



REPORT ON THE ECONOMIC RECOVERY BUSINESS SURVEY

April 2021

PREPARED BY THE OFFICE OF THE REPUBLICAN POLICY CHAIRMAN
Rep. Martin Causer


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Economic Recovery Business Survey

After nearly a year of Pennsylvania businesses abiding by Governor Tom Wolf's mitigation orders that forced many to close or curtail the way they operate, the COVID-19 Economic Recovery Business Survey was unveiled by House Majority Leader Kerry Benninghoff, Majority Policy Committee Chairman Martin Causer and the Economic Recovery Task Force Chairman Rep. Aaron Kaufer.

The survey provided a voice for business owners who have shown their dedication to providing for their employees and communities during the midst of the pandemic. Through the survey, business owners could share their experiences with members of the General Assembly and offer feedback, advice and ideas that will allow the Legislature to work together with them to facilitate a robust economic recovery.



Economic Recovery Business Survey

Pennsylvania's working families, small businesses and job creators were hit hard by the economic impacts of the COVID-19 pandemic. The pandemic created unprecedented challenges, which were then exacerbated by Governor Wolf's unilateral shutdown orders.

As the end of the pandemic approaches and we strive to return to normalcy, Pennsylvania needs an aggressive economic recovery plan focused on growth, families and good-paying jobs. We can come back even stronger than before, but we will have to work together.

Republicans in the House of Representatives are working to get those impacted by the pandemic and the governor's orders back on their feet. We are asking you to help us develop a roadmap to a successful, sustainable, and robust recovery.

Please help us help you by completing this survey. No idea or topic is off limits, whether that be regulatory challenges, tax policy changes or workforce concerns. Your input is needed and highly valued.

We are glad you have chosen to do business in Pennsylvania. House Republicans want your business to stay here and prosper here for generations. Thank you for taking the time to participate.

*Notice: Responses provided pursuant to this survey may be subject to disclosure under the Act of Feb. 14, 2008 (P.L. 6, No. 3), known as the "Right-to-Know Law."

Business and industry owners were asked to participate in the survey through individual House member social media posts, alerts, emails, news releases, and by other outside business and

The survey asked business and industry respondents to share the challenges facing their business/industry, the type of assistance from the state that would be the most beneficial for their business, what change would have the greatest impact to their future success, and what other suggestions they have to offer to help kickstart the Commonwealth's economic recovery. The four following questions were asked:

- Questions 1: What do you want the state legislature to know about the challenges facing your business/industry?
- Question 2: What type of assistance from the state is the most critical/would be the most beneficial for your business?
- Question 3: What one change (regulatory, tax, etc.) would make the greatest impact to the future success of your business/industry?
- Question 4: What other suggestions do you have to kickstart the Commonwealth's economic recovery?

Microsoft Forms

PA
HOUSE
GOP

Economic Recovery
Business Survey

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1. Name

Enter your answer

2. Business

3/17/2021

Microsoft Forms

Enter your answer

3. Business Address

Enter your answer

4. Email

Enter your answer

5. Phone Number

Enter your answer

6. What do you want the state legislature to know about the challenges facing your business/industry?

Enter your answer

7. What type of assistance from the state is the most critical/would be the most beneficial for your business?

Enter your answer

3/17/2021

Microsoft Forms

8. What one change (regulatory, tax, etc.) would make the greatest impact to the future success of your business/industry?

Enter your answer

9. What other suggestions do you have to kickstart the Commonwealth's economic recovery?

Enter your answer

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The survey was made publicly available via www.pagoppolicy.com from February 17 through March 19. Submission deadline was March 19.

Purpose

This report is created by Chairman Martin Causer, House Majority Policy Committee, for the purpose of providing information to House Republican members about how businesses across the Commonwealth were impacted by COVID-19 and what the same business owners say they need to recover from the pandemic.

The findings in this report are intended to provide guidance and information to Republican House members as proposals are introduced and considered. The Economic Recovery Task Force will use this information to form public policy recommendations as we move toward economic recovery so Pennsylvania can become the “Envy of the East.”

The House Republican Caucus stands ready to work with members, business owners, manufacturers and all stakeholders to move our economy forward to ensure the success of our working families and job creators.

Data and Methodology

The data in this report is compiled from the responses to the survey questions. Overall, 961 survey responses were submitted. Of the 961 responses, 40 were excluded from final data calculations for being duplicate or non-business owner submissions leaving a total of 921 used to compile this report.

For this report, each response for every question was separated and categorized based on the specific response provided. Excluded from the data calculations were responses that did not share a commonly repeated subject and responses that did not correlate to the question asked. In these instances, the response was given a “miscellaneous” categorization. Likewise, the labeling of “miscellaneous” was also given to survey responses which were submitted in duplicate fashion by the same business owner and to surveys submitted by non-business owners.

Every survey question response had its own unique categorization used to breakdown and weigh survey responses. Overall, there were four questions on the survey. Responses to the first question were broken down into 11 categories, responses to the second question were labeled according to 15 categories, responses to the third questions were labeled according to 14 categories, and responses to the last question were separated into 13 categories.

Based on the business name, when submitted, each business response was labeled into a specific business classification. Overall, 17 business classification codes were used, including the “N” classification code for responses that were not identifiable. The average time to complete the survey was 58:16.

Key Findings

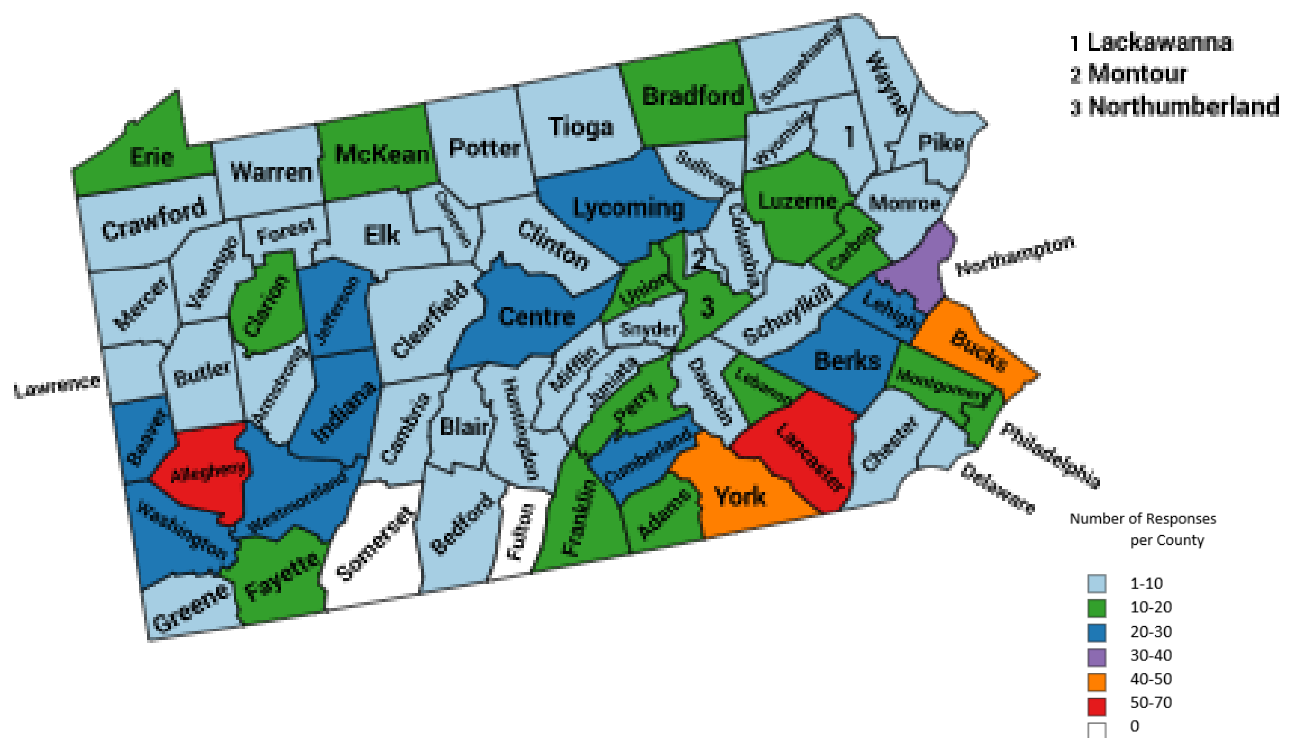
- In total, 921 business survey responses were used to compile this report.
- An overwhelming 31% of respondents indicated the biggest challenge facing their business was Governor Wolf’s mitigation orders.
- 191 respondents (21%) indicated financial issues and hardships were their greatest challenges.
- A plurality shared the need for financial assistance was the greatest assistance requested by business owners.
- 30% of respondents who shared financial assistance was their greatest request, also shared Governor Wolf’s mitigation orders are the biggest challenges facing their business.
- Tax reductions were the most often provided response on what change would have the greatest impact on a business.
- While 28% of respondents indicated tax reductions would have the greatest impact on their future success, another 22% of business owner respondents said their future success depends upon the Commonwealth removing restrictions and allowing them to fully open for business.
- Nearly a third (32%) of all respondents suggested the best way to kickstart the economy was for them to be open for business.
- Another 12% of respondents shared that financial assistance was needed to kickstart the economy.
- All but two counties were identified as being the home counties to participating business respondents.
- Of the 17 business categories used to describe survey respondents, food and dining accounted for 14% of all participating businesses.
- Nearly half (49%) of all respondents fell into one of five business categories: food and dining businesses, health and medicine businesses, construction and contractors, manufacturers, and personal care and service businesses.

Survey Data Results

Business Locations

Of the 921 responses to the Economic Recovery Business Survey, all but 60 could be identified as a business residing in a particular county. Those that were not able to be identified did not provide enough information for a home county to be named. All but two counties received at least one submission from a business owner. Table 1.1 shows the concentration of survey responses across the Commonwealth.

TABLE 1.1



The average number of responses per county was 14. The county with the largest number of survey responses was Allegheny at 70. Following Allegheny County, there was Lancaster County with 51, York County with 47, Bucks County with 47, and Northampton County with 36. No responses were submitted from the counties of Somerset and Fulton.

Business Categories

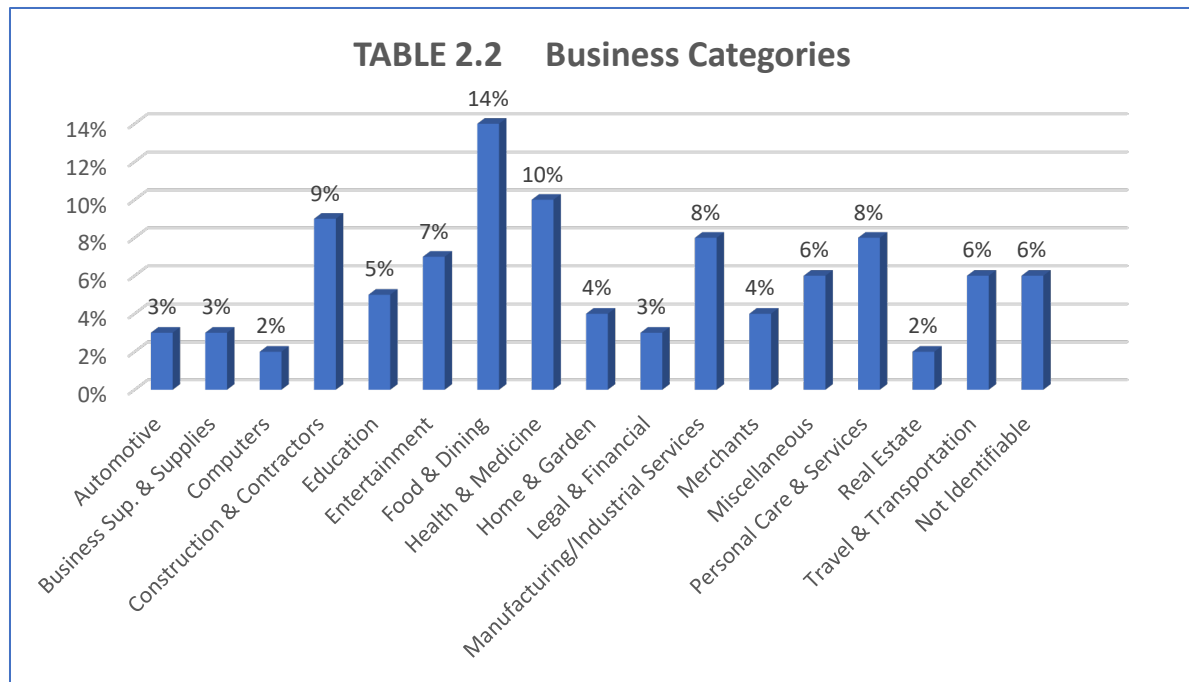
To provide an easier way to identify what types of businesses responded to the survey, 17 business categories were used. Table 2.1 shows the breakdown of how many and what types of business were put into each category. Businesses representing food and dining had the largest number of survey respondents with 131 responses. This accounts for 14% of all responses.

Business category respondents broke down into the following percentages:

- Automotive 3%
- Business Support 3%
- Computers 2%
- Construction 9%
- Education 5%
- Entertainment 7%
- Food & Dining 14%
- Health & Medicine 10%
- Home & Garden 4%
- Legal 3%
- Manufacturing 8%
- Merchants 4%
- Miscellaneous 6%
- Personal Care 8%
- Real Estate 3%
- Travel 6%
- Not Identifiable 5%

TABLE 2.1			
Main Category	Includes	Main Category	Includes
Automotive	Auto Dealers Service, Repairs & Parts	Home & Garden	Crafts Flower Shops Home Goods Home Improvements & Repairs Landscape & Lawn Services Security System & Services
TOTAL- 24		TOTAL- 41	
Business Support & Supplies	Consultants Employment Agency Marketing & Communications Office Supplies Printing	Legal & Financial	Accountants Attorneys Financial Institutions Insurance
TOTAL- 24		TOTAL- 24	
Computers	Computer Programming & Support Consumer Electronics & Repair	Manufacturing, Wholesale, Distribution, Industrial Services	Distribution, Import/Export Manufacturing Wholesale Forklift Services Industrial Equipment Repair
TOTAL- 17		TOTAL- 76	
Construction & Contractors	Architects, Surveyors Building Materials Construction Companies Electricians Engineer, Survey Plumbers Roofers	Merchants (Retail)	Cards & Gifts Clothing General
TOTAL- 79		TOTAL- 39	
Education	Adult & Continuing Education Early Childhood Education Daycare	Miscellaneous	Churches Civic Groups Miscellaneous Utility Companies Auctioneer Farming
TOTAL- 44		TOTAL- 60	
Entertainment	Artists Event Venues, Planners & Supplies Photography Productions	Personal Care & Services	Barber & Beauty Salons Dry Cleaners & Laundromats Exercise & Fitness Massage Sportsman
TOTAL- 68		TOTAL- 73	
Food & Dining	Restaurants Grocery Beverage & Wine Bakery	Real Estate	Agencies & Brokerage
TOTAL- 131		TOTAL- 23	
Health & Medicine	Assisted Living & Home Health Care Chiropractic Clinics & Medical Centers Dental Massage Therapy Nurse Mental Health Podiatry Physical Therapy	Travel & Transportation	Hotel, Motel & Extended Stay Transportation Travel & Tourism
TOTAL- 92		TOTAL- 55	
N	Not Identifiable		
TOTAL- 51			

Table 2.2 shows the total percentages of the business demographics of respondents whose survey responses were used to compile this report. Out of 921, there were 131 food and dining



businesses, 92 health and medicine businesses, 79 construction and contractors, 76 manufacturers, and 73 personal care and service businesses. These five business categories account for a combined 49% of all businesses whose survey responses were used to calculate this report.

