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the Center for State Policy and Leadership at UIS,  
and The Greater Springfield Chamber of Commerce

## Project Overview

The Sangamon County Economic Outlook Survey is a survey 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 2008<sup>1</sup> with the goal of providing a longitudinal analysis of the local economy through the lens of area organizations.

The 2015 survey results are from 263 local organizations who were contacted between September and October, 2015 by interviewers at the University of Illinois Springfield's Survey Research Office (SRO). A detailed discussion of this project's methodology is available in the Transparency Initiative Methodological Report- available at the end of this report.<sup>2</sup>

For more information about this survey, please contact Dr. Ashley Kirzinger at sro@uis.edu or (217) 206-6591. Special thanks to Richard Schuldt, Dr. Beverly Bunch, Dr. Patricia Byrnes at the University of Illinois Springfield, and Josh Collins 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.

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<sup>1</sup> The only exception being September 2011. It is important to note that the methodology for the survey has changed slightly over the past seven years. More information on this is available in the Transparency Initiative Methodological Report.

<sup>2</sup> In 2015, the UIS Survey Research Office (SRO) became a charter member of the American Association for Public Opinions Research's Transparency Initiative (TI). By joining the TI, the SRO is supporting broader and more effective disclosure of research methods by all organizations. The Transparency Initiative provides formal public recognition by AAPOR of an organization's voluntary commitment to abide by the disclosure standards in the AAPOR Code of Professional Ethics and Practices, while benefiting the public by providing more information with which to evaluate the quality of individual surveys.

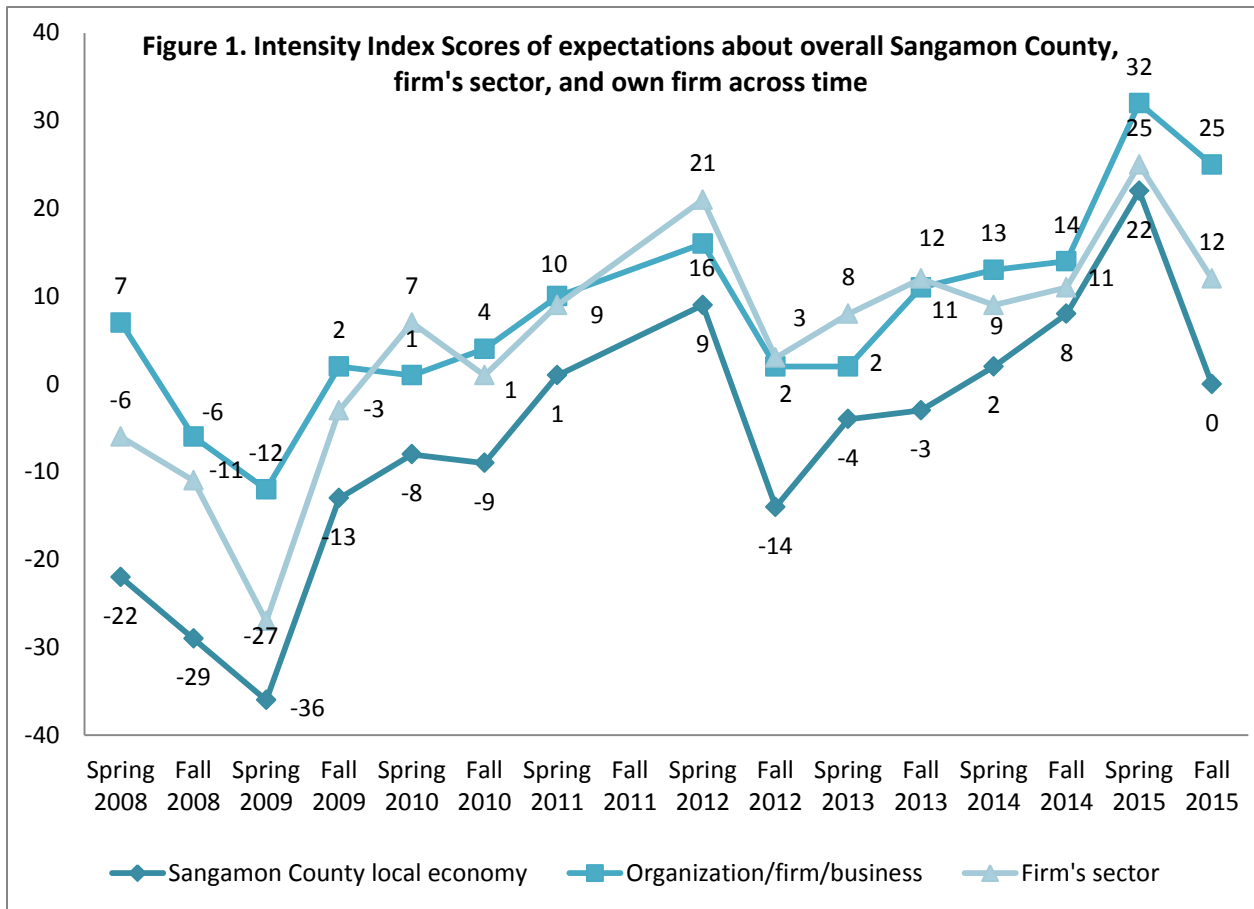
**Table 1. Business demographics of respondents**

	Responses	Valid frequency	
<b>Sector</b>			
Private sector (for-profit)	185	70.5%	
Non-profit sector	41	15.8%	
Public sector (government)	35	13.7%	
	Responses	Valid frequency	
<b>Primary Economic Activity</b>			
Construction	31	11.8%	
Manufacturing	2	0.8%	
Wholesale trade	7	2.7%	
Retail trade	40	15.2%	
Transportation/warehousing	6	2.3%	
Finance/insurance/real estate	36	13.7%	
Medical/health care	19	7.2%	
Education/educational services	15	5.7%	
Accommodations/food/entertainment/recreation	18	6.8%	
Information and communication systems	11	4.2%	
Business and professional support services	43	16.3%	
Personal services	21	8.0%	
Natural resources and mining	5	1.9%	
Public administration	9	3.4%	
	Responses	Valid frequency	
<b>Number of employees</b>			
Less than 5 employees	103	40.1%	
5-14 employees	79	30.7%	
15-29 employees	30	11.7%	
30-44 employees	9	3.5%	
45-59 employees	7	2.7%	
60-79 employees	3	1.2%	
80-99 employees	3	1.2%	
100-149 employees	7	2.7%	
150-299 employees	8	3.1%	
300 or more employees	8	3.1%	
	Mean	Maximum	St. Deviation
<b>Years in operation</b>			
Number of years in current location	21.2 years	138 years	23
Number of years in Sangamon County	29.9 years	150 years	28
Number of years in Illinois	35.9 years	150 years	31

## Executive Summary

The Sangamon County Economic Outlook Survey studies local businesses/firms as well as non-profit and public organizations in order to gauge expectations for the next twelve months across several economic indicators. By creating the Intensity Index Scores (the main indicator for economic expectations), researchers are able to compare expectations of individual business, sectors, and the overall economy each survey iteration. 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.

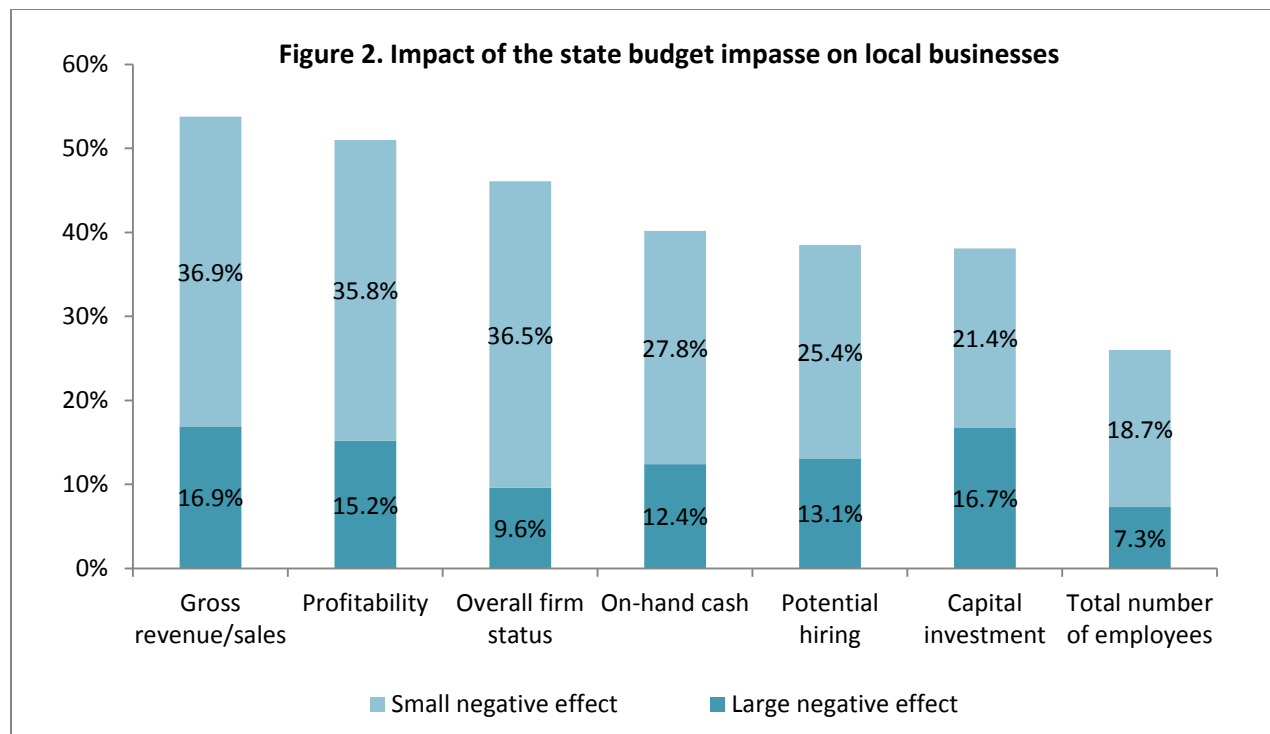
As seen in figure 1, current expectations for the overall Sangamon County economy are lower than the outlook reported six months ago. Spring 2015 expectations were the highest expectations ever reported in the Economic Outlook Survey. In addition, expectations for the overall Sangamon County measure are at their lowest point since Fall 2013. In the past six months, expectations for all three measures have decreased with local firms' expectations decreasing 7 points, expectations for their firm's sector decreasing 13 points, and expectations for the overall Sangamon County economy decreasing 22 points. This indicates a less positive outlook for the local economy for the next 12 months.



