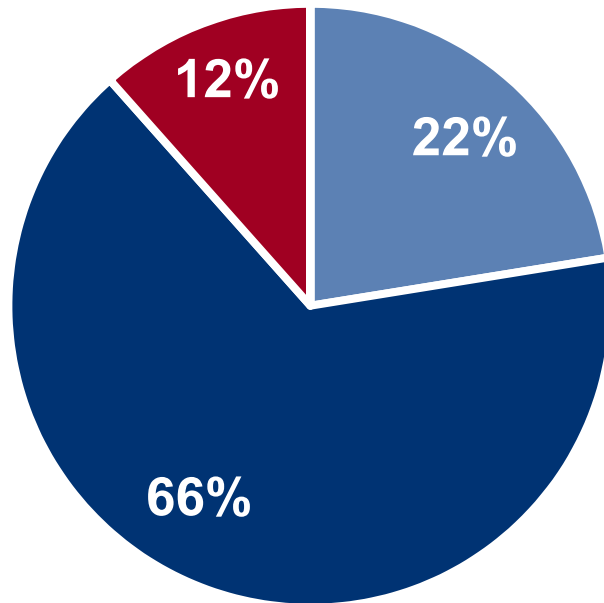


Quarterly Report: WisBusiness.com Tech Leaders Survey
Second Quarter 2009

Condition of State's Economy

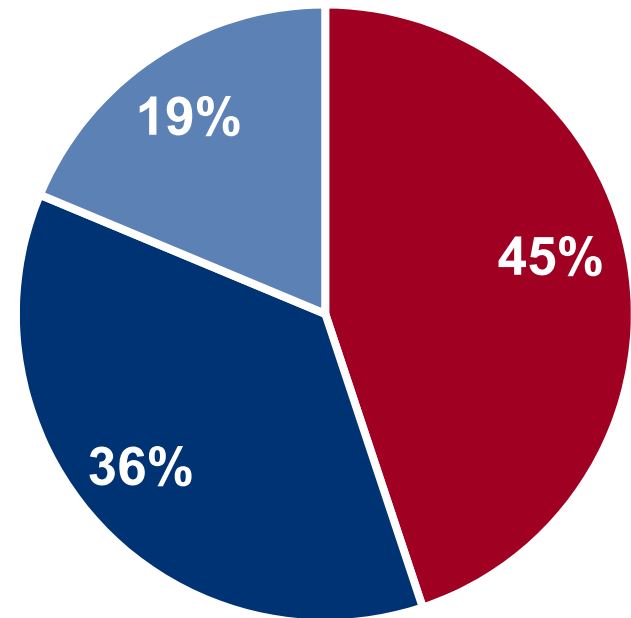
Sixty-six percent of survey respondents rated the current condition of Wisconsin's economy as fair, while 22.4 percent rated it as poor. Nearly 12 percent (11.6 percent) said the state's economy is good. Almost 45 percent of executives who responded to the survey believe the state's economy will improve during the next 12 months. Nineteen percent (18.7 percent) said the state's economy will get worse in the next year, while 36.4 percent believe economic conditions in Wisconsin will stay the same during that period.

