

**Deloitte.**

# Economic Stimulus Program Survey

November 2009

# About the Survey

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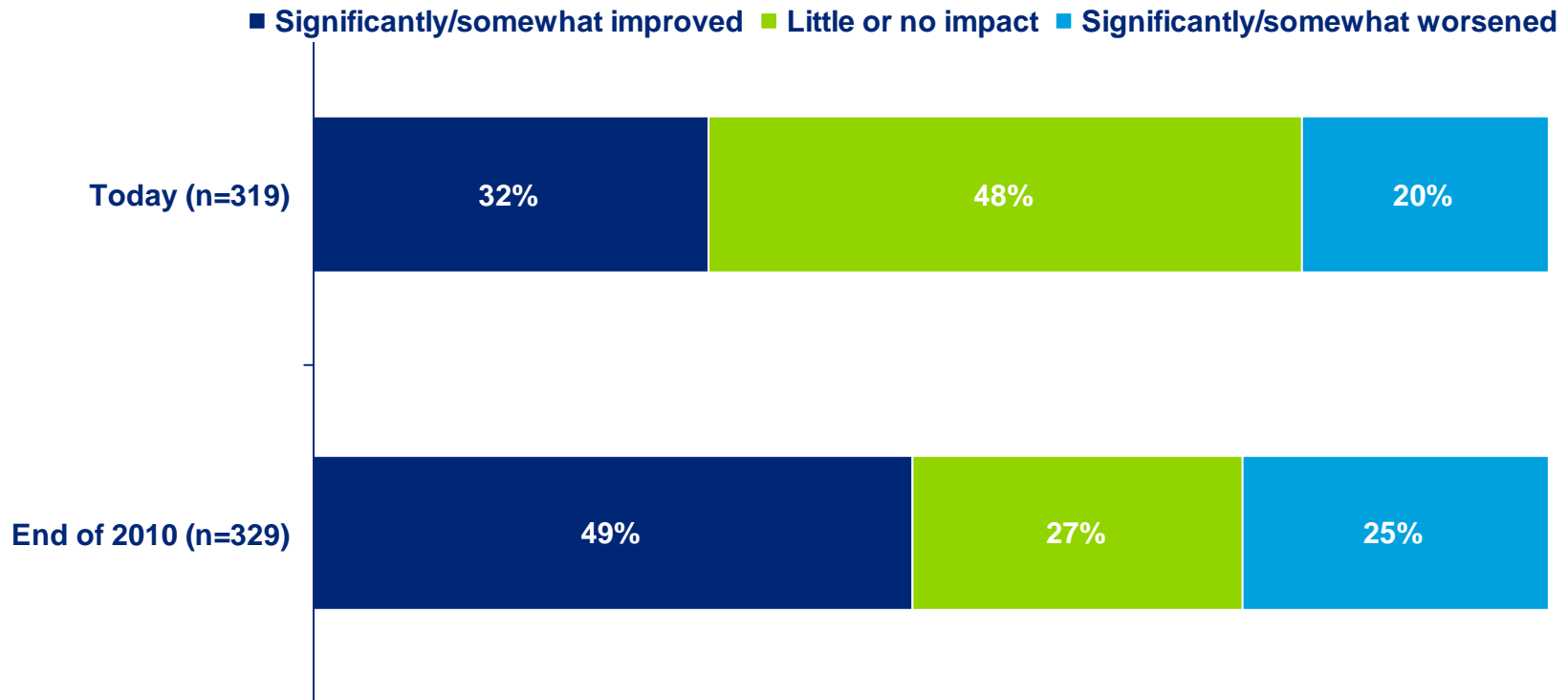
- Deloitte contracted Bayer Consulting to conduct a survey to help assess the business community's views on the American Reinvestment and Recovery Act of 2009 (herein referred to as the "Economic Stimulus Program") and its provisions designed to increase transparency and prevent fraud.
- The survey was conducted online from September 10 to October 12, 2009, and garnered 343 responses. In the following slides, the number of respondents who answered each question is provided in the format "n=(number of respondents)".
- The responses were aggregated for the purpose of analysis, and individual responses have been kept confidential.
- Survey participants came from companies across a broad range of industries, including manufacturing (21%), financial services (17%), and technology/telecommunications (12%).
- Regarding company size, 32% had annual revenues of less than \$100 million, 34% had \$100 million to less than \$1 billion, and 34% had \$1 billion or more.



# Survey results

# Q1: How do you think the Economic Stimulus Program has affected economic conditions today and how do you think it will affect economic conditions by the end of 2010?

