

First Niagara/Siena College Research Institute
2011
865 Pennsylvania CEO's

Which of the following industry categories best describes the type of business your company is engaged in?																				
	Total	Region										Cluster Group								
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading						High	Middle	Low		
Engineering and Construction	14%	11%	11%	11%	5%	17%	29%	16%	15%	23%								12%	13%	21%
Food and Beverage	6%	4%	0%	4%	15%	7%	13%	10%	2%									5%	7%	3%
Financial	6%	5%	5%	10%	8%	4%	0%	3%	5%	5%								7%	5%	7%
Manufacturing	20%	21%	21%	18%	23%	15%	22%	23%	24%	19%								20%	22%	13%
Retail	18%	15%	25%	20%	18%	26%	12%	16%	22%	12%								19%	17%	19%
Service	23%	28%	26%	24%	23%	17%	20%	13%	16%	21%								23%	22%	23%
Wholesale and Distribution	13%	14%	12%	13%	8%	15%	12%	16%	8%	19%								14%	12%	13%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								0%	0%	0%

As you think about the current business or economic conditions in Pennsylvania as compared to six months ago, would you say they are considerably better, a little better, about the same, a little worse, or considerably worse?																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Considerably better	4%	4%	2%	4%	3%	4%	4%	1%	3%	2%	2%	4%	0%	5%	5%	5%	3%	10%	0%	0%
A little better	28%	28%	30%	28%	44%	31%	31%	28%	33%	19%	24%	24%	25%	30%	28%	28%	34%	63%	8%	0%
About the same	44%	45%	46%	44%	41%	41%	39%	36%	43%	49%	45%	53%	57%	44%	40%	42%	39%	26%	71%	13%
A little worse	18%	16%	18%	19%	10%	20%	22%	17%	19%	23%	21%	12%	15%	18%	19%	16%	19%	1%	19%	55%
Considerably worse	6%	6%	5%	6%	3%	4%	4%	17%	3%	7%	7%	6%	4%	3%	7%	9%	5%	0%	2%	32%

Looking forward from today through next year, that is, the entire 2012 year, how would you describe your expectations for the economy in Pennsylvania?																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Considerably better	4%	4%	2%	6%	5%	2%	0%	0%	1%	2%	2%	2%	2%	4%	6%	4%	3%	9%	0%	1%
A little better	38%	38%	35%	37%	54%	44%	41%	36%	37%	28%	33%	37%	47%	35%	37%	43%	37%	75%	19%	1%
About the same	39%	42%	46%	33%	26%	39%	41%	32%	44%	40%	37%	45%	34%	46%	33%	36%	40%	16%	67%	17%
A little worse	16%	13%	16%	20%	13%	13%	16%	20%	16%	23%	21%	8%	17%	12%	21%	14%	18%	1%	14%	60%
Considerably worse	4%	3%	2%	4%	3%	2%	2%	12%	1%	7%	7%	8%	0%	3%	3%	4%	3%	1%	0%	21%

Now thinking specifically about your industry, how would you describe the current business or economic conditions in Pennsylvania as compared with six months ago?																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Considerably better	5%	5%	4%	2%	3%	6%	6%	4%	5%	2%	5%	2%	2%	3%	7%	5%	5%	12%	0%	0%
A little better	27%	25%	28%	28%	33%	26%	20%	26%	38%	21%	22%	31%	26%	28%	29%	26%	28%	61%	7%	0%
About the same	38%	41%	42%	38%	46%	46%	33%	36%	30%	33%	34%	39%	40%	44%	33%	38%	38%	27%	61%	2%
A little worse	24%	21%	21%	25%	18%	17%	35%	20%	27%	37%	28%	27%	28%	21%	23%	23%	23%	0%	31%	61%
Considerably worse	6%	8%	5%	6%	0%	6%	6%	13%	0%	7%	11%	2%	4%	4%	7%	8%	5%	0%	1%	37%

