

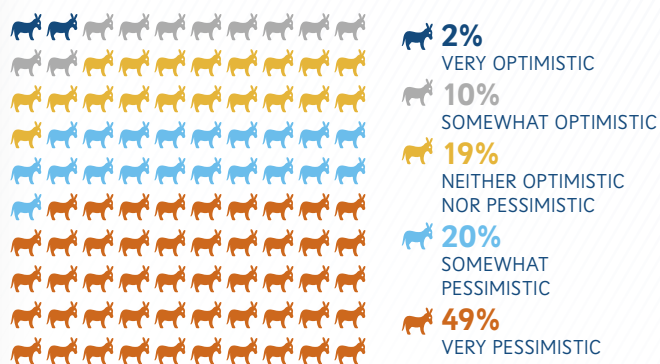
Q4 2013

SMB JOB GENERATION OUTLOOK

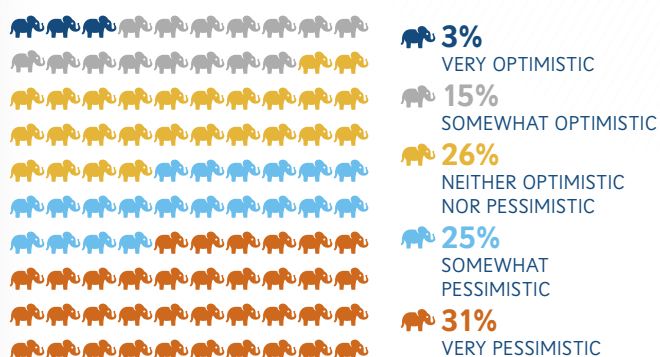
BIPARTISANSHIP

Indicate your feelings about the following:

BIPARTISANSHIP IN FEDERAL GOVERNMENT



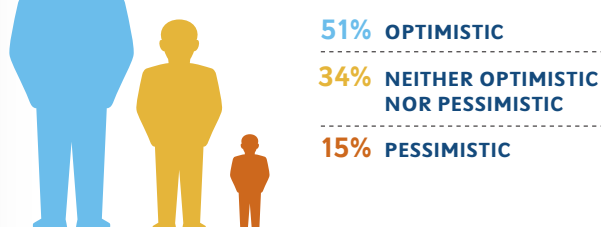
BIPARTISANSHIP IN STATE GOVERNMENT



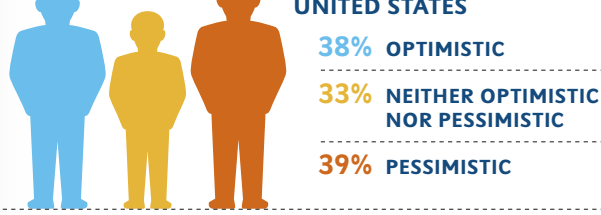
JOB GROWTH PROSPECTS FOR COMPANY AND COUNTRY

While more than half of SMBs report feeling optimistic about their own company's job growth, only 38% feel the same about overall U.S. job prospects.

Q1 2014 JOB GROWTH PROSPECTS FOR YOUR COMPANY



Q1 2014 JOB GROWTH PROSPECTS FOR THE UNITED STATES



HIRING DIFFICULTY

SMB leaders report ongoing challenges in finding and hiring qualified talent for open professional positions.



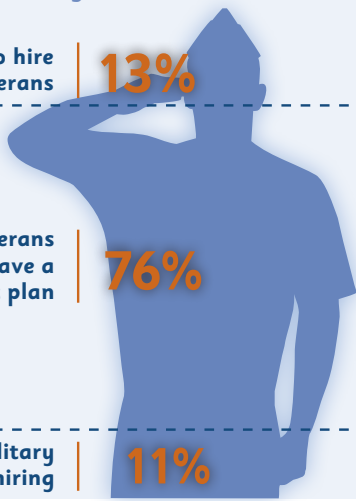
HIRING VETERANS

The majority of SMBs say they're amenable to hiring veterans, but only 13% have specific plans to do so in the coming months.