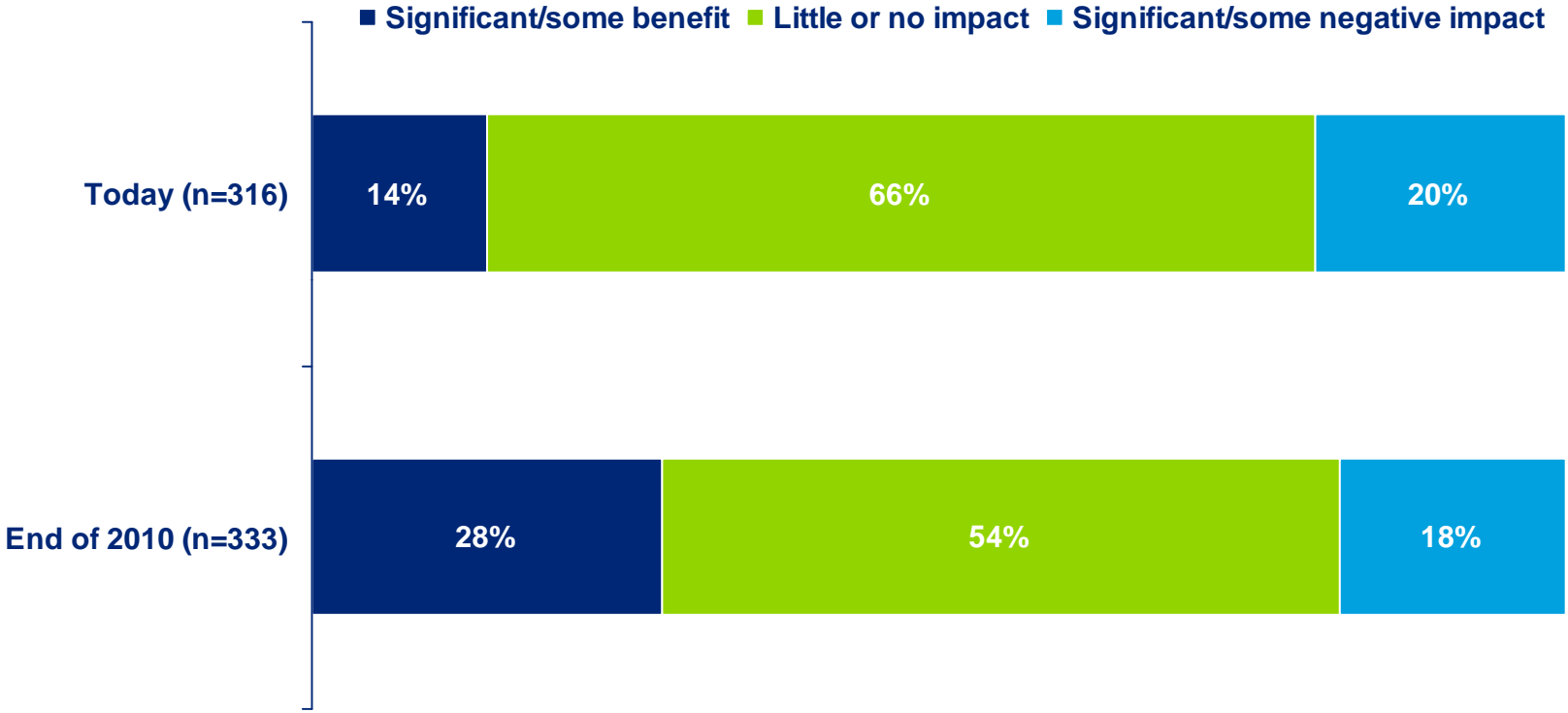
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Note: Percentages do not total to 100% due to rounding.

**Q2: How do you think the Economic Stimulus Program has affected **your company today** and how do you think it will affect your company by the end of 2010?**

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**Q3:** The size of the Economic Stimulus Program was \$787 billion. Based on what you know today, do you think the Economic Stimulus Program should have been smaller, been larger, or was it about the right size? (n=341)

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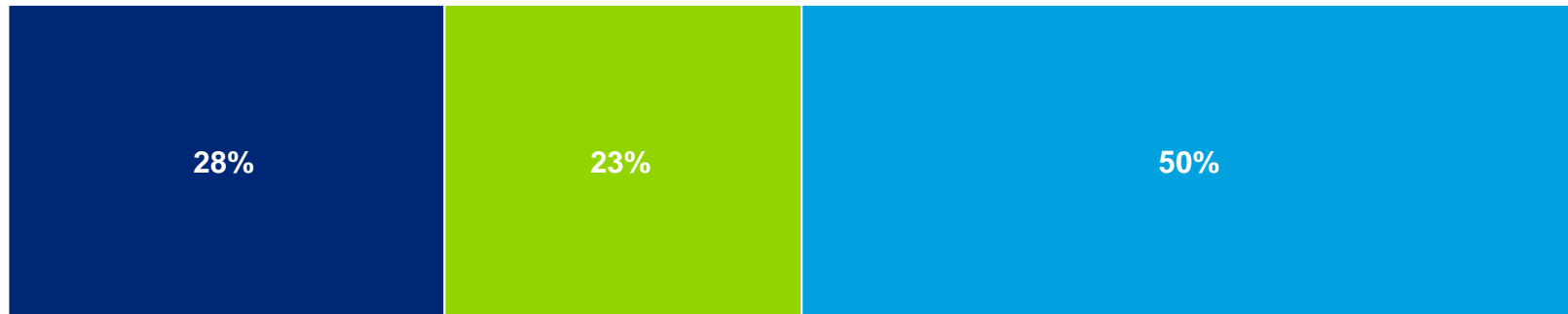
■ Should have been smaller ■ About the right size ■ Should have been larger



