



2degrees Shaping Business Study 2024

FIGHTING
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FOR KIWI BUSINESS



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Methodology

- Acumen, on behalf of 2degrees, commissioned Perceptive* to undertake an annual study of the Shaping Business Research. The 2degrees study is now in its fifth year.
- Fieldwork commenced from the 3rd – 16th April 2024.
- We captured a total of n=704 employing decision makers, ranging from businesses with 1 employee to over 51 employees.
- The audience we spoke to are business decision makers, including Owners, CEOs, Directors, General Managers and C Suite Roles.
- The results will be viewed at a total level, and where applicable, will be shown in comparison to 2023, 2022 and 2021 results.
- Statistically significant skews across business size splits, including small businesses (1-20 employees), medium businesses (21-50 employees) and larger businesses (51+ employees) will be called out, along with other industry and regional skews.



Results weighted to be naturally representative of the **New Zealand employing business landscape**

- 1-20 employees: 65%
- 21-50 employees: 32%
- 51+ employees: 3%

Highlights

Have we entered the hybrid hangover?

- 28% of hybrid businesses found it made them less productive compared to in person, this has grown significantly from 2023 (17%).
- However, the preference of employees to have a mix of WFH still means businesses are having to decrease the amount of time staff are spending in the office (39%).

Two primary challenges when it comes to boosting productivity – technology and people

- Skilled labour continues to be a disruptive force for New Zealand businesses, despite increased migration. Most businesses still see their inability to attract skilled labour as a huge challenge and a barrier to improving productivity.
- Businesses now see offering employee benefits (WFH, training, salaries) as of lesser importance to attracting skilled talent. International migration is seen to play a key role for many businesses.
- Technology, automation and AI have significantly increased in perceived importance for New Zealand businesses and are now seen as an enabler of productivity alongside skilled labour.



Highlights

- Despite a challenging macro environment, business sentiment has continued to recover from the post covid lows; business mindset is still 'fragile'.
- The cost of doing business and a lack of access to affordable capital are key drivers to reduced business confidence and optimism. Supply chain issues are declining.
 - However, cost concerns appear to slowly declining since the peak in 2022.
- Are businesses becoming complacent about cyber-security? Or are they better prepared? Concerns about breaches have steadily decreased since 2022.





01

How are Kiwi businesses doing?

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Summary

HOW ARE KIWI BUSINESSES DOING?

How are businesses feeling?

- With COVID now behind us, we are seeing a significant decline in 'Surviving' businesses – with more businesses shifting into 'Thriving' and 'Starting' phases.
- Although business status is significantly more likely to be the same as last year, sentiment is still mixed. While the overall number of pessimistic reasons have gone down, inflationary costs and reduced consumer spending continue to create a challenging business environment this year.

Business challenges

- To navigate the balance between managing rising expenses and remaining profitable, over half of business decision makers have increased their prices over the past year – and when looking forward, under half still plan to do so.
- Larger businesses (51+ employees) have been hit the hardest when it comes to rising costs, stating they would be significantly more likely to increase prices, along with service-based industries.



Summary

HOW ARE KIWI BUSINESSES DOING?

What will help businesses?

- While cashflow continues to be a key driver for growth, funding and capital are also top of mind for businesses in order to help them thrive and reach their business goals.
- With tax being top of mind as the most unfair thing about being in business, coupled with inflation and decreases in customer spending, business decision makers continue to seek government support through tax breaks and addressing inflationary policy – much the same as 2023.



1.1

How are Kiwi businesses feeling?

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Surviving, reviving, thriving, or starting?

This year, business life stage appears consistent with 2023, with the slightest shift from reviving to thriving.

- This year, larger businesses (+ employees) are more likely to be starting (14%).
- As New Zealand progresses in recovering from the impacts of COVID-19, we see that the Education & Training sector – who have been heavily impacted by school closures, strikes and changes to education policies – are more likely to be reviving among industry groups.

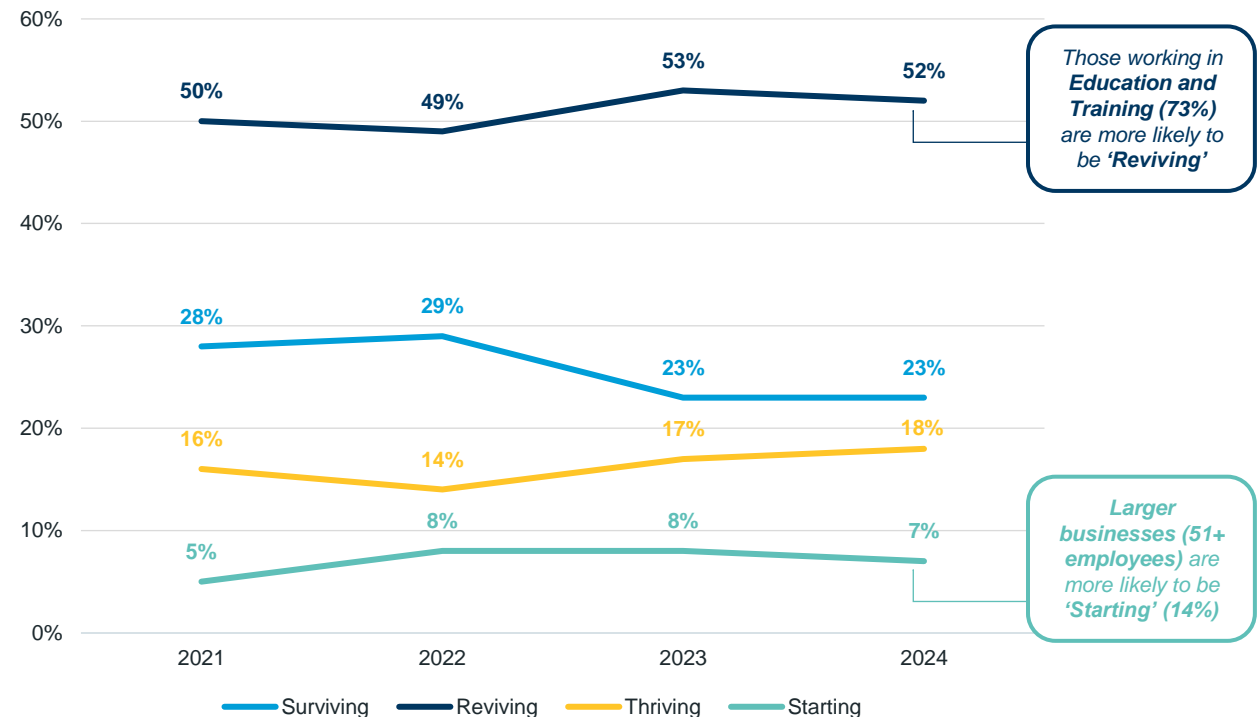
Surviving – We are just getting by, it's challenging and quite stressful, I worry about the viability of my business long term

Reviving – We have had our challenges, but we are slowly getting things back on track

Thriving – We are stronger than we have ever been, and business is doing well

Starting – We have new opportunities that have enabled us to start a new business or adapt an existing business

Q: What best describes your business at the moment?



Base: Total Employing Business decision makers, 2024 (n=704) 2023 (n=701), 2022 (n=702), 2021 (n=1,003)

↓↑ Represents a significant increase/decrease based on a 95% CI compared to 2023

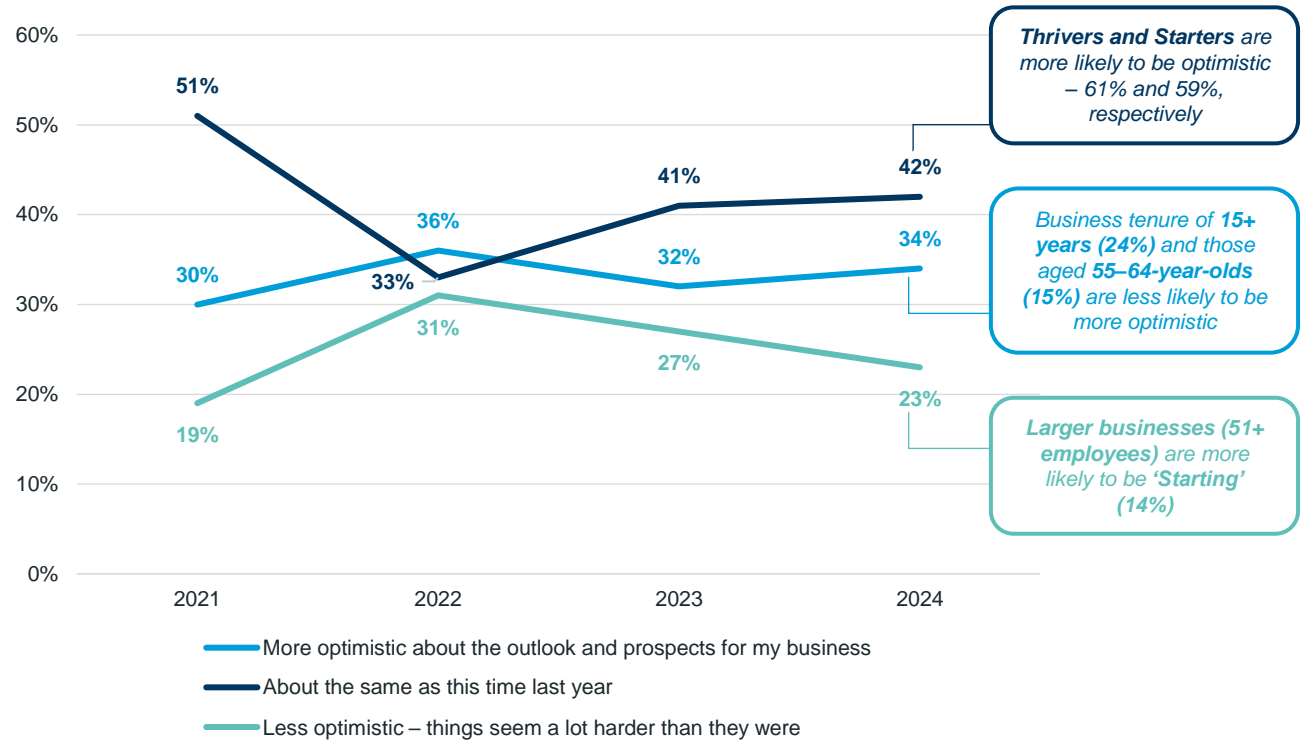
Business status

Optimism is better than last year, with decreases in those being 'less optimistic' and a slight rise in those being 'more optimistic'.

This year, we see a significant increase in business tenure, specifically 15+ years being far less likely to be optimistic.

- Directionally, optimism grows as business size does.
- Thriving and starting businesses are more likely to be optimistic (61% and 59%, respectively). A further increase on 2023 results.

Q: How are you feeling about the status of your business compared to last year?

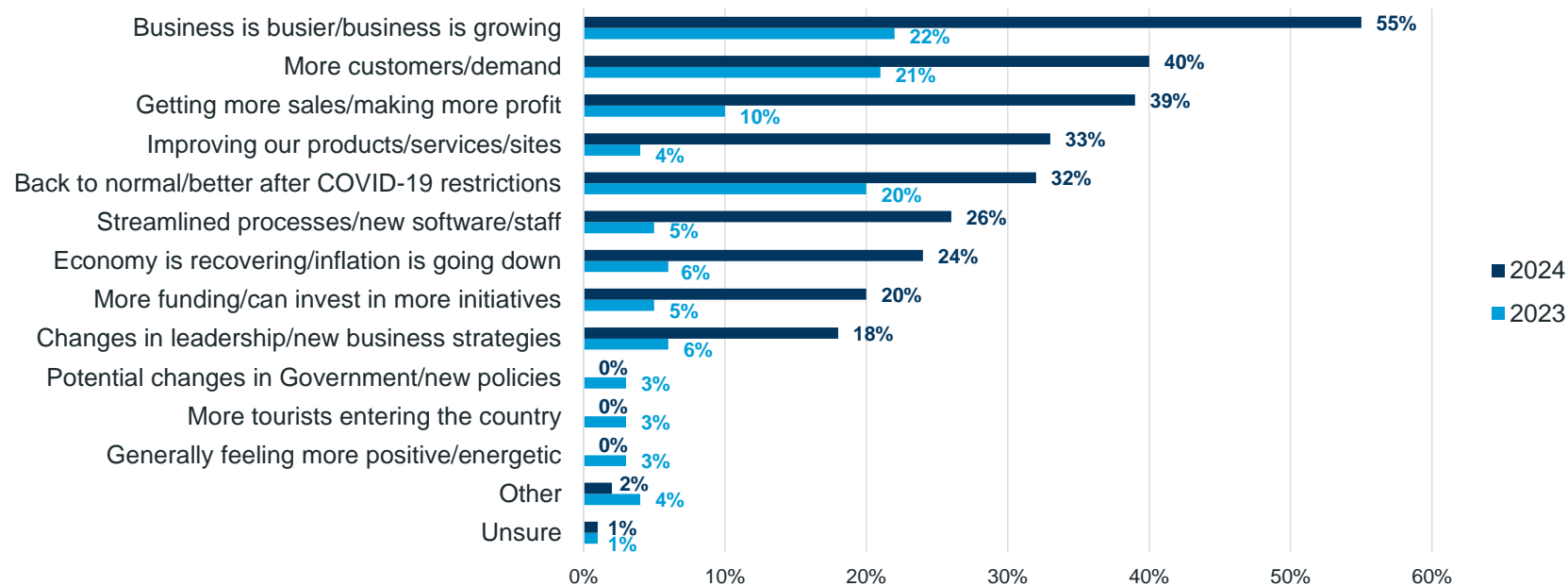


Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701), 2022 (n=702), 2021 (n=1,003)

Feeling more optimistic

- The core drivers of optimism revolve around a growth in business, with more customers, sales and profit also being a key driver

Q: Why are you feeling more optimistic about the status of your business compared to last year (2023)? (select all that apply)



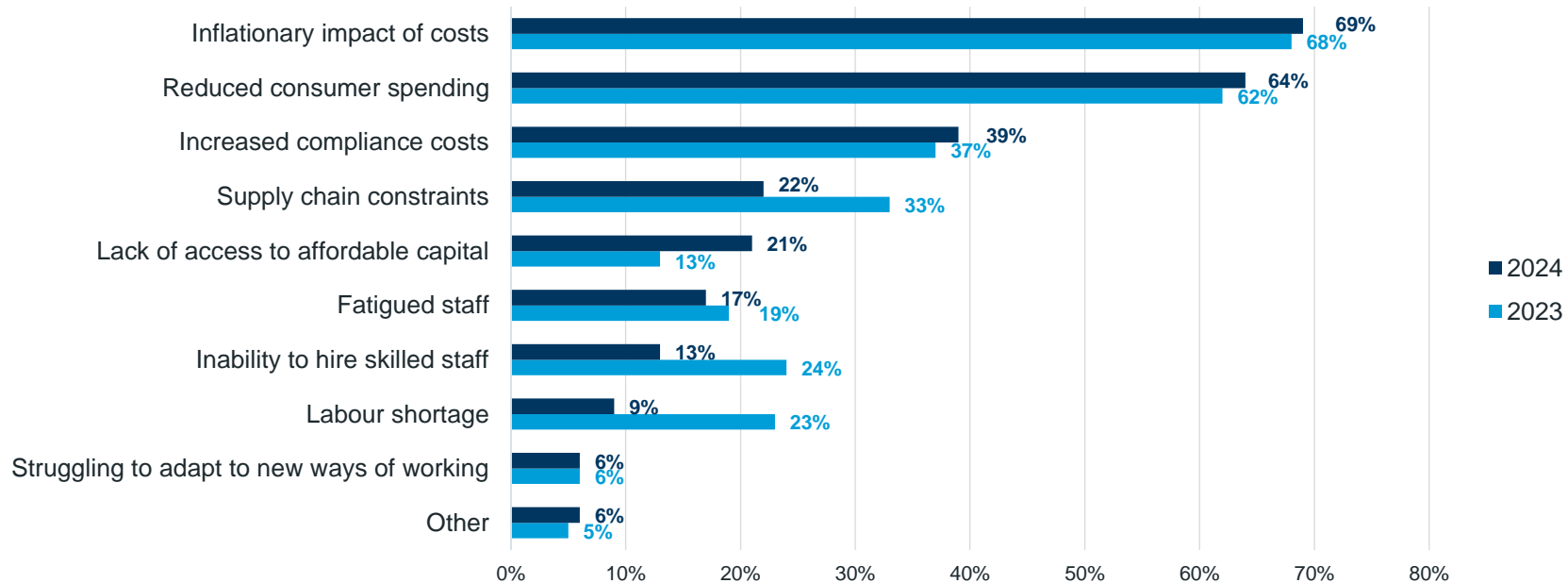
Base: Among businesses who feel more optimistic about the status of their business, 2023 (n=222), 2024 (n=241)

*Note this question was 'multiselect' in 2024, which has resulted in much higher results. Please refer to the proportions only when comparing with 2023 results.