Survey Question #1 Results

The first question on the survey asked, “What do you want the state legislature to know about the challenges facing your business/industry?” Of the 921 responses, 898 submitted a response to this question. Table 3.1 shows the statewide total number of the most common responses. Responses that did not share a commonly repeated subject were categorized as “miscellaneous.”

An overwhelming 31% of respondents indicated the biggest challenge facing their business was Governor Wolf’s mitigation orders. A total of 286 respondents shared experiences on how the Governor’s shutdown orders,

TABLE 3.1	
Challenge	Responses
Wolf’s Mitigation Orders	286
Financial Concerns	191
Customer Declines	102
Hiring Workers/Getting Back to Work	101
Miscellaneous	92
COVID Vaccinations/Test	34
Let Business Be	34
No Response	23
Against Minimum Wage	19
Supply Loss	21
Eviction	13
We are OK	5

restrictions, capacity limits, essential/non-essential business designations, among others has been devastating to their business operations.

191 respondents (21%) indicated financial issues and hardships were their greatest challenges. Many respondents expressed concern over the financial insecurities of their business future and the great income losses they experienced. Others shared the high cost to maintain COVID-19 safety measures and the increased expenses of doing business.

Responses about experiencing customer declines and hiring workers/getting people to go back to work were each reported by 11% of respondents as being a major challenge. Customer declines were described as a major concern by the tourism and business industries, small retail stores, daycare and learning centers, industrial distributors, real estate agents, manufacturers and event venues to name a few. Being unable to meet with clients, client cancelations, or people not purchasing business services were the typical references made regarding this concern.

In addressing employment issues, many business owners reflected on their inability to find qualified employees. A skilled labor force is a top concern. Many also expressed the challenge in getting people to come back to work during a time when the federal government has increased unemployment compensation payments.

About 4% of respondents shared their concerns about getting COVID-19 vaccinations in order to safely operate. Most shared they felt their industry could not function without having the vaccinations for their employees. The inability to obtain the vaccine and the challenges with limited vaccine supply were discussed.

Another 4% shared the challenges they face were due to orders by the Commonwealth that will not allow them to operate. In these instances, typically these individuals shared that business owners were capable of making smart business decisions that include following appropriate federal guidelines in order to operate. They often asked for the economy and for every business to be open.

TABLE 3.2 Statewide: Challenges Facing Your Business

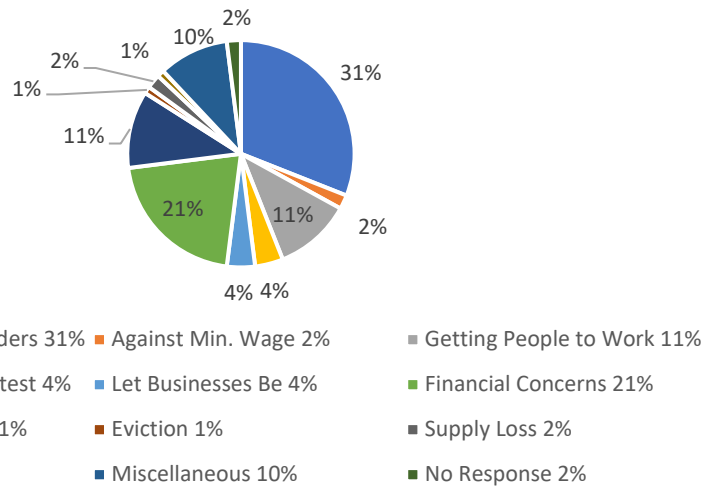


Table 3.2 shows the statewide total percentages of the most common responses to the survey question, “What do you want the state legislature to know about the challenges facing your business/industry?”

Survey Question #2 Results

The second question to the survey asked, “What type of assistance from the state is the most critical/would be the most beneficial for your business?” Of the 921 responses, 895 submitted a response to this question. Table 4.1 shows the statewide total number of the most common responses. Responses that did not share a commonly repeated subject were categorized as “miscellaneous.”

TABLE 4.1

Critical/Beneficial Assistance Requested	Responses
Grants, Loans, Financial	334
Open Businesses Up	166
Miscellaneous	93
Less Regulations	78
Reduce Taxes	69
Promote Working	48
COVID Vaccinations	38
No Response	26
Incentives	18
Eviction/Rental	16
Unemployment Compensation	16
Buy PA/ Buy Local	7
Lawsuit Protections	5
Broadband Internet	4
Do Not Increase Minimum Wage	3

A plurality said the need for financial assistance was the greatest assistance requested by business owners. 334 business owners asked the General Assembly for some form of financial assistance. Low-interest loans and grants were the most common forms of financial assistance mentioned.

Other forms of financial assistance requested include loan forgiveness on previously disbursed pandemic loans, state and federal tax-free grants and loans, utility assistance payments, hazard pay, payroll assistance, and tax holidays to name a few. It is important to note, 30% of respondents who shared financial assistance was the greatest assistance they

could receive, also shared Governor Wolf's mitigation orders are the biggest challenge facing their business.

Meanwhile, 18% of respondents pleaded for Pennsylvania to open things up. Most business owners expressed their desire for the Commonwealth to allow them to fully open and get back to business.

The call for lessening regulations was given by 8% of survey respondents. Aside from requests to end lock down restrictions placed on businesses, many business owners provided examples of overbearing regulations they wanted to loosen or eliminate. Examples include regulations involving the permitting process, waiving restrictions on permits for environmental restoration projects, revising the bidding/contracting process, reducing expensive regulations, modifying the prevailing wage regulations, reducing regulations on seasonal businesses, water testing regulations and health care regulations.

For 7% of business owners, the most critical assistance they said they needed was a significant reduction in taxes. While respondents who said they needed a tax break did not specify what tax reduction in particular, a few did reference school taxes, small business taxes, corporate net income taxes, tax credits for PPP-related expenses, tax credits for charitable donations, citizen tax credits for shopping local, tax exemptions for investors, sales tax forgiveness and gas taxes.

A common theme among the 5% who shared the most critical assistance their business could be given was to encourage people to work was concerns of the increased federal unemployment compensation payments encouraging people to stay home and not work. By not working, operations for businesses were being impacted. In addition, some shared the belief that hiring qualified staff was already an issue but coupled with the increased unemployment compensation, hiring is impossible. Most want these payments to stop so families can begin to recover by going back to work.

TABLE 4.2 Statewide: Most Critical/Beneficial Assistance

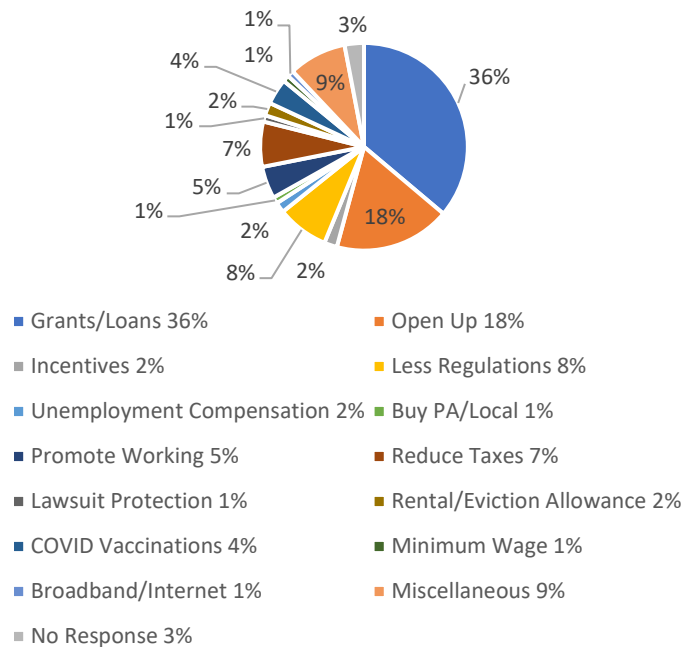


Table 4.2 shows the statewide total percentages of the most common responses to the survey question, “What type of assistance from the state legislature is the most critical/would be the most beneficial for your business?”

Survey Question #3 Results

The third question to the survey asked, “What one change (regulatory, tax, etc.) would make the greatest impact to the future success of your business/industry?” Of the 921 responses, 865 submitted a response to this question. Table 5.1 shows the statewide total number of the most common responses. Responses that did not share a commonly repeated subject were categorized as “miscellaneous.”

Tax reductions was the most often provided response on what change would have the greatest impact on a business. With over 256 businesses (28%) suggesting tax reductions would provide them the greatest impact on their future success, the types of tax reductions mentioned were numerous.

Examples include lowering the tax rate by half for the tax year 2020, eliminating all taxes for a year, payroll tax relief, income

TABLE 5.1	
Impacting Future Success	Response
Tax Reductions	256
Open Businesses Up	203
Miscellaneous	140
Financial Assistance	98
No Response	56
Do Not Increase Minimum Wage	49
Getting Back to Work	31
Regulatory Reforms	21
COVID Vaccinations	17
Hiring Support	16
Insurance Issues	15
Safety Measures	8
Rent Assistance/Eviction Allowances	6
Renewable Energy	5

tax reductions, simplifying the sales tax, tax credits, similar investments to EITC, property and school taxes, offering free tax services, eliminating occupational taxes, suspending tax on alcohol, and eliminating gasoline and entertainment taxes. It is interesting to note 40% of those who indicated tax reductions would impact their future success the most also indicated the types of assistance that would help them the most were to receive either grants or loans.

Still 22% of business owner respondents said their future success depends upon the Commonwealth removing restrictions and allowing them to fully open for business. Calls to “let us work...let us open” were typical responses provided. While most indicated they wanted the state to fully open, a few suggested easing seating capacity or gathering restrictions.

About 10% of respondents suggested the greatest impact on their future success would be receiving financial assistance. Some forms of financial assistance referenced include small business loans, business grants, loan forgiveness, refunding alcohol tax, childcare subsidies, other grants in support of local businesses, increasing Medical Assistance reimbursements, regulatory fine sanctions, incentives for hiring, health care benefit assistance, and rent relief.

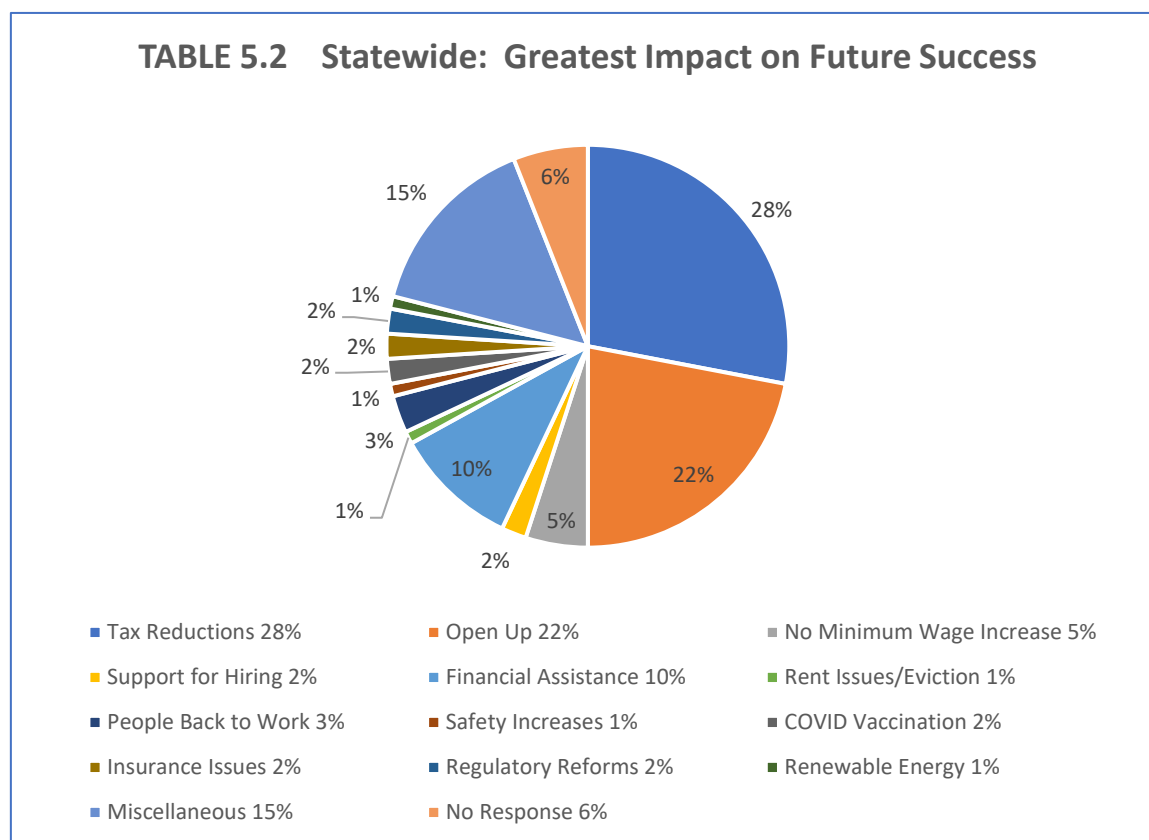


Table 5.2 the statewide total percentages of the most common responses to the survey question, “What one change (regulatory, tax, etc.) would make the greatest impact to the future success of your business/industry?”

Survey Question #4 Results

The fourth question to the survey asked, “What other suggestions do you have to kickstart the Commonwealth’s economic recovery?” Of the 921 responses, 802 submitted a response to this question. Table 6.1 shows statewide the total number of the most common responses. Responses that did not share a commonly repeated subject were categorized as “miscellaneous.”

Nearly a third (32%) of all respondents suggested the best way to kickstart the economy was for them to be open for business. These business owners want to be able to operate. Essentially, they want government to let responsible business owners run their businesses and employ their workers. The best kickstart to the economy is to let businesses do what they do best. These business owners were consistent since 32% of these 291 respondents also indicated the greatest impact on their business success was for restrictions to be removed and businesses be open.

12% of responders indicated financial assistance was their top suggestion for kickstarting the Commonwealth’s economic recovery. Ideas on the types of financial assistance suggested varied. Some examples of financial assistance mentioned include: assistance based on the business size for the months businesses were shut down, assistance to small businesses (under 25 employees), incentives for shopping with small businesses, grants to offset losses, grants to pay employees, grants to pay rent and utility bills, state issued PPP loans to generate business and recover lost revenue, rent relief to businesses and mortgage relief to landlords, assistance to businesses impacted by quarantined employees, PPE expense relief, and loan forgiveness.

With 7% of the total responses, business owners believed lower taxes are needed in order to kickstart the economy. A few suggested a sales tax moratorium to help consumers buy from small local places. Many expressed opposition to raising taxes. Some of the tax options discussed include reducing property taxes or gasoline taxes, no tax implementation on businesses during the time of their closure, allowing a percentage of state sales taxes paid to be credited toward personal income taxes, and tax incentives for hiring.

