

Potential business impact of ‘loss of the main supplier’ for small and medium enterprises (SMEs) in 2015

Global survey report

November, 2015

Group Marketing & Communications Insights




Potential business impact of 'loss of the main supplier' for SMEs in 2015

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Potential business impact of 'loss of the main supplier' for SMEs in 2015

Method



Telephone Interviews (CATI)
Average length: 6 minutes


Sample structure




200 interviews per country,
representative for SMEs relating to
enterprise size (in terms of
full-time employees) and industry

Target Group

SME
(0-250 Full-time employees)





CEO/Owner, GM,
CFO/Treasurer,
COO/Head of Operations

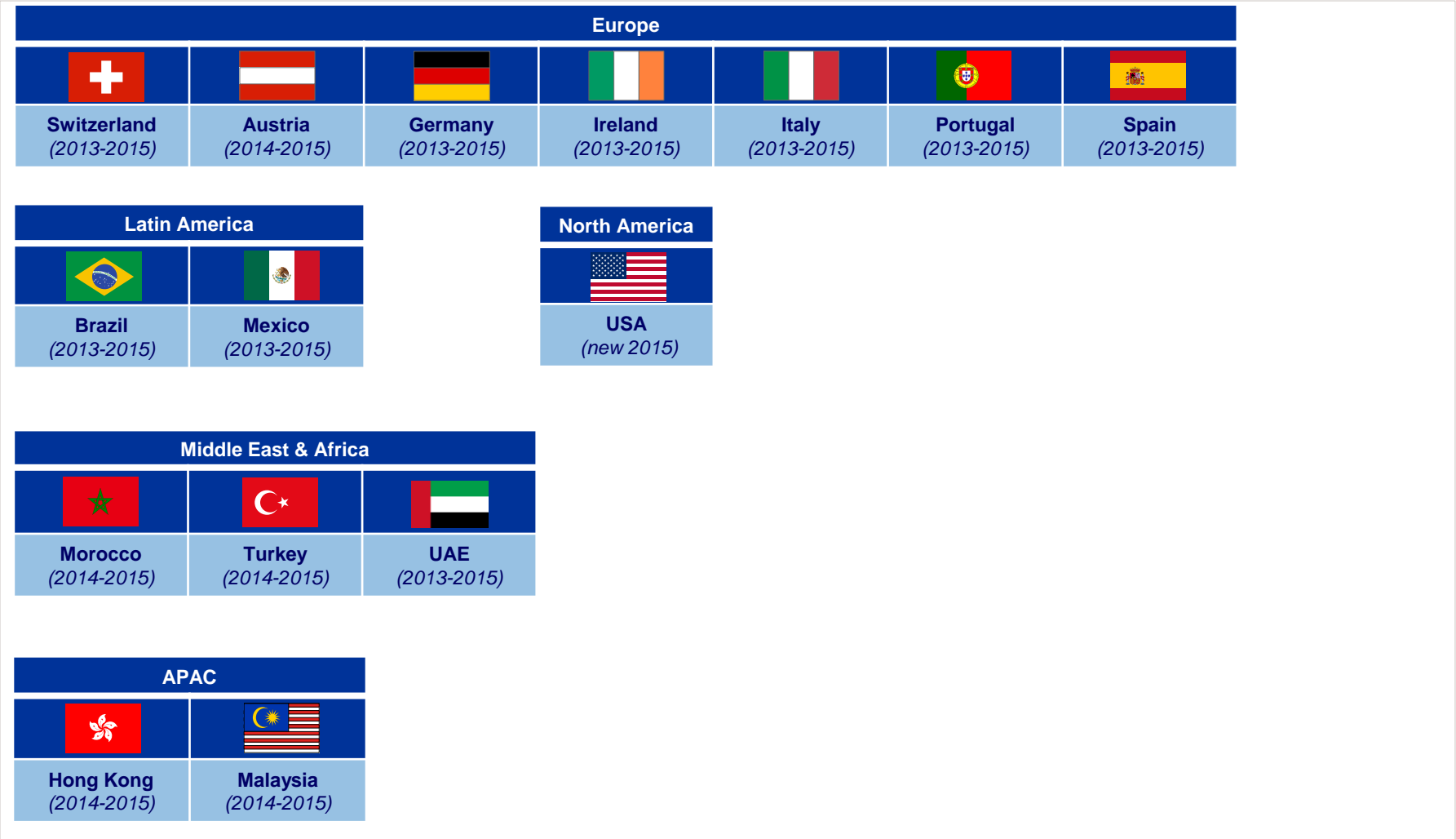
Indication of differences

Illustrative example

	2015 (a)	2014 (b)	2013 (c)
Throughout the report, significant differences (95% confidence level) are highlighted through Letter	17.0 ^{b,c}	8.0	8.8
Codes which indicate the comparison data set	14.5	20.5	33.2 ^{ab}
	29.5 ^c	28.5 ^c	17.6
	9.5	10.0 ^c	4.8
	8.5	5.0	6.4

Project design

Potential business impact of 'loss of the main supplier' for SMEs in 2015



Management summary

Potential business impact of 'loss of the main supplier' for small and medium enterprises (SMEs) in 2015



Management Summary – 2015 global and regional results highlights

Potential business impact of 'loss of the main supplier' for SMEs in 2015

2015 global results

- i) **55%** of SMEs around the globe claim **not be affected** at all if they were to lose their main supplier.
- ii) Another **26%** see only **limited business impact** resulting from a 'loss of the main supplier'.
- iii) Roughly **1 out of 7 (13.7%)** see their business being **significantly impacted** were they to lose their main supplier.
- iv) In a comparison of the different regions, response patterns are similar – re-confirmed by almost **identical rankings**

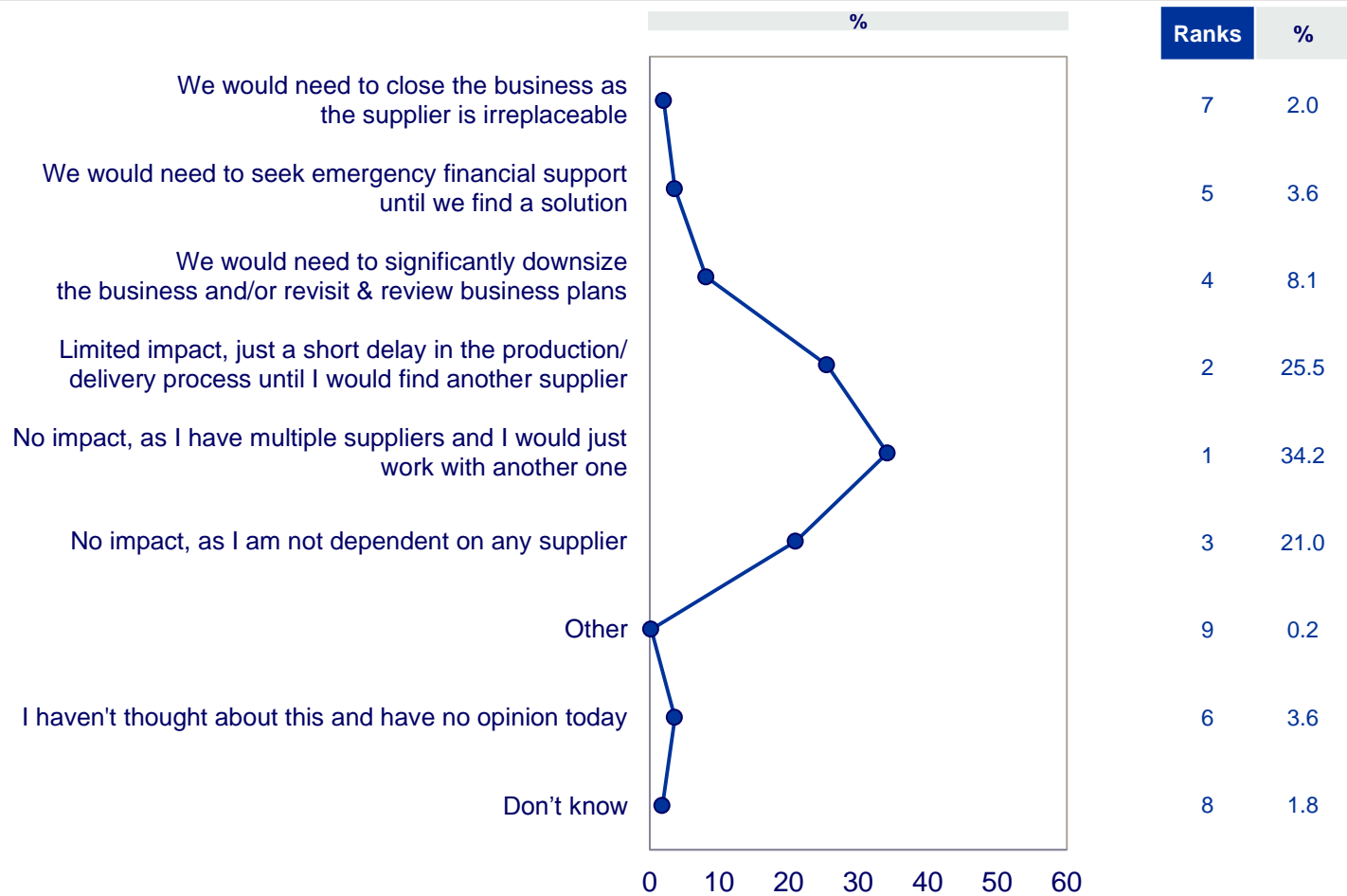
Global results

Potential business impact of 'loss of the main supplier' for small and medium enterprises (SMEs) in 2015



For 2 out of 3 SMEs the loss of the most important supplier would hardly influence their day-to-day business

Potential business impact of 'loss of the main supplier' for SMEs in 2015
 Statistics in % and ranks / all countries



Q4: Thinking about your suppliers now. What impact would it have on your business if you lost your most important supplier? Base: n=[] ● 2015 (n=3000)

Results by region

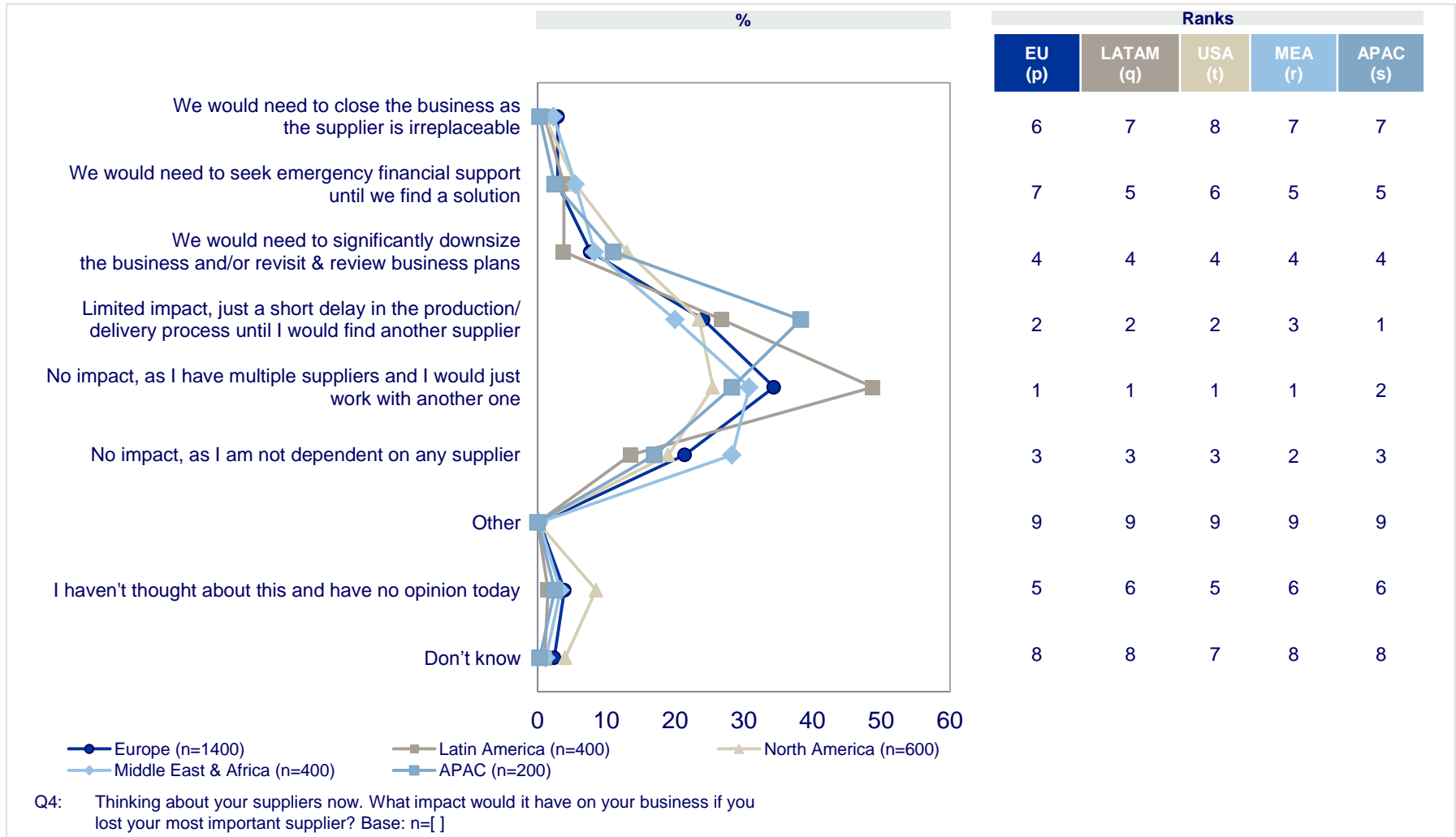
Potential business impact of 'loss of the main supplier' for small and medium enterprises (SMEs) in 2015



