

Conducted by the:



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and The Greater Springfield Chamber of Commerce

Methodology

The Sangamon County Economic Outlook Survey is a multi-mode survey (mail and phone) examining the economic perceptions, expectations, and evaluations of Sangamon County businesses, public, and non-profit organizations. The survey has been conducted biannually (March and September) since 2008¹ with the goal of providing a longitudinal analysis of the local economy through the lens of area organizations. The original sample included all known businesses/firms/organizations in Sangamon County provided by the Greater Springfield Chamber of Commerce in the fall of 2007. The Fall 2014 sample was updated by the Survey Research Office in August 2014.

The final sample included 1198 Sangamon County organizations representing the private sector, the non-profit sector, and the public sector. A printed questionnaire and letter requesting participation in the study were sent to these individual businesses and non-profit organizations on August 28th, 2014, with follow-up phone interviews on September 5th, 2014. The second wave of surveys were sent on September 12th and the survey was closed on September 19th. The survey also included a web option. Respondents were required to enter their unique project ID number to complete the web version in order to eliminate duplicate responses. The Fall 2014 results are from 207 respondents. The overall survey has a 20.8% response rate and represents fourteen different economic sectors.

For more information about this survey, please contact Dr. Ashley Kirzinger at akirz2@uis.edu or (217) 206-6591. Special thanks to Richard Schuldt, Dr. Beverly Bunch, Dr. Patricia Byrnes at the University of Illinois Springfield, and Paul Marsh at the Greater Springfield Chamber of Commerce for their guidance on this project.

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Intensity Index Scores

The “Intensity Index Score” is developed using the economic indicator questions, which have consistently appeared in every Outlook Survey. The score is the average of all ratings when the following values are assigned to each response: large decline (-100), small decline (-50), stay the same (0), small increase (+50), and large increase (+100). The Intensity Index score measures the expected change in each of the economic factors over the next 12 months.

¹ The only exception being September 2011.

Table 1. Business demographics of respondents

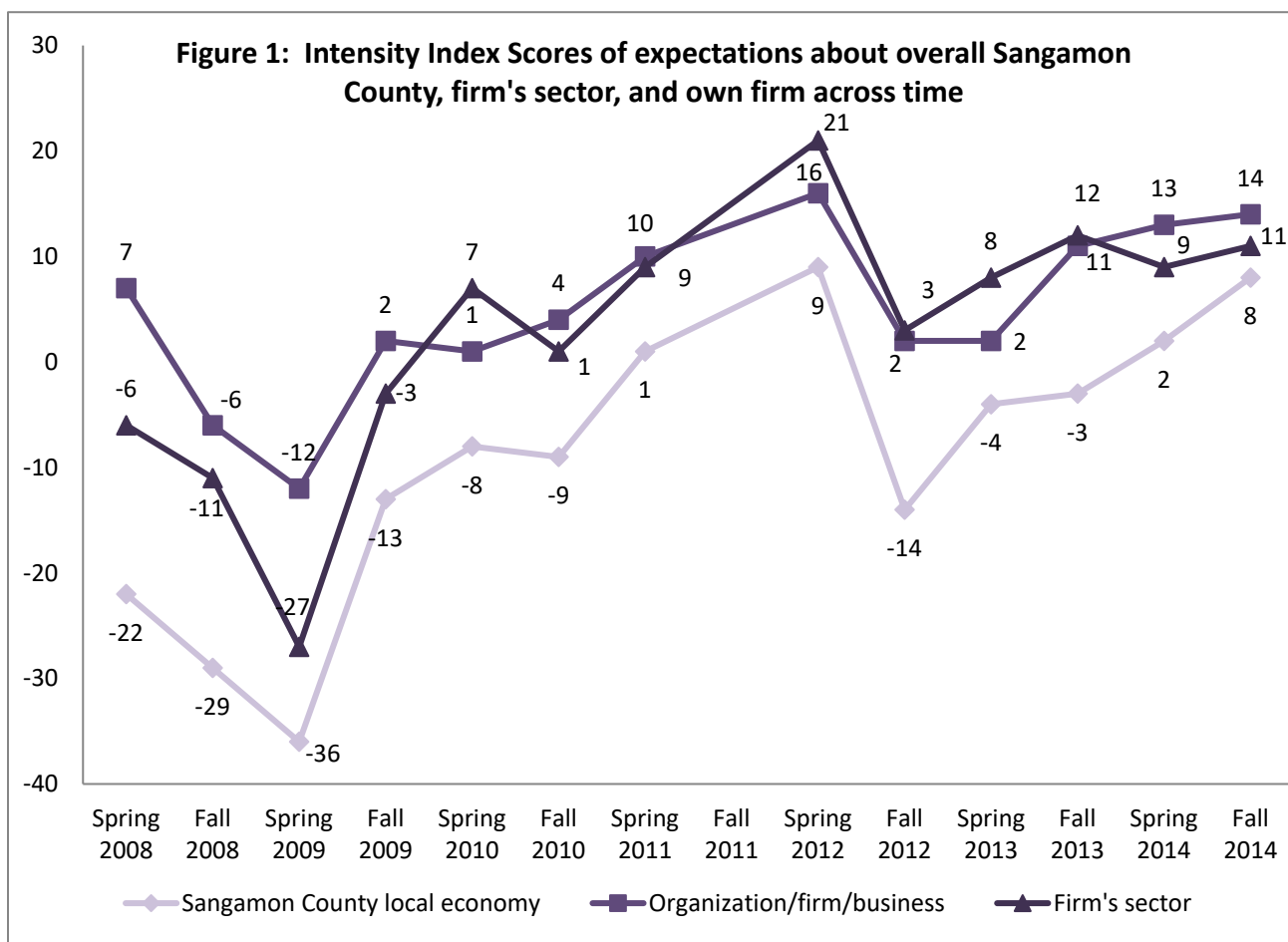
	Responses	Valid frequency
Sector		
Private sector (for-profit)	133	65.5%
Non-profit sector	35	17.2%
Public sector (government)	35	17.2%
Primary Economic Activity²		
Construction	21	10.1%
Manufacturing	9	4.3%
Wholesale trade	4	1.9%
Retail trade	35	16.9%
Transportation/ warehousing	6	2.9%
Finance/ insurance/ real estate	20	9.7%
Medical/ health care	12	5.8%
Education/ educational services	13	6.3%
Accommodations/ food/ entertainment/ recreation	18	8.7%
Information and communications systems	5	2.4%
Business and professional support services	26	12.6%
Personal services	17	8.2%
Natural resources and mining	1	0.5%
Public administration	20	9.7%
Unidentified	0	0%
Years in operation		
Median number of years in current location	197	23 years
Median number of years in Sangamon County	193	37 years
Median number of years in Illinois	194	40 years
Number of employees		
Less than five employees	27	13.5%
Five to ten employees	45	22.5%
11-20 employees	50	25.0%
21-35 employees	26	13.0%
36-50 employees	13	6.5%
51- 100 employees	16	8.0%
101-200 employees	17	8.5%
More than 200 employees	6	3.0%

² The Fall 2014 survey is the third time that we input data for respondents who did not identify their primary economic activity. Missing cases were matched with their classifications provided by DUNS data and checked by researchers. Evaluations of own sector were compared between those who provided their classification as well as the new inputted data for those who did not and no differences were found (both *IIS* were +11), therefore we relied on the inputted dataset in order to increase the number of respondents included in the analysis.