**Q4:** Outlays from the Economic Stimulus Program are expected to be \$120 billion in 2009, \$219 billion in 2010, \$126 billion in 2011, and \$110 billion in subsequent years. Based on what you know today, do you think the Economic Stimulus Program should have been designed to spend funds more slowly, more quickly, or is it spending at about the right pace? (n=338)

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■ Should spend more slowly ■ About the right pace ■ Should spend more quickly



**Q5:** How likely do you think it is that the United States will need additional economic stimulus funding in the next 1 to 2 years, beyond the 2009 Economic Stimulus Program? (n=318)

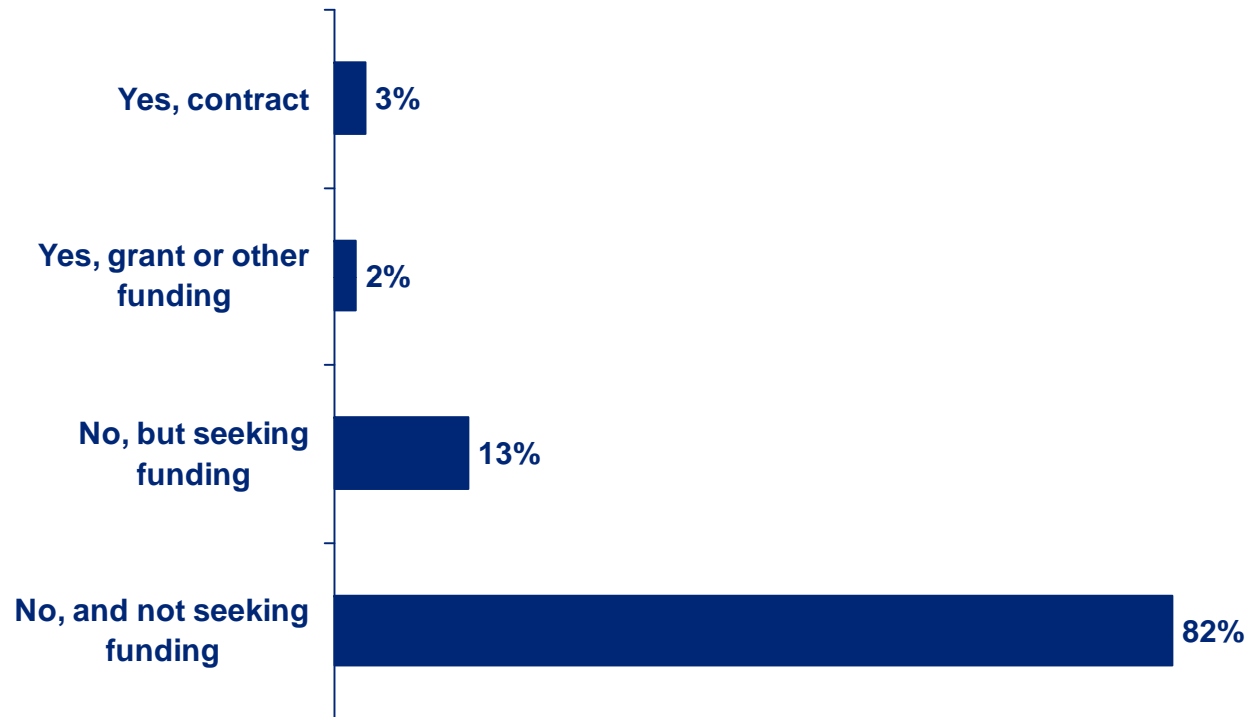
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■ Not at all/not very likely ■ Somewhat likely ■ Extremely/very likely