Current Condition of State's Economy



■ Poor ■ Only Fair ■ Good ■ Excellent

State's Economy Next 12 Months



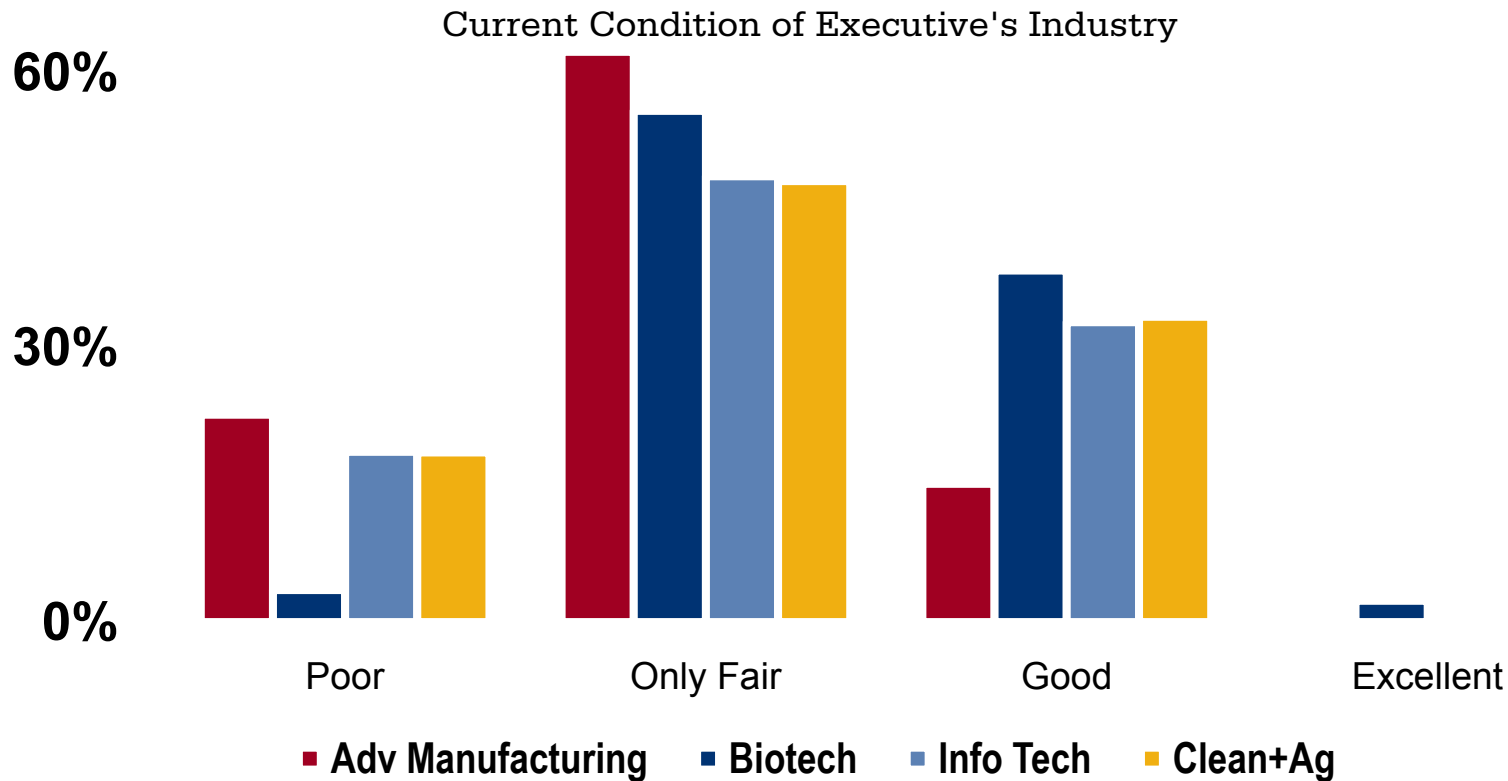
■ Get Better ■ Stay the Same ■ Get Worse

Industry Condition

Executives in Wisconsin's advanced manufacturing sector who responded to the survey rate the condition of their industry as worse than executives in the other three sectors do. Two-thirds (62.3 percent) of advanced manufacturing executives rated the condition of that industry as only fair. Another 22.6 percent rated the industry's condition as poor.