Responses addressing the call to getting people back to work often centered on eliminating the incentives for people not to work. For many business owners this means doing away with the increased federal unemployment compensation payments. These incentives are discouraging to some businesses that have job openings but are unable to fill these vacancies. Some of the shared

TABLE 6.1

Kickstart the Economy	Response
Open Businesses Up	291
No Response	119
Financial Assistance	114
Miscellaneous	101
Tax Reductions	70
Getting Back to Work	58
More Responsive Govt	48
COVID Vaccinations	46
Remove Wolf	33
Buy PA/ Buy Local	19
Do Not Increase Minimum Wage	10
Legalize Marijuana	7
Regulatory Reforms	5

ideas on how the Commonwealth can encourage people to get back to work include increasing funding for apprenticeship training, fixing the unemployment system, encouraging people to enter the trade professions, focusing on age gaps for employment, requiring people to return to work when their job is available, training for rural hospitals, and decreasing unemployment compensation payments.

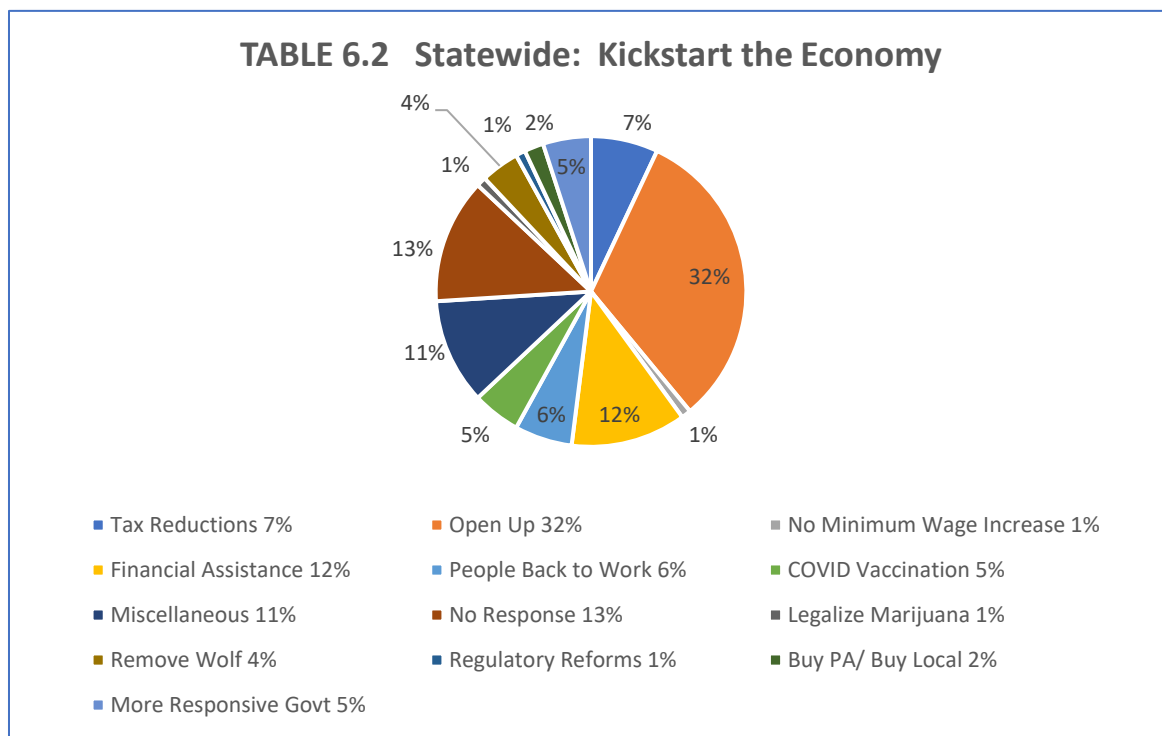


Table 6.2 the statewide total percentages of the most common responses to the survey question, “What other suggestions do you have to kickstart the Commonwealth’s economic recovery?”

Regional Comparisons

For purposes of this section of the report, after a business was designated to be located within a certain legislative district, the regional caucus assignment of the House member to the legislative district was used to designate the business region.

Northwest Region

The first question of the survey asked, “What do you want the state legislature to know about the challenges facing your business/industry?” Table 3.2 shows the statewide total percentages of the most common responses to this survey question. Table 7.1 shows the northwest total percentages of the same question.

TABLE 3.2 Statewide: Challenges Facing Your Business

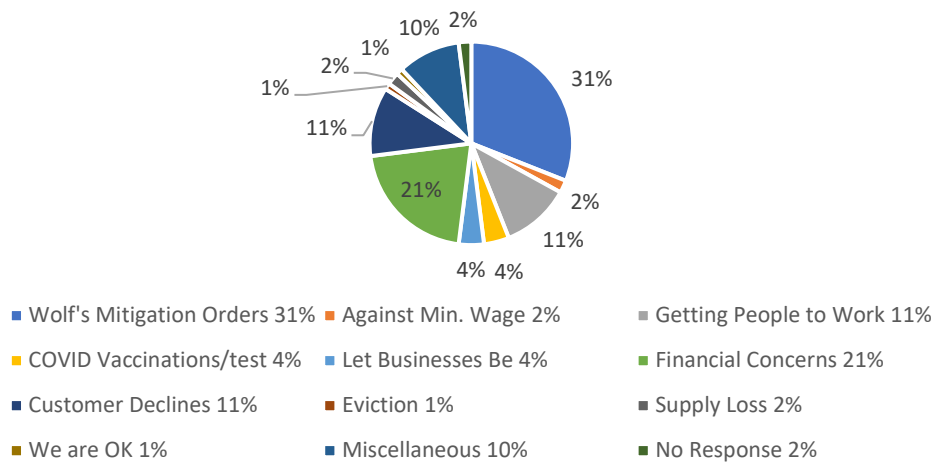
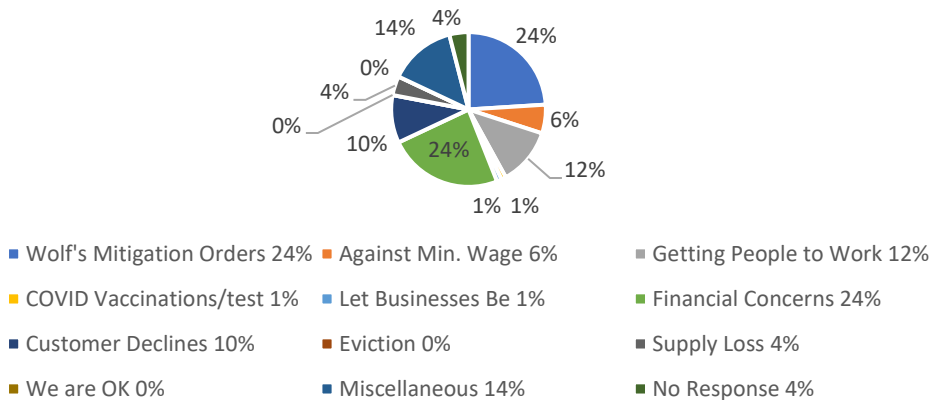


TABLE 7.1 Northwest: Challenges Facing Your Business



By comparison, in the northwest there is a split between the governor’s mitigation orders and financial concerns as being the biggest challenges facing business owners. On the statewide percentage breakdown, the majority indicated the governor’s mitigation orders as their biggest challenge. Unlike the statewide responses, no business in the northwest indicated challenges dealing with evictions, nor did any share they were currently doing okay.

The second question of the survey asked, “What type of assistance from the state is the most critical/would be the most beneficial for your business?” Table 4.2 shows the statewide total percentages of the most common responses to this survey question. Table 7.2 shows the northwest total percentages of the same question.

The northwest and statewide responses closely align regarding the top types of assistance requested by business owners. One difference worth highlighting is a stronger call for broadband in the northwest in comparison to the rest of the Commonwealth.

TABLE 4.2 Statewide: Most Critical/Beneficial Assistance

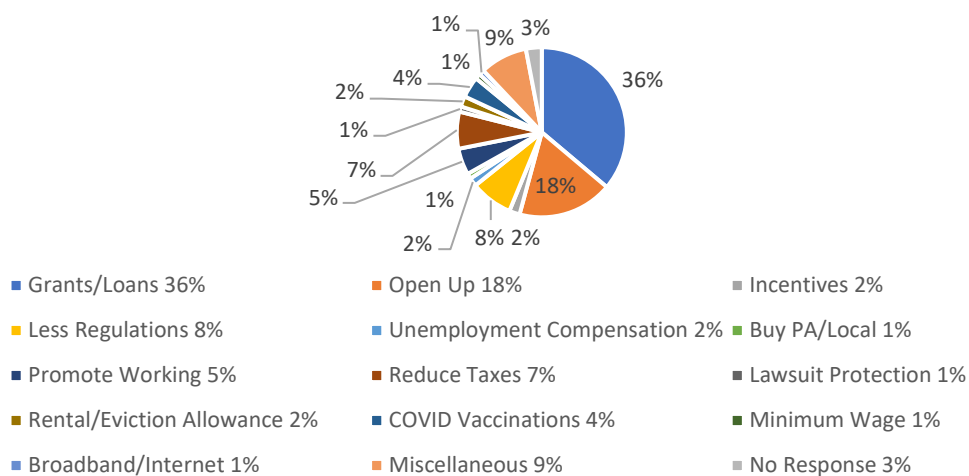
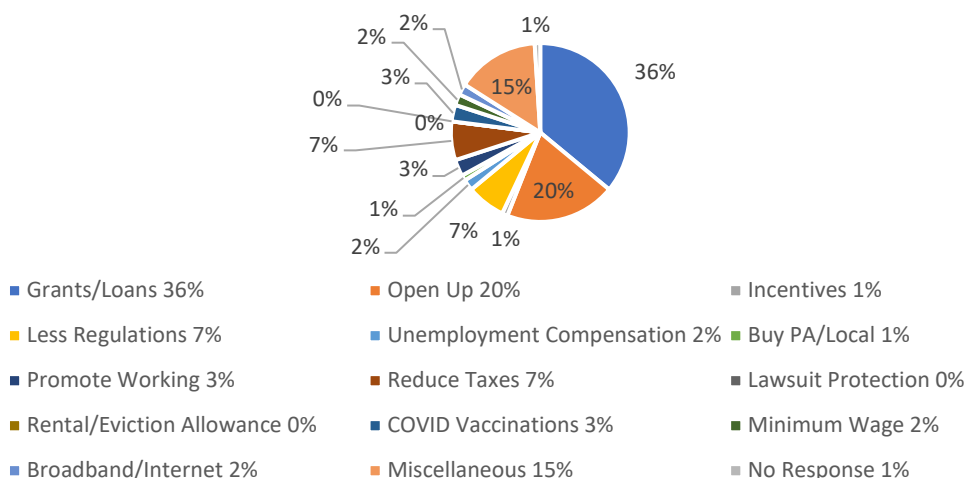


TABLE 7.2 Northwest: Most Critical/Beneficial Assistance



The third question of the survey asked, “What one change (regulatory, tax, etc.) would make the greatest impact to the future success of your business/industry?” Table 5.2 shows the statewide total percentages of the most common responses to this survey question. Table 7.3 shows the northwest total percentages of the same question.

TABLE 5.2 Statewide: Greatest Impact on Future Success

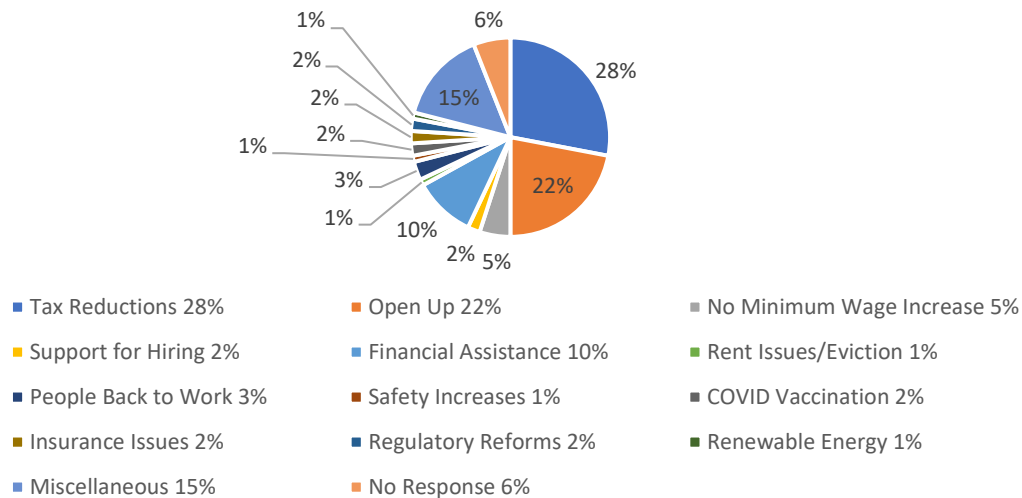
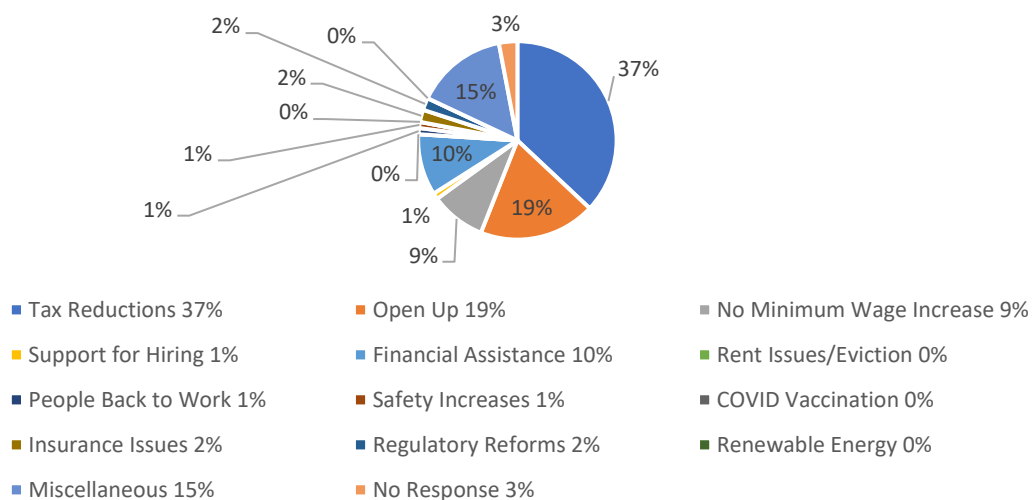


TABLE 7.3 Northwest: Greatest Impact on Future Success



Northwest business owners shared similar responses to what the greatest impact would be for their business as did statewide business owners. There was a higher percentage (37%) of respondents in the northwest who indicated tax reductions would be the greatest impact in comparison to the statewide percentage (28%) of respondents. Additionally, respondents in the

northwest were more concerned about the impact on their business of Governor Wolf's minimum wage increase proposal.