Executive Summary

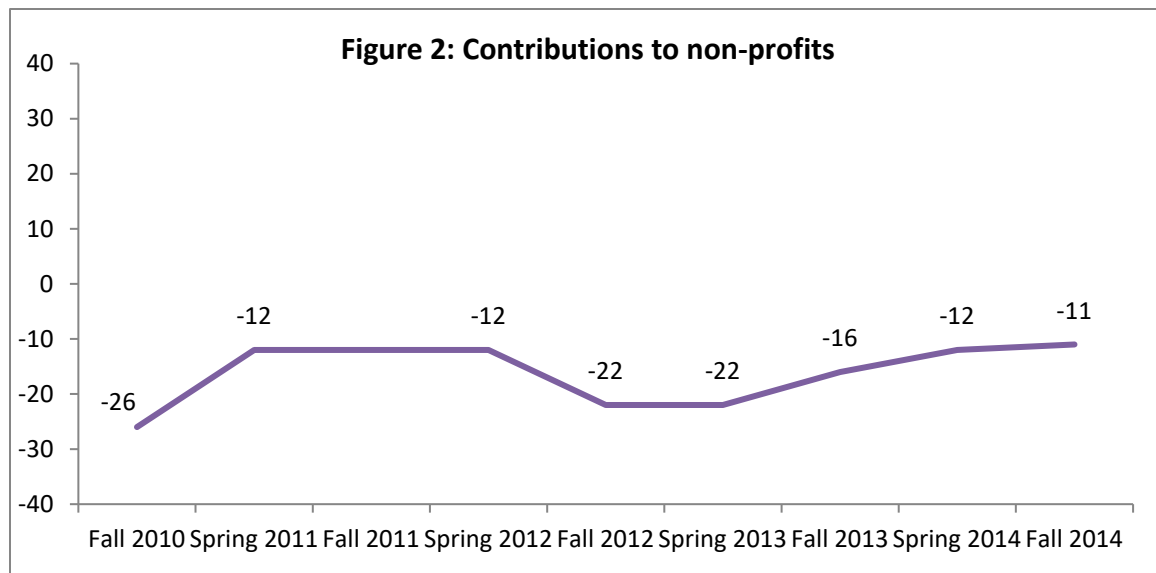
The Fall 2014 Sangamon County Economic Outlook Survey studies local businesses, firms, and non-profits in order to gauge expectations for the next twelve months across several economic indicators. The results continue a positive trajectory in expectations about individual firms and sectors, and also indicate a steady increase in expectations about the overall economy. When asked about the economic outlooks for their own individual firms, their firm's sectors, and the overall Sangamon County, local employers are positive. In previous surveys, expectations about the individual's own firm or business as well as their firm's sector received better expectations than the overall Sangamon County economy. This continues to be true in the Fall 2014 survey, however, the difference in expectations is less. Individuals have very positive expectations about their own organization (an *IIS* of +14, which is the second highest expectation since the outlook survey began in 2008), as well as positive expectations for both their firm's sector (*IIS* of +11) and the overall Sangamon County economy (*IIS* of +8). In fact, expectations for the overall Sangamon County economy increased 6 points from the Spring 2014 survey. This is a steady increase of a total of 22 points since Fall 2012.

Figure 1 displays the longitudinal analysis of Intensity Index Scores (*IIS*) for the overall Sangamon County economy, respondents' firm's sector, and individual firms/businesses/organizations.



Expectations for non-profits continue decline

As seen in figure 2, Sangamon County employers, on average, have been pessimistic about expected contributions to non-profit organizations. Since Fall 2010, expected contributions to non-profits has been negative. The Fall 2014 survey is not different and while it is a slight improvement since Spring 2014 (+1 in IIS scores), the overall expectations are still negative. In fact, this is the single item in the survey that has not rebounded since the recession.



According to the Urban Institute, a nonpartisan economic and public policy research organization, nonprofit organizations nationally fared relatively well during and after the recession. According to a series of briefs issued by the Urban Institute³ as well as a report from Indiana University's School of Philanthropy,⁴ in many instances the nonprofit sector grew during the recession. However, this growth is limited to organizations focusing on healthcare and education. Organizations that focus on social assistance and the arts did not fare as well and are just beginning to experience renewed growth in contributions.

In Illinois, non-profit organizations struggle with late payments from the state government and declining government contracts. According to the 2013 National Study of Nonprofit-Government Contracts & Grants⁵, 75 percent of Illinois nonprofit organizations reported late payments from the government. In addition, 51 percent reported that the greatest decline in their resources is from state government contracts, and when nonprofits have state contracts, less than one-third reported that government contracts covered the full costs.

³ These briefs are available at www.urban.org/nonprofits-great-recession/.

⁴ Available at <http://www.indiana.edu/~nonprof/results/inemploy/innonprofemploytrendsr recession.php>

⁵ Available at <http://www.urban.org/publications/412962.html>

Biggest assets and liabilities for Sangamon County employers

The Fall 2014 Sangamon County Economic Outlook Survey includes a topical section examining the assets and liabilities for doing business in Sangamon County. Respondents were given 23 items and asked to report whether the item was a “big asset,” “small asset,” “neither asset nor liability,” “small liability,” or “big liability” for doing business in Sangamon County. Table 2 below presents the mean and standard deviation for responses to each item. Lower scores indicate more positive ratings. As seen in the table, respondents believe that “health care facilities and quality” is the greatest asset for doing business in Sangamon County while the “total state taxes on business” is the greatest liability. The other top asset in Sangamon County was “proximity to colleges/universities/technical schools.”

Table 2. Assets or liabilities for doing business in Sangamon County

Asset or liability?	Mean score (SD)⁶
Health care facilities and quality	1.96(.870)
Proximity to colleges/universities/technical schools	2.35(.844)
Cost of living and housing	2.57(1.01)
Access/proximity to transportation systems (highway, rail, air)	2.59(.902)
Crime and public safety services	2.71(.888)
Being located in the state capital	2.72(.871)
Recreational, social, and cultural opportunities	2.75(.851)
Cost of/ availability of land and business or expansion possibilities	2.78(.818)
Access to/cost of communications networks	2.81(.808)
Utilities- access to/cost of (electricity, natural gas, water supply, waste disposal)	2.83(1.00)
Environment and climate	2.87(.841)
Local government incentives to business	2.91(.905)
K-12 education system	2.92(.929)
Local business climate and reputation	2.94(1.05)
Availability of workforce	2.98(1.05)
Quality of workforce	3.01(1.16)
State government incentives to business	3.22(.973)
Local zoning/permits and regulations	3.50(.849)
State permits and regulations	3.65(.814)
Total local taxes on business	3.72(.976)
State business climate and reputation	3.81(1.17)
Workers compensation processes	3.82(.969)
Total state taxes on business	4.05(1.0)

⁶ SD refers to standard deviation.

The Sangamon County Economy

The Fall 2014 survey indicates mixed expectations for the overall Sangamon County economy (see figure 3). Thirty-seven percent of respondents report that they expect an increase in the overall economy, 43.4 percent expect it to stay the same, and 29.5 percent expect a small decline over the next twelve months.