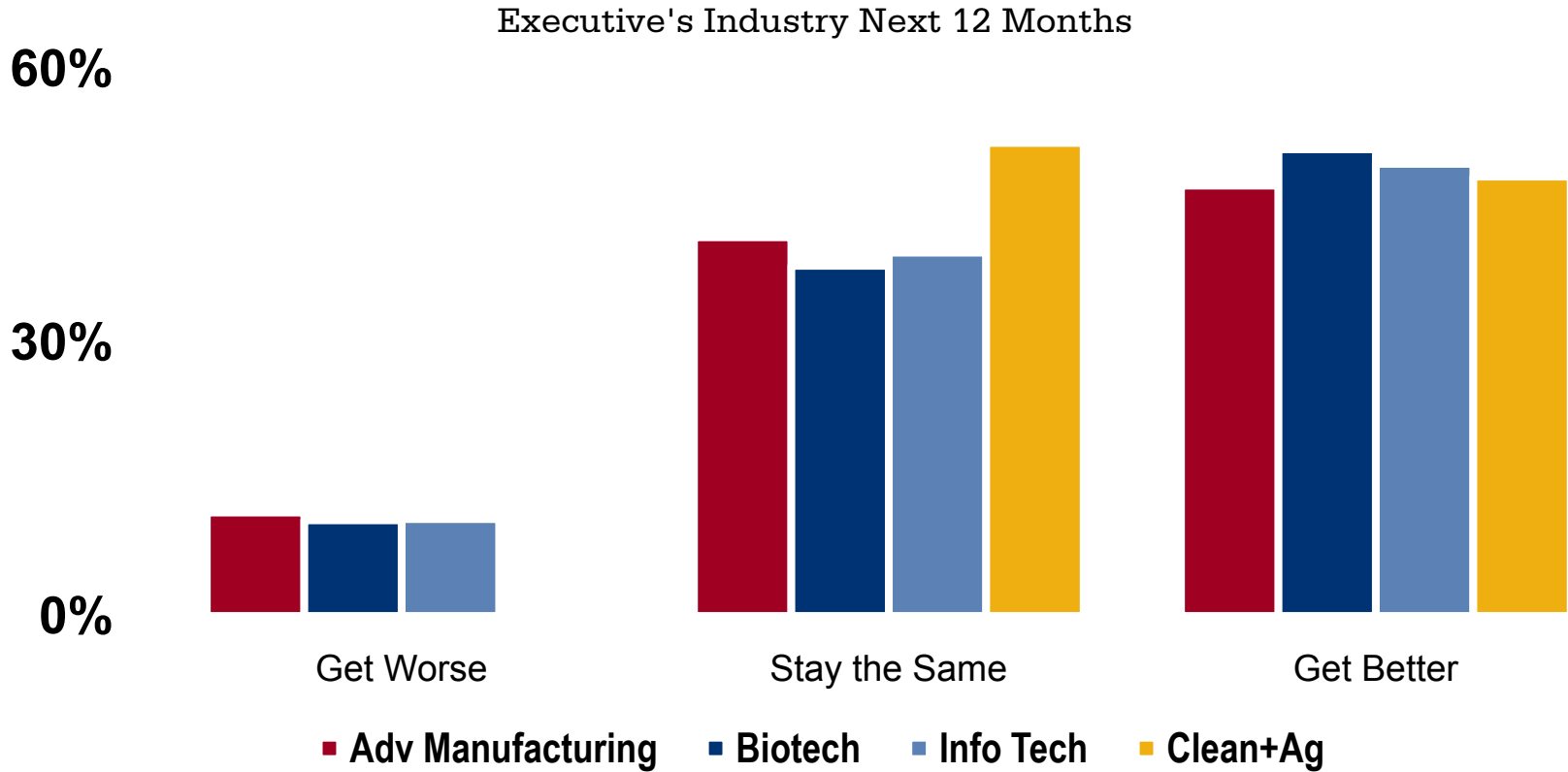
Biotechnology and medical device company executives feel better about the condition of their industry than do executives in the other sectors. While 59.3 percent of biotech executives who responded to the survey said the condition of the state's biotechnology and medical device industry is only fair (55.8 percent) or poor (3.5 percent), nearly 40 percent (38.4 percent) believe the condition of their industry is good.

Executives in the information technology, and clean technology and agricultural biotechnology industries who responded to the survey rated the conditions of their respective sectors nearly the same. Roughly one-third rated the condition of their industry as good; approximately half rated it as only fair and the balance rated it poor.



