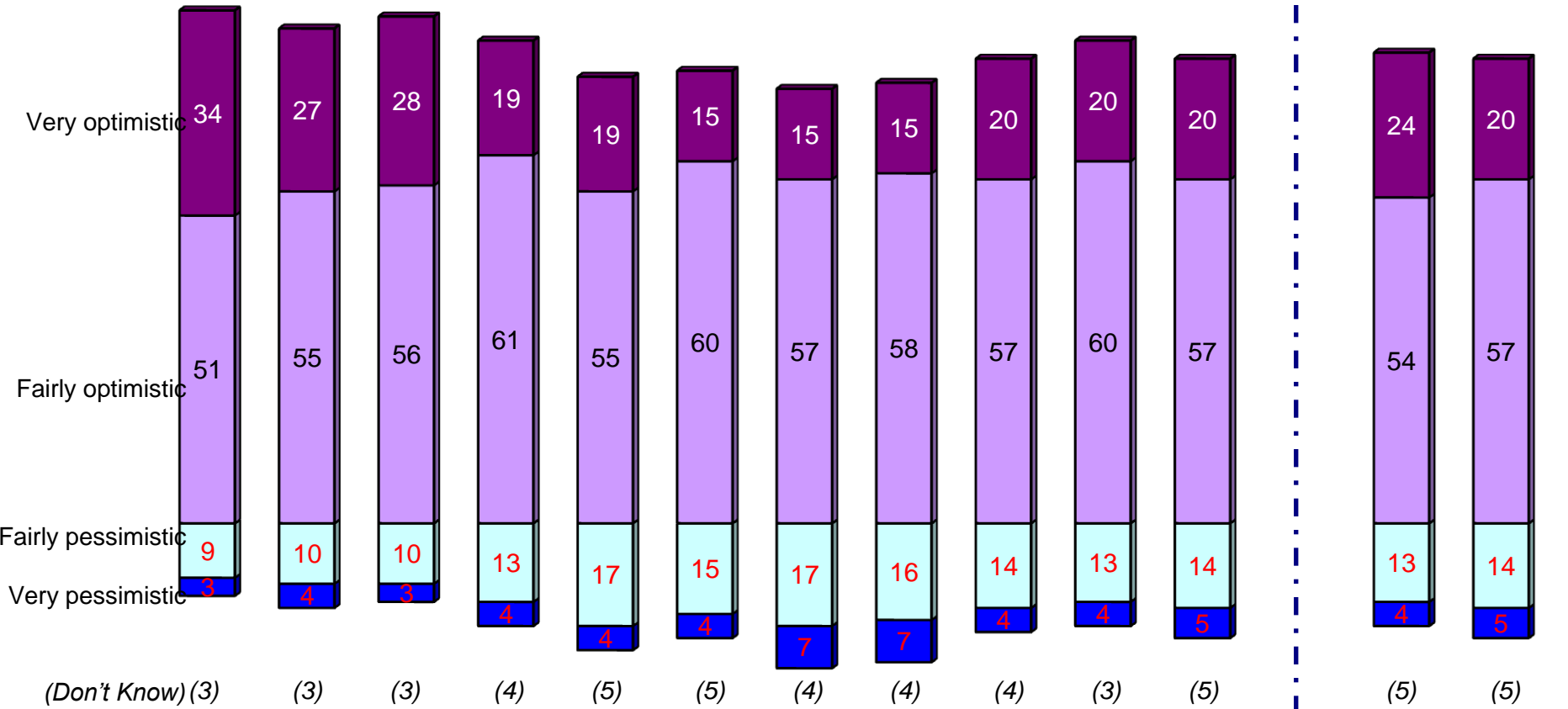
QUARTER 4

2007 / 2008				2008 / 2009			2009 / 2010			
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Period →
Covering

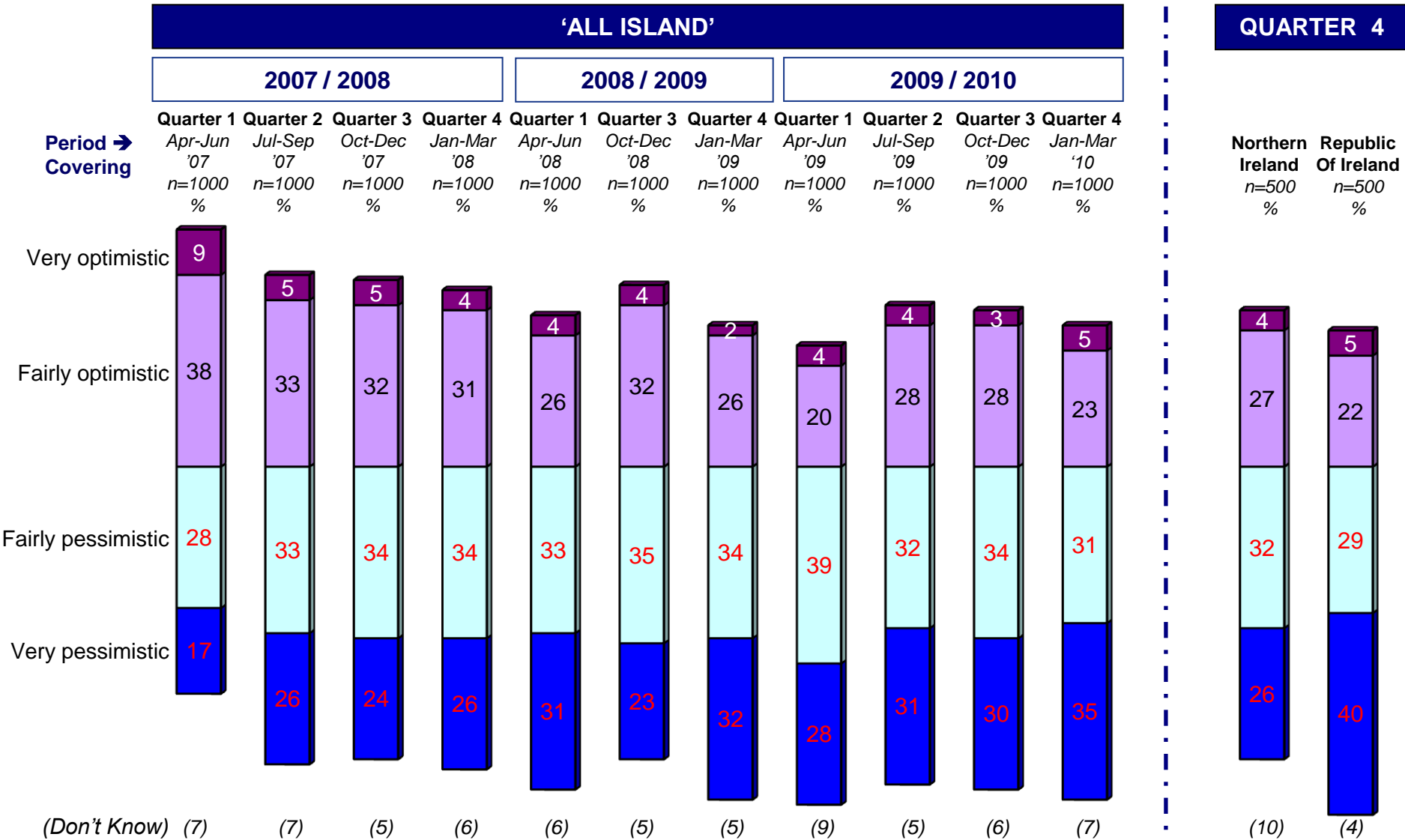
Quarter 1	Quarter 2	Quarter 3	Quarter 4	Quarter 1	Quarter 3	Quarter 4	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Apr-Jun '07	Jul-Sep '07	Oct-Dec '07	Jan-Mar '08	Apr-Jun '08	Oct-Dec '08	Jan-Mar '09	Apr-Jun '09	Jul-Sep '09	Oct-Dec '09	Jan-Mar '10
n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000	n=1000
%	%	%	%	%	%	%	%	%	%	%

Northern Ireland	Republic Of Ireland
n=500	n=500
%	%



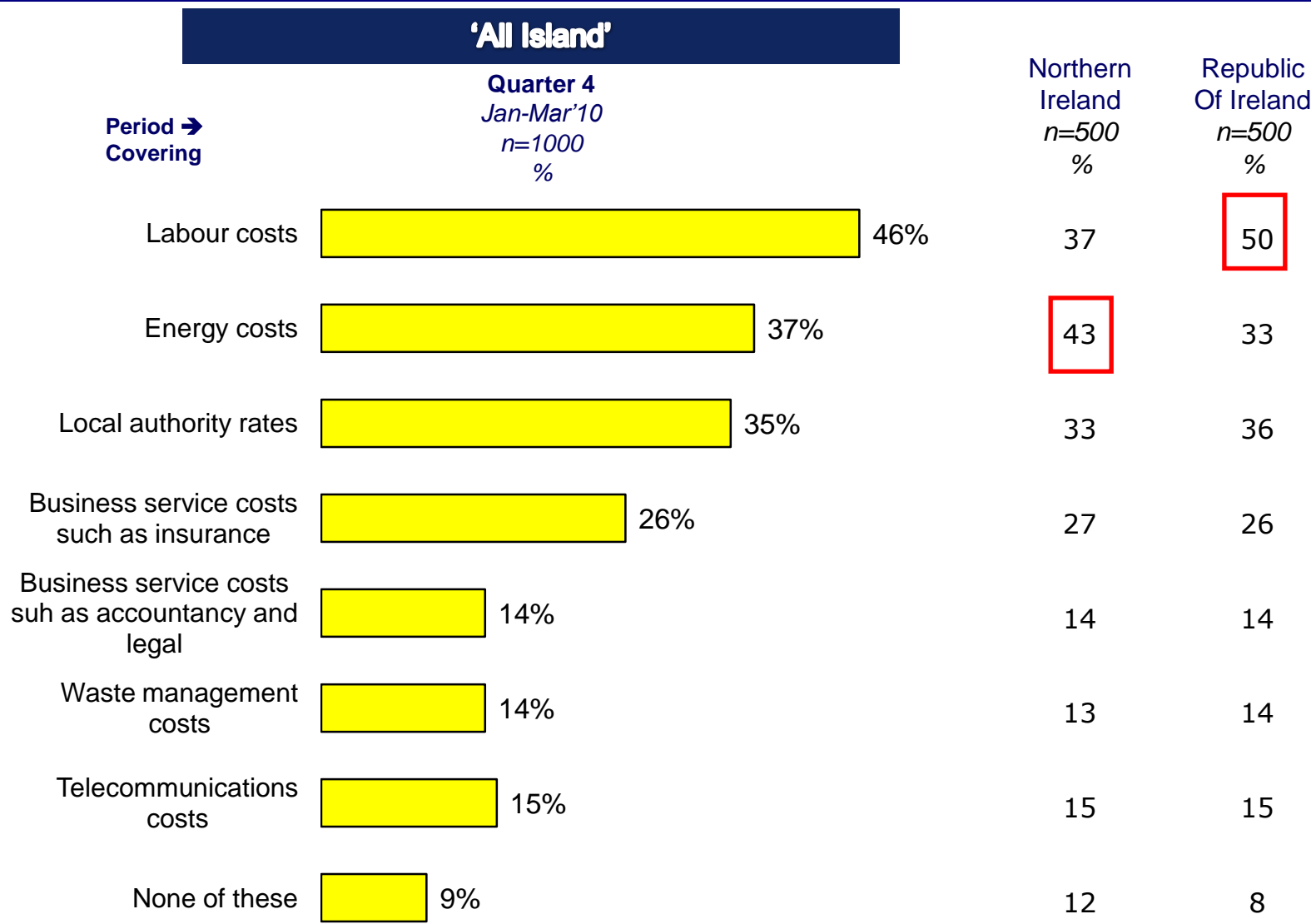
'All Island' – Optimism That Government Will Improve Business Conditions Over The Next 3 Years

[Base: All Iol Respondents – n=1000 per quarter]



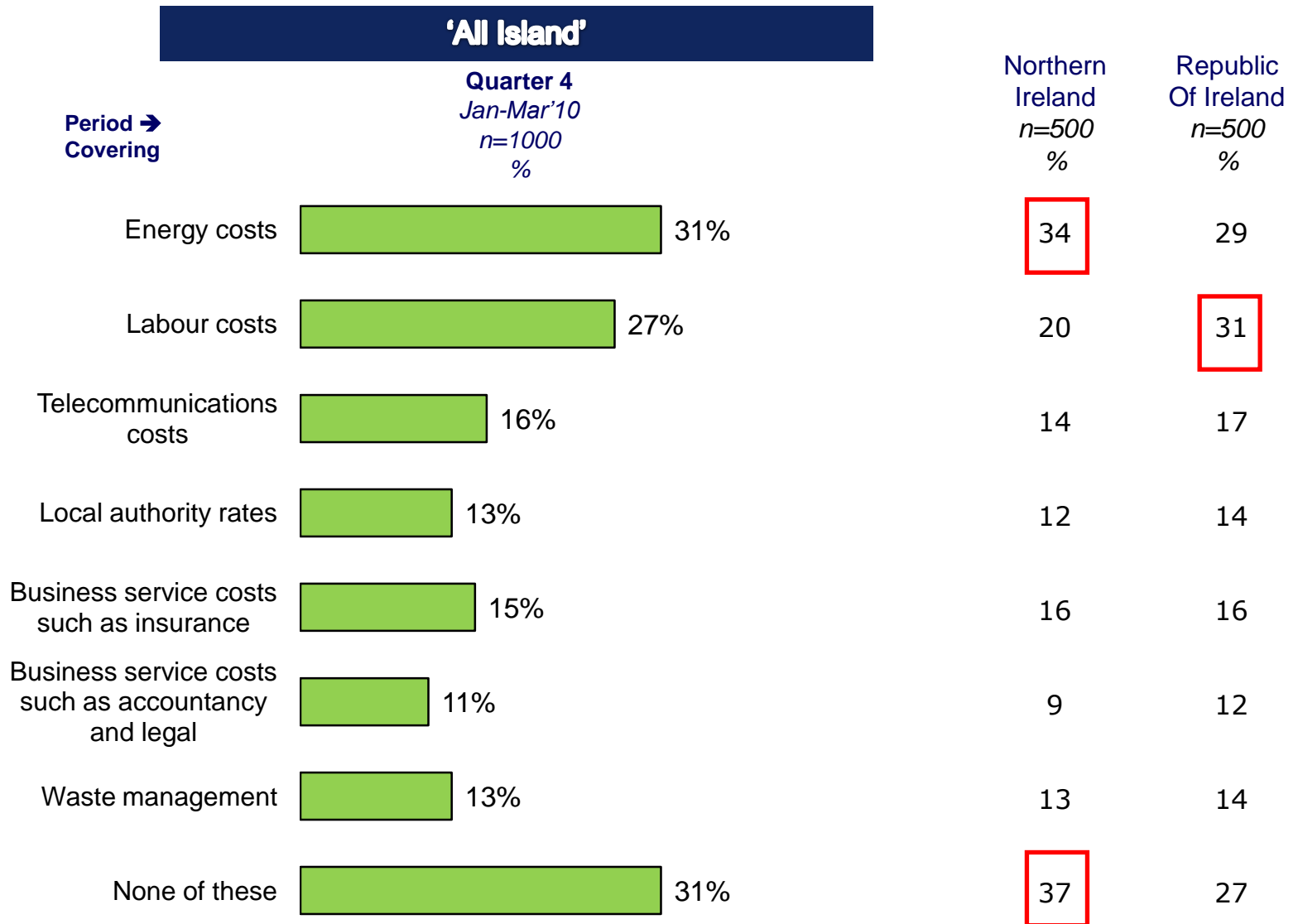
'All Island' – Most Significant Challenge To Competitiveness Of Business At Present

[Base: All Respondents – n=1000]



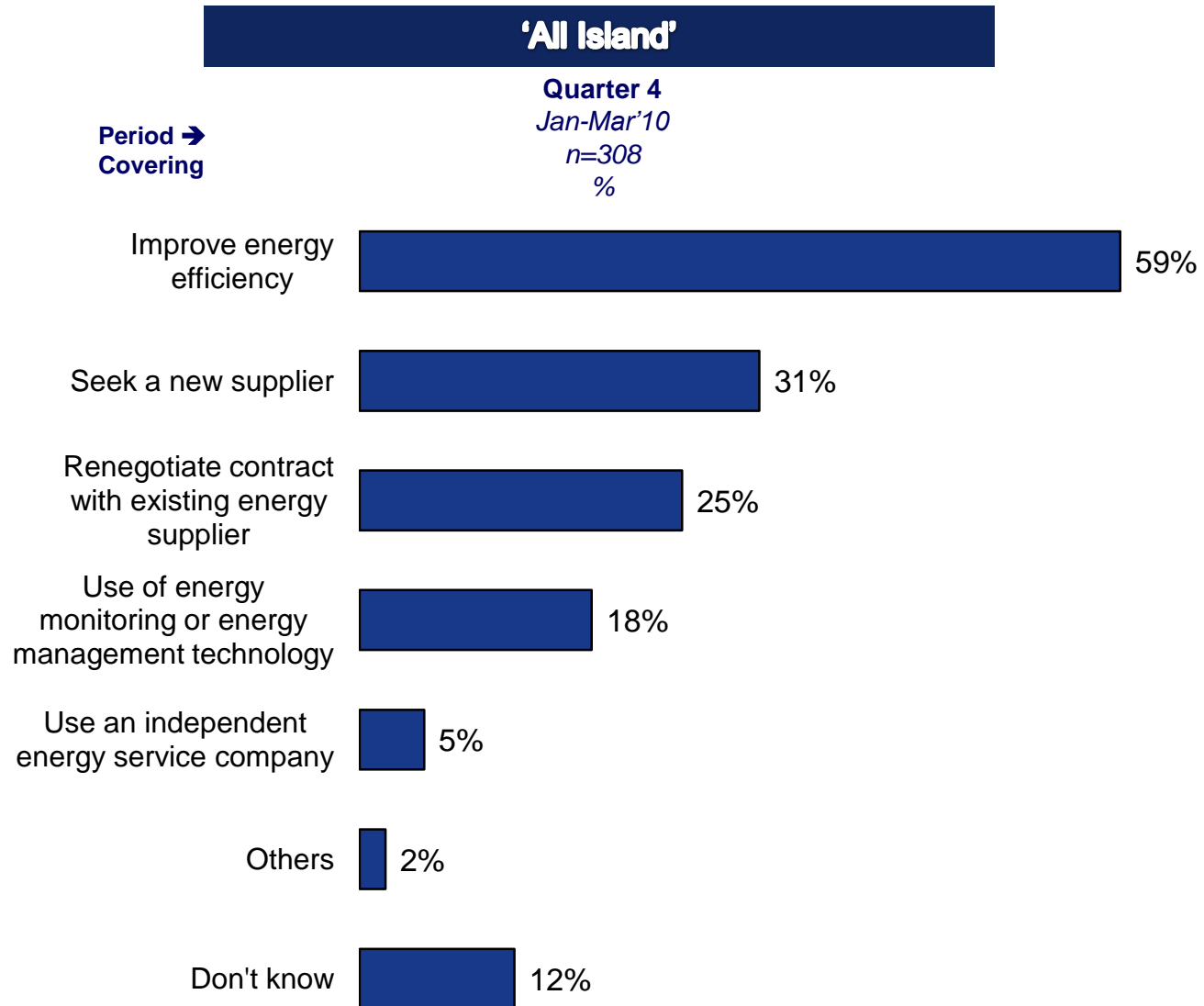
'All Island' – Business Costs Most Likely To Try And Reduce Over Next 6 Months

[Base: All Respondents – n=1000]