And looking forward from today through the next year, how would you describe your expectations for your industry here in Pennsylvania?																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Considerably better	5%	5%	2%	6%	8%	6%	0%	6%	3%	2%	5%	6%	2%	4%	6%	5%	3%	12%	0%	0%
A little better	34%	31%	37%	33%	44%	41%	29%	30%	39%	35%	27%	41%	40%	33%	37%	35%	31%	68%	16%	1%
About the same	41%	44%	46%	39%	38%	35%	43%	38%	47%	33%	39%	41%	28%	47%	35%	41%	46%	21%	69%	13%
A little worse	16%	15%	12%	17%	10%	13%	29%	13%	11%	26%	21%	10%	28%	13%	15%	14%	17%	0%	14%	59%
Considerably worse	5%	5%	4%	6%	0%	6%	0%	13%	0%	5%	7%	2%	2%	3%	6%	6%	3%	0%	1%	27%

Now thinking specifically about your company, what are your expectations for revenue through the year 2012? Do you believe your revenue will??																				
	Region										Industry							Cluster Group		
	Total	Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Grow substantially	6%	9%	5%	6%	5%	4%	2%	6%	3%	5%	2%	6%	11%	5%	6%	7%	5%	11%	3%	1%
Grow moderately	40%	37%	30%	42%	59%	44%	39%	39%	44%	28%	30%	59%	40%	41%	44%	36%	40%	64%	30%	8%
Stay about the same	35%	35%	44%	32%	26%	24%	39%	30%	44%	47%	42%	27%	30%	38%	32%	34%	36%	24%	49%	22%
Decrease moderately	16%	15%	21%	18%	10%	24%	20%	13%	8%	21%	20%	8%	15%	14%	14%	17%	18%	1%	16%	52%
Decrease substantially	4%	4%	0%	3%	0%	4%	0%	12%	1%	0%	6%	0%	4%	2%	3%	7%	1%	0%	2%	16%
Refused	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Again as you consider your company and your existing customer base, do you expect to realize additional revenue from your existing customers, about the same revenue from your existing customers as you currently realize or less revenue from your existing customers than you currently do?																				
	Region										Industry							Cluster Group		
	Total	Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Additional revenue	24%	23%	25%	24%	28%	33%	29%	19%	24%	12%	19%	33%	25%	27%	29%	17%	24%	43%	14%	3%
About the same revenue	54%	53%	53%	53%	62%	43%	51%	58%	63%	60%	50%	57%	60%	55%	53%	55%	52%	53%	64%	29%
Less revenue	22%	24%	23%	23%	10%	24%	20%	23%	13%	28%	31%	10%	15%	18%	19%	28%	23%	4%	22%	68%
Refused	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Continuing to focus on your company, please think quickly about profitability. Between today and the end of the calendar year 2012 do you expect your profits to grow substantially, grow moderately, stay about the same, decrease moderately or decrease substantially?																				
	Region										Industry							Cluster Group		
	Total	Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Grow substantially	4%	6%	7%	4%	3%	4%	2%	4%	0%	0%	3%	4%	11%	3%	4%	5%	2%	9%	1%	1%
Grow moderately	32%	30%	23%	32%	44%	24%	37%	29%	39%	28%	22%	37%	38%	34%	37%	28%	33%	51%	23%	9%
Stay about the same	39%	38%	47%	37%	33%	46%	33%	39%	41%	40%	44%	49%	26%	39%	35%	41%	35%	38%	47%	17%
Decrease moderately	22%	23%	23%	24%	18%	20%	24%	20%	20%	28%	28%	8%	25%	21%	22%	20%	28%	2%	27%	57%
Decrease substantially	3%	3%	0%	2%	0%	6%	4%	7%	0%	5%	2%	2%	0%	2%	7%	3%	0%	0%	2%	15%
Refused	0%	0%	0%	1%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%

Businesses and the executives that direct them strive to enhance profitability in many ways. Through which of the following strategies do you plan to MOST enhance your firm's profitability over the next year?																				
	Region										Industry							Cluster Group		
	Total	Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Market/Demand growth	44%	45%	33%	45%	44%	43%	51%	42%	42%	35%	37%	45%	60%	41%	49%	42%	45%	60%	37%	26%
Cost reduction	30%	29%	35%	30%	23%	35%	29%	33%	30%	40%	36%	20%	21%	29%	31%	30%	34%	19%	33%	50%
Price increase	12%	12%	18%	14%	13%	13%	8%	10%	9%	12%	9%	20%	8%	14%	7%	13%	16%	11%	14%	10%
New technology	8%	11%	7%	6%	10%	6%	10%	6%	9%	12%	8%	8%	8%	12%	5%	9%	4%	8%	9%	4%
Other	4%	2%	4%	4%	10%	2%	2%	7%	5%	2%	8%	4%	2%	2%	4%	3%	1%	1%	4%	8%
No Response	2%	2%	4%	1%	0%	2%	0%	1%	5%	0%	2%	2%	2%	1%	3%	3%	0%	1%	2%	1%