Industry Condition (Continued)

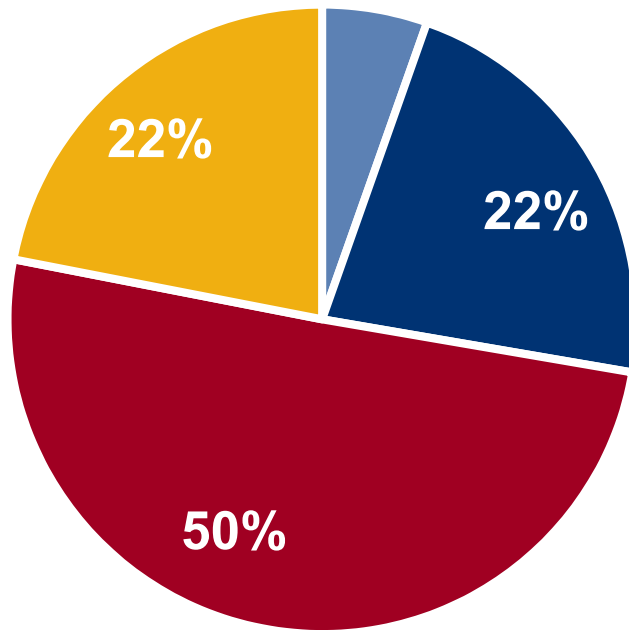
There was little difference across the four industries in perceptions of whether the condition of each will get better, stay the same or get worse during the next 12 months. Executives in the clean tech and ag-bio industry who responded to the survey, however, expressed more optimism about its future than their colleagues in the other three sectors. Of those clean tech and ag-bio executives who responded to the survey, 100 percent believe their industry will stay the same (51.9 percent) or get better (48.1 percent). While about half of executives in the advanced manufacturing, biotechnology and medical device, and information technology sectors believe the condition of their industries will improve during the next year, roughly 10 percent of those executives believe the condition of their industry will get worse in the next 12 months.



Company Prospects

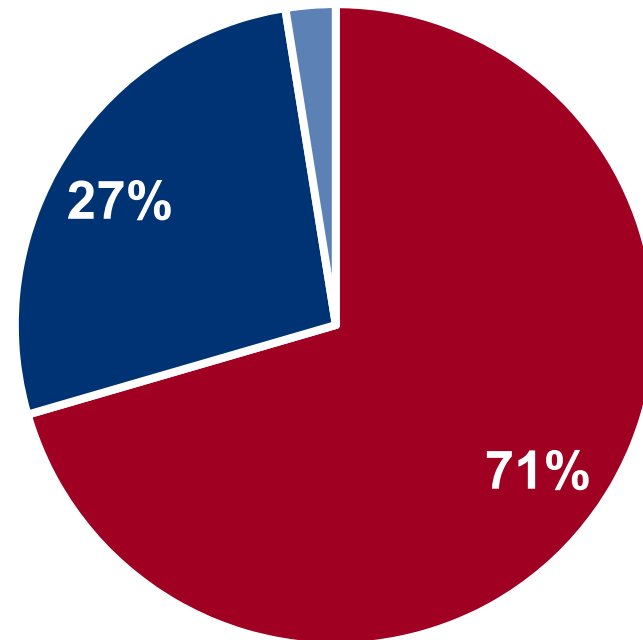
Executives who responded to the survey are most optimistic about the prospects for the company they run. Nearly three-quarters of the executives rate the overall prospects for their own companies as good (50.4 percent) or excellent (21.9 percent). Twenty-two percent rate those prospects as only fair and 5 percent rate them as poor. Seventy percent of survey respondents said that things will get better for his or her company during the next 12 months. More than a quarter (27.0 percent) believes things will stay the same for their company in the next year. Only 2.5 percent believe things will get worse.