### The Effect of the State Budget Impasse

As seen in figure 1 on the previous page, the decrease in expectations (-22 points) for the overall Sangamon County economy is the largest decrease since Fall 2012 (during which Sangamon County had an unemployment rate of 7.9% compared to its current rate of 4.8%<sup>3</sup>). Yet, this decrease is perhaps surprising, given the uncertainties created for the local economy by the failure of the state to pass a budget.

In an effort to gauge how the budget impasse is affecting the local economy, the Fall 2015 topical area addressed by the survey included questions examining this issue. Respondents were asked about the type of effect (large negative, small negative, neutral, small positive, or large positive) the state budget impasse is having on different aspects of their organization or firm. As seen in Figure 2, more than 50 percent of Sangamon County organizations/firms reported that the state budget impasse is having a negative effect on their gross revenue/sales and profitability.



Fifty-four percent (53.8) of local employers report that the state budget impasse is having a negative effect on their gross revenue/sales and 51 percent report that it is having a negative impact on their profitability. In addition, 46.1 percent of Sangamon County organizations/firms/businesses report that the state budget impasse is having a negative effect on the overall status of their firm, with one-in-ten reporting that it is a “large negative effect.” As expected, a higher percentage of public sector firms report that the budget impasse is having a negative effect compared to non-profit sector organizations, and private sector businesses. For example, when asked about the overall status of their firm, 20 percent of public sector respondents report that they are experiencing a “large negative effect” compared to 14.6 percent of non-profit respondents and 6.6 percent of private sector respondents.

<sup>3</sup> According to the Bureau of Labor Statistics available at [data.bls.gov/](http://data.bls.gov/)

## The Sangamon County Economy

The Fall 2015 SCEOS shows declining expectations for the overall Sangamon County economy compared to the Spring 2015 survey (Table 3 displays the current Intensity Index Scores, the Spring 2015 Intensity Index scores, as well as the changes between the scores). On nearly every indicator, respondents currently have more negative expectations. The result is that respondents' current expectations for the overall economy, as well as for overall employment and capital investment are relatively stable, in the aggregate. Expectations for gross sales/revenue are still positive (+11), but expectations for contributions to non-profits have dropped from positive (+6) to negative (-8).

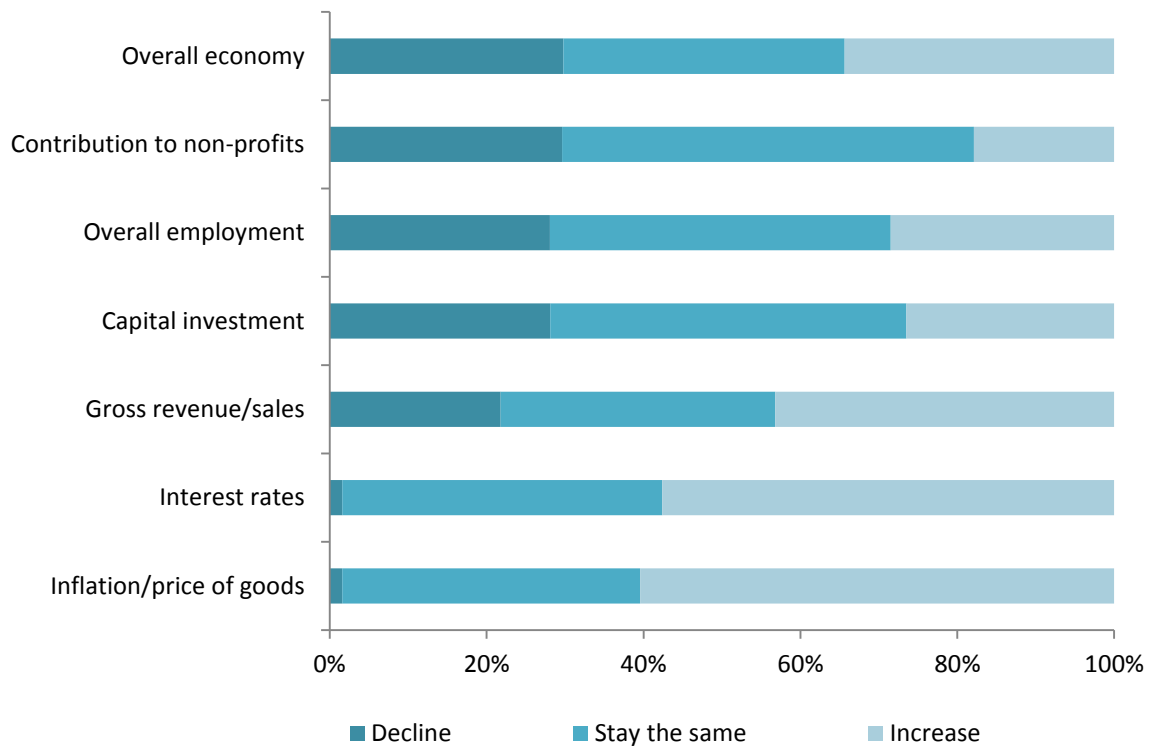
	Fall 2015 <i>IIS</i>	Spring 2015 <i>IIS</i>	Difference (Fall 2015-Spring 2015)
Overall employment	-1	+17	-16
Capital investment	-2	+15	-13
Interest rates	+29	+25	+4
Gross sales/revenue	+11	+29	-18
Inflation/ price of goods	+31	+33	-2 <sup>4</sup>
Contributions to non-profits	-8	+6	-14
Overall economy	0	+22	-22

There are two exceptions to this declining trend in expectations: inflation/price of goods and interest rates (57.6 percent of respondents report expecting an increase in interest rates over the next 12 months). It is important to note that Sangamon County employers may be reacting to the message released by the Federal Reserve, rather than any economic indicator within the Sangamon County economy.<sup>5</sup> This is displayed in figure 3 on the following page.

<sup>4</sup> It is important to note that a decrease in expectations pertaining to inflation is not necessarily a negative change. According to the Federal Reserve Bank of St. Louis, a stable inflation rate is the most positive expectation so any change, positive or negative, could be seen as a challenge to financial stability.

<sup>5</sup> In October 2015, Federal Reserve Chairwoman Janet Yellen announced that the Federal Reserve will begin raising interest rates later this year, after announcing to keep the rates stable during the September meeting (the Federal Reserve has kept its benchmark interest rate near zero for the past 6 years).

**Figure 3. Expectations of the Sangamon County economy**



## Examining Expectations for Economic Sectors

Most respondents remain optimistic about their own firm's sector, regardless of which sector they work in, but expectations have decreased since spring. In examining all respondents' expectations for each economic sector, we find that the majority of economic sectors expect some growth, but a decline from the Spring 2015 survey, except education- which has a four point increase in expectations<sup>6</sup>. In addition, respondents continue to expect a decline over the next few months within a few sectors (mainly manufacturing, natural resources/mining, and public administration) which is consistent with the Spring 2015 findings.

	<b>Fall 2015 IIS</b>	<b>Spring 2015 IIS</b>	<b>Difference (Fall 2015-Spring 2015)</b>
Own firm's sector	+12	+25	-13
Construction	+8	+28	-20
Manufacturing	-14	-7	-7
Wholesale trade	+2	+16	-14
Retail trade	+12	+27	-15
Transportation/ warehousing	+6	+12	-6
Finance/ insurance/ real estate	+17	+34	-17
Medical/ health care	+52	+54	-2
Education/ educational services	+1	-3	+4
Accommodations/ food/ entertainment/ recreation	+5	+21	-16
Information and communications systems	+23	+31	-8
Business and professional services	+5	+15	-10
Personal services	+4	+13	-9
Natural resources/ mining	-21	-20	-1
Public administration	-9	-2	-7

The sectors that receive the most negative ratings by respondents are public administration (-9), manufacturing (-14), and natural resources/mining (-21). Once again, the medical/ health care sector is the most positively rated economic sector in Sangamon County with an IIS of +52. This is a two point decrease from Spring 2015 but still indicates a very positive outlook for the medical and healthcare sector in Sangamon County. The construction sector saw the biggest decrease in expectations (from +28 in Spring 2015 to +8 in Fall 2015, a change of -20 IIS), followed by the finance/insurance/real estate (change of -17 IIS), and accommodations/food/entertainment/recreation (change of -16 IIS).

<sup>6</sup> In fact, this is the sector that has seen the most movement over the past several years with expectations frequently changing from positive to negative, and vice versa.

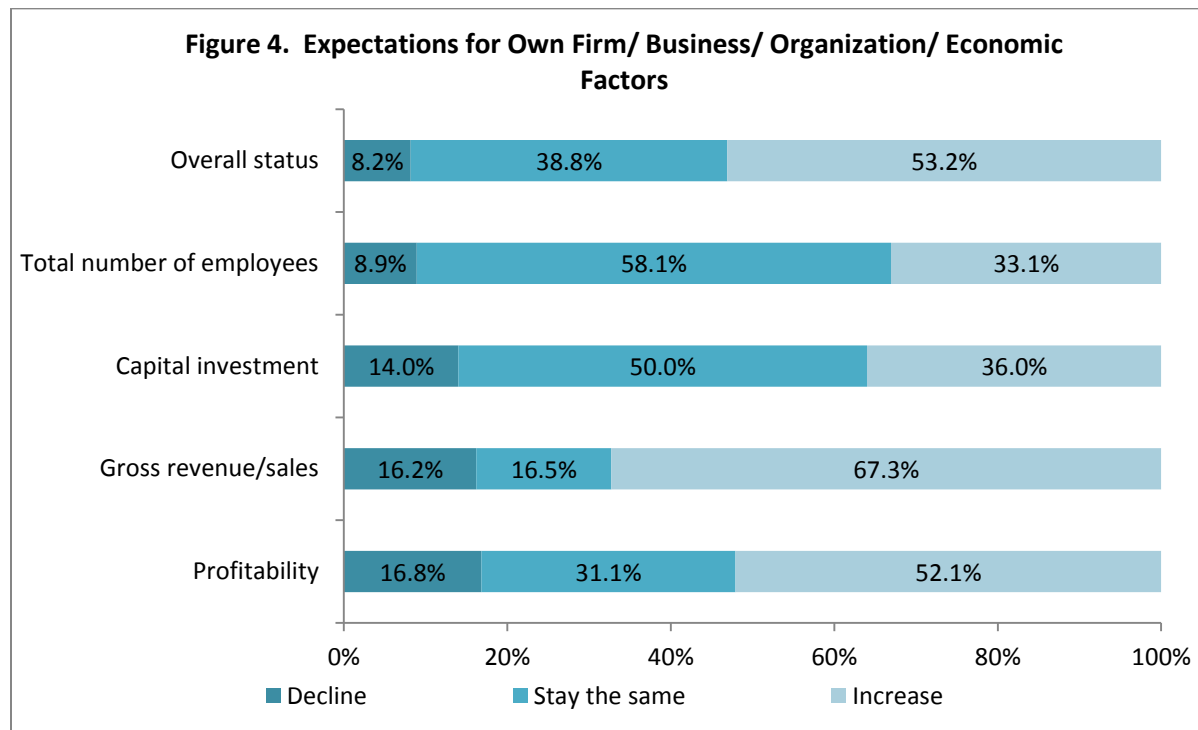


## Overall Expectations for “Your” Firm/ Organization

The Fall 2015 survey indicates that expectations for individual businesses/ firms/ organizations over the next 12 months are less positive than the Spring 2015 results (see Table 5), but still overwhelmingly positive. Respondents expect growth in all economic aspects of their own firm/ business/ organization, with gross revenue/ sales (IIS of +29) and overall status (IIS of +25) receiving the most positive ratings.

