Conducted by the:

UNIVERSITY OF ILLINOIS SPRINGFIELD

SURVEY RESEARCH OFFICE

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and The Greater Springfield Chamber of Commerce

Methodology

The Sangamon County Economic Outlook Survey is a mail survey examining the economic perceptions, expectations, and evaluations of Sangamon County businesses and non-profit organizations. The survey has been conducted biannually (March and September) since 2008[1] 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 with 10 or more employees, provided by the Greater Springfield Chamber of Commerce in the fall of 2007. The Fall 2013 sample was updated by the GSCC in February 2013.

The final sample included 1341 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 September 20th, 2013, with follow-up questionnaires being sent on October 4th. The survey was closed on October 18th. 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 2013 results are from 175 respondents. The overall survey has a 13.4 % response rate.

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).

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 John Parrish and Paul Marsh at the Greater Springfield Chamber of Commerce for their guidance on this project.

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[1] The only exception being September 2011.

Table 1 presents the business demographics for the respondents.

Table 1 Business demographics of respondents

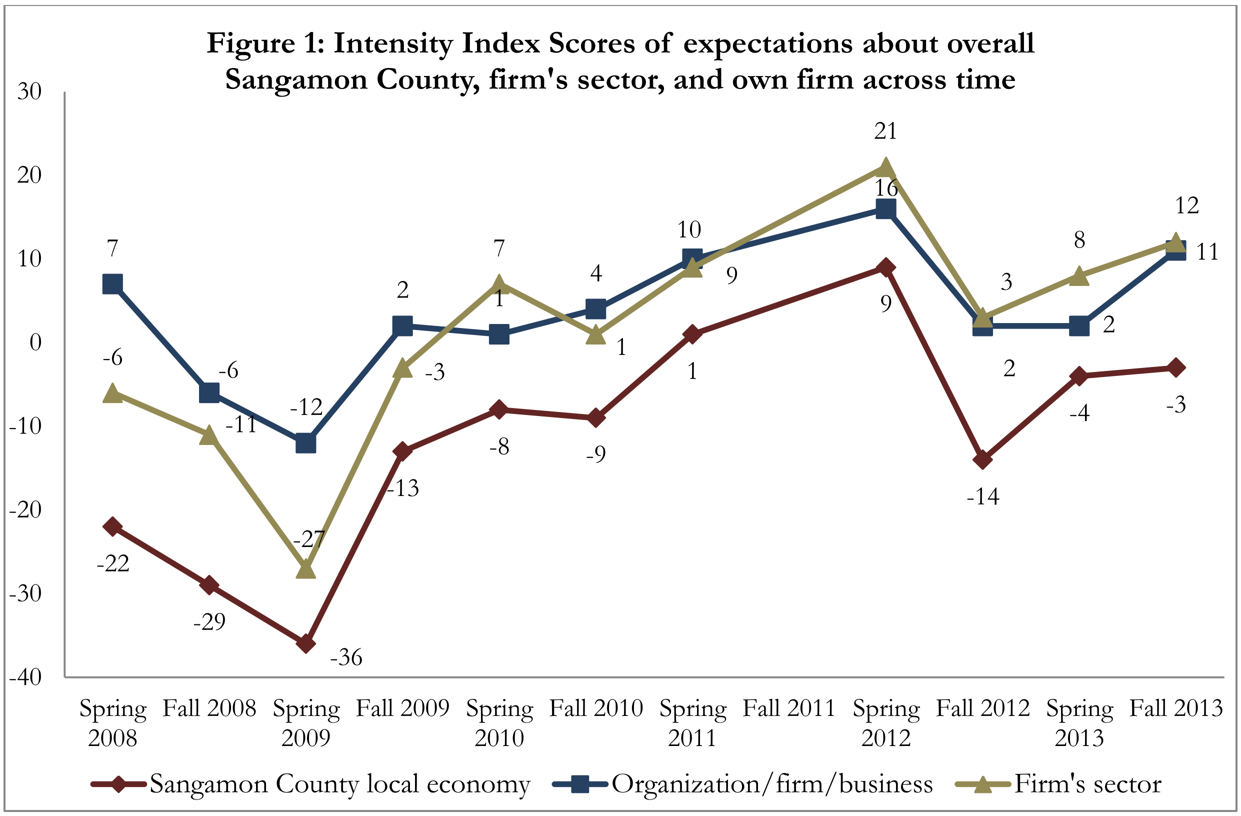
	Responses	Valid frequency
Sector		
Private sector (for-profit)	126	74.6%
Non-profit sector	25	14.8%
Public sector (government)	18	10.7%
Unidentified	6	
Primary Economic Activity[2]		
Construction	12	7.1%
Manufacturing	9	5.3%
Wholesale trade	7	4.1%
Retail trade	23	13.6%
Transportation/ warehousing	7	4.1%
Finance/insurance/real estate	20	11.8%
Medical/ health care	17	10.1%
Education/ educational services	10	5.9%
Accommodations/food/entertainment/recreation	18	10.7%
Information and communications systems	5	3.0%
Business and professional support services	21	12.4%
Personal services	20	11.8%
Other	6	
Median number of years in current location	159	29 years
Median number of years in Sangamon County	151	40 years

[2] The Fall 2013 survey is the first 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 and no differences were found (both *IIS* were +12), therefore we relied on the inputted dataset in order to increase the number of respondents included in the analysis.

Executive Summary

The Fall 2013 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. This survey follows 12 months after the Fall 2012 survey, which marked the lowest expectations for economic conditions in Sangamon County since the recession.

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



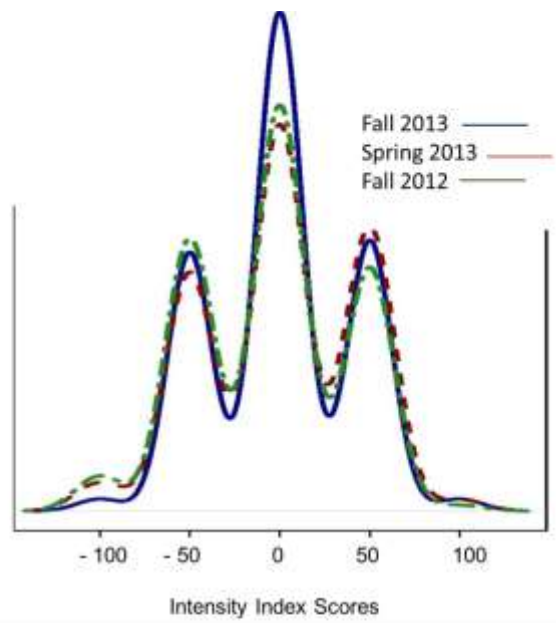
Across time, respondents are more positive about their own business' growth and their own firm's sector than the overall Sangamon County economy.