Specific plans to hire military veterans | **13%**

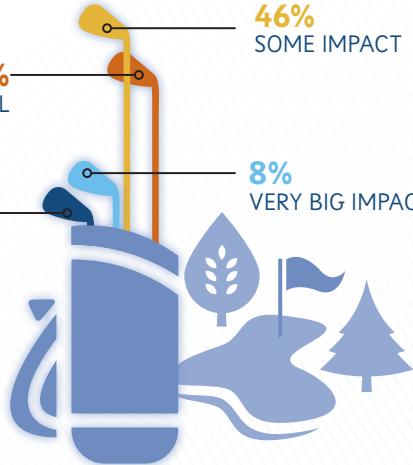
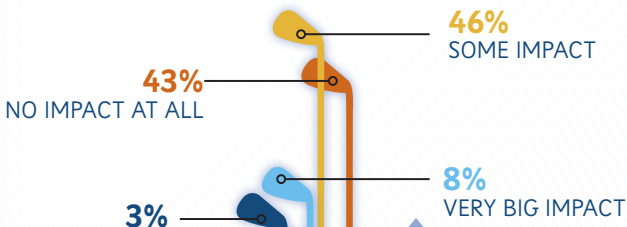
Hire military veterans but do not have a specific plan | **76%**

Will not target military veterans for hiring | **11%**



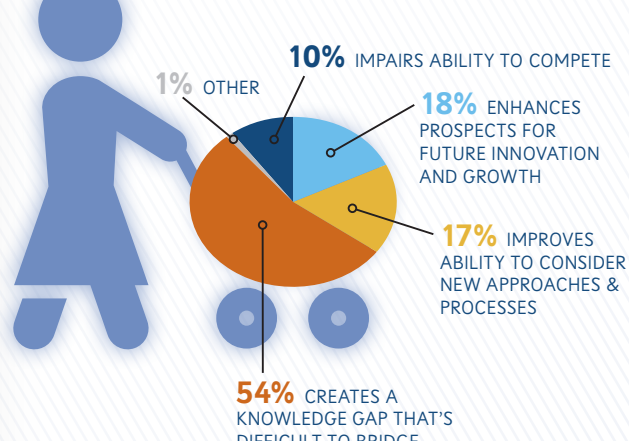
IMPACT OF RETIRING BABY BOOMERS

With 10,000 Baby Boomers retiring each day in the U.S., more than half of SMBs expect some level of business impact from retirements.



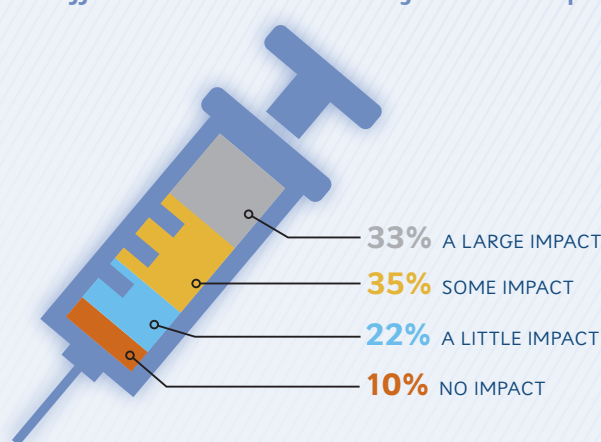
HOW RETIREMENT IMPACTS COMPANIES

SMBs report a mixture of both positive and negative business impact from Baby Boomer retirement.



IMPACT OF PATIENT PROTECTION AND AFFORDABLE CARE ACT

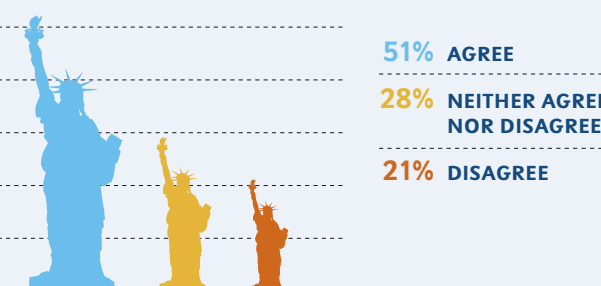
How much of an impact will the Patient Protection and Affordable Care Act have on your business plans?



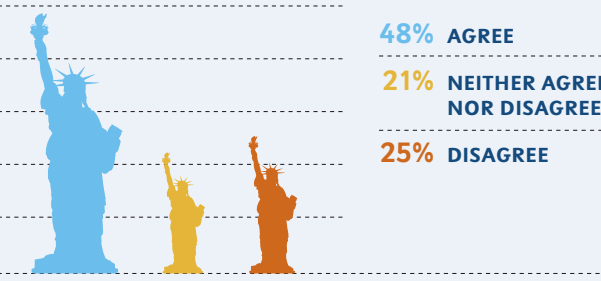
IMMIGRATION REFORM

How much do you agree or disagree with the following proposals for immigration reform?