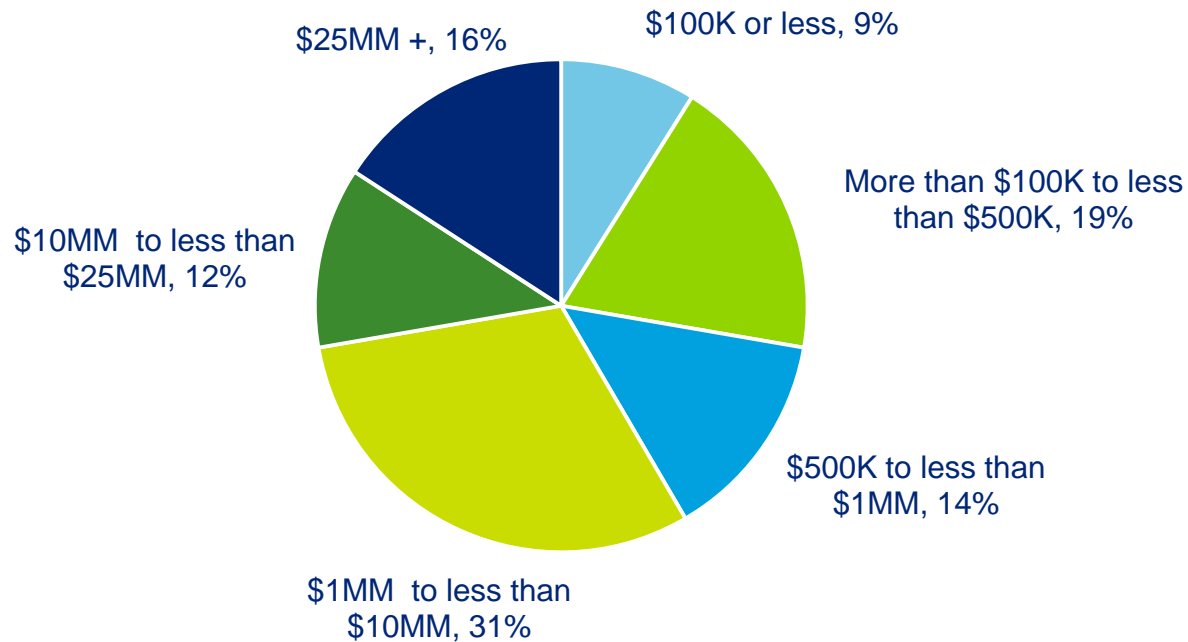
**Q6:** Has your company received funding from the Economic Stimulus Program? (If your company has received more than one type of funding, please choose all that apply.) (n=343)

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**Q7:** What is the amount of the contract or grant your company has, or is seeking, under the Economic Stimulus Program? If your company has or is seeking more than one contract or grant, please provide the amount of the largest one.

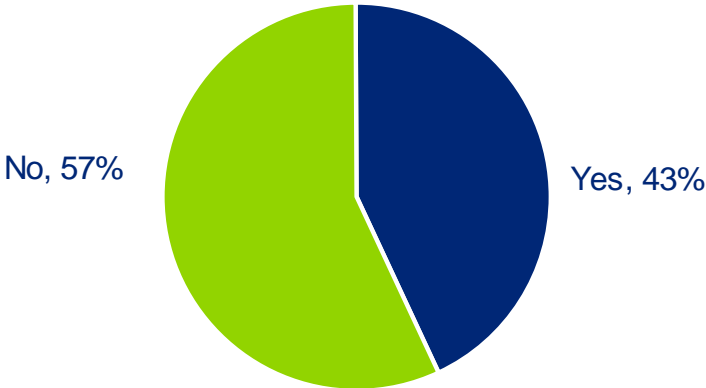
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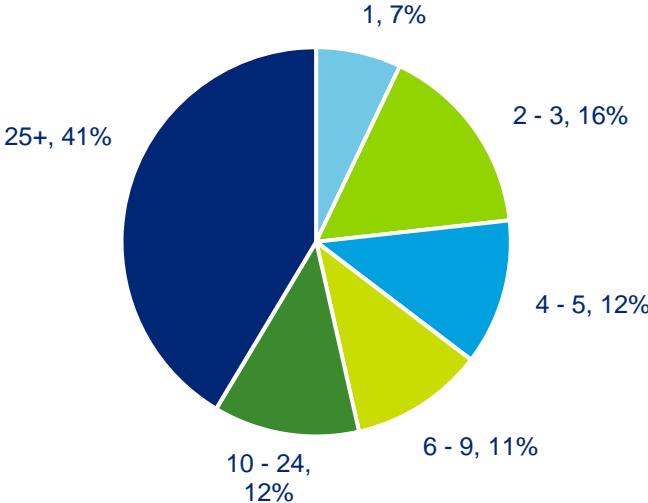
Base=Respondents at Companies that have Received, or are Seeking, Funding (n=58)

# Other Government Contracts or Grants

**Q8:** Aside from any contracts or grants it may have under the Economic Stimulus Program, has your company had other contracts or grants with federal, state, or local governments during the last 3 years? (n=291)



**Q9:** Aside from any contracts or grants under the Economic Stimulus Program, how many contracts or grants has your company had with federal, state, or local governments over the last 3 years? (n=122)



**Q10:** How familiar are you with the requirements of the Economic Stimulus Program designed to increase transparency and prevent fraud? (n=343)