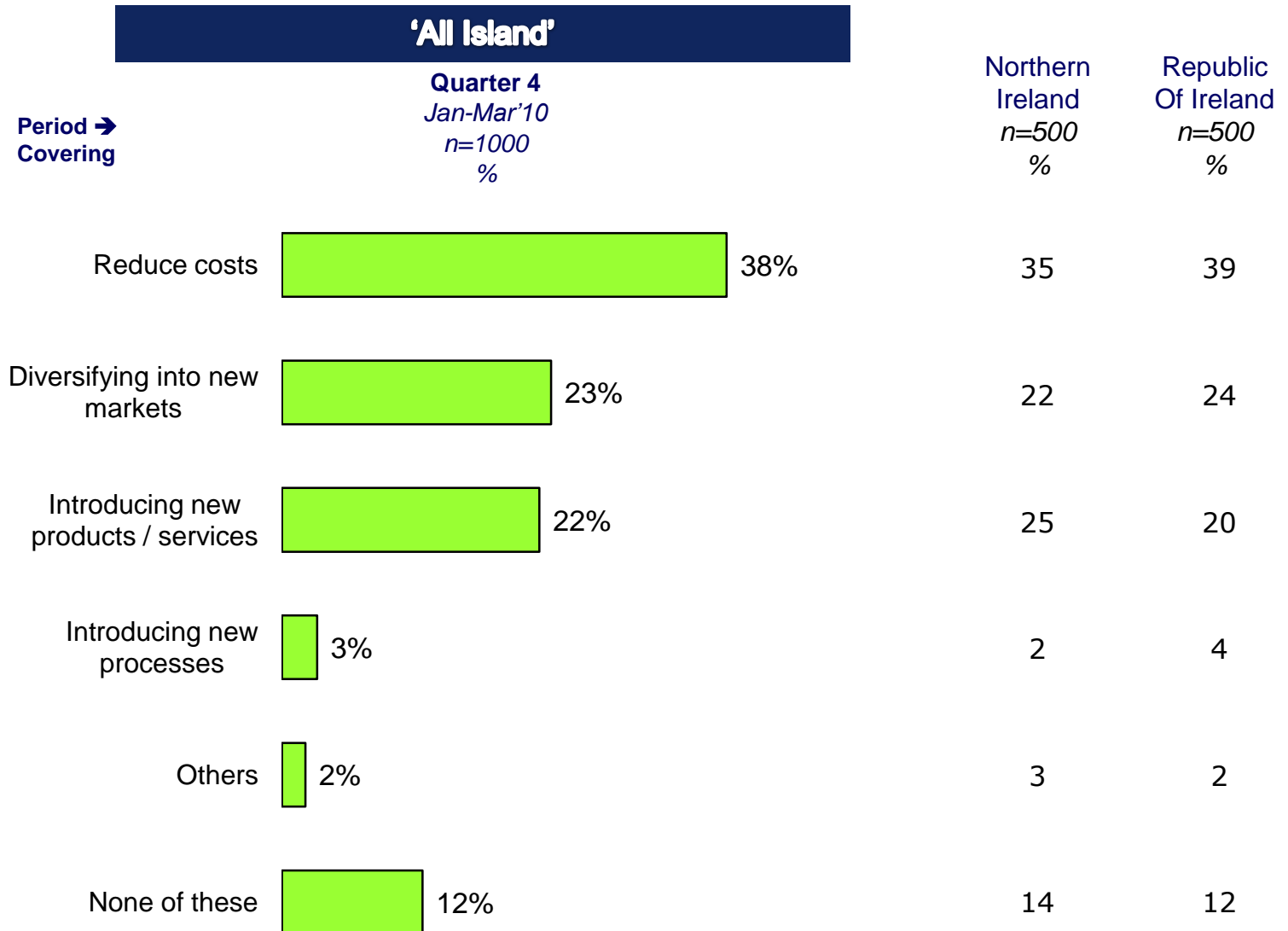
'All Island' – Proposed Methods To Reduce Energy Costs

[Base: All Likely To Reduce Energy Costs Over Next 6 Months – n=308]



'All Island' – Most Important Strategy To Business Over Next 12 Months

[Base: All Respondents – n=1000]



Economic Conditions

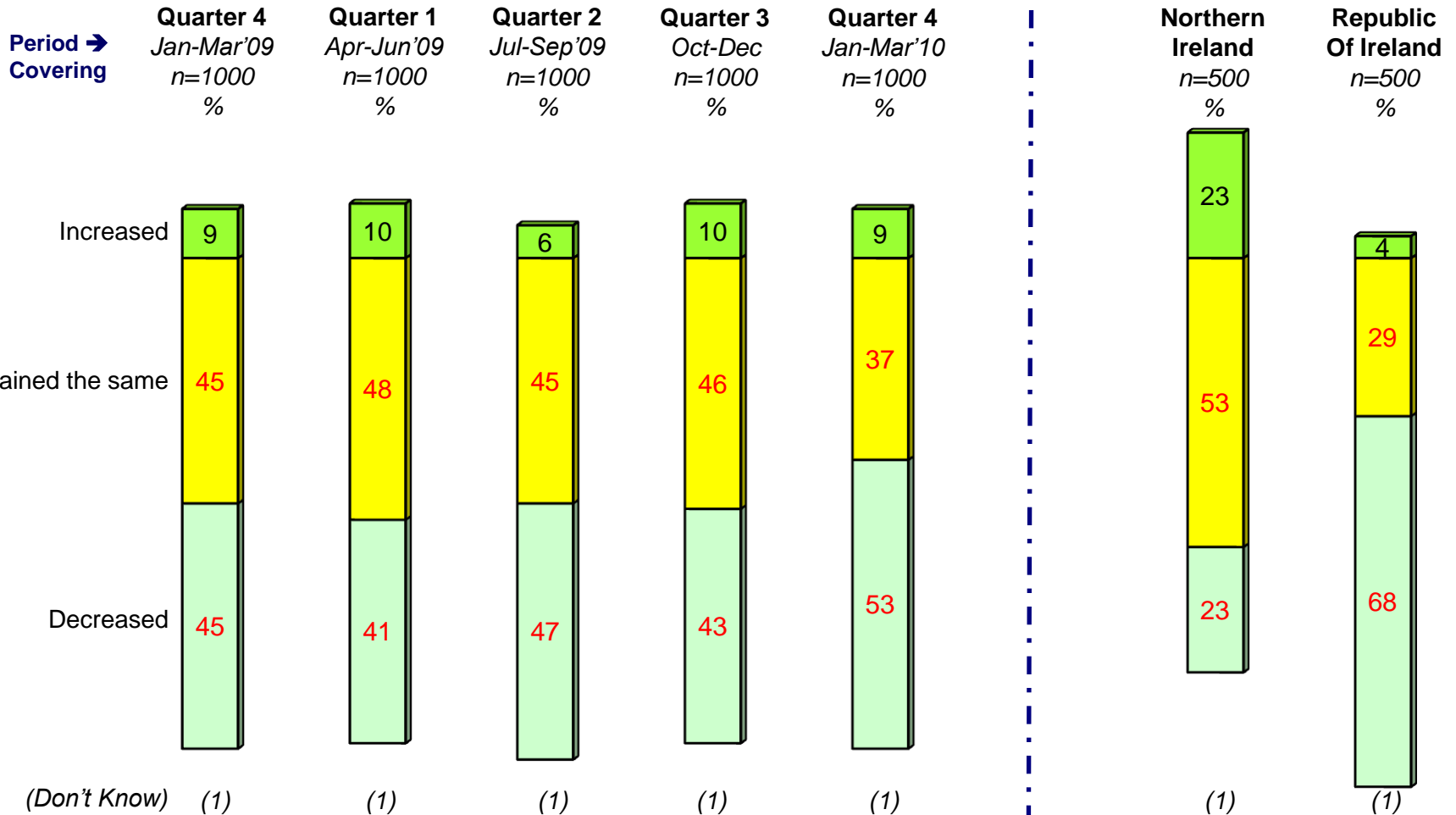
'All Island' – Over The Course Of The PAST 3-6 Months, Have Business Prices For Products Increased / Decreased ...

[Base: All Respondents – n=1000]

2008 / 2009

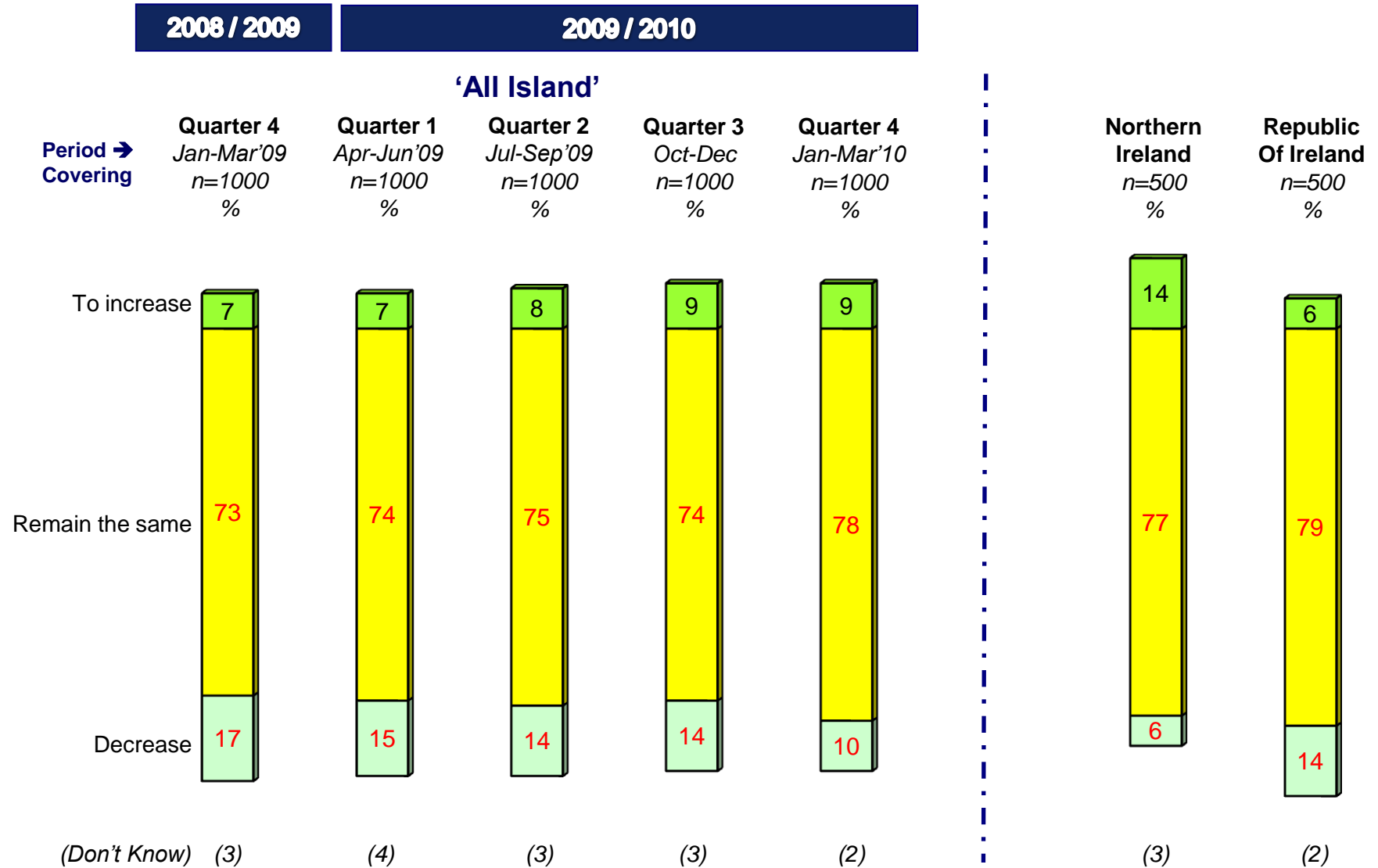
2009 / 2010

'All Island'



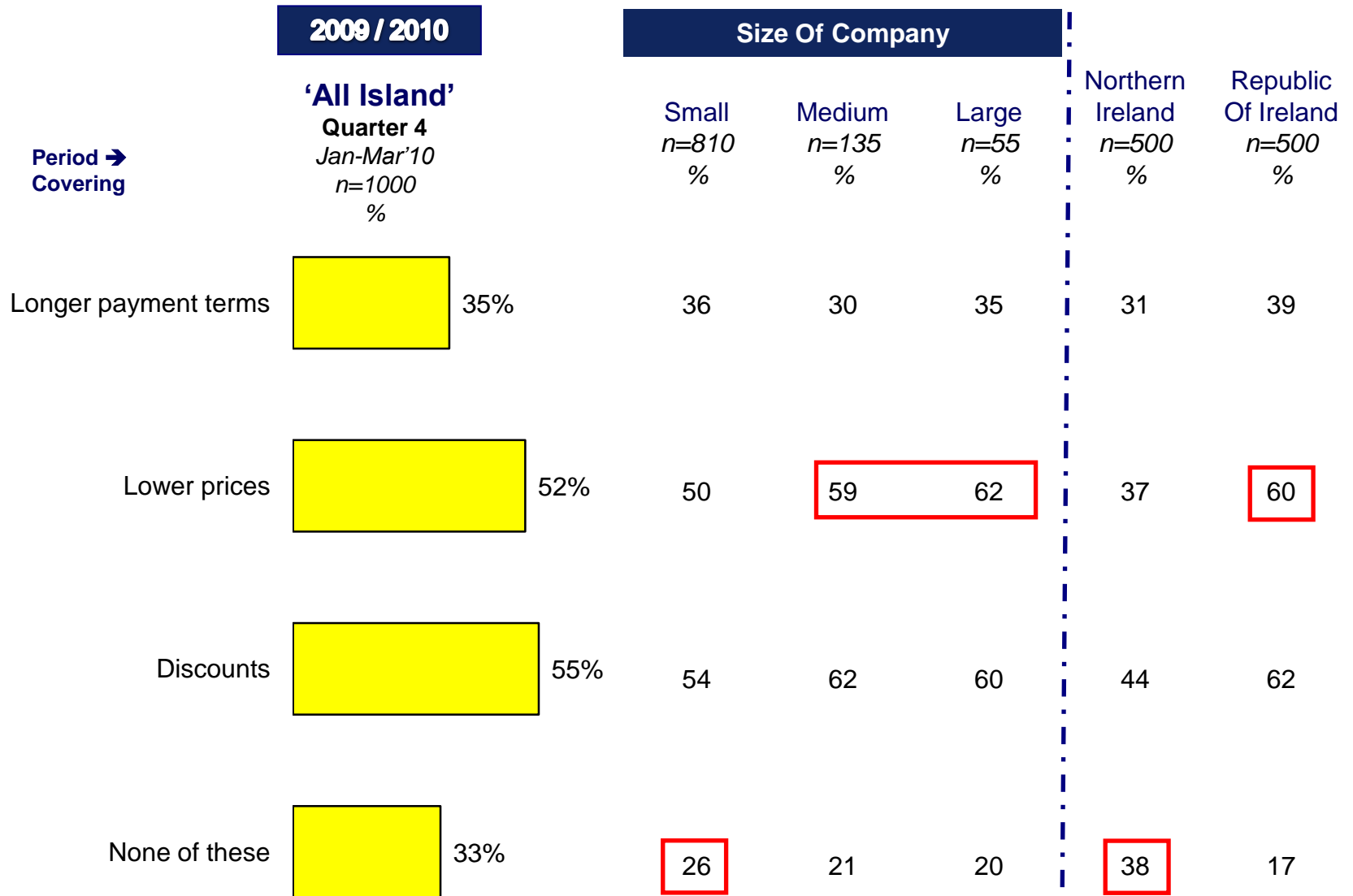
'All Island' – Over The Course Of The NEXT 3-6 Months, Do You expect Your Business Prices For Products To Increase / Decrease ...

[Base: All Respondents – n=1000]



'All Island' – During Economic Downturn – Have Customers Requested Any Of The Following

[Base: All Respondents – n=1000]

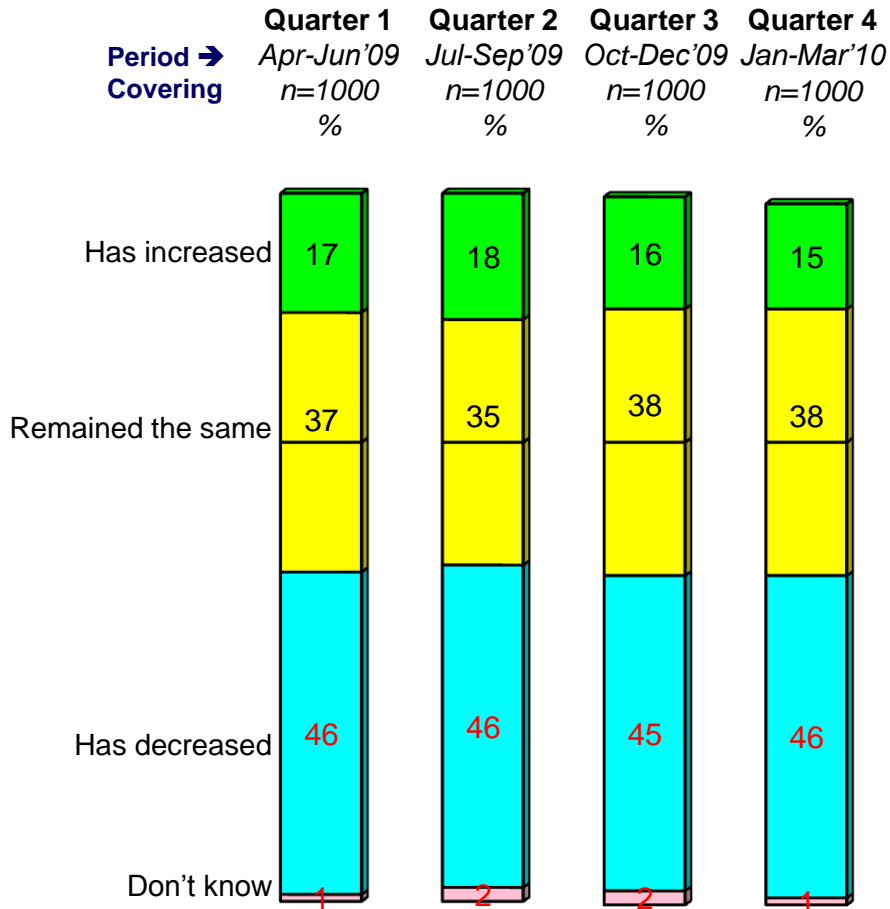


'All Island' – Impact Of Economic Downturn On Customer Base

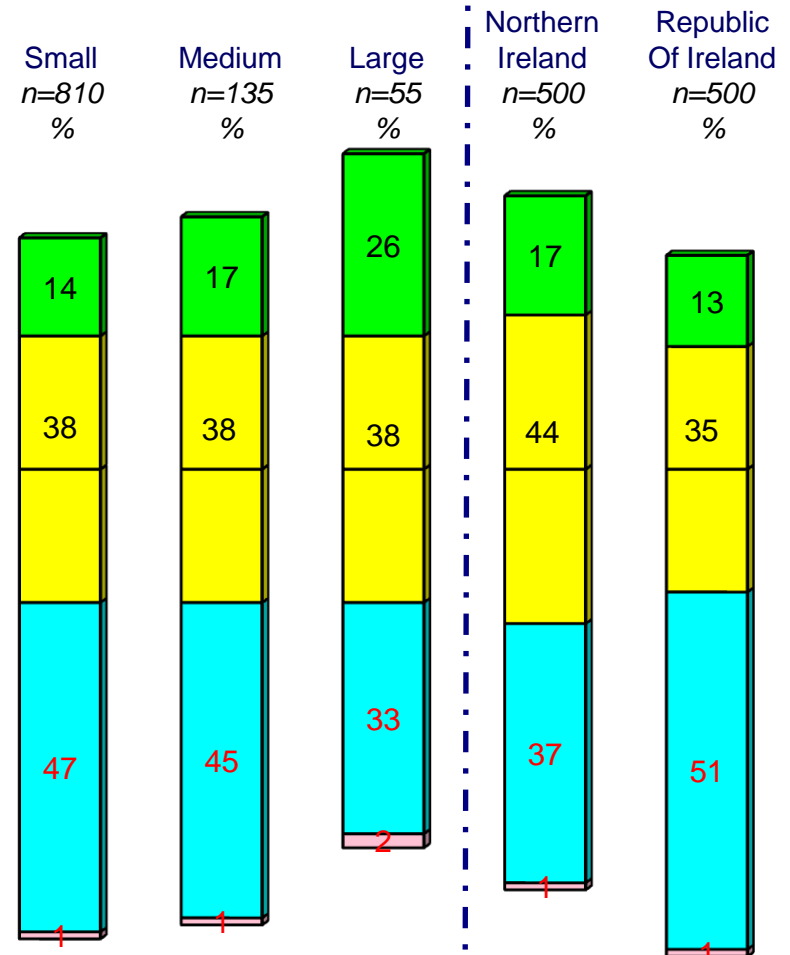
[Base: All Respondents – n=1000]

2009 / 2010

'All Island'