Regional comparison: response patterns are similar and re-confirmed by almost identical rankings

Potential business impact of 'loss of the main supplier' for SMEs in 2015

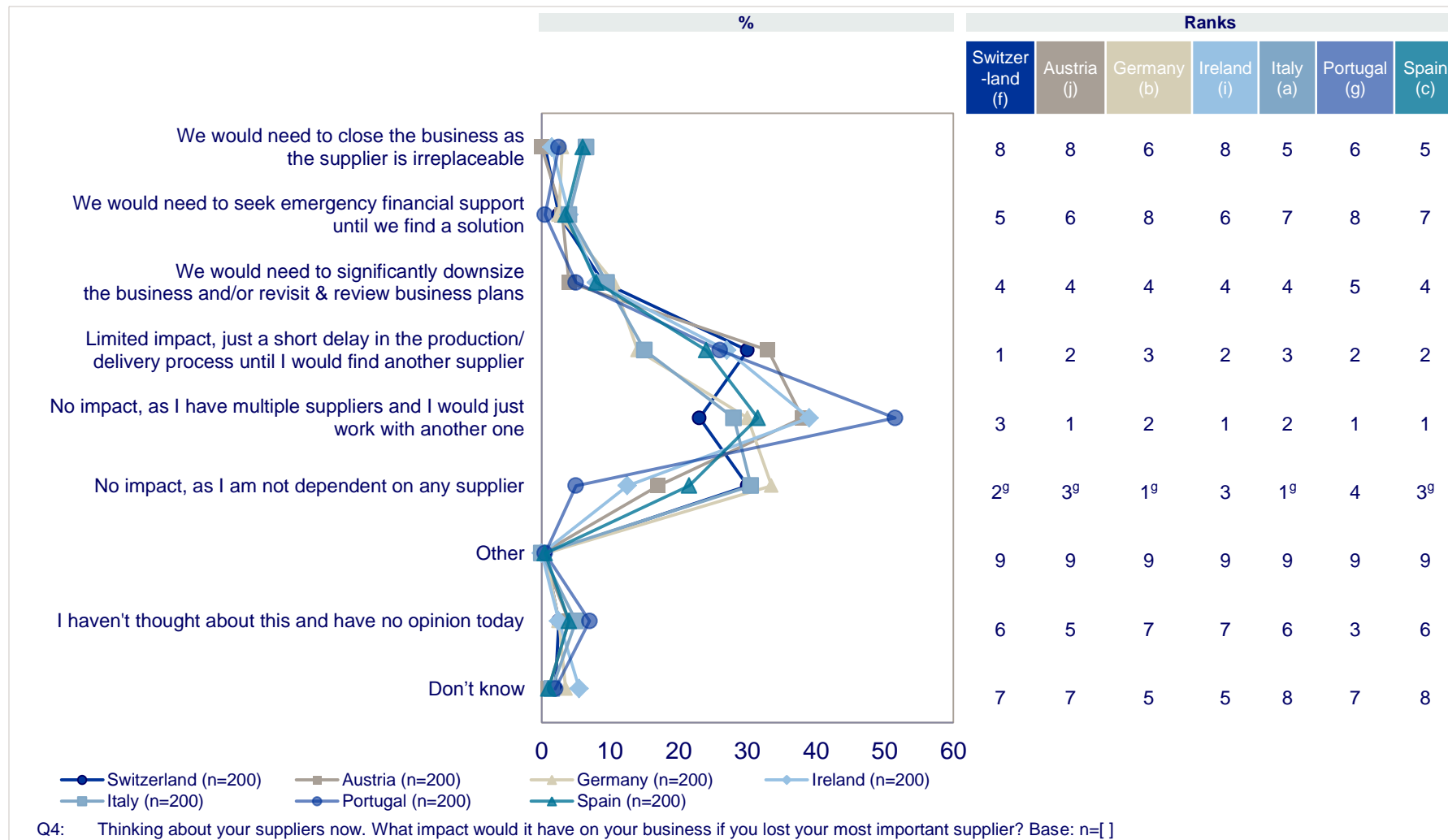
Regional comparison / statistics in % and ranks



In EUROPE: Relatively speaking, the dependency on one supplier seems to be highest for SMEs in Portugal

Potential business impact of 'loss of the main supplier' for SMEs in 2015

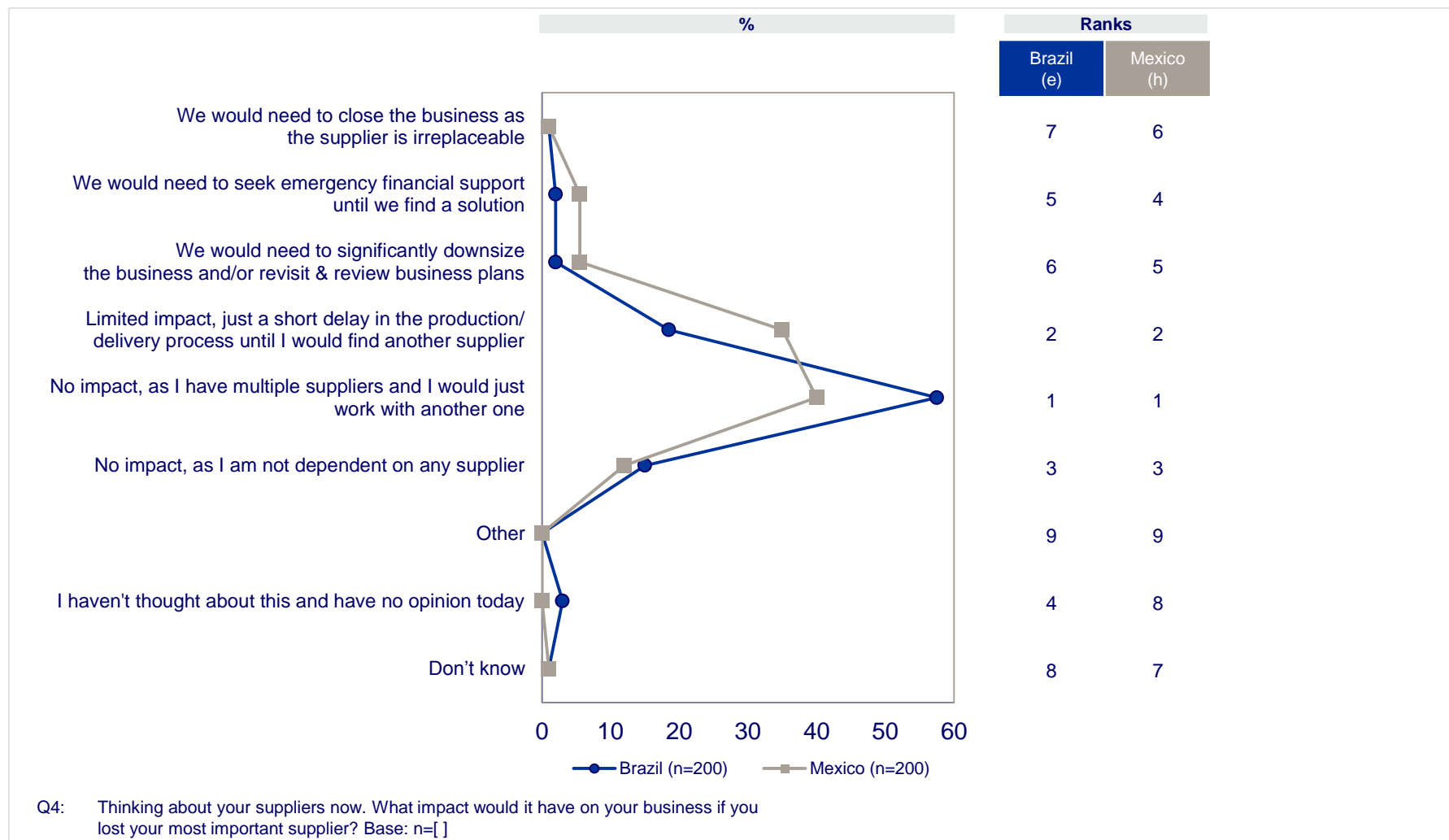
Europe / statistics in % and ranks



In LATAM: Losing the main supplier would not impact the business of SMEs, neither in Brazil nor in Mexico

Potential business impact of 'loss of the main supplier' for SMEs in 2015

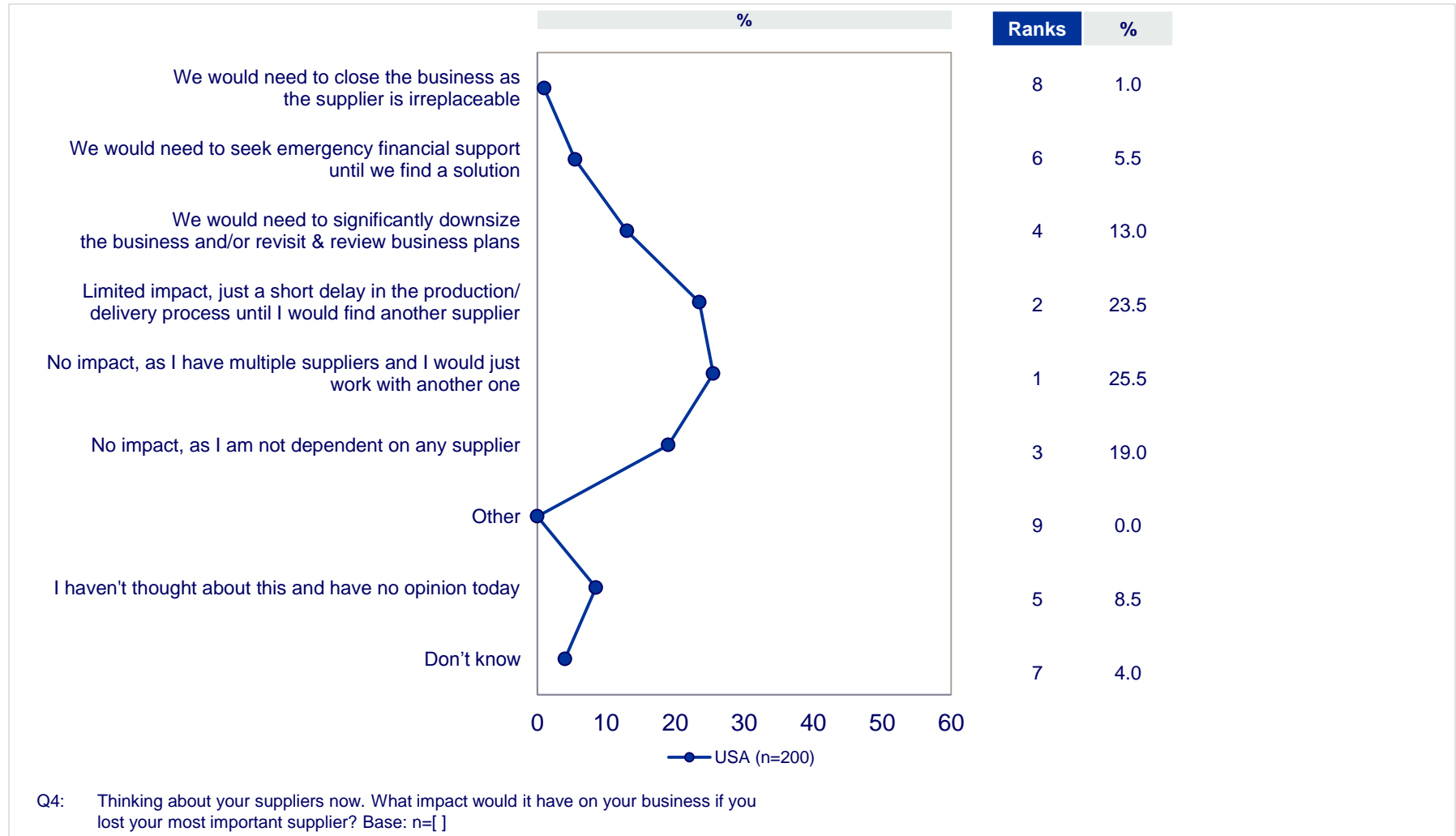
Latin America / statistics in % and ranks