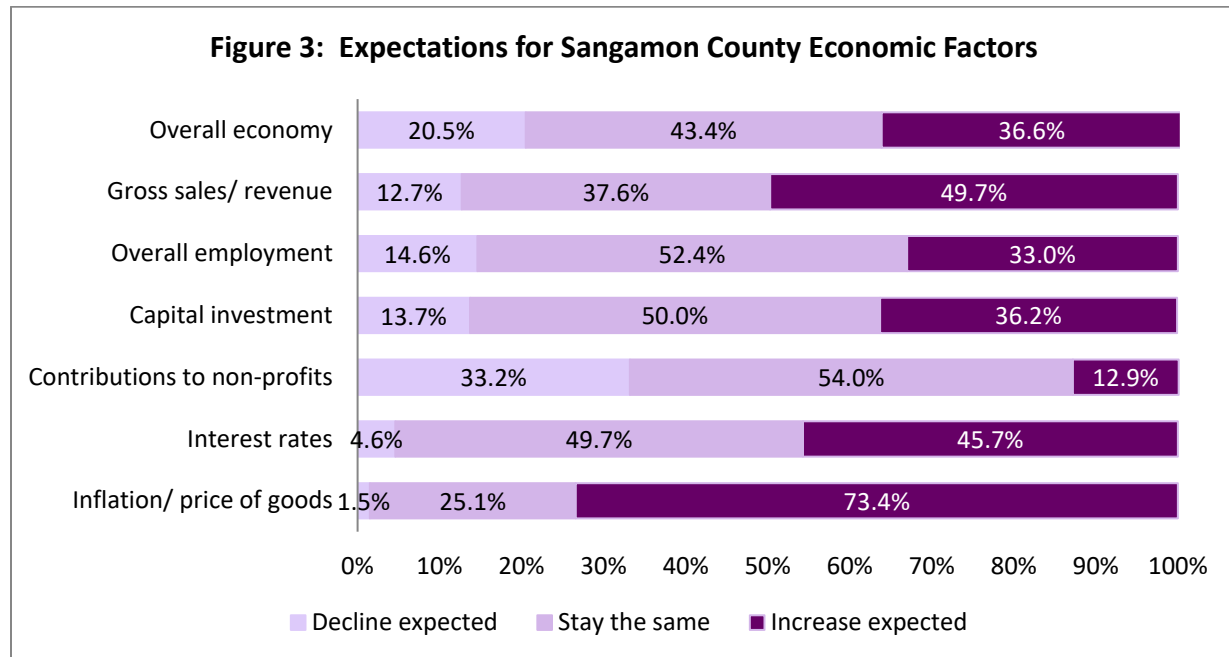


Table 3 displays the current Intensity Index Scores, the Spring 2014 Intensity Index scores, as well as the changes between the scores. In general, respondents' expectations are more positive for Sangamon County now than in the spring. As seen in the table, respondents are positive towards the majority of the economic factors with a couple noticeable exceptions. First, respondents report negative expectations for contributions to non-profits in Sangamon County. However, contributions to non-profits are slightly more positive now than six months ago.

Table 3. Intensity Index Scores for overall Sangamon County factors

	Fall 2014 IIS	Spring 2014 IIS	Difference (Fall 2014- Spring 2014)
Overall employment	+10	+4	+56
Capital investment	+11	+6	+5
Interest rates	+22	+25	-3
Gross sales/revenue	+19	+16	+3
Inflation/ price of goods	+40	+44	-4
Contributions to non-profits	-11	-12	+1
Overall economy	+8	+2	+6

In addition, respondents still expect interest rates and inflation to increase over the next twelve months. Since Fall 2009, the majority of survey respondents report that they expect inflation to increase to some degree (either small or large). This is despite the fact that the current inflation rate is 1.6 percent, which is only a .1 percentage point increase since October 2013.⁷

Examining Expectations for Economic Sectors

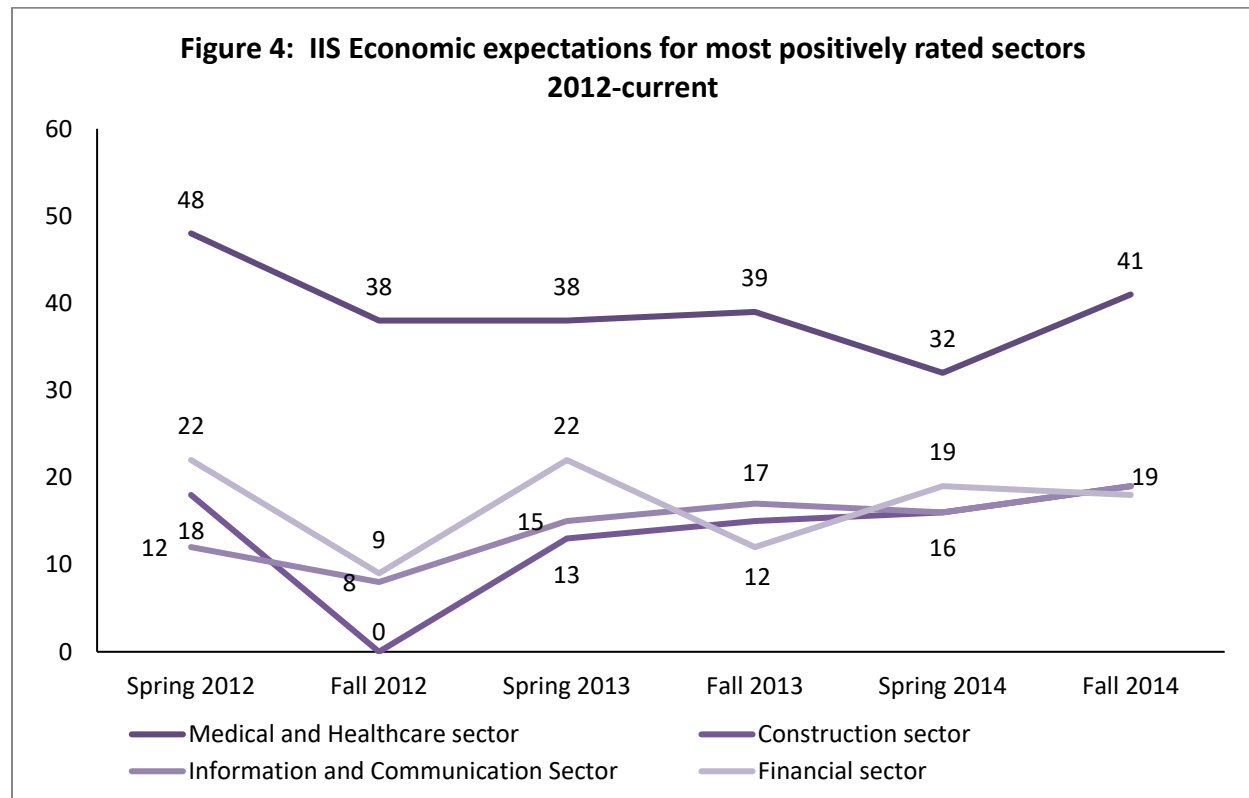
In examining respondents' expectations for each economic sector, we find that respondents hold slightly different expectations for the forthcoming year. Still, for nearly all sectors, the Intensity Index Scores display positive expectations (see Table 4). Once again, the medical/ health care sector is the most positively rated economic sector in Sangamon County with an *IIS* of +41. This is a nine point increase from Spring 2014 and continues an upward trend in expectations regarding the medical/health care sector. The least positively rated sectors are natural resources/ mining and manufacturing with respective *IIS* scores of -14 and -10. When compared to six months ago, respondents report lower expectations for nine of the fourteen listed economic sectors. Yet, respondents remain optimistic about their own firm's sector, regardless of which sector they work in. For example, while all respondents report negative expectations for the manufacturing sector, on average, those working in manufacturing still report positive expectations.