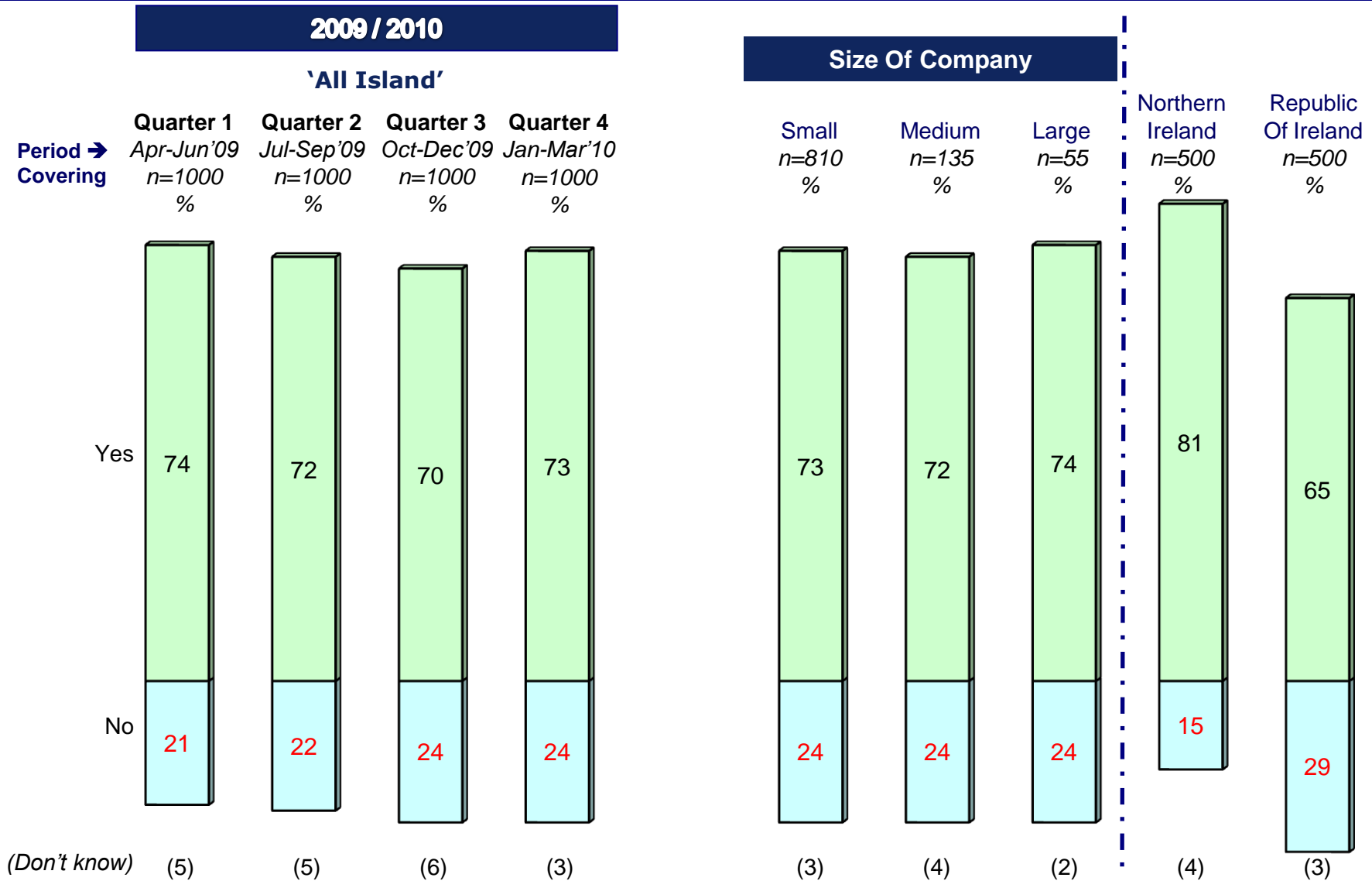


Size Of Company



'All Island' – Has Business Remained Profitable During Economic Downturn

[Base: All Respondents – n=1000]

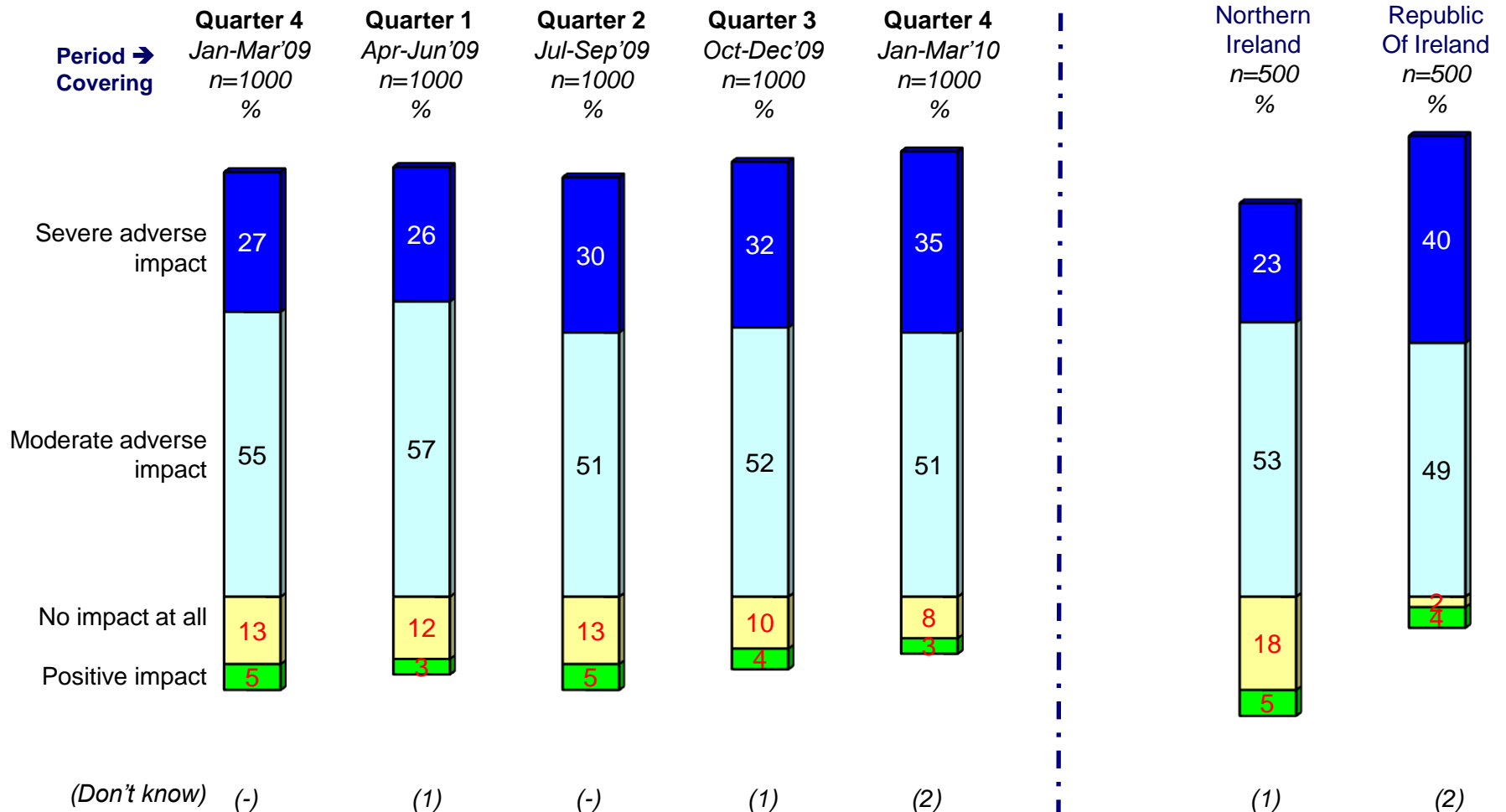


'All Island' – Impact Of Economic Downturn On Business To Date

[Base: All Respondents – n=1000]

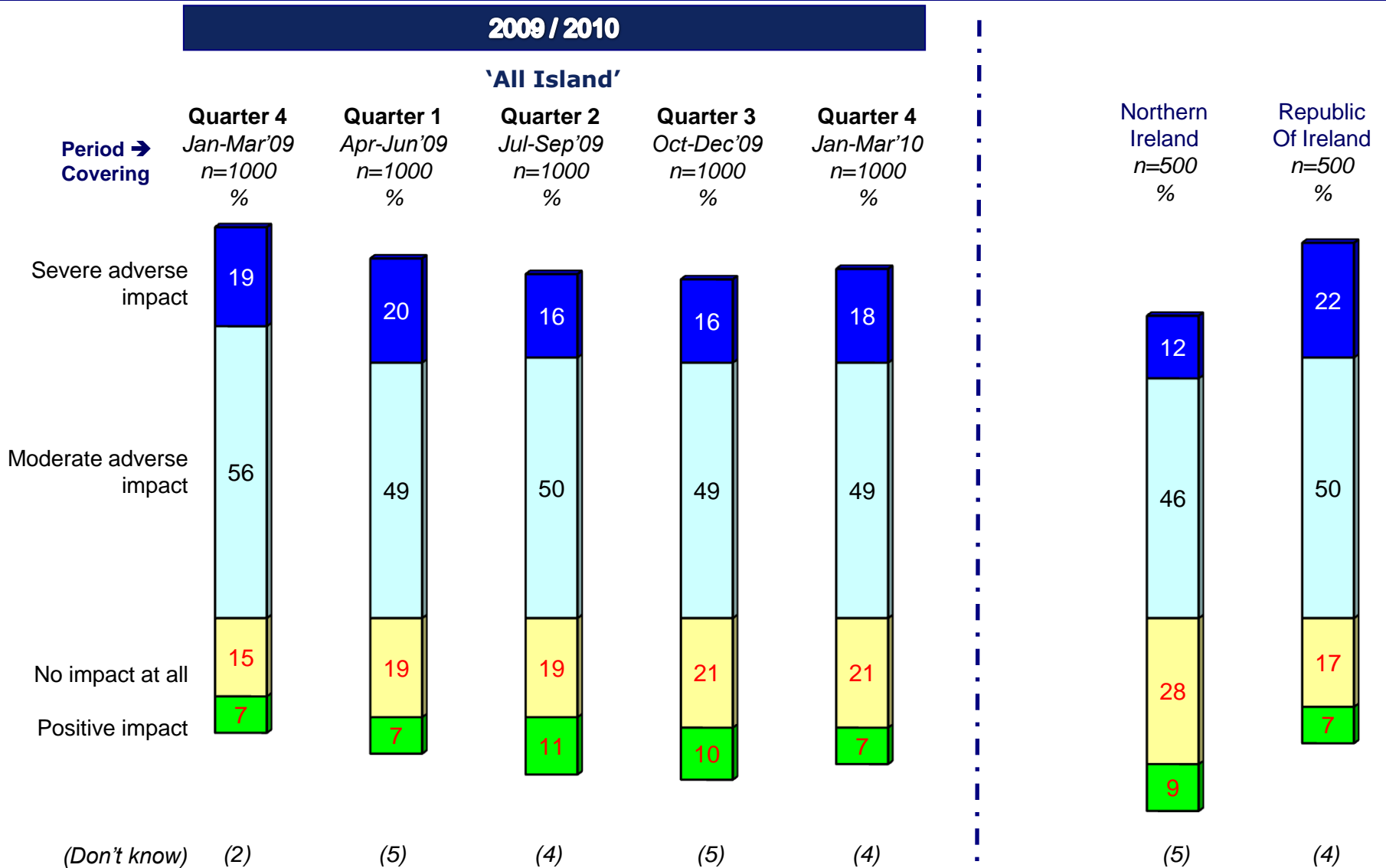
2009 / 2010

'All Island'



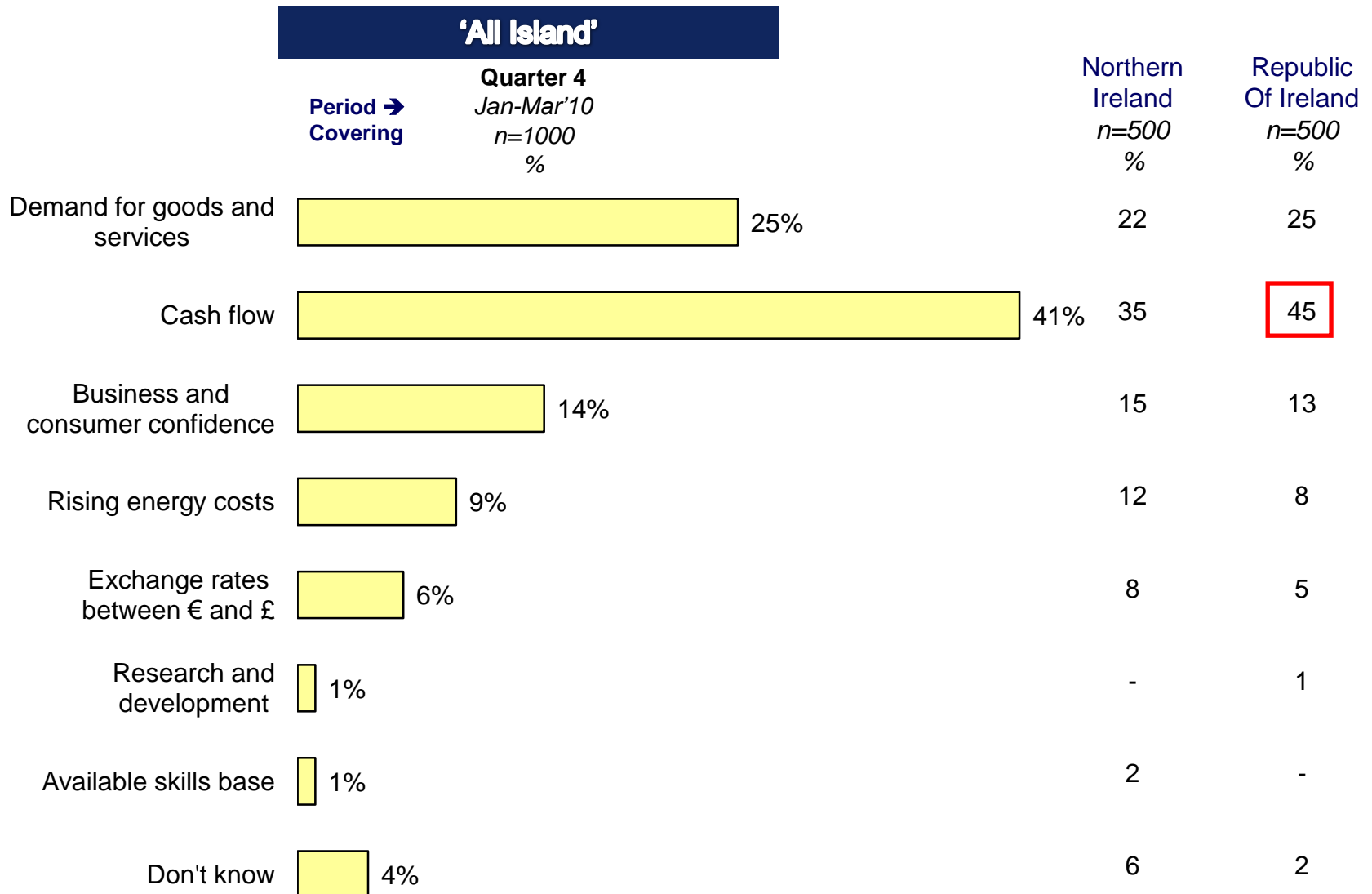
'All Island' – Predicted Impact Of Economic Downturn On Business Over Next 12 Months

[Base: All Respondents – n=1000]



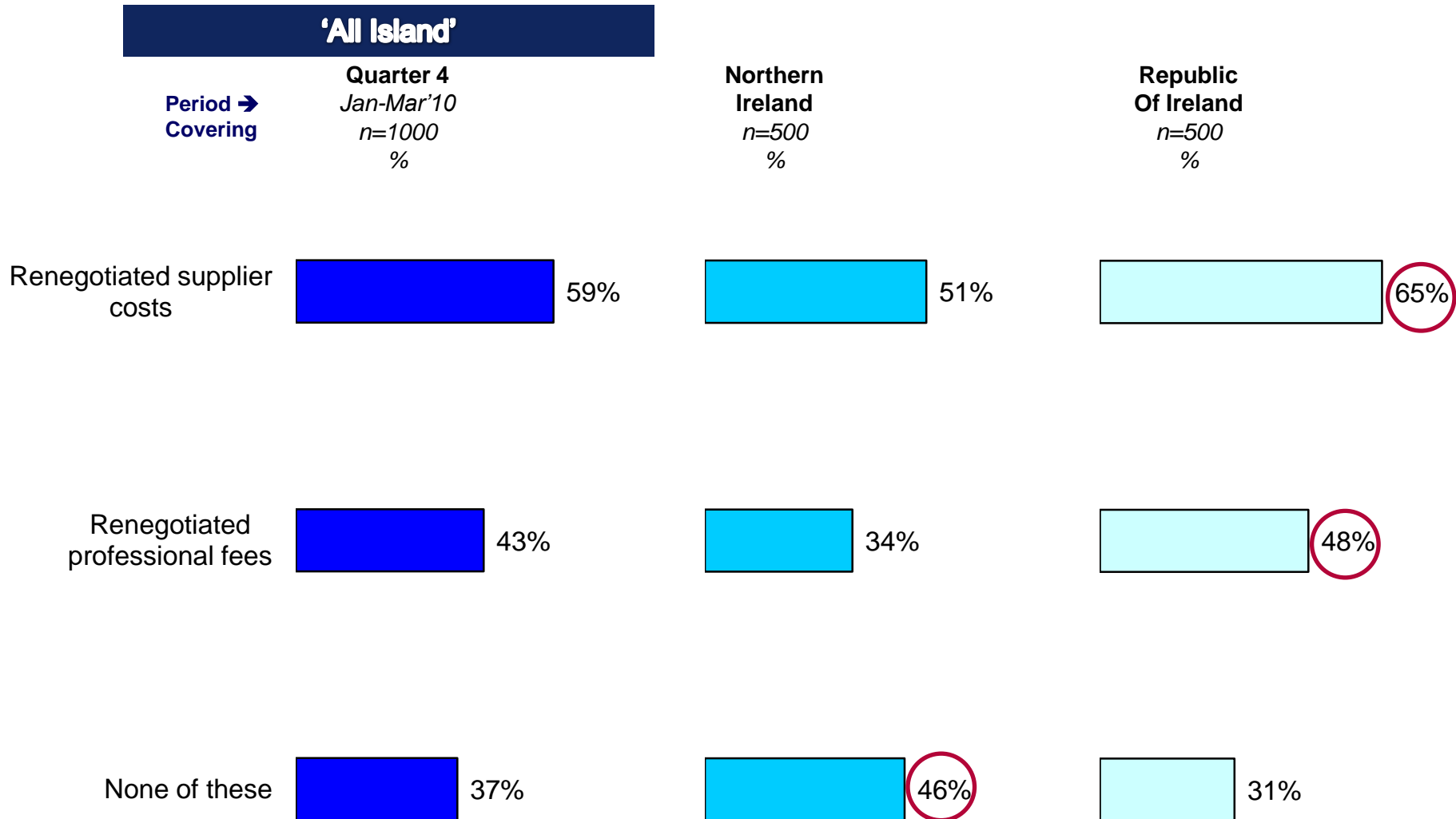
'All Island' - Single Most Important Issue Facing Business During 2010

[Base: All Respondents – n=1000]



'All Island' – Cost Negotiations During Economic Downturn

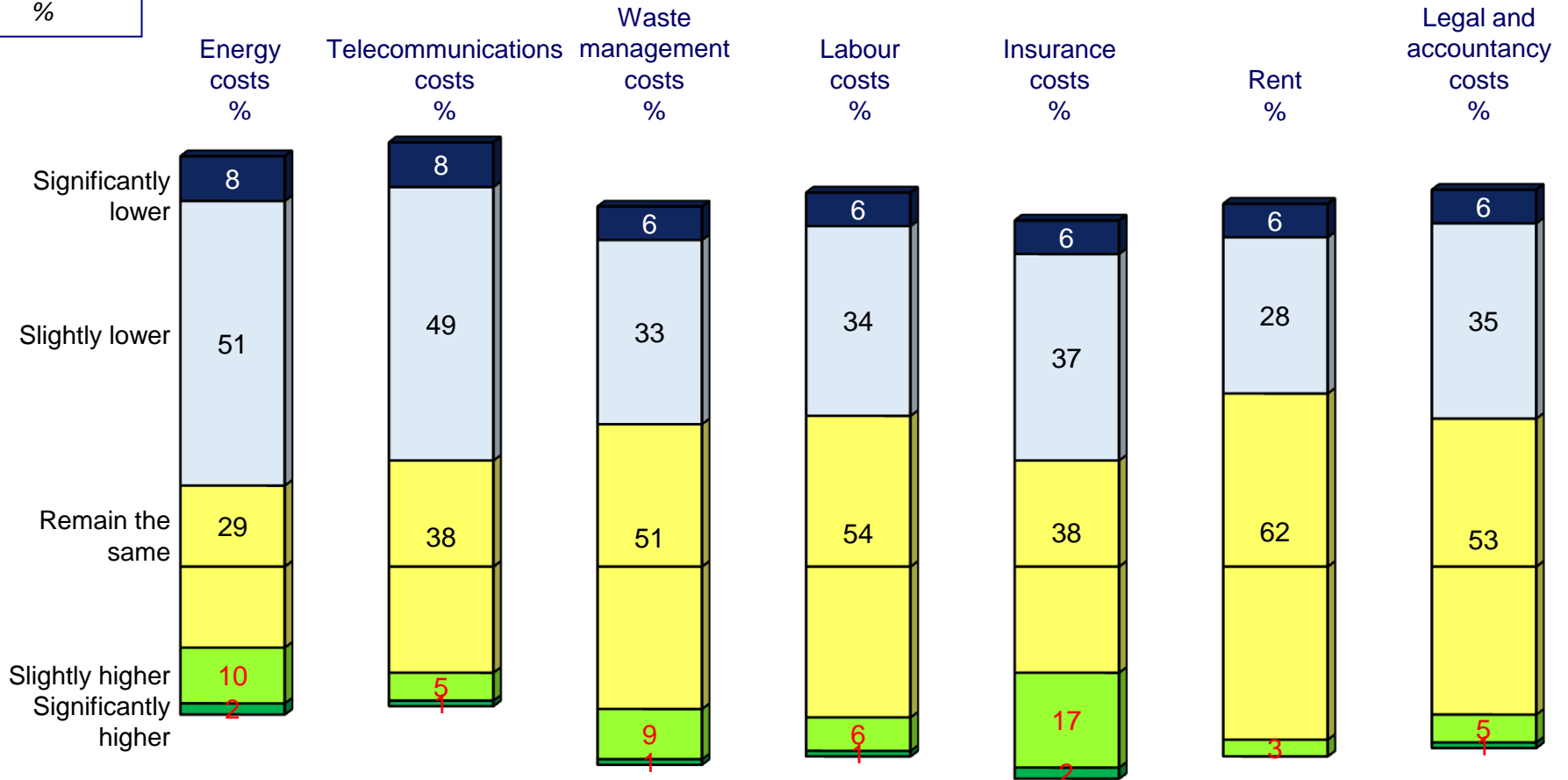
[Base: All Respondents – n=1000]