Since 2008, the overall Sangamon County economy has received more pessimistic expectations from respondents than expectations about their own firm or their own firm's sector. As seen in Figure 1, across all years, the overall Sangamon County economy expectations is 17 points lower, on average, for the Intensity Index scale than own firm expectations and 11 points, on average, lower than respondents' expectations of their firm's sector (and in Fall 2013 is 14 points lower than individual expectations and 15 points lower than firm sector expectations). The Fall 2013 survey continues this trend with expectations of the overall Sangamon County economy continuing to be negative (-3 in the *IIS*), while both expectations of their own firm and expectations about their firm's sector to be positive (11 and 12 *IIS*, respectively).

Sangamon County Employment Stays Stable

In the Fall 2013 survey, Sangamon County employers report that they expect employment rates to remain stagnant, consistent with Spring 2013 results. The Intensity Index Score for overall employment in the county is between 0 and 1 for both Fall and Spring 2013, indicating that employers expect it to stay the same. In the most recent survey (Fall 2013), we find that 47.4 percent of respondents expect employment to stay the same, 26.8 percent expect a small or large increase, and 25.7 percent expect a small or large decline. This distribution of responses is remarkably similar to the distribution found in both Spring 2013 and Fall 2012 (see Figure 2 below), with a small exception- a higher percentage of individuals are reporting no change than seen in previous surveys.

Figure 2: Comparing 2012 and 2013 Sangamon County Employment



The percent of respondents who report that they expect no change ranges from 42.2 percent in Fall 2012 to 40.7 percent in Spring 2013 to 47.4 percent in Fall 2013, indicating that the percent of individuals who expect a change in employment (either positive or negative) has decreased over the past year. In September 2012, the U.S. Bureau of Labor Statistics reported that the unemployment rate in Sangamon County was 7.3%, this increased slightly to 7.8% in March 2013, and is approximately 7.1% according to the Federal Reserve Economic Data provided by the Federal Reserve Bank of St. Louis (data.bls.gov; www.stlouisfed.org).

When we examine respondent expectations of their own firm's number of employees, we find more positive results with only 12.6 percent expecting a decline, 54.5 percent expecting no change, and 32.9 percent expecting an increase. In fact, the Intensity Index Score for individual firm employment currently sits at +8, a seven point increase from Spring 2013. If we break down individual firm employment by public, non-profit, or private sector, the results somewhat vary. Seventy-seven percent of public sector employers expect employment in their organization to stay the same, as do 53.6 percent of private sector firms, and 44 percent of non-profit firms.

Employers need Employees with Personal and Communication Skills

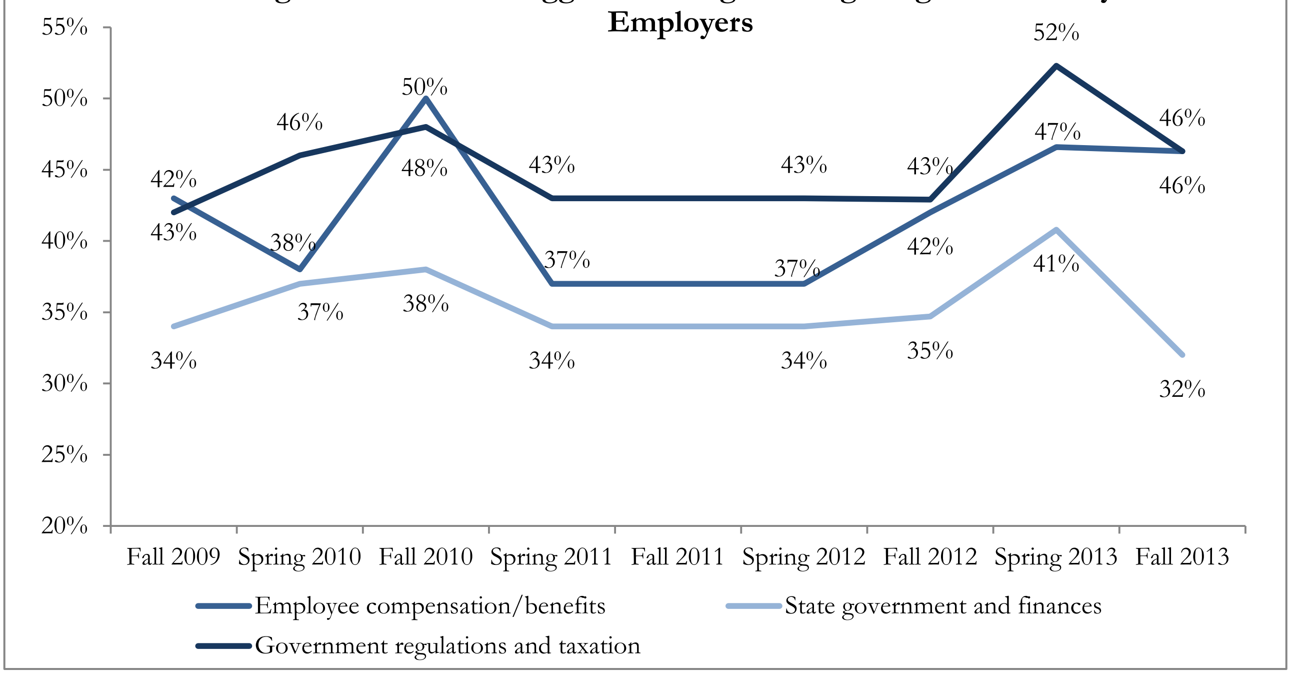
The Fall 2013 topical section of the Economic Outlook Survey asked employers what traits/characteristics they are most looking for in new employees. Respondents selected from a list of employee traits. A majority of respondents report that they are looking for employees with personal skills (work ethic, responsibility, integrity) and communication skills (speaking, writing, and working in teams). The two highest rated skills are personal and communication with 90 percent (89.7) of respondents report that they are looking for employees with personal skills and 55.4 percent of respondents report that they are looking for individuals with communication skills. Respondents were least likely to be looking for individuals with computational skills (math, database management, graphs) or business skills (budgeting, marketing, and customer service).