Table 4. Intensity Index Scores for specific economic sectors

	Fall 2014 <i>IIS</i>	Spring 2014 <i>IIS</i>	Difference (Fall 2014- Spring 2014)
Own firm's sector	+11	+9	+2
Construction	+19	+16	+3
Manufacturing	-10	-1	-9
Wholesale trade	+5	+6	-1
Retail trade	+8	+13	-5
Transportation/ warehousing	+4	+10	-6
Finance/ insurance/ real estate	+18	+19	-1
Medical/ health care	+41	+32	+9
Education/ educational services	+6	+3	+3
Accommodations/ food/ entertainment / recreation	+7	+8	-1
Information and communications systems	+19	+16	+3
Business and professional services	+10	+11	-1
Personal services	+6	+5	+1
Natural resources/ mining	-14	-4	-10
Public administration	-4	+7	-3

⁷ According to the U.S. Bureau of Labor Statistics' estimate, the CPI for Midwest urban cities has increased from 205 in Fall 2009 to 226 in Fall 2014, which is not considered a significant increase in inflation rates.

As seen in figure 4, the four sectors that receive the most positive ratings by respondents are the medical/ healthcare sector (+41 IIS), the construction sector (+19 IIS), the information/ communication sector (+19 IIS), and the finance/ insurance/ real estate sector (+18 IIS). Consistently, these four sectors have been the most positively rates sectors since the Spring 2012 survey.

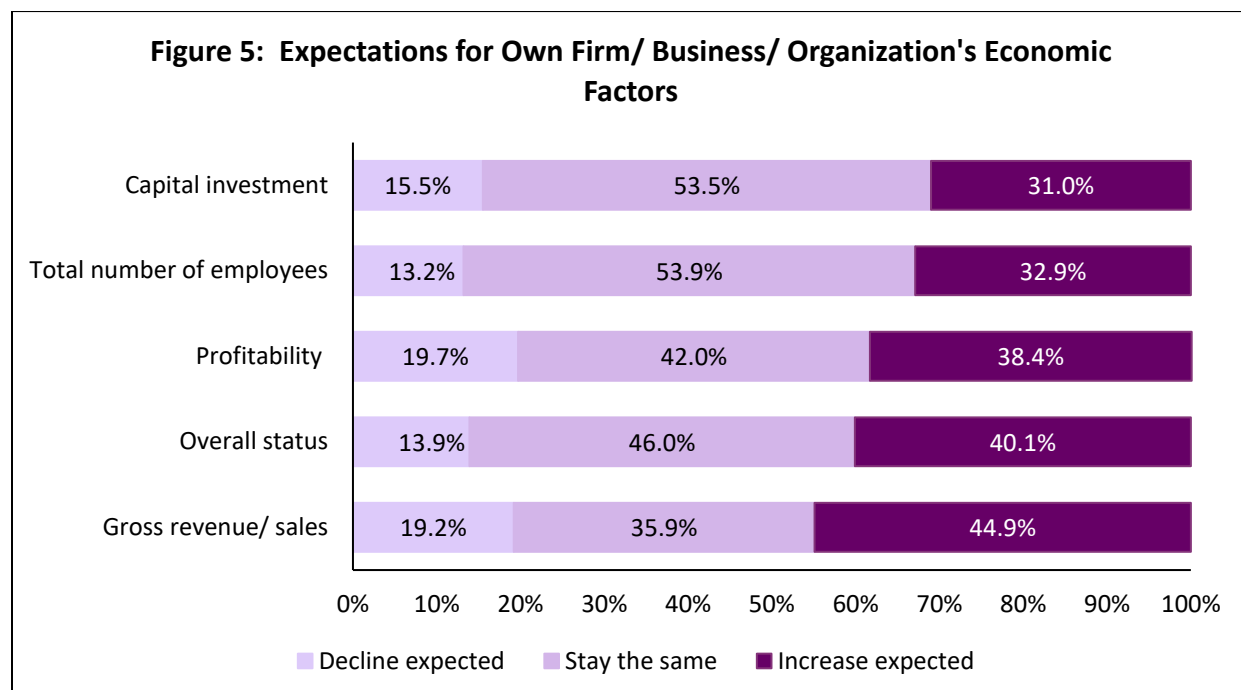


Overall Expectations for “Your” Firm/ Organization

The Fall 2014 Survey indicates that expectations for individual businesses/ firms/ organizations over the next 12 months are very similar to the Spring 2014 results. Respondents rate all economic aspects of their own firm/ business/ organization positively, with gross revenue/ sales (IIS of +8) and overall status (IIS of +14) receiving the most positive ratings. Overall, expectations regarding capital investment are the least positive (IIS of +8). Interesting, expectations regarding total number of employees experienced a five point increase from Spring 2014 to Fall 2014, from an IIS of +6 in Spring 2014 to +11 in Fall 2014. Overall, the IIS scores remain very stable between the Spring and Fall of 2014 (see Table 5).

	Fall 2014 IIS	Spring 2014 IIS	Difference (Fall 2014 - Spring 2014)
Capital investment	+8	+11	-3
Total number of employees	+11	+6	+5
Gross revenue/ sales	+14	+14	0
Profitability	+9	+8	+1
Overall status	+14	+13	+1

As seen in figure 5, 44.9 percent of respondents report that they expect an increase in their gross revenue/ sales over the next 12 months. This is followed by 40.1 percent expecting an increase in overall status, 38.4 percent expecting an increase in profitability, 32.9 percent expecting an increase in total number of employees, and 31.0 percent expecting an increase in capital investment. The majority of all respondents report that they expect capital investment and the total number of employees employed by their organization to remain the same (respectively, 53.5 percent and 53.9 percent).



Biggest Challenges Facing Sangamon County Employers

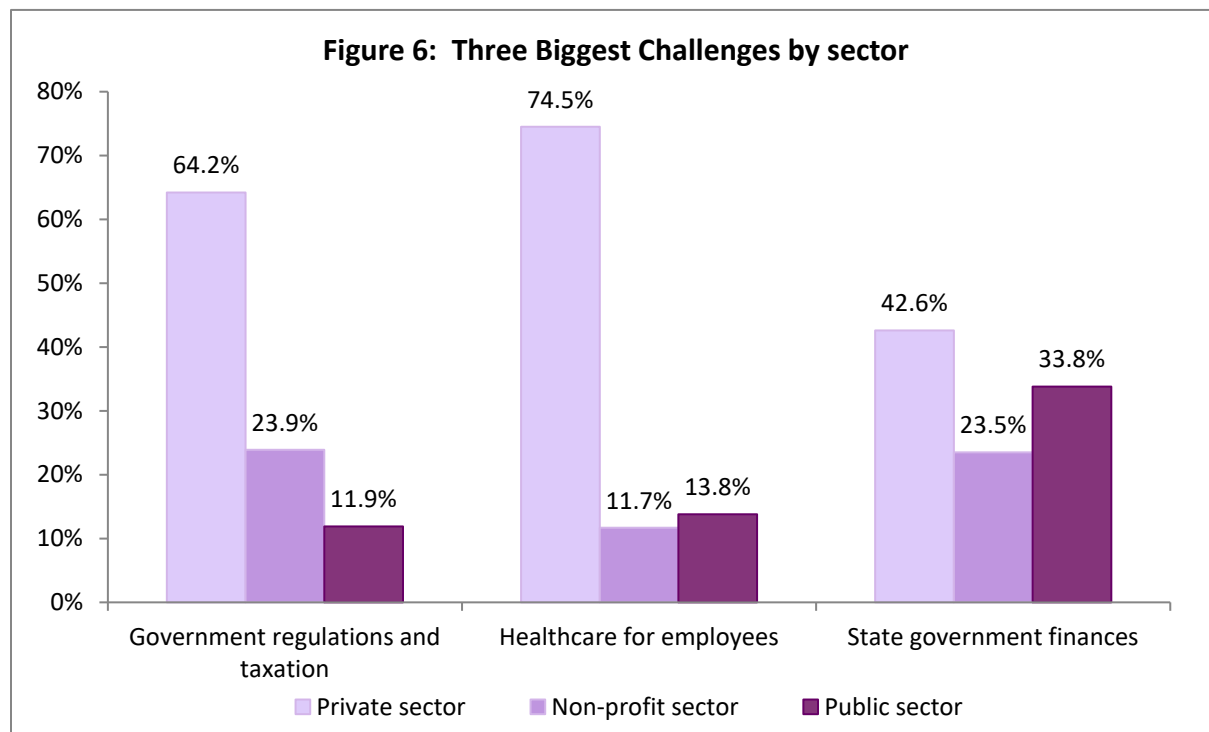
Survey respondents were asked to identify the three biggest challenges for their business/ firm/ organization over the next 12 months from a list of pre-identified challenges. As seen in Table 6, government regulations and taxation weigh the heaviest on the minds of local area employers (which is consistent with previous results). Forty-seven percent of respondents report that government regulations and taxation is going to be one of the biggest challenges facing them in the next 12 months. One-third of employers are also concerned about providing healthcare for employees (including the implementation of the Affordable Care Act) with 33.3 percent of respondents citing this as one of the biggest challenges for their business/ firm/ organization.⁸ State government finances also received 33.3 percent of respondents reporting that it will be one of their biggest challenges.