'All Island' – Expectations On Cost When Negotiating New Contracts

[Base: All Respondents – n=1000]

'All Island'
 Quarter 4
 Jan-Mar'10
 n=1000
 %

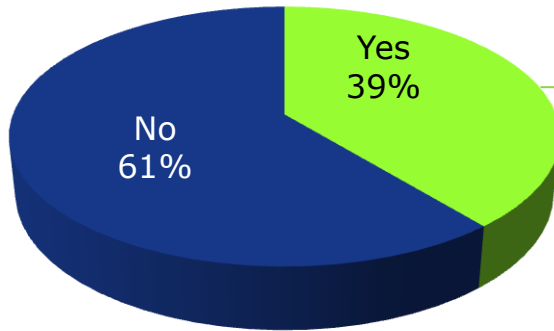


'All Island' – Business Property

[Base: All Respondents - $n=1000$]

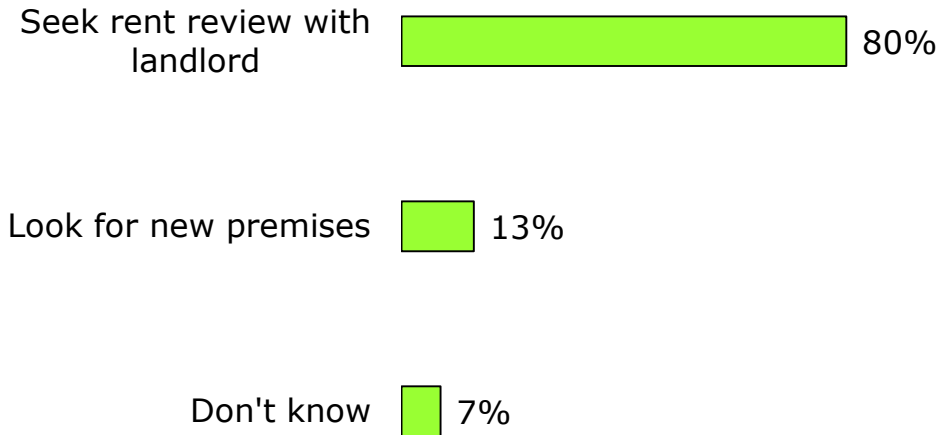
Does Business Currently Rent Its Premises

'All Island'
 $n=1000$



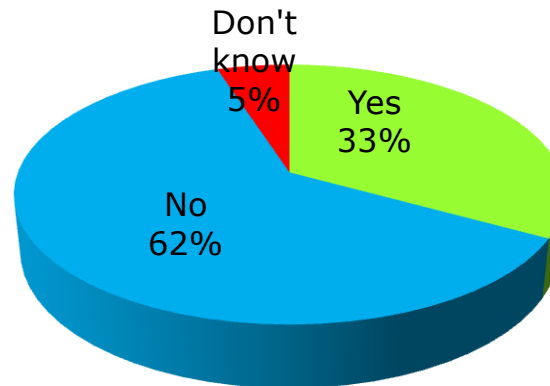
Methods Plan To Use To Reduce Rent

$n=128$



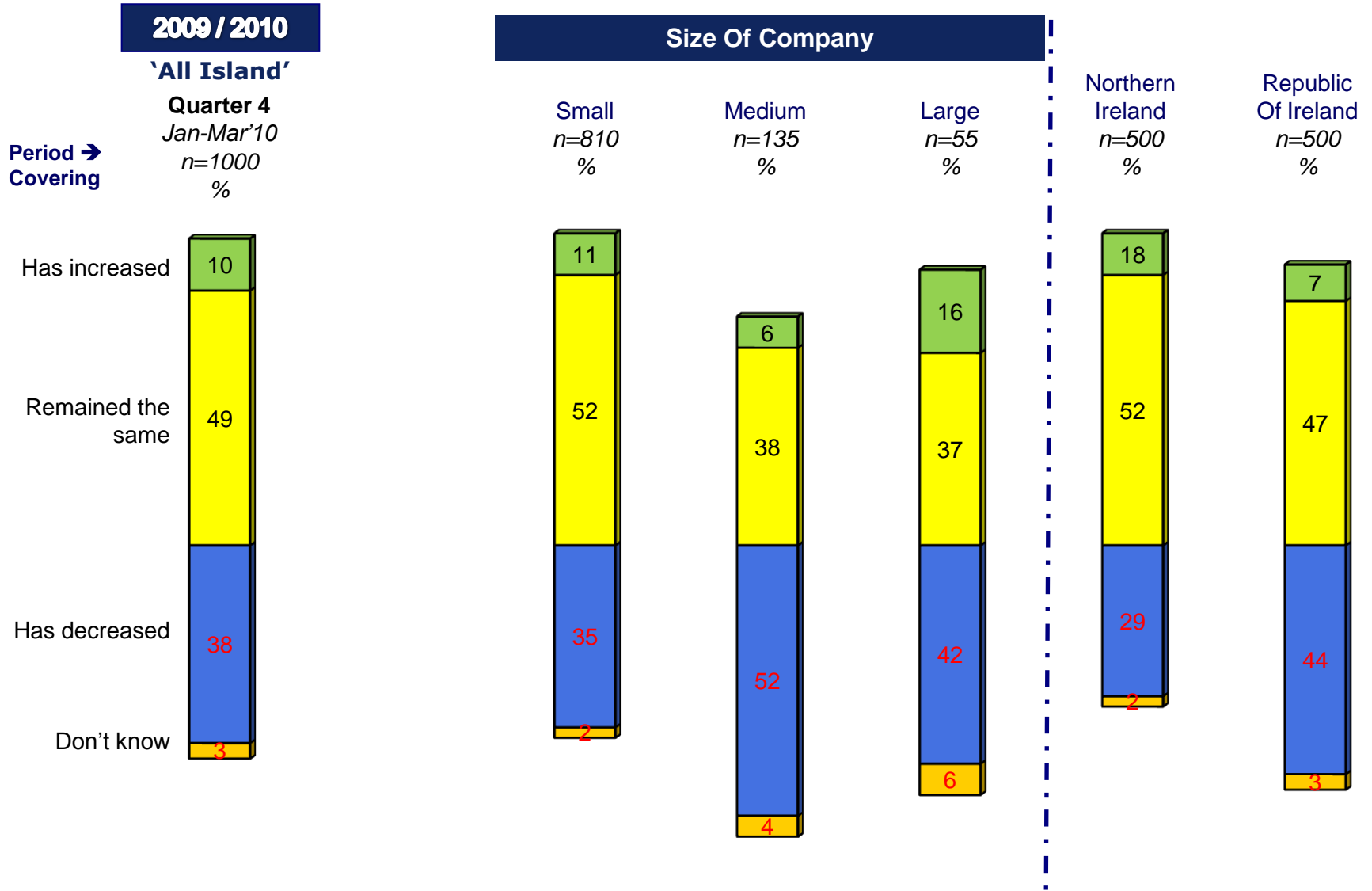
Plan To Try And Reduce Rent Paid Over Next 6 Months

$n=398$



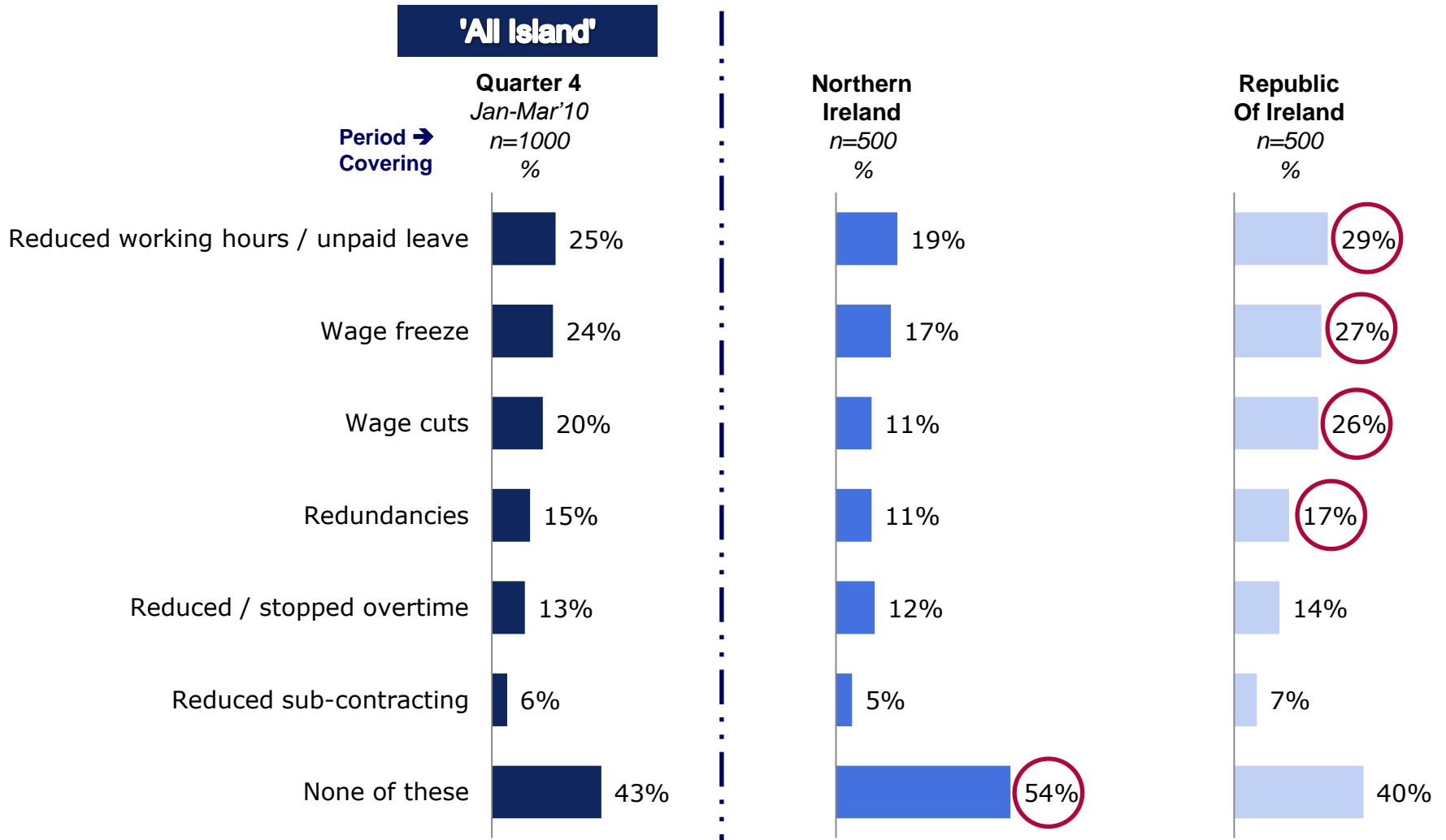
'All Island' – Impact On Average Wage Bill Over The Past Year

[Base: All Respondents – n=1000]



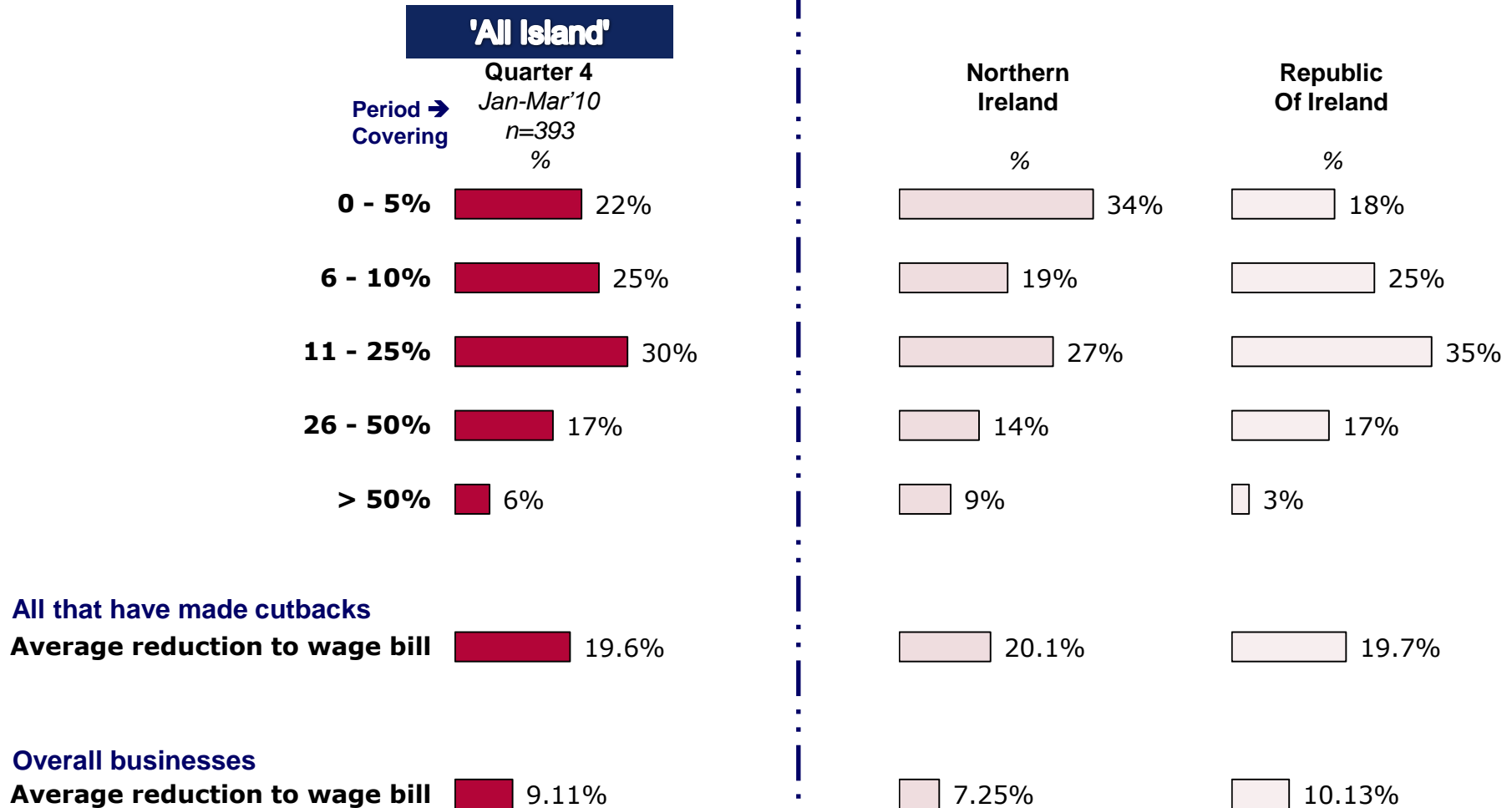
'All Island' – Staff Cutbacks During Economic Downturn

[Base: All Respondents – n=1000]



'All Island' – Percentage Reduction on Wage Bill As A Result of Cutbacks

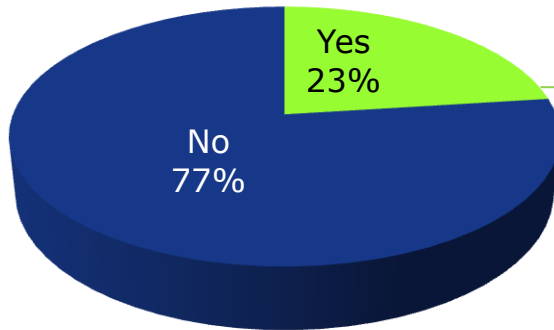
[Base: All That Made Staff Cutbacks – n=393 *Excludes 'Don't know's']



'All Island' – Nature Of Bonus Cutbacks During Economic Downturn

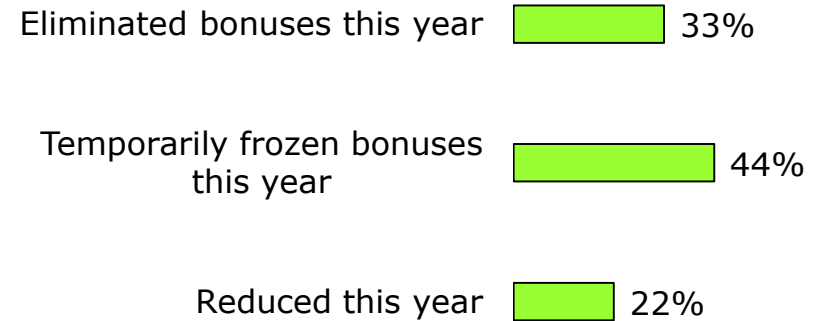
[Base: All Respondents - n=1000]

Does company pay staff bonuses



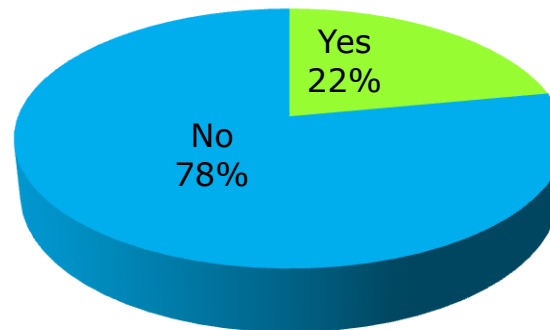
Nature of bonus cuts

[Base: All That Cut Bonuses n=49]



Has company cut bonuses during economic downturn

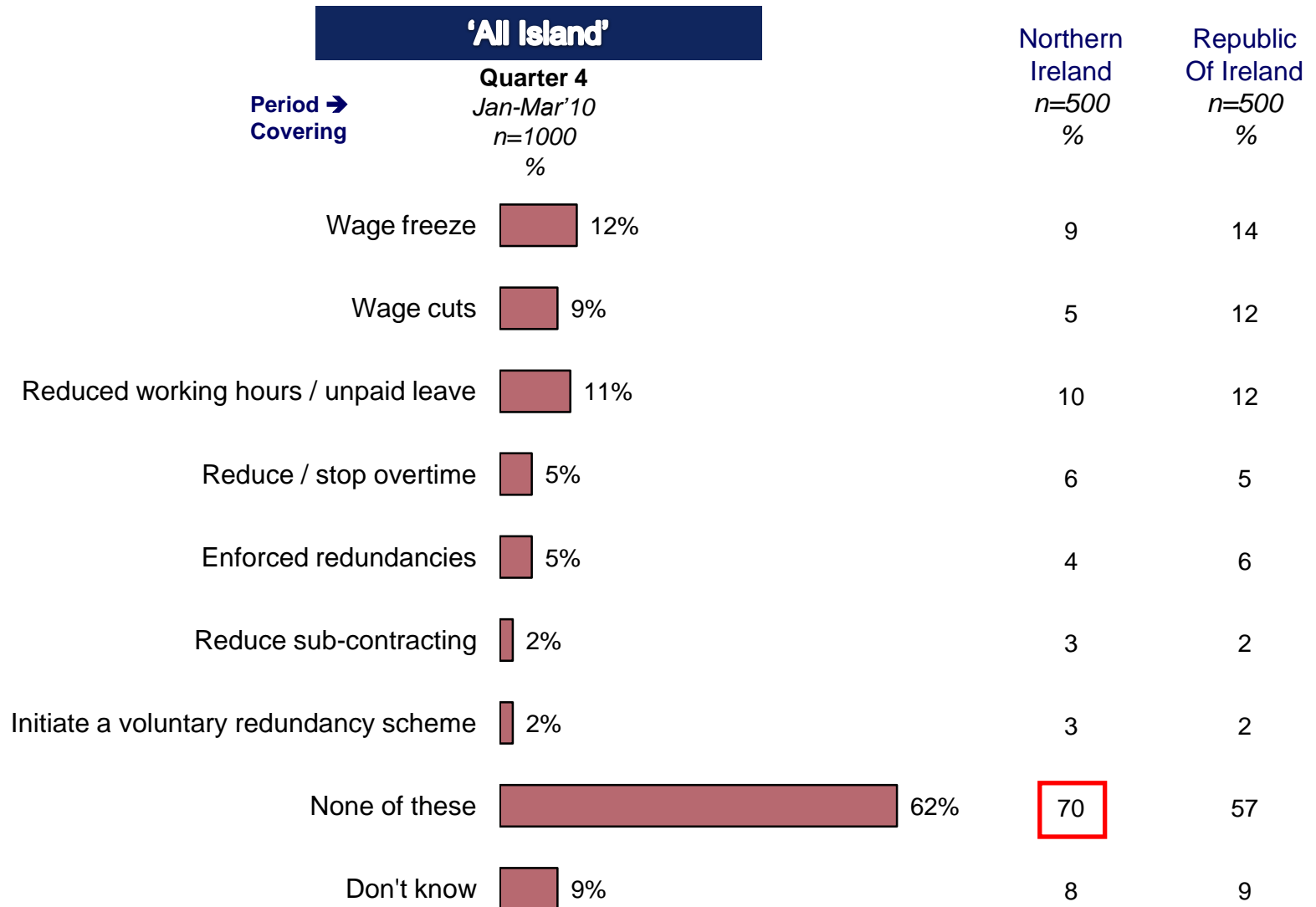
[Base: All That Pay Bonuses n=229]