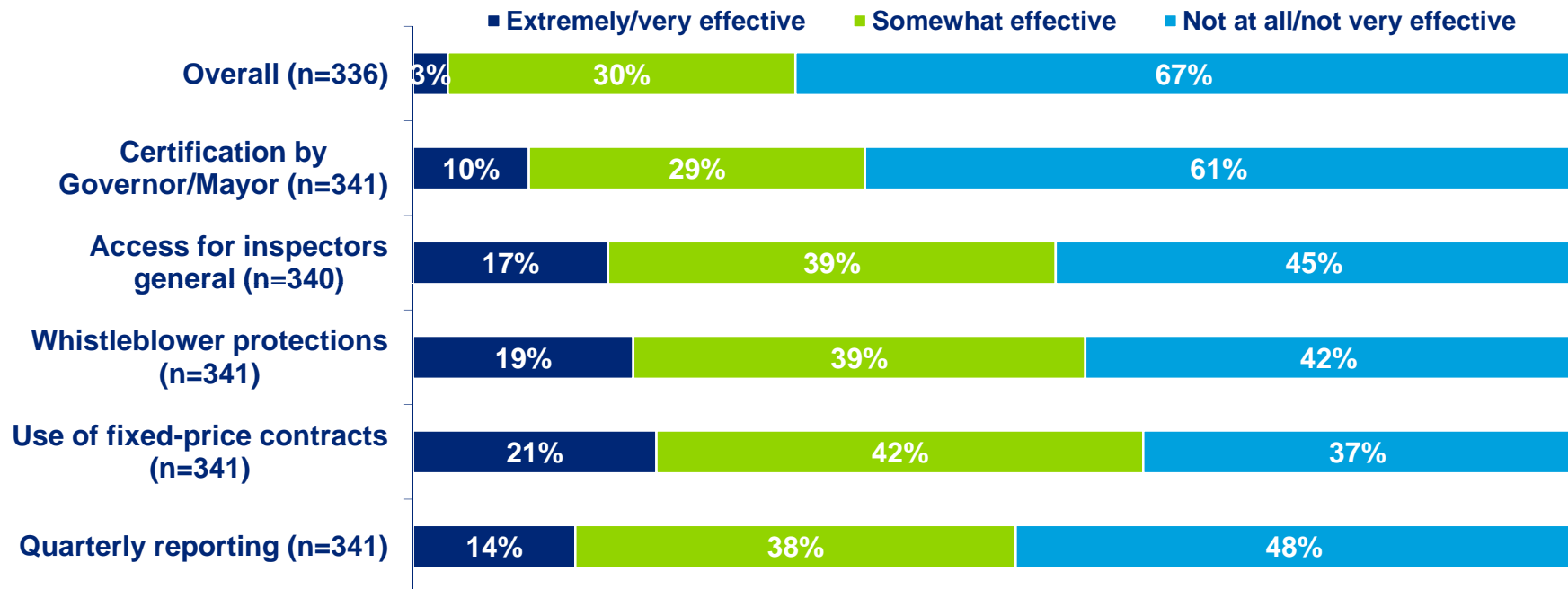
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■ Not Familiar ■ Somewhat Familiar ■ Very Familiar



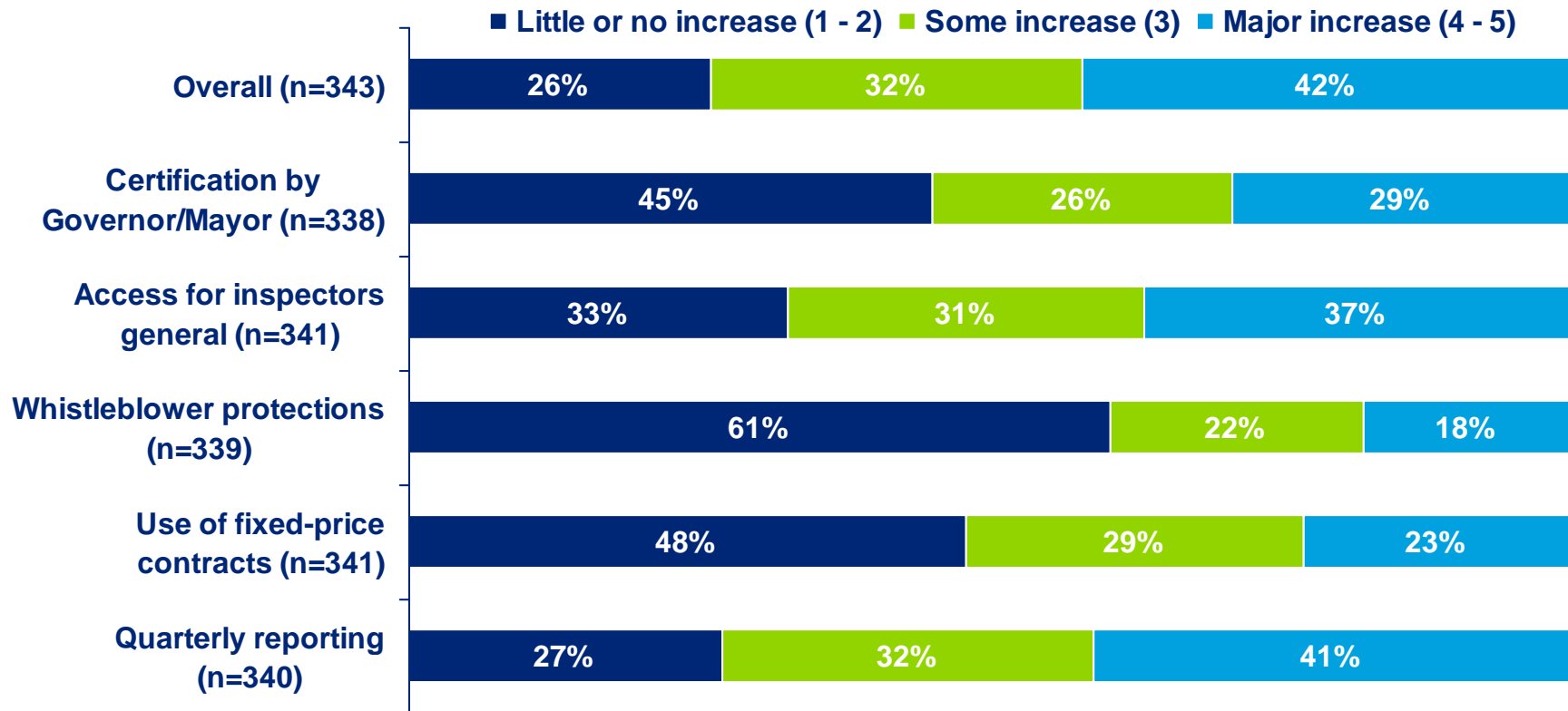
**Q11:** Overall, how effective do you believe the requirements of the Economic Stimulus Program will be in increasing transparency and preventing fraud?