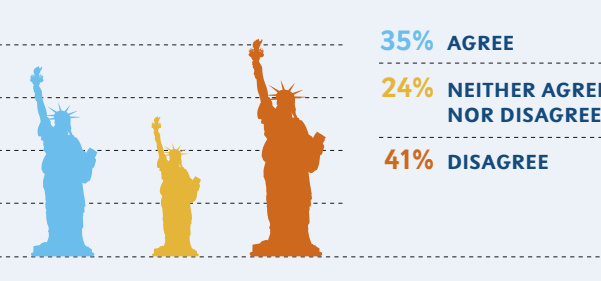
THE U.S. SHOULD EASE REQUIREMENTS FOR SKILLED WORKERS IN IT, SCIENCE AND OTHER HIGH-DEMAND FIELDS.



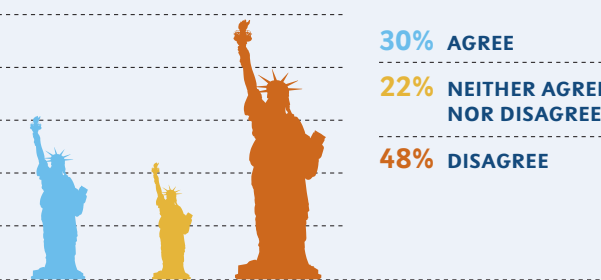
THE U.S. SHOULD EASE REQUIREMENTS FOR SKILLED LABORERS IN MANUFACTURING.



THE U.S. SHOULD EASE REQUIREMENTS ONLY FOR IMMIGRANTS WHO ARE ALREADY LIVING IN THE U.S.



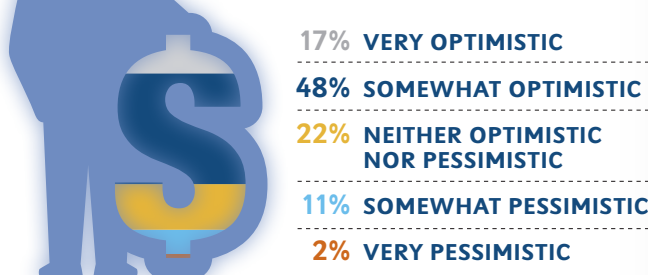
THE U.S. SHOULD EASE REQUIREMENTS FOR ALL IMMIGRANTS, NOW AND IN THE FUTURE.



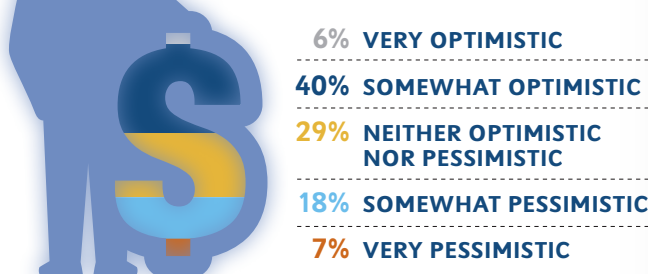
ECONOMIC PROSPECTS FOR COMPANY AND COUNTRY

Almost two-thirds of SMBs report an optimistic opinion on their own company's economic prospects, while only 46% feel the same toward the overall U.S. economy.

ECONOMIC PROSPECTS FOR YOUR COMPANY NEXT QUARTER

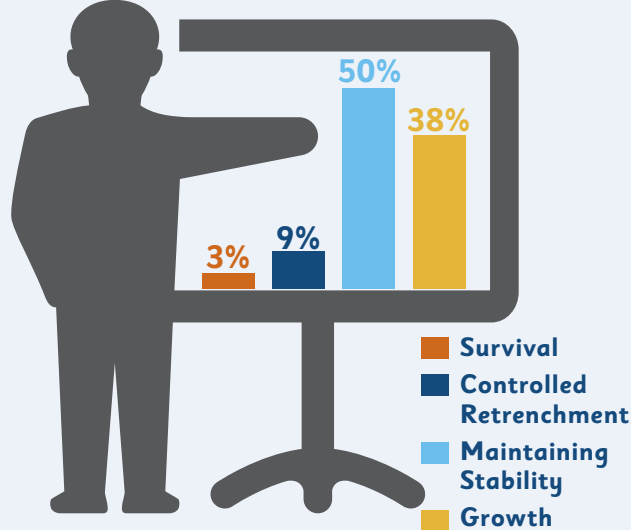


ECONOMIC PROSPECTS FOR THE U.S. NEXT QUARTER



HOW SMBs SEE THEMSELVES

The vast majority of responding SMBs report a position of maintaining stability or growth.



WORKFORCE RETIREMENT

The majority of SMBs expect retirement rates in the coming quarter to be less than 10% of their workforce.