In the USA: If any impact, losing a key supplier would just lead to a short delay in the production or delivery process

Potential business impact of 'loss of the main supplier' for SMEs in 2015

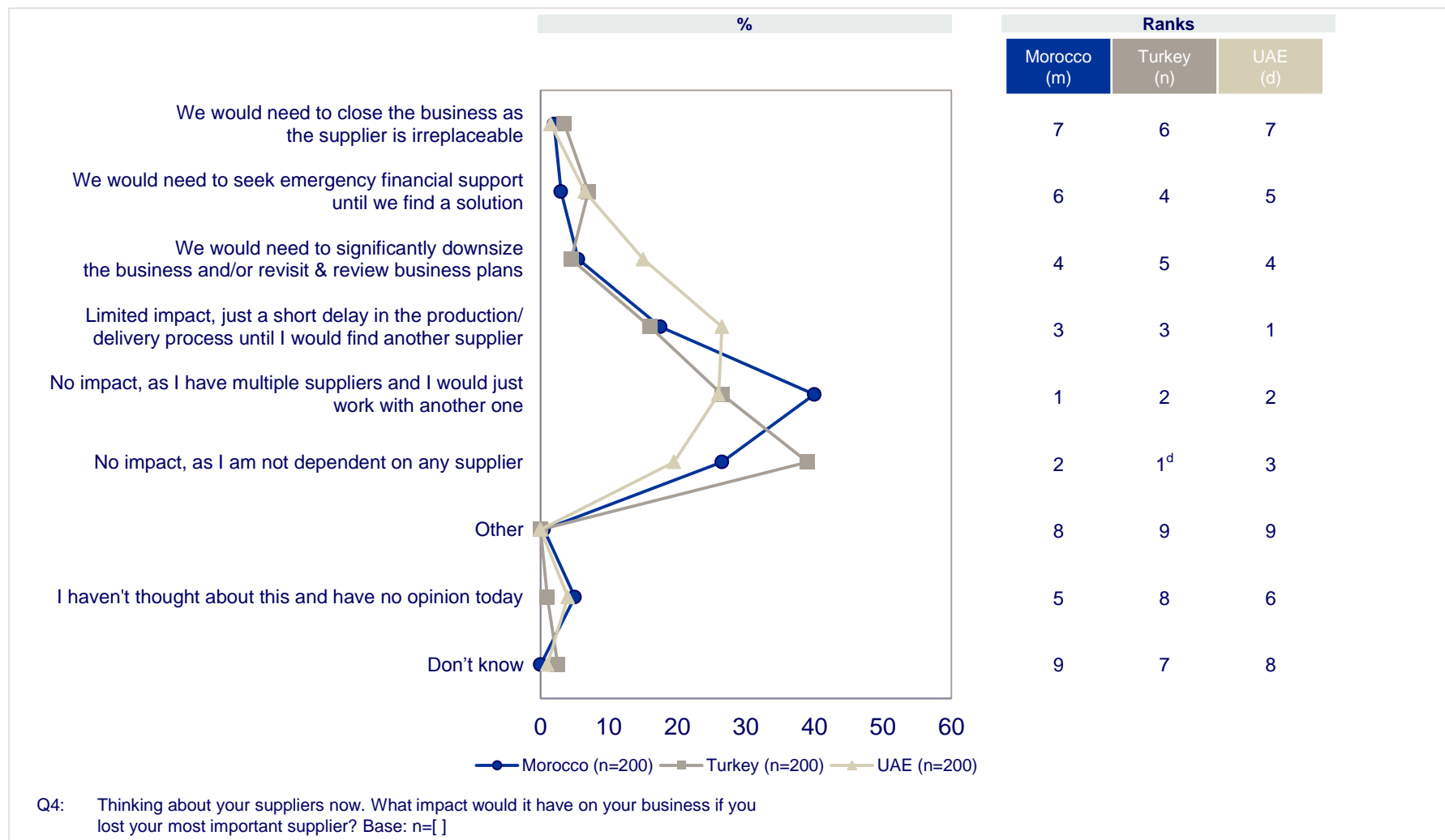
USA / statistics in % and ranks



In MEA: SMEs in UAE are more dependent on one supplier compared to their peers in Turkey

Potential business impact of 'loss of the main supplier' for SMEs in 2015

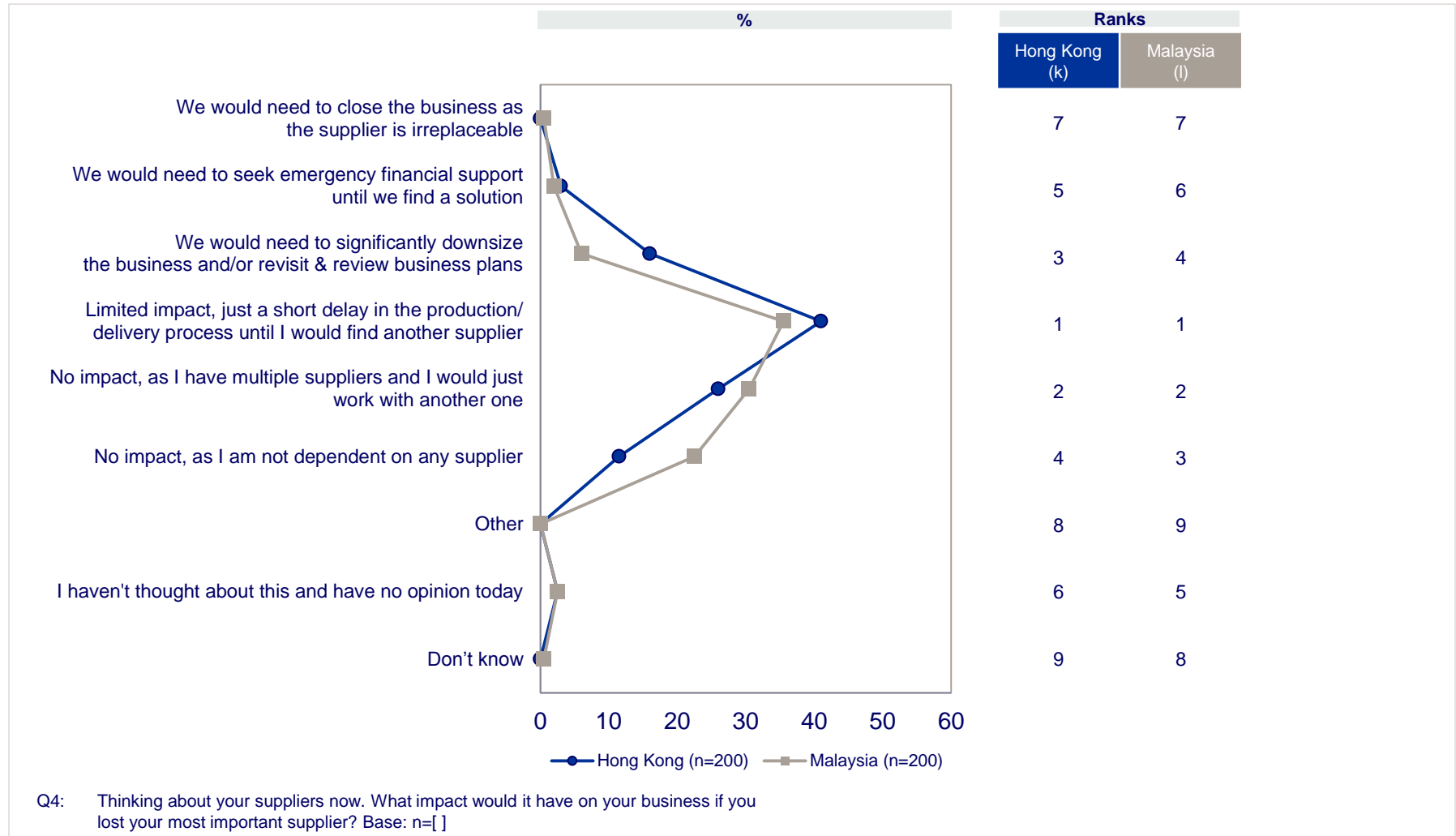
Middle East and Africa / statistics in % and ranks



In APAC: Loss of main supplier would have the same (limited) impact in both Hong Kong and Malaysia

Potential business impact of 'loss of the main supplier' for SMEs in 2015

APAC / statistics in % and ranks



Results by country

Potential business impact of 'loss of the main supplier' for small and medium enterprises (SMEs) in 2015



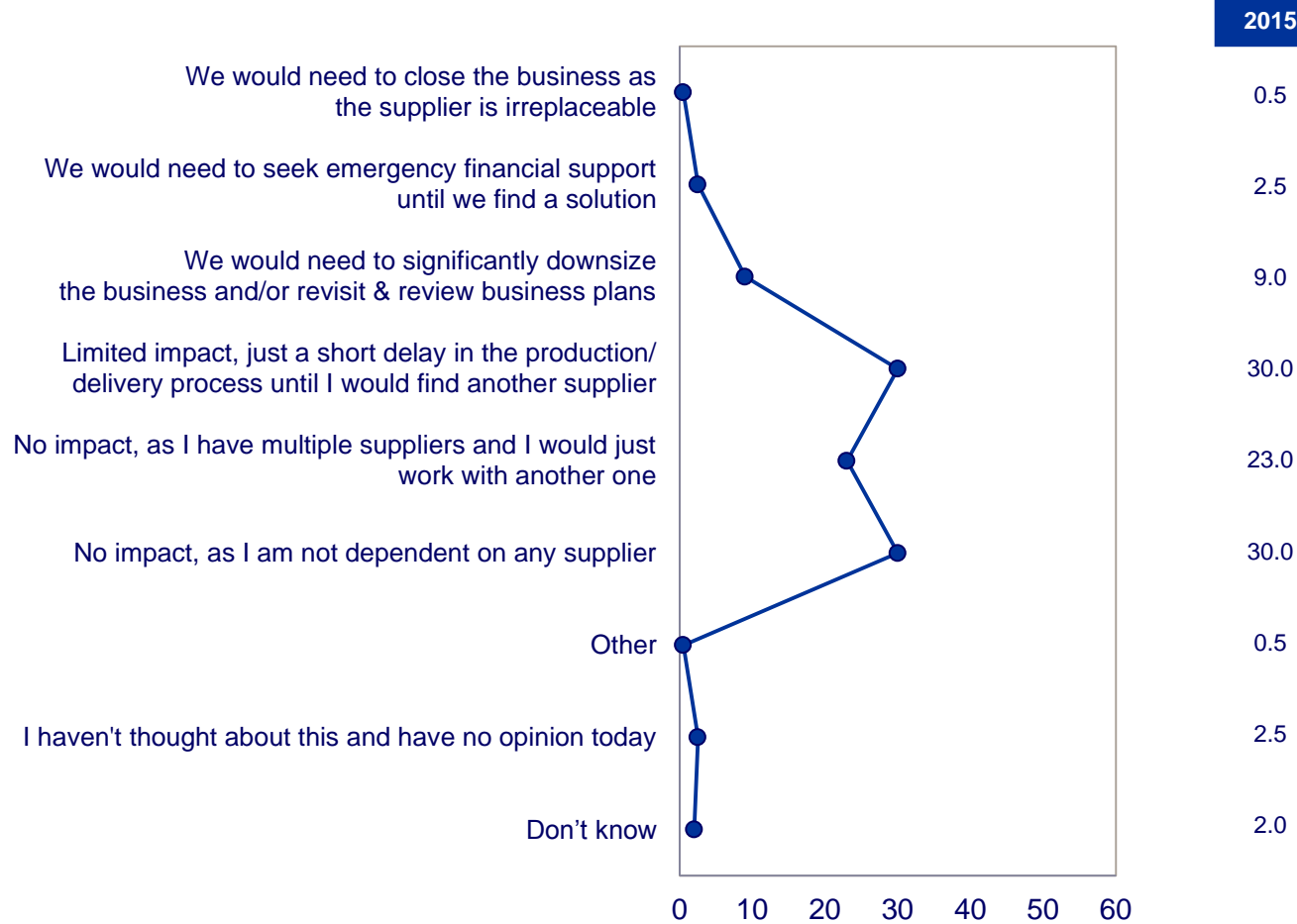
SMEs in Switzerland have little worry about losing their main suppliers