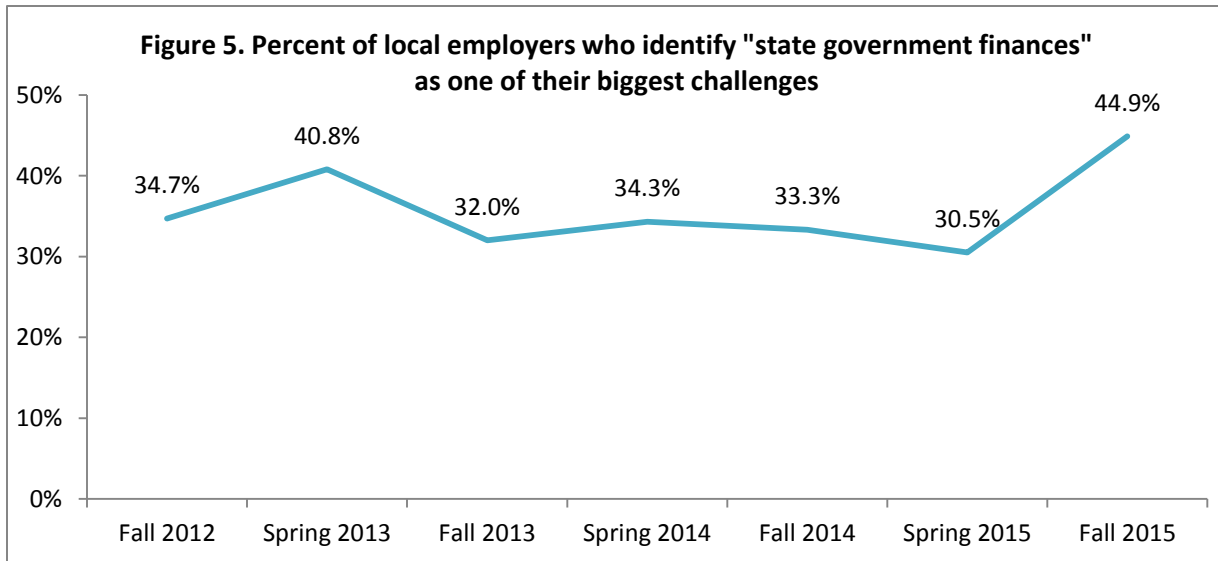
Table 5. Intensity Index Scores for own firm/ business/ organization expectations			
	Fall 2015 IIS	Spring 2015 IIS	Difference (Fall 2015-Spring 2015)
Capital investment	+13	+16	-3
Total number of employees	+13	+16	-3
Gross revenue/ sales	+29	+37	-8
Profitability	+20	+27	-7
Overall status	+25	+33	-8

As seen in figure 4, a majority of respondents report an expected increase on three out of five measures (profitability, overall status, and gross revenue/ sales). This is despite the fact that 17 percent of respondents expect a decline in their profitability over the next twelve months and 16 percent expect a decline in their gross revenue/sales. In addition, the majority of local employers report that their total number of employees over the next twelve months will stay the same (58.1 percent) as well as capital investment in their firm (50.0 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, state government finances weigh the heaviest on the minds of local area respondents. Of the 263 employers who responded to this survey, 44.9 percent (n=118) report that state government finances is going to be one of the biggest challenges facing them in the next 12 months. This is the first time that state government finances has topped the list of challenges and indicates a 14 percentage point increase since Spring 2015.



The second biggest challenge facing local employers is government regulations and taxation, which is one of the subjects further examined in this year's topical section (see page 11). Employers also report concerns with the availability of skilled/trained workers (33.1 percent) and competition from local/state/national firms (29.3 percent). Providing healthcare for employees (including the implementation of the Affordable Care Act)<sup>7</sup> is one area in which employers are no longer ranking it at the top of the list of concerns. In Spring 2014, 41.8 percent of employers reported that providing healthcare for their employees was going to be one of their biggest concerns. On year later, this had decreased 17 percentage points to 24.1 percent in Spring 2015. The most recent survey finds that the percent of respondents who report that healthcare for employees is one of their biggest challenges remained stable at 25.1 percent.

<sup>7</sup> The Sangamon County Economic Outlook Survey has included "healthcare for employees, Affordable Care Act" as a pre-identified challenge since Spring 2014.

	<b>Number of responses</b>	<b>Valid Percent</b>
State government finances	118	44.9%
Government regulations and taxation	97	36.9%
Availability of skilled/ trained workers	87	33.1%
Competition from local/ state/ national firms	77	29.3%
Healthcare for employees (e.g., Affordable Care Act)	66	25.1%
Consumer confidence/ spending	64	24.3%
Employee (union and nonunion) compensation and benefits (not healthcare)	41	15.6%
Commodity prices	35	13.3%
Interest rates	26	9.9%
Inflation	22	8.4%
Energy prices	21	8.0%
Global competition	12	4.6%

It is important to note that none of the challenges received a plurality 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). In previous surveys, all three types of employers reported that government regulations and taxation is one of their biggest challenges, yet non-profit and public sector respondents reported this as at a lower rate than private sector respondents.<sup>8</sup> In addition, in previous surveys, a higher percentage of non-profit employers and public sector employers, than those in the private sector, reported that the state government finances is one of their biggest challenges. This year is the first iteration of the survey where a plurality of all employer types (non-profit, public, and private) report that state government finances is one of their biggest challenges.

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<sup>8</sup> It is important to note that fewer non-profit and public sector employers participate in the survey.

## The Fall 2015 Topical Section

The Fall 2015 topical section examines three separate, yet connected, topics:

- The effect of the state budget impasse on local organizations;
- attitudes towards government regulations and the effect they have on doing business in Sangamon County;
- and, general awareness and attitudes towards the growing sharing economy.

### *State Budget Impasse*

In an effort to gauge how the current state budget impasse is affecting the local economy, the Fall 2015 SCEOS includes questions examining this issue. Respondents were asked about the type of effect (large negative, small negative, neutral, small positive, or large positive) the state budget impasse is having on seven different aspects of their organization or firm: gross revenue/sales, profitability, on-hand cash, potential hiring, capital investment, total number of employees, and overall firm status. As seen in table 7, more than half of respondents report that the current state budget impasse is having a negative effect on their organization’s gross revenue/sales (53.8 percent) and profitability (51.0 percent). In addition, 46.1 percent of all employers in Sangamon County report that the state budget impasse is having a negative effect on the overall status of their firm.

<b>Table 7. The Effect of the State Budget Impasse on Local Businesses/Firms/Organizations</b>			
	Negative Effect	No Effect	Positive Effect
Gross revenue/sales	53.8%	41.8%	4.6%
Profitability	51.0%	44.7%	4.3%
Overall status of your firm	46.1%	49.2%	4.6%
On-hand cash/ accounts receivable	40.2%	57.9%	1.9%
Potential hiring in organization	38.5%	59.6%	1.9%
Capital investment in firm	38.1%	59.9%	1.9%
Total number of employees	26.0%	73.3%	0.8%

When asked, “is there any other way that the budget impasse has impacted your firm,” respondents mainly speak about consumer confidence and uncertainty, the lack of funds they are receiving from the state government, and the stress it is putting on both employers and employees. Responses differ slightly between employers from different economic sectors.

For example, a private sector respondent stated that: “Consumer confidence in the economy is the largest problem for my firm. If the governor is able to accomplish [it], then it might be better for Illinois’ in the long term. People are afraid that they are going to lose their job therefore they are not spending any money.”

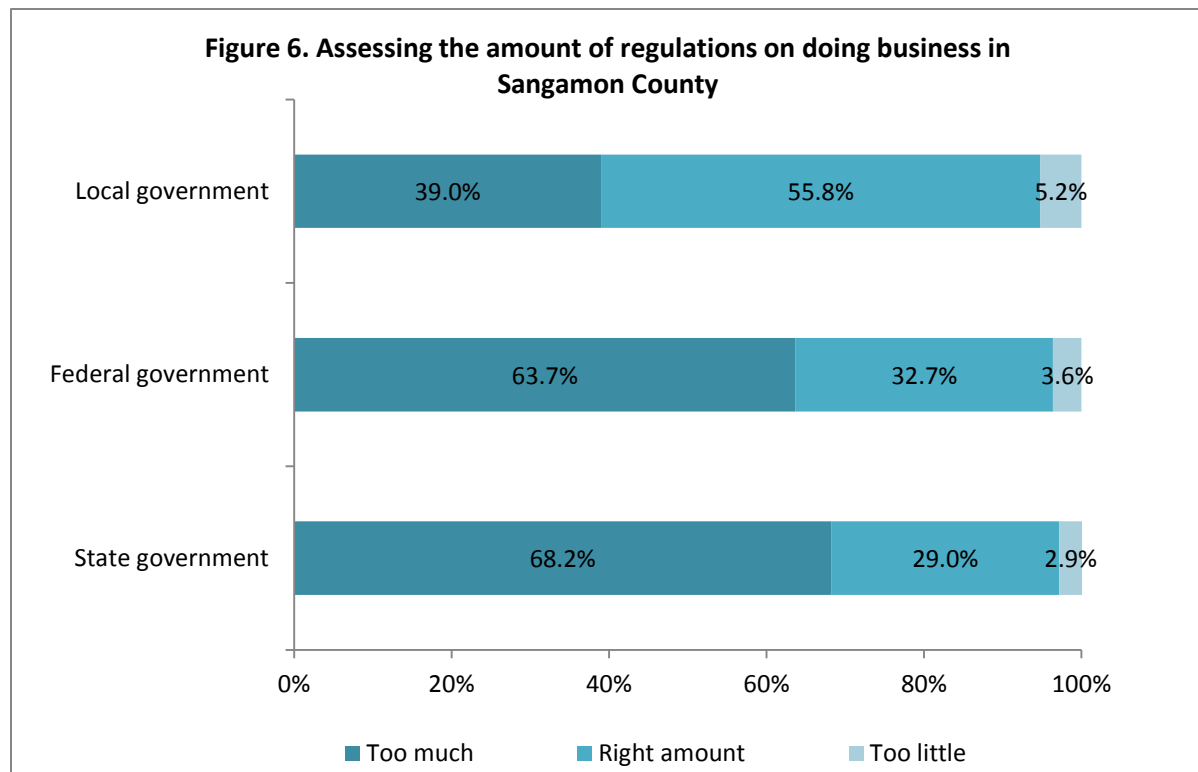
Another respondent from the non-profit sector reported, “It has reduced our ability to serve children. It has increased the community’s need for support but decreased our ability to meet that need.”