Company's Prospects Today



■ Poor ■ Only Fair ■ Good ■ Excellent

Company's Prospects Next 12 Months



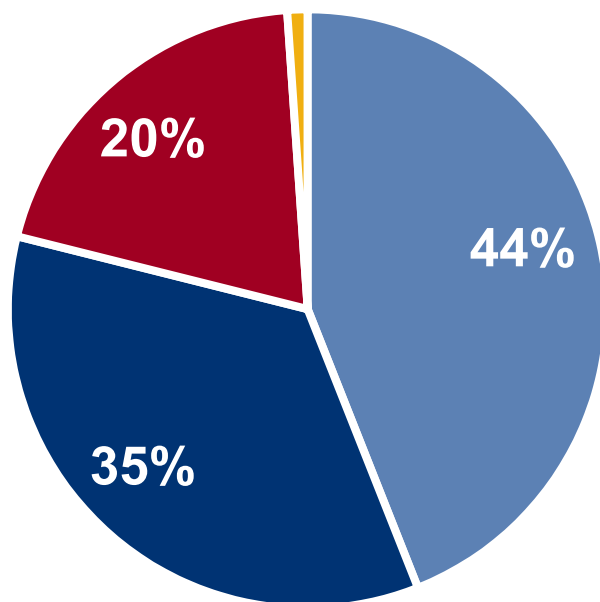
■ Get Better ■ Stay the Same ■ Get Worse

Availability of Capital

Almost 80 percent of those tech sector leaders who responded to the survey rate the availability of capital as only fair (34.1 percent) or poor (44.0 percent). Twenty percent rated capital availability as good; 1 percent rated it as excellent. Biotechnology and medical device executives view the capital markets least favorably, as half (50.6 percent) of biotech executives who responded to the survey rated the availability of capital as poor. Information technology executives view capital availability most favorably, with more than a quarter (26.2 percent) of info tech industry respondents rating it as good.

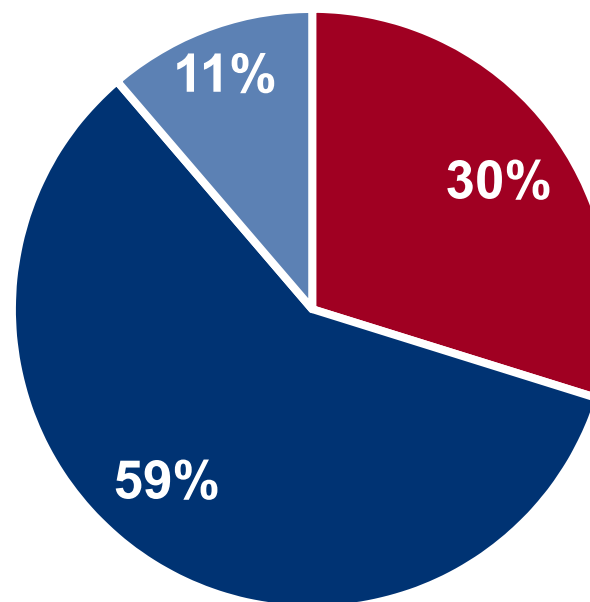
Nearly 60 percent (58.9 percent) of survey respondents believe that the availability of capital will stay the same during the next year. Thirty percent (29.8 percent) believe it will get better and more than 10 percent (11.3 percent) believe it will get worse in the next 12 months. There was little difference between industries in perceptions among survey respondents of whether capital availability will get better or worse in the coming year.

Availability of Capital Today



■ Poor ■ Only Fair ■ Good ■ Excellent

Capital Availability Next 12 Months



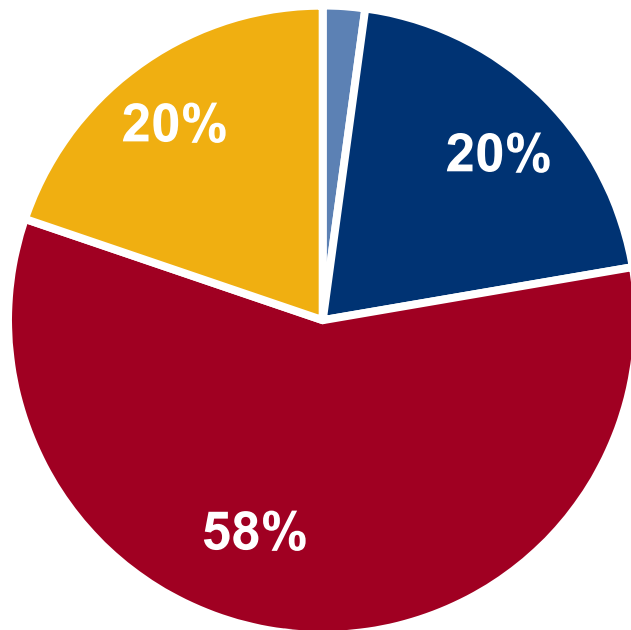
■ Get Better ■ Stay the Same ■ Get Worse