There are some differences among sectors. For example, computer skills are more important for employers in the medical sector (47.1 percent) and technical skills are more important in the construction sector (45.7 percent) as well as the information and communications sector (80 percent). Communication skills are most important to those in the finance sector (70 percent), the medical sector (64.7 percent), the education sector (60 percent) and the information and communication sector (80 percent).Yet, personal skills are the most needed characteristic across all employer sectors (ranging from 80 to 100 percent of respondents in each sector rating it as an important attribute).

Biggest Challenges Facing Current Businesses/Firms/Organizations

The biggest challenges facing local Sangamon County employers have not changed significantly since Fall 2009. As seen in Figure 3, for the past four years employers have remained concerned about employee compensation/benefits, government regulations and taxation, and the state government and finances. Other challenges including energy prices, inflation, and consumer

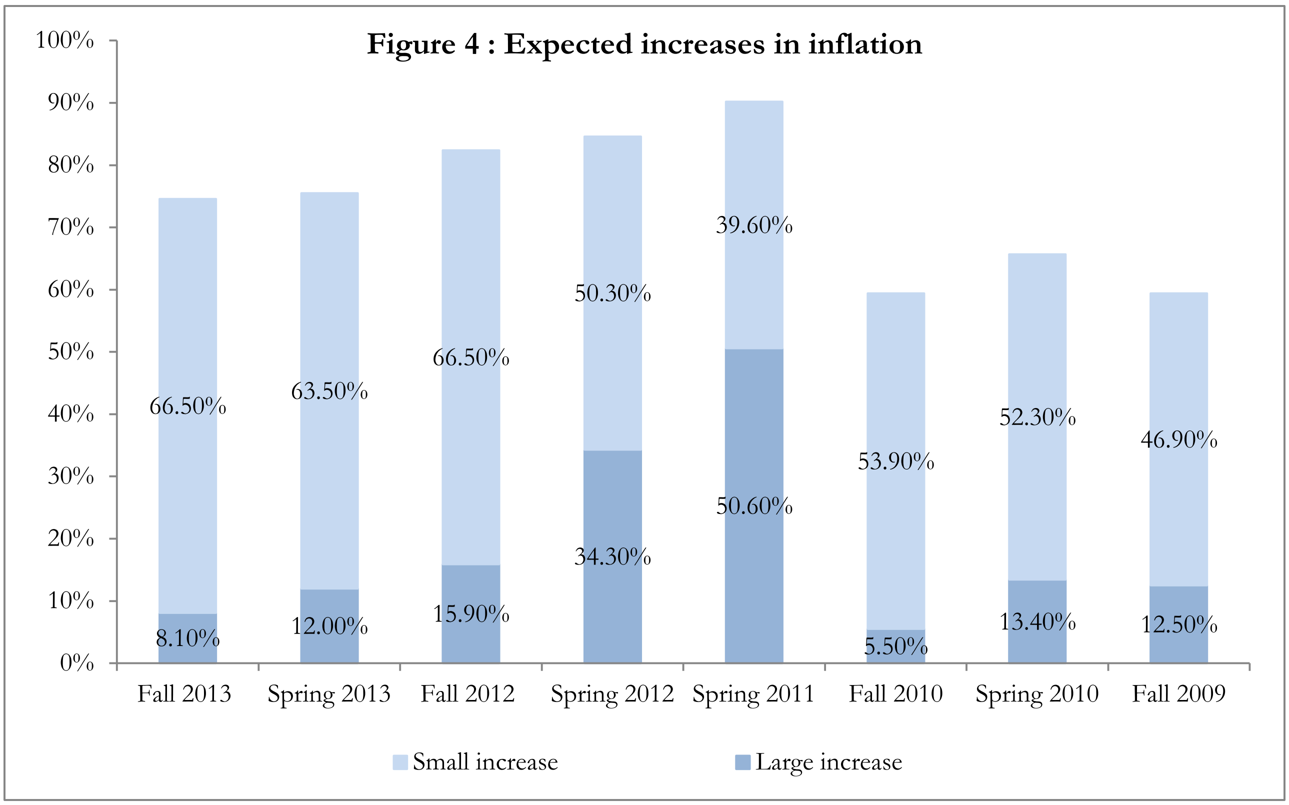
Figure 3: The three biggest challenges facing Sangamon County Employers



confidence/spending have fluctuated over the past four years but less than one-third of respondents in the Fall 2013 survey indicated that these were one of their three biggest challenges for the next 12 months.

Concerns about Inflation

Since Fall 2009, the majority of survey respondents have reported that they expect inflation to increase to some degree (either small or large). The Fall 2013 survey continues this trend, despite the fact that as of October 2013, inflation sits at 1.5%, and both the Consumer Price Index and the Federal Funds Rate have remained fairly stable since Spring 2012.[3] Since 2008, when inflation was at its lowest point in recent history at .1%, inflation has only seen two increases. In 2009, inflation increased from .1% to 2.7% and in 2011, inflation increased to 3% from 1.5%. So far in 2013, inflation has stayed somewhat stable and decreased slightly from 1.7% in 2012. Despite these small inflation changes, respondents still expect inflation and interest rates to increase over the next twelve months. Figure 4 tracks concerns over expected changes in inflation since Fall 2009.



[3] According to the U.S. Bureau of Labor Statistics' estimate, the CPI for Midwest middle-sized cities has only increased slightly from 141.30 in Spring 2012 to 143 in Fall 2013, while the Federal Funds Rate has stayed at .25%.