	Frequency	Valid Percent
Government regulations and taxation	98	47.3%
Healthcare for employees (e.g., Affordable Care Act)	69	33.3%
State government finances	69	33.3%
Availability of skilled/ trained workers	54	26.1%
Competition from local/ state/ national firms	51	24.6%
Employee (union and nonunion) compensation and benefits (not healthcare)	50	24.2%
Consumer confidence/ spending	47	22.7%
Energy prices	33	15.9%
Commodity prices	32	15.5%
Inflation	27	13.0%
Interest rates	12	5.8%
Global competition	8	3.9%

It is important to note that none of the challenges received a majority of respondents reporting that it was going to be one of the three biggest challenges facing their organization over the next twelve months. This may be due to differences in responses among types of sectors (public, non-profit, or private). While all three types of employers report that government regulations and taxation, healthcare for employees, and state government finances are their biggest challenges, a lower percentage of non-profit and public sector respondents report facing any of these challenges (see figure 6)⁹. In particular, a majority of private sector employers report that government regulations and taxation and healthcare for employees are going to be their biggest challenges over the next 12 months, compared to less than one-fourth of public sector and non-profit sector employers. The only shared concern is with state government finances, in which 33.8 percent of public sector and 42.6 percent of private sector employers report that it is one of their biggest challenges.

⁸ The Sangamon County Economic Outlook Survey has included “healthcare for employees, Affordable Care Act” as a pre-identified challenge since Spring 2014. In both surveys, it is one of the biggest challenges list for Sangamon County employers.

⁹ This may also be due to the fact that fewer non-profit and public sector employers participate in the survey.



Topical Section for the Fall 2014 Survey

The topical section for the Fall 2014 Sangamon County Economic Outlook Survey includes two unique sections: the assets and liabilities for conducting business in Sangamon County and the effect that the Illinois State Fair has on local businesses.

Assets and liabilities for doing business in Sangamon County

The Fall 2014 Sangamon County Economic Outlook Survey includes a topical section examining the assets and liabilities for doing business in Sangamon County. Respondents were given 23 items and asked to report whether the item was a “big asset,” “small asset,” “neither asset nor liability,” “small liability,” or “big liability” for doing business in Sangamon County. The scale ranges from 1 to 5, with “1” representing “big asset” and “5” representing “big liability.” Table 7 presents the mean and standard deviation for responses to each item. Lower scores indicate more positive ratings. As seen in the table, respondents believe that “health care facilities and quality” is the greatest asset for doing business in Sangamon County while the “total state taxes on business” is the greatest liability. The other top asset in Sangamon County was “proximity to colleges/universities/technical schools.” As seen in figure 7, on average, 2 items were categorized as assets for doing business in Sangamon County (mean score of less than 3), while five items, on average, were categorized as a liability. Sixteen items received average scores between 2.5 and 3.5, indicating relatively neutral evaluations (neither an asset nor a liability).