Please indicate which of the following are major areas of concentration for your firm now and through 2012.																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Expansion of existing markets	55%	56%	44%	54%	49%	52%	49%	54%	65%	58%	58%	53%	70%	55%	44%	55%	61%	62%	53%	44%
Growth in existing products	48%	48%	40%	44%	46%	57%	47%	52%	47%	37%	40%	49%	45%	60%	48%	43%	48%	56%	46%	34%
Entry into new markets	36%	34%	26%	35%	38%	31%	47%	46%	32%	40%	33%	29%	26%	51%	28%	34%	40%	40%	33%	34%
New product lines	29%	30%	32%	28%	36%	24%	24%	29%	32%	26%	16%	45%	32%	36%	33%	20%	32%	28%	31%	24%
Internal restructuring	26%	25%	30%	26%	26%	31%	22%	28%	25%	21%	27%	29%	21%	22%	28%	29%	23%	20%	25%	42%
Technology innovation	23%	23%	16%	22%	38%	30%	24%	23%	19%	26%	17%	27%	21%	32%	16%	27%	17%	24%	24%	15%
Acquisition of new businesses	10%	10%	11%	13%	15%	9%	6%	9%	10%	5%	3%	10%	13%	12%	10%	11%	11%	11%	11%	7%
Construction of new locations	8%	9%	9%	8%	15%	4%	2%	7%	8%	12%	11%	10%	2%	6%	15%	4%	8%	7%	9%	6%
Other	3%	3%	9%	3%	3%	4%	6%	4%	3%	7%	4%	2%	2%	2%	7%	4%	2%	3%	2%	9%
No response	4%	3%	7%	4%	13%	7%	2%	6%	3%	5%	5%	2%	2%	3%	6%	5%	2%	4%	4%	4%

Please indicate which of the following is the MAIN area of concentration for your company now and through 2012.																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Expansion of existing markets	30%	31%	26%	29%	18%	26%	31%	28%	38%	35%	37%	29%	40%	22%	26%	35%	30%	34%	30%	25%
Growth in existing products	24%	24%	18%	24%	31%	35%	12%	20%	23%	21%	18%	24%	23%	30%	26%	19%	27%	29%	23%	14%
Entry into new markets	14%	13%	7%	13%	10%	15%	20%	16%	10%	16%	11%	8%	8%	23%	8%	15%	14%	14%	14%	15%
Internal restructuring	10%	10%	16%	11%	8%	9%	12%	13%	8%	2%	15%	14%	8%	4%	12%	9%	9%	5%	9%	24%
New product lines	8%	6%	7%	9%	10%	6%	10%	9%	9%	12%	4%	14%	9%	7%	10%	5%	12%	5%	11%	7%
Technology innovation	4%	5%	4%	4%	3%	4%	4%	3%	3%	0%	2%	2%	2%	6%	2%	6%	2%	5%	4%	1%
Acquisition of new businesses	2%	2%	4%	3%	3%	0%	2%	3%	1%	5%	1%	2%	8%	2%	1%	3%	3%	2%	2%	3%
Construction of new locations	2%	2%	2%	2%	3%	0%	0%	1%	4%	2%	5%	2%	2%	2%	2%	2%	0%	1%	3%	3%
Other	2%	3%	7%	1%	0%	0%	4%	1%	1%	2%	2%	0%	0%	1%	4%	3%	0%	2%	1%	3%
No response	5%	4%	11%	5%	15%	6%	4%	6%	4%	5%	5%	4%	2%	3%	8%	5%	3%	4%	5%	5%

Do you intend to invest between today through 2012 in any fixed assets for your firm designed to meet growing demand, reduce costs or enhance productivity?																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Yes	46%	43%	40%	51%	67%	43%	41%	46%	39%	51%	40%	55%	34%	57%	40%	44%	47%	58%	41%	29%
No	44%	47%	46%	40%	23%	43%	47%	46%	47%	44%	54%	31%	60%	34%	47%	41%	50%	32%	48%	64%
Not sure	10%	10%	14%	9%	10%	15%	12%	7%	14%	5%	7%	14%	6%	9%	13%	15%	3%	11%	11%	6%