The Sangamon County Economy

The Fall 2013 survey indicates mixed expectations for the overall Sangamon County economy (see Figure 5). Twenty-seven percent of respondents report that they expect an increase in the overall economy, 40.5 percent expect it to stay the same, and 32.4 percent expect a decline over the next twelve months. While these results are more positive than the Spring 2013 results, they are still in a negative direction. When examining the most recent Intensity Index Scores (*IIS*), we find that respondents expect an increase in gross sales/revenue (+9) in the county, as well as capital investment (+8), overall employment (+1), and interest rates (+25). However, respondents expect a decline in contributions to non-profits (-16), and expect inflation (+40) to increase.

Figure 5: Expectations for Sangamon County Economic Factors

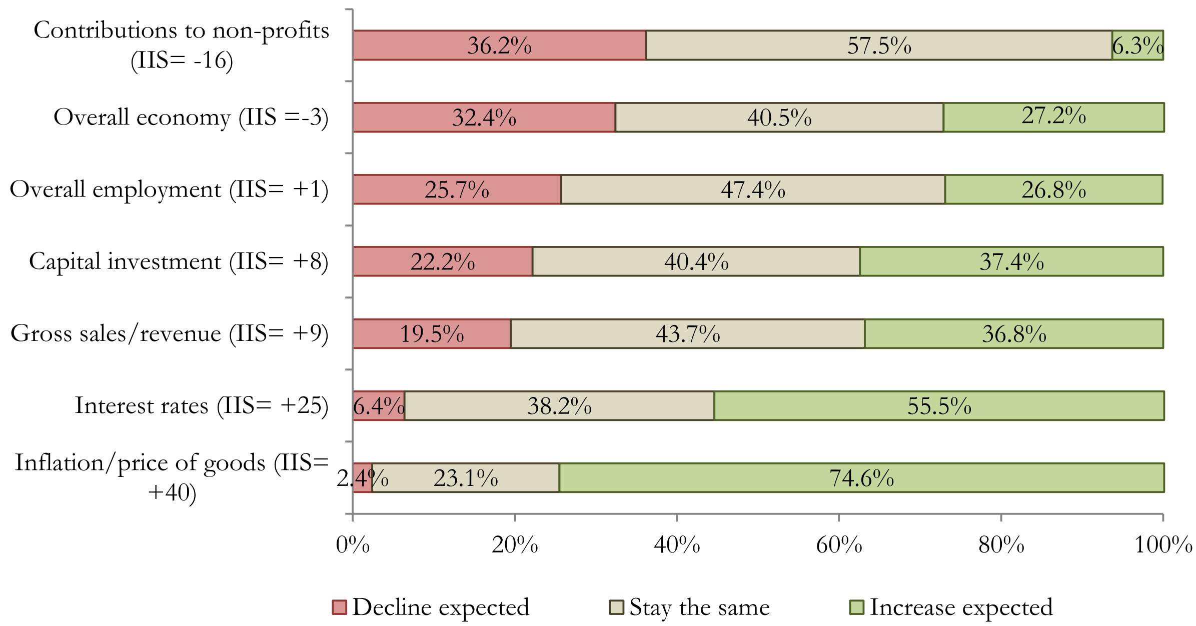


Table 2 displays the current Intensity Index Scores, the Spring 2013 Intensity Index Scores, as well as the change between the scores. As seen in the table, for all of the indicators except overall employment and inflation (which remained the same), the Fall 2013 survey had more positive expectations than the Spring 2013 survey.

Table 2. Intensity Index Scores for overall Sangamon County factors

	Fall 2013 IIS	**Spring 2013 IIS**	**Difference (Fall 2013- Spring 2013)**
Overall employment	+1	+1	no change
Capital investment	+8	-4	+12
Interest rates	+25	+15	+10
Gross sales/revenue	+9	+6	+3
Inflation/ price of goods	+40	+40	no change
Contributions to non-profits	-16	-22	+6
Overall economy	-3	-4	+1

Examining Expectations by Sector

We find mixed results in respondents' expectations by economic sectors in Sangamon County with certain sectors expecting increased growth and others expecting substantial declines (see Table 3). The medical/health care sector consistently receives the most positive expectations, and the Fall 2013 is no exception. Respondents continue to rate the medical/healthcare sector positively in the Fall 2013 survey with a +39 Intensity Index Score. The majority of respondents (69.6 percent) expect the medical/health care sector to increase over the next 12 months. The healthcare industry is represented within the five largest employers with Memorial Health System, St. John's Hospital, and the Springfield Clinic ranking 2nd, 3rd, and 5th respectively. The fact that respondents continue to expect growth in this sector is promising for the overall Sangamon County economy.

Table 3. Intensity Index Scores for specific economic sectors

	Fall 2013 IIS	Spring 2013 IIS	Difference (Fall 2013-Spring 2013)
Own firm's sector[4]	+12	+8	+4
Construction	+15	+13	+2
Manufacturing	-15	-13	-2
Wholesale trade	-8	-2	-6
Retail trade	+3	+9	-6
Transportation/warehousing	0	+1	-1
Finance/insurance/real estate	+12	+22	-10
Medical/ health care	+39	+38	+1
Education/ educational services	-1	-13	+12
Accommodations/ food/ entertainment/ recreation	+12	+7	+5
Information and communications systems	+17	+15	+2
Business and professional support services	+8	+4	+4
Personal services	+3	-1	+4