Current Labor Market

Nearly 60 percent (57.9 percent) of technology industry executives who responded to the survey rated as good the ability of the current labor market to meet the personnel needs of their own companies. Almost 20 percent (19.8 percent) said the ability of the current labor market to meet those needs was excellent. Twenty-two percent of survey respondents rated the current labor market as only fair (20.1 percent) or poor (2.2 percent). Biotechnology and medical device executives view the current labor market most favorably, with nearly half (48.2 percent) of those who responded to the survey rating the ability of the current labor market to fill the personnel needs as good. Information technology executives view the current labor market least favorably, as more than 5 percent (5.5 percent) of respondents from that industry rating it as poor.

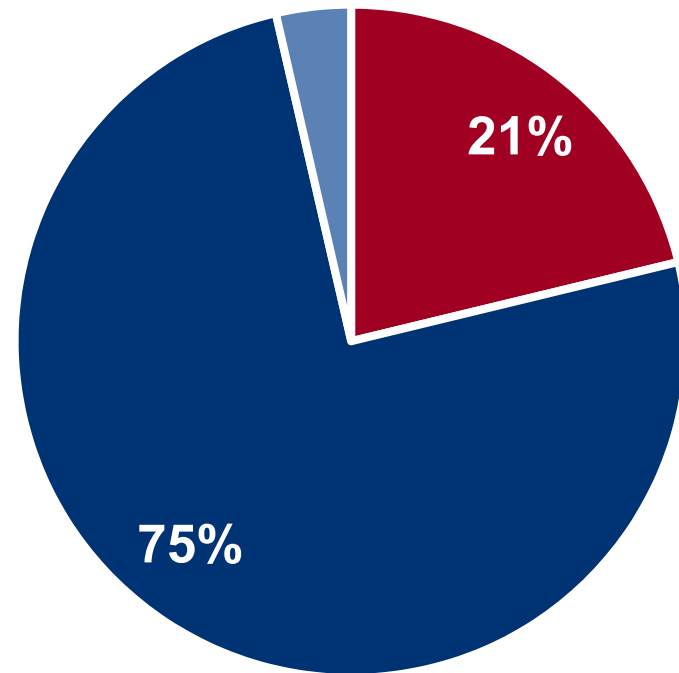
Seventy-five percent (75.2 percent) of executives who responded to the survey believe the ability of the current labor market to fill their company's personnel needs will stay the same during the next 12 months. Twenty-one percent (21.2 percent) said it would get better and almost 4 percent (3.6 percent) believe the labor market will get worse in the next year.

Condition of Current Labor Market



■ Poor ■ Only Fair ■ Good ■ Excellent

Labor Market Next 12 Months



■ Get Better ■ Stay the Same ■ Get Worse

About the WisBusiness.com Tech Leaders Survey

The WisBusiness.com Tech Leaders Survey is a quarterly, statewide survey of senior executives in the information technology, biotechnology and medical device, advanced manufacturing, and clean technology and agricultural biotechnology industries. The survey is a project of the Wisconsin Technology Council, WisBusiness.com and the Luminis Group, Ltd. The survey questionnaire is administered by e-mail and Web-based survey technology. This quarter's survey was fielded from June 23-July 6, 2009 ($n=277$, 29.5 percent response rate). Respondents represent a geographic, developmental and disciplinary cross-section of the state's technology industry. The survey is conducted by the Luminis Group, Ltd., Madison, Wis., using generally accepted methodology, including non-biased question wording and order, response category randomization, where appropriate, and uncompensated respondent participation.



Tom Still
tstill@wisconsintechcouncil.com
608-442-7557



Rod Hise
rod@luminisgroup.com
608-770-7850



Jeff Mayers
mayers@wispolitics.com
608-441-8418