Undecided | 1%

'All Island' – Predicted Staff Cuts For 2010

[Base: All Respondents – n=1000]



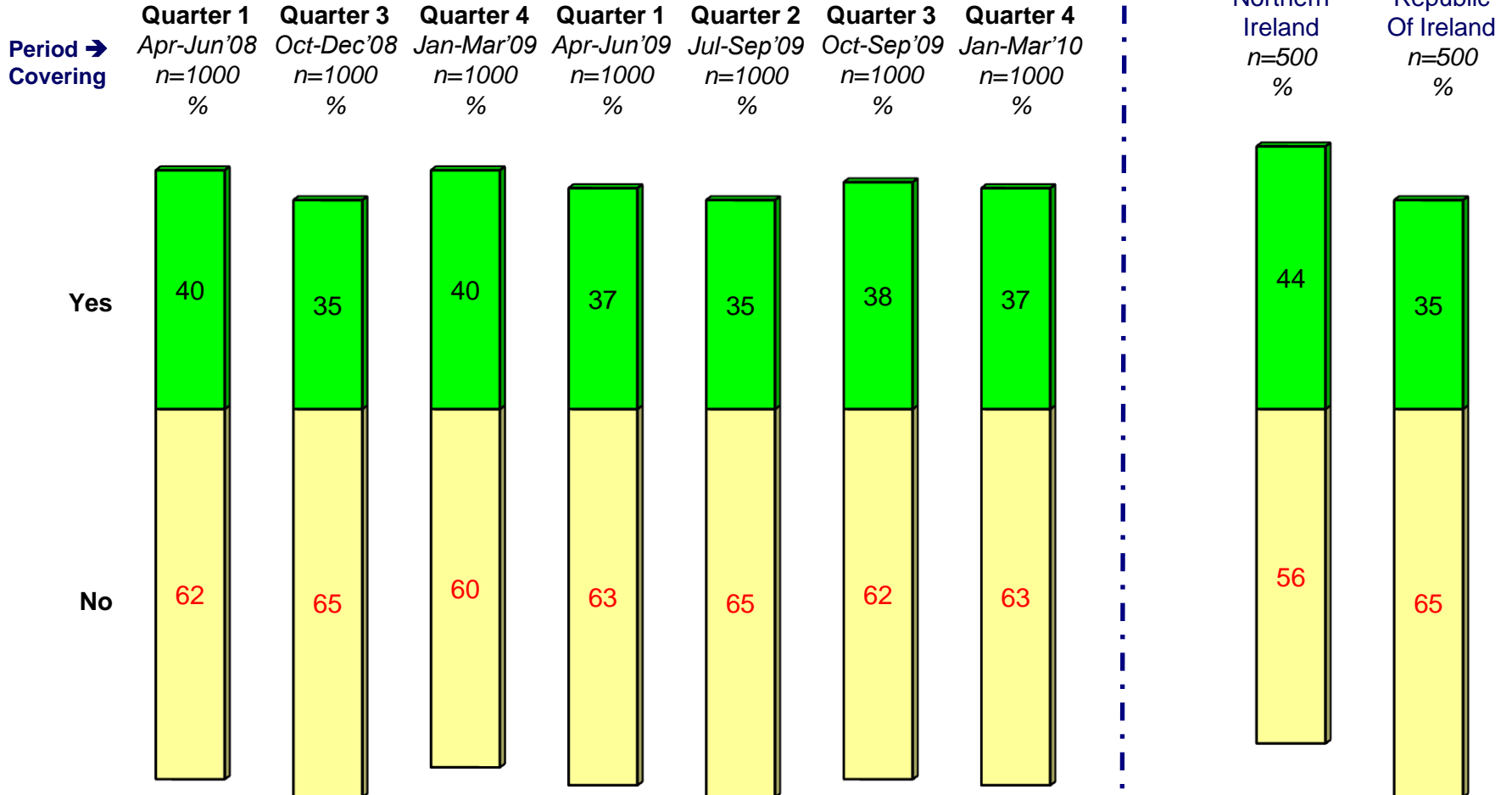
[16% of those that pay bonuses plan to cut these during 2010]

Cross Border Trade

Does Company Take Part In Cross-Border Trade

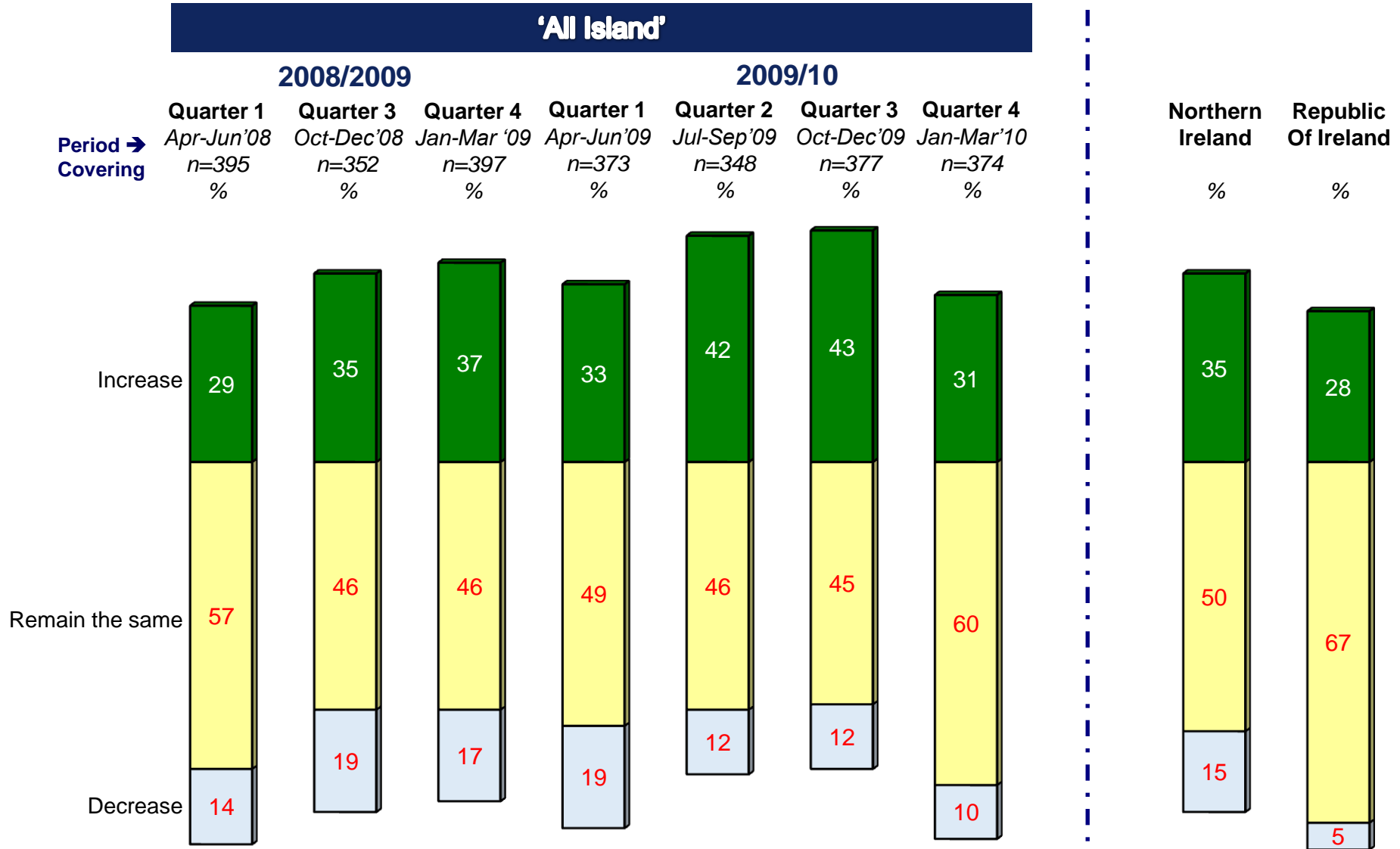
[Base: All Iol Respondents – n=1000 per quarter]

'All Island'



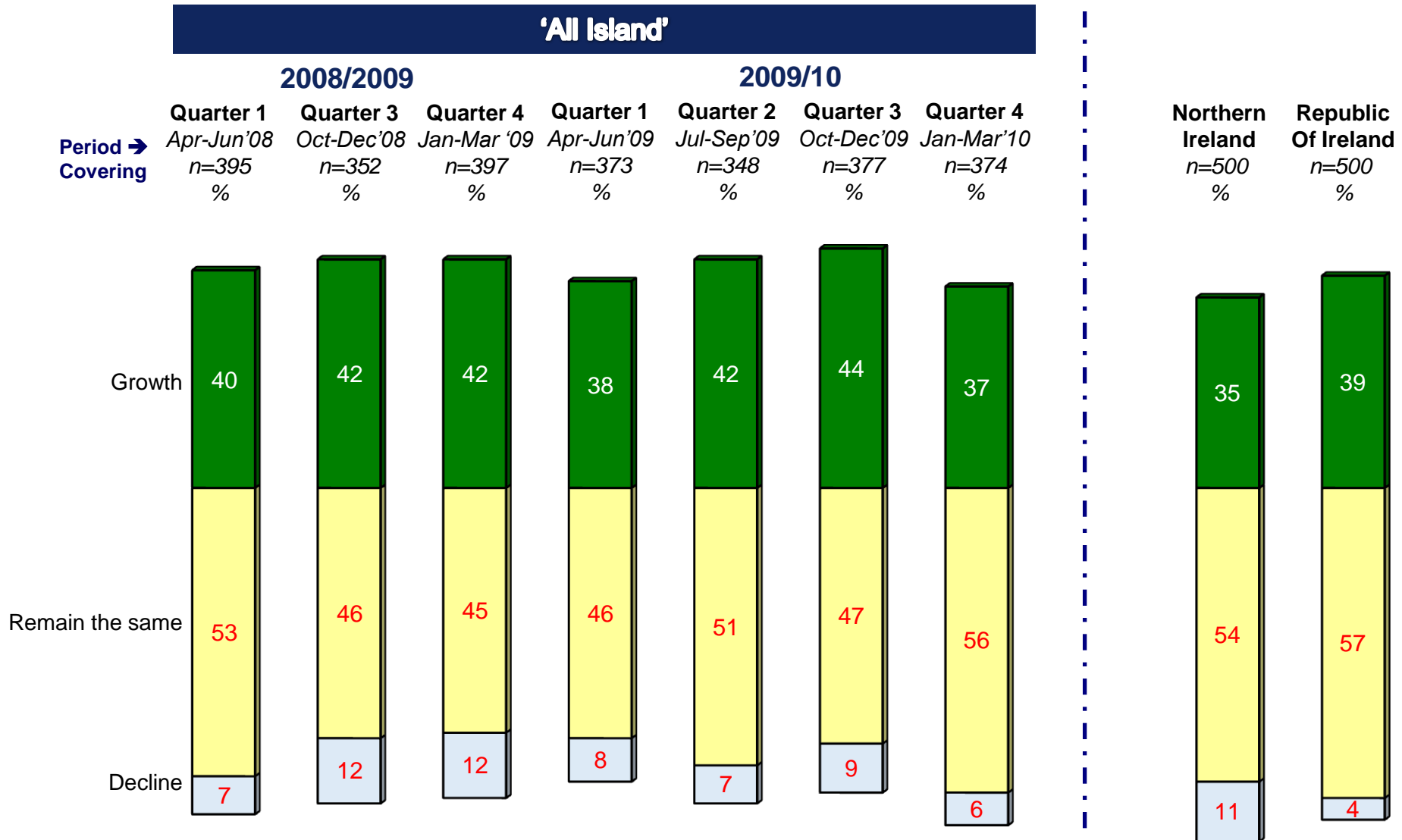
Expect % Of Cross-Border Trade To Increase / Decrease Over The Next 12 Months

[Base: All Iol Businesses That Take Part In Cross-Border Trade – n=374]



Expect Cross-Border Co-Operation To experience Growth / Decline Over The Next 3 years

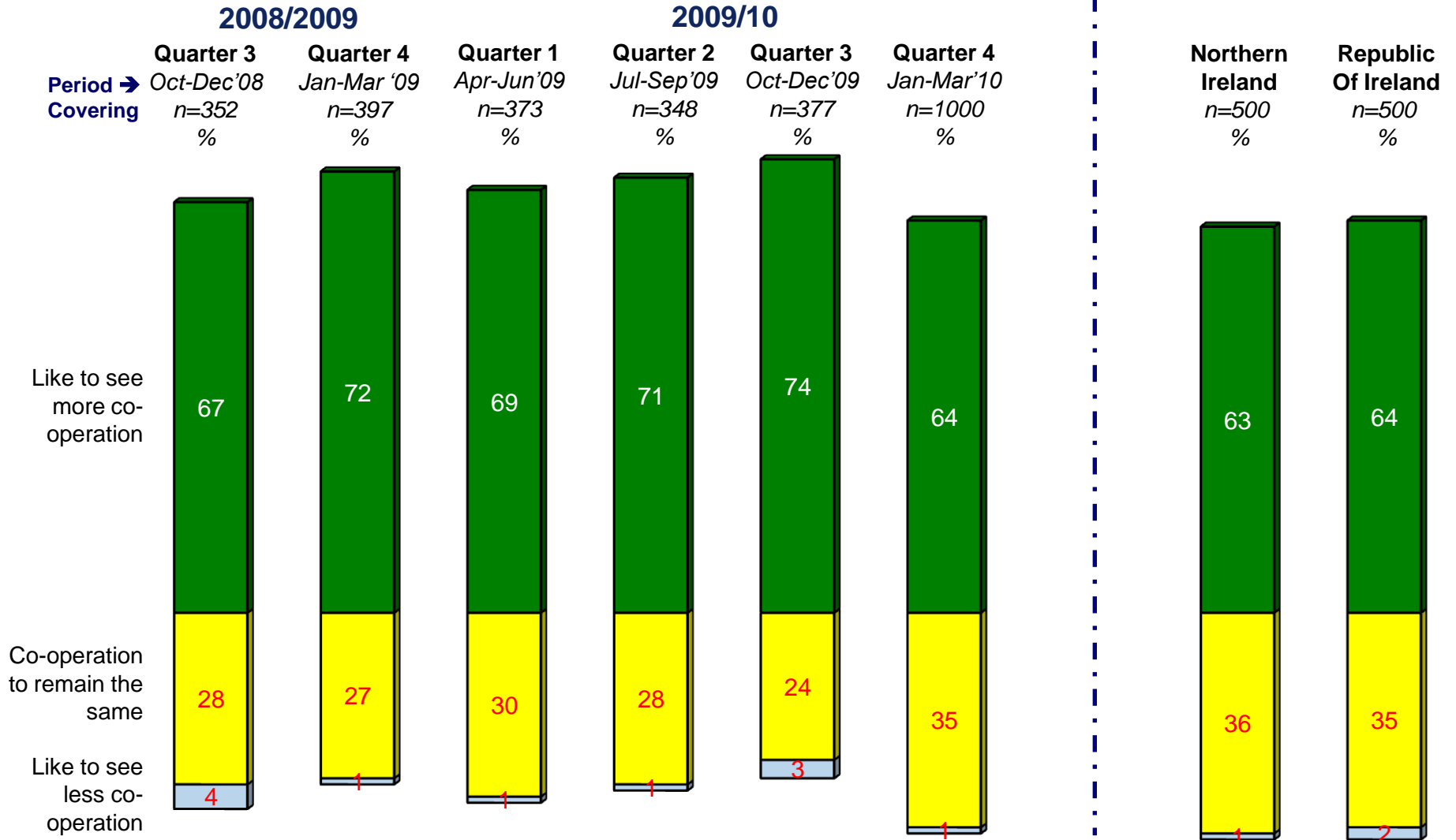
[Base: All Iol Respondents – n=1000]



Business Perceptions On Levels Of Cross-Border Business Co-Operation In The Future

[Base: All Iol Respondents – n=1000 per quarter]

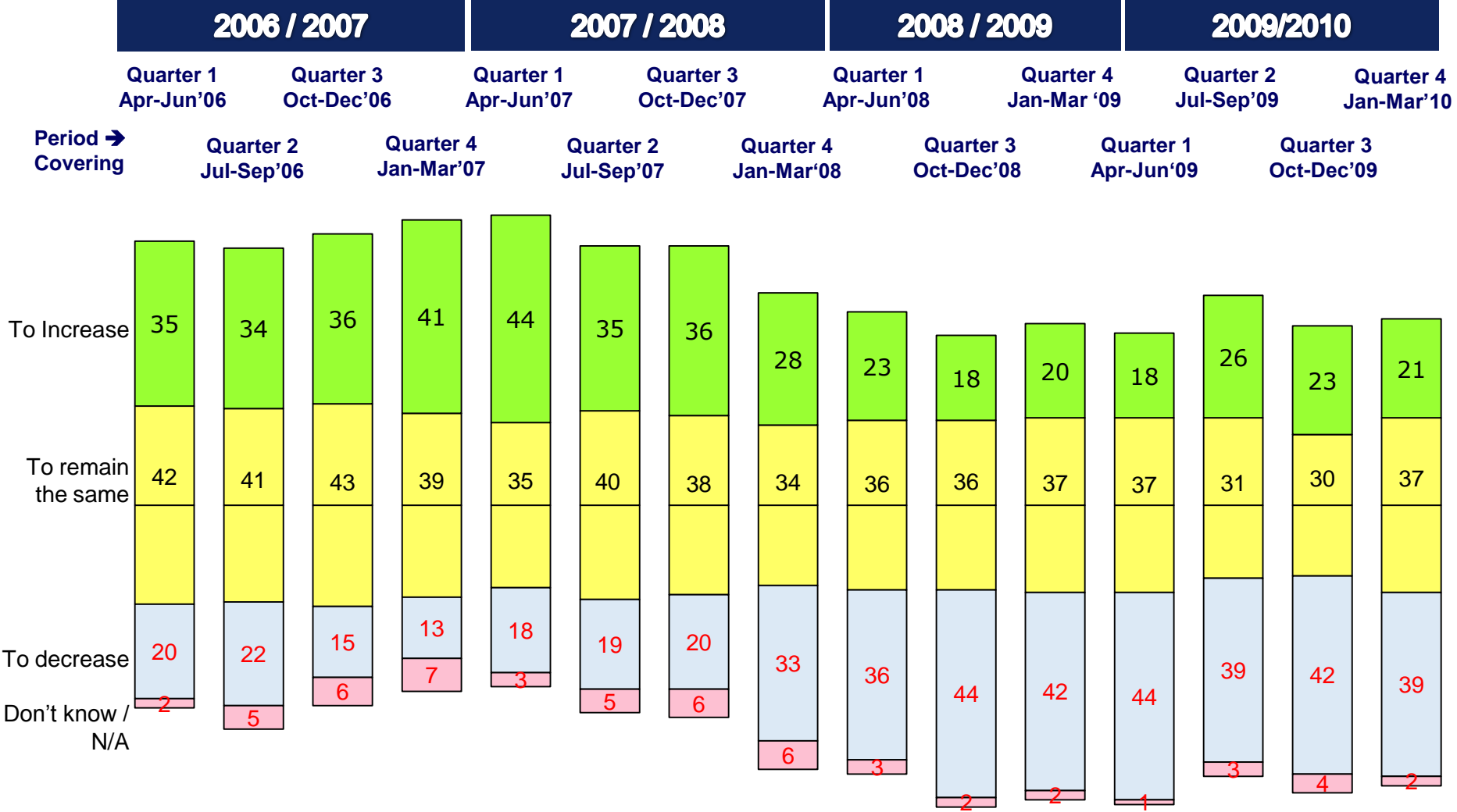
'All Island'