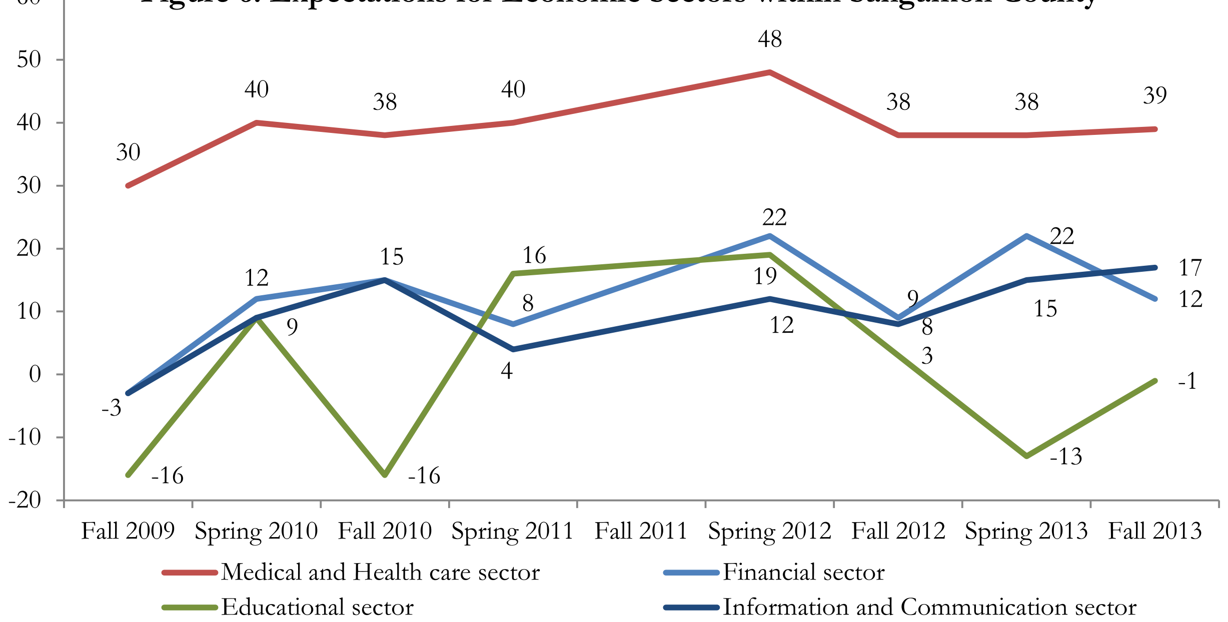
One of the more negative findings of the Spring 2013 survey was the decrease in expectations about the education/educational services sector.[5] In the Fall 2013 survey, the educational sector saw a slight increase in expectations compared to the Spring 2013 survey, but expectations are still slightly negative overall (-1 *IIS*).The majority of respondents (63.5 percent) report that they expect the

[4] This variable was constructed by combining a self-report of own firm's "primary economic activity" which was then coded into one of the appropriate twelve sectors, and the individual response with the corresponding sector category.
[5] It is important to note that no definition of "education or educational services" sector is provided by the survey instrument and there is no distinction in the instrument between pre-K education, K-12 education, or higher educational institutions.

educational sector to stay the same over the next 12 months, while 18 percent expect an increase and 18.6 percent expect a decline in expectations.

Personal services saw an increase in expectations to a +3 *IIS*. This marks the first time that respondents have reported positive expectations for the personal services sector since Spring 2012. Information and communications systems has consistently received positive expectations and the Fall 2013 survey marks the third consecutive survey in which expectations have increased (from +8 in Fall 2012 to +15 in Spring 2013 to +17 in Fall 2013). As seen in Figure 6, the information and communication systems sector is the second most positively rated sector in the most recent economic outlook survey.

Figure 6: Expectations for Economic Sectors within Sangamon County



The most negatively rated sectors are manufacturing (-15), wholesale trade (-8), and the educational services (-1) sectors, which is consistent with the Spring 2013 survey. Three sectors (manufacturing, wholesale trade, and retail trade) saw a decrease in expectations from Spring 2013 to Fall 2013.

Overall Expectations for "Your" Firm/Organization

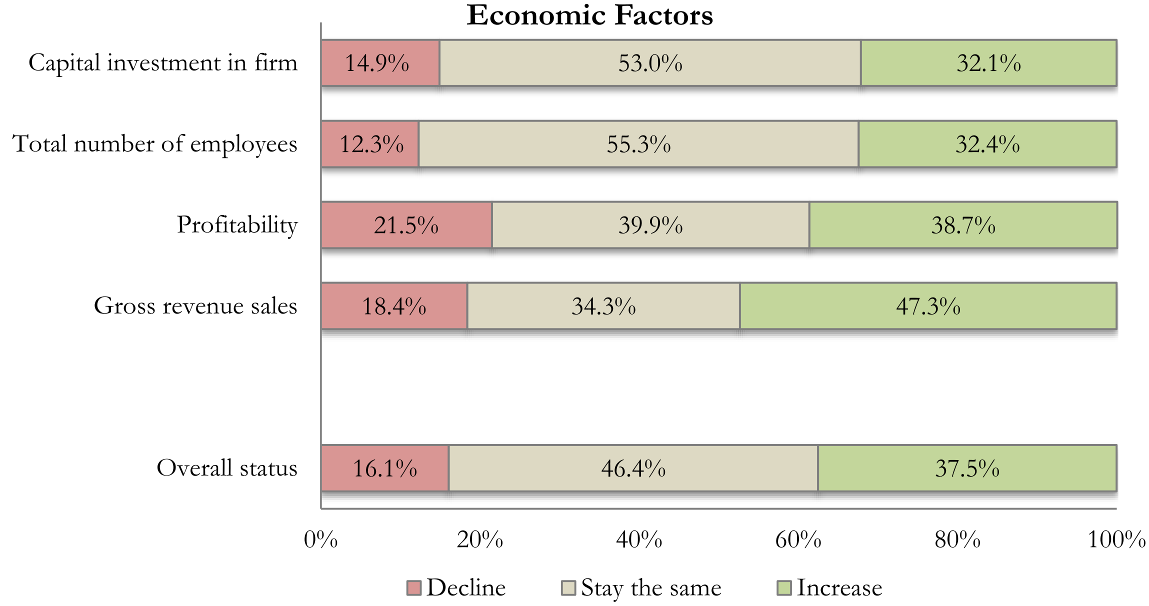
Expectations for individual businesses/firms/organizations over the next 12 months increased on all five items in Fall 2013 compared to Spring 2013 (see Table 4). When asked about the overall status of their firm, 37.5 percent of respondents expected an increase over the next 12 months, 46.4 percent expected no change, and 16.1 percent expected a decline. In addition, the *IIS* increased nine points from +2 to +11. This is the most positive rating recorded in the economic outlook survey since Spring 2012.

Table 4. Intensity Index Scores for own firm/business/organization expectations

	Fall 2013 IIS	Spring 2013 IIS	Difference (Fall 2013-Spring 2013)
Capital investment	+11	0	+11
Total number of employees	+9	+1	+8
Gross revenue/sales	+15	+7	+8
Profitability	+8	0	+8
Overall status	+11	+2	+9

Respondents report that they expect the largest increase to be in capital investment in their firms, with respondents in the Spring 2013 survey expecting no increase on average and respondents in the Fall 2013 survey reporting an *IIS* of +11. In general, respondents have positive expectations about the status of their own firm/organization and have increased expectations compared to six months ago.