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



Switzerland



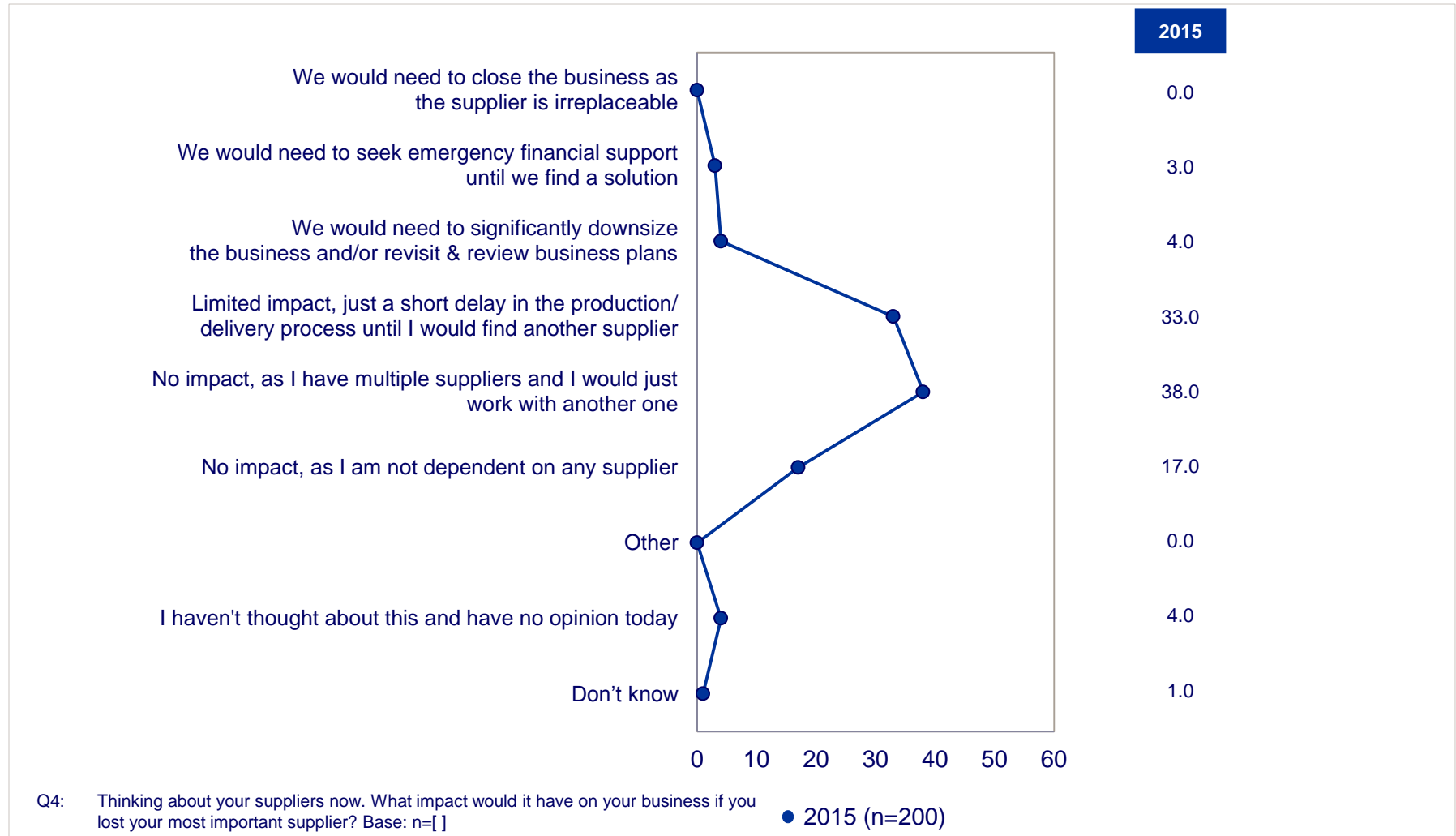
Q4: Thinking about your suppliers now. What impact would it have on your business if you lost your most important supplier? Base: n=[]

● 2015 (n=200)

For more than half of the SMEs surveyed, the loss of a main supplier would have no influence on their own business

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



SMEs in Germany have little worry about losing their main suppliers

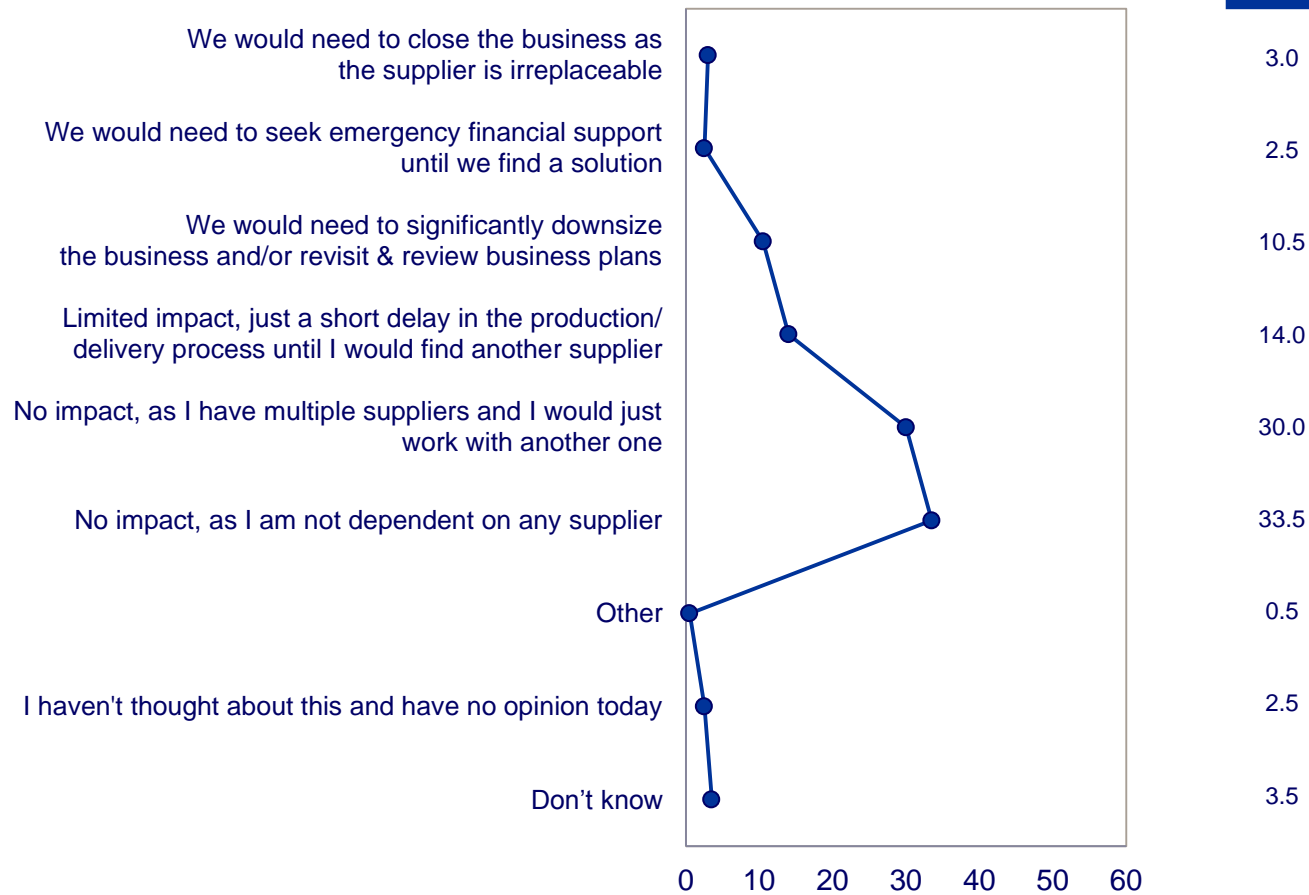
Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



Germany

2015



Q4: Thinking about your suppliers now. What impact would it have on your business if you lost your most important supplier? Base: n=[] ● 2015 (n=200)

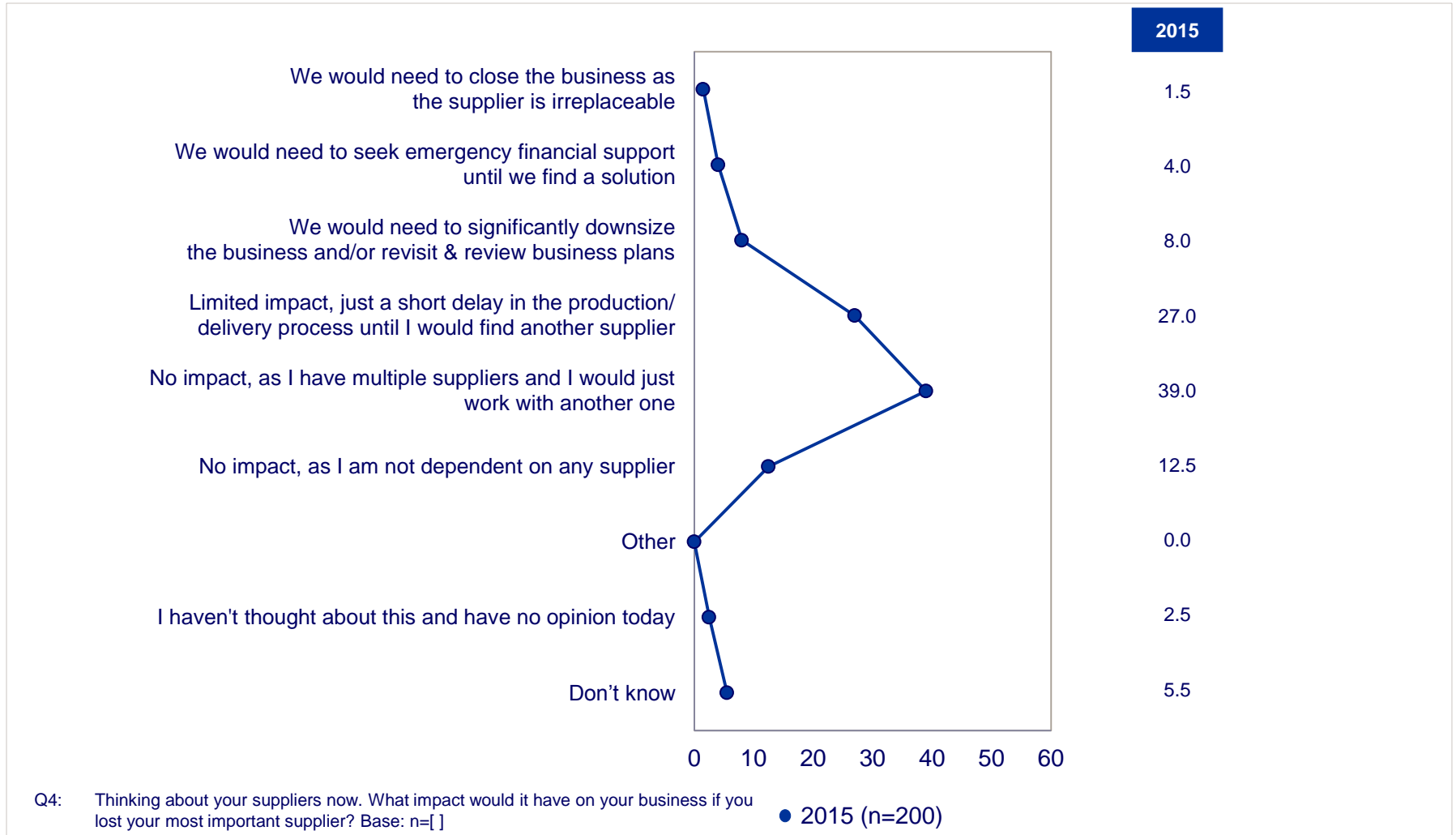
For one in two SMEs in Ireland, the loss of the most important supplier would have no influence on their day-to-day business