Northern Ireland Specific Business Confidence and Economic Trends

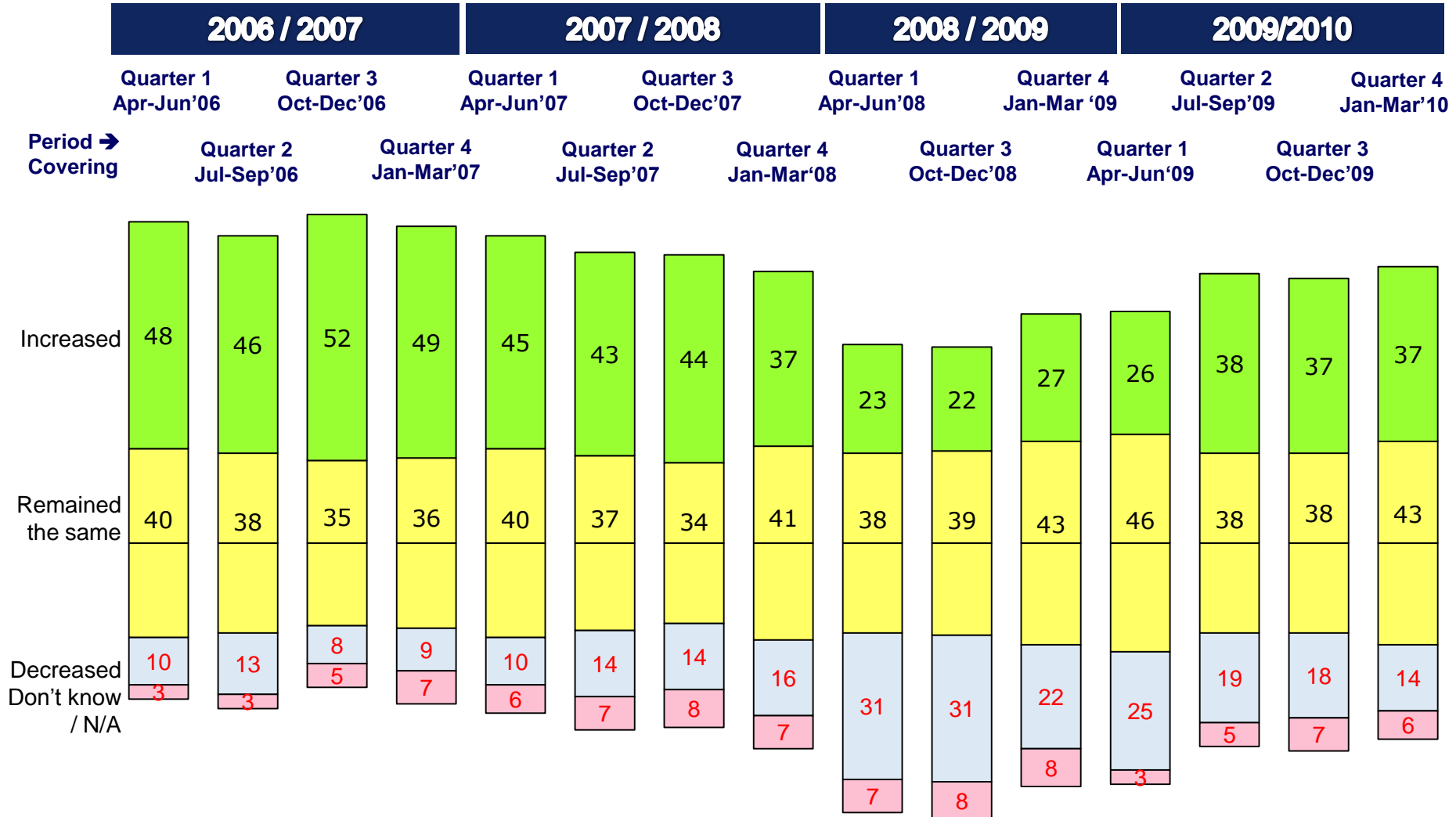
NI – Business Turnover Over Past Quarter Months

[Base: All NI Respondents – n=500 per quarter]



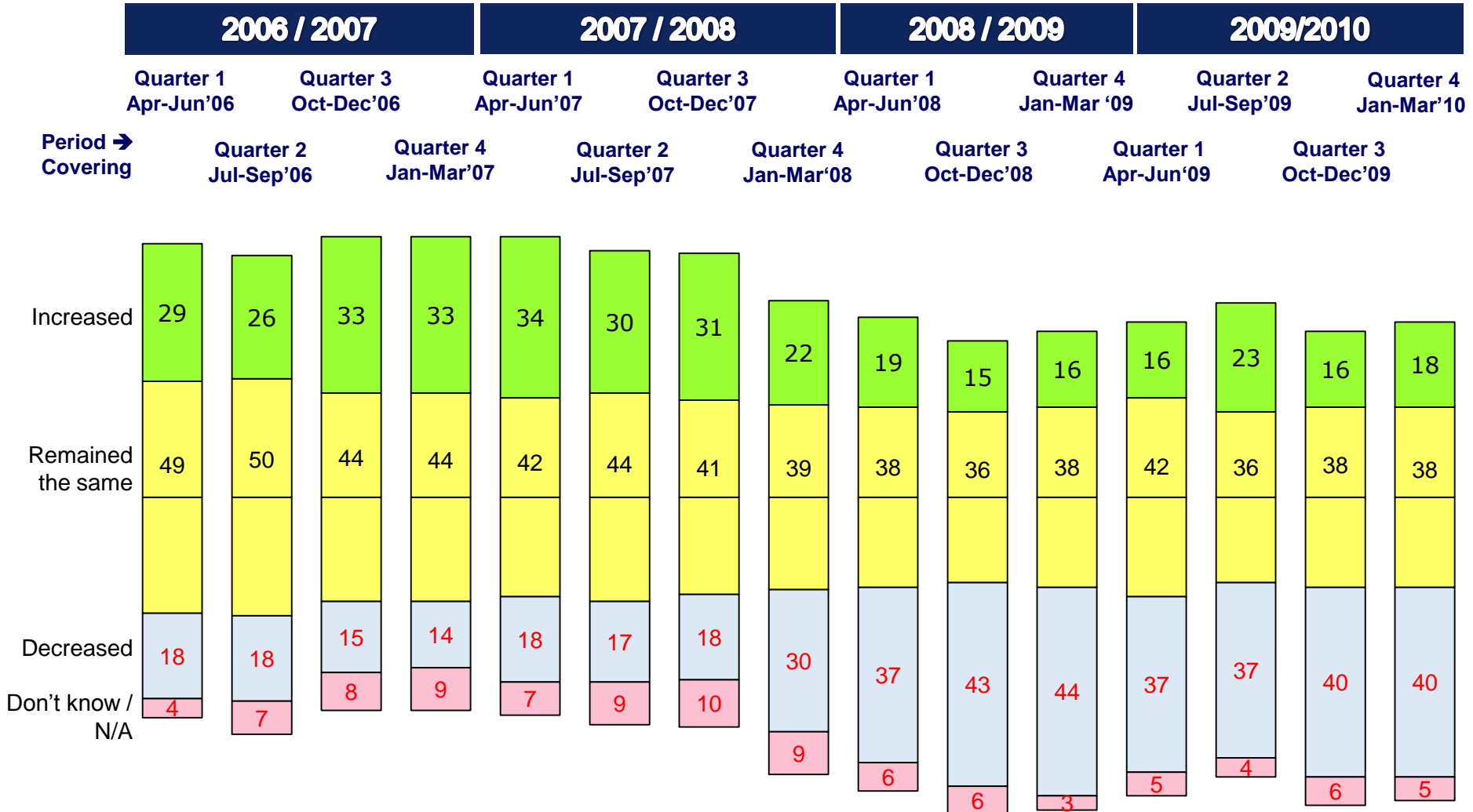
NI – Expectations Of Business Turnover Over Next Quarter Months

[Base: All NI Respondents – n=500 per quarter]



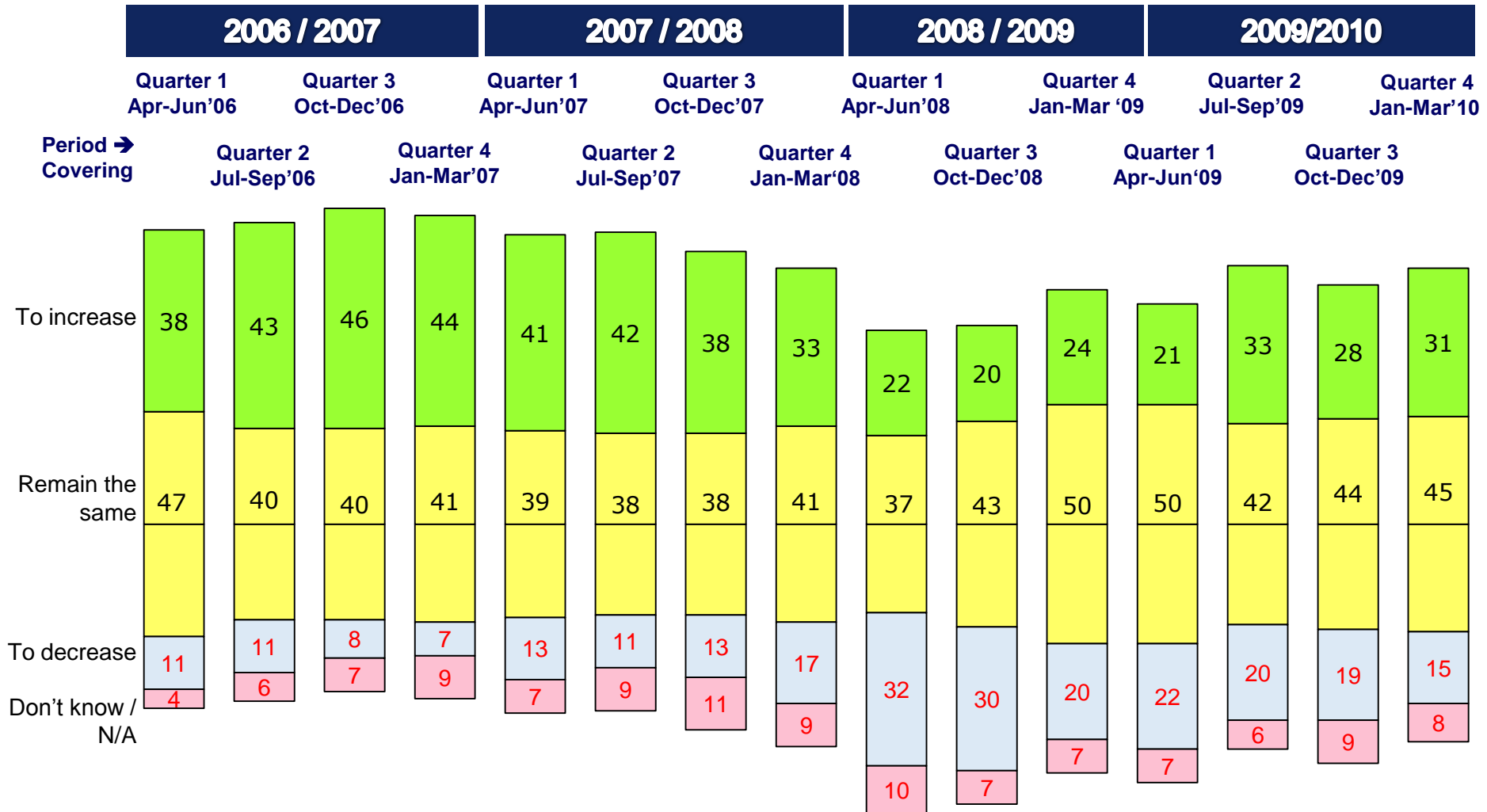
NI – Business Profitability Over Past Quarter

[Base: All NI Respondents – n=500 per quarter]



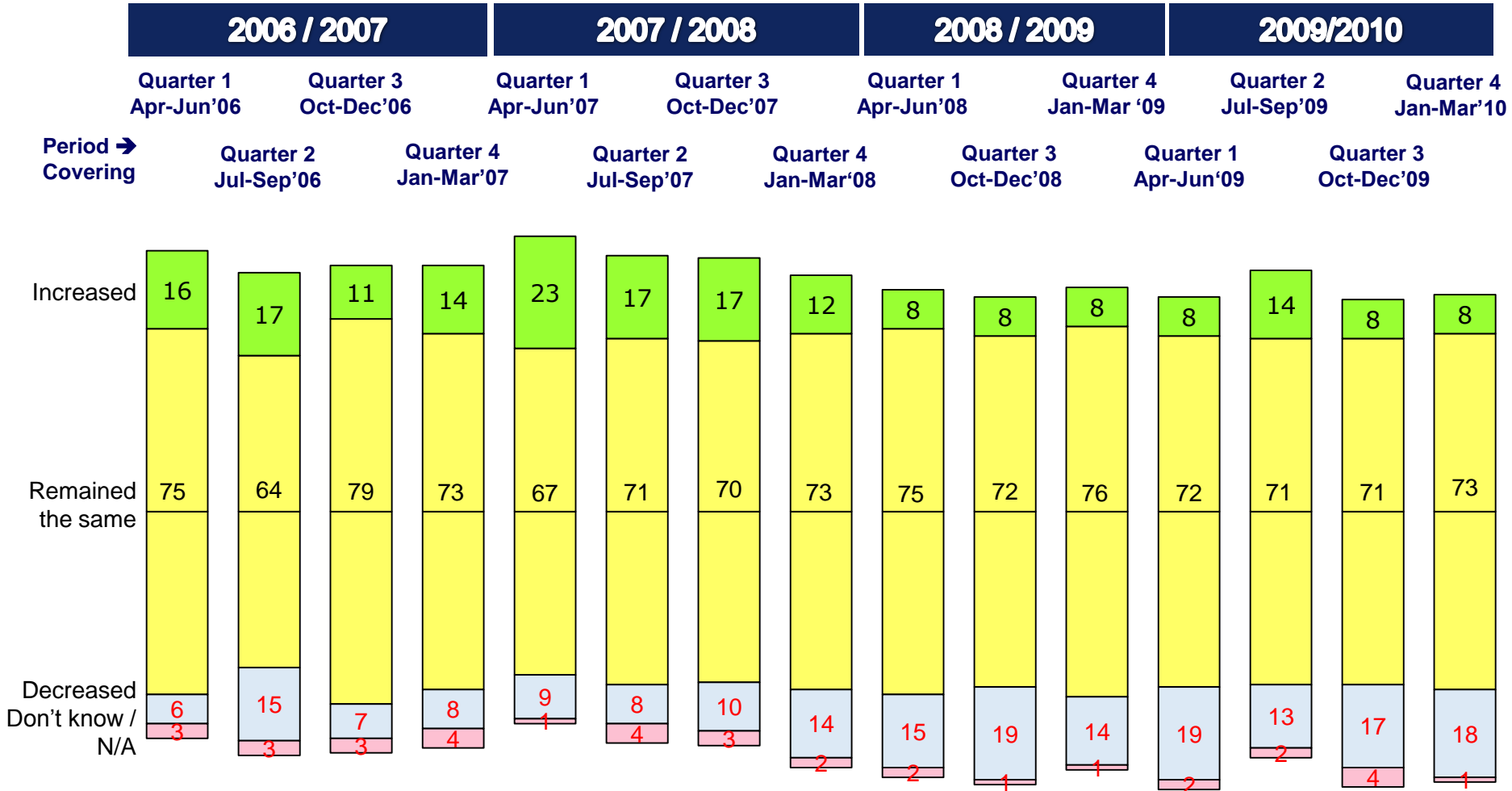
NI – Expectations Of Business Profitability Over The Next Quarter

[Base: All NI Respondents – n=500 per quarter]



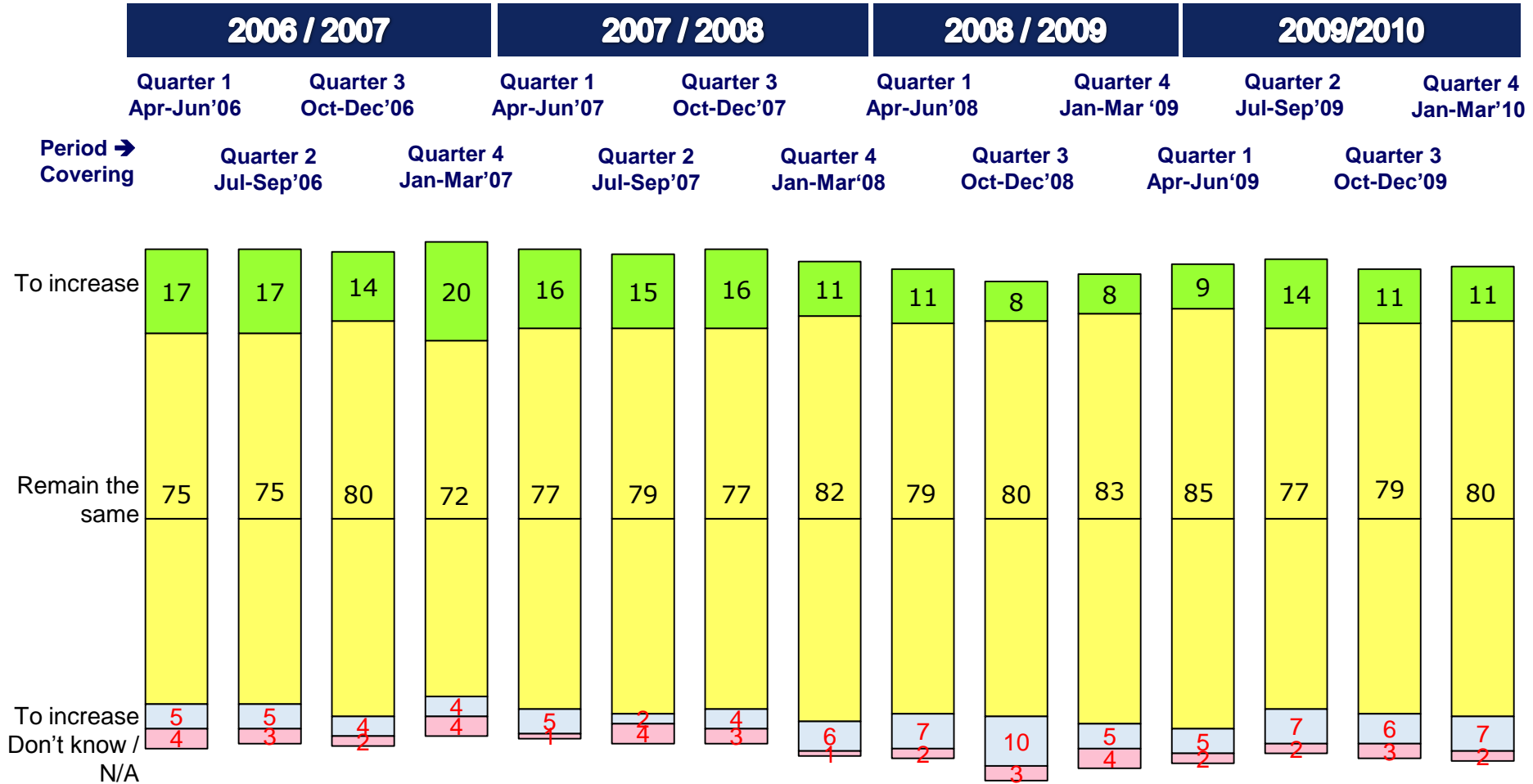
NI – Number Of Employees Over Past Quarter

[Base: All NI Respondents – n=500 per quarter]