Feeling less optimistic

- On the other hand, among those feeling less optimistic, inflationary impact of costs and reduced customer spending continue to be the biggest pain points (as seen in previous years). The inability to hire skilled staff and labour shortage are less of a concern this year compared with 2023.

Q: Why are you feeling less optimistic about the status of your business compared to last year?



2024 – Selected 3.1 statements and
2023 – Selected 2.9 on average

Base: Among businesses who feel less optimistic about the status of their business, 2024 (n=165) 2023 (n=190)

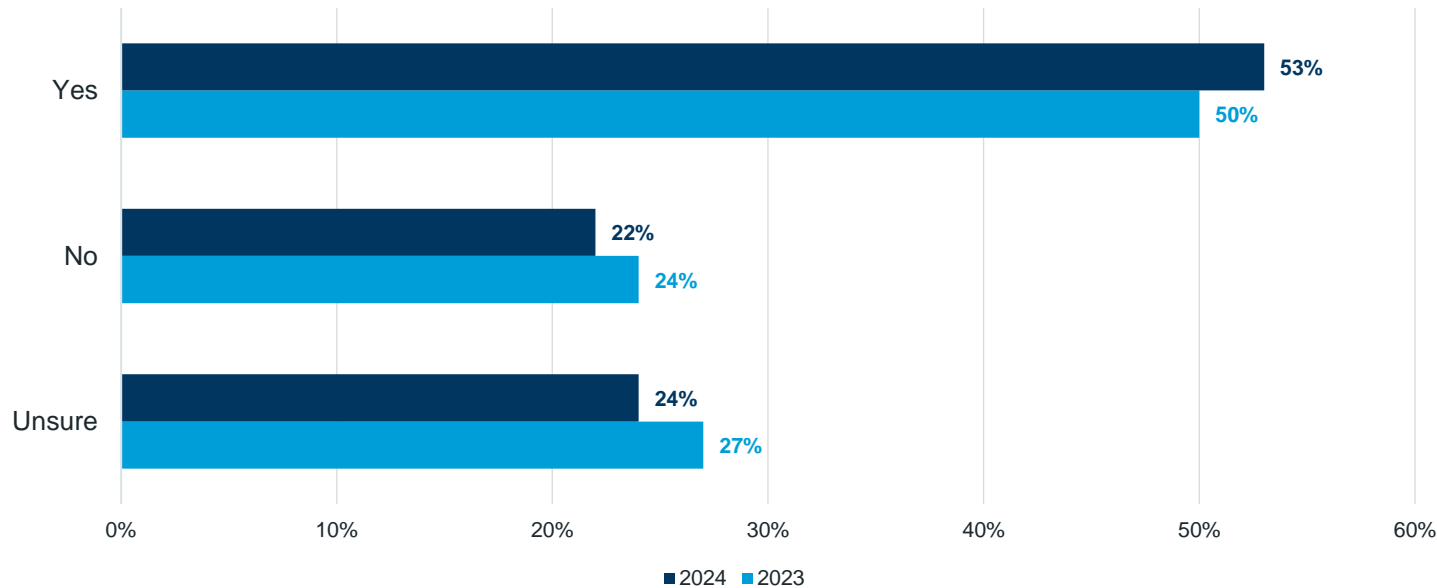
↓↑ Represents a significant increase/decrease based on a 95% CI compared to 2023

Anticipation of revenue growth

Over half of employing businesses anticipate a growth in revenue in the coming year – more optimistic than last year’s predictions. However, this appears to have shifted from ‘unsure’ to a ‘yes’, rather than from ‘no’.

- Notably, those longer in business, of older age groups, and those in surviving businesses are much more likely to disagree.

Q: Do you anticipate your business will grow in terms of revenue in the next year?



Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701), 2022 (n=702), 2021 (n=1,003)

Those significantly more likely to say ‘Yes’:

‘Thriving’ businesses (78%)

Those significantly more likely to say ‘No’:

Businesses with tenure of 15+ years (31%)

Older age groups (55-64 years) (41%)

Wellington-Wairarapa residents (39%)

Construction workers (38%)

‘Surviving’ businesses (45%)

1.2

Business challenges

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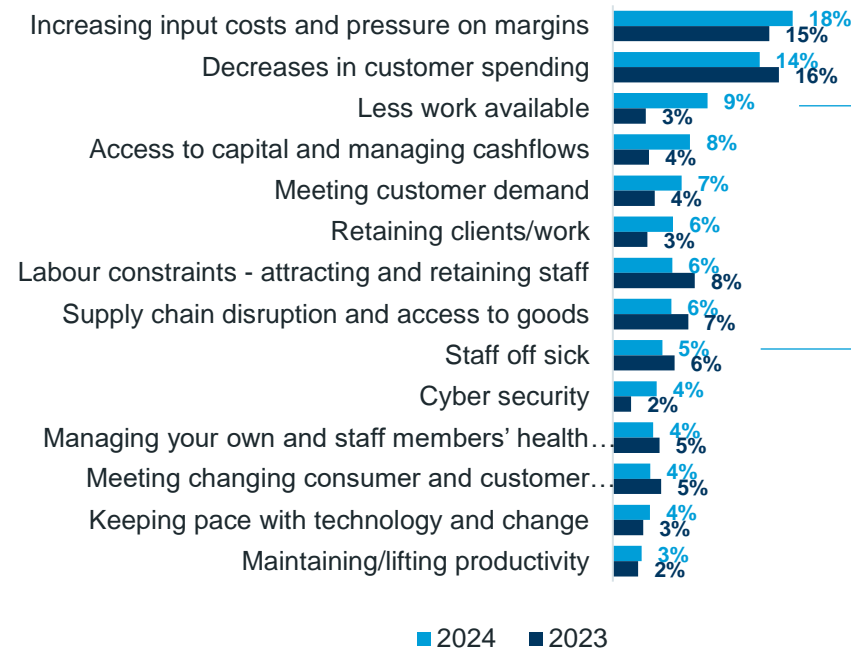


Biggest business challenges

There are a range of challenges currently faced by New Zealand businesses:

- Increasing input costs and pressures on margins is the primary challenge for most businesses (as seen in 2023).
- Decreases in customer spending is also a challenge – and is significantly more likely to be impacting the retail trade (34%).
- Notably, ‘less work available’ is more significant for businesses in a rural location (20%), in the Construction industry (21%) and for ‘surviving’ businesses (20%).
- We see decreases in labour constraints and supply chain disruptions this year, indicating that access to both people and goods from overseas has improved.

Q: What would you say is the biggest business challenge your business is currently facing? (select one)



Retail Trade are significantly more likely to reference 'Decreases in customer spending' (34%)

Rural location (20%), Construction (21%), 'Surviving' businesses (20%) are significantly more likely to reference 'less work available'

Education & Training are significantly more likely to reference 'staff off sick' (20%)

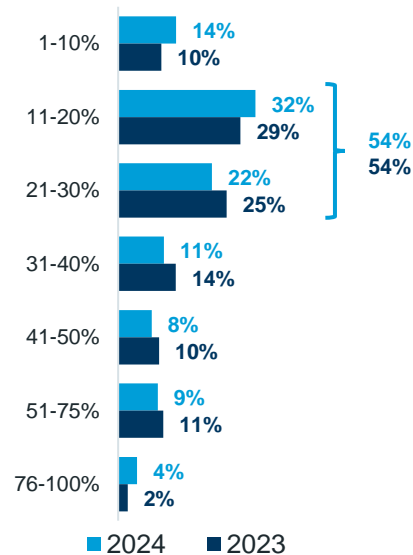
Base: Total Employing Business decision makers, 2023 (n=701), 2024 (n=704)

↓↑ Represents a significant increase/decrease based on a 95% CI compared to 2023

Increased running costs

- Majority of business decision makers claim their running costs have increased in the past 12 months – however, this has decreased in the past couple of years.
- For most businesses running costs have increased between 11-30% this year, remaining consistent with 2023 results.
- The largest cost increases are coming from labour costs and utilities/insurance/leases.

Q: By how much have your running costs increased in the past 12 months?



In 2024, 80% of business decision makers claim running costs have increased in the past 12 months

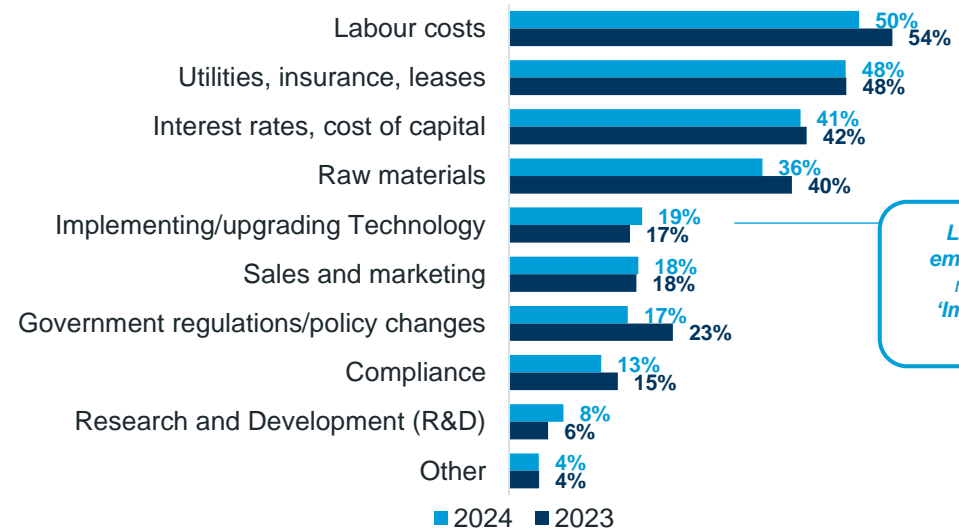
Versus 87% in 2023

Versus 90% in 2022

Versus 53% in 2021

Base: Among businesses whose running costs have increased, 2023 (n=613), 2024 (n=560)

Q: Where have you biggest cost increases come from? (select all that apply)



Larger businesses (51+ employees) are significantly more likely to reference 'Implementing/Upgrading Tech' (34%)

Base: Among businesses whose running costs have increased, 2023 (n=613), 2024 (n=565)

↓ ↑ Represents a significant increase/decrease based on a 95% CI compared to 2023

Increased prices

- More than half of business decision makers claim they have increased their prices in the past 12 months – driven by larger businesses with 51+ employees (60%) and those working in the service industries (hospitality, tech, professional and technical services).
 - This has dropped almost 10 percentage points since last year, where prices were much more likely to be increased.
- Less than half intend to increase prices in the coming year – which has also decreased on the previous year’s forecasting.
 - Larger businesses (51+ employees) are more likely to claim they are planning to increase prices.
- Among businesses who plan to increase prices, more than 40% intend to do so by 1-10%.

Q: Have you increased your prices in the last 12 months?

In 2024, 53% of business decision makers claim they have **increased their prices** in the past 12 months (compared with 63% in 2023).

Q: Are you planning on increasing your prices in the next 12 months?

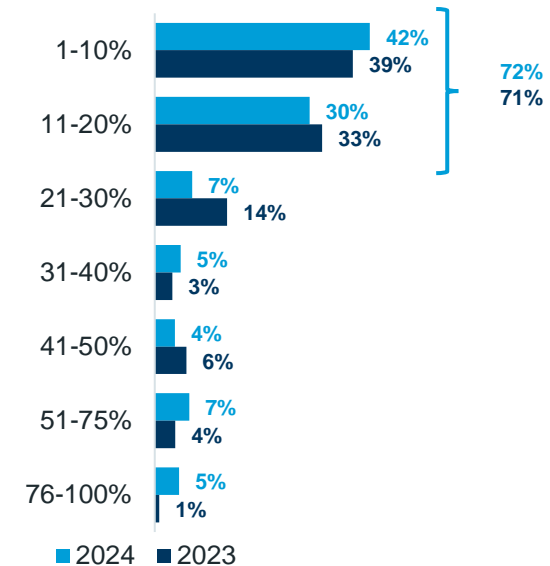
In 2024, 48% of business decision makers are **planning to increase their prices** in the next 12 months

Versus 54% in 2023

Versus 61% in 2022

Versus 36% in 2021

Q: By how much do you intend to increase your prices in the next 12 months?