Finally, a public sector respondent stated, the “impasse has stopped state employees from traveling to the capitol.”

### Government Regulations

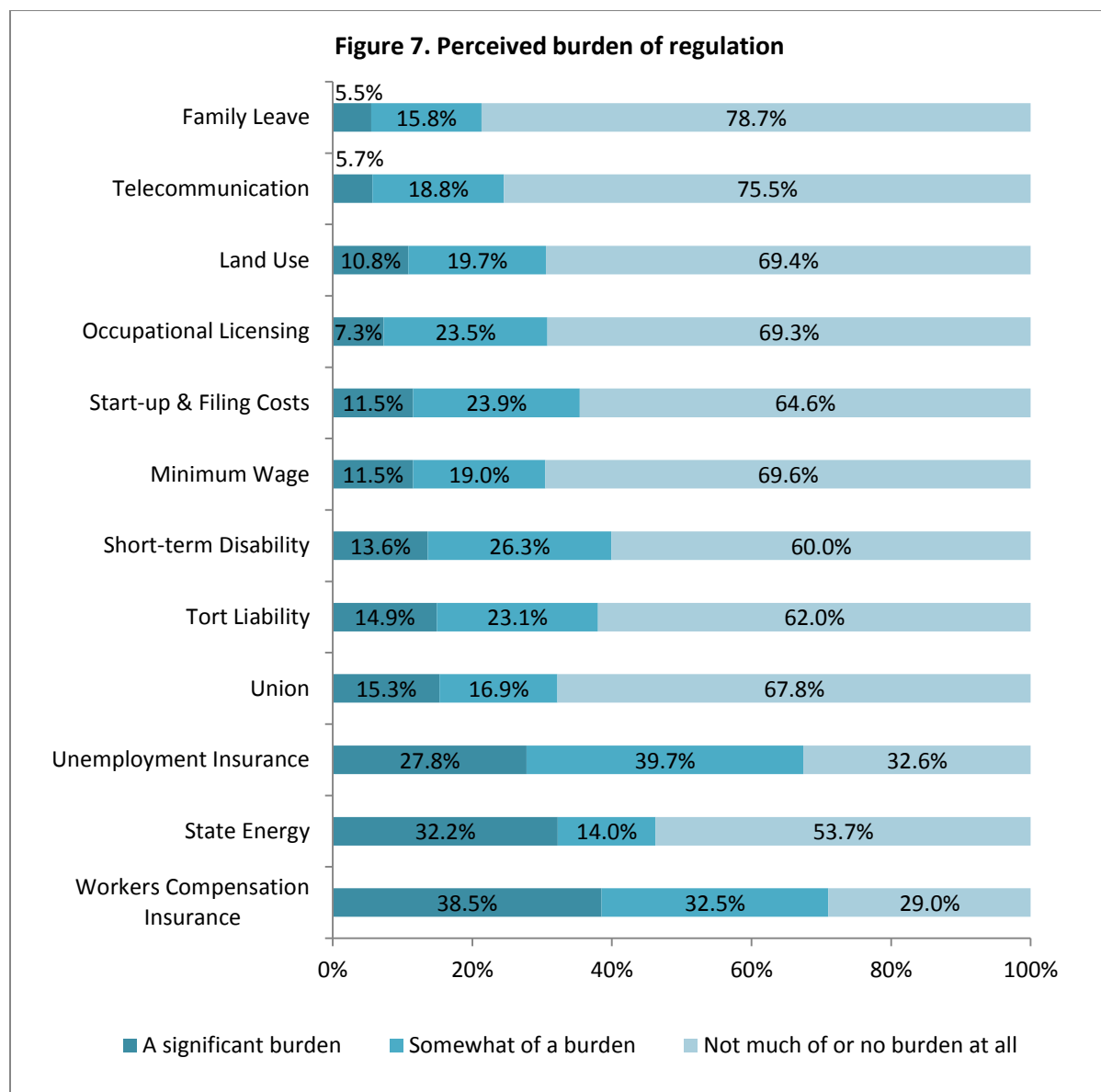
One of the most consistent findings of the Sangamon County Economic Outlook Survey over the past seven years has been the prevalence of “government regulations and taxation” topping the list of biggest challenges facing Sangamon County businesses/firms/organizations. In an effort to further examine what are the biggest regulatory burdens on local employers, the Fall 2015 SCEOS includes questions about federal, state, and local regulations.

Overall, a higher percentage of respondents report that there is “too much” regulation by the State government and, to a lesser extent, by the Federal Government, compared to local governments. Sixty-eight percent of respondents report that there is “too much” government regulation by the State government, compared to 63.7 percent who report that there is “too much” regulation by the Federal Government, and 39.0 percent who report that there is “too much” regulation by the local government (see figure 6).



Respondents had a difficult time quantifying the amount of money that their businesses spend on regulatory compliance each year with 134 respondents responding that they “did not know.” Of those who did respond, 26.5 percent report that they spend \$1,500 or less, 24.6 percent report sending between \$1,501 and \$5,000, 24.1 percent report spending between \$5,001 and \$25,000, and 24.8 percent report spending more than \$25,000 a year on regulatory compliance. Overall, respondents from the construction sector report the largest amount of money spent on regulations each year, with median amount of \$73,500; yet, it is important to note that due to small sample sizes within each of the different economic sectors, we are unable to determine any meaningful differences.

In July 2015, Dr. Wayne Winegarden of the Pacific Research Institute released a report titled, “The 50-state Small Business Regulation Index.” This report includes an index of 14 different regulatory components and provides a rating of level of burden for small businesses within each state. Put another way, for each of the regulations, states are ranked from “1” which indicates least burdensome and “50” which indicates most burdensome state. The advisory committee of the Sangamon County Economic Outlook Survey chose the twelve regulations most relevant to Sangamon County organizations and asked respondents to report whether this regulation was a “significant burden,” “somewhat of a burden,” “not much of a burden,” or “not a burden at all.” For the sake of simplicity, Figure 7 below presents the findings of these questions but combines the two categories representing “not much” or “not a burden.” As you can see in the figure, Sangamon County organizations report that the most burdensome regulation in terms of being a “significant burden” on doing business in Sangamon County are workers compensation insurance, state energy regulations, and unemployment insurance.



When we compare the perceived burden of these regulations to the PRI's Burdensome Index<sup>9</sup>, we find some correlation. Table 8 below presents the list of regulations provided to the survey respondents, how the respondents ranked this burden, and how Illinois ranks in the Burdensome Index (out of 50 states, with higher values indicating higher levels of burden). As you can see in the table, according to the PRI Index, Illinois has a higher ranking of burden when it comes to state tort liability environment and state start-up and annual filing regulatory burdens, yet these were not the items that were ranked as most burdensome by Sangamon County organizations.

	<b>Percent who report it is a significant burden</b>	<b>Percent who report it is somewhat of a burden</b>	<b>Ranking on PRI's Burdensome Index</b>
Workers Compensation Insurance	38.5%	32.5%	44
Unemployment Insurance	27.8%	39.7%	39
Union	15.3%	16.9%	41
Tort Liability	14.9%	23.1%	46
Short-term Disability	13.6%	26.3%	1 <sup>10</sup>
Minimum Wage	11.5%	19.0%	39
Start-up & Filing Costs	11.5%	23.9%	45
Land Use	10.8%	19.7%	26
State Energy	7.4%	24.8%	31
Occupational Licensing	7.3%	23.5%	30
Telecommunication	5.7%	18.8%	30
Family Leave	5.5%	15.8%	32

In addition, respondents were asked to identify the most burdensome regulation that affects their organization. Researchers from the University of Illinois Springfield's Survey Research Office qualitatively coded these open-ended responses into categories<sup>11</sup> and found that the majority of respondents reported that workers compensation regulations and regulations dealing with business taxes were the most burdensome for their organization. To see a complete list of the open-ended responses, check out the topline report at the end of this report.

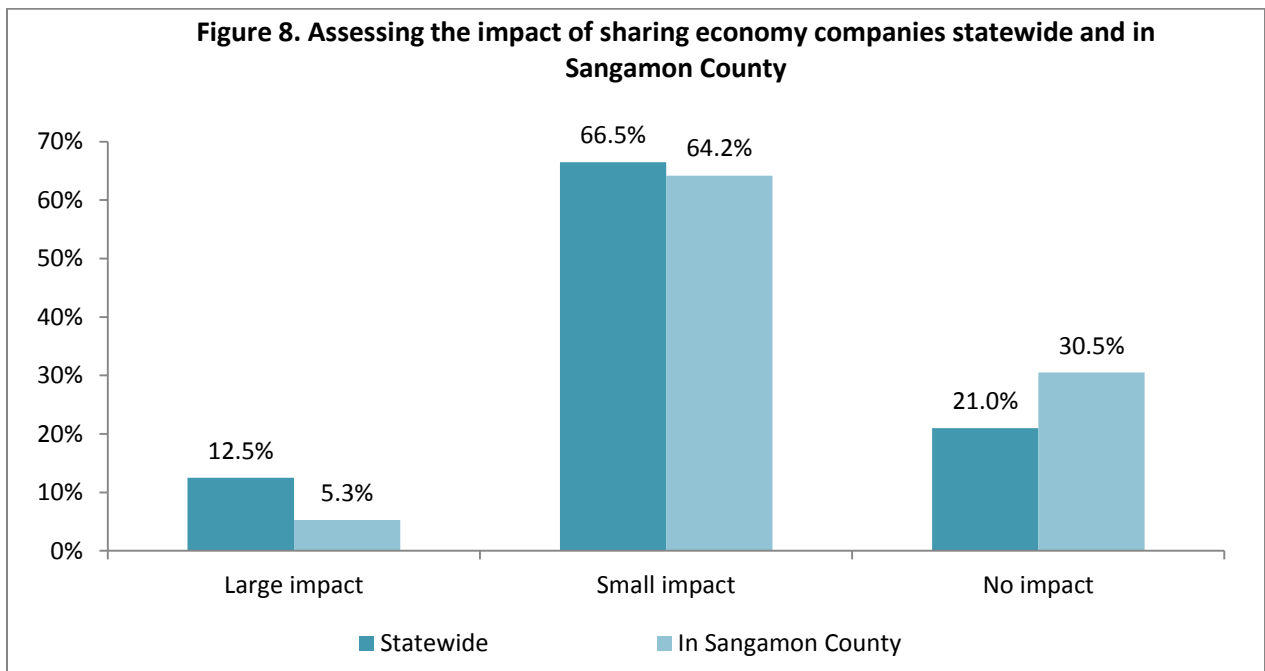
<sup>9</sup> A complete copy of this report is available at [https://www.pacificresearch.org/fileadmin/images/Studies\\_2015/SmBusinessIndex\\_UpdatedVersion2\\_web.pdf](https://www.pacificresearch.org/fileadmin/images/Studies_2015/SmBusinessIndex_UpdatedVersion2_web.pdf)

<sup>10</sup> It is important to note that Illinois is ranked #1 in this category by PRI due to the fact that the state does not require companies to offer short-term disability.