**Q12:** How effective do you believe each of the following specific requirements of the Economic Stimulus Program will be in increasing transparency and preventing fraud?



**Q13:** Please rate the extent to which you think the requirements of the Economic Stimulus Program that are designed to increase transparency and prevent fraud will **increase the cost** of the projects funded under the program.

**Q14:** Please rate the extent to which you think each of the following specific requirements in the Economic Stimulus Program that are designed to increase transparency and prevent fraud will **increase the cost** of the projects funded under the program.



Note: Answer choices were a 1-5 scale, with 1 indicating "little or no increase," and 5 indicating "major increase."

**Q15:** Do you think that the requirements in the Economic Stimulus Program that are designed to increase transparency and prevent fraud are less difficult or more difficult to comply with compared to requirements in these areas in your company's other government contracts?

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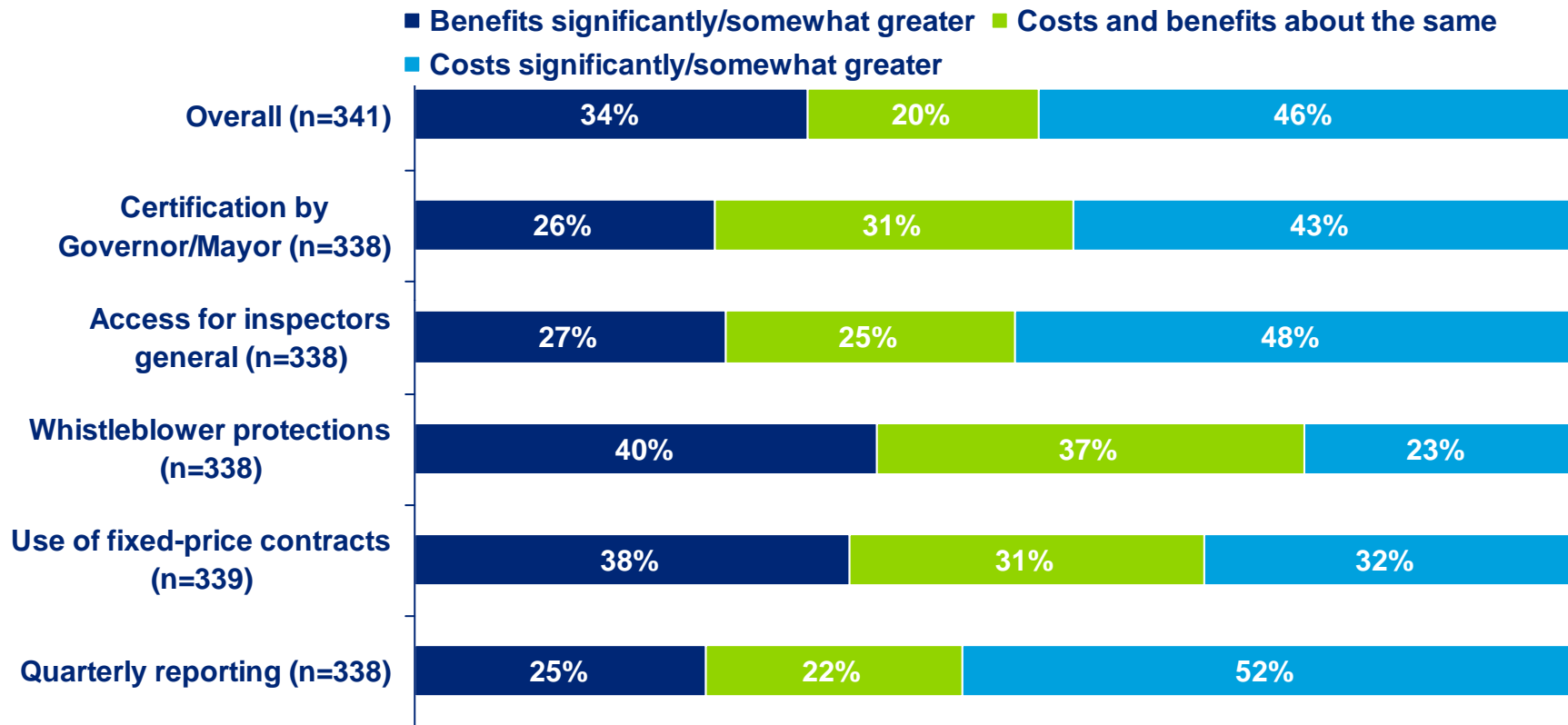
■ Much/somewhat less difficult ■ About the same ■ Much/somewhat more difficult