Reducing costs

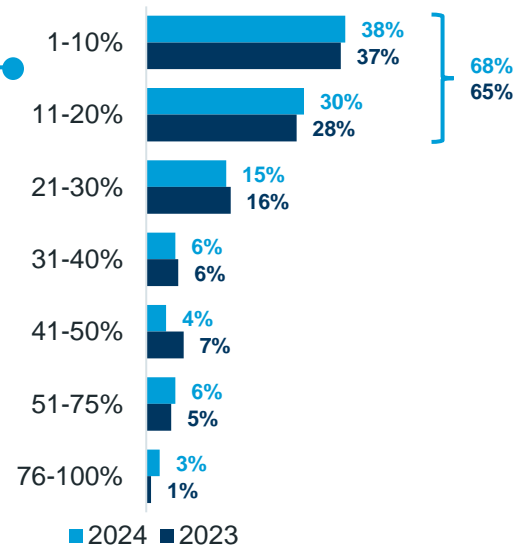
- This year, less than three-quarters of business decision makers claim they will look at ways to reduce costs in the next 12 months, decreasing from previous years.
 - Among those who intend to reduce costs, more than two-thirds plan to do so by 1-20%.
- When it comes to areas business decision makers intend to reduce costs across, moving to new suppliers is the primary area, followed by reducing staff and procurement.

In 2024, 72%
of business decision
makers claim they will **look
at ways to reduce costs**
in the coming year

Versus 77% in 2023

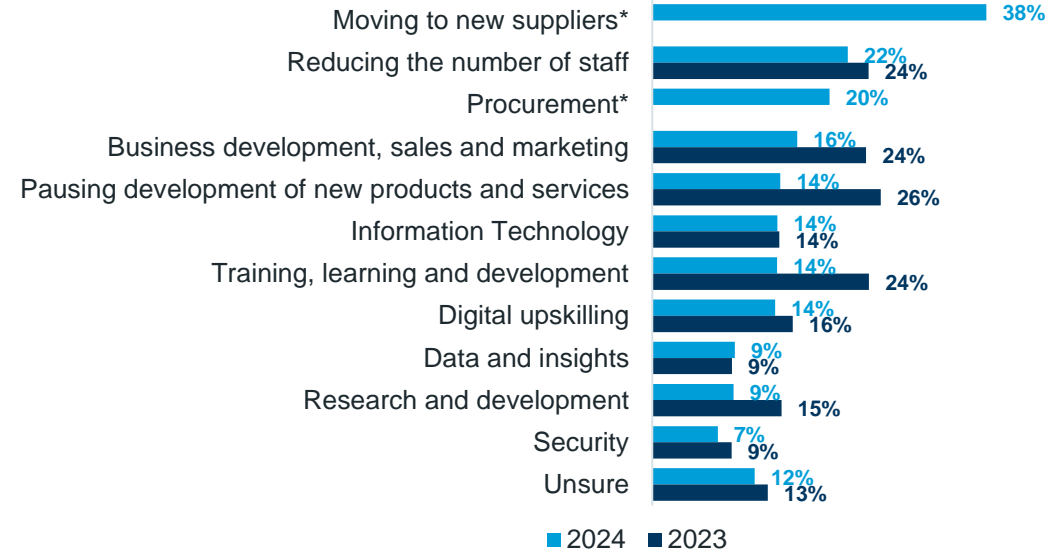
Versus 75% in 2022

Q: By how much do you intend to reduce costs in the next 12 months?



Base: Among businesses who intend to reduce costs, 2023 (n=544), 2024 (n=509)

Q: In which areas do you intend to reduce costs? (select all that apply)



Base: Among businesses who intend to reduce costs, 2023 (n=544), 2024 (n=504)
* New options added in 2024

↓ ↑ Represents a significant increase/decrease based on a 95% CI compared to 2023

1.3

Investment and new ventures

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Intention to invest

- Consistent with 2023, this year 2 out of 5 business decision makers claim they intend to increase investment in the next 12 months.
 - Med-larger (21+ employees), younger-tenured (less than 1 year), under 35s, and thriving businesses are significantly more likely to claim they plan to increase investment in the coming year (51%, 74%, 56%, and 54%, respectively).
- Among those with the intention to increase investment, almost half plan to do so by 1-20%, a shift on 2023 which had plans to spend more (over half at 11-30%).
- Areas holding the most intention to increase investment follow a similar pattern to 2023 results – with more business development taking the lead and over a fifth looking to invest in AI.

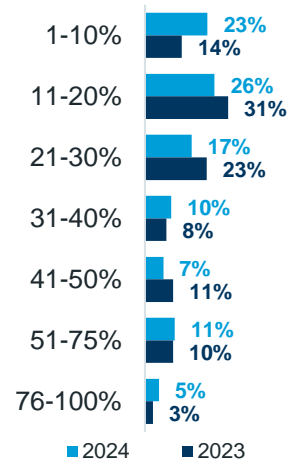
In 2024, 41%
of business decision
makers **intend to increase**
investment in their
business in the next 12
months

Versus 41% in 2023

Versus 46% in 2022

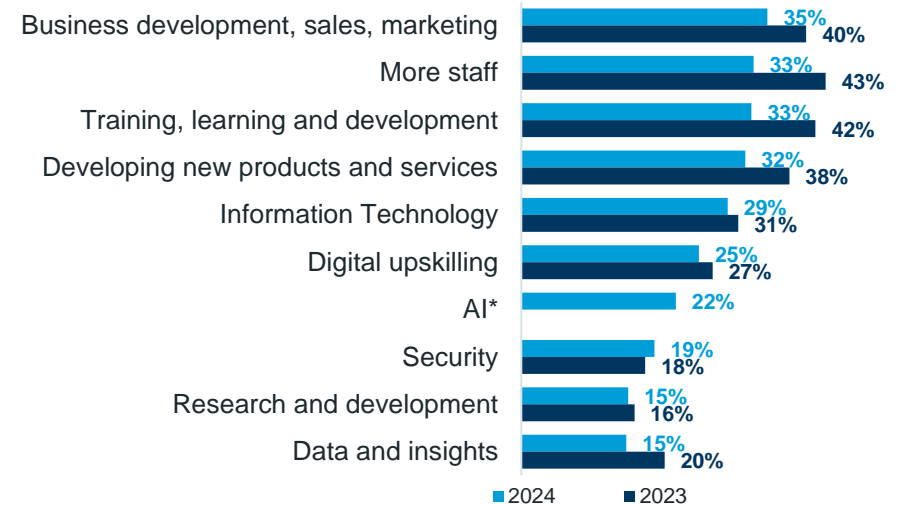
Versus 28% in 2021

Q: By how much do you intend to increase investment in the next 12 months?



Base: Among businesses who intend to reduce costs, 2023 (n=544), 2024 (n=509)

Q: In which areas do you intend to increase investment in? (select all that apply)



Base: Among businesses who intend to reduce costs, 2023 (n=286), 2024 (n=288)
* New options added in 2024

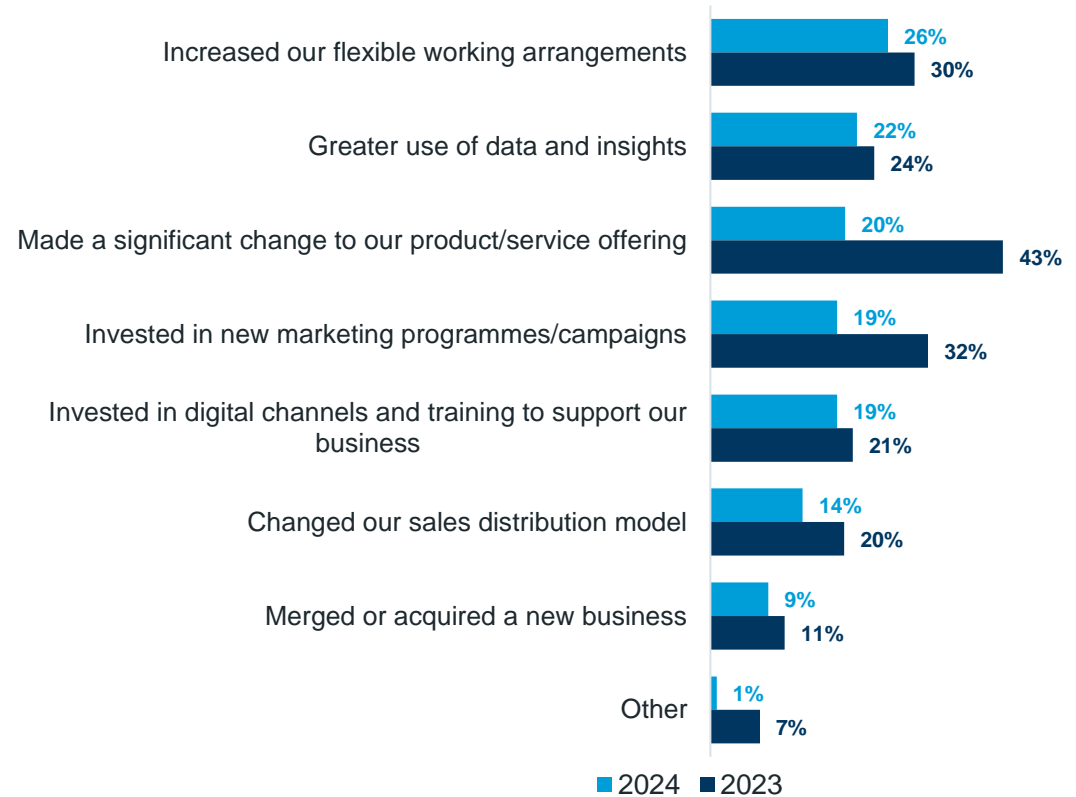
↓ ↑ Represents a significant increase/decrease based on a 95% CI compared to 2023

New ventures

Adding a new product or service offering has remained consistent with previous years' results, at just over a third.

Retail/Trade are the only industry that are significantly more likely to have offered a new product or service.

Q: What has your business started doing that is new in the past year?
(select all that apply)



Base: Among businesses who have started doing something new, 2024 All (n=704) 2023 (n=318)

↓↑ Represents a significant increase/decrease based on a 95% CI compared to 2023

1.4

What will help businesses?

PERCEPTIVE

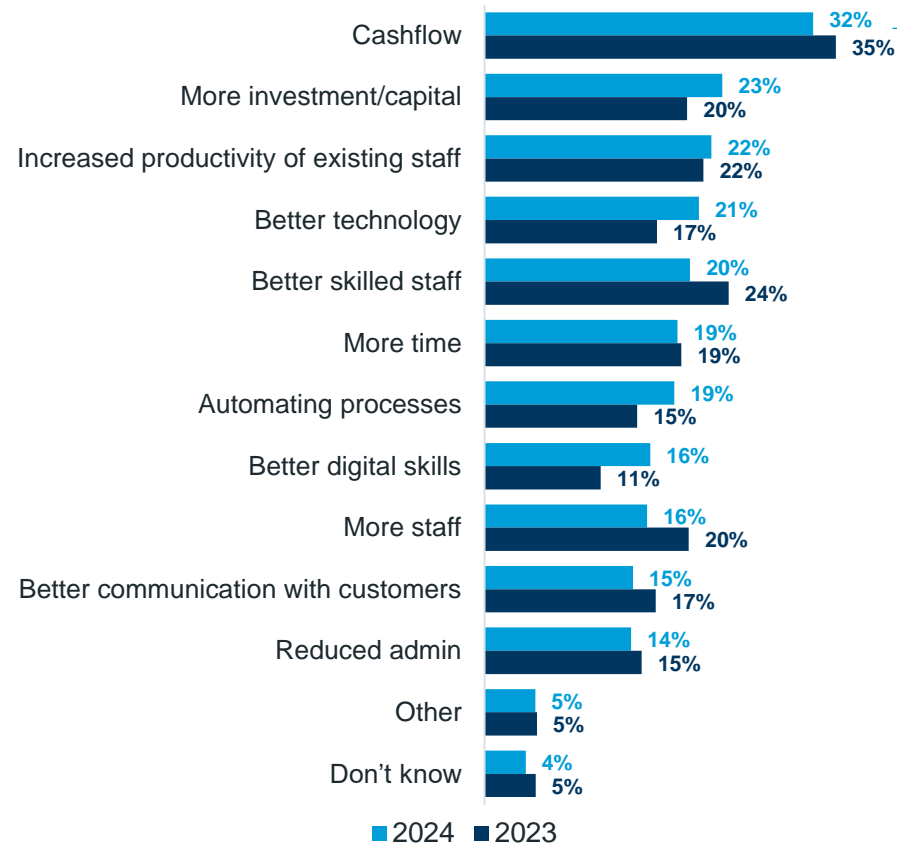
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Helping businesses thrive

- Cashflow is the most important aspect to help businesses thrive – however a slight drop on 2023 results.
- Smaller businesses (less than 20 employees) and ‘surviving’ businesses are significantly more likely to reference cashflow to help make their business thrive.
- Better technology has increased on 2023 results and is significantly more likely to be referenced by ‘thriving’ businesses who are more willing to invest.
- Education and Training businesses are significantly more likely to reference ‘more time’ as time can often be a factor in the capacity for people to learn and grasp new concepts.

Q: What would help your business thrive? (select all that apply)



Smaller businesses (1-20 employees) and ‘surviving’ businesses are significantly more likely to reference Cashflow (38% and 48%, respectively).

Thriving businesses are significantly more likely to reference Better technology (41%).