<sup>11</sup> Intercoder reliability was assessed using Cohen's Kappa and it was above the necessary .6 level.

## Sharing Economy

The final set of questions in the Fall 2015 topical section examines attitudes towards companies that offer labor and services to individuals on demand, outside of corporate influence, who are frequently referred to as part of the “sharing economy,” (e.g., *Uber* and *AirBnB*). Eighty-four percent of Sangamon County employers report that they have heard of companies which are part of the sharing economy, but only 12.5 percent report that they believe these companies are having a large impact on regular businesses in Illinois and 5.3 percent believe they are having a large impact on businesses in Sangamon County. As seen in figure 8, the majority of respondents report that these companies are currently having a small impact in both Sangamon County and statewide (64.2 percent and 66.5 percent, respectively).



One of the reason why Sangamon County organizations do not seem to think that sharing economy companies are having a large impact is the fact that only 13.0 percent of respondents report that they know of competitors within their sector who utilize the sharing economy model. In addition, less than 3 percent of respondents report that they feel threatened “a lot” by the entry of any existing or potential competitors in their sector who utilize the sharing economy model. Despite this, one-fourth of respondents (24.2 percent) report that there should be more government regulations on these types of businesses.



## Transparency Initiative Methodological Report



In 2015, the UIS Survey Research Office (SRO) became a charter member of the American Association for Public Opinions Research's Transparency Initiative (TI). By joining the TI, the SRO is supporting broader and more effective disclosure of research methods by all organizations. The Transparency Initiative provides formal public recognition by AAPOR of an organization's voluntary commitment to abide by the disclosure standards in the AAPOR Code of Professional Ethics and Practices, while benefiting the public by providing more information with which to evaluate the quality of individual surveys. As part of SRO's continued investment in this initiative, it has committed to providing a detailed methodological report of all of its survey projects. For more information on the TI, please visit <http://www.aapor.org/AAPORKentico/Transparency-Initiative.aspx>.

### Sangamon County Economic Outlook Survey

The project is sponsored by the Greater Springfield Chamber of Commerce with a contribution from the University of Illinois Springfield's Chancellor's Office. It was conducted by researchers at the University of Illinois Springfield's Survey Research Office. A steering committee assisted with questionnaire development (comprised of University and Chamber representatives). The topline report includes actual question wording and frequencies for each answer category as well as all open-ended responses.

### Sample and Methodology

A list of local firms and organizations to be included in the Spring 2015 Sangamon County Economic Outlook Survey was generated by combining previous survey samples as well as the most recent list of Greater Springfield Chamber of Commerce members. By combining these two sources of business data, the Survey Research Office was able to identify 1421 local businesses, firms, or organizations. The SRO sent introductory letters to all of these entities on September 22, 2015 explaining the purpose of the project and informing them that they would be contacted via telephone to participate. Telephone interviews began on September 28, 2015 and concluded on October 15, 2015. Interviewers asked for the primary contact for the organization but were also trained to ask to speak to any individual within the organization helps with the financial planning. Sample members were contacted between the hours of 9am and 5pm, Monday through Friday. All respondents were contacted at least once with the average number of attempted phone calls of 4.3. The maximum number of attempts for a respondent is 10 attempts.

Of the 1421 possible respondents, 118 never answered the telephone, 46 were no longer operating in Sangamon County, and 82 were either wrong numbers or disconnected numbers. Two hundred and ten organizations refused to participate in the survey and 677 organizations were never able to coordinate a time to complete the interview. Overall, 263 organizations completed the telephone survey- which lasted, on average, 20 minutes. The response rate for this project is 20.7 percent (AAPOR Response Rate 3 which includes estimate proportion of cases of unknown eligibility that are eligible) and the cooperation rate for this project is 56 percent. The refusal rate is 16.5 percent. The margin of error for this project is plus or minus 5.4 percentage points. When examining subgroups of data respondents, the margin of error will increase. Margins of error for this survey are not adjusted for design effect. In addition, the data is not weighted.

For more information on this study, please contact SRO Director, Dr. Ashley Kirzinger at [akirz2@uis.edu](mailto:akirz2@uis.edu), or 217-206-6591.

## Sangamon County Economic Outlook Survey Topline Report

(N=263)

### 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: -1.4)

	Valid percent(n)
Large decline	3.1% (8)
Small decline	25.0% (65)
Stay the same	43.5% (113)
Small increase	28.5% (74)
Large increase	0% (0)
Don't know	(2)
Refused	(1)

#### Capital investment (Intensity index score: -2.0)

	Valid percent(n)
Large decline	4.0% (10)
Small decline	24.1% (60)
Stay the same	45.4% (113)
Small increase	24.9% (62)
Large increase	1.6% (4)
Don't know	(13)
Refused	(1)

#### Interest rates (Intensity index score: +29.4)

	Valid percent (n)
Large decline	0% (0)
Small decline	1.6% (4)
Stay the same	40.8% (104)
Small increase	54.9% (140)
Large increase	2.7% (7)
Don't know	(8)
Refused	(0)

Gross sales/revenue (Intensity index score: +11.1)

	Valid percent(n)
Large decline	2.3% (6)
Small decline	19.5% (50)
Stay the same	35.0% (90)
Small increase	40.1% (103)
Large increase	3.1% (8)
Don't know	(6)
Refused	(0)

Inflation/price of goods (Intensity index score: +31.2)

	Valid percent(n)
Large decline	0.8% (2)
Small decline	0.8% (2)
Stay the same	38.0% (100)
Small increase	56.3% (148)
Large increase	4.2% (11)
Don't know	(0)
Refused	(0)

Contributions to non-profits (Intensity index score: -7.8)

	Valid percent(n)
Large decline	4.7% (12)
Small decline	24.9% (64)
Stay the same	52.5% (135)
Small increase	17.1% (44)
Large increase	0.8% (2)
Don't know	(5)
Refused	(1)

The overall economy (Intensity index score: +.3)

	Valid percent(n)
Large decline	3.1% (8)
Small decline	26.7% (70)
Stay the same	35.9% (94)
Small increase	34.4% (90)
Large increase	0% (0)
Don't know	(1)
Refused	(0)

## 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: +8.4)

	Valid percent( <i>n</i> )
Large decline	1.6% (3)
Small decline	22.7% (57)
Stay the same	35.5% (89)
Small increase	37.8% (95)
Large increase	2.4% (6)
Don't know	(12)
Refused	(0)

### Manufacturing (Intensity index score: -13.5)

	Valid percent( <i>n</i> )
Large decline	4.4% (11)
Small decline	26.7% (67)
Stay the same	61.4% (154)
Small increase	6.8% (17)
Large increase	0.8% (2)
Don't know	(11)
Refused	(1)

### Wholesale trade (Intensity index score: +2.0)

	Valid percent( <i>n</i> )
Large decline	0.8% (2)
Small decline	14.8% (36)
Stay the same	64.8% (158)
Small increase	18.9% (46)
Large increase	0.8% (2)
Don't know	(18)
Refused	(1)

### Retail trade (Intensity index score: +11.5)

	Valid percent( <i>n</i> )
Large decline	1.9% (5)
Small decline	18.5% (48)
Stay the same	35.8% (93)

Small increase	42.3% (110)
Large increase	1.5% (4)
Don't know	(3)
Refused	(0)

Transportation/ warehousing (Intensity index score: +5.9)

	Valid percent(n)
Large decline	0.8% (2)
Small decline	15.0% (37)
Stay the same	58.9% (145)
Small increase	22.0% (54)
Large increase	3.3% (8)
Don't know	(16)
Refused	(1)

Finance/insurance/real estate (Intensity index score: +16.5)

	Valid percent(n)
Large decline	1.2% (3)
Small decline	15.8% (41)
Stay the same	35.0% (91)
Small increase	45.0% (117)
Large increase	3.1% (8)
Don't know	(3)
Refused	(0)

Medical/health care (Intensity index score: +52.3)

	Valid percent(n)
Large decline	0.8% (2)
Small decline	2.3% (6)
Stay the same	12.3% (32)
Small increase	60.8% (158)
Large increase	23.8% (62)
Don't know	(2)
Refused	(1)

Education/ educational services (Intensity index score: +1.4)

	Valid percent(n)
Large decline	2.3% (6)
Small decline	21.3% (55)
Stay the same	49.2% (127)
Small increase	25.6% (66)

Large increase	1.6% (4)
Don't know	(4)
Refused	(1)

Accommodations/food/entertainment/recreation (Intensity index score: +4.6)

	Valid percent(n)
Large decline	1.9% (5)
Small decline	18.4% (48)
Stay the same	49.8% (130)
Small increase	28.4% (74)
Large increase	1.5% (4)
Don't know	(2)
Refused	(0)

Information and communications systems (Intensity index score: + 22.7)

	Valid percent(n)
Large decline	0.8% (2)
Small decline	4.3% (11)
Stay the same	48.8% (125)
Small increase	41.0% (105)
Large increase	5.1% (13)
Don't know	(7)
Refused	(0)

Business and professional support services (Intensity index score: +5.1)

	Valid percent(n)
Large decline	0.8% (2)
Small decline	16.0% (41)
Stay the same	57.0% (146)
Small increase	24.6% (63)
Large increase	1.6% (4)
Don't know	(7)
Refused	(0)

Personal services (Intensity index score: +3.5)

	Valid percent(n)
Large decline	2.8% (7)
Small decline	17.0% (43)
Stay the same	51.8% (131)
Small increase	27.3% (69)

Large increase	1.2% (3)
Don't know	(10)
Refused	(0)