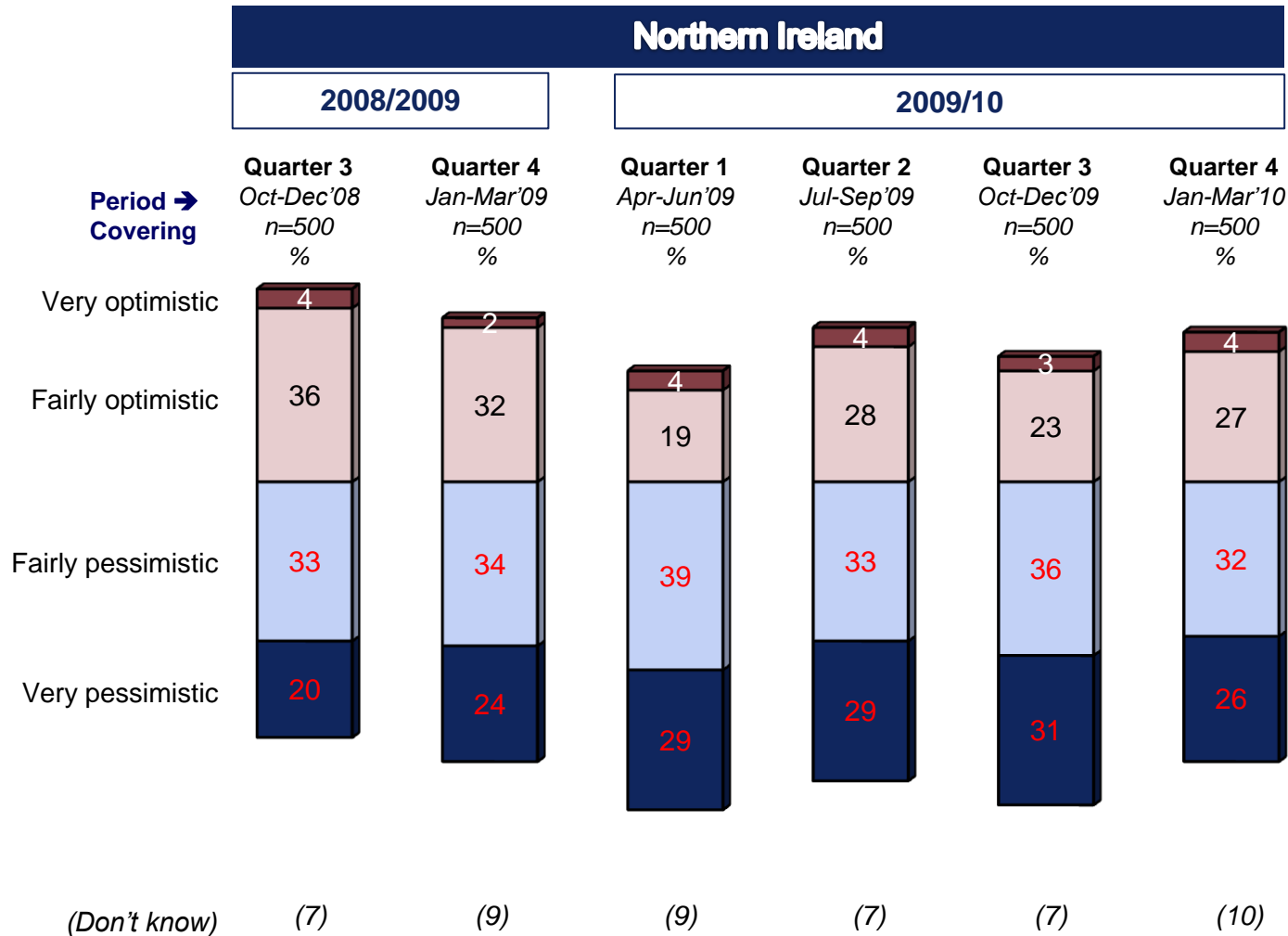
NI – Number Of Employees Over Next Quarter

[Base: All NI Respondents – n=500 per quarter]



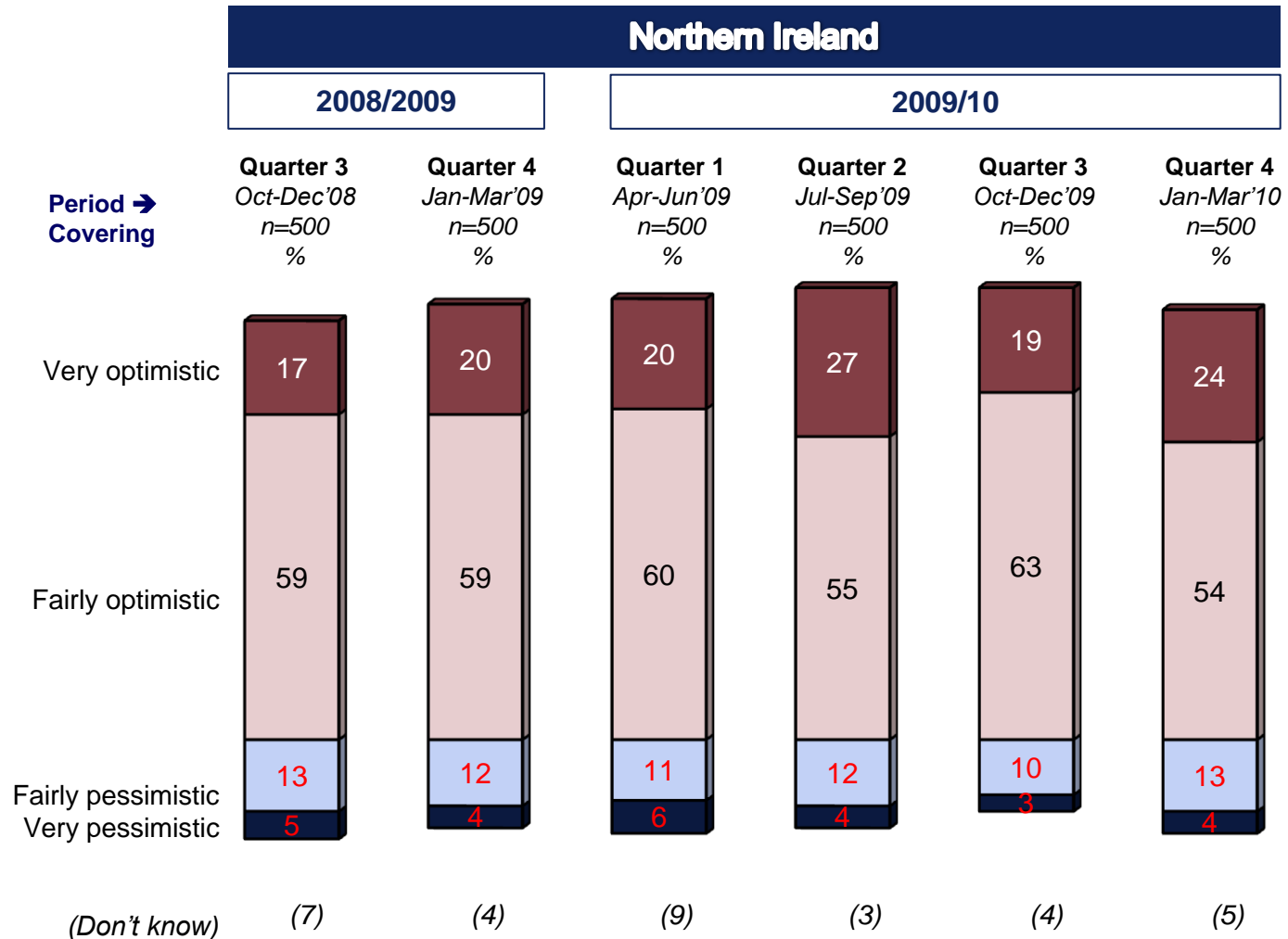
NI – Optimism That Government Will Improve Business Conditions Over The Next 3 Years

[Base: All Respondents – n=500]



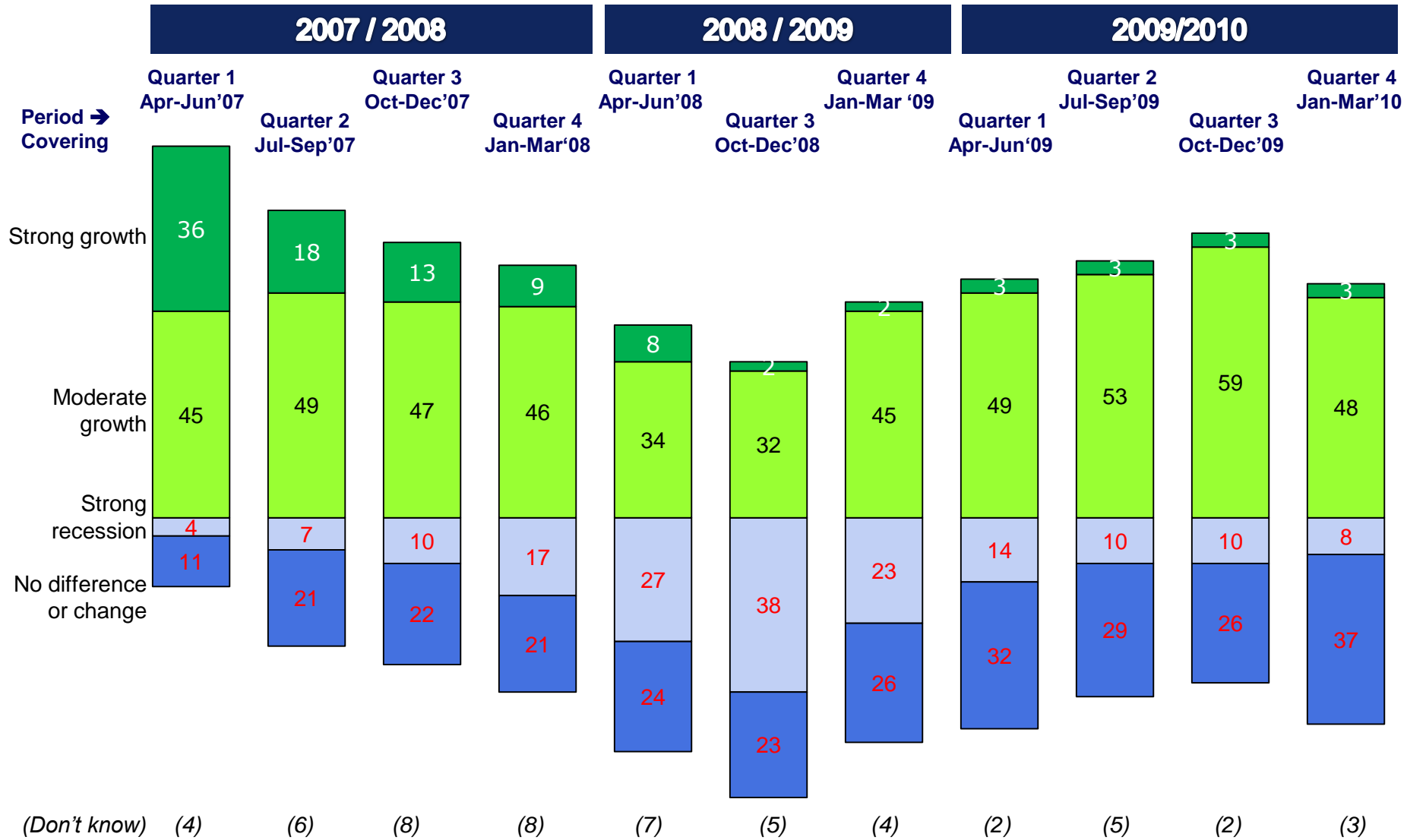
NI – Optimism Regarding Business Performance Over The Next 3 Years

[Base: All Respondents – n=500]



NI – Expectations For NI Economy Over The Next 3 Years

[Base: All Respondents – n=500]



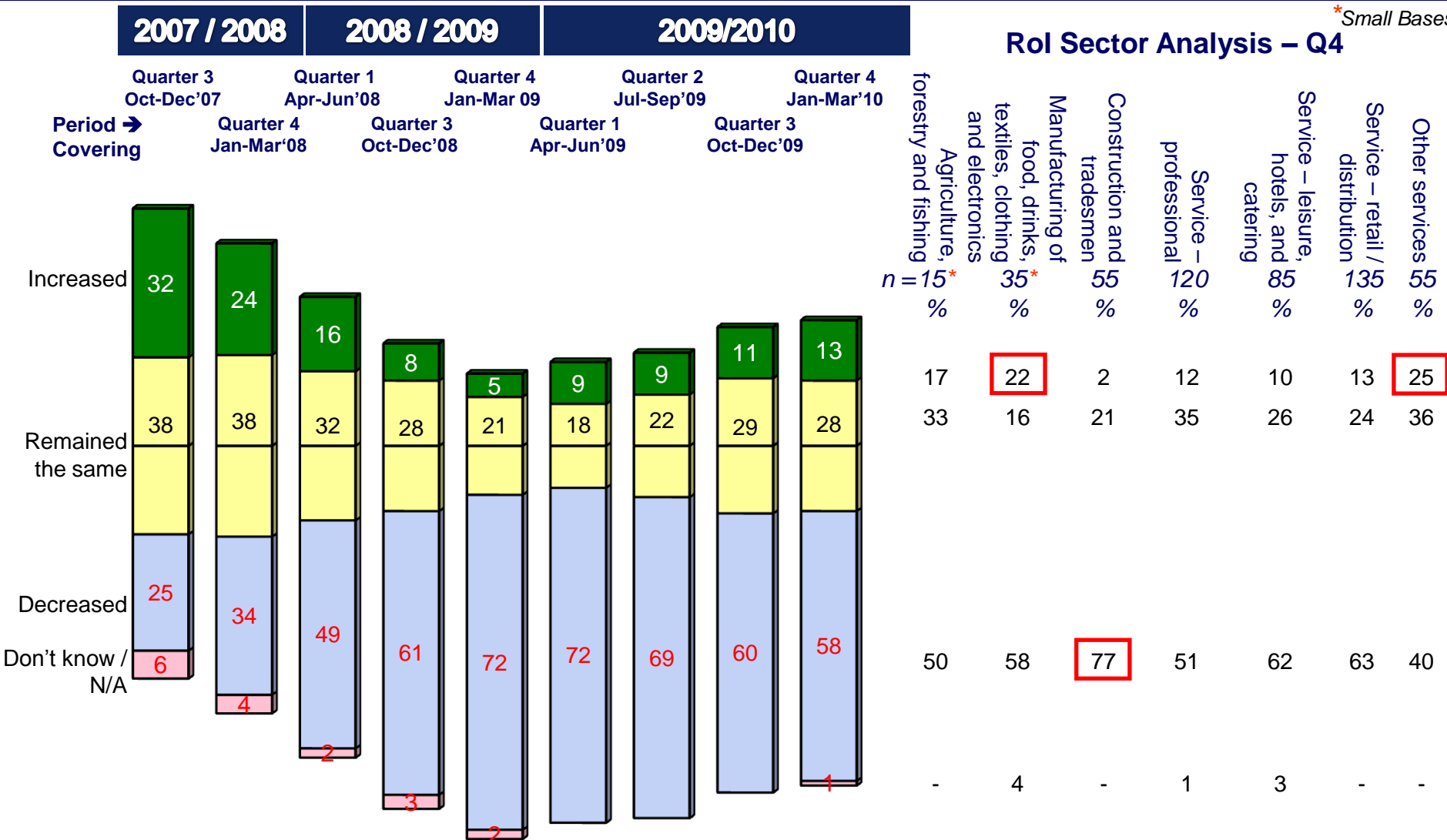
Republic of Ireland Specific Business Confidence and Economic Trends

Rol – Business Turnover Over Past Quarter

[Base: All Respondents – n=500]

*Small Bases

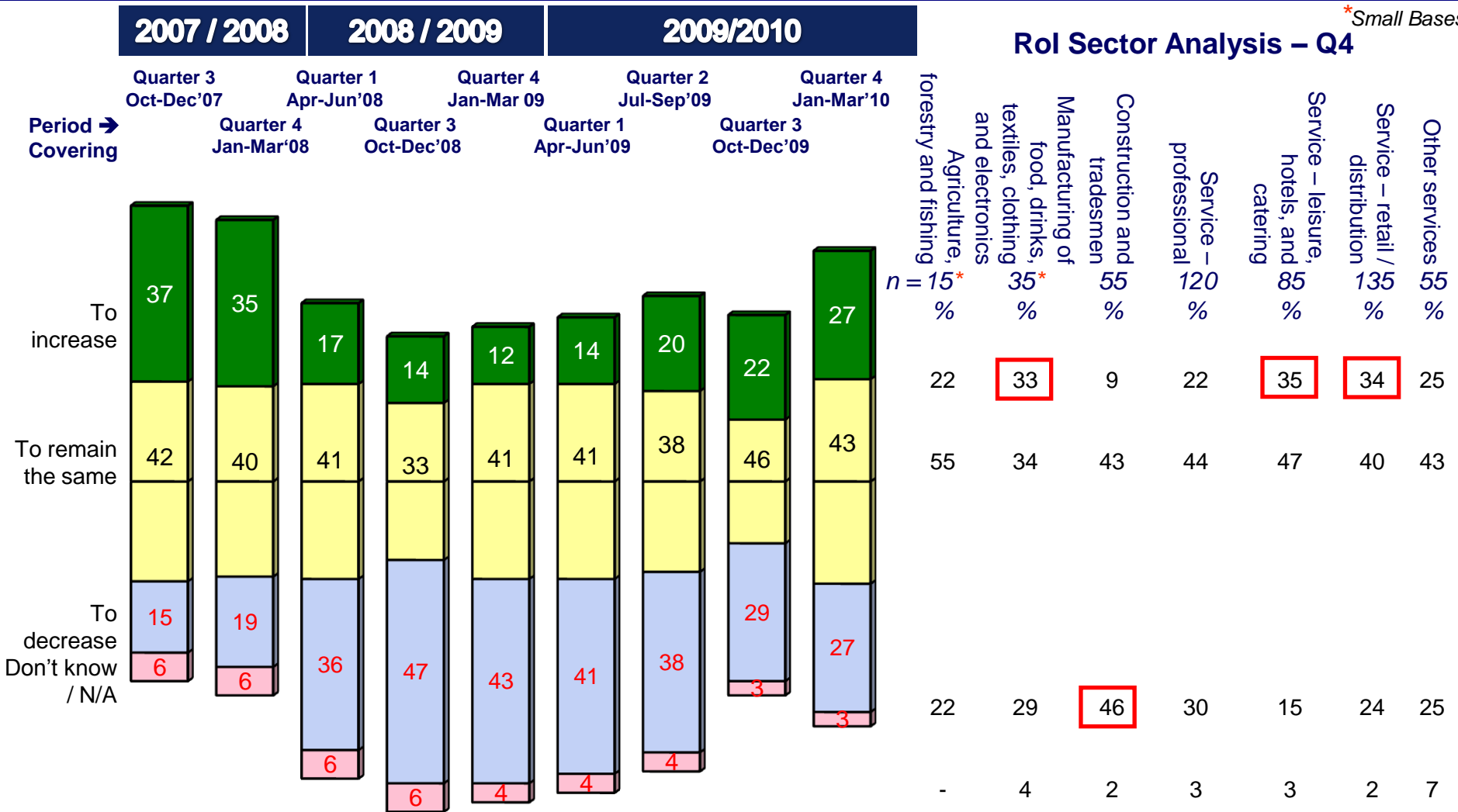
Rol Sector Analysis – Q4



Rol – Expectations Of Business Turnover Next Quarter

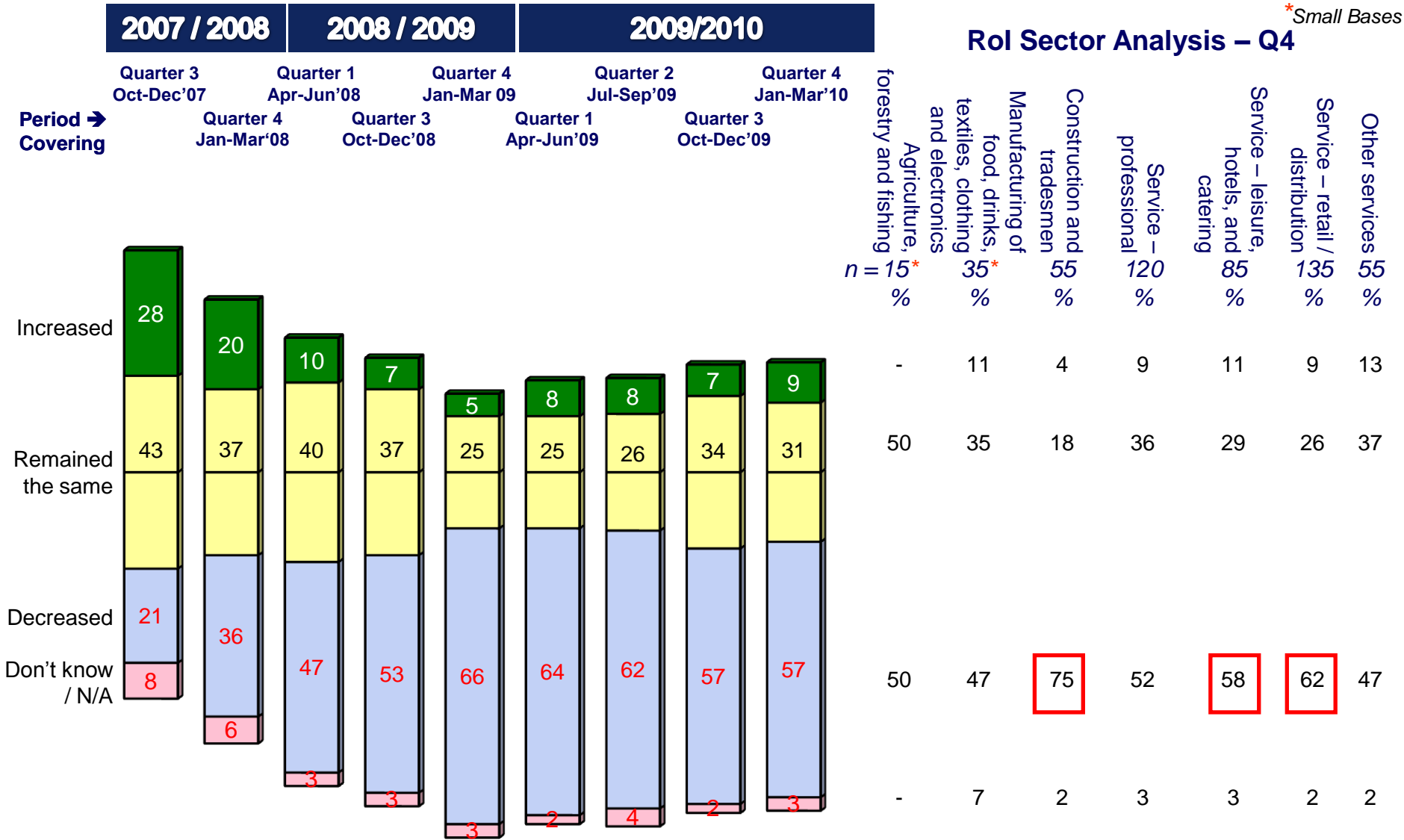
[Base: All Respondents – n=500]