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



Ireland



SMEs in Italy have little worry about losing their main suppliers

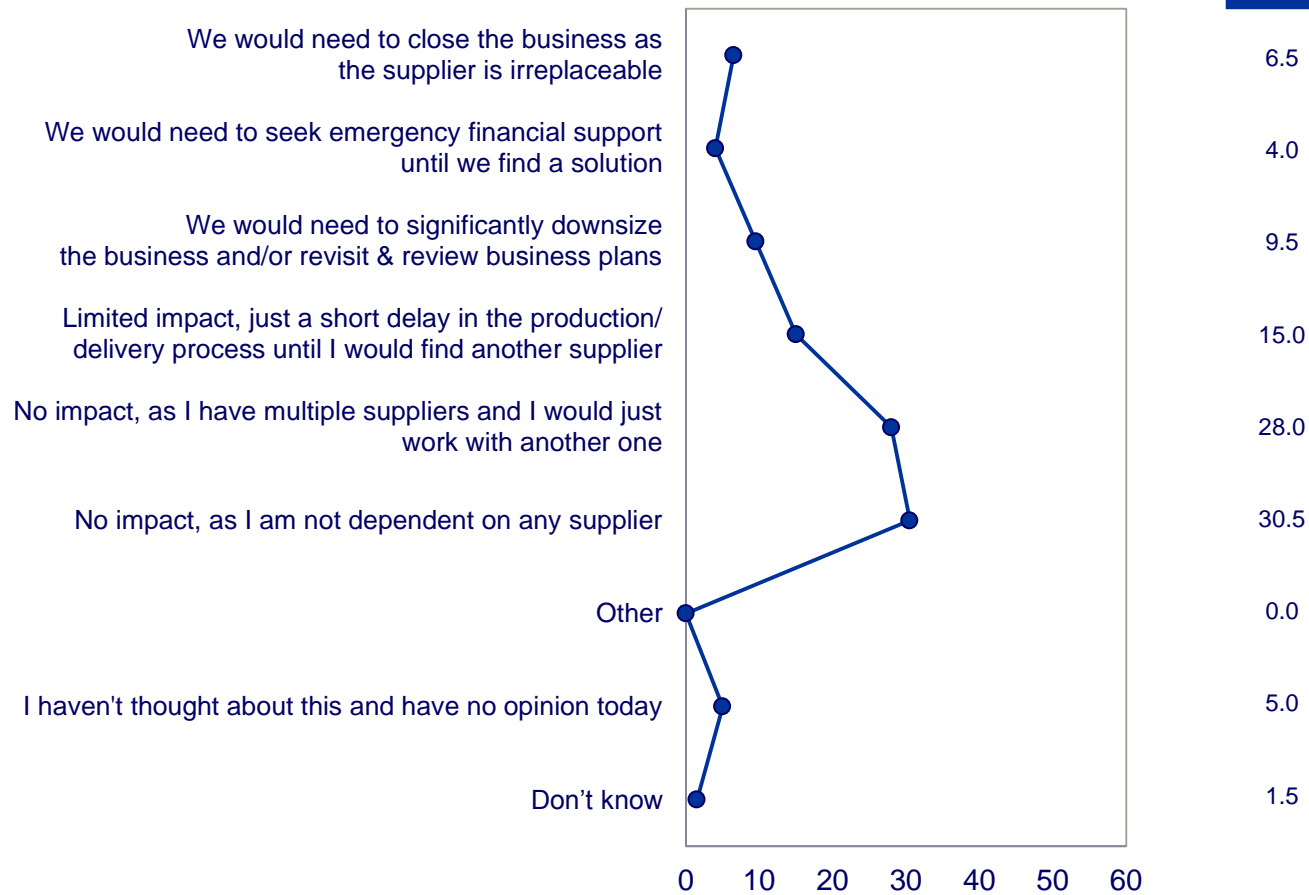
Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



Italy

2015



Q4: Thinking about your suppliers now. What impact would it have on your business if you lost your most important supplier? Base: n=[] ● 2015 (n=200)

SMEs in Portugal have little worry about losing their main suppliers

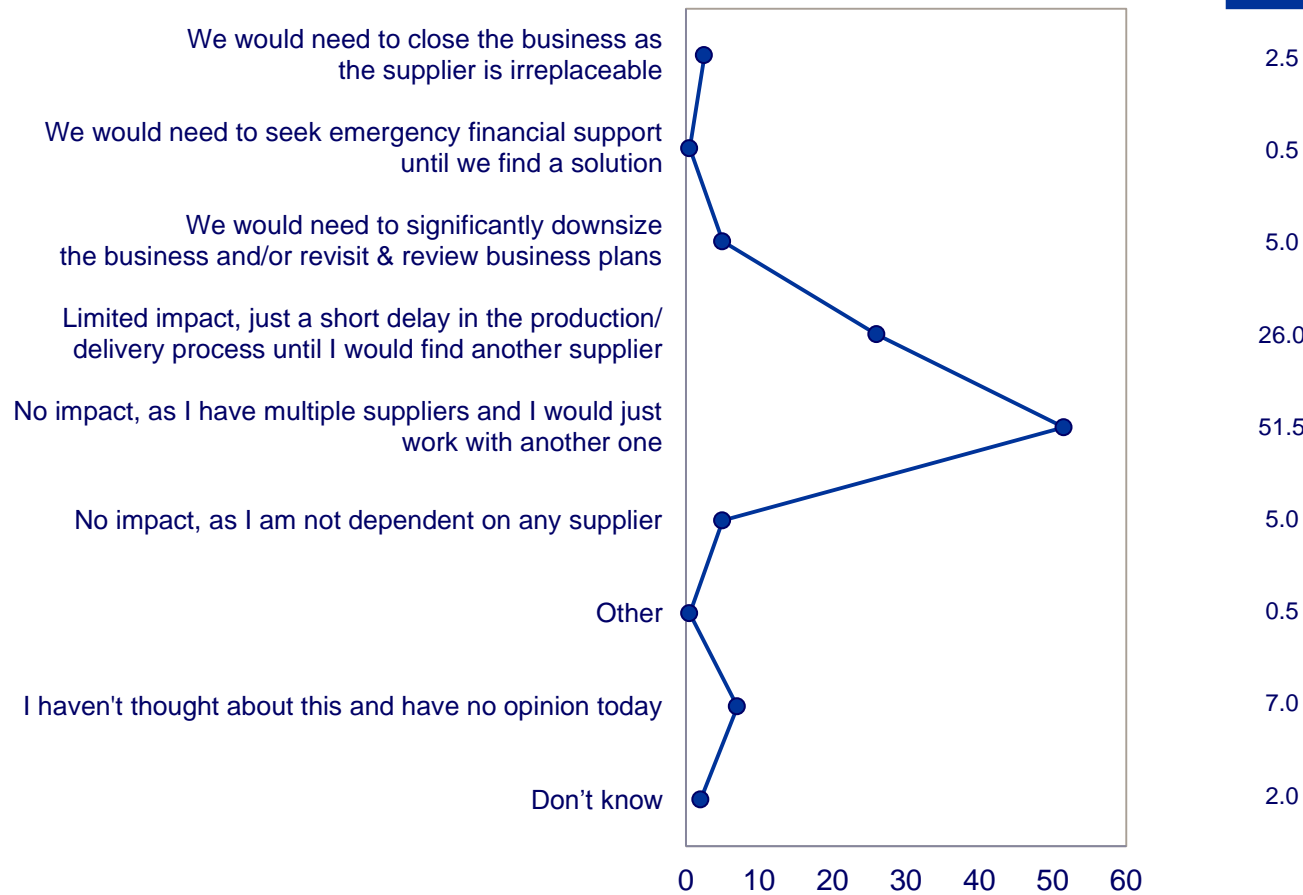
Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



Portugal

2015



Q4: Thinking about your suppliers now. What impact would it have on your business if you lost your most important supplier? Base: n=[] ● 2015 (n=200)

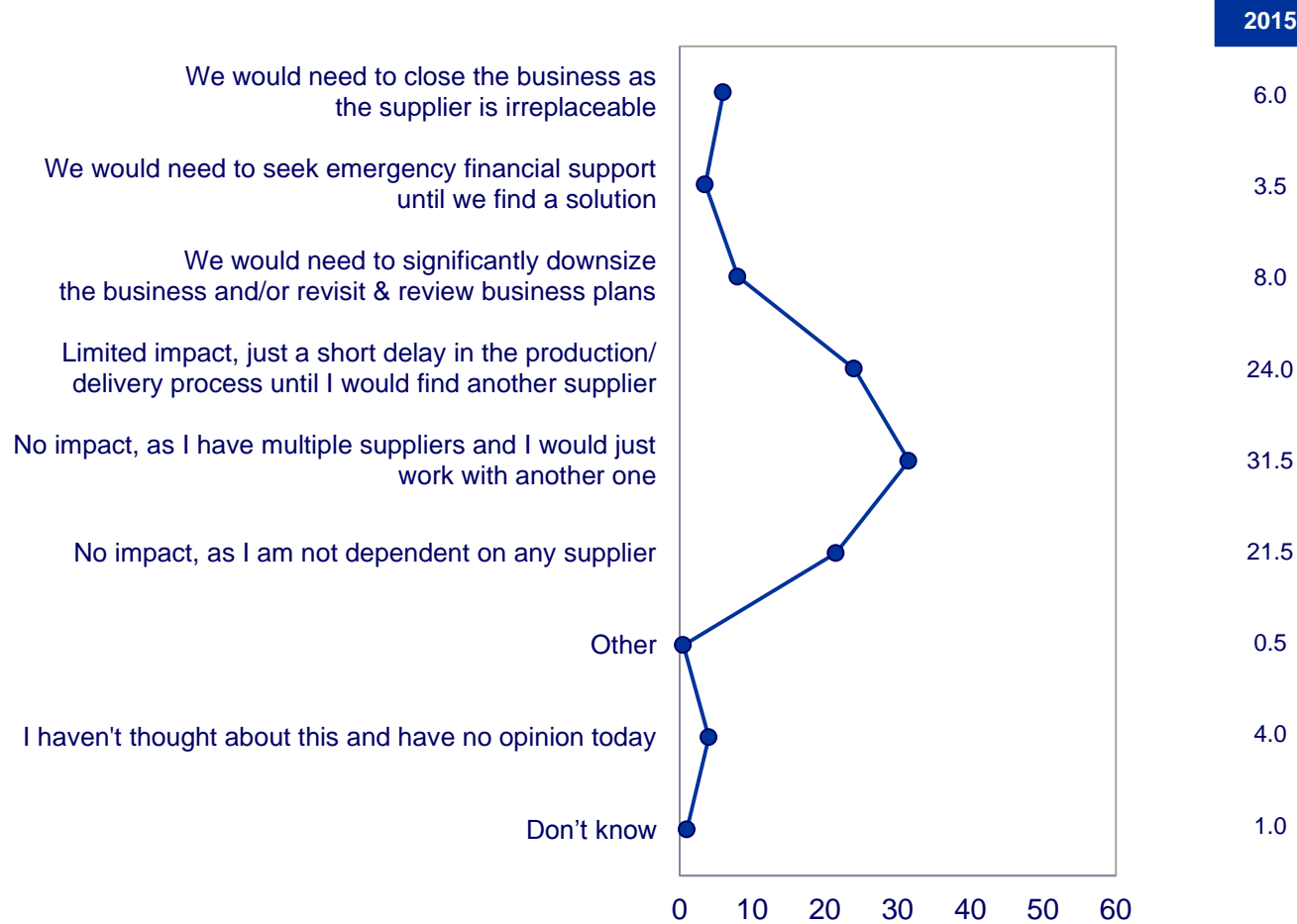
For one in four of the SMEs in Spain, the loss of the main supplier would have a limited impact on their business

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



Spain



Q4: Thinking about your suppliers now. What impact would it have on your business if you lost your most important supplier? Base: n=[]

● 2015 (n=200)

The loss of a supplier would have little influence on day-to-day business for SMEs in Brazil