Base=Respondents at Companies that have Received or are Seeking Economic Stimulus Funding and have also had Other Government Contracts over Last Three Years (n=33)

**Q16:** In the Economic Stimulus Program, do you think that the benefits of the requirements designed to increase transparency and prevent fraud are greater than the potential costs — in spending funds less efficiently and more slowly — or that the potential costs are greater than the benefits?

**Q17:** In the Economic Stimulus Program, do you think that the benefits of the following specific requirements designed to increase transparency and prevent fraud are greater than the potential costs — in spending funds less efficiently and more slowly — or that the potential costs are greater than the benefits?



**Q18:** How much do you think that the requirements in the Economic Stimulus Program that are designed to increase transparency and prevent fraud will lead to an increase in the number of reports of potential instances of fraud? (n=342)

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■ Little or no increase (1 - 2) ■ Some increase (3) ■ Major increase (4 - 5)

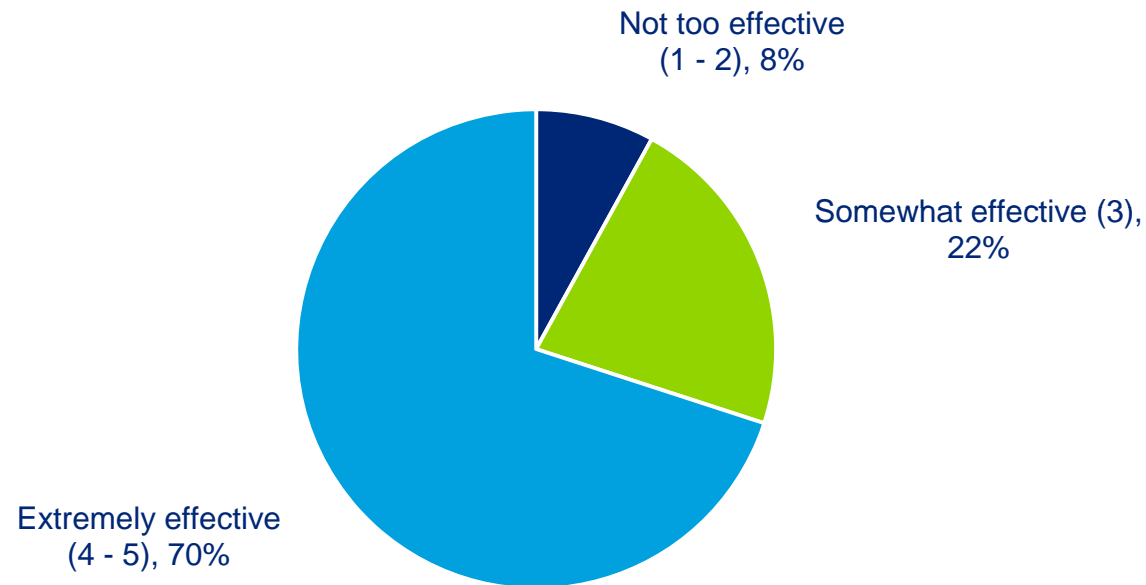


Note: Answer choices were a 1-5 scale, with 1 indicating "little or no increase," and 5 indicating "major increase."

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**Q19:** Thinking about **all** your company's business activities, both those involving government and those involving private customers and service providers, how effective do you think your company is in detecting and preventing fraud? (n=340)

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Note: Answer choices were a 1-5 scale, with 1 indicating "not too effective," and 5 indicating "extremely effective."