The fourth question of the survey asked, "What other suggestions do you have to kickstart the Commonwealth's economic recovery?" Table 6.2 shows the statewide total percentages of the most common responses to this survey question. Table 7.4 shows the northwest total percentages of the same question

TABLE 6.2 Statewide: Kickstart the Economy

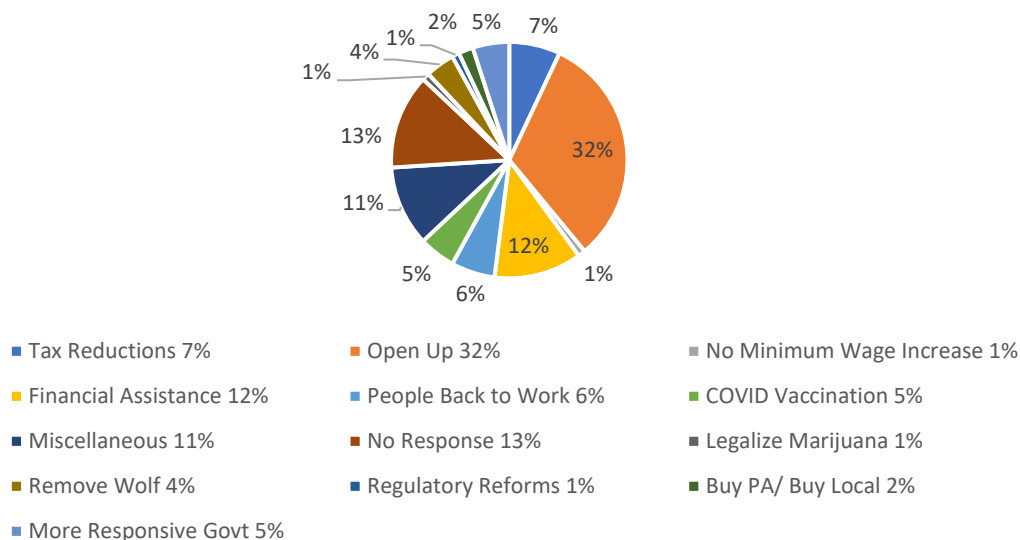
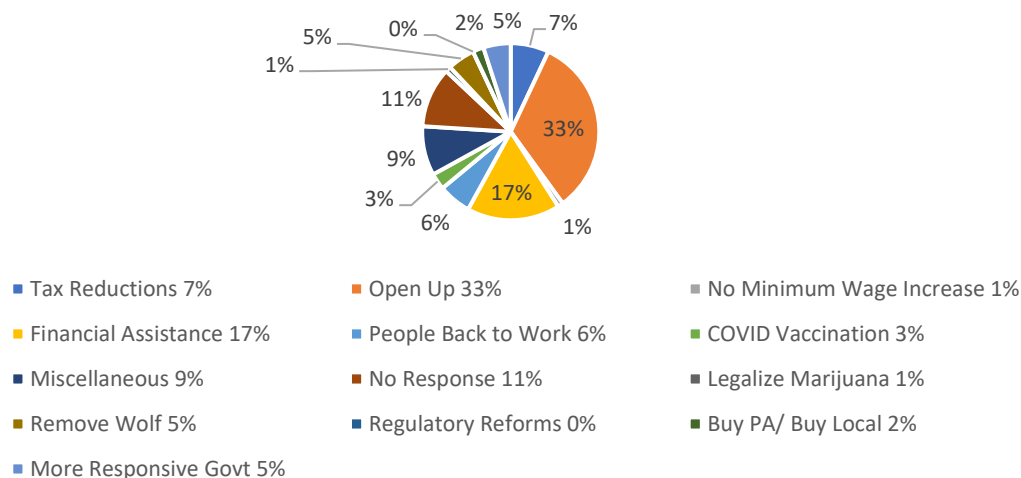


TABLE 7.4 Northwest: Kickstart the Economy



While the northwest shared the same top two most given responses to the question (opening the Commonwealth up for business and financial assistance), they did have a greater percentage (17% for the northwest compared to 12% statewide) of responses recognizing financial assistance as the way to kickstart the economy. The same percentage of respondents in the

northwest were also suggestive of a “buy Pennsylvania or buy from local small business” initiative as a good means to kickstart the economy.

Southwest Region

The first question of the survey asked, “What do you want the state legislature to know about the challenges facing your business/industry?” Table 3.2 shows the statewide total percentages of the most common responses to this survey question. Table 8.1 shows the southwest total percentages of the same question.

TABLE 3.2 Statewide: Challenges Facing Your Business

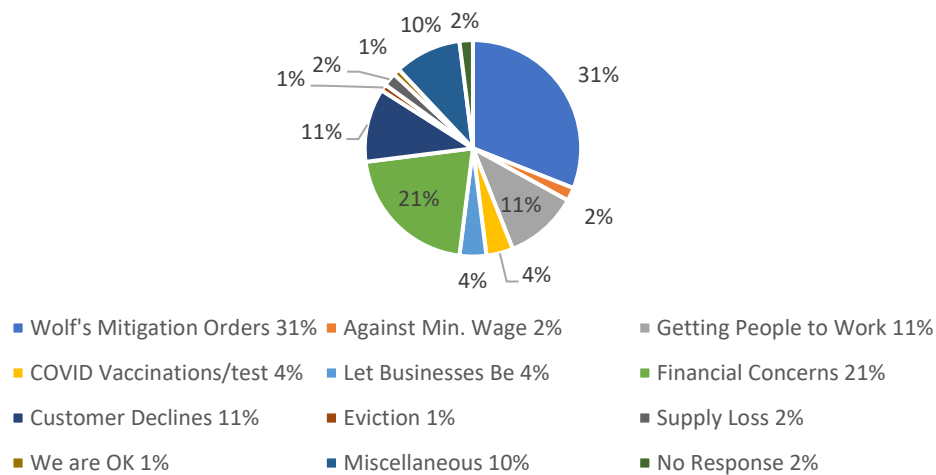
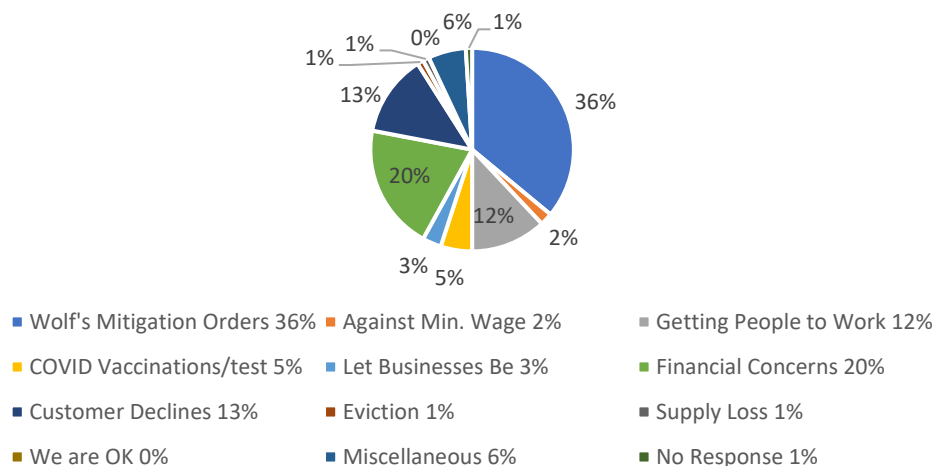


TABLE 8.1 Southwest: Challenges Facing Your Business



Both the statewide and southwest tables show the greatest challenges facing businesses were the governor's mitigation orders. Similarly, both the statewide and southwest region shared financial concerns as the second most indicated challenge and getting people back to work as the third most indicated challenge. The southwest percentage breakdown for this question closely resembles the statewide percentage breakdown.

The second question of the survey asked, "What type of assistance from the state is the most critical/would be the most beneficial for your business?" Table 4.2 shows the statewide total percentages of the most common responses to this survey question. Table 8.2 shows the southwest total percentages of the same question.

TABLE 4.2 Statewide: Most Critical/Beneficial Assistance

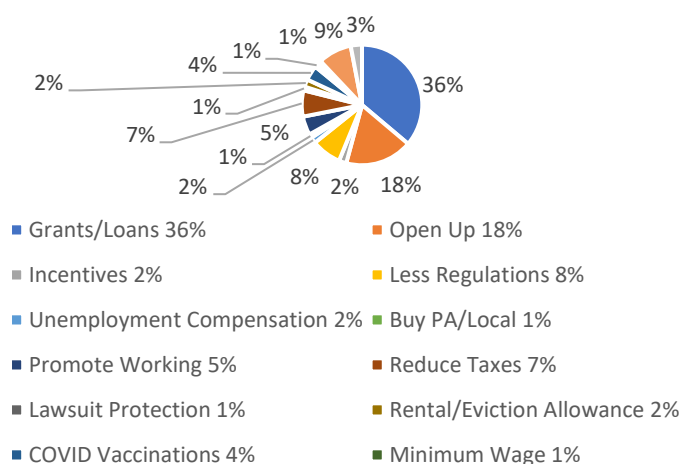
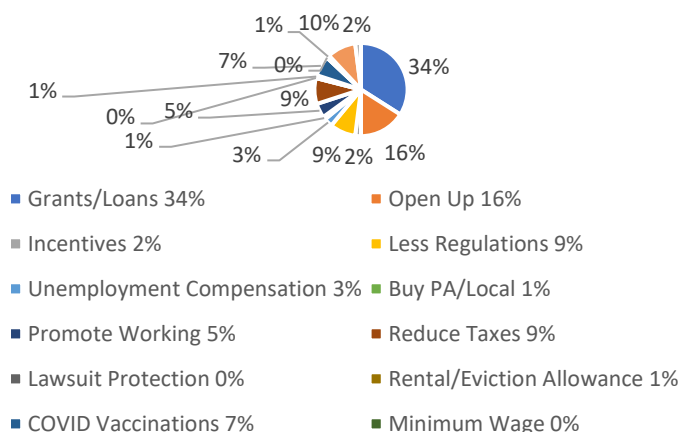


TABLE 8.2 Southwest: Most Critical/Beneficial Assistance



Regarding the type of assistance requested by business owners in the southwest, the most frequent type of assistance requested slightly mirrors those requested by statewide business

owners. The top three most requested types of assistance deemed to be the most critical are grants/loans, allowing businesses to open, and less regulations. Worth noting is that reducing taxes had about the same percentage of references as requesting less regulations.

The third question of the survey asked, “What one change (regulatory, tax, etc.) would make the greatest impact to the future success of your business/industry?” Table 5.2 shows the statewide total percentages of the most common responses to this survey question. Table 8.3 shows the southwest total percentages of the same question.

TABLE 5.2 Statewide: Greatest Impact on Future Success

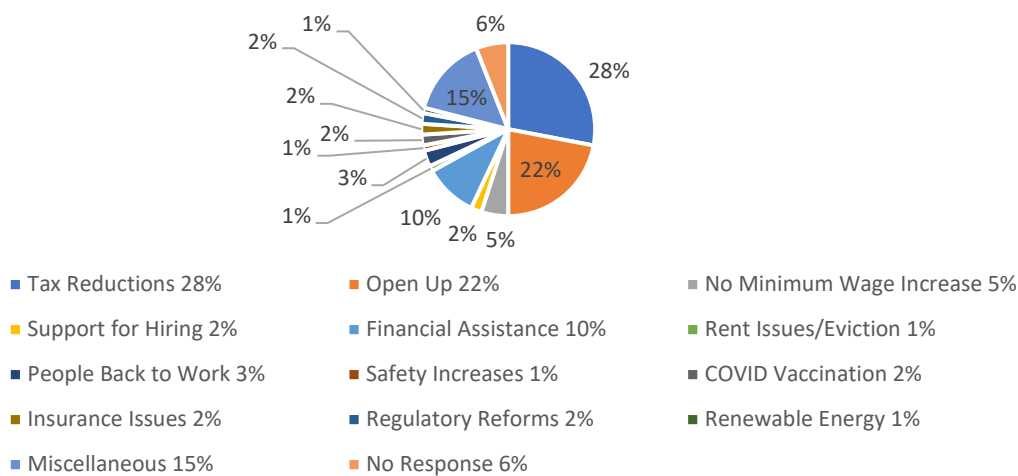
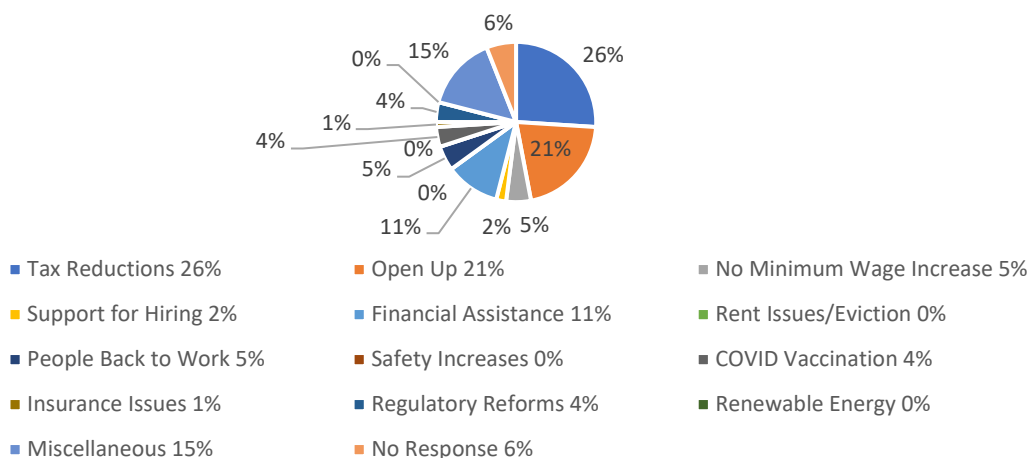


TABLE 8.3 Southwest: Greatest Impact on Future Success



While differing in percentages, southwest business owners followed similar priorities in naming what would have the greatest impact on their future success. They too indicated tax reductions, opening for business and financial assistance would help them. No southwest business owners referenced rent or eviction issues, safety increases or renewable energy.