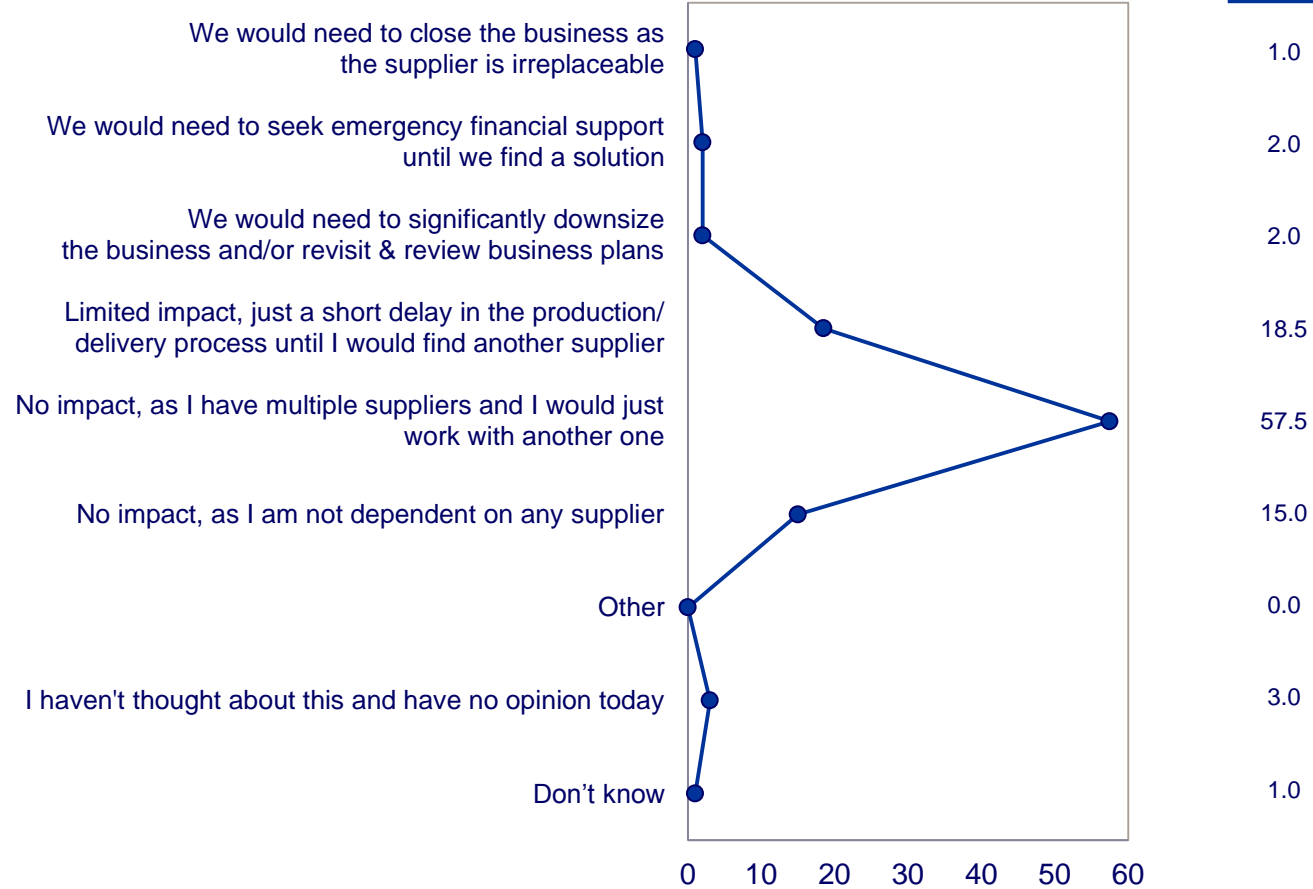
Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



Brazil

2015



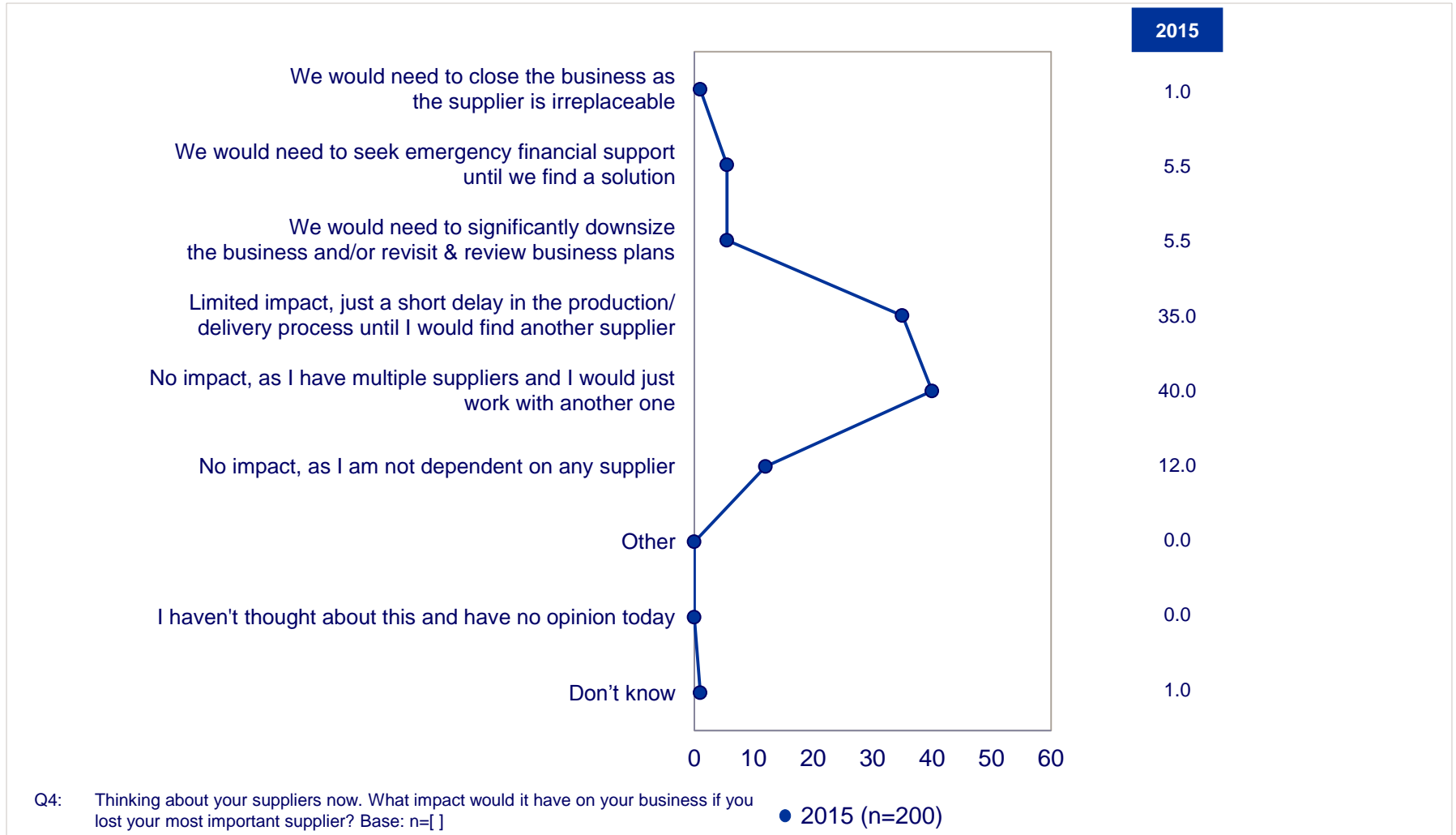
Q4: Thinking about your suppliers now. What impact would it have on your business if you lost your most important supplier? Base: n=[]

● 2015 (n=200)

For about one in two SMEs in Italy, the loss of the most important supplier would have no effect on their own business

Potential business impact of 'loss of the main supplier' for SMEs in 2015

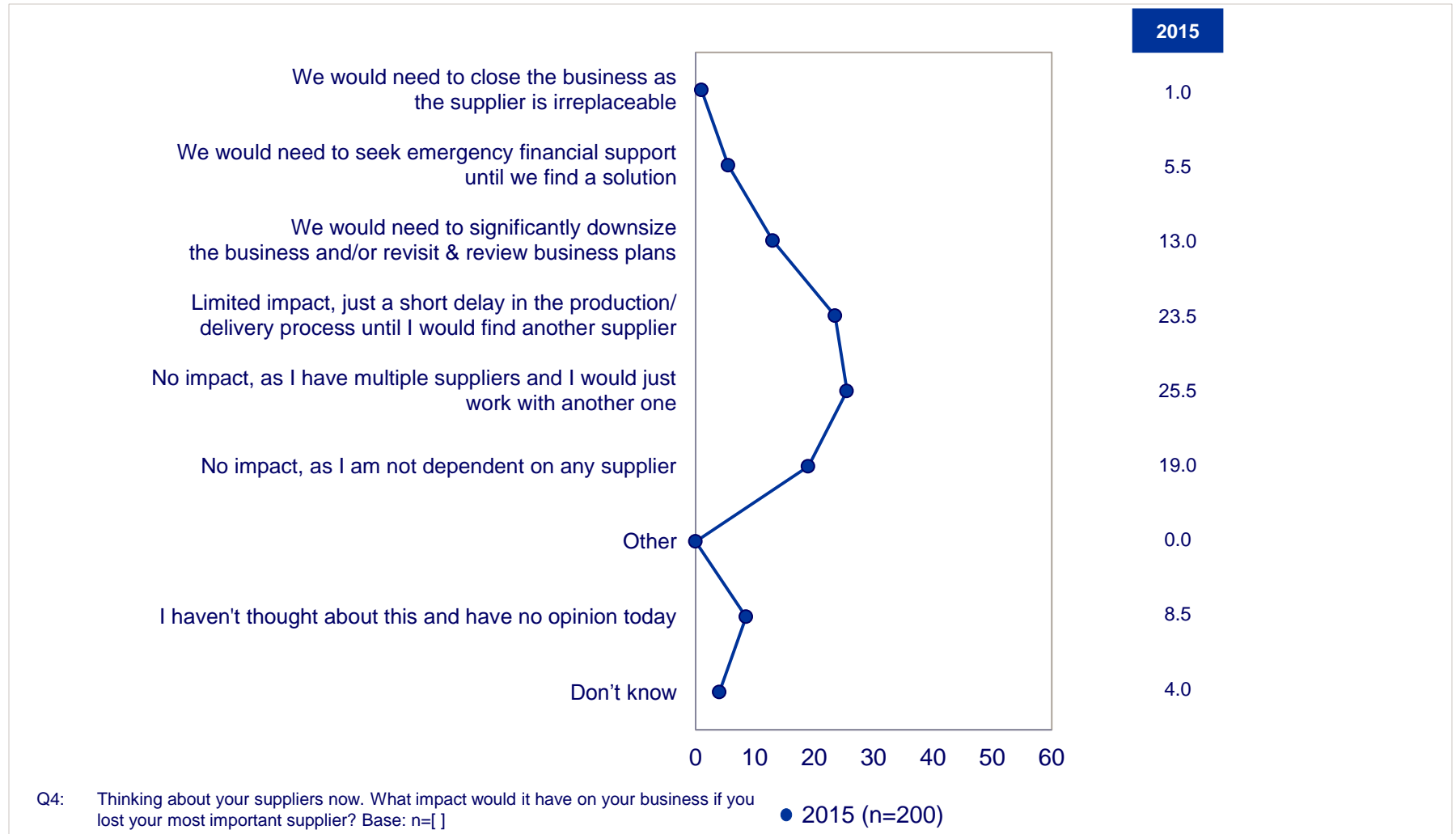
Statistics in %



Almost half of the USA SMEs do not believe that the loss of a main supplier would have any influence on their own business