Figure 7: Expectations for Own Firm/Business/ Organization Economic Factors



Workforce Training Needs Among Sangamon County Employers

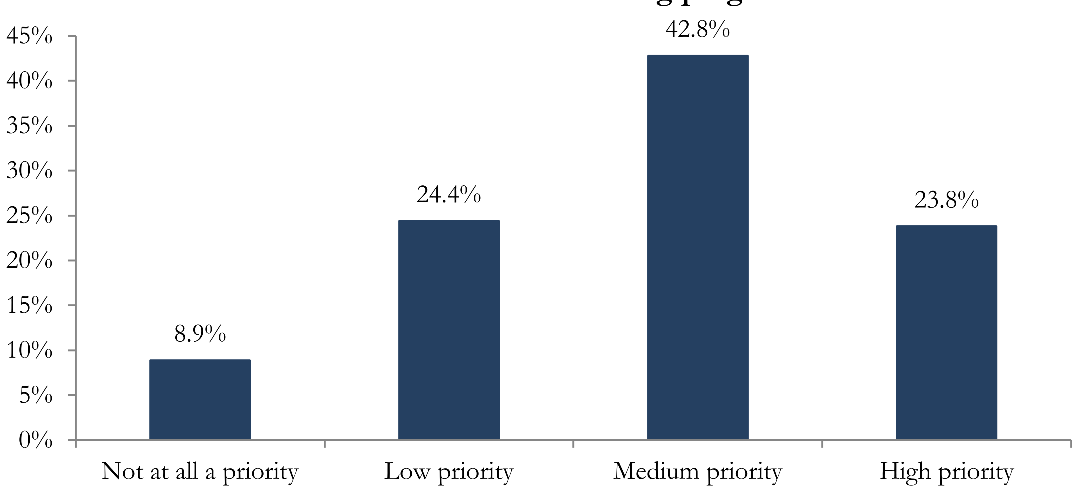
The topical section for the Fall 2013 survey examines workforce training needs among Sangamon County employers. This supplements the 2013 results from the *Sangamon County Citizen Survey* (a project conducted by the Survey Research Office in June 2013) which found that 21.2 percent of Sangamon County's employed residents report that they are currently underemployed. In addition, the majority of residents reported that they have not participated in any employment training programs in Sangamon County (81.6 percent). Despite this low level of participation, 90 percent of respondents report that these types of programs are important for the local area. Results indicated that while residents believe that training programs are important, they are not currently utilizing these programs in order to increase their employment opportunities.

In the Fall 2013 Sangamon County Economic Outlook Survey, respondents were asked several new questions to gauge attitudes about workforce training needs. For analysis purposes, we divide these questions into two categories: *Evaluating Current Programs* and *Sangamon County Skilled Applicants*.

Evaluating Current Programs

Survey respondents were asked whether or not they thought increasing workforce/employment training programs is a high priority, medium priority, low priority, or not a priority at all for Sangamon County. Overall, employers report that increasing workforce/employment training programs is a priority for Sangamon County. Specifically, 23.8 percent of survey respondents believe increasing workforce/employment training programs is a high priority; 42.8 percent believe it is a medium priority; 24.4 percent report it is a low priority; and 8.9 percent of survey respondents do not think it is a priority at all.

Figure 8: Employers' assessments on importance of increasing number of workforce training programs



In addition, the majority of Sangamon County employers report that employee training and development is either very important (47.2 percent) or somewhat important (29 percent) to the success of their business. Only 10.2 percent report that it was either somewhat unimportant (4.2

percent) or very unimportant (6 percent). An additional 13.3 percent report that it is neither important nor unimportant.

Employers were also asked to identify the biggest problem, if any, with current workforce/employment training programs in Sangamon County. Slightly more than one-fifth of all respondents (22.1 percent) say that the biggest problem is no workforce/employment training programs for their specific sector. This response was most common among employers in the information and communication systems sector, manufacturing, and wholesale trade sectors. Fourteen percent of all respondents report that current training programs are not practical or hands-on, 12.9 percent report that cost of programs is the biggest problem, and 4.3 percent report that program accessibility is the biggest problem. Approximately 30 percent of respondents report that they are not familiar with current training programs and 17.1 percent report that there are no problems with current training programs.

Sangamon County's Skilled Applicants

Employers were also asked about their current workforce and whether Sangamon County has enough skilled applicants for recent positions in their firm. Currently, 32 percent of responding Sangamon County employers are having difficulty filling job openings. This means that one-third of Sangamon County employers currently have at least one job opening at their firm that they are unable to fill. Eighteen percent of these jobs are in retail, 14.6 percent are in the hospitality industry, and 8.3 percent are in automotive technical skills. The other positions range from IT consultant to preschool teacher to registered nurses.

In addition, the vast majority of respondents report that they think it is either very hard (14.5 percent) or somewhat hard (54.5 percent) to find qualified, skilled applicants. Thirty-three percent of respondents report that, when they had difficulty filling job openings in the past, it was due to unqualified applicants (lack of skilled workers). The second most common problem was the pay expectations of their applicants, with 16 percent of respondents reporting that the applicants' pay expectation is the biggest problem filling open positions. More than 40 percent of respondents report that they have either not had recent job openings (17.2 percent) or they have not had any difficulty filling these positions (23.3 percent). Finally, respondents were asked about the traits or characteristics they are most looking for in new employees. As noted earlier, almost 90 percent (89.7 percent) of Sangamon County employers report that personal skills are what they look for in new employees and 55.4 percent report that they look for communication skills (see Figure 9).