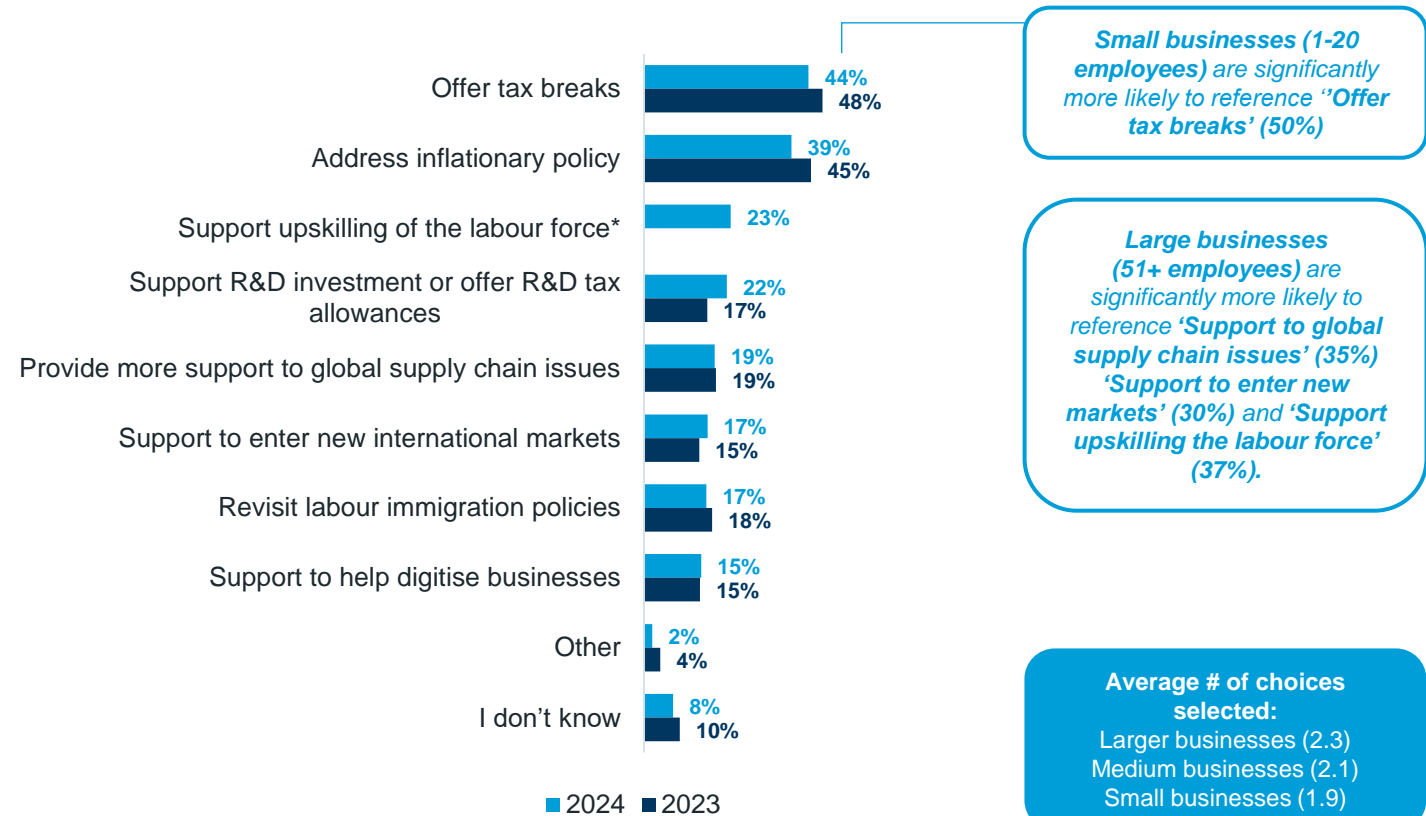
Education and Training businesses are significantly more likely to reference More time (43%).

Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701)

Central government support

- Two areas central government could help support businesses in are tax breaks and inflationary policy. These results are consistent with 2023, however, less mentioned this in 2024.
- Overall, all other key factors have increased or remained the same in comparison to 2023.
- Larger businesses identify more aspects overall – with particularly higher skews on wanting support around global supply chain issues, support to enter new international markets, and upskilling of the labour force.
- Notably, the average number of choices selected in 2024 for all businesses increased this year, meaning there is more opinion on how the current government is affecting business climate at the moment.

Q: How do you think central government could help better support you/the business to improve? (select all that apply)



Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701)
 *Note new response options added in 2024



02

Productivity

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Summary

PRODUCTIVITY

What drives productivity in businesses and what will help drive it further?

Over one-third of businesses claim their productivity has increased compared to the previous year. More than half claim it has remained the same.

- The biggest driver of productivity is also the biggest barrier that businesses face – staff.
- Better use of technology is also a top priority for businesses in driving productivity within the business. Longer tenured businesses (8-10 years) are specifically interested in learning how artificial intelligence (AI) can help them achieve this.
- While IoT is still considered more important in driving productivity, the interest in using AI has increased in the past year, with more than half of businesses considering it to improve their productivity.

What does our working model now look like in New Zealand?

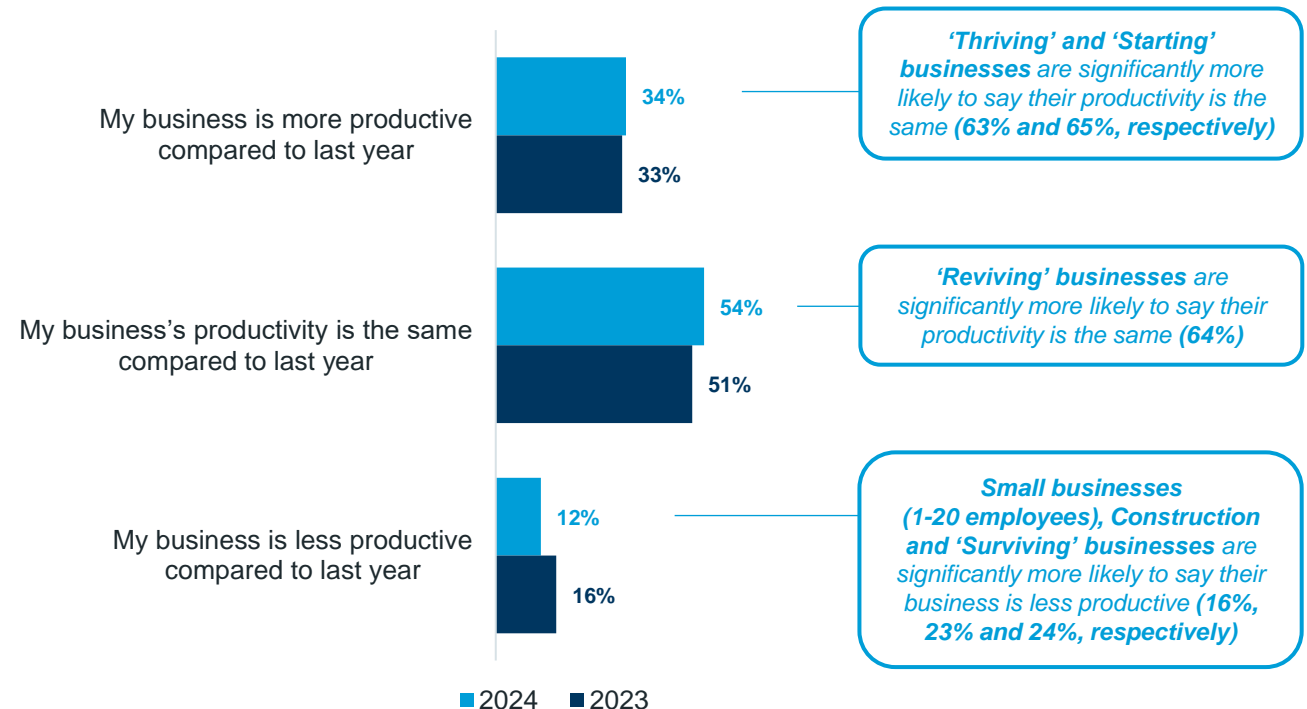
- While more than half of businesses have a fully/mostly in person working model, over one-third have adopted a hybrid model. Half of these businesses claim this approach has paid dividends when it comes to making the business more productive.



Business productivity

- More than half of businesses claim their productivity levels are the same compared to last year – significantly driven by ‘reviving’ businesses.
- Productivity has increased for more than one-third of businesses and is elevated among those who are ‘thriving’ and ‘starting’; only a few claim to be less productive.

Q: How would you describe the productivity of your business compared to last year (2023)?

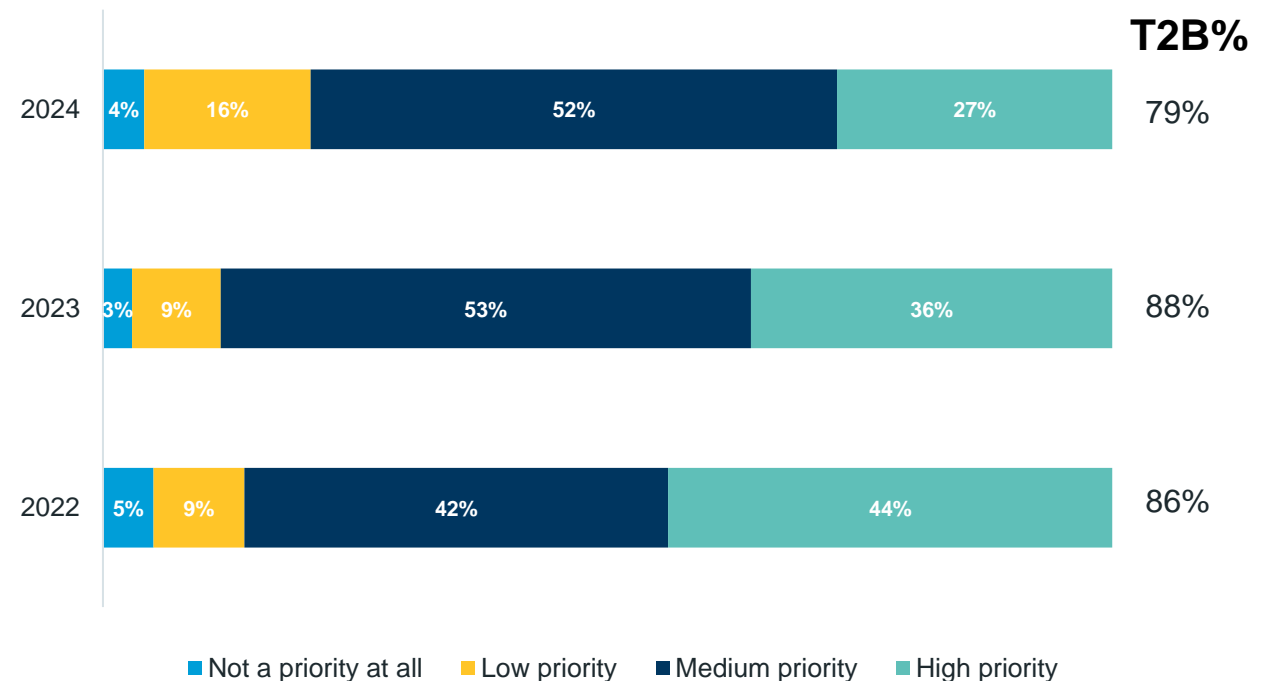


Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701)

Importance of productivity

- Majority of businesses deem increasing productivity is a priority, however, this is lower than previous years.
- There is now more proportion of lower priority, and less of medium to high priority amongst businesses.

Q: How would you describe the productivity of your business compared to last year (2023)?

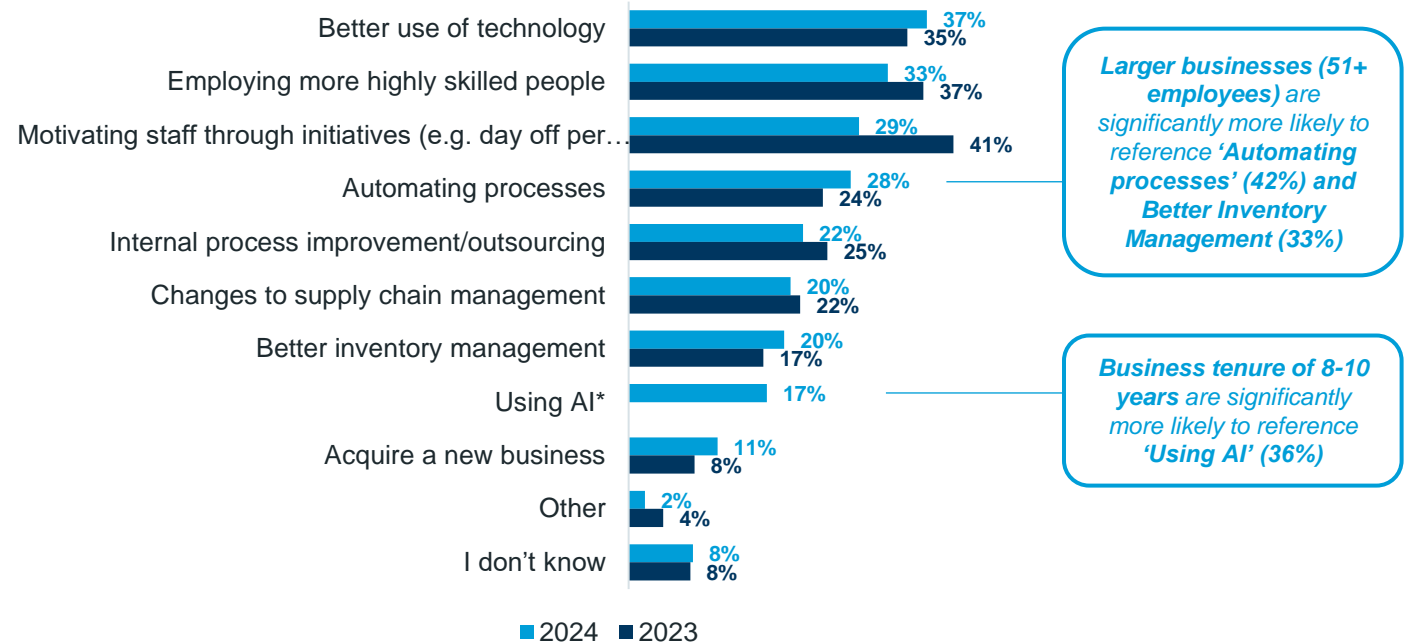


Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701), 2022 (n=702)

Achieving higher levels of productivity

- Better use of technology is the primary driver behind helping more than a third of businesses achieve higher productivity.
- Automating processes, better inventory management, acquiring a new business and using AI are all areas of business that decision makers in 2024 believe will result in better productivity when compared with 2023.

Q: Which of the below do you think will help you to achieve higher levels of productivity in your business?

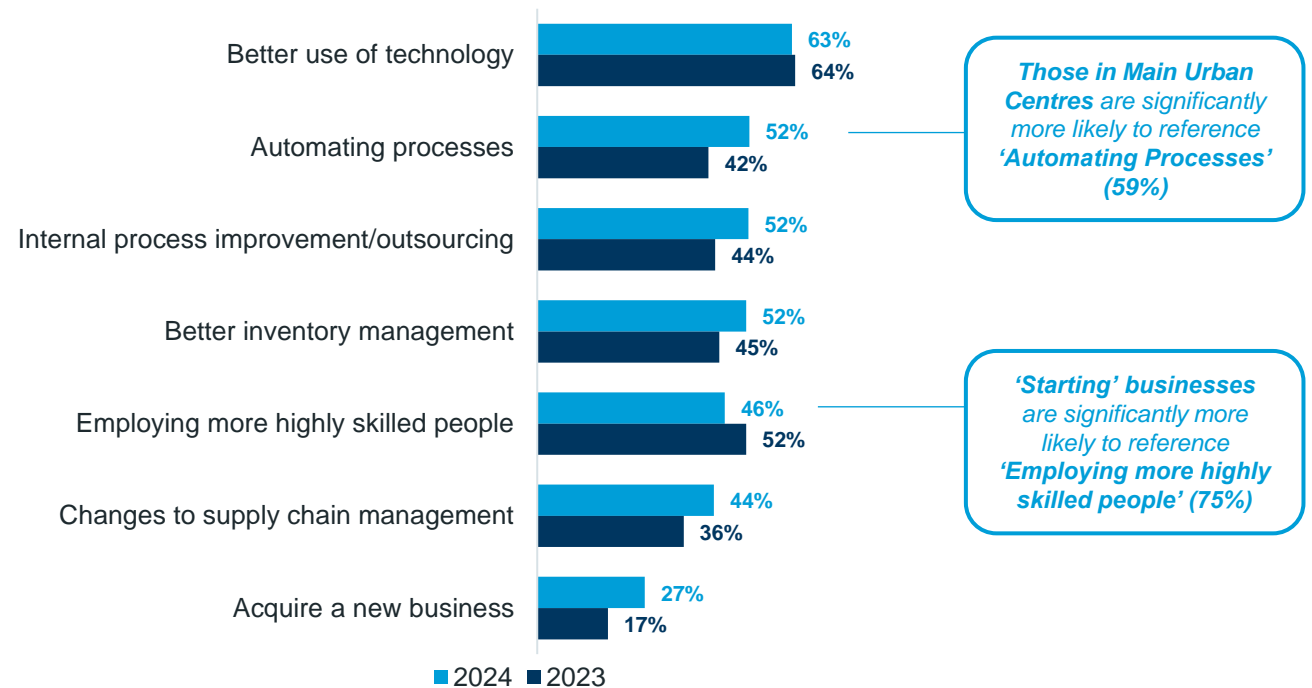


Base: Among those who see productivity as a medium to high priority, 2024 (n=559), 2023 (n=613)
 *New option added in 2024

Key aspects to invest in

- Leveraging technology continues to be a key investment area to improve productivity – with almost two-thirds of businesses claiming they are likely to invest in better use of technology in the coming year.
- Automating processes, internal process improvement and better inventory management all equally share investment potential amongst businesses in the next 12 months. All increasing from 2023.