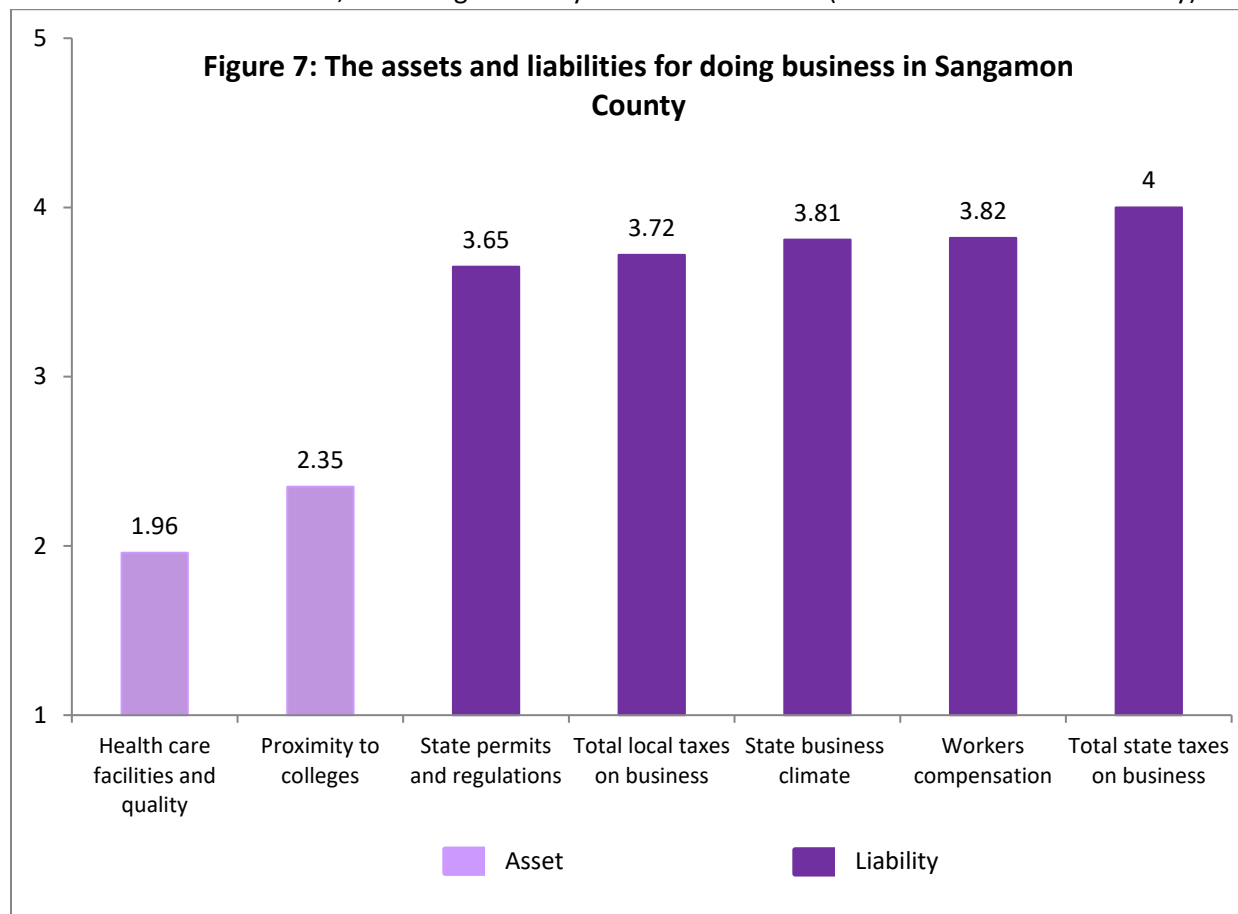


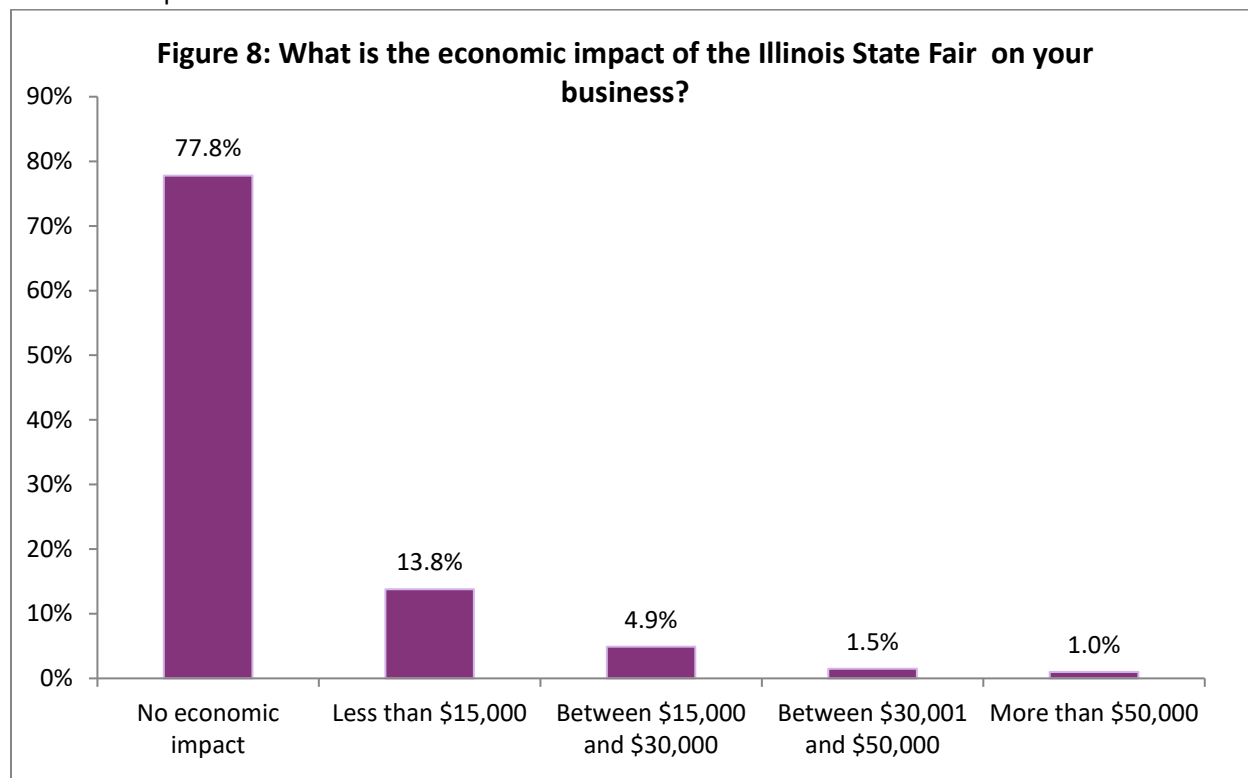
Table 7. Assets or liabilities for doing business in Sangamon County

Asset or liability?	Mean score (SD)
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Proximity to colleges/universities/technical schools	2.35(.844)
Cost of living and housing	2.57(1.01)
Access/proximity to transportation systems (highway, rail, air)	2.59(.902)
Crime and public safety services	2.71(.888)
Being located in the state capital	2.72(.871)
Recreational, social, and cultural opportunities	2.75(.851)
Cost of/ availability of land and business or expansion possibilities	2.78(.818)
Access to/cost of communications networks	2.81(.808)
Utilities- access to/cost of (electricity, natural gas, water supply, waste disposal)	2.83(1.00)
Environment and climate	2.87(.841)
Local government incentives to business	2.91(.905)
K-12 education system	2.92(.929)
Local business climate and reputation	2.94(1.05)
Availability of workforce	2.98(1.05)
Quality of workforce	3.01(1.16)
State government incentives to business	3.22(.973)
Local zoning/permits and regulations	3.50(.849)
State permits and regulations	3.65(.814)
Total local taxes on business	3.72(.976)
State business climate and reputation	3.81(1.17)
Workers compensation processes	3.82(.969)
Total state taxes on business	4.05(1.0)

How does the Illinois State Fair affect your organization?

According to a 2011 Economic Impact Study conducted by the University of Illinois' Regional Economics Applications Laboratory in the Institute of Government and Public Affairs, the 2011 Illinois State Fair generated \$47 million in business revenue. In an effort to examine how the Illinois State Fair affects Sangamon County businesses, survey respondents were asked two questions regarding the possible effect that the Illinois State Fair may have on their business/organization. First, they were asked whether the Illinois State Fair has no economic impact, an economic impact of less than \$15,000, an economic impact between \$15,000 and \$30,000, an economic impact between \$30,001 and \$50,000, or an economic impact of more than \$50,000 on their own business/organization. Three-fourths of survey respondents report that the Illinois State Fair has no economic impact on their own business/organization. Fourteen percent of employers report that the Illinois State Fair has an economic impact of less than \$15,000 on their business/organization. Only 7.4 percent of Sangamon County

employers report that an economic impact of the Illinois State Fair on their business/organization of more than \$15,000 (see figure 8). In addition, 58.8 percent of survey respondents from the accommodations/food/entertainment/recreation sector report that the Illinois State Fair has no economic impact on their business.



Secondly, respondents were asked whether their organization experienced an increased number of employees (including part-time workers), expanded hours of operation, or an increase in gross revenue/sales due to the Illinois State Fair. Slightly less than 8 percent of local employers report that they experience an increase in gross revenue/sales, 2.4 percent experienced expanded hours of operation, and only 1 percent report that they increased their number of employees.

Sangamon County Economic Outlook Survey
(N=207)

Section 1: Sangamon County Economic Expectations

Over the next 12 months, what are your expectations for the local economy in Sangamon County? Do you think each aspect of the local economy will see a large decline, small decline, stay the same, small increase, or large increase?

Overall employment (Intensity index score: +9.5)

	Valid percent(n)
Large decline	0%(0)
Small decline	14.6%(30)
Stay the same	52.4%(108)
Small increase	32.5%(67)
Large increase	0.5%(1)

Capital investment (Intensity index score: +11.0)

	Valid percent(n)
Large decline	1.5%(3)
Small decline	12.2%(24)
Stay the same	50.0%(98)
Small increase	35.2%(69)
Large increase	1.0%(2)

Interest rates (Intensity index score: +21.8)

	Valid percent (n)
Large decline	0%(0)
Small decline	4.6%(9)
Stay the same	49.7%(97)
Small increase	43.1%(84)
Large increase	2.6%(5)

Gross sales/revenue (Intensity index score: +19.0)

	Valid percent(n)
Large decline	0%(0)
Small decline	12.7%(25)
Stay the same	37.6%(74)
Small increase	48.7%(96)
Large increase	1.0%(2)

Inflation/price of goods (Intensity index score: +39.7)

	Valid percent(<i>n</i>)
Large decline	0%(0)
Small decline	1.5%(3)
Stay the same	25.1%(51)
Small increase	66.0%(134)
Large increase	7.4%(15)

Contributions to non-profits (Intensity index score: -11.4)

	Valid percent(<i>n</i>)
Large decline	3.0%(6)
Small decline	30.2%(61)
Stay the same	54.0%(109)
Small increase	12.4%(25)
Large increase	0.5%(1)

The overall economy (Intensity index score: +7.8)

	Valid percent(<i>n</i>)
Large decline	1.5%(3)
Small decline	18.5%(38)
Stay the same	43.4%(89)
Small increase	36.1%(74)
Large increase	0.5%(1)

Section 2: Expectations for Sangamon County Economic Sectors

Over the next 12 months, what are your expectations for following economic sectors in Sangamon County? Do you think each aspect of the local economy will see a large decline, small decline, stay the same, small increase, or large increase?