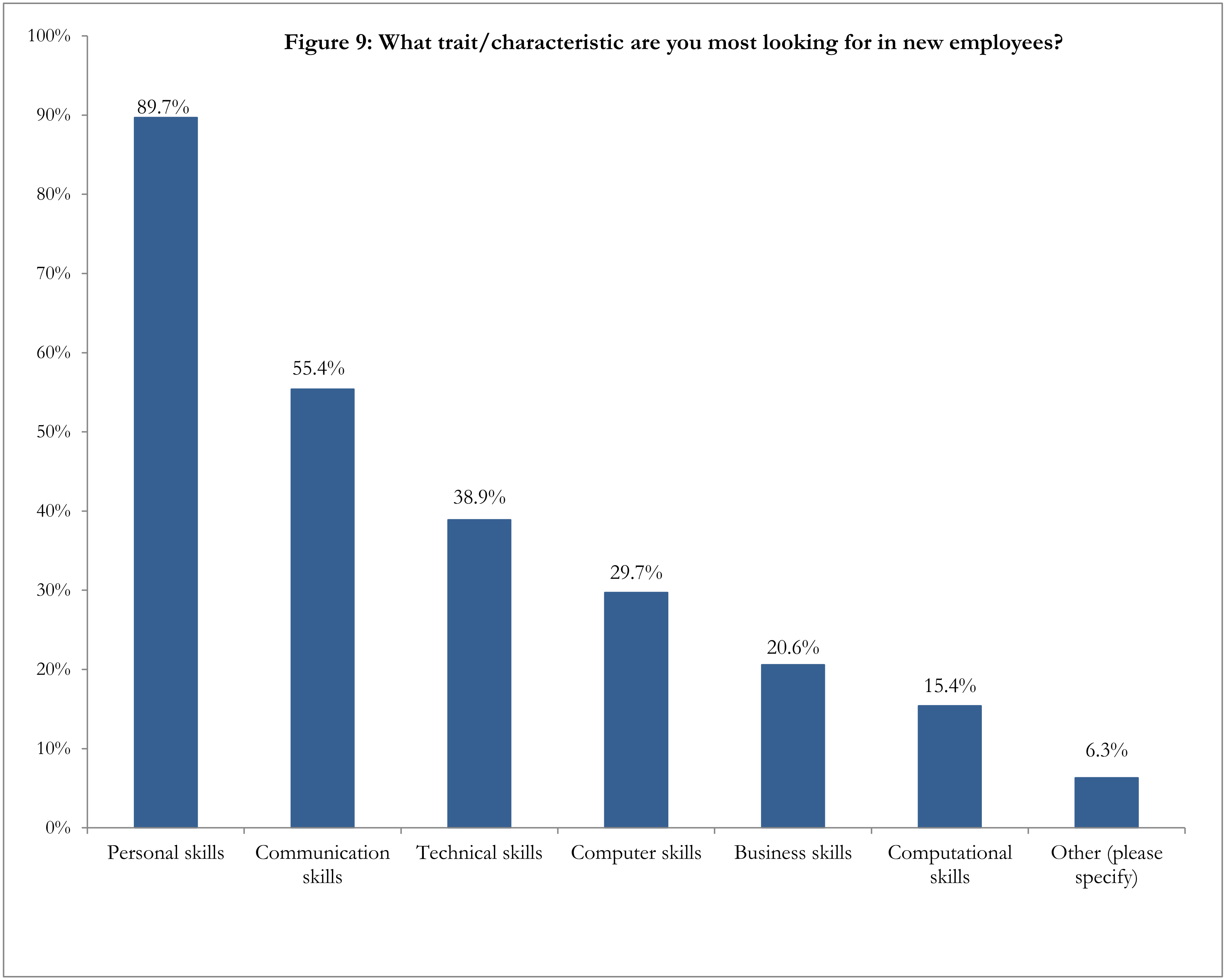


Figure 9: What trait/characteristic are you most looking for in new employees?
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
89.7%
55.4%
38.9%
29.7%
20.6%
15.4%
6.3%
Personal skills
Communication skills
Technical skills
Computer skills
Business skills
Computational skills
Other (please specify)

SCBEOS Survey Topline Results

(N=175)

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)

Large decline	1.1% (2)
Small decline	24.6% (43)
Stay the same	47.4% (83)
Small increase	25.7% (45)
Large increase	1.1% (2)

Capital investment (Intensity Index Score = +8)

Large decline	2.3% (4)
Small decline	19.9% (34)
Stay the same	40.4% (69)
Small increase	33.3% (57)
Large increase	4.1% (7)

Interest rates (Intensity Index Score = +25)

Large decline	0.6% (1)
Small decline	5.8% (10)
Stay the same	38.2% (66)
Small increase	54.3% (94)
Large increase	1.2% (2)

Gross sales/revenue (Intensity Index Score = +9)

Large decline	2.3% (4)
Small decline	17.2% (30)
Stay the same	43.7% (76)
Small increase	34.5% (60)
Large increase	2.3% (4)

Inflation/price of goods (Intensity Index Score = +40)

Large decline	1.2% (2)
Small decline	1.2% (2)
Stay the same	23.1% (40)
Small increase	66.5% (115)
Large increase	8.1% (14)

Contributions to non-profits (Intensity Index Score = -16)

Large decline	2.9% (5)
Small decline	33.3% (58)
Stay the same	57.5% (100)
Small increase	6.3% (11)
Large increase	0.0% (0)

The overall economy (Intensity Index Score = -3)

Large decline	2.3% (4)
Small decline	30.1% (52)
Stay the same	40.5% (70)
Small increase	26.6% (46)
Large increase	0.6% (1)

Section 2: Expectations for Sangamon County Economic Sectors

Over the next 12 months, what are your expectations for the 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 = +15)

Large decline	1.2% (2)
Small decline	19.2% (33)
Stay the same	32.0% (55)
Small increase	43.6% (75)
Large increase	4.1% (7)

Manufacturing (Intensity Index Score = -15)

Large decline	3.6% (6)
Small decline	31.9% (53)
Stay the same	55.4% (92)
Small increase	8.4% (14)
Large increase	0.6% (1)

Wholesale trade (Intensity Index Score = -8)

Large decline	2.4% (4)
Small decline	25.3% (42)
Stay the same	59.6% (99)
Small increase	10.6% (18)
Large increase	1.8% (3)

Retail trade (Intensity Index Score = +3)

Large decline	1.2% (2)
Small decline	22.8% (39)
Stay the same	46.2% (79)
Small increase	27.5% (47)
Large increase	2.3% (4)

Transportation/warehousing (Intensity Index Score = 0)