What is the main way you expect to finance those assets?																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Internally generated funds	54%	54%	39%	63%	69%	35%	50%	50%	39%	59%	54%	67%	83%	52%	48%	50%	57%	60%	46%	57%
Borrow from a financial institution	31%	34%	48%	24%	23%	52%	35%	31%	42%	18%	33%	26%	0%	36%	34%	30%	31%	28%	36%	26%
Private equity	6%	4%	4%	6%	4%	4%	5%	9%	6%	14%	2%	4%	11%	5%	10%	7%	7%	5%	8%	10%
Not sure	8%	8%	9%	7%	4%	9%	10%	9%	13%	9%	10%	4%	6%	7%	8%	13%	4%	7%	10%	7%

Now thinking about the people that work for your company, do you intend to substantially increase, moderately increase, remain about the same or decrease your workforce between today and the end of 2012?																				
	Total	Region									Industry						Cluster Group			
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Substantially increase	2%	2%	0%	2%	0%	0%	0%	1%	4%	2%	0%	2%	2%	1%	3%	1%	3%	2%	0%	
Moderately increase	28%	30%	39%	31%	26%	24%	31%	19%	22%	23%	26%	24%	38%	33%	24%	27%	22%	41%	23%	8%
Remain about the same	61%	59%	51%	58%	69%	70%	63%	68%	66%	56%	58%	69%	49%	57%	65%	59%	70%	53%	67%	62%
Decrease	9%	9%	11%	10%	5%	6%	6%	12%	6%	19%	15%	4%	11%	8%	8%	10%	7%	3%	8%	29%
Refused	0%	1%	0%	0%	0%	0%	0%	0%	3%	0%	1%	0%	0%	1%	1%	0%	0%	1%	1%	0%

Now thinking about other challenges that your company faces, which of the following are you concerned with.																				
	Total	Region									Industry						Cluster Group			
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Health care costs	69%	67%	72%	67%	62%	69%	67%	78%	68%	77%	70%	73%	58%	79%	67%	62%	71%	64%	70%	80%
Governmental regulation	62%	60%	65%	59%	64%	61%	65%	68%	59%	72%	65%	63%	72%	61%	59%	57%	63%	51%	65%	78%
Adverse economic conditions	60%	61%	63%	59%	62%	70%	59%	68%	54%	51%	62%	51%	72%	65%	62%	54%	58%	52%	63%	71%
Taxation	52%	48%	46%	53%	41%	50%	47%	65%	48%	65%	50%	51%	57%	59%	55%	40%	55%	46%	52%	62%
Rising supplier costs	45%	43%	49%	46%	46%	43%	45%	52%	43%	44%	48%	61%	8%	60%	51%	32%	44%	42%	48%	45%
Energy costs	41%	40%	42%	34%	38%	37%	53%	59%	34%	53%	40%	47%	19%	51%	45%	33%	42%	37%	42%	46%
Cash flow	35%	37%	40%	36%	36%	41%	22%	38%	28%	37%	40%	39%	30%	39%	33%	35%	30%	29%	36%	47%
Existing U.S. competition	32%	31%	28%	31%	26%	30%	18%	39%	33%	35%	34%	41%	25%	36%	36%	21%	35%	33%	32%	26%
Global political instability	26%	25%	16%	29%	41%	13%	22%	29%	24%	28%	18%	24%	30%	34%	27%	19%	28%	26%	26%	22%
Risk management	22%	26%	23%	18%	21%	22%	20%	25%	28%	7%	30%	24%	30%	20%	18%	22%	18%	22%	23%	19%
Human resources	19%	16%	26%	23%	23%	19%	14%	20%	18%	12%	17%	24%	15%	24%	19%	20%	9%	19%	21%	12%
Ability to obtain suitable financing	18%	24%	21%	14%	13%	17%	16%	19%	14%	14%	21%	24%	9%	14%	19%	19%	15%	15%	19%	22%
Availability of equity financing	14%	17%	14%	12%	5%	11%	12%	22%	6%	7%	16%	31%	13%	10%	17%	13%	5%	12%	14%	17%
Foreign competition	13%	13%	11%	12%	26%	17%	6%	16%	15%	14%	9%	6%	0%	28%	14%	6%	13%	14%	13%	9%
Other	2%	1%	0%	2%	0%	4%	0%	4%	1%	2%	3%	0%	0%	1%	1%	2%	3%	1%	2%	3%
Refused	2%	2%	0%	3%	5%	4%	2%	0%	4%	2%	0%	6%	6%	1%	1%	5%	2%	3%	2%	2%