Construction (Intensity index score: +18.6)

	Valid percent(<i>n</i>)
Large decline	1.5%(3)
Small decline	13.4%(27)
Stay the same	35.6%(72)
Small increase	45.5%(92)
Large increase	4.0%(8)

Manufacturing (Intensity index score: -10.4)

	Valid percent(<i>n</i>)
Large decline	4.0%(8)
Small decline	25.3%(50)
Stay the same	58.1%(115)
Small increase	12.6%(25)
Large increase	0%(0)

Wholesale trade (Intensity index score: +4.6)

	Valid percent(<i>n</i>)
Large decline	0.5%(1)
Small decline	14.7%(29)
Stay the same	60.9%(120)
Small increase	22.8%(45)
Large increase	1.0%(2)

Retail trade (Intensity index score: +7.9)

	Valid percent(<i>n</i>)
Large decline	0.5%(1)
Small decline	19.7%(40)
Stay the same	44.8%(91)
Small increase	33.5%(68)
Large increase	1.5%(3)

Transportation/ warehousing (Intensity index score: +3.5)

	Valid percent(n)
Large decline	0.5%(1)
Small decline	11.4%(23)
Stay the same	69.7%(140)
Small increase	17.4%(35)
Large increase	1.0%(2)

Finance/insurance/real estate (Intensity index score: +17.7)

	Valid percent(n)
Large decline	1.0%(2)
Small decline	8.9%(18)
Stay the same	45.5%(92)
Small increase	43.1%(87)
Large increase	1.5%(3)

Medical/health care (Intensity index score: +40.9)

	Valid percent(n)
Large decline	1.5%(3)
Small decline	4.4%(9)
Stay the same	20.6%(42)
Small increase	57.8%(118)
Large increase	15.7%(32)

Education/ educational services (Intensity index score: +6.4)

	Valid percent(n)
Large decline	0.5%(1)
Small decline	13.9%(28)
Stay the same	59.9%(121)
Small increase	23.8%(48)
Large increase	2.0%(4)

Accommodations/food/entertainment/recreation (Intensity index score: +7.1)

	Valid percent(n)
Large decline	1.0%(2)
Small decline	12.7%(26)
Stay the same	58.3%(119)
Small increase	27.0%(55)
Large increase	1.0%(2)

Information and communications systems (Intensity index score: +19.4)

	Valid percent(n)
Large decline	0%(0)
Small decline	3.5%(7)
Stay the same	56.7%(114)
Small increase	37.3%(75)
Large increase	2.5%(5)

Business and professional support services (Intensity index score: +9.6)

	Valid percent(n)
Large decline	0.5%(1)
Small decline	9.9%(20)
Stay the same	60.6%(123)
Small increase	28.1%(57)
Large increase	1.0%(2)

Personal services (Intensity index score: +5.5)

	Valid percent(n)
Large decline	0.5%(1)
Small decline	12.4%(25)
Stay the same	62.7%(126)
Small increase	24.4%(49)
Large increase	0%(0)

Natural resources and mining (Intensity index score: -13.7)

	Valid percent(n)
Large decline	2.5%(5)
Small decline	35.5%(70)
Stay the same	50.8%(100)
Small increase	9.1%(18)
Large increase	2.0%(4)

Public administration (Intensity index score: -4.2)

	Valid percent(n)
Large decline	1.0%(2)
Small decline	20.9%(42)
Stay the same	65.2%(131)
Small increase	11.4%(23)
Large increase	1.5%(3)

Which of the above economic sectors best describes your firm's primary economic activity?
(Intensity index score for own sector: +10.8)

	Valid percent(n)
Construction	10.1%(21)
Manufacturing	4.3%(9)
Wholesale trade	1.9%(4)
Retail trade	16.9%(35)
Transportation/warehousing	2.9%(6)
Finance/insurance/real estate	9.7%(20)
Medical/health care	5.8%(12)
Education/educational services	6.3%(13)
Accommodations/food/entertainment/recreation	8.7%(18)
Information and communication systems	2.4%(5)
Business and professional support services	12.6%(26)
Personal services	8.2%(17)
Natural resources and mining	.5%(1)
Public administration	9.7%(20)

Section 3: Expectations for Your Business/Firm/Organization Sangamon County

Over the next 12 months, what are your expectations for your business/firm/ organization in Sangamon County? Do you think each aspect of the local economy will see a large decline, small decline, stay the same, small increase, or large increase?

Capital investment in firm (Intensity index score: +8.0)

	Valid percent(n)
Large decline	2.5%(5)
Small decline	13.0%(26)
Stay the same	53.5%(107)
Small increase	28.0%(56)
Large increase	3.0%(6)

Total number of employees (Intensity index score: +10.5)

	Valid percent(n)
Large decline	0.5%(1)
Small decline	12.7%(26)
Stay the same	53.9%(110)
Small increase	30.9%(63)
Large increase	2.0%(4)

Gross revenue/sales (Intensity index score: +13.9)

	Valid percent(n)
Large decline	2.5%(5)
Small decline	16.7%(33)
Stay the same	35.9%(71)
Small increase	40.4%(80)
Large increase	4.5%(9)

Profitability (Intensity index score: +9.3)

	Valid percent(n)
Large decline	1.6%(3)
Small decline	18.1%(35)
Stay the same	42.0%(81)
Small increase	36.8%(71)
Large increase	1.6%(3)

Overall status (Intensity index score: +13.6)

	Valid percent(n)
Large decline	1.0%(2)
Small decline	12.9%(26)
Stay the same	46.0%(93)
Small increase	38.1%(77)
Large increase	2.0%(4)

Right now, as you look over the next 12 months, what are the three biggest challenges facing your business/firm/organization.

	Valid percent(n)
Government regulations and taxation	47.3%(98)
Healthcare for employees (e.g., Affordable Care Act)	33.3%(69)
State government finances	33.3%(69)
Availability of skilled/trained workers	26.1%(54)
Competition from local/state/national firms	24.6%(51)
Employee (union and nonunion) compensation and benefits (not healthcare)	24.2%(50)
Consumer confidence/spending	22.7%(47)
Energy prices	15.9%(33)
Commodity prices	15.5%(32)
Inflation	13.0%(27)
Interest rates	5.8%(12)
Global competition	3.9%(8)
Other specify:	4.3%(9)

Others mentioned: bad location, federal funding of transportation projects, private donations

Section 4: Sangamon County Strengths and Weaknesses

This section is the topical portion of the survey and changes during each survey administration. The Fall 2014 survey includes questions on minimum wage laws and quality of utility services.

Thinking about businesses or organizations like yours, do you think the following are a big asset, small asset, neither an asset nor a liability, a small liability, or a big liability for doing business in Sangamon County?