The slide features a light blue background with several dark blue puzzle pieces scattered across it. The text 'Participant profile' is centered in a white serif font.

# Participant profile

## Q20: Which of the following industries best describes your firm's primary activity? (n=343)

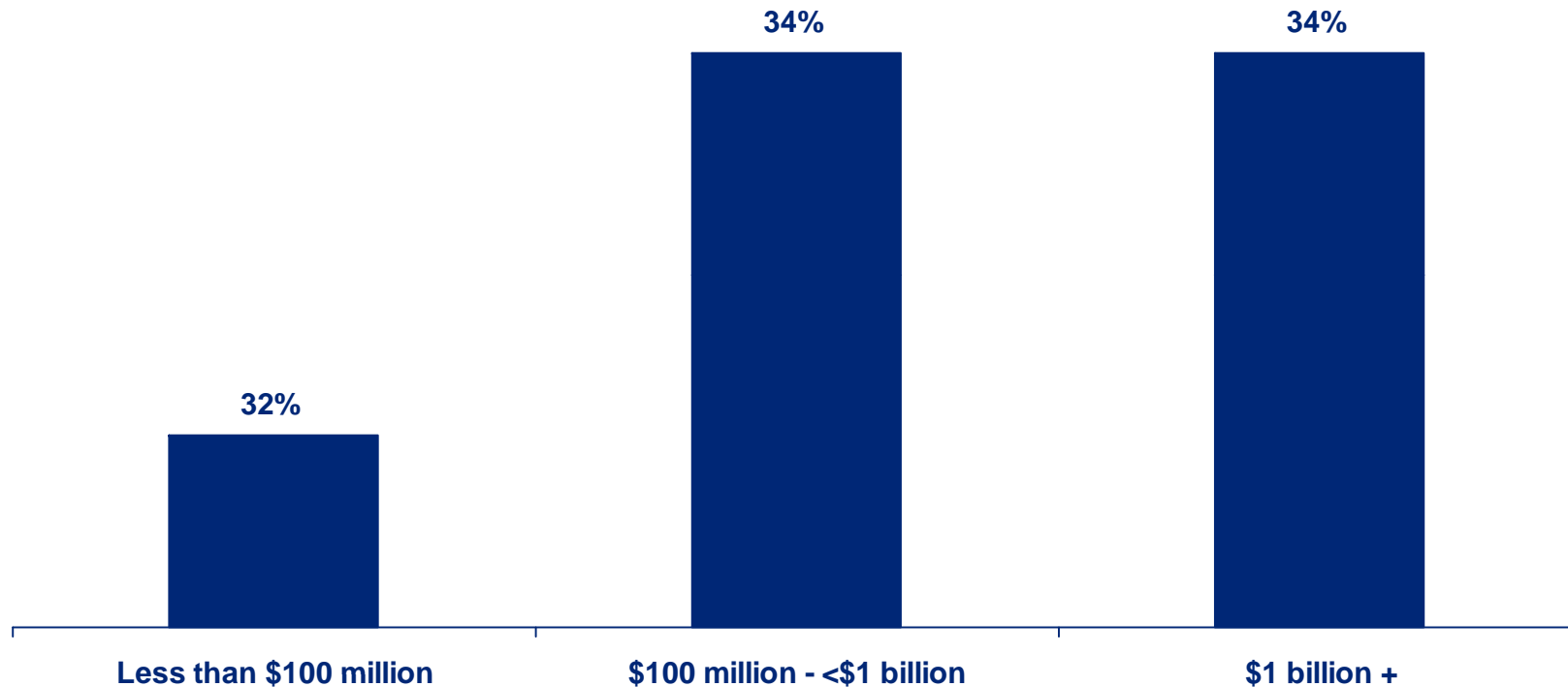
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Financial Services	17%
Manufacturing — Non-Consumer	15%
Technology/Telecommunications	12%
Energy & Resources	8%
Life Sciences & Health Care	7%
Manufacturing — Consumer Products	6%
Media & Entertainment	4%
Retail	3%
Real Estate	2%
Transportation	2%
Other	25%

Note: Percentages do not total to 100% due to rounding.

**Q21:** Which of the following ranges includes your firm's total annual revenues in its last fiscal year? (n=339)

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**Q22:** Which of the following best describes your primary job responsibility?  
(Please choose one.) (n=331)

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General management	29%
Finance	24%
Compliance	15%
Strategic Planning	5%
Legal	4%
Risk Management	4%
Audit/Internal Audit	3%
Purchasing/Contracting	2%
Other	14%

Note: Percentages do not total to 100% due to rounding.

**Q23:** Which of the following best describes your title or level? (Please choose one.) (n=292)

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CEO/President	14%
CFO	4%
COO	2%
EVP/SVP	5%
VP	12%
Director	21%
Manager	26%
Other	15%

Note: Percentages do not total to 100% due to rounding.

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