The fourth question of the survey asked, “What other suggestions do you have to kickstart the Commonwealth’s economic recovery?” Table 6.2 shows the statewide total percentages of the most common responses to this survey question. Table 8.4 shows the southwest total percentages of the same question

TABLE 6.2 Statewide: Kickstart the Economy

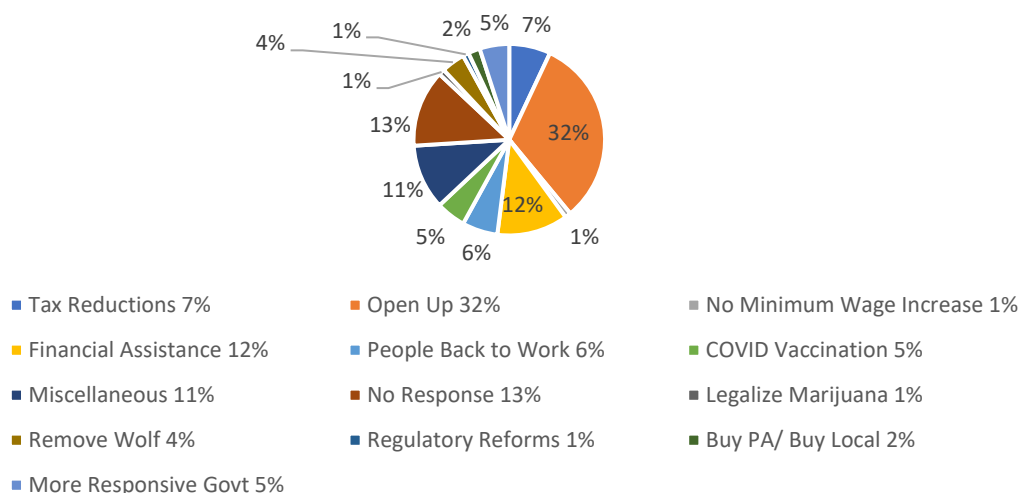
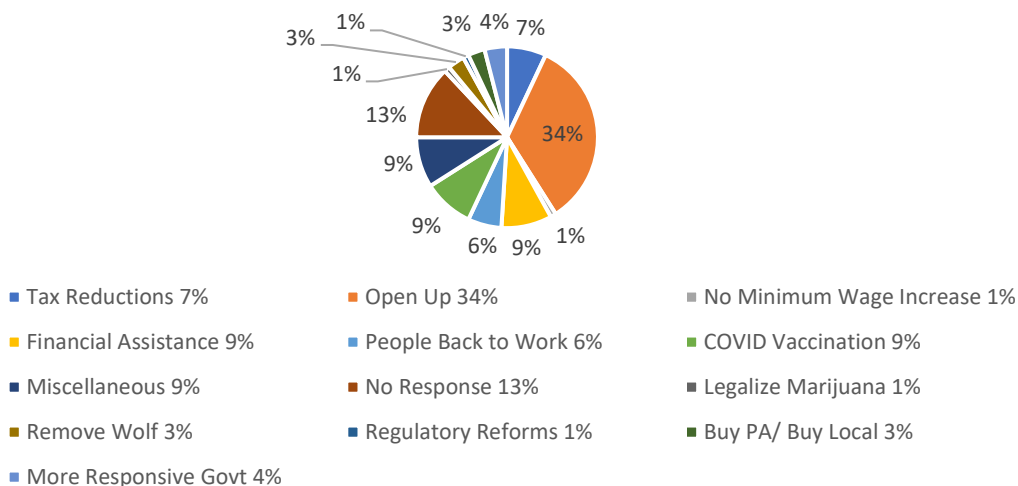


TABLE 8.4 Southwest: Kickstart the Economy



While opening the Commonwealth for business remains the top method to kickstart the economy for both statewide business owner respondents and southwest business owner respondents, financial aid and getting the COVID-19 vaccination out to citizens tied for the second most given response. In the southwest, the COVID-19 vaccination response received 9% of the responses while at the statewide level it received 5%. A higher percentage of respondents also gave the response of a “buy Pennsylvania or buy from local small business” initiative as a good means to kickstart the economy.

Northeast Region

The first question of the survey asked, “What do you want the state legislature to know about the challenges facing your business/industry?” Table 3.2 shows the statewide total percentages of the most common responses to this survey question. Table 9.1 shows the northeast total percentages of the same question.

TABLE 3.2 Statewide: Challenges Facing Your Business

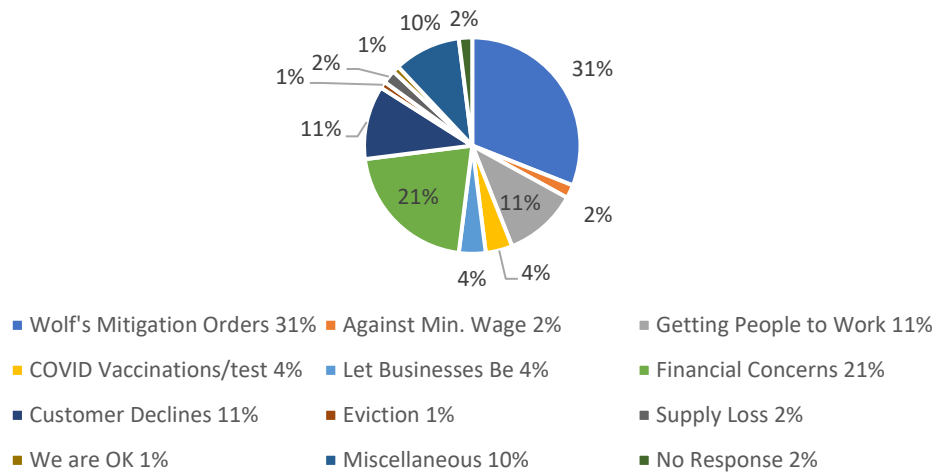
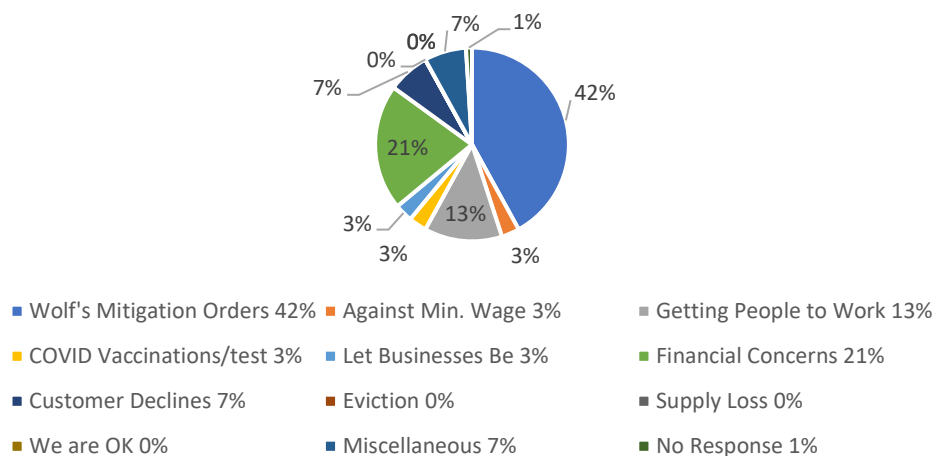


TABLE 9.1 Northeast: Challenges Facing Your Business



When compared to the statewide table, the challenges facing the northeast share a similar trend to the statewide challenges. Both primarily indicate the governor’s mitigation orders are the top challenges facing businesses and cite financial concerns and getting people back to work as the next top challenges.

Both the statewide and northeast tables show the greatest challenges facing businesses are the governor's mitigation orders. Similarly, both the statewide and northeast regions shared financial concerns as the second most indicated challenge and getting people back to work as the third most indicated challenge. The northeast percentage breakdown for this question closely resembles the statewide percentage breakdown. The major difference with the northeast is there was no major mentions of supply losses or eviction concerns.

The second question of the survey asked, "What type of assistance from the state is the most critical/would be the most beneficial for your business?" Table 4.2 shows the statewide total percentages of the most common responses to this survey question. Table 9.2 shows the northeast total percentages of the same question.

TABLE 4.2 Statewide: Most Critical/Beneficial Assistance

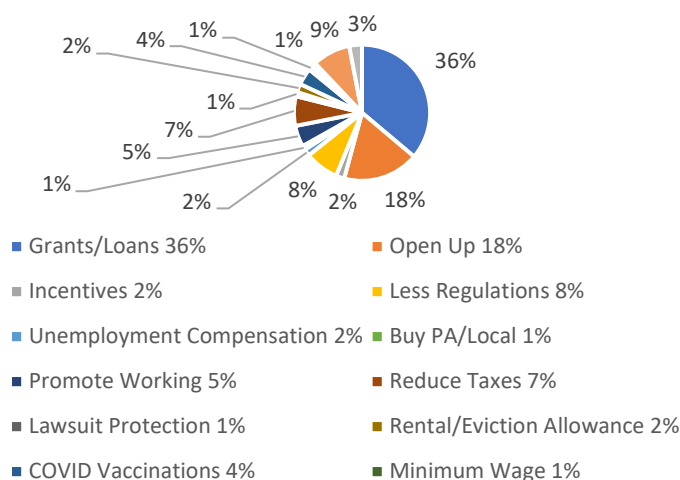
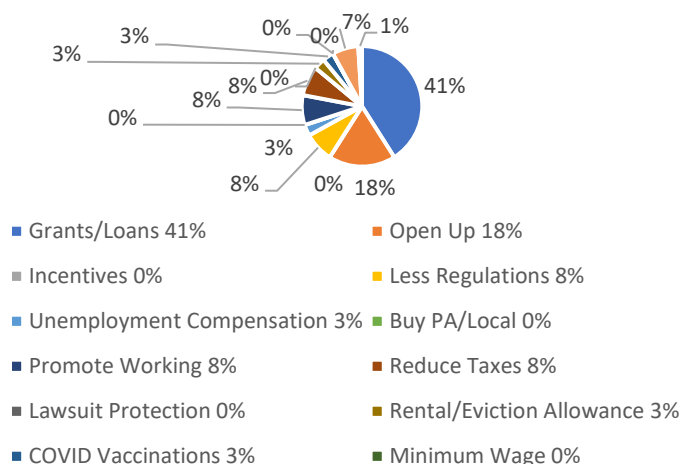


TABLE 9.2 Northeast: Most Critical/Beneficial Assistance



In comparison to statewide responses, northeast businesses also consider grants and loans to be the most critical form of assistance they need. They, too, want the Commonwealth to open so they can go about their business operations. One difference between the statewide level of response and the northeast level is a higher percentage of northeast business owners responded that the greatest impact on their future success would be for people to return to work. There is also a higher call for financial assistance in the northeast.

The third question of the survey asked, “What one change (regulatory, tax, etc.) would make the greatest impact to the future success of your business/industry?” Table 5.2 shows the statewide total percentages of the most common responses to this survey question. Table 9.3 shows the northeast total percentages of the same question.

TABLE 5.2 Statewide: Greatest Impact on Future Success

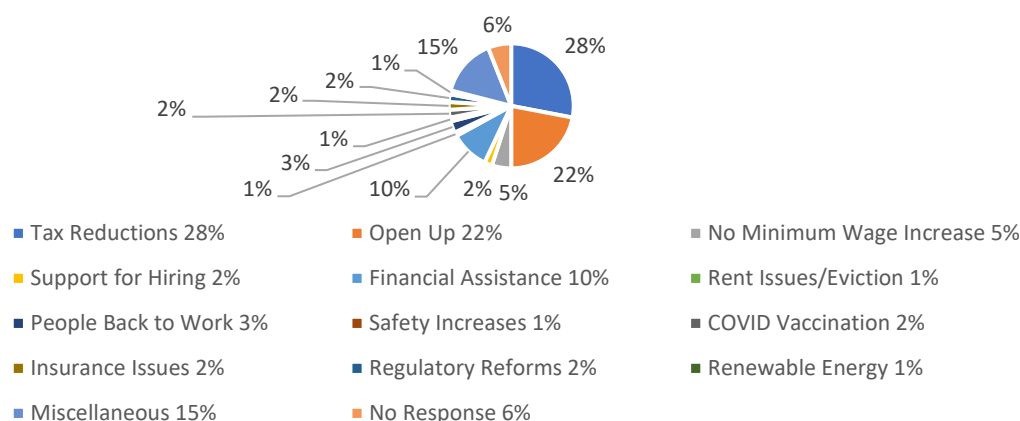
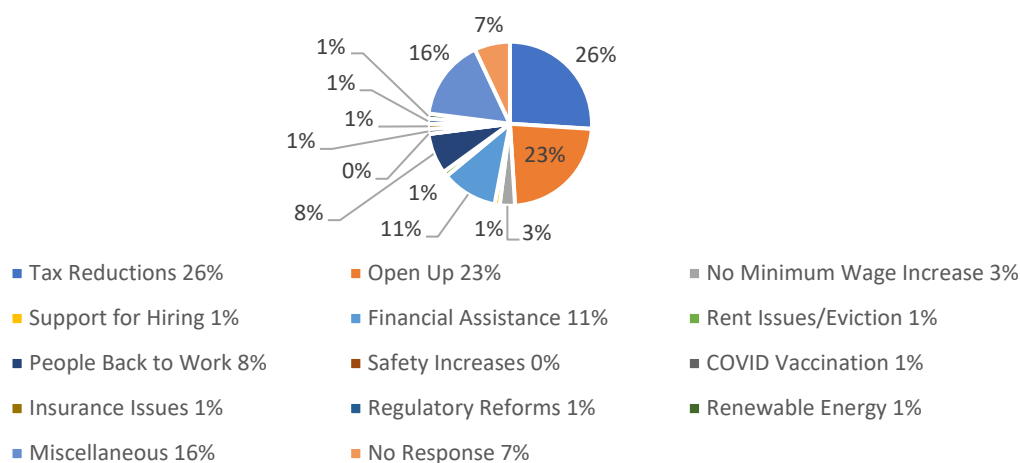


TABLE 9.3 Northeast: Greatest Impact on Future Success



Tax reductions, opening the Commonwealth for business and financial assistance are the top three responses provided by both statewide respondents and northeast business owners. Perhaps one impact that is of greater concern for northeast business owners than those statewide is getting people back to work. On a statewide level, getting people back to work was indicated as a great impact by 3% of the responses while in the northeast it was more than double with 8% of responses.

The fourth question of the survey asked, “What other suggestions do you have to kickstart the Commonwealth’s economic recovery?” Table 6.2 shows the statewide total percentages of the most common responses to this survey question. Table 9.4 shows the northeast total percentages of the same question

TABLE 6.2 Statewide: Kickstart the Economy

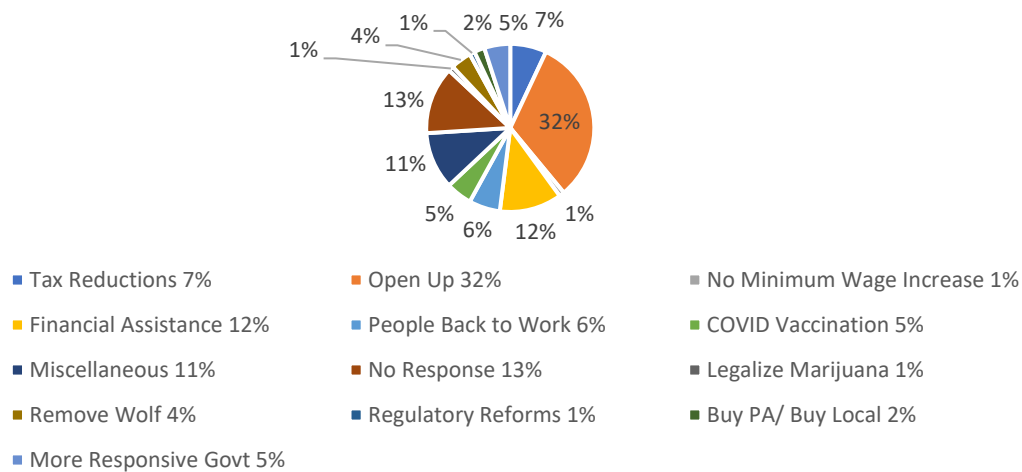
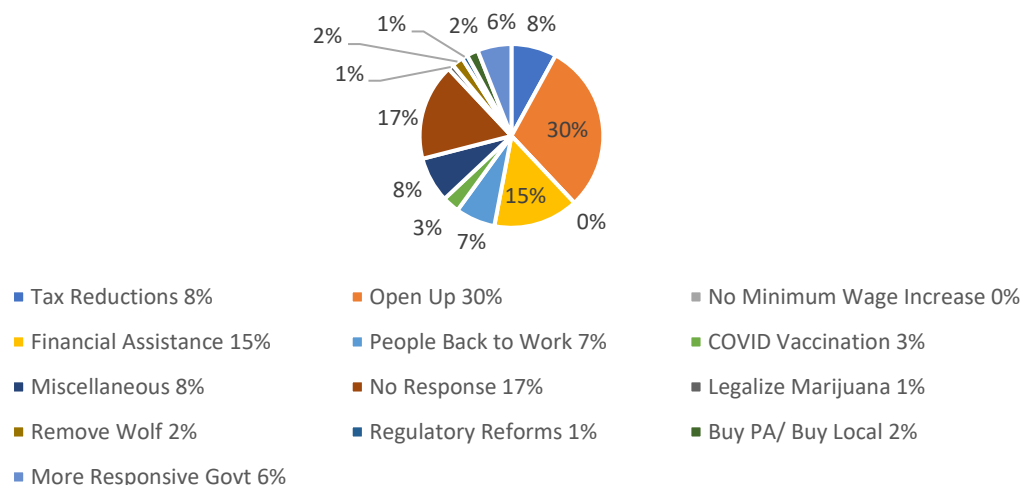


TABLE 9.4 Northeast: Kickstart the Economy



For northeast respondents and statewide respondents, the top three responses given to kickstart the economy are the same-- opening the Commonwealth for business, financial assistance and tax reductions. There is a slightly higher percentage of northeast respondents who indicated financial assistance is the best means to kickstart the economy. In the northeast 15% of respondents provided this response while 12% of statewide respondents did.