Natural resources and mining (Intensity index score:-21.1)

	Valid percent(n)
Large decline	9.2% (22)
Small decline	35.6% (85)
Stay the same	44.8% (107)
Small increase	9.2% (22)
Large increase	1.3% (3)
Don't know	(23)
Refused	(1)

Public administration (Intensity index score:-9.3)

	Valid percent(n)
Large decline	6.0% (15)
Small decline	28.2% (71)
Stay the same	48.0% (121)
Small increase	14.3% (36)
Large increase	3.6% (9)
Don't know	(10)
Refused	(1)

Which of the above economic sectors best describes your firm's primary economic activity (Intensity index score for own sector: +11.7)

	Valid percent(n)
Construction	11.8% (31)
Manufacturing	0.8% (2)
Wholesale trade	2.7% (7)
Retail trade	15.2% (40)
Transportation/warehousing	2.3% (6)
Finance/insurance/real estate	13.7% (36)
Medical/health care	7.2% (19)
Education/educational services	5.7% (15)
Accommodations/food/entertainment/recreation	6.8% (18)
Information and communication systems	4.2% (11)
Business and professional support services	16.3% (43)
Personal services	8.0% (21)
Natural resources and mining	1.9% (5)
Public administration	3.4% (9)



### 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: +12.5)

	Valid percent(n)
Large decline	2.3% (6)
Small decline	11.7% (30)
Stay the same	50.0% (128)
Small increase	30.5% (78)
Large increase	5.5% (14)
Don't know	(7)
Refused	(0)

#### Total number of employees (Intensity index score +12.9)

	Valid percent(n)
Large decline	0.4% (1)
Small decline	8.5% (22)
Stay the same	58.1% (151)
Small increase	31.2% (81)
Large increase	1.9% (5)
Don't know	(3)
Refused	(0)

#### Gross revenue/sales (Intensity index score: +28.9)

	Valid percent(n)
Large decline	1.2% (3)
Small decline	15.0% (38)
Stay the same	16.5% (42)
Small increase	59.4% (151)
Large increase	7.9% (20)
Don't know	(8)
Refused	(1)

#### Profitability (Intensity index score: +20.2)

	Valid percent(n)
Large decline	1.6% (4)
Small decline	15.2% (39)
Stay the same	31.1% (80)

Small increase	45.5% (117)
Large increase	6.6% (17)
Don't know	(4)
Refused	(2)

Overall status (Intensity index score: +25.4)

	Valid percent(n)
Large decline	0.4% (1)
Small decline	7.8% (20)
Stay the same	38.8% (100)
Small increase	46.9% (121)
Large increase	6.2% (16)
Don't know	(4)
Refused	(1)

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

	Number of responses
State government finances	118
Government regulations and taxation	97
Availability of skilled/ trained workers	87
Competition from local/ state/ national firms	77
Healthcare for employees (e.g., Affordable Care Act)	66
Consumer confidence/ spending	64
Employee (union and nonunion) compensation and benefits (not healthcare)	41
Commodity prices	35
Interest rates	26
Inflation	22
Energy prices	21
Global competition	12

**Section 4:**

*This section is the topical portion of the survey and changes during each survey administration.*

The State of Illinois has been operating without a budget for fiscal year 2016. We are interested in the effect, if any, this impasse has on your organization. Please let us know if the budget impasse has had a large negative effect, small negative effect, no effect, a small positive effect, or a large positive effect on the following aspects of your business?

**Capital investment in firm**

	Valid percent(n)
Large negative effect	16.7% (43)
Small negative effect	21.4% (55)
No effect	59.9% (154)
Small positive effect	1.9% (5)
Large positive effect	0% (0)
Don't know	(6)
Refused	(0)

**Total number of employees**

	Valid percent(n)
Large negative effect	7.3% (19)
Small negative effect	18.7% (49)
No effect	73.3% (192)
Small positive effect	0.8% (2)
Large positive effect	0% (0)
Don't know	(1)
Refused	(0)

**Potential hiring in organization**

	Valid percent(n)
Large negative effect	13.1% (34)
Small negative effect	25.4% (66)
No effect	59.6% (155)
Small positive effect	1.9% (5)
Large positive effect	0% (0)
Don't know	(3)
Refused	(0)

Gross revenue/sales

	Valid percent( <i>n</i> )
Large negative effect	16.9% (44)
Small negative effect	36.9% (96)
No effect	41.5% (108)
Small positive effect	3.8% (10)
Large positive effect	0.8% (2)
Don't know	(3)
Refused	(0)

Profitability

	Valid percent( <i>n</i> )
Large negative effect	15.2% (39)
Small negative effect	35.8% (92)
No effect	44.7% (115)
Small positive effect	3.9% (10)
Large positive effect	0.4% (1)
Don't know	(5)
Refused	(1)

Your organization's on-hand cash/accounts receivable

	Valid percent( <i>n</i> )
Large negative effect	12.4% (32)
Small negative effect	27.8% (72)
No effect	57.9% (150)
Small positive effect	1.5% (4)
Large positive effect	0.4% (1)
Don't know	(3)
Refused	(1)

Overall status of your firm

	Valid percent( <i>n</i> )
Large negative effect	9.6% (25)
Small negative effect	36.5% (95)
No effect	49.2% (128)
Small positive effect	3.8% (10)
Large positive effect	0.8% (2)
Don't know	(2)
Refused	(1)

The next set of questions asks about government regulations on doing business in Sangamon County. Questions will deal with regulations at the federal, state, and local level.

In general, do you think there is too much, too little, or about the right amount of regulation by the Federal Government?

	Valid percent( <i>n</i> )
Too much	63.7% (158)
Too little	3.6% (9)
Right amount	32.7% (81)
Don't know	(11)
Refused	(4)

Is there too much, too little, or about the right amount of government regulation by the State government?

	Valid percent( <i>n</i> )
Too much	68.2% (167)
Too little	2.9% (7)
Right amount	29.0% (71)
Don't know	(14)
Refused	(4)

Is there too much, too little, or about the right amount of government regulation by the local government?

	Valid percent( <i>n</i> )
Too much	39.0% (97)
Too little	5.2% (13)
Right amount	55.8% (139)
Don't know	(11)
Refused	(3)

How much of a burden, if at all, are the following regulations on the cost of doing business in Sangamon County?

Workers Compensation Insurance

	Valid percent( <i>n</i> )
A significant burden	38.5% (97)
Somewhat of a burden	32.5% (82)
Not much of a burden	15.9% (40)
Not a burden at all	13.1% (33)
Don't know	(10)
Refused	(1)

### Unemployment Insurance Programs

	Valid percent( <i>n</i> )
A significant burden	27.8% (70)
Somewhat of a burden	39.7% (100)
Not much of a burden	17.9% (45)
Not a burden at all	14.7% (37)
Don't know	(11)
Refused	(0)

### Short-term Disability Insurance Requirements

	Valid percent( <i>n</i> )
A significant burden	13.6% (33)
Somewhat of a burden	26.3% (64)
Not much of a burden	23.0% (56)
Not a burden at all	37.0% (90)
Don't know	(20)
Refused	(0)

### Minimum Wage Regulations

	Valid percent( <i>n</i> )
A significant burden	11.5% (29)
Somewhat of a burden	19.0% (48)
Not much of a burden	20.2% (51)
Not a burden at all	49.4% (125)
Don't know	(10)
Refused	(0)

### Family Leave Regulations

	Valid percent( <i>n</i> )
A significant burden	5.5% (14)
Somewhat of a burden	15.8% (40)
Not much of a burden	17.0% (430)
Not a burden at all	61.7% (156)
Don't know	(10)
Refused	(0)

### Union Regulations

	Valid percent( <i>n</i> )
A significant burden	15.3% (38)
Somewhat of a burden	16.9% (42)

Not much of a burden	8.5% (21)
Not a burden at all	59.3% (147)
Don't know	(15)
Refused	(0)

#### Occupational Licensing Rules

	Valid percent(n)
A significant burden	7.3% (18)
Somewhat of a burden	23.5% (58)
Not much of a burden	15.0% (37)
Not a burden at all	54.3% (134)
Don't know	(16)
Refused	(0)

#### Land Use Regulations

	Valid percent(n)
A significant burden	10.8% (27)
Somewhat of a burden	19.7% (49)
Not much of a burden	11.2% (28)
Not a burden at all	58.2% (145)
Don't know	(13)
Refused	(1)

#### State Energy Regulations

	Valid percent(n)
A significant burden	7.4% (18)
Somewhat of a burden	24.8% (60)
Not much of a burden	14.0% (34)
Not a burden at all	53.7% (130)
Don't know	(20)
Refused	(1)

#### Tort Liability Environment

	Valid percent(n)
A significant burden	14.9% (36)
Somewhat of a burden	23.1% (56)
Not much of a burden	14.9% (36)
Not a burden at all	47.1% (114)
Don't know	(19)
Refused	(2)

### Telecommunication Regulations

	Valid percent( <i>n</i> )
A significant burden	5.7% (14)
Somewhat of a burden	18.8% (46)
Not much of a burden	19.6% (48)
Not a burden at all	55.9% (137)
Don't know	(17)
Refused	(1)

### Start-up & Filing Costs

	Valid percent( <i>n</i> )
A significant burden	11.5% (28)
Somewhat of a burden	23.9% (58)
Not much of a burden	21.0% (51)
Not a burden at all	43.6% (106)
Don't know	(19)
Refused	(1)

### And how much do you think your business spends on regulatory compliance each year?

	Valid percent( <i>n</i> )
Less than \$500	13.9% (19)
\$501-\$1500	12.6% (16)
\$1501-\$5000	24.6% (35)
\$5001-\$25,000	24.1% (34)
\$25,001-\$100,000	15.3% (21)
More than \$100,000	9.5% (13)
Don't know	(134)
Refused	(5)



In recent years, companies like Uber and Airbnb (PRONOUNCED Air-B-N-B), have started doing business in Sangamon County. These companies, which offer labor and services to individuals on demand, outside of corporate influence, are referred to as part of the “sharing economy.”

Prior to today, have you heard of either Uber or Air-BNB or the term “sharing economy?”

	Valid percent(n)
Yes	84.4% (222)
No	15.6% (41)
Don't know	(0)
Refused	(0)

And how much of an impact, if any, do you think that the sharing economy is having on regular businesses in Illinois? A large impact, a small impact, or no impact?

Once again, this is about the impact on regular businesses throughout Illinois.

	Valid percent(n)
Large impact	12.5% (28)
Small impact	66.5% (149)
No impact	21.0% (47)
Don't know	(39)
Refused	(0)

And how about on regular businesses in Sangamon County? Do you think that the sharing economy is having a large impact, small impact, or no impact on regular businesses here in Sangamon County?