Which of the challenges you selected are you MOST concerned with?																				
	Total	Region									Industry						Cluster Group			
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Governmental regulation	22%	19%	26%	22%	26%	28%	22%	20%	29%	23%	23%	8%	49%	22%	17%	23%	17%	17%	23%	29%
Adverse economic conditions	22%	22%	23%	20%	15%	28%	31%	17%	14%	21%	29%	10%	15%	19%	28%	18%	23%	21%	21%	24%
Health care costs	12%	15%	14%	9%	3%	9%	8%	14%	15%	21%	8%	20%	4%	15%	11%	14%	14%	13%	14%	7%
Existing U.S. competition	10%	7%	4%	12%	10%	7%	4%	14%	13%	9%	10%	16%	9%	10%	10%	9%	7%	14%	8%	3%
Taxation	6%	6%	5%	7%	8%	6%	6%	10%	1%	2%	3%	6%	6%	5%	10%	5%	6%	6%	6%	6%
Cash flow	5%	5%	5%	6%	5%	6%	4%	4%	5%	5%	3%	4%	4%	5%	3%	6%	11%	4%	5%	8%
Rising supplier costs	4%	4%	5%	4%	3%	2%	4%	3%	5%	2%	7%	10%	0%	3%	8%	2%	3%	5%	5%	3%
Energy costs	3%	3%	5%	3%	8%	6%	6%	6%	3%	2%	2%	4%	0%	2%	3%	5%	7%	3%	3%	6%
Global political instability	3%	2%	0%	5%	5%	0%	2%	4%	0%	7%	1%	4%	4%	3%	4%	4%	3%	4%	3%	1%
Ability to obtain suitable financing	3%	4%	5%	2%	3%	2%	2%	0%	3%	0%	3%	4%	0%	4%	1%	3%	2%	2%	3%	2%
Foreign competition	2%	3%	4%	2%	5%	2%	0%	1%	1%	2%	2%	0%	0%	5%	3%	0%	3%	3%	2%	3%
Human resources	2%	1%	2%	3%	3%	0%	2%	0%	4%	0%	2%	2%	2%	2%	0%	4%	0%	2%	2%	0%
Risk management	1%	2%	0%	1%	3%	2%	2%	1%	3%	0%	2%	2%	4%	0%	2%	2%	1%	1%	2%	1%
Availability of equity financing	1%	2%	2%	0%	0%	0%	4%	1%	0%	0%	2%	4%	0%	1%	2%	2%	1%	1%	1%	1%
Other	1%	1%	0%	1%	0%	2%	0%	1%	1%	0%	2%	0%	0%	1%	1%	2%	0%	1%	1%	2%
Refused	2%	2%	0%	3%	5%	2%	2%	0%	4%	5%	2%	4%	4%	2%	0%	5%	2%	3%	2%	1%

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Given the current market, how likely do you think it is that a new company could begin operations in your area and be successful in your industry in the near term?																				
	Region										Industry							Cluster Group		
	Total	Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Very likely	5%	7%	4%	4%	3%	2%	2%	4%	4%	2%	2%	8%	4%	2%	10%	6%	1%	6%	4%	3%
Somewhat likely	18%	18%	25%	22%	21%	19%	10%	17%	23%	9%	18%	14%	19%	16%	22%	23%	11%	24%	17%	8%
Not very likely	48%	45%	47%	50%	51%	57%	47%	42%	51%	53%	51%	61%	57%	44%	42%	44%	57%	52%	50%	35%
Not at all likely	29%	31%	25%	24%	23%	22%	41%	36%	23%	35%	29%	16%	17%	38%	26%	27%	31%	18%	29%	55%
Refused	0%	0%	0%	1%	3%	0%	0%	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	1%	0%	0%

Thinking specifically about Pennsylvania and the relationship between the state government and businesses like yours, overall would you say the government of the Commonwealth of Pennsylvania is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?