East Central Region

The first question of the survey asked, “What do you want the state legislature to know about the challenges facing your business/industry?” Table 3.2 shows the statewide total percentages of the most common responses to this survey question. Table 10.1 shows the east central total percentages of the same question.

TABLE 3.2 Statewide: Challenges Facing Your Business

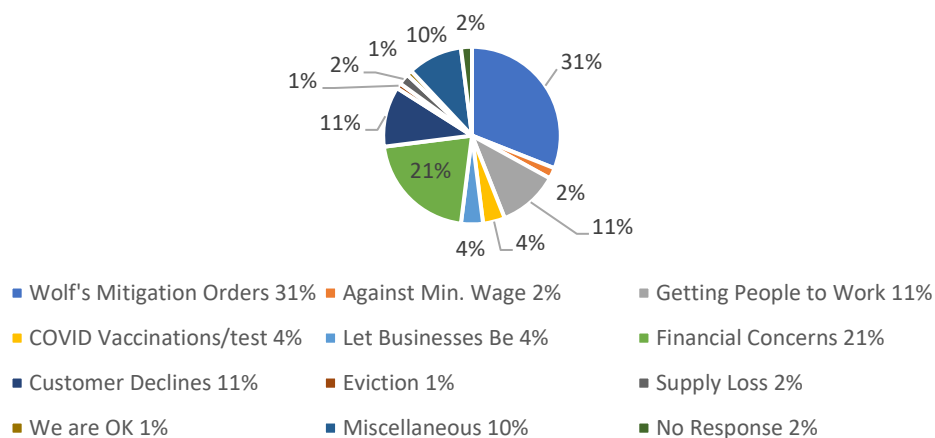
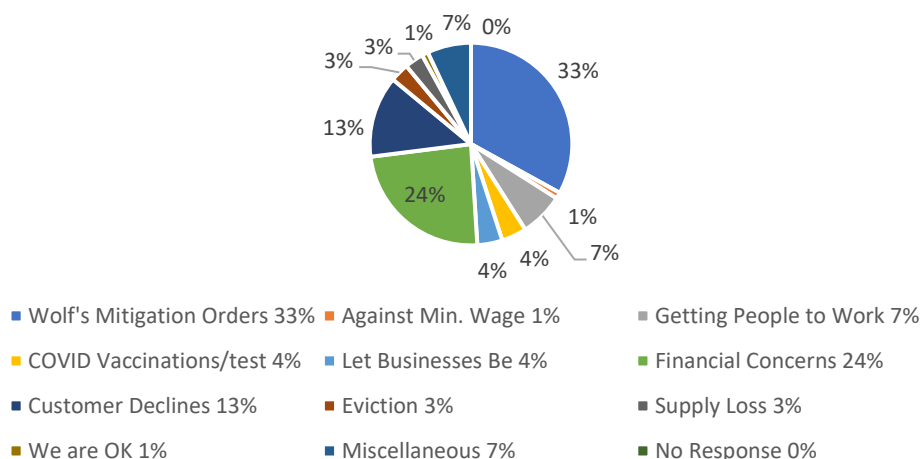


TABLE 10.1 East Central: Challenges Facing Your Business



Like statewide business owner challenges, the top two challenges facing business owners in the east central region are also the governor's mitigation orders and financial concerns. Unlike the statewide business owners, east central business owners shared more challenges with customer declines than with the challenges of getting people back to work.

The second question of the survey asked, "What type of assistance from the state is the most critical/would be the most beneficial for your business?" Table 4.2 shows the statewide total percentages of the most common responses to this survey question. Table 10.2 shows the east central total percentages of the same question.

TABLE 4.2 Statewide: Most Critical/Beneficial Assistance

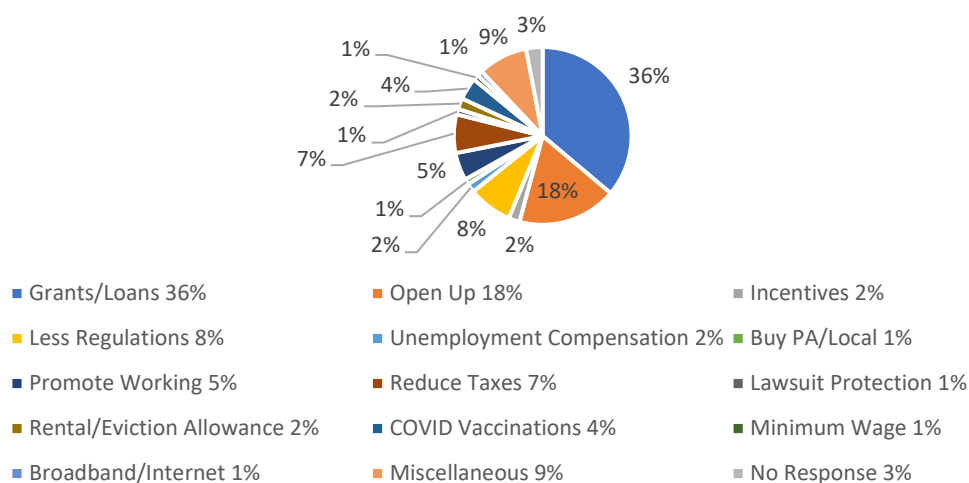
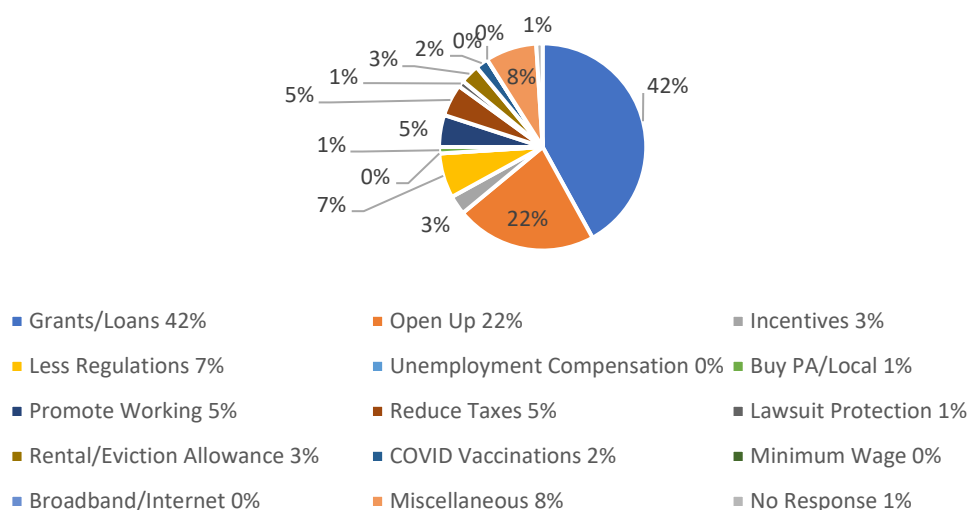


TABLE 10.2 East Central: Most Critical/Beneficial Assistance



While the top two most requested forms of assistance requested in the east central are also the top two for the state (grants/loans and opening for business), there is a stronger percentage majority of business owners in the east central who are requesting both. 42% of business owners

in the east central were requesting some form of financial assistance (statewide it was 36%) and 22% of east central business owners wanted the Commonwealth to open for business (compared to 18% statewide).

The third question of the survey asked, “What one change (regulatory, tax, etc.) would make the greatest impact to the future success of your business/industry?” Table 5.2 shows the statewide total percentages of the most common responses to this survey question. Table 10.3 shows the east central total percentages of the same question.

TABLE 5.2 Statewide: Greatest Impact on Future Success

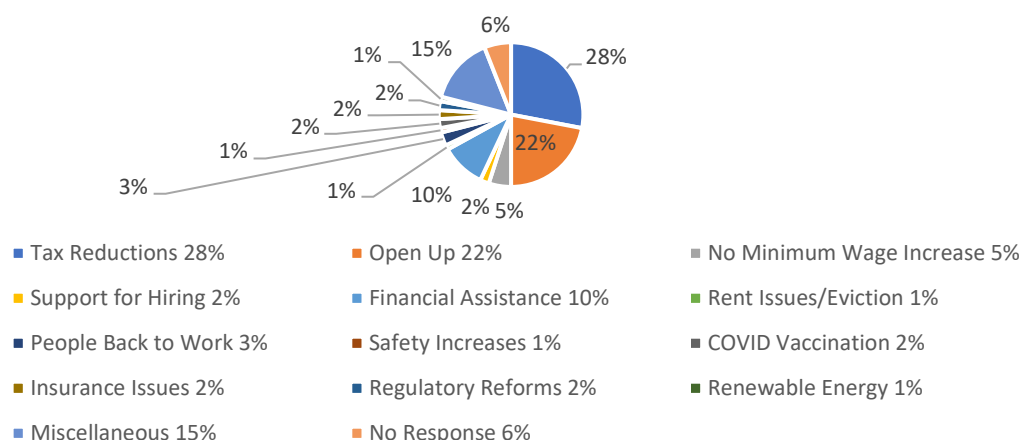
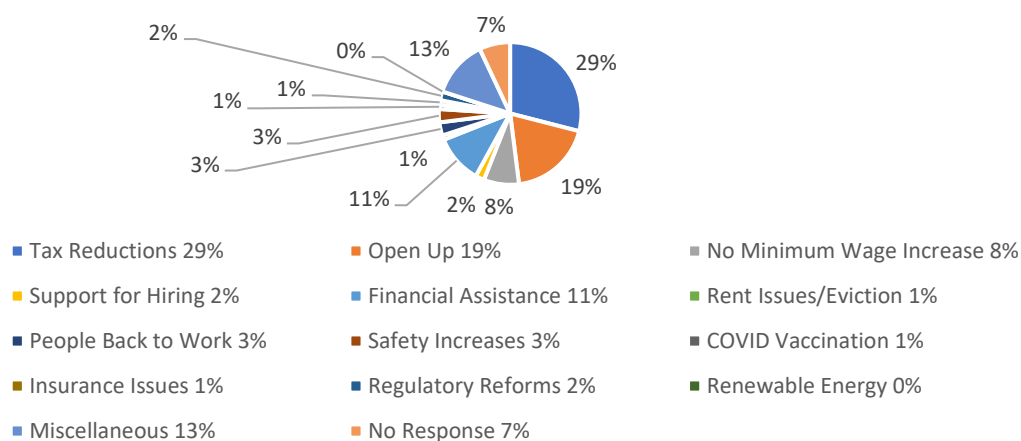


TABLE 10.3 East Central: Greatest Impact on Future Success



Both statewide and east central business owners shared the top three responses about what would have the greatest impact on their future success. These again were tax reductions, opening the Commonwealth for business and financial assistance. There was a slightly higher percentage of respondents in the east central who said the greatest impact would be the governor’s minimum wage increase proposal.

The fourth question of the survey asked, “What other suggestions do you have to kickstart the Commonwealth’s economic recovery?” Table 6.2 shows the statewide total percentages of the most common responses to this survey question. Table 10.4 shows the east central total percentages of the same question.

TABLE 6.2 Statewide: Kickstart the Economy

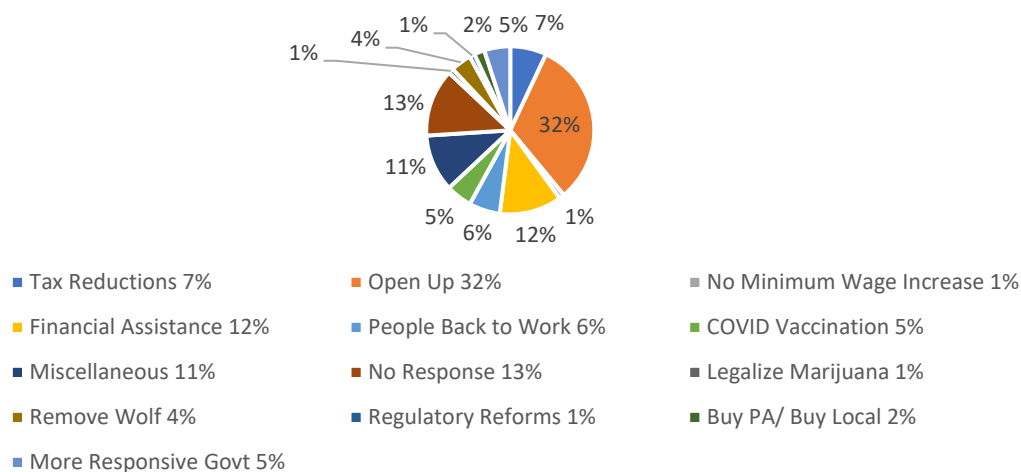
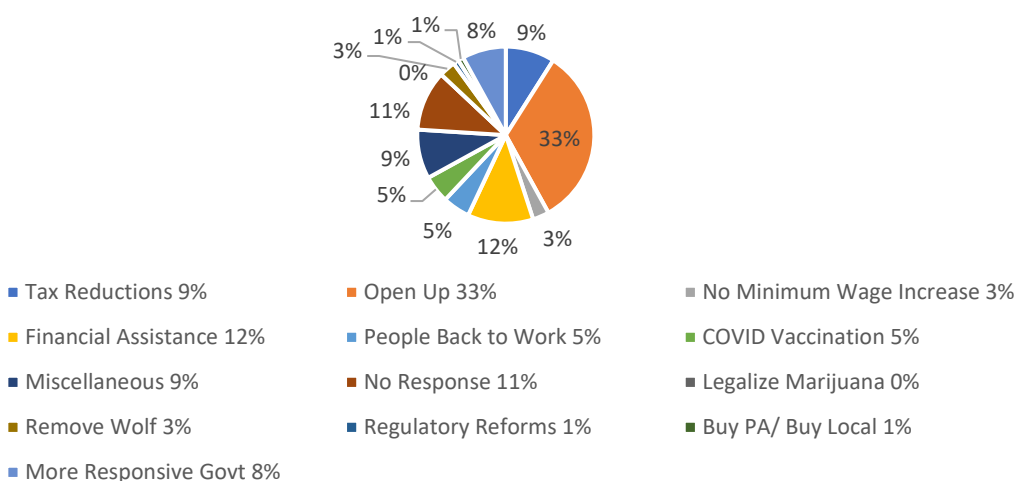


TABLE 10.4 East Central: Kickstart the Economy



While the top two responses (opening the Commonwealth for business and financial assistance) given by east central business owners and statewide business owners remain the same, there is a higher percentage of respondents in east central that are concerned about Governor Wolf’s minimum wage increase proposal. They indicated the best way to kickstart the economy was to not increase the minimum wage. 3% of east central respondents gave this response compared to 1% of statewide respondents.