	Valid percent(n)
Large impact	5.3% (12)
Small impact	64.2% (145)
No impact	30.5 (69)
Don't know	(37)
Refused	(0)

As far as you know, are there competitors in your sector who utilize the sharing economy model?

	Valid percent(n)
Yes	13.0% (28)
No	87.0% (188)
Don't know	(47)
Refused	(0)

How much do you feel threatened, if at all, by the entry of any existing or potential competitors in your sector who utilize the sharing economy model?

	Valid percent(n)
A lot	2.9% (7)
Some	8.3% (20)
A little	13.7% (33)
Not at all	75.1% (181)
Don't know	(22)
Refused	(0)

And when thinking about businesses in the sharing economy, do you think there should more governmental regulation on these businesses, less governmental regulations on these businesses, or is there currently the right amount of governmental regulations on these businesses?

	Valid percent(n)
There should be more regulations	24.2% (54)
There should be less regulations	29.1% (65)
The right amount of regulations	46.6% (104)
Don't know	(39)
Refused	(1)

Does your organization have a website?

	Valid percent(n)
Yes	93.0% (244)
No	7.0% (18)
Don't know	(0)
Refused	(1)

Does your organization have a social media page (Facebook Twitter Instagram)?

	Valid percent(n)
Yes	73.8% (193)
No	26.2% (68)
Don't know	(1)
Refused	(1)

## 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)	70.5% (185)
Non-profit sector	15.8% (41)
Public sector (government)	13.7% (35)
Don't know	(2)
Refused	(0)

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

	Valid percent(n)
2 years or less	12.7% (3#)
3-5 years	15.8% (41)
6-10 years	16.2% (42)
11-20 years	18.1% (47)
21-30 years	15.4% (40)
31-40 years	8.5% (22)
41- 50 years	4.6% (12)
More than 50 years	8.5% (22)

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

	Valid percent(n)
2 years or less	7.7% (20)
3-5 years	10.8% (28)
6-10 years	13.1% (34)
11-20 years	15.8% (41)
21-30 years	15.8% (41)
31-40 years	15.0% (39)
41- 50 years	6.9% (18)
More than 50 years	15.0% (39)

How many years has your organization been operating in Illinois:

	Valid percent(n)
2 years or less	5.8% (15)
3-5 years	7.7% (20)
6-10 years	10.0% (26)
11-20 years	14.7% (38)
21-30 years	17.8% (46)
31-40 years	15.1% (39)

41- 50 years	7.7% (20)
More than 50 years	21.2% (55)

Number of total full-time employees:

	Valid percent( <i>n</i> )
Less than 5	40.1% (103)
5-14 employees	30.7% (79)
15-29 employees	11.7% (30)
30-44 employees	3.5% (9)
45-59 employees	2.7% (7)
60-79 employees	1.2% (3)
80-99 employees	1.2% (3)
100-149 employees	2.7% (7)
150-299 employees	3.1% (8)
300 or more employees	3.1% (8)
Don't know	(6)

## Open-Ended Responses

Is there any other way that the budget impasse has impacted your firm?

Driving people out of Illinois.

Indirectly forcing property taxes out of Illinois.

25% of budget is state funded

Ability of the state to pay. Don't know when you'll get paid

All the removed affects us because it has been effecting other businesses because of the instability of it all.

As long as there is no lay off of state workers

Because of the seniors leaving here are scared.

Being a Bank makes customers nervous :, paid , contracts ,

Because non-productive works.

Client base, people in the government are jack asses!!

Collecting money from the state

Concerned about the future, the government has an impact on local and national view of Illinois

Consumer confidence (2)

Consumer confidence in the economy is the largest problem for my firm. If the governor is able to accomplish, then it might be better for Illinois' in the long term. People are afraid that they are going to lose their job therefore they are not spending any money.

Contracts with the state have declined

Creates uncertainty

Customers insecure

Customers may not purchase

Dampening peoples interest in spending and hurting people's attitudes

Decrease in inflation

Delayed pain

Develop land has affected the customer base, the buyer, if the jobs increased then that would flow down to more home buying.

Do insurance non - profit / home health care agency that gets funding from state

Driving down for people looking for apartments

Eliminates customer because they can't sale to the state with no budget.

Eliminating Granting opportunities

Embarrassing

Employment for out of state is a problem.

Future planning

Getting more phone calls on how to fix the budget impasse.

Greatly effect organizations that they work with

His customers can't pay him.

Huge impact on what they do for the state in finance

I would say that some of the vendors that the state owes money to are not spending money at the level they normally would. They are not spending and that in turn affects us.

If people are not getting paid or are losing jobs they will not pay for insurance

I'm not able to effectively help the mothers who come into my outreach center as a result of the impasse.

Impasse has stopped state employees from traveling to the capitol - the owner stopped the direct billing to

the state for payment.

Indirectly

Impacted companies for clients

It caused mortgage defaults.

It affects markets we sell to.

It has affected the confidence in spending for their customers.

It has had a devastating effect on the economy of Springfield plus every other aspect that was just previously listed.

It has reduced our ability to serve children. It has increased the community's need for support but decreased our ability to meet that need.

It increased my business because people are scared.

It's indirect because we don't get money from the state so it affects your patrons

It takes a year to get paid by the state ,so I no longer work with the state

It will have an eventual effect on taxation issues.

Just slows our accounts receivable.

Large negative impact and it is harming people 50 years and older

Less contributions

Less floor traffic, less client's walking in

Limits long term planning and lowers community moral

Long term uncertainty. Lots of reluctance in investing.

Low payments

Made customers nervous

Maintaining full time employment

Major is not getting work on contracts like they used to. They had to close down services although few are still working. In general close down service dept.

Many brokers firm tell us they are behind on mortgage payment due to state not paying them

Messed up whole scheduling

Members work for the state. Currently they are getting paid. If it gets to a situation where its not getting paid. they will have a problem

Membership

membership was in past, but corrected

Messed with consumer confidence

Morale (2)

My reserves are dwindling at this point. I will be in deficit by the end of the year if I don't receive money from Government.

Negative effects our clients. For instance, nonprofits advertise with us, state government agencies elaborate with us. They don't have any money so they cannot do business. So we lose sales.

No ability to plan for the future

No effects seen because employer does not do business with the state and most business is out of state

No funds for clients.

No its financial

No payments

No work and hard to get paid when we do work.

No. College students not getting their monies, spending less. Vapor products

nonprofits are effected  
Not being paid  
Not knowing of what's going to happen as far as the projects are concerned, We had turn down orders.  
Not knowing when this is to be resolved. Infrastructure bill.  
Not noticeably yet.  
Other than everybody who has a brain has left Springfield, so why should anyone stay?  
Our clients mainly governmental units don't get money  
People are afraid to buy cars.  
People do not come in if they do not have any money.  
People don't want to spend money at the moment. Not sure what the state is doing.  
Potential losses in future sales.  
People more grumpy  
Projects would get worked on if there was a budget.  
Receive grants-now withholding the grants.  
Reduced confidence  
Reduced the patient intake because people do not want to spend money  
Sales  
Sales are down  
Slowed the market down a little bit  
So much uncertainty makes it hard for someone to run a business  
Some people cannot pay insurance and let them lapse then we must re-write policies.  
State employees are spending less money. Insurance Reimbursement will likely increase due to the impasse.  
The availability of workforce. The fact that the state agencies do not have funds restricts what we do because the state agencies are one of our clients.  
The child care has affected and employees.  
The consumer confidence is the biggest thing, the uncertainty of what is going on with state employees jobs. Our business hasn't submitted any contract bids to the State in FY 2016.  
The counties can't hire us to do work  
The employees not knowing if their checks are coming in  
The impasse has a dark cloud over everyone when investing and spending.  
The main thing is unreliable state workers. Ca not get hold of state workers. Poor moral with state workers.  
It sets everything back. It has not helped at all and making it worse. Who is going to pay the taxes? IL is one of the most difficult and expensive to do business with.  
The Suspension of CDB work  
They have a lot of people calling, getting bids but they are unable to get the product or have to cut back the order  
Uncertainty and concern of how it will impact the local area.  
Uncertainty, questions about the state's commitment to preserving history. History is our business.  
Uncertainty of continued operation  
Unemployment will hurt his bus.  
Vice president is stressed. Employees stress level at home reflects stress at work.  
We are a Social Service organization and people are choosing not to spend their money because they are not sure what their income will be.  
We lend to businesses that aren't getting paid. It negatively affects who we lend to.

We offered a special interest loan.

We pre require lands, funds tied up , local government cannot pay up

We won't do business with the state as they cannot pay their bills

We've had some late payments. Some of our customers who rely on the state for income have been late with their payments.

Without a budget it affects work. There will be less work.

Yes people who do not have the money turn to the state for help



Thinking about all of the government regulations that affect your organization, what is the most burdensome regulation that affects your organization?

1. Healthcare 2. General Regulatory

ACA in paperwork, minimum wage, workman's compensation

Affordable care act(4)

All rules and regulations

APA

Audit requirements.

City code

Cost for start-up fees

Cost of worker's compensation.

County government

Dept. of Labor ruling on fiduciary

Dodd frank (2)

Does not have any.

Employment hiring practices

Employment regulation

Employment taxes (2)

Energy regulations

Environmental regulations (2)

EPA regulation

Fair labor act

Federal

Federal clean water act.

federal income tax

Federal level.

Federal regulations (2)

Fees

Filing of taxes and reports.

Food service

Government issues

Health Insurance.

Healthcare and benefits (3)

Healthcare costs.

Healthcare for employees.

Healthcare mandate

Healthcare mandate is a burden because of my employees. I cannot afford to pay for the insurance. That has a big burden on my small business. It has become a burden to dispose of electronics. Grant money is not being awarded to these facilities. They did not provide enough avenues to get rid of these electronics. Limited Resources. Give me an avenue to get rid of these electronics in the proper way.

Healthcare regulatory.

How we conduct business regulations.