	Region										Industry							Cluster Group		
	Total	Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Excellent	1%	1%	2%	1%	5%	0%	0%	1%	0%	0%	1%	2%	0%	1%	3%	0%	0%	1%	1%	1%
Good	14%	16%	11%	13%	23%	22%	12%	7%	9%	12%	12%	22%	23%	13%	16%	13%	7%	19%	12%	4%
Fair	44%	48%	56%	43%	33%	46%	35%	33%	46%	40%	38%	47%	38%	48%	44%	44%	45%	51%	42%	31%
Poor	36%	28%	32%	41%	36%	24%	47%	57%	33%	47%	45%	22%	35%	33%	30%	40%	41%	24%	38%	61%
Don't know	5%	7%	0%	2%	3%	7%	6%	1%	13%	2%	4%	6%	4%	5%	8%	4%	7%	5%	7%	3%

Of the following, what would you like to see the Governor and Legislature of Pennsylvania focus on?

	Region										Industry							Cluster Group		
	Total	Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Spending Cuts	61%	55%	70%	63%	67%	63%	57%	61%	71%	70%	57%	63%	65%	68%	65%	49%	63%	56%	63%	65%
Income Tax Reform	48%	50%	61%	49%	54%	41%	45%	51%	42%	51%	51%	43%	50%	55%	45%	43%	51%	47%	47%	57%
Business Development Incentives	46%	49%	44%	41%	56%	37%	37%	57%	46%	47%	49%	53%	37%	50%	42%	47%	39%	50%	43%	44%
Infrastructure Development	40%	43%	42%	39%	49%	39%	27%	49%	44%	30%	45%	35%	42%	42%	31%	45%	38%	48%	35%	34%
Ethics Reform	28%	27%	28%	33%	33%	26%	31%	32%	24%	12%	30%	27%	35%	28%	28%	25%	31%	28%	26%	36%
Increasing State Revenues through consumer oriented taxes	11%	9%	11%	15%	15%	13%	6%	12%	6%	9%	10%	12%	13%	12%	10%	12%	9%	14%	9%	9%
(Vol) Reducing regulations	2%	1%	2%	1%	0%	4%	0%	0%	3%	9%	2%	0%	0%	2%	1%	2%	3%	1%	2%	3%
Other	12%	10%	7%	12%	8%	19%	16%	16%	13%	16%	11%	4%	15%	13%	12%	13%	16%	11%	10%	21%
Refused	3%	3%	2%	3%	3%	0%	2%	1%	4%	0%	1%	10%	0%	1%	5%	3%	1%	2%	4%	1%

Of those, which SINGLE area would you most like to see the Governor and Legislature focus on?

	Region										Industry							Cluster Group		
	Total	Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Spending Cuts	32%	28%	39%	31%	38%	29%	35%	30%	46%	38%	26%	35%	31%	39%	32%	25%	36%	28%	35%	34%
Business Development Incentives	20%	23%	11%	15%	26%	21%	14%	28%	18%	21%	17%	24%	8%	25%	21%	20%	19%	22%	19%	19%
Income Tax Reform	17%	17%	28%	18%	15%	17%	20%	19%	13%	14%	22%	16%	23%	15%	17%	18%	13%	19%	17%	15%
Infrastructure Development	14%	17%	11%	16%	13%	13%	12%	7%	9%	14%	23%	6%	19%	9%	9%	17%	17%	16%	14%	10%
Ethics Reform	5%	5%	5%	6%	0%	4%	4%	6%	1%	2%	3%	4%	8%	2%	5%	7%	6%	5%	4%	5%
Increasing State Revenues through consumer oriented taxes	2%	0%	2%	4%	3%	6%	0%	1%	0%	0%	1%	0%	2%	2%	1%	4%	0%	2%	1%	2%
Other	6%	5%	4%	6%	3%	6%	12%	6%	5%	10%	6%	4%	8%	5%	8%	5%	7%	5%	5%	12%
Refused	4%	4%	2%	4%	3%	4%	2%	3%	8%	0%	2%	10%	2%	3%	6%	5%	2%	4%	4%	3%