South Central Region

The first question of the survey asked, “What do you want the state legislature to know about the challenges facing your business/industry?” Table 3.2 shows the statewide total percentages of the most common responses to this survey question. Table 11.1 shows the south central total percentages of the same question. The pattern of top challenges for statewide business owners is the same pattern for south central business owners.

TABLE 3.2 Statewide: Challenges Facing Your Business

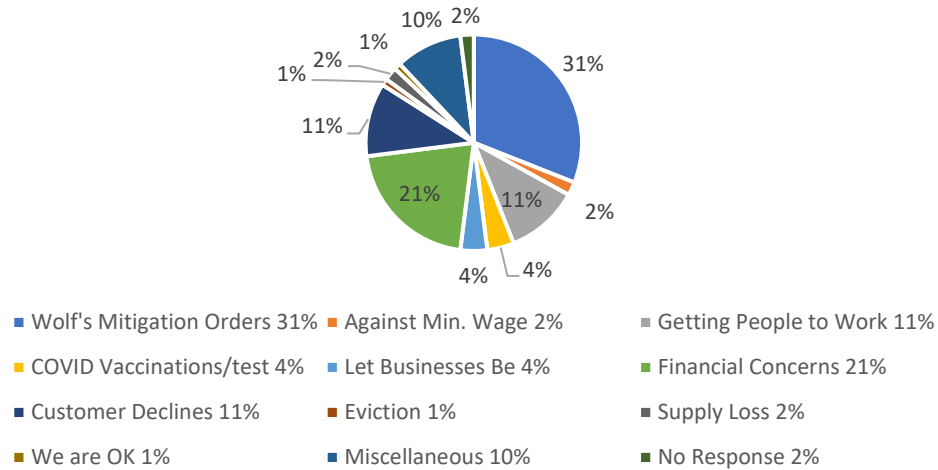
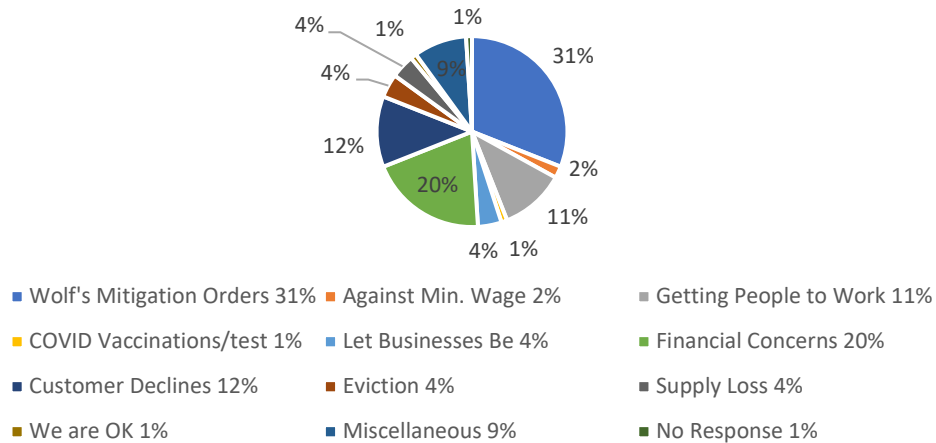


TABLE 11.1 South Central: Challenges Facing Your Business



The second question of the survey asked, “What type of assistance from the state is the most critical/would be the most beneficial for your business?” Table 4.2 shows the statewide total percentages of the most common responses to this survey question. Table 11.2 shows the south central total percentages of the same question.

TABLE 4.2 Statewide: Most Critical/Beneficial Assistance

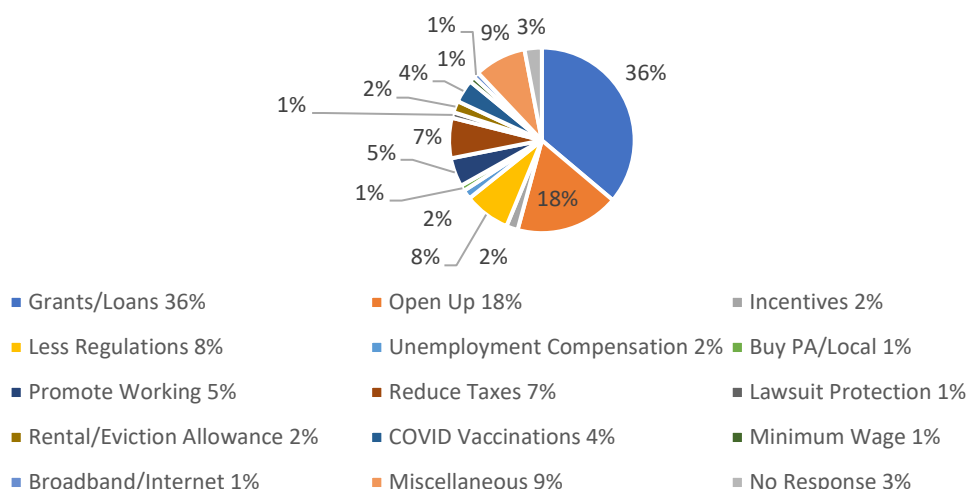
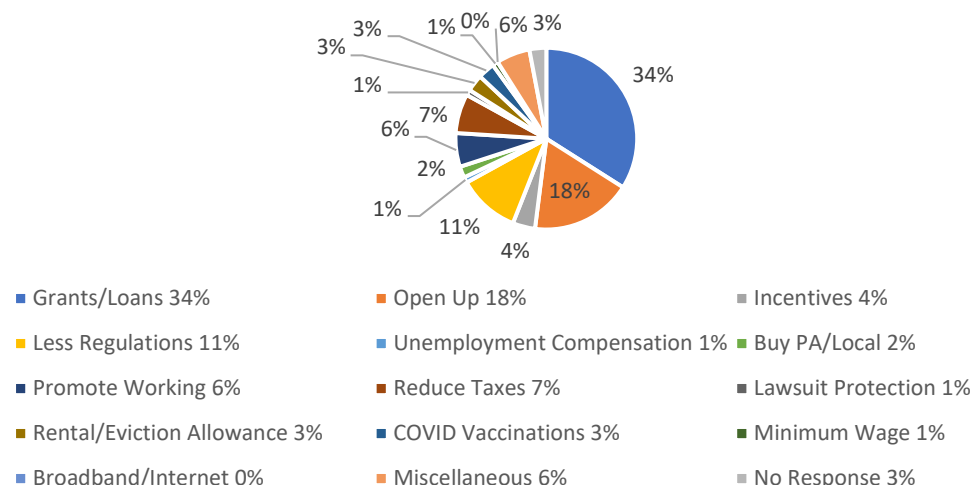


TABLE 11.2 South Central: Most Critical/Beneficial Assistance



In comparing responses from the statewide business owners and south central business owners, the top two most critical requests remain the same—they are financial assistance and for the Commonwealth to open for business. For this question, south central business owners are closely aligned with business owners across the Commonwealth. There is a higher percentage of respondents in the south central region who are interested in less regulations.

The third question of the survey asked, “What one change (regulatory, tax, etc.) would make the greatest impact to the future success of your business/industry?” Table 5.2 shows the statewide

total percentages of the most common responses to this survey question. Table 11.3 shows the south central total percentages of the same question.

TABLE 5.2 Statewide: Greatest Impact on Future Success

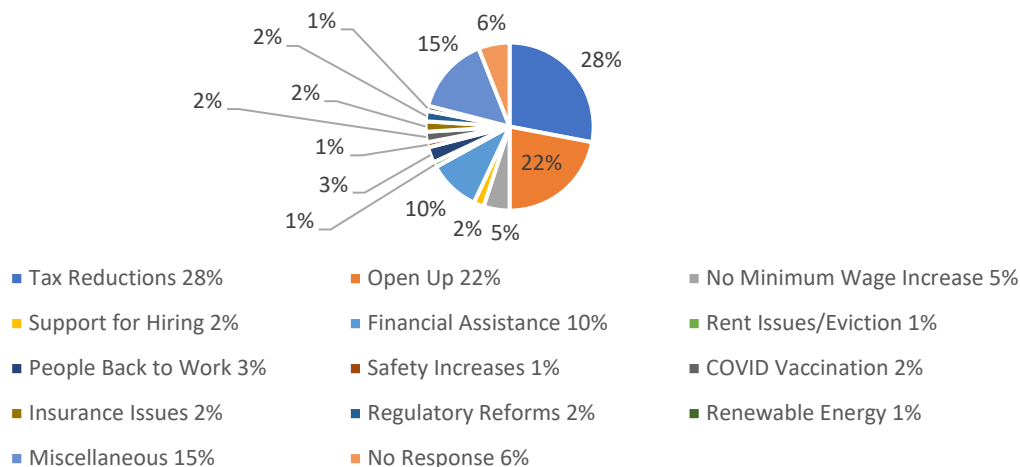
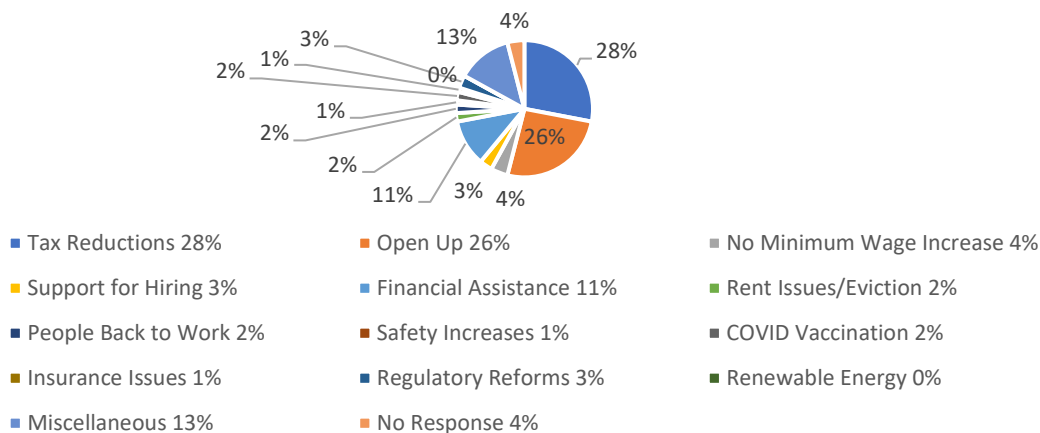


TABLE 11.3 South Central: Greatest Impact on Future Success



Like statewide respondents, business owners in the south central region of the state said tax reductions, the Commonwealth opening for business and financial assistance have the greatest impact on their future success. While still ranking second, a higher percentage of respondents in the south central region shared opening for business has the greatest impact.

The fourth question of the survey asked, “What other suggestions do you have to kickstart the Commonwealth’s economic recovery?” Table 6.2 shows the statewide total percentages of the most common responses to this survey question. Table 11.4 shows the south central total percentages of the same question.

TABLE 6.2 Statewide: Kickstart the Economy

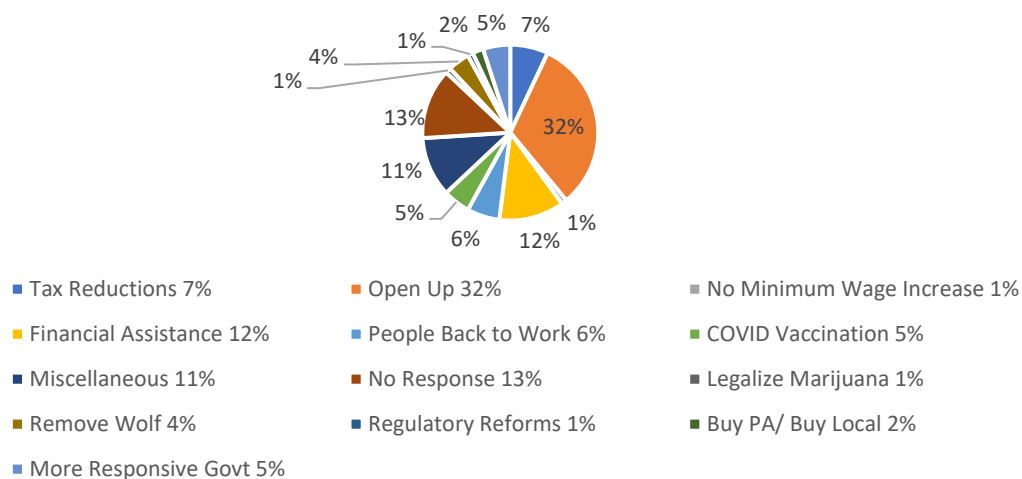
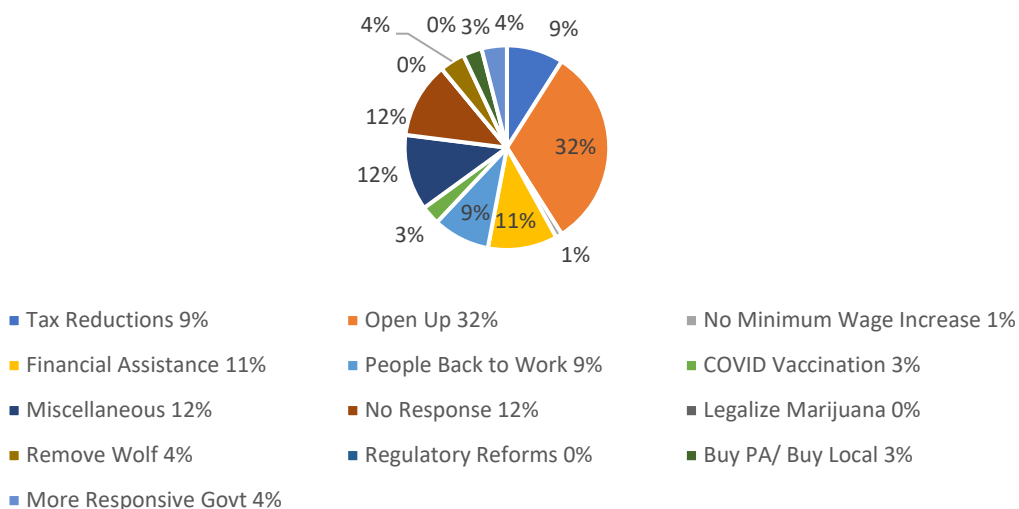


TABLE 11.4 South Central: Kickstart the Economy



Like most of the rest of the state, the south central respondents indicated opening the Commonwealth for business and financial assistance as the top two means to kickstart the economy. An equal number of respondents (9%) from the south central shared that tax reductions and getting people back to work were the best means to kickstart the economy.