Cost of/availability of land and expansion possibilities

	Valid percent(n)
Big asset	6.6%(13)
Small asset	24.2%(48)
Neither an asset nor a liability	56.1%(111)
Small liability	10.6%(21)
Big liability	2.5%(5)

Access to/cost of communications networks

	Valid percent(n)
Big asset	5.6%(11)
Small asset	25.3%(50)
Neither an asset nor a liability	54.0%(107)
Small liability	13.1%(26)
Big liability	2.0%(4)

Access/proximity to transportation systems (highway, rail, air)

	Valid percent(n)
Big asset	12.4%(25)
Small asset	30.3%(61)
Neither an asset nor a liability	44.3%(89)
Small liability	11.4%(23)
Big liability	1.5%(3)

Availability of workforce

	Valid percent(n)
Big asset	7.3%(15)
Small asset	25.9%(53)
Neither an asset nor a liability	36.6%(75)
Small liability	22.4%(46)
Big liability	7.8%(16)

Quality of workforce

	Valid percent(n)
Big asset	11.5%(23)
Small asset	23.5%(47)
Neither an asset nor a liability	27.5%(55)
Small liability	28.0%(56)
Big liability	9.5%(19)

Total state taxes on business

	Valid percent(n)
Big asset	3.1%(6)
Small asset	2.1%(4)
Neither an asset nor a liability	23.7%(46)
Small liability	29.4%(57)
Big liability	41.8%(81)

Total local taxes on business

	Valid percent(n)
Big asset	2.6%(5)
Small asset	6.1%(12)
Neither an asset nor a liability	31.6%(62)
Small liability	36.2%(71)
Big liability	23.5%(46)

Local zoning permits and regulations

	Valid percent(n)
Big asset	1.5%(3)
Small asset	5.6%(11)
Neither an asset nor a liability	47.2%(93)
Small liability	32.5%(64)
Big liability	13.2%(26)

State permits and regulations

	Valid percent(n)
Big asset	1.0%(2)
Small asset	2.1%(4)
Neither an asset nor a liability	43.8%(85)
Small liability	36.6%(71)
Big liability	16.5%(32)

Workers compensation processes

	Valid percent(n)
Big asset	2.5%(5)
Small asset	3.0%(6)
Neither an asset nor a liability	33.5%(68)
Small liability	32.0%(65)
Big liability	29.1%(59)

Local business climate and reputation

	Valid percent(n)
Big asset	7.9%(16)
Small asset	28.1%(57)
Neither an asset nor a liability	33.0%(67)
Small liability	24.1%(49)
Big liability	6.9%(14)

State business climate and reputation

	Valid percent(n)
Big asset	5.4%(11)
Small asset	8.8%(18)
Neither an asset nor a liability	21.1%(43)
Small liability	28.9%(59)
Big liability	35.8%(73)

Local government incentives to business

	Valid percent(n)
Big asset	6.3%(12)
Small asset	20.9%(40)
Neither an asset nor a liability	53.9%(103)
Small liability	13.1%(25)
Big liability	5.8%(11)

State government incentives to business

	Valid percent(n)
Big asset	5.1%(10)
Small asset	12.3%(24)
Neither an asset nor a liability	48.7%(95)
Small liability	23.1%(45)
Big liability	10.8%(21)

Crime and public safety services

	Valid percent(n)
Big asset	9.9%(20)
Small asset	26.6%(54)
Neither an asset nor a liability	47.3%(96)
Small liability	14.8%(30)
Big liability	1.5%(3)

Being located in the state capital

	Valid percent(n)
Big asset	7.4%(11)
Small asset	31.5%(47)
Neither an asset nor a liability	45%(67)
Small liability	14.1%(21)
Big liability	2.0%(3)

Cost of living and housing

	Valid percent(n)
Big asset	14.4%(29)
Small asset	34.3%(69)
Neither an asset nor a liability	35.3%(71)
Small liability	11.4%(23)
Big liability	4.5%(9)

Recreational, social, and cultural opportunities

	Valid percent(n)
Big asset	5.9%(12)
Small asset	31.2%(63)
Neither an asset nor a liability	47.0%(95)
Small liability	13.4%(27)
Big liability	2.5%(5)

Health care facilities and quality

	Valid percent(n)
Big asset	35.8%(73)
Small asset	35.8%(73)
Neither an asset nor a liability	25.5%(52)
Small liability	2.5%(5)
Big liability	0.5%(1)

Environment and climate

	Valid percent(n)
Big asset	5.5%(11)
Small asset	23.4%(47)
Neither an asset nor a liability	53.2%(107)
Small liability	14.9%(30)
Big liability	3.0%(6)

K-12 education system

	Valid percent(n)
Big asset	6.0%(12)
Small asset	24.4%(49)
Neither an asset nor a liability	46.3%(93)
Small liability	18.4%(37)
Big liability	5.0%(10)

Proximity to colleges/universities/technical schools

	Valid percent(n)
Big asset	14.2%(29)
Small asset	44.6%(91)
Neither an asset nor a liability	34.3%(70)
Small liability	5.4%(11)
Big liability	1.5%(3)

Utilities- access to/cost of (electricity, natural gas, water supply, waste disposal)

	Valid percent(n)
Big asset	8.0%(16)
Small asset	31.0%(62)
Neither an asset nor a liability	36.0%(72)
Small liability	20.0%(40)
Big liability	5.0%(10)

Finally, we are interested in how, if at all, the Illinois State Fair in Springfield impacts your firm?

Would you say that the Illinois State Fair has no economic impact, an economic impact of less than \$15,000, an economic impact between \$15,000 and \$30,000, an economic impact between \$30,001 and \$50,000, or an economic impact of more than \$50,000 on your own business/organization?

	Valid percent(n)
No economic impact	77.8%(158)
Less than \$15,000	13.8%(28)
Between \$15,001 and \$30,000	4.9%(10)
Between \$30,001 and \$50,000	1.5%(3)
More than \$50,000	1.0%(2)

Please select whether your organization experiences any of the following business operations changes due to the Illinois State Fair?

	Valid percent(n)
Increased number of employees (including part-time workers)	1.0%(2)
Expanded hours of operation	2.4%(5)
Increased gross revenue/sales	7.7%(16)

Section 5: Demographic Information

This last section is used for analysis purposes only and is not intended to identify respondents.

Are you in the private sector, non-profit sector, or public sector?

	Valid percent(n)
Private sector (for profit)	65.5%(133)
Non-profit sector	17.2%(35)
Public sector (government)	17.2%(35)

How many years has your organization been operating in your current location:

	Valid percent(n)
2 years or less	2.5%(5)
3-5 years	2.5%(5)
6-10 years	9.6%(19)
11-20 years	28.4%(56)
21-30 years	18.8%(37)
31-40 years	9.6%(19)
41- 50 years	9.6%(19)
More than 50 years	18.8%(7)

How many years has your organization been operating in Sangamon County:

	Valid percent(n)
2 years or less	0%
3-5 years	0.5%(1)
6-10 years	2.6%(5)
11-20 years	18.7%(36)
21-30 years	21.8%(42)
31-40 years	11.9%(23)
41- 50 years	13.0%(25)
More than 50 years	31.6%(61)

How many years has your organization been operating in Illinois:

	Valid percent(n)
2 years or less	0%
3-5 years	0.5%(1)
6-10 years	1.0%(2)
11-20 years	17.0%(33)
21-30 years	21.6%(42)
31-40 years	11.3%(22)
41- 50 years	14.4%(28)
More than 50 years	34.0%(66)

Number of total full-time employees:

	Valid percent(<i>n</i>)
Less than 5	13.5%(27)
5-10 employees	22.5%(45)
11-20 employees	25.0%(50)
21-35 employees	13.0%(26)
36-50 employees	6.5%(13)
51-100 employees	8.0%(16)
101-200 employees	8.5%(17)
More than 200 employees	3.0%(6)