Q: Which of the below do you think will help you to achieve higher levels of productivity in your business?

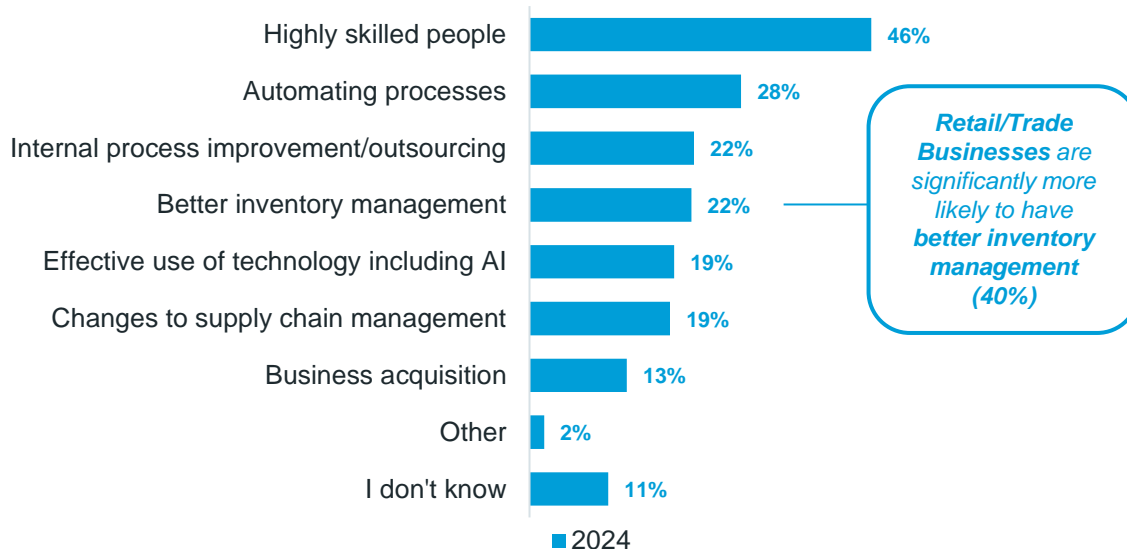


Base: Among those who see productivity as a medium to high priority, 2024 (n=573), 2023 (n=613)
 *Note T2B% shown – 'Likely' + 'Highly likely'

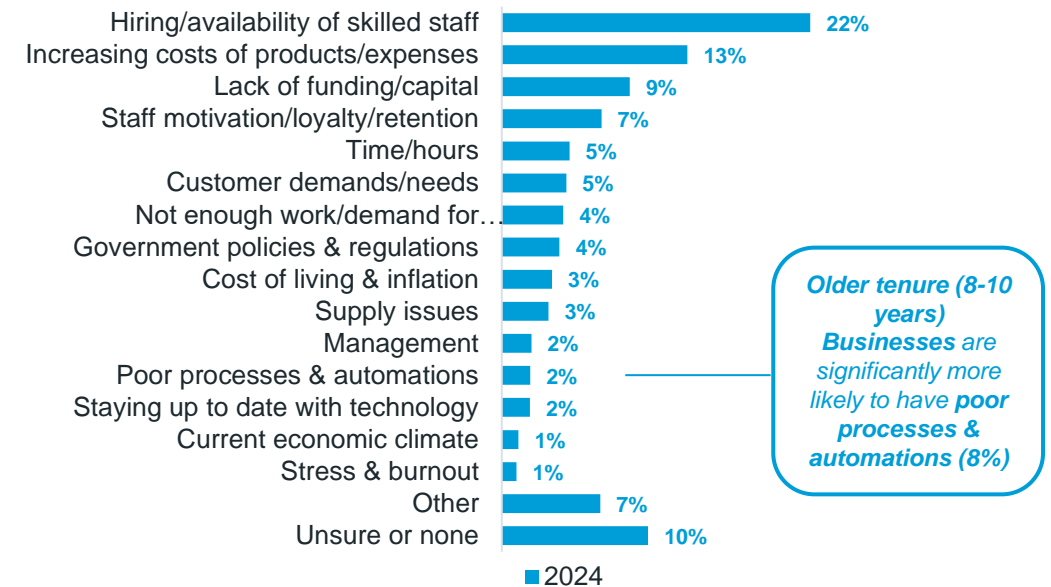
Drivers and barriers to productivity

- The biggest drivers of increased productivity for almost half of businesses is the highly skilled people available to them.
- Likewise, the biggest barriers for businesses appear to be the lack of hiring and the availability of highly skilled people/staff.

Q: What are the biggest drivers of increased productivity in your business?



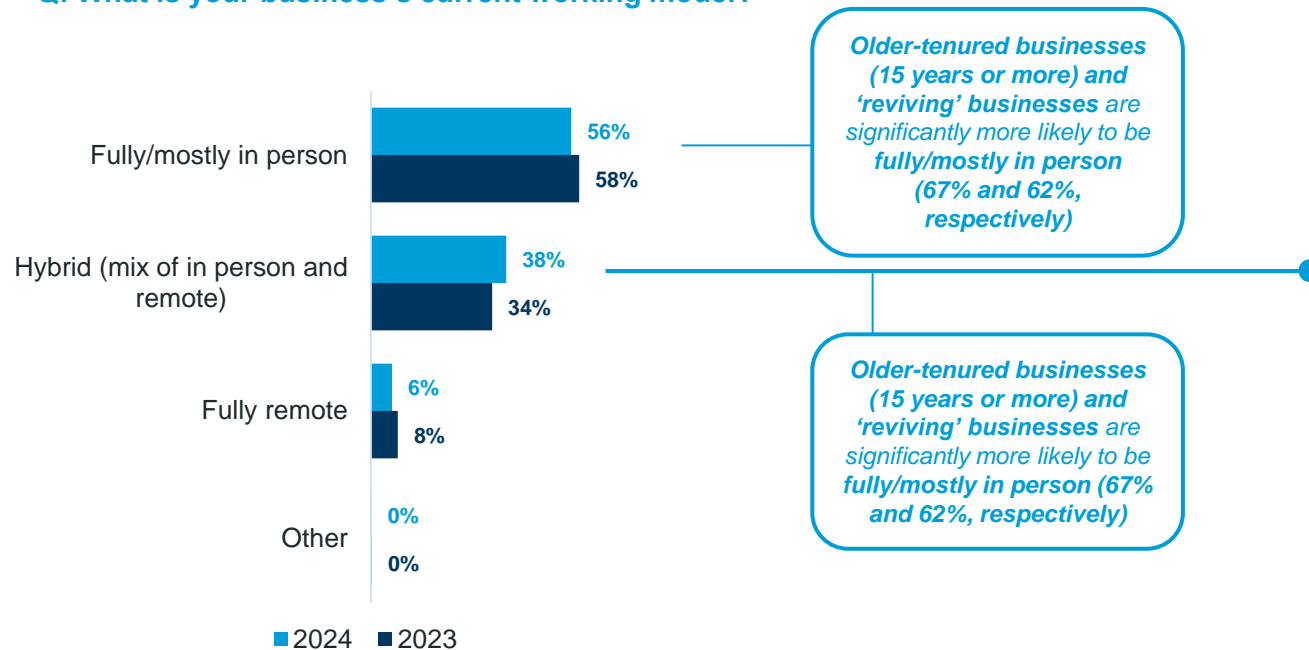
Q: What are the biggest barriers to increasing productivity in your business?



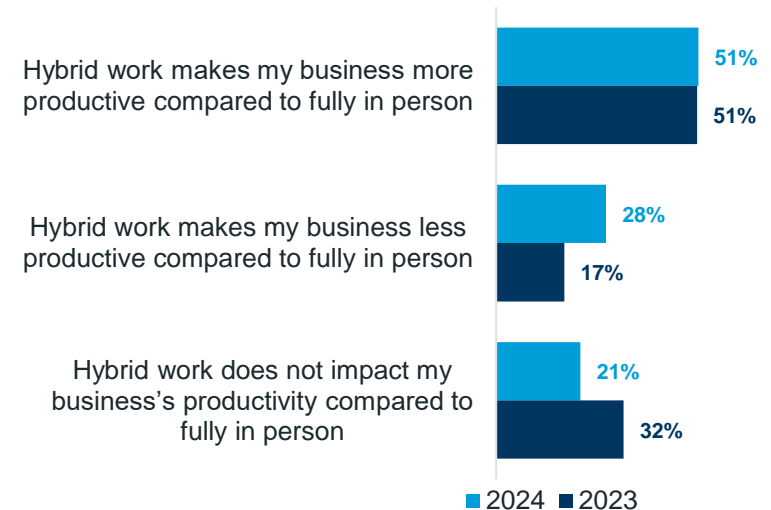
Current working model

- More than half of businesses operate on a fully/mostly in person working model – driven by older-tenured and ‘reviving’ businesses.
- More than one-third of businesses have adopted a hybrid way of working; elevated amongst larger businesses (51+ employees) and Auckland-based.
- Among businesses who utilise a hybrid working model, more than half claim that this style of working increases productivity.

Q: What is your business’s current working model?



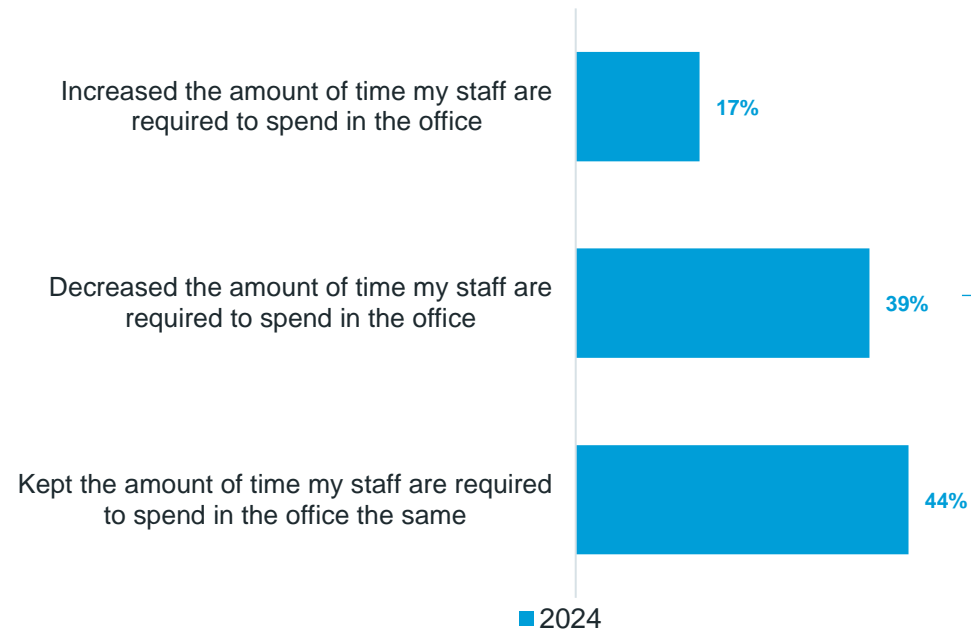
Q: How would you describe the impact of the hybrid working model on your business?



Staff in the office

- Of the hybrid working models, more than a third of businesses have decreased the amount of time staff are required to be in the office, and a small 17% have increased this amount.
- Short tenure businesses (2-3 years old), are more likely to have decreased the amount of time (59%).

Q: Over the past year, have you:



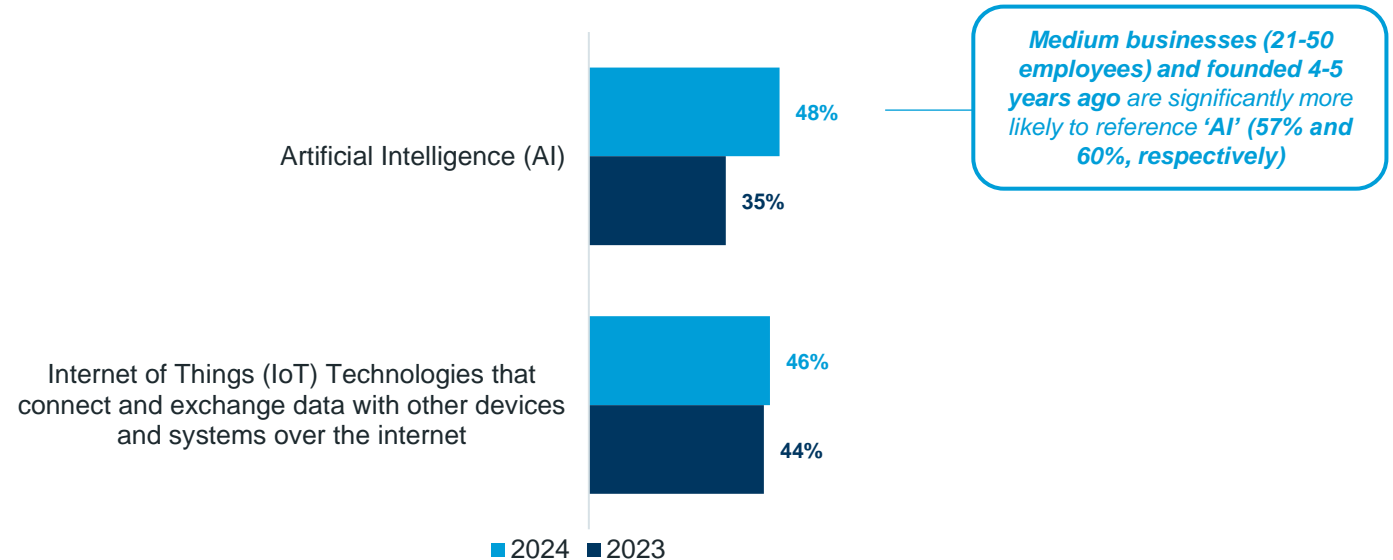
Younger-tenured businesses (2-3 years) are significantly more likely to reference 'decreased the amount of time in the office' (59%)

Base: Among businesses who use a hybrid working model, 2024 (n=266)

Next steps in the productivity journey

- Artificial Intelligence (AI) is seen as the next step in increasing business productivity compared to IoT for previous years.
- Medium businesses and medium-term tenure (4-5 years ago) are significantly more likely to consider AI in 2024.