Large decline	0.6% (1)
Small decline	19.4% (32)
Stay the same	60.0% (99)
Small increase	19.4% (32)
Large increase	0.6% (1)

Finance/insurance/real estate (Intensity Index Score =+12)

Large decline	1.2% (2)
Small decline	15.4% (26)
Stay the same	43.2% (73)
Small increase	37.9% (64)
Large increase	2.4% (4)

Medical/health care (Intensity Index Score = +39)

Large decline	2.3% (4)
Small decline	5.3% (9)
Stay the same	22.8% (39)
Small increase	50.3% (86)
Large increase	19.3% (33)

Education/educational services (Intensity Index Score = -1)

Large decline	3.6% (6)
Small decline	15.0% (25)
Stay the same	63.5% (106)
Small increase	15.6% (26)
Large increase	2.4% (4)

Accommodations/food/entertainment/recreation (Intensity Index Score =+12)

Large decline	0.6% (1)
Small decline	15.4% (26)
Stay the same	44.4% (75)
Small increase	37.9% (64)
Large increase	1.8% (3)

Information and communications systems (Intensity Index Score = +17)

Large decline	0.6% (1)
Small decline	7.1% (12)
Stay the same	55.0% (93)
Small increase	32.5% (55)
Large increase	4.7% (8)

Business and professional support services (Intensity Index Score = +8)

Large decline	1.8% (3)
Small decline	10.1% (17)
Stay the same	60.7% (102)
Small increase	25.0% (42)
Large increase	2.4% (4)

Personal services (Intensity Index Score = +3)

Large decline	1.8% (3)
Small decline	13.1% (22)
Stay the same	62.5% (105)
Small increase	22.0% (37)
Large increase	0.6% (1)

What economic sector best describes your firm's primary economic activity:

Construction	10.0%(7)
Manufacturing	4.2%(3)
Wholesale trade	2.8%(2)
Retail trade	20.0%(14)
Transportation/warehousing	2.8%(2)
Finance/insurance/real estate	8.5%(6)
Medical/health care	7.1%(5)
Education/educational services	7.1%(5)
Accommodations/food/entertainment/recreation	10.0%(7)
Information and communications systems	5.7%(4)
Business and professional support services	8.5%(6)
Personal services	12.8%(9)

Section 3: Expectations for Your Business/Firm/Organization in 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 = +11)

Large decline	2.4% (4)
Small decline	12.5% (21)
Stay the same	53.0% (89)
Small increase	24.4% (41)
Large increase	7.7% (13)

Total number of employees (Intensity Index Score = +9)

Large decline	2.9% (5)
Small decline	9.4% (16)
Stay the same	55.3% (94)
Small increase	31.8% (54)
Large increase	0.6% (1)

Gross revenue/sales (Intensity Index Score = +15)

Large decline	3.6% (6)
Small decline	14.8% (25)
Stay the same	34.3% (58)
Small increase	43.2% (73)
Large increase	4.1% (7)

Profitability (Intensity Index Score = +8)

Large decline	4.2% (7)
Small decline	17.3% (29)
Stay the same	39.9% (67)
Small increase	36.3% (61)
Large increase	2.4% (4)

Overall status (Intensity Index Score = +11)

Large decline	2.4% (4)
Small decline	13.7% (23)
Stay the same	46.4% (78)
Small increase	34.5% (58)
Large increase	3.0% (5)

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

Inflation	10.9% (19)
Interest rates	11.4% (20)
Employee compensation/benefits	46.3% (81)
Consumer confidence/spending	34.3% (60)
Energy prices	16.0% (28)
Commodity prices	10.9% (19)
Availability of skilled/trained workers	29.1% (51)
Competition from local/state/national firms	29.7% (52)
Global competition	2.9% (5)
State government finances	32.0% (56)
Government regulations and taxation	46.3% (81)
(Health insurance/Obamacare/ACA)[6]	5.8% (10)

Section 4: Workforce Training Needs

Do you think increasing workforce/employment training programs is high priority, medium priority, low priority, or not a priority at all for Sangamon County?

High priority	23.8% (40)
Medium priority	42.8% (72)
Low priority	24.4% (41)
Not a priority at all	8.9% (15)

What do you think is the biggest problem, if any with current workforce/employment training programs in Sangamon County?

Cost	12.8% (21)
Accessibility of program (location, time)	4.2% (7)
Training not practical or hands-on	14.1% (23)
They do not offer the type of training needed for my sector	22.0% (36)
No problems with current training programs	17.1% (28)
Not familiar with current training programs	14.1(23)

[6] These were open-ended other responses coded into a category based on the number of respondents who chose to specify this as an "other."

Do you have any job openings that you are having difficulty filling right now?

Yes	31.9% (55)
No	66.2% (114)
Don't know	1.7% (3)

Now thinking about any previous or current positions your organization has had difficulty filling, please select the biggest challenge, if any, in filling the position.

Unqualified applicants (lack of skilled workers)	35.3% (53)
Applicants unwillingness to relocate	3.3% (5)
Pay expectations of applicants	17.3% (26)
Does not apply/ No recent job openings	18.6% (28)
Haven't had difficulty filling positions	25.3% (28)

How would you describe your current experience in finding qualified, skilled applicants?

Very easy	1.8% (3)
Somewhat easy	29.0% (48)
Somewhat hard	54.5% (90)
Very hard	14.5% (24)

How important, if at all, is employee training and development to the success of your business?

Very important	47.2% (78)
Somewhat important	29.0% (48)
Neither important nor unimportant	13.3% (22)
Somewhat unimportant	4.2% (7)
Very unimportant	6.0% (10)

What traits/characteristics are you most looking for in new employees? ***Please select all that apply***

Personal skills (work ethic, responsibility, integrity)	89.7%
Computer skills (word processing, programming, email)	29.7%
Business skills (budgeting, marketing, customer service)	20.6%
Communication skills (speaking, writing, working in teams)	55.4%
Computational skills (math, database management, graphs)	15.4%
Technical skills (specialized job skills, advanced degree or certificate)	38.9%
Other (please specify)	6.3%

Others mentioned: Commercial driver's license, TSA screening, positive attitude, engineering license, quality customer service, and skilled construction labor.

Survey Research Office

Center for State Policy & Leadership
University of Illinois Springfield

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