Insurance (4)  
Insurance cost and work compensation.  
Insurance regulations  
Issues involving state regulations.  
Land use and zoning  
Land use regulation and all of them.  
LAND USE REGULATIONS  
Land use.  
Liability issues  
Licensing fees.  
Licensing regulations  
Local and federal regulations, land use and environmental related  
Local state taxes  
Matching the SSN  
Medicare and Medicaid Regulation  
Minimum wage and health care regulations.  
Most of them getting work done!  
Municipal Ordinances  
No effect (2)  
Not having a right to work.  
Occupational Licensing Rules.  
OCEA  
Ongoing oversight. Compliance  
Overall competition of market  
Payroll, wages  
Permits from the city and state  
Procurement Regulation  
Prevailing wage (3)  
Professional licensing (2)  
professional regulations  
Public communication.  
Regulation does not affect our organization.  
Regulation of taxes  
Regulations concerning higher ed.  
Regulations of prepares on tax returns.  
Reporting requirements  
Restrictions on lending stock closing requirements by the federal government  
Rules and paperwork  
Safety Regulations  
Set and files  
Social security  
Start up and filing cost  
Start up or change

Start-up on the local (government) side.  
Startup regulations  
state and federal regulations of insurance  
state cannot deliver on promises, change affect  
State child care licensing.  
State Government Regulation  
State licensing requirements  
State Mandate  
State minimum wage  
State regulated funding  
State regulations  
State regulations, workers compensation  
State tax  
Tax deductible for charitable gifts  
Tax liability  
Tax requirement  
Taxation (13)  
Taxes at 33%  
Taxes, and the lack of skilled workers. Difficulty finding workers who will work for minimum wage and difficulty finding people with valid driver's license.  
Taxing programs and the constant changing. There are changes in how taxes can be changed. First was able to pay at bank, now must be paid online. This is a burden because the system keeps changing. Time spent is too much.  
The Affordable Care Act.  
The Dodd Frank (2)  
The EPA.  
The insecurity of what they might do  
The lobby registration act.  
The overhead of paying and reporting payroll taxes.  
The state taxes  
The tax code (2)  
The tax filing burden. It is just a lot to keep up with.  
The telecommunication regulation is the most burdensome  
The way the building departments are executed in Springfield and Sangamon county.  
There is no burden resulting from regulation  
Tort Liability Environment.  
UAD - Universal writing program.  
Un business friendly  
Unemployment insurance (4)  
Unemployment  
Unemployment Insurance cost (2)  
Unemployment management, work comp  
Unfunded mandate

Union  
Union labor  
Union Regulations.  
Union requirements  
Union rules  
Unions (2)  
United States Department of Transportation  
Workers compensation impacts us the worst and tort liability environment is second.  
Workers Comp (22)  
Workers Compensation Insurance (2)  
Workers Compensation Regulation.  
Workman's compensation and unemployment  
Workman's compensation, unemployment. related to employment taxes  
Workers compensation and disability.  
Workers.  
Would have to be anything the National Labor Relations Board comes out with which includes liability, responsibility.  
Zoning regulations, EPA regulations

Is there something specific that you think a unit of local government in Sangamon County could do to be more effective in helping you grow your business? If so, what is it?

A city planner would help better economic development and growth.

A new developer's agreement.

Access to the university, healthy development in downtown.

Assisting small businesses to find qualified employees or training program and link to small local businesses

Attract younger, more skilled work force.

Awareness of who we are.

Be more business-friendly and fewer restrictions on development requirements.

Be more welcoming to business

Be much more proactive in developing business, via the building departments they discourage business.

Better low interest rates for leases

Better training of skilled workers basic hygiene

Bring better employees to area.

Business incentives.

Businesses can work together to fund schools in their district.

Buy from his business or don't bother his business

Buy local, Use local and spend more locally. We don't need to see our money go to Peoria (2)

Can be more effective

City of Springfield could be more accommodating to investors

Combine few units of government. and regulatory

Combine local units of government. Get rid of townships

Department of insurance

Drop taxes and property taxes.

Education. Offering information. Online based.

Encourage local patronage.

Excessive code regulations

Expand the TIFF zones.

Fair level.

Financial investments that support local businesses.

Financing

Funding for our clients to hire us.

Garbage Fees

Get a budget and do their jobs

Get out of the way

Get the state financial house in order.

Getting government agencies to be on same page not conflicting with each other

Government's budget issue. Leaves people with less confidence to spend money with the organization.

Greater clarity on labor laws

Get out of the way

Have a better city plan to help growth in the city, sporadic and unfocused at this point  
Help the budget  
Help with advertising  
Helping build bike friendly roads.  
Hunter Lake would be helpful  
I guess it'd be courses at Lincoln land or vocational studies  
I think that small business loan programs would be a big help.  
I would say more advertising options.  
If Magros Meat Processing tried to open across from my business because of zoning issues, it would be good for exposure for business on Rt. 4.  
If the county took care of licensing instead state.  
I'm not sure how the county can address the problem, but I'm having difficulty finding employees to work.  
Improving business climate in county  
Increase employment.  
Infrastructure  
Instability of state workers, state workers worry about losing jobs  
Just get their act together and run things correctly and honestly  
Keep the infrastructure up  
Less government involvement and less taxes; making it easier to want a company to want to open up in Sangamon County.  
Licensing. Regulations is a big problem for her business.  
Lowering the taxes  
Make regulation easier to implement.  
Making it an environment that individuals would like work and live in.  
More industry to this area  
More insurance, capital improvements are not made in vain because of governmental regulations  
More programs on growing businesses  
More small development centers  
More Vibrant Economy  
No. I believe in less government, so I am not looking for ways to start a new group in government.  
Not getting in the way  
Not Holding back on things important to running a business  
Not paying more taxes  
Offering grant funded opportunities  
Opening up more Tax Increment Financing districts for incoming businesses to boost manufacturing  
Pass the budget. Pass the gaming and gambling bill.  
Passing a viable budget.  
Permit issues should be resolved.  
Pressure to purchase from local businesses  
Process building permits reasonable and quickly.  
Promote locally better  
Put more of the information online

Quit cutting the budget  
Recognize difficulties of being a business.  
Recruit business to Sangamon County and we're losing businesses to Texas. Lower our overhead, but improbable because of Chicago HIEARCHY  
Reduce proprietary taxes  
Reduce taxes- cost of employing an individual  
Reduce taxes on businesses and provide more tax incentives  
Reduce the amount of costs and regulations.  
Reduce the property taxes and energy costs, reduce future pension compensation.  
Reduce the restrictions on small business  
Reducing requirements  
Reduce number of unfunded mandates  
Remodeling.  
Reorganize CWP  
Restore funding to the public access television networks. Provide opportunities that does not drain our funding.  
Review zoning requirements for small businesses  
Revitalize downtown. Bring people in Sangamon because we need new consumers.  
Safer streets and slower drivers.  
See what can be done to decrease the business tax rate  
Shop local  
Start getting involved in the small businesses. If they would come in and check out our facilities and talk to the business owners and get feedback, I think that would be very helpful.  
Streamline operations (2)  
Streamlining and consolidate township government.  
Support services for low fees  
Tax incentives  
The funds could be utilized more smartly.  
They could buy locally.  
They could increase licensing fees  
They could spend money on repairing the infrastructure (streets, roads and bridges). So people can have work and get to work.  
They don't appreciate business as much. They get too restrictive on this business in particular  
To not make it so difficult for new businesses, it is a more of a pain in a butt for people to start new businesses. If they were not so difficult in letting people startup businesses then a lot more would get done.  
Transparency  
Unable to get a hotel sign on the highway because there isn't enough signs.  
Utilities, decrease these and real estate taxes  
We need streamline zoning regulation and with less hurdles to expand.  
Yes quarterly meetings with the chamber of commerce  
Zoning to strict how we does things on our own property.

Is there anything else you would like to tell us about your economic outlook for the next 12 months?

2015 was a not so bad year and hopes for the best or similar to next 2016.

Competitive for start ups

Control government spending so it will not create much of a burden on people paying their taxes

Depends on the state budget situation, what comes with that.

Economic outlook is reasonable but the big overhang is the State of Illinois. This could create either significant solutions or opportunities depending on what happens. Nothing will happen until the 1st of next year at the earliest.

Flat economy for the next 12 months

Freeze on a lot of spending

Have the state fix budget.

Having a positive outlook

Hope Rauner gets things straightened out.

Hope they pass a budget

Hoping that things will turn around as far as contributions and donations, enabling us to help the mothers and their children

I do not like the whole state budget. If the state is not spending it makes it very difficult. And If the state of IL is not working we will go to another state to get work.

I hope it is positive. I hope we can grow a little bit in the current economy or maintain where we are at.

I thought it would have been better.

I want an even playing field between internet business and regular business. Internet businesses have a built in advantages (8%), I would like that to be more of a level playing field.

I wish they would do their job, the government

If the state can find its way to find its budget to straighten out

Illinois is very bleak because of new governor

I'm glad I'm retiring.

In general the economy is poor. And will stay bad until something is done.

It is going to be rough if state does not do something.

It just not look very positive.

It's not very good. Our business has taken a hit the last few years. We had to move to cut our expenses. It's not good doing our business in Springfield, Illinois. If I could, I would go elsewhere.

Just peachy.

Just praying.

Landed huge contract for next 5-7 years. Revenue from it will be equal to revenue made as a whole every year for past 4-5 years. We are traditionally doing a lot of business with state and local govt. but because of the state not having money to spend on IT contracts, they are looking to work with Small businesses and hospitality services. They have worked with international hotel chains and looking to expand.

Looks bright.

Maybe they should ask farmers.

Members will be hurting if budget does not pass



Need customers

No. Hoogland Center for the Arts Business really depends on the financial help of the city. So if the city is not doing well financially, then the company suffers as well.

PEOPLE ARE SCARED TO NOT BUY NEW STUFF, THAT'S WHY MY BUSINESS IS GOING GOOD.

Positive outlook

Positive slight increase

Remain hopeful

Right now there is a low supply of skilled and qualified help to do work. The current worker's compensation and unemployment insurance setup limits the amount of hiring we can do.

Scared.

She thinks it is promising.

State government needs fixing

State government needs to get it together.

State needs a budget

State needs to get its act together(2)

State of Illinois is an embarrassment. It is effecting buyer's decisions in spending and needs to get their act together.

Tentative

The dropping in gas prices are stimulating for the overall economy

The overall number of full-time jobs that will be created by the economy that will have the greatest on your impact on your business. 27% of the Sangamon workforce is being employed by the state, it's going to be important that the budget issue is resolved or else we are going to have 1/4 of our consumer base not spending.

The respondent hopes the Governor releases the state LIATAPE fund to DCEO to provide utility assistance to low income people.

The state could cut the money they are spending in half.

The state is losing significant amount of money by not collecting sales tax on on-line purchases

Things are improving. Things can change like property taxes. The city can help them.

Uber is a great benefit to the restaurant/dining establishment. People can easily get a ride home even if they drink a lot. Regarding my economic outlook for the next 12 months, it sure would be a lot better if they would get a state budget.

Very optimistic organization.

We are going to go into a worldwide recession.

We got a nice backlog that if the state does their IDOT infrastructure program, we'll be good. If they pull back it is going to put a lot of contractors in a lot of hurt.

When the state get their budget, they'll be happier.

Wish the state would get a budget.