Q: When you consider the next step in your productivity journey, do you see a role for the following new technologies increasing productivity?

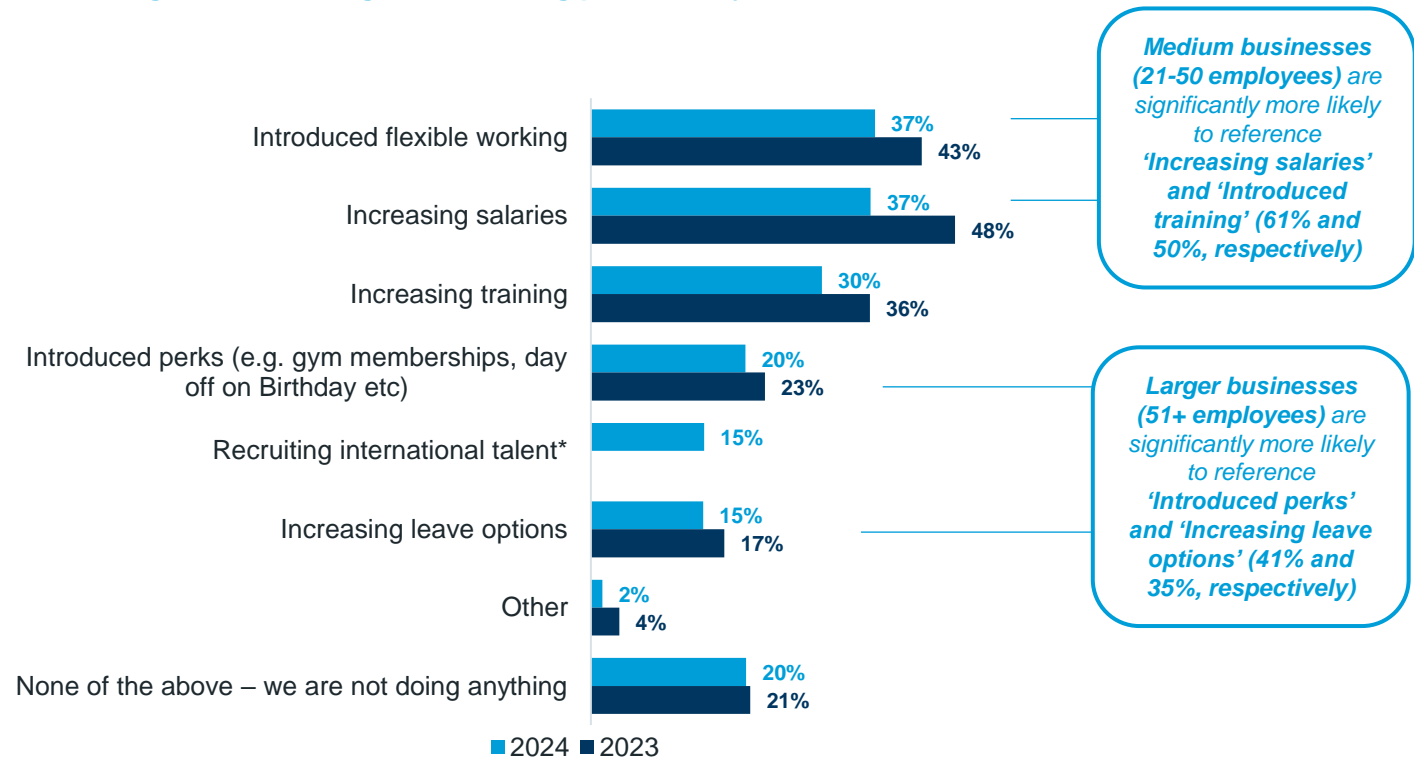


Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701)
*Note only 'Yes' % shown

Attracting qualified labour

- Increasing salaries and introducing flexible working options continue to be key initiatives to attract and retain qualified labour this year; declining on 2023.
- Larger businesses are significantly more likely to have introduced perks and increased leave options compared to other employing groups (33% → 41%, 19% → 35% respectively).

Q: When you consider the next step in your productivity journey, do you see a role for the following new technologies increasing productivity?

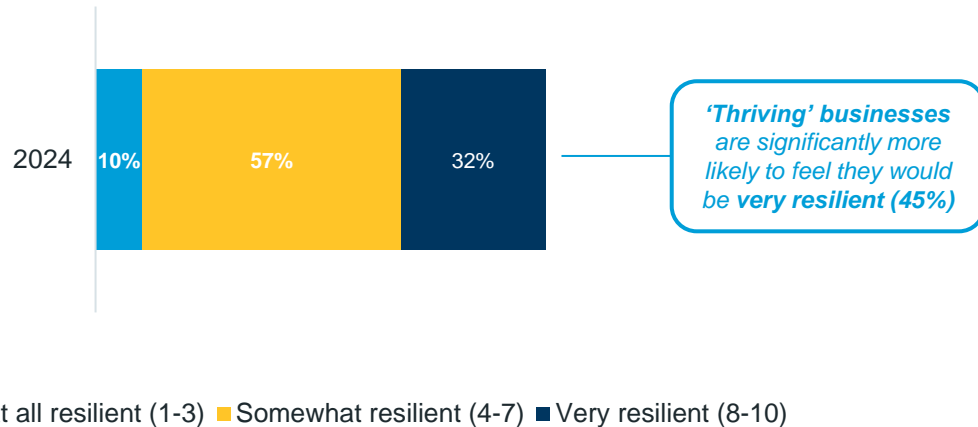


Base: Total Employing Business decision makers, 2023 (n=701),
*New option added in 2024

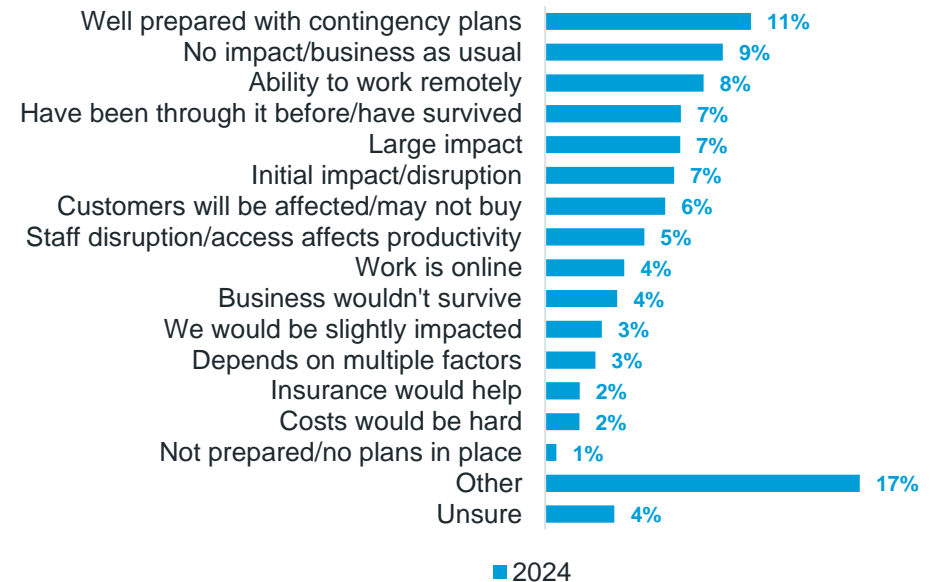
Resilience to significant disruption

- Almost one third of businesses would feel very resilient if it came to significant business disruption.
- The majority have expressed that they now have contingency plans in place should any disruption occur, likely because COVID-19 lockdowns have driven these processes. Those that would not be resilient are likely to be ‘surviving’ businesses.
- The primary reason for being somewhat or very resilient during a natural disaster (or similar), is due to the current business contingency plans in place.

Q: On a scale of 1-10, how resilient do you think your business would be if affected by a significant disruption like a cyclone, earthquake or lockdown?



Q: Why did you give that answer?





03

Digital growth and business innovation

FIGHTING
FOR FAIR
FOR KIWI BUSINESS



Summary

DIGITAL GROWTH AND BUSINESS INNOVATION

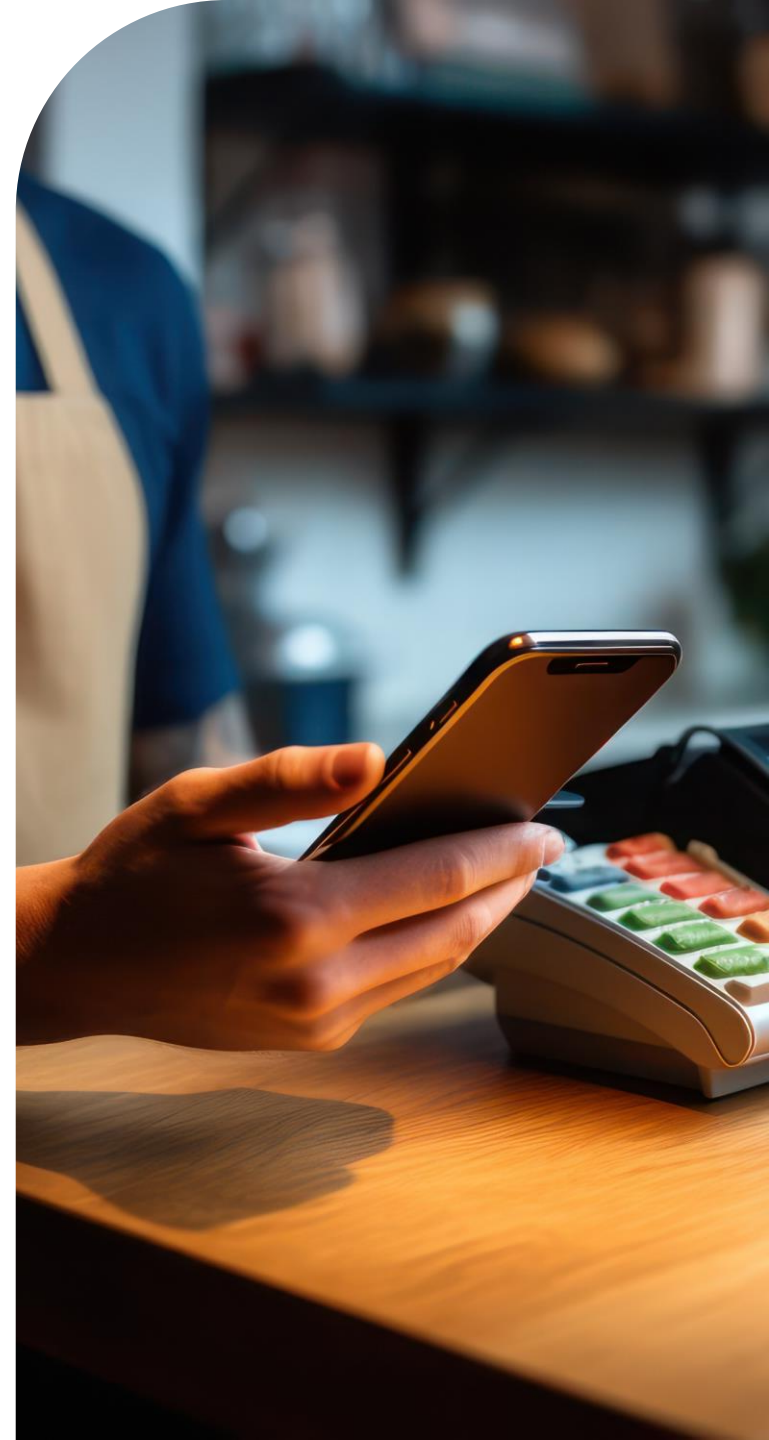
Confidence levels when it comes to digital tech

More than half of businesses think they possess the digital skills required to help their business get ahead.

This decline in confidence since 2023 is evident as businesses grapple with uncertainty, lack of motivation, and time constraints when it comes to upskilling in the digital tech space.

This is also confirmed by the slight drop in the average number of digital tools that are being used by businesses; from 4 to 3.6 tools in the last 12 months. However, interest in implementing artificial intelligence (AI) tools into businesses (in 1-2 years) has been growing.

Businesses of all sizes are still using multiple digital tools to progress the business. 'Thriving' businesses are most likely utilising a higher amount on average.