Potential business impact of 'loss of the main supplier' for SMEs in 2015

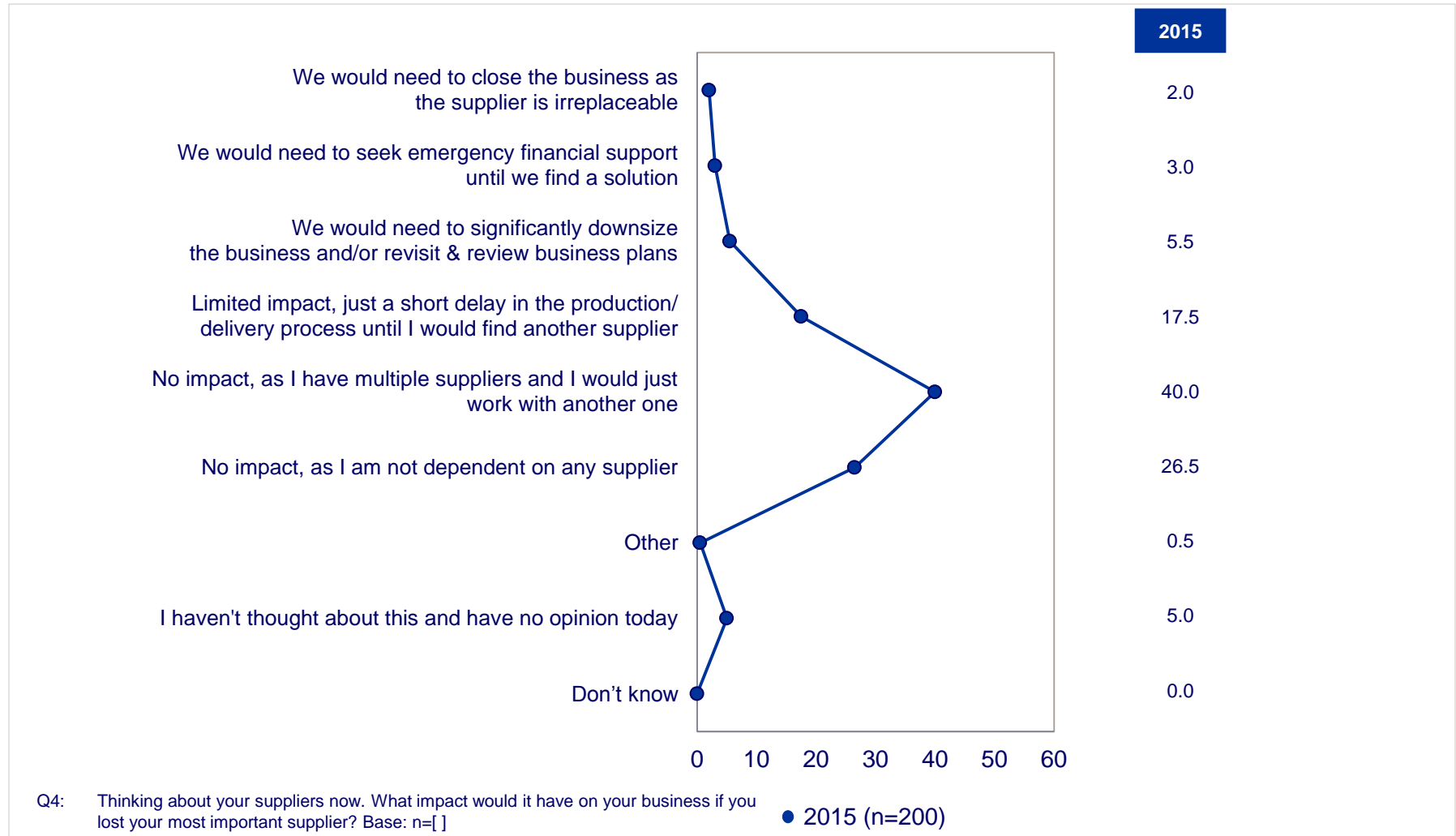
Statistics in %



The loss of a main supplier would have little effect on day-to-day business for Morocco SMEs

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



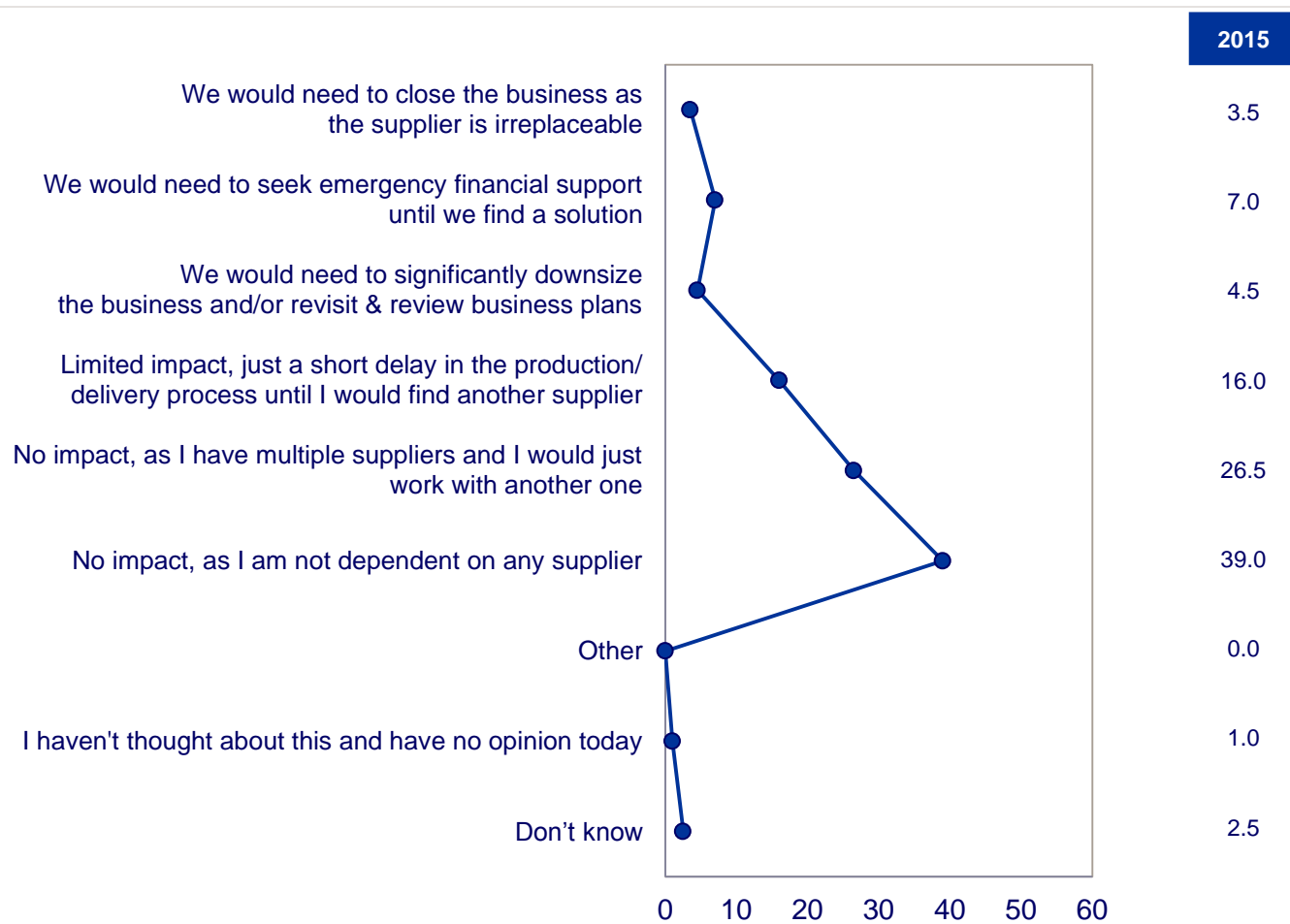
SMEs in Turkey have little worry about losing their main suppliers

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



Turkey



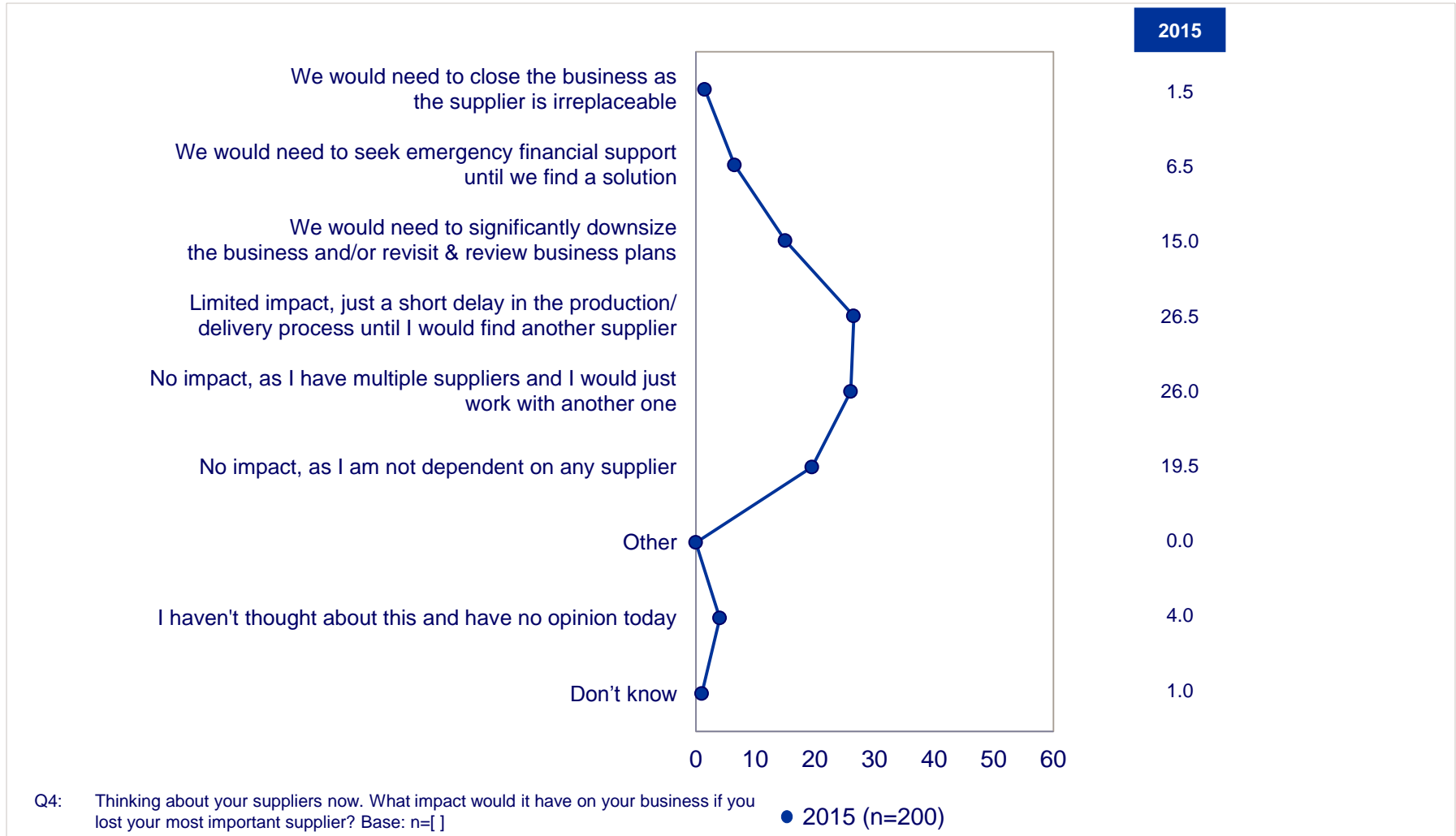
Q4: Thinking about your suppliers now. What impact would it have on your business if you lost your most important supplier? Base: n=[]

● 2015 (n=200)

Little effect on day-to-day business is expected due to the loss of a supplier for UAE SMEs

