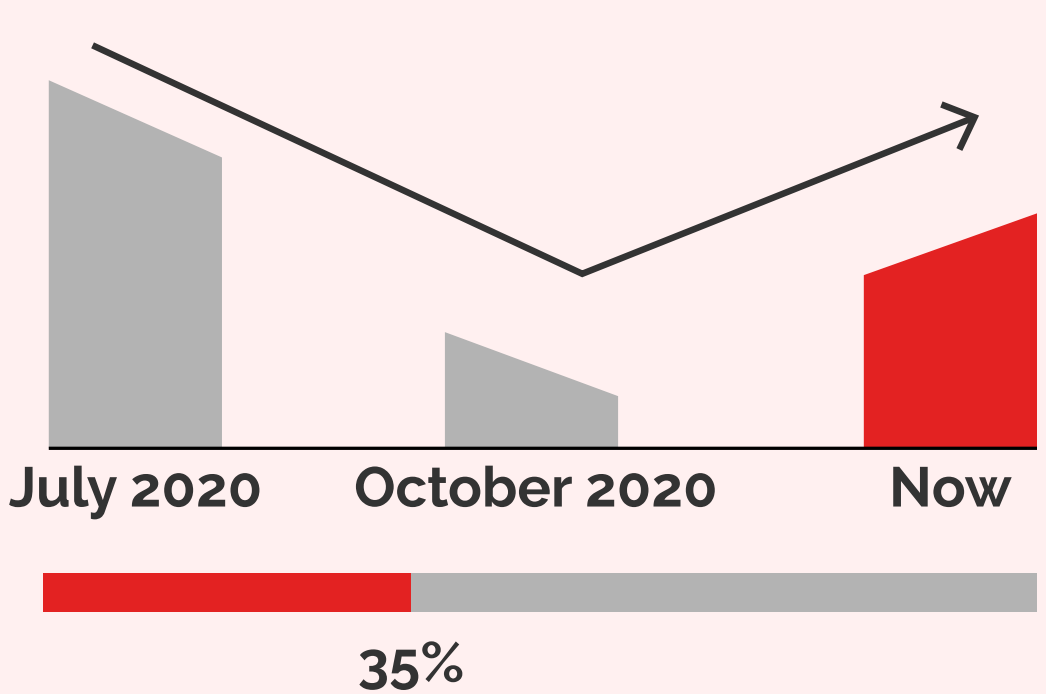


BASED ON THE COMPETENCE OF THE LEADING HEADS OF THE SWISS BUSINESS COMMUNITY

n= 180+ respondents in Top Management or Management positions

INSIGHTS Q1 - 2021

BUSINESS DEVELOPMENT



Compared to October 2020, business development has improved slightly, but the result is still below the level of July 2020.

For 35% of the companies business development was negative!

CURRENT CHALLENGES

Overcoming the crisis is still the biggest challenge. Value is down despite lockdown and manager have become accustomed to the new normal.

Other core topics are:



Difficult customer development



Digitalization



Uncertain market development

9% of top management expects difficult regulatory conditions!

DEVELOPMENT OF THE DEMAND SITUATION

50% expect demand to develop positive.

High optimism for all surveyed industries as well as target markets. **There is a significant increase since the beginning of July 2020**, especially for the IT sector and target market Switzerland.



COMPETITOR MARKET ENTRY



The **opportunities for market entry** have continuously worsened.

71% rate this as difficult. The reason for this is the necessary **capital requirements**.

CURRENT ECONOMICAL ENVIRONMENT



The generally **high intensity of competition** and the associated **bargaining power of customers** are the biggest influencing factors. By far the highest intensity of competition is in the area of **IT. Consulting & Professional Services** are primarily influenced by the negotiating power of customers.

The **cut-throat competition** and the **bargaining power** of customers will continue to **increase**.

FUTURE MARKET DEVELOPMENT



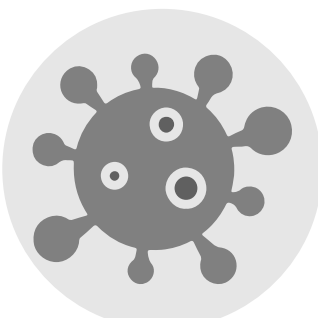
Due to the high level of market saturation, the **degree of differentiation of products and services will continue to increase**.

This applies above all to the areas of **consulting & information technology**. Significant market growth is expected for the ICT area. A clear difference to other industries!



RECRUITING

Almost 2/3 of the companies have **difficulties in finding qualified employees**. The need for specialists in the field of IT is particularly high.



INFLUENCE OF COVID-19

8% of the companies are acutely threatened by the current crisis.

FORECAST GENERAL MARKET CONDITIONS



Generally very **difficult** conditions for **market entry**.

Financial service providers & insurance companies expect **high regulatory pressure** (government requirements).