Summary

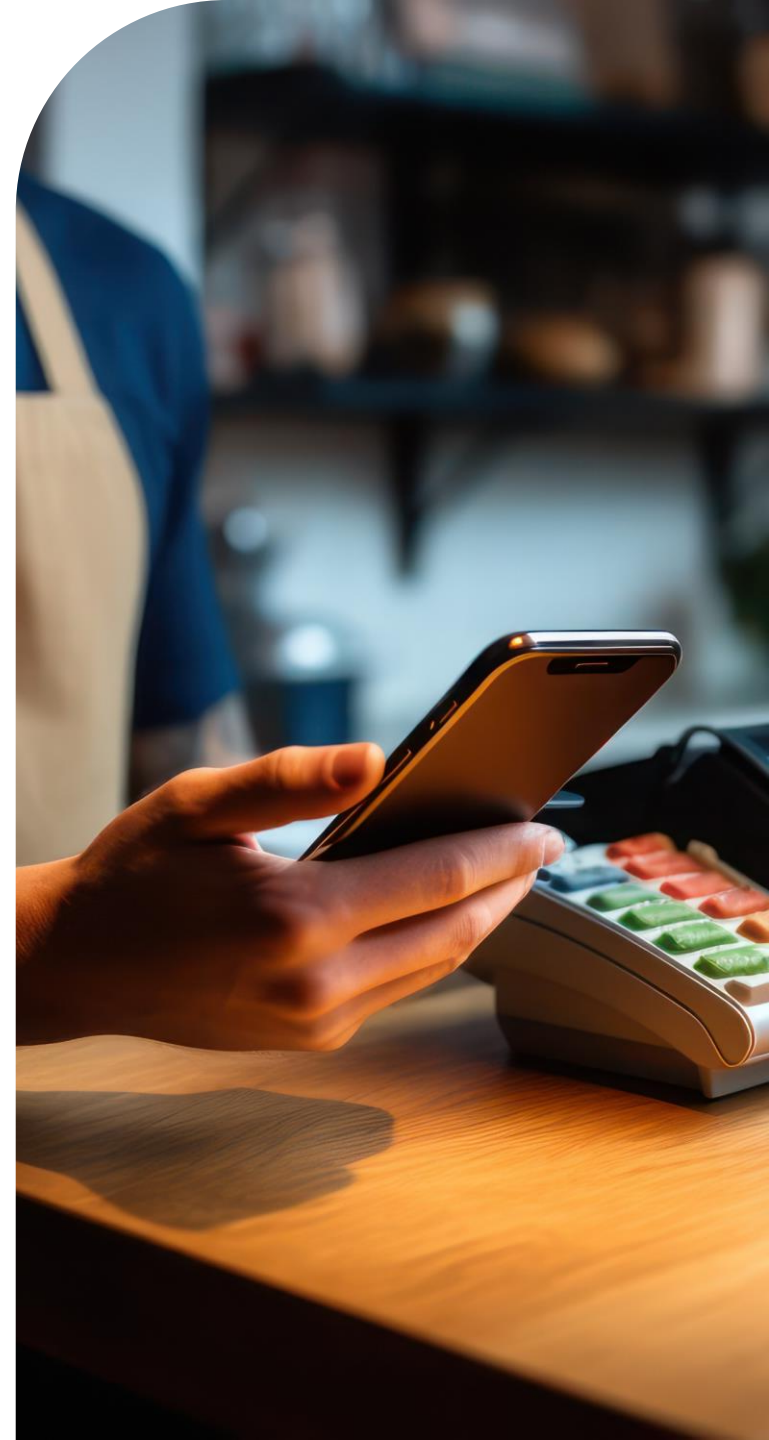
DIGITAL GROWTH AND BUSINESS INNOVATION

Digital tech enabling productivity

Businesses are still noticing the positive impact that digital technology brings when it comes to productivity. We witness the power of the business phases coming through this year. As the state of the business improves (from 'surviving' > 'thriving'/'starting'), so do the rewards of productivity.

Security breaches

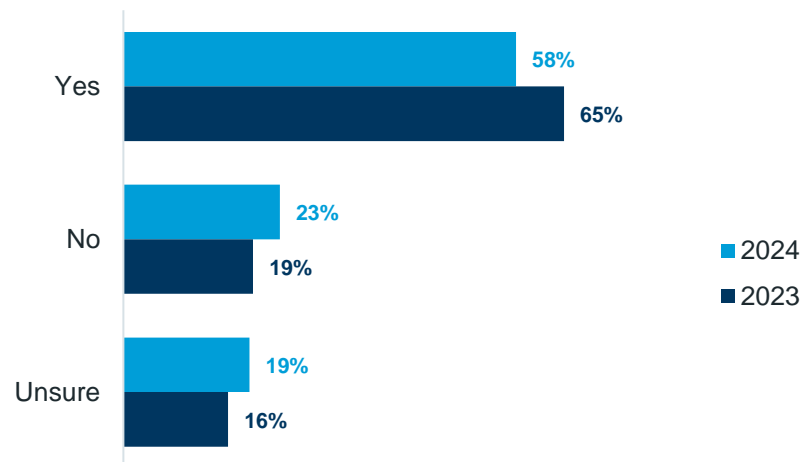
While the level of worry regarding security breaches remains relatively low, fewer businesses are expressing they're "very worried" this year. However, a higher proportion of businesses state they are not worried/bothered by them at all as they have other pressing issues on their radar.



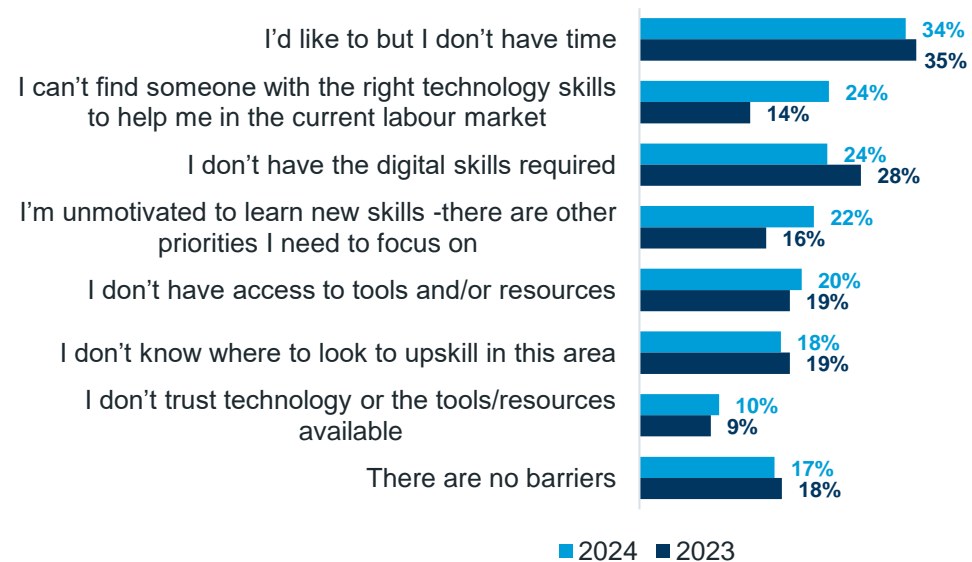
Digital skills and barriers

- Perceptions surrounding individual digital skills have dropped since 2023, with slightly less decision makers believing they possess the digital skills to help their business get ahead.
- Barriers also remain consistent with not having the ‘time’ to upskill in the digital space for more than a third of businesses. There is also less awareness of having someone with the right tech help businesses in the current market (up 10pp on last year).

Q: Do you think you possess the digital skills to help your business get ahead?



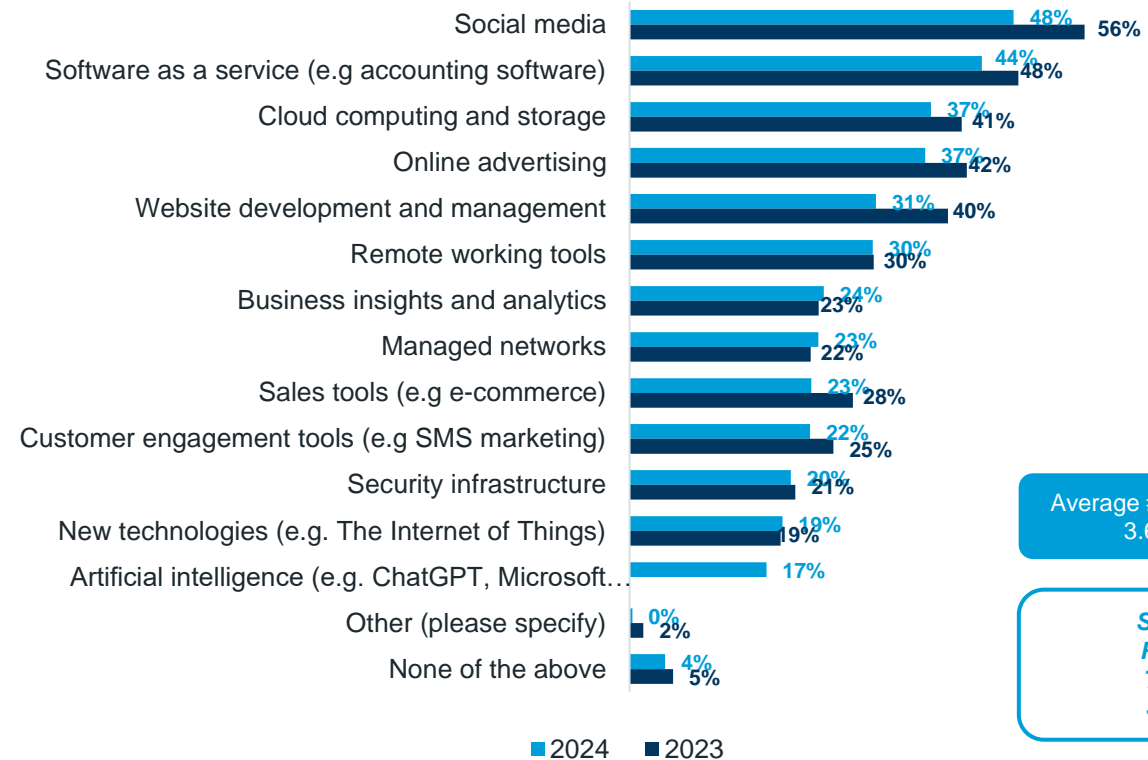
Q: Are there any barriers that are preventing you from upskilling in the digital space?



Current digital tool use

- Businesses are still using a large array of tools, with those in the 'starting' phase using more tools on average.
- Compared to 2023, we have seen a large decrease in the use of social media, website development and management and sales tools.
- Retail/Trade are significantly more likely to use sales tools (42%).
- Remote working tools are still important for Professional, Scientific, and Technical Services (52%).

Q: Which digital tools does your business use? (select all that apply)



Average # of choices selected:
3.6 vs 4.0 (2023)

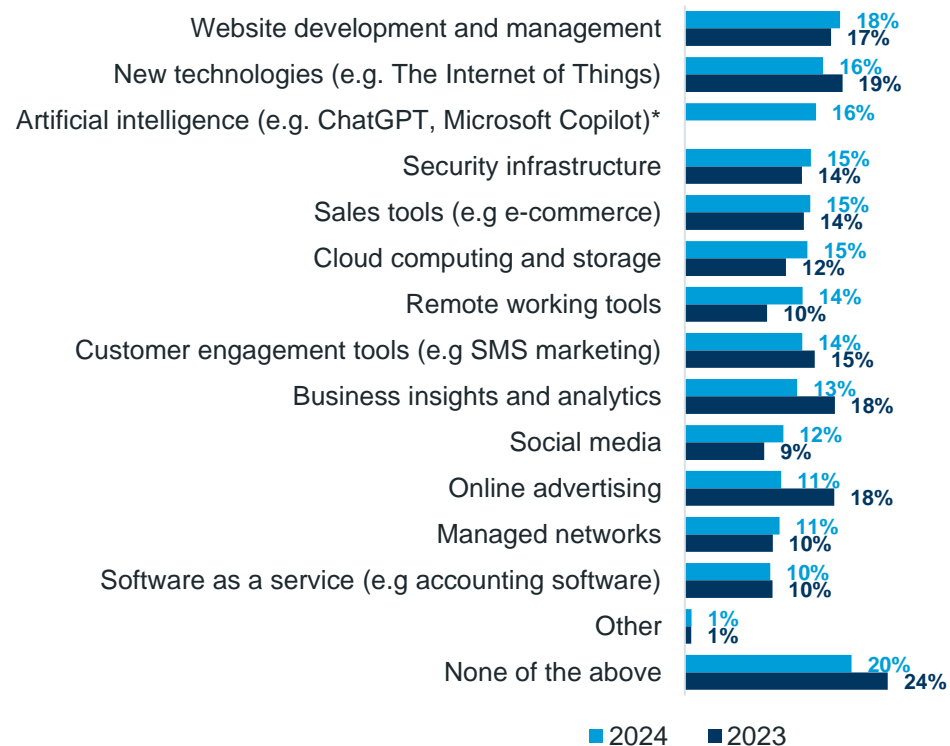
Surviving: 3.1
Reviving: 3.8
Thriving: 4.1
Starting: 4.5

Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701)
*New option added in 2024

Future digital tools to incorporate

- The need for website development/management tools has increased slightly, and remains of the top anticipated business tools in the coming years.
- Artificial intelligence (AI) has been identified as a tool businesses will use highly over the next year or so. This is mainly amongst medium tenure businesses of 4-5 years (28%)
- A fifth of businesses don't believe they will need any of these tools in the next year or so. These are primarily skewed from older tenure businesses (15+ years 31%) and in a rural location (37%).

Q: Which digital tools do you think your business will need in the next 1-2 years?
(select all that apply)

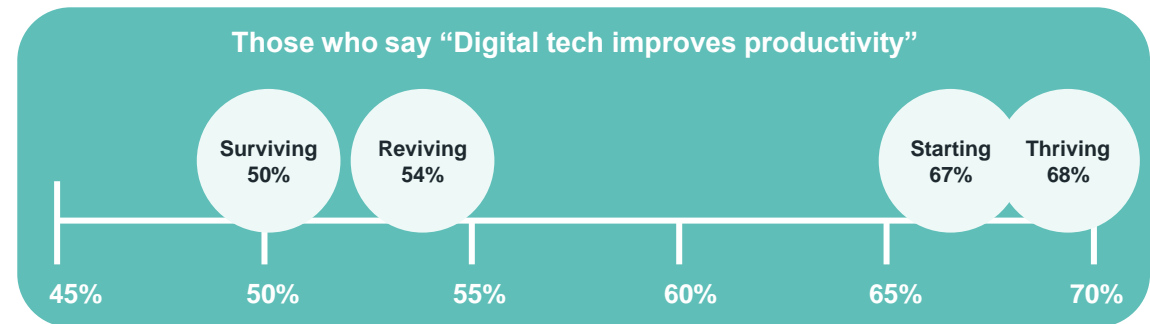
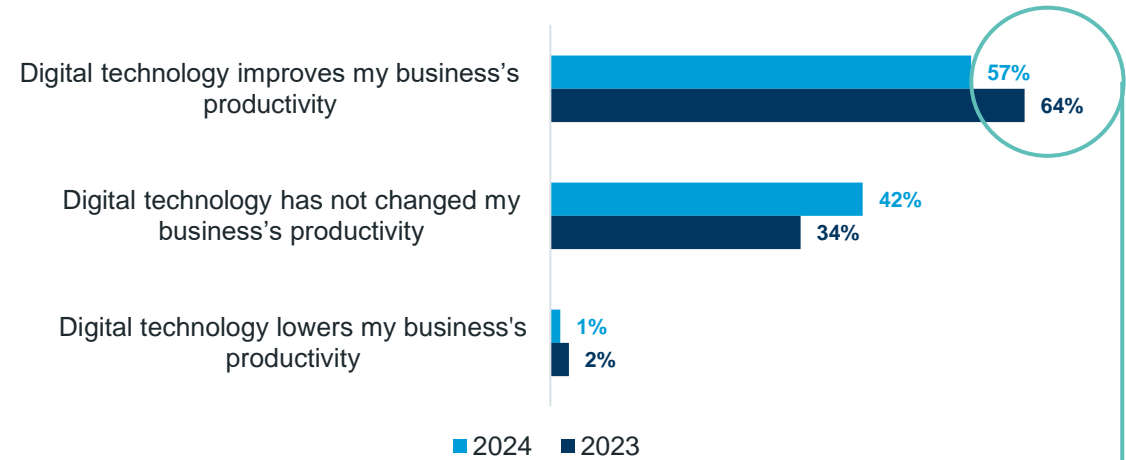


Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701)
*New option added in 2024

Digital technologies impact

- Overall, more than half of businesses believe that digital technology has improved productivity, however, this has dropped on 2023 results.
- More businesses have stated in 2024 that digital technology has made no change to their productivity.
- Similar to 2023, as the business state improves, more businesses then reap the rewards – only 50% of ‘surviving’ businesses say digital tech improves their productivity compared to ‘thriving’/‘starting’, where it reaches 68% and 67%, respectively.