Southeast Region

The first question of the survey asked, “What do you want the state legislature to know about the challenges facing your business/industry?” Table 3.2 shows the statewide total percentages of the most common responses to this survey question. Table 12.1 shows the southeast total percentages of the same question.

TABLE 3.2 Statewide: Challenges Facing Your Business

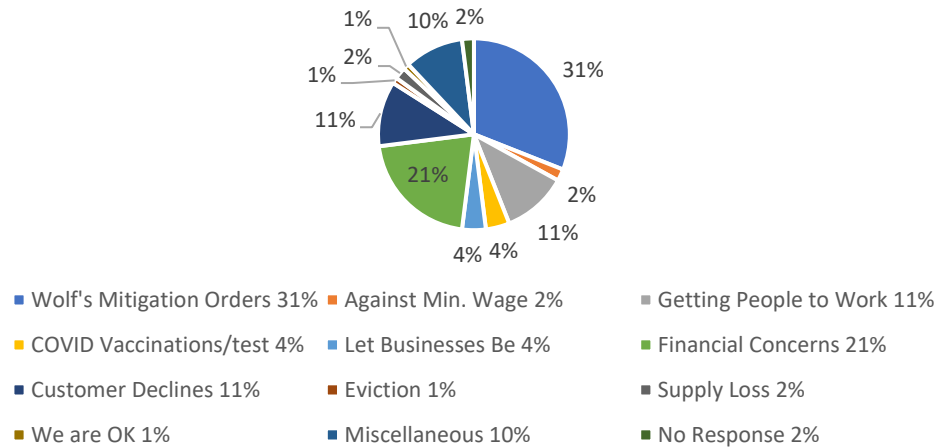
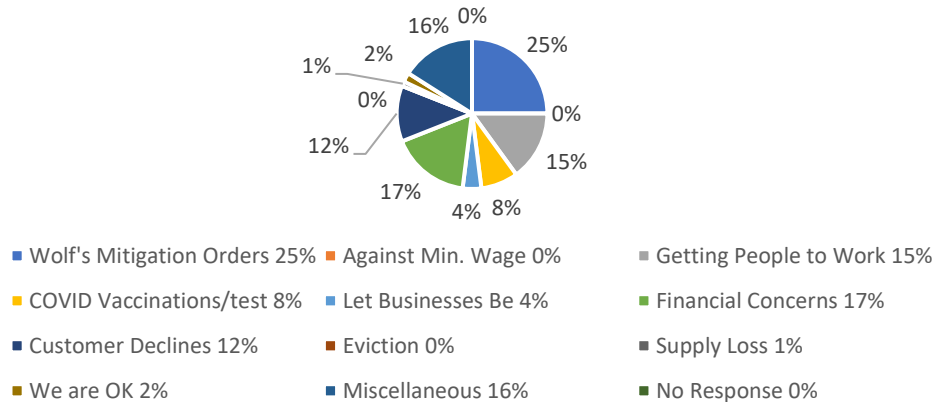


TABLE 12.1 Southeast: Challenges Facing Your Business



The pattern of top challenges for statewide business owners is the same pattern for southeast business owners. For the southeast, there were double the percentage (8%) of business owners who referenced the challenges of COVID-19 vaccinations in comparison to the statewide total percentages for COVID-19 vaccinations. In addition, there was a 6 percentage point difference in business owners who said the governor’s mitigation orders were their biggest challenge.

The second question of the survey asked, “What type of assistance from the state is the most critical/would be the most beneficial for your business?” Table 4.2 shows the statewide total percentages of the most common responses to this survey question. Table 12.2 shows the southeast total percentages of the same question.

TABLE 4.2 Statewide: Most Critical/Beneficial Assistance

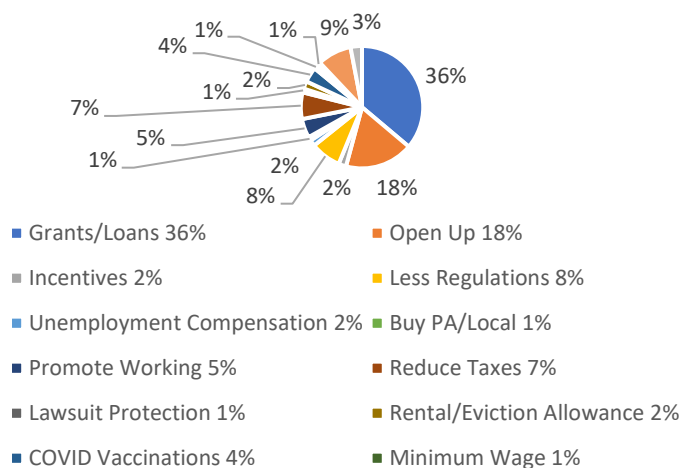
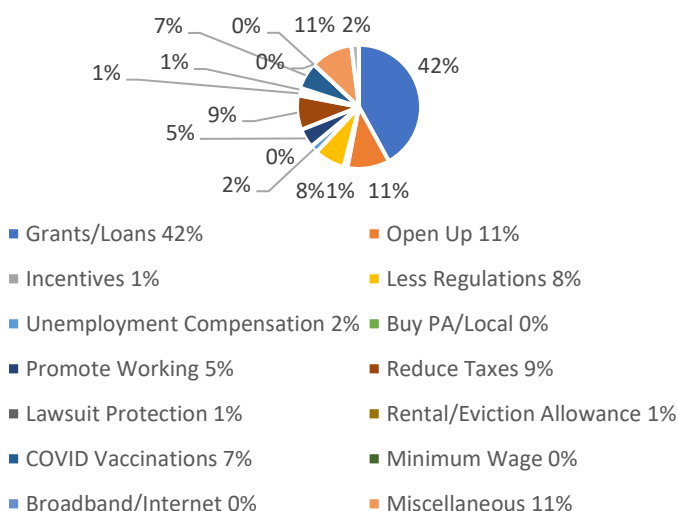


TABLE 12.2 Southeast: Most Critical/Beneficial Assistance



Compared to statewide businesses, businesses in the southeast had a 6 percentage point higher number of business owners who indicated financial assistance was a critical need. Likewise, there was a 7 percentage point difference in the number of businesses who shared the greatest need they had at this time was for the Commonwealth to be open for business. Southeast

business owners also had a higher percentage of respondents who indicated the call for the COVID-19 vaccination was their greatest need.

The third question of the survey asked, “What one change (regulatory, tax, etc.) would make the greatest impact to the future success of your business/industry?” Table 5.2 shows the statewide total percentages of the most common responses to this survey question. Table 12.3 shows the southeast total percentages of the same question.

TABLE 5.2 Statewide: Greatest Impact on Future Success

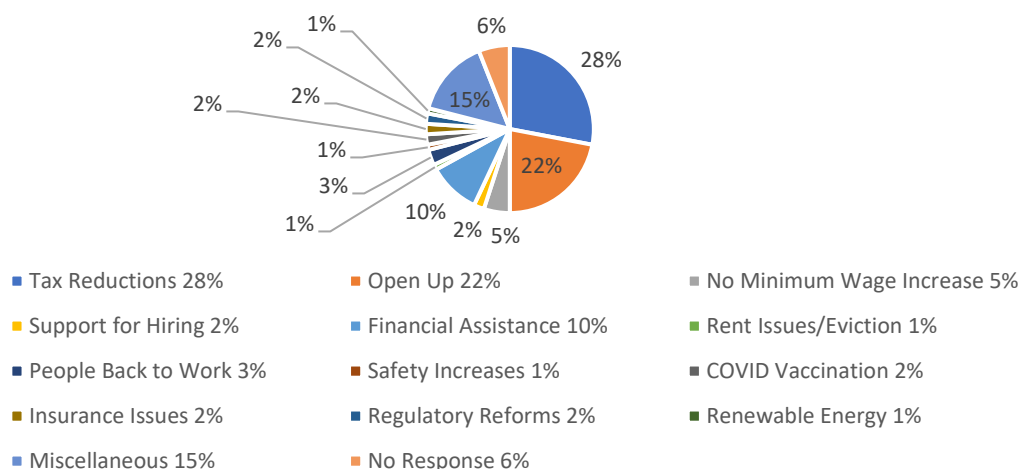
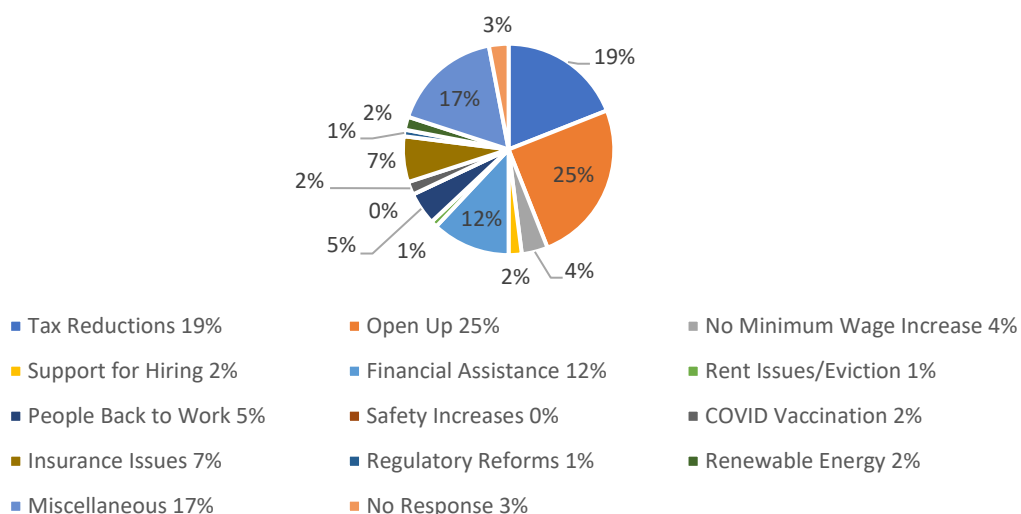


TABLE 12.3 Southeast: Greatest Impact on Future Success



Out of all the regions, the southeast was the region of respondents who broke away from having a different top response to this question. In the southeast, the majority (25%) of respondents indicated the action that would have the greatest impact on their future success was for the Commonwealth to be open for business. On a statewide basis, the majority (28%) of respondents

shared that tax reductions would have the greatest impact. Also, in the southeast, issues relating to insurance had a greater percentage (5%) of being named an issue with the greatest impact.

The fourth question of the survey asked, “What other suggestions do you have to kickstart the Commonwealth’s economic recovery?” Table 6.2 shows the statewide total percentages of the most common responses to this survey question. Table 12.4 shows the southeast total percentages of the same question.

TABLE 6.2 Statewide: Kickstart the Economy

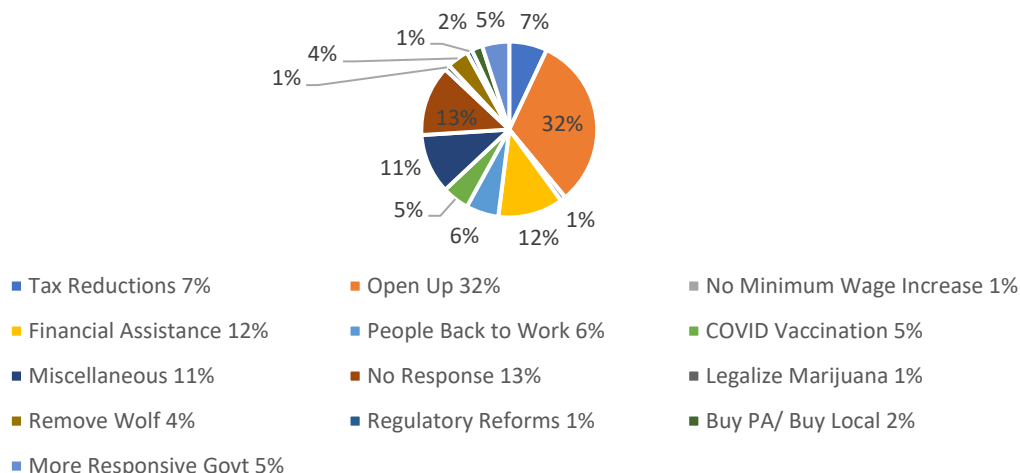
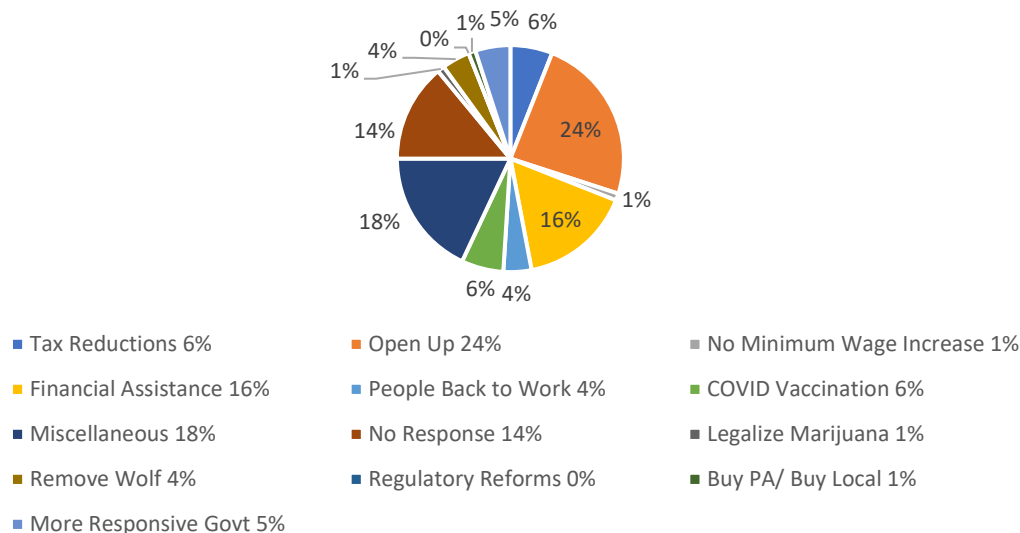


TABLE 12.4 Southeast: Kickstart the Economy



While comparing the statewide respondents to those of the southeast, the two top answers to how to best kickstart the economy are still opening the Commonwealth for business and financial assistance; however, a higher percentage of respondents favored financial assistance. Southeast respondents favored financial assistance by 16% while statewide respondents favored financial

assistance by 7%. There was also a slight reduction in the call to open the Commonwealth for business, as only 24% of southeast respondents gave this response compared to 32% of statewide respondents.

Summary

The Economic Recovery Business Survey provided business owners across the Commonwealth the opportunity to express their concerns and needs for the future success of their business operations to the House Republican Caucus. Every response has been read, compiled, and weighed in compiling this report.

Pennsylvania business owners have shared with us the challenges they are facing, the type of assistance that would be the most beneficial for their business, changes that would make the greatest impact to their future success and their suggestions on how to kickstart the economy.

The House Majority Policy Committee is submitting this report to our Republican colleagues for their information to form economic recovery policies that address the desires and needs expressed by Pennsylvania business owners.