Potential business impact of 'loss of the main supplier' for SMEs in 2015

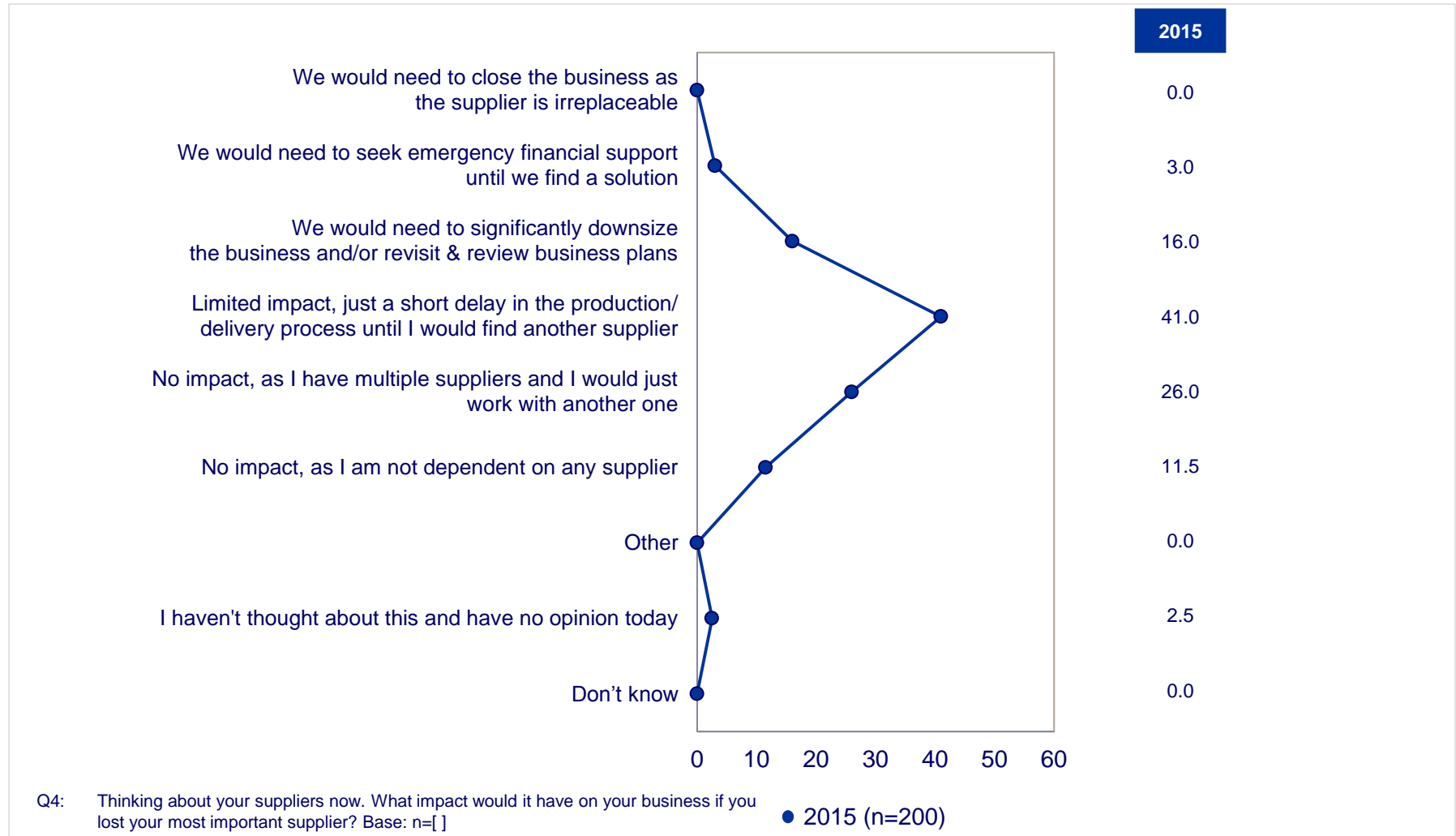
Statistics in %



The loss of a main supplier would have a limited impact on day-to-day business for Hong Kong SMEs

Potential business impact of 'loss of the main supplier' for SMEs in 2015

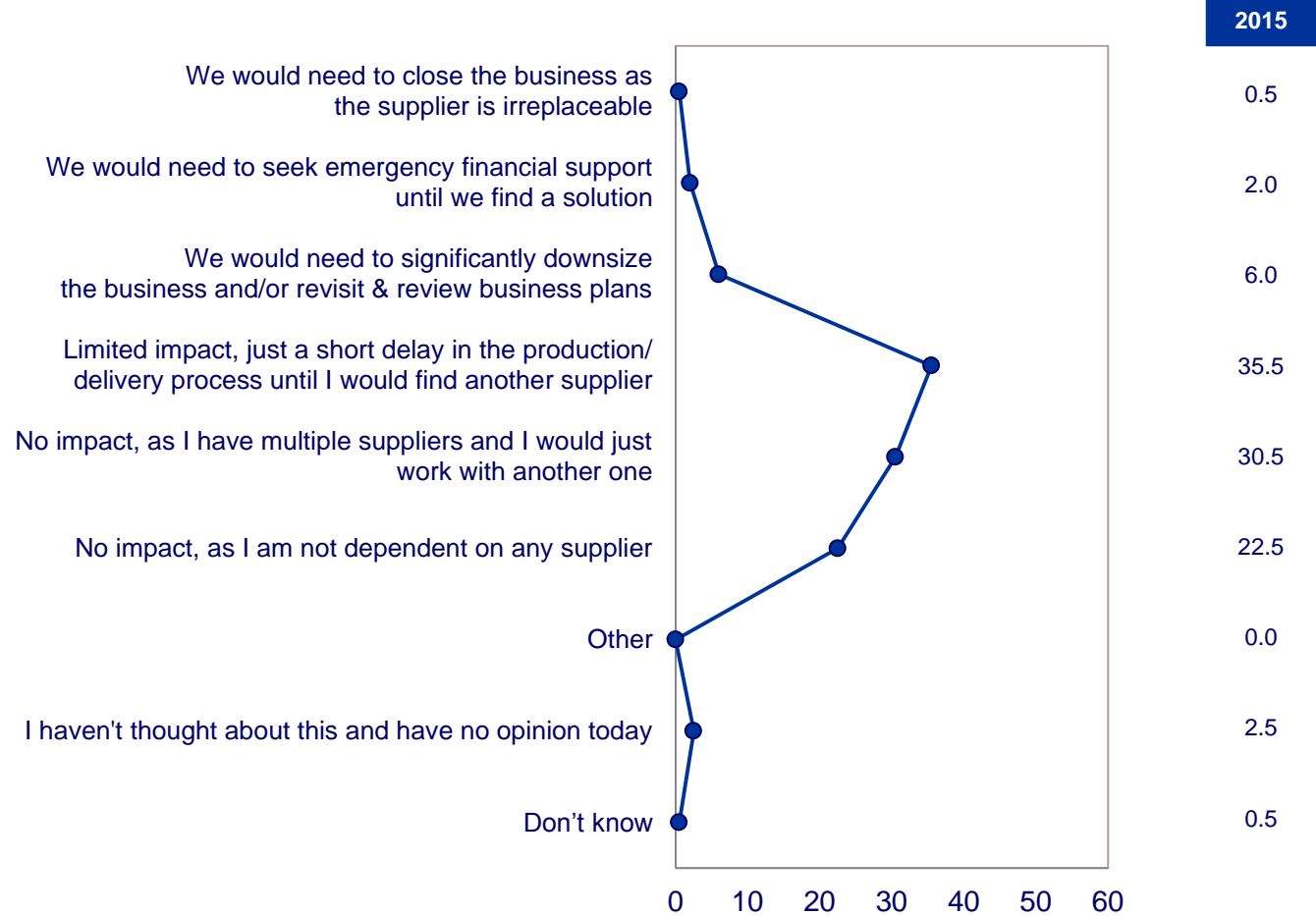
Statistics in %



The loss of a supplier would have a limited impact on day-to-day business for SMEs in Malaysia

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Statistics in %



Q4: Thinking about your suppliers now. What impact would it have on your business if you lost your most important supplier? Base: n=[] ● 2015 (n=200)

Appendix: Sample structure

Potential business impact of 'loss of the main supplier' for small and medium enterprises (SMEs) in 2015



Sample structure

Function and full-time employees

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Distribution in % (n=200 per country)







	Europe							Latin America	
									
	CH	Austria	Germany	Ireland	Italy	Portugal	Spain	Brazil	Mexico
Function									
CEO/Owner	45.0	64.5	60.5	41.5	67.0	47.0	42.0	40.5	44.0
CFO/Treasurer	22.5	13.5	15.0	15.5	15.5	12.0	21.0	21.0	15.0
COO/Head of operations	18.5	17.5	15.5	16.0	15.5	14.5	20.0	15.5	27.0
General Manager	14.0	4.5	9.0	27.0	2.0	26.5	17.0	23.0	14.0
Full-time employees									
0 employees	2.5	3.0	1.5	0.5	3.0	0.0	5.0	0.0	0.0
1 to 9 employees	47.5	57.0	28.5	34.5	50.0	50.0	45.0	35.5	31.0
10 to 19 employees	24.0	21.5	29.0	26.0	23.0	19.5	23.5	33.5	20.0
20 to 49 employees	7.5	4.0	11.0	9.0	8.5	11.0	7.0	7.5	10.0
50 to 99 employees	13.5	10.0	23.0	21.5	12.5	13.0	15.0	20.0	27.5
100 to 250 employees	5.0	4.5	7.0	8.5	3.0	6.5	4.5	3.5	11.5

Sample structure

Function and full-time employees

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Distribution in % (n=200 per country)










	North America	Middle East & Africa			APAC	
						
	USA (new 2015)	Morocco	Turkey	UAE	Hong Kong	Malaysia
Function						
CEO/Owner	38.5	59.0	50.0	41.5	46.5	29.5
CFO/Treasurer	10.0	11.5	11.5	14.0	15.5	20.0
COO/Head of operations	9.5	13.0	24.0	15.5	17.5	22.0
General Manager	42.0	16.5	14.5	29.0	20.5	28.5
Full-time employees						
0 employees	2.5	0.0	1.0	0.5	2.0	0.0
1 to 9 employees	33.5	67.5	58.5	48.0	33.5	50.0
10 to 19 employees	26.5	17.5	21.5	24.0	27.5	22.5
20 to 49 employees	12.5	4.0	9.0	7.5	12.0	7.5
50 to 99 employees	11.5	8.5	6.0	11.5	15.5	15.5
100 to 250 employees	13.5	2.5	4.0	8.5	9.5	4.5

Sample structure

Revenue and industry

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Distribution in % (n=200 per country)

	Europe							Latin America	
									
	CH	Austria	Germany	Ireland	Italy	Portugal	Spain	Brazil	Mexico
Revenue									
Up to 2 Million EUR	32.0	57.5	41.0	41.0	48.0	37.0	47.5	28.0	32.5
More than 2 to 5 Million EUR	17.0	12.5	20.0	16.5	13.5	13.5	17.5	21.0	15.5
More than 5 to 10 Million EUR	13.0	7.0	9.5	11.0	9.0	10.0	5.0	7.0	9.0
More than 10 to 50 Million EUR	3.0	4.0	4.5	4.5	3.5	4.0	0.5	0.0	7.5
More than 50 Million EUR	0.5	1.0	2.0	1.5	0.5	0.5	0.0	0.0	0.5
Industry									
Agriculture	2.5	1.5	5.5	4.5	4.5	4.5	9.5	10.5	7.0
Manufacturing and construction	9.5	8.5	13.5	11.5	7.0	8.5	10.5	7.0	12.0
Wholesale and retail trade	15.0	13.0	14.5	12.5	8.0	9.0	11.0	18.5	17.0
Information and communication	7.0	9.0	8.5	6.5	5.0	3.0	4.0	7.0	4.0
Financial activities (including insurance)	4.0	9.5	13.0	8.0	13.5	6.0	4.0	2.5	3.5
Administrative and support service	6.0	6.0	3.5	4.5	2.5	3.0	4.0	2.0	4.0
Public administration	5.5	4.5	3.5	2.0	3.5	1.0	4.0	2.0	2.5
Transport and storage	7.5	4.5	5.0	7.0	3.0	14.5	5.0	10.0	5.0
Accommodation and food service	9.5	26.5	9.5	18.5	24.0	17.5	12.0	16.0	24.5
Consumer services	22.5	8.5	7.0	15.5	15.0	8.0	24.0	12.0	16.5
Other service activities	11.0	8.5	16.5	9.5	14.0	25.0	12.0	12.5	4.0

Sample structure

Revenue and industry

Potential business impact of 'loss of the main supplier' for SMEs in 2015

Distribution in % (n=200 per country)

	North America	Middle East & Africa			APAC	
						
	USA (<i>new 2015</i>)	Morocco	Turkey	UAE	Hong Kong	Malaysia
Revenue						
Up to 2 Million EUR	29.0	46.5	54.5	40.5	32.5	33.5
More than 2 to 5 Million EUR	11.0	9.5	5.5	15.5	25.5	22.0
More than 5 to 10 Million EUR	6.0	11.5	7.5	7.0	6.5	7.0
More than 10 to 50 Million EUR	7.5	2.0	2.0	6.0	2.5	2.0
More than 50 Million EUR	1.5	0.5	1.0	0.0	2.0	0.5
Industry						
Agriculture	3.0	1.0	3.5	2.5	0.0	2.5
Manufacturing and construction	18.0	18.0	10.5	4.0	10.5	6.0
Wholesale and retail trade	20.5	14.5	13.5	16.0	6.0	17.0
Information and communication	8.0	21.5	15.5	5.0	3.0	2.0
Financial activities (including insurance)	12.5	8.5	7.5	8.5	21.5	12.0
Administrative and support service	2.0	4.0	2.5	5.5	8.0	5.0
Public administration	2.0	2.5	2.0	2.5	10.5	4.5
Transport and storage	9.5	13.0	17.5	13.0	7.5	11.0
Accommodation and food service	10.5	8.5	21.0	27.0	9.5	21.0
Consumer services	5.0	5.0	3.0	12.0	1.5	7.0
Other service activities	9.0	3.5	3.5	4.0	22.0	12.0