Q: Which of the following best describes what digital technology achieves for your business?

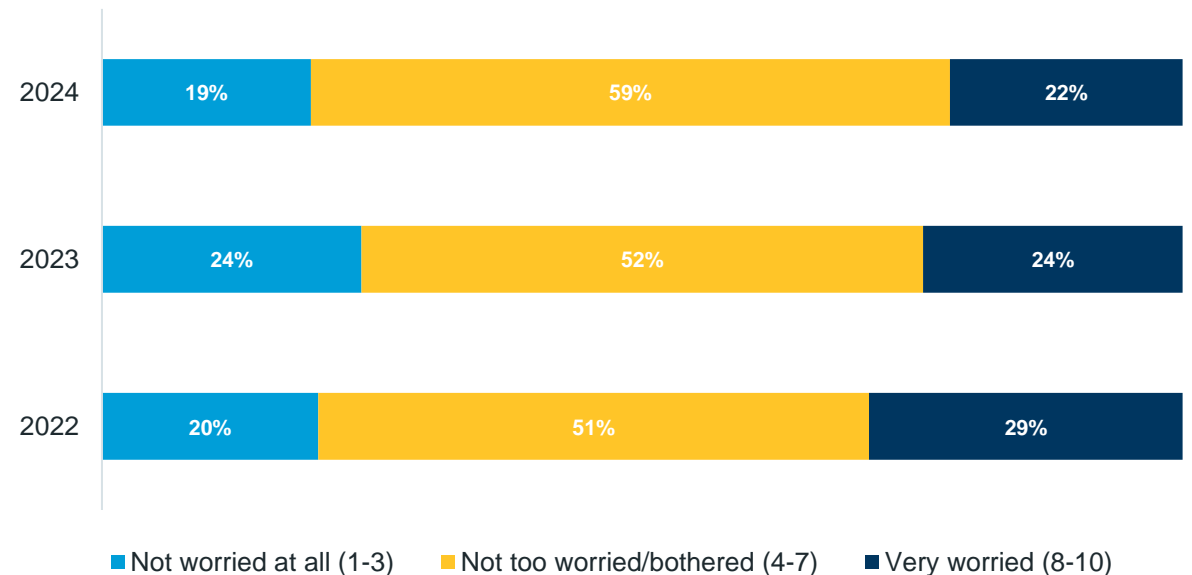


Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701), 2022 (n=702).

Are businesses worried about a security breach?

- Worry around 'security breaches' has lessened since 2023.
- The more worried businesses are medium sized (21-50 employees) (29%) and 'starting' businesses (35%).
- There are also less businesses feeling very worried, with more in the middle-ground of being not too bothered.

Q: On a scale of 1 to 10, with 1 being not worried at all and 10 being very worried, how worried are you about a security breach in your business?

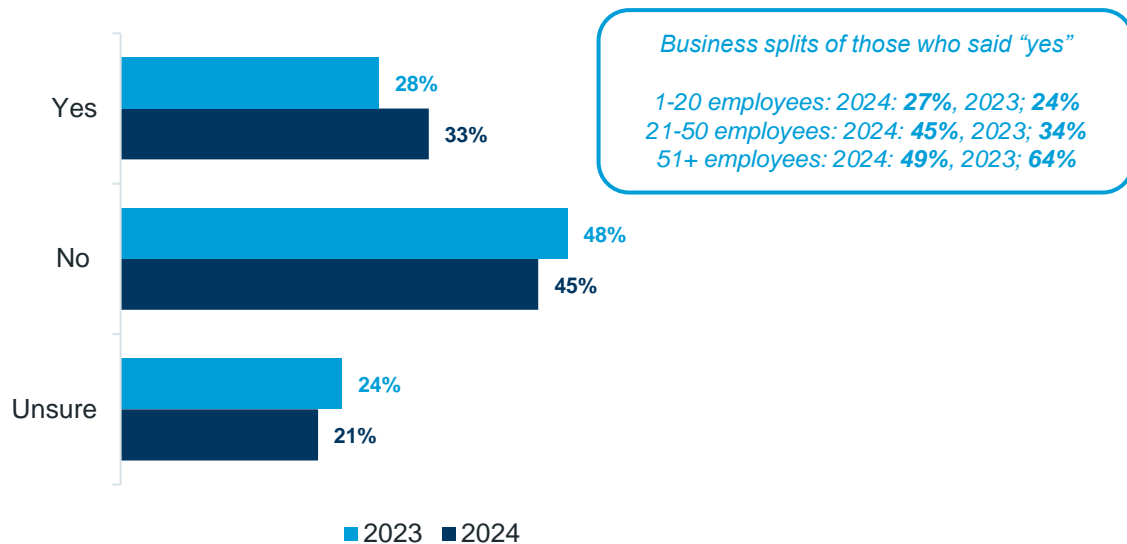


Base: Total Employing Business decision makers, 2024 (n=704), 2023 (n=701), 2022 (n=702).

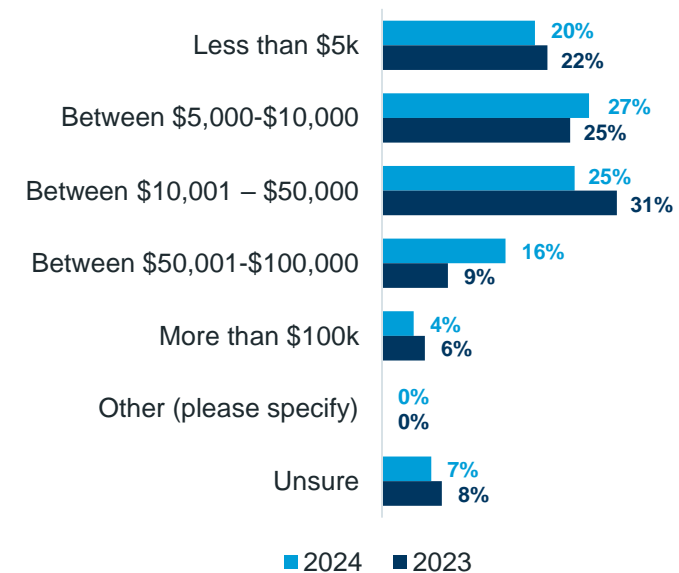
Spend on cyber-security

- Overall, the intention to increase spend has declined since 2023. This is notable among larger businesses with 51 or more employees.
- More businesses are willing to spend between \$50,001-\$100,000 in 2024, however the largest proportion remains in the \$5,000-\$50,000 spend range.

Q: In 2024, do you plan to increase the spend on data/cyber-security to better protect your business?



Q: How much do you expect to spend on improving your data/cyber-security in 2024?





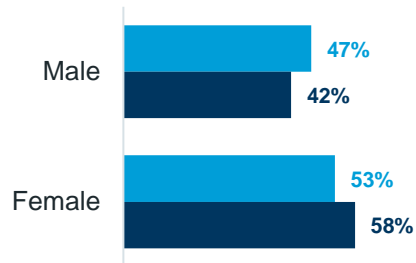
04

Firmographics

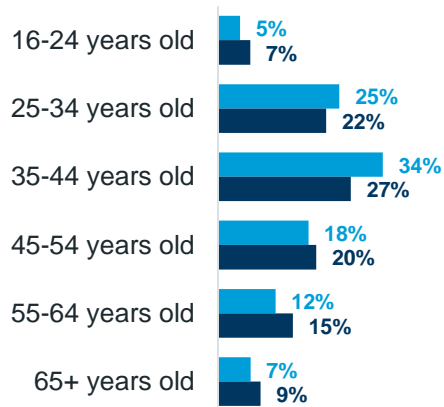
Who we spoke to



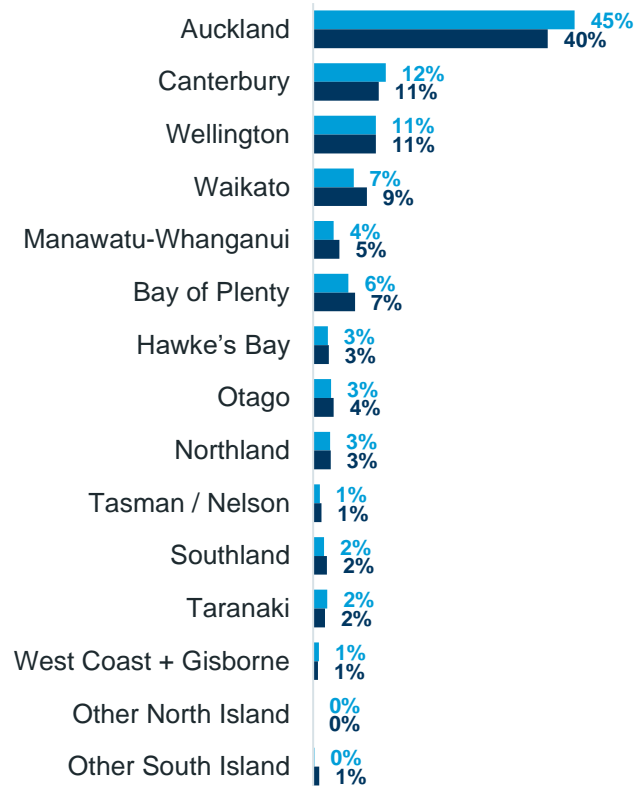
Gender



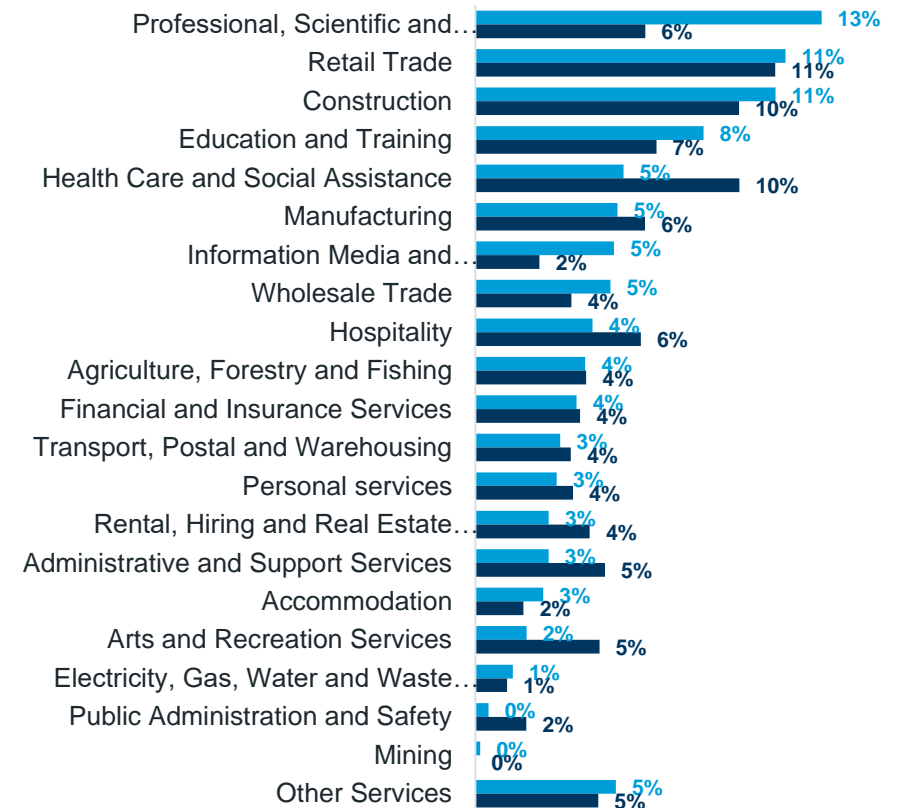
Age



Region



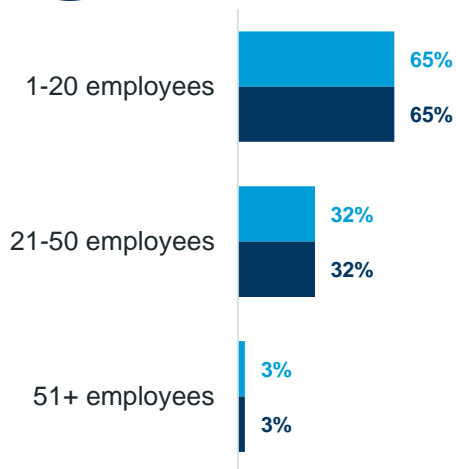
Industry



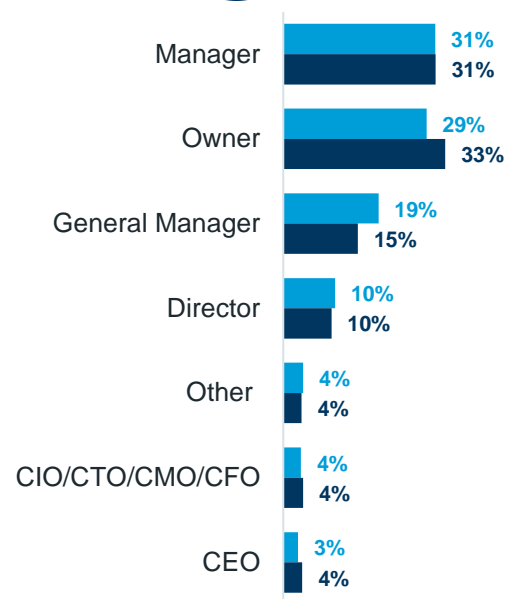
Who we spoke to



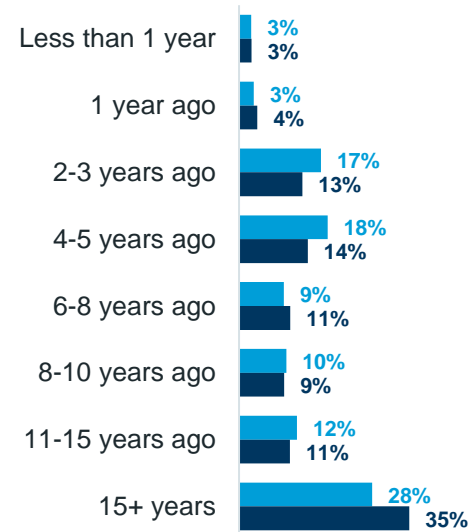
Employing size



Role



Business tenure



Number of physical sites