*Small Bases



Rol – Business Profitability Over The Past Quarter

[Base: All Respondents – n=500]

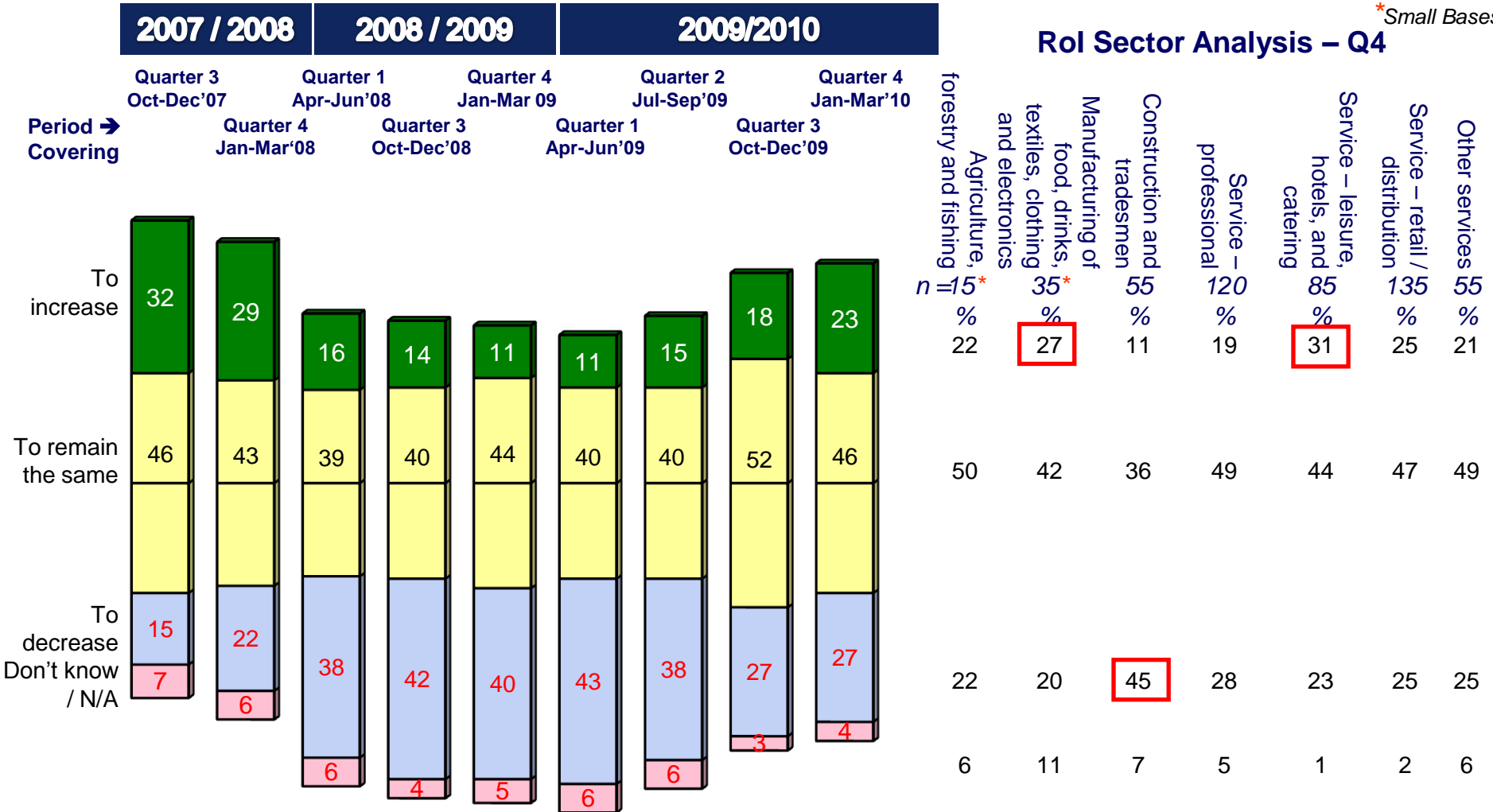


*Small Bases

Rol – Expectations Of Business Profitability Over The Next Quarter

[Base: All Respondents – n=500]

*Small Bases

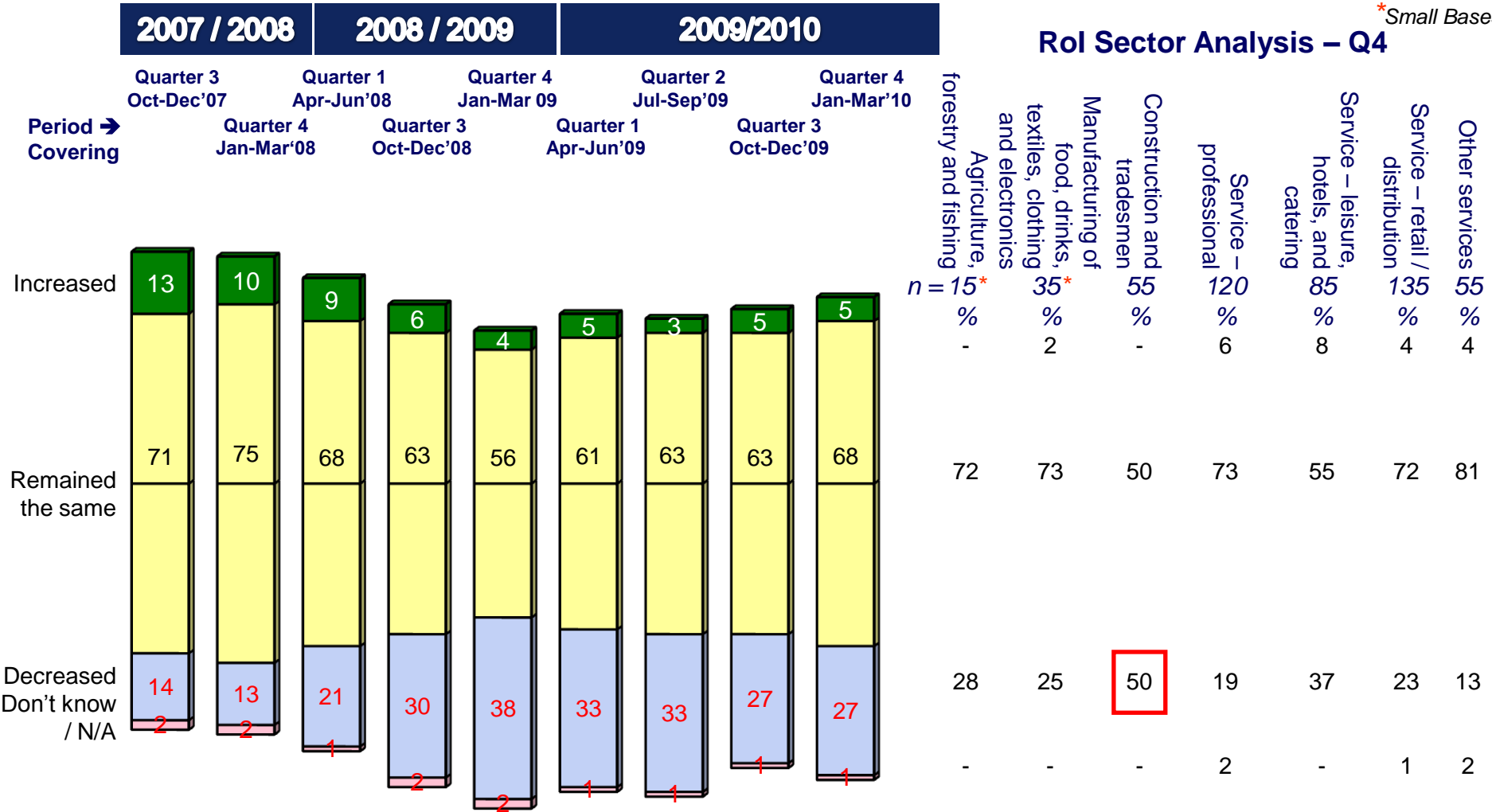


RoI – Number Of Employees Over The Past Quarter

[Base: All Respondents – n=500]

*Small Bases

RoI Sector Analysis – Q4

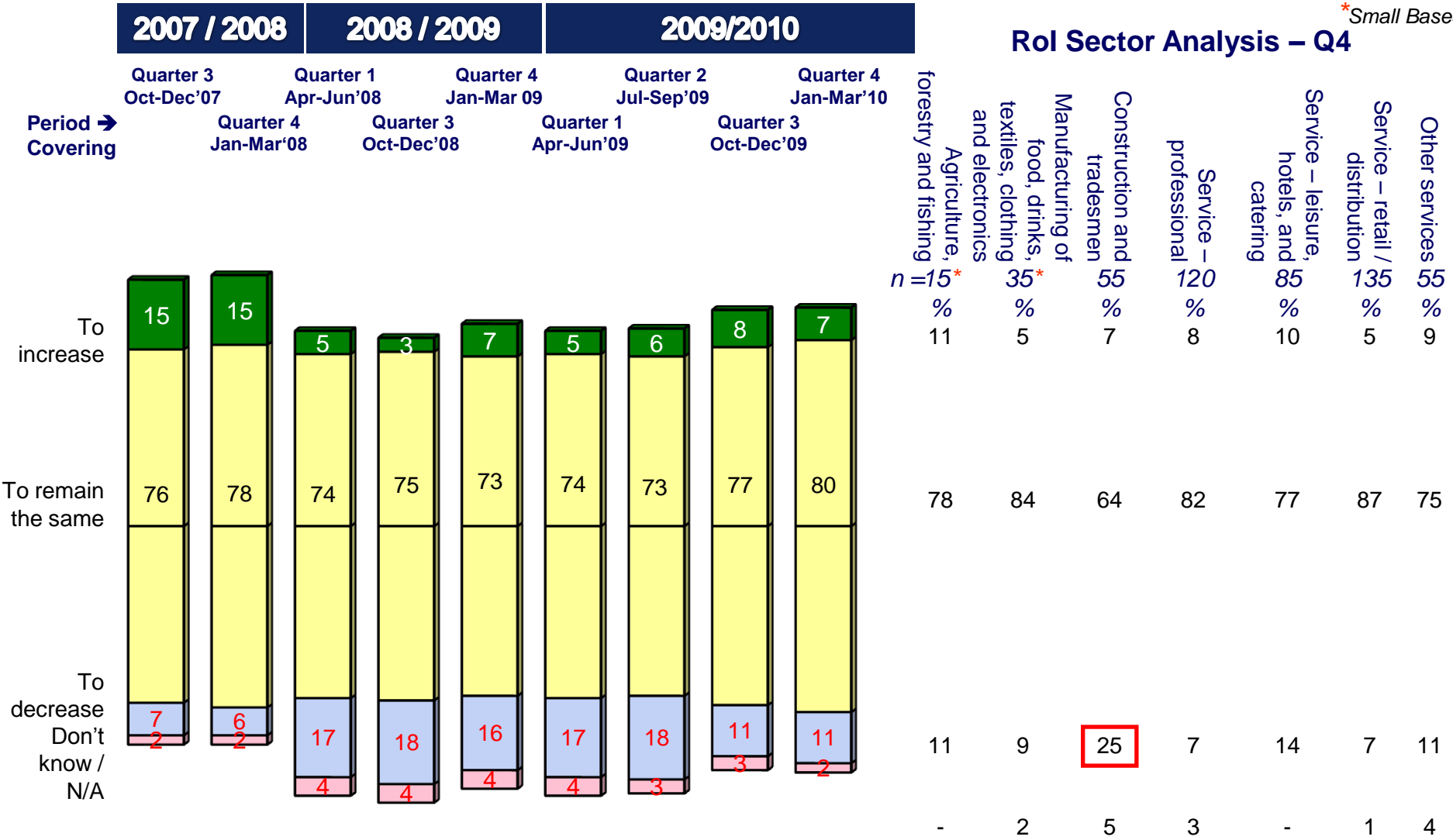


RoI – Expectations Of Number Of Employees Over The Next Quarter

[Base: All Respondents – n=500]

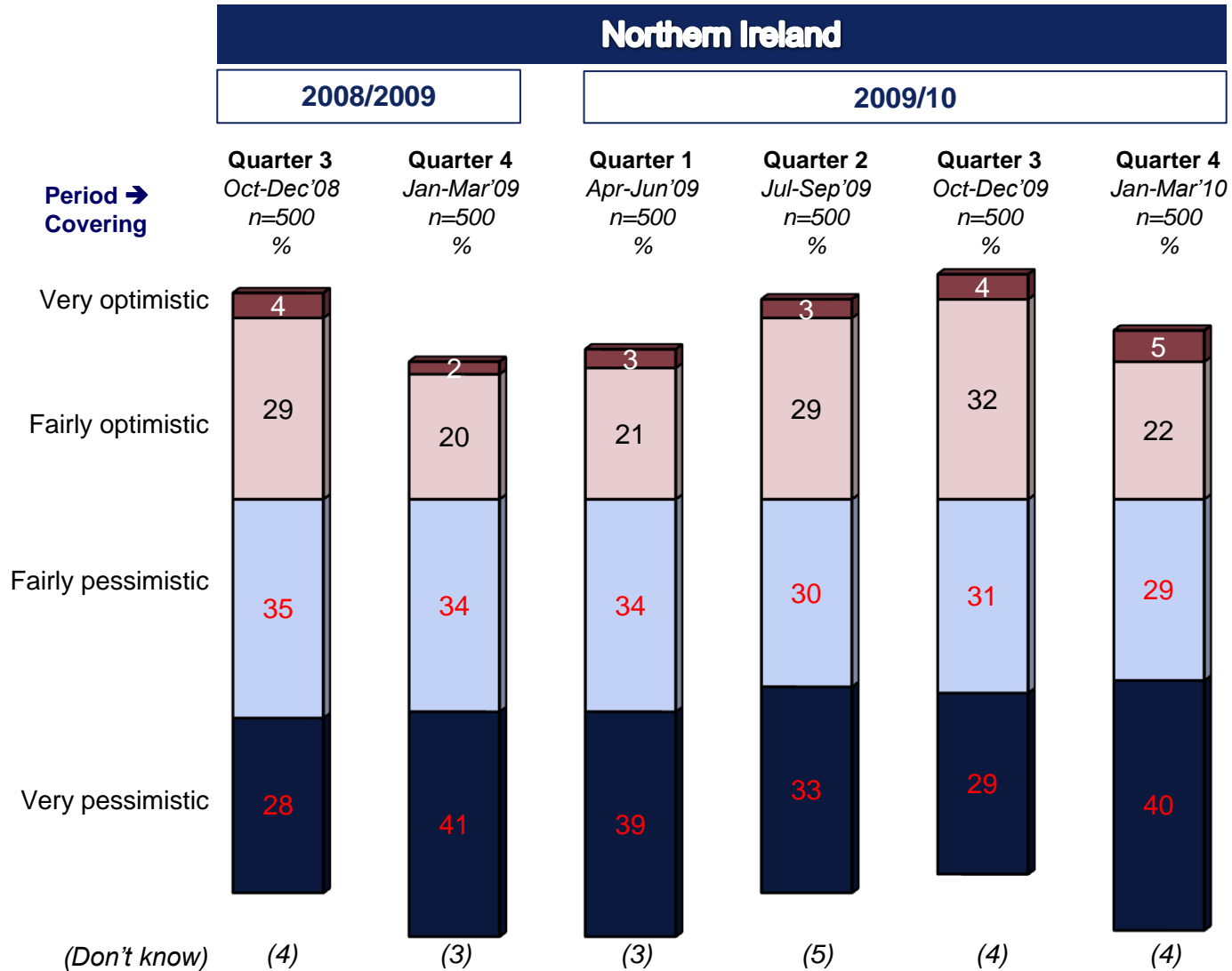
*Small Bases

RoI Sector Analysis – Q4



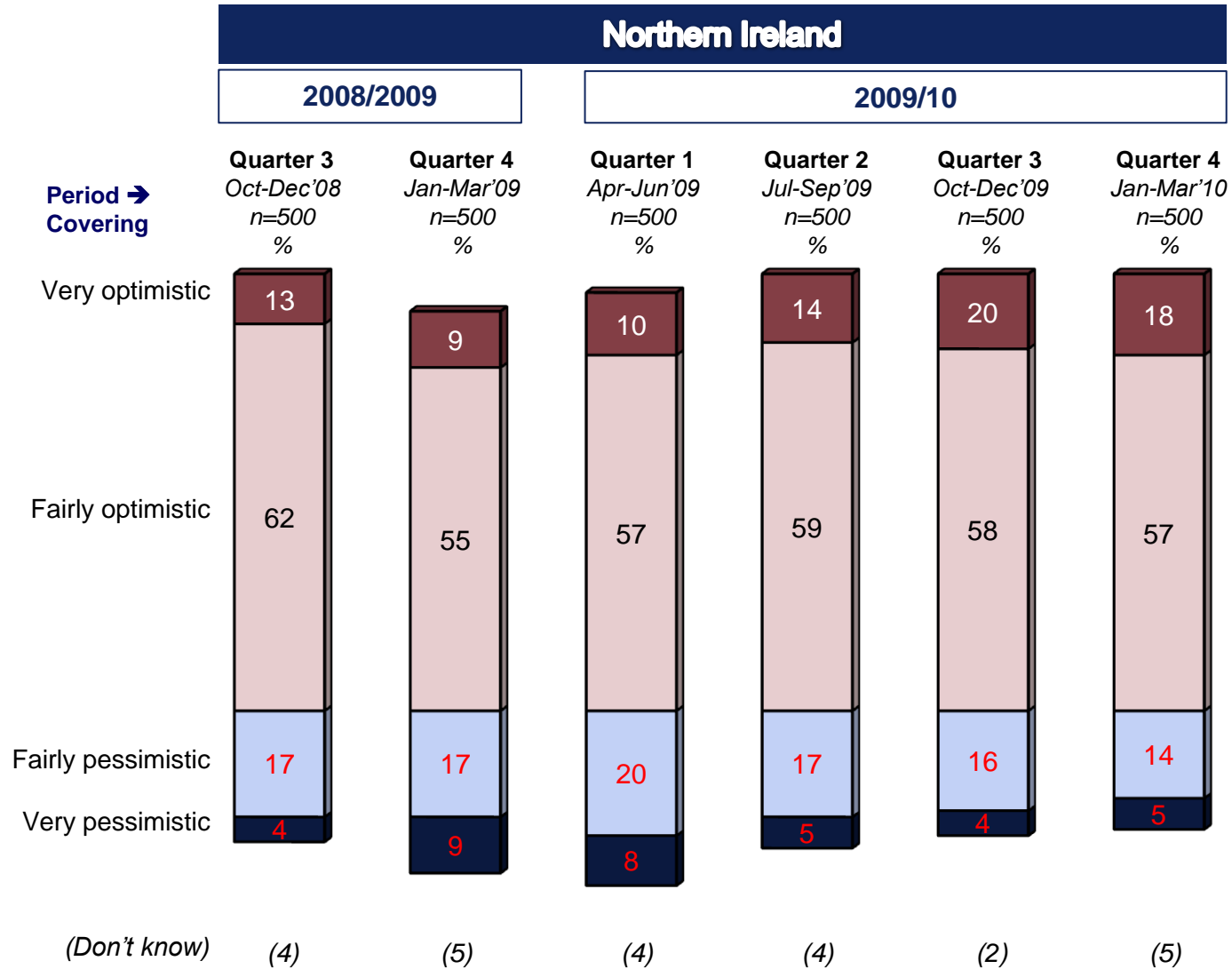
Rol – Optimism That Government Will Improve Business Conditions Over The Next 3 Years

[Base: All Rol Respondents – n=500]



Rol – Optimism Regarding Business Performance Over The Next 3 Years

[Base: All lol Respondents – n=500]



Rol – Expectations For Rol Economy Over The Next 3 Years

[Base: All Respondents – n=500]