How confident are you in the ability of the government of the Commonwealth of Pennsylvania to improve the business climate for businesses like yours here in Pennsylvania over the next year? Are you																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Very confident	3%	3%	0%	3%	5%	6%	0%	3%	1%	5%	3%	4%	4%	1%	5%	3%	2%	5%	2%	0%
Somewhat confident	29%	32%	30%	25%	26%	22%	31%	23%	42%	23%	29%	33%	25%	31%	32%	27%	26%	40%	24%	16%
Not very confident	50%	49%	51%	52%	49%	57%	49%	46%	48%	47%	49%	51%	60%	53%	44%	52%	48%	44%	55%	49%
Not at all confident	17%	16%	18%	18%	15%	13%	20%	28%	8%	26%	18%	12%	12%	14%	17%	18%	22%	9%	17%	35%
Refused	1%	1%	2%	2%	5%	2%	0%	0%	1%	0%	1%	0%	0%	0%	3%	1%	3%	1%	2%	0%

And thinking about the efforts of the federal government, overall would you say the federal government is doing an excellent, good, fair or poor job of creating a business climate in which companies like yours will succeed?																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Excellent	1%	2%	0%	1%	0%	2%	0%	0%	0%	0%	1%	0%	0%	0%	1%	3%	0%	2%	1%	0%
Good	5%	5%	5%	6%	10%	4%	4%	4%	4%	0%	3%	4%	2%	2%	6%	8%	3%	8%	3%	0%
Fair	20%	20%	16%	21%	33%	22%	14%	16%	19%	19%	17%	33%	17%	19%	21%	20%	15%	29%	18%	3%
Poor	72%	69%	79%	71%	51%	70%	78%	78%	75%	81%	76%	61%	79%	77%	67%	67%	79%	60%	75%	94%
Don't know	2%	3%	0%	2%	5%	2%	4%	1%	3%	0%	2%	2%	2%	2%	5%	2%	3%	1%	3%	3%

How confident are you in the ability of the federal government to improve the business climate for businesses like yours here in Pennsylvania over the next year? Are you																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Very confident	1%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	1%	2%	1%	0%	
Somewhat confident	12%	14%	14%	10%	8%	13%	10%	12%	16%	5%	10%	14%	12%	8%	20%	14%	6%	21%	8%	1%
Not very confident	39%	35%	35%	43%	49%	41%	41%	33%	42%	35%	36%	47%	29%	39%	34%	42%	43%	42%	40%	27%
Not at all confident	47%	48%	49%	44%	41%	44%	49%	55%	41%	58%	52%	39%	60%	53%	43%	39%	50%	34%	49%	71%
Refused	1%	1%	2%	2%	3%	2%	0%	0%	1%	2%	2%	0%	0%	0%	3%	1%	1%	1%	2%	1%

For each of the following national proposals indicate whether you support it or oppose it? - Repeal the Health Care Reform Legislation																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Support	67%	65%	72%	67%	62%	63%	67%	64%	68%	81%	68%	65%	67%	71%	57%	67%	71%	57%	69%	85%
Oppose	21%	24%	16%	21%	23%	19%	29%	23%	18%	7%	22%	16%	23%	19%	22%	26%	17%	30%	19%	9%
No opinion	12%	11%	12%	12%	15%	19%	4%	13%	14%	12%	11%	18%	10%	10%	21%	7%	12%	14%	13%	6%

For each of the following national proposals indicate whether you support it or oppose it? - Pass a Balanced Budget Constitutional Amendment																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Support	78%	75%	79%	79%	59%	74%	84%	80%	80%	84%	81%	86%	75%	80%	79%	72%	78%	73%	81%	85%
Oppose	13%	15%	12%	14%	28%	17%	10%	12%	8%	9%	11%	10%	17%	10%	20%	12%	12%	18%	11%	9%
No opinion	9%	10%	9%	7%	13%	9%	6%	9%	13%	7%	8%	4%	8%	9%	11%	8%	10%	10%	9%	6%

For each of the following national proposals indicate whether you support it or oppose it? - Increase Federal Spending on Infrastructure																				
	Total	Region										Industry						Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Support	45%	47%	37%	46%	54%	56%	43%	55%	32%	30%	51%	47%	40%	41%	37%	54%	42%	52%	43%	36%
Oppose	38%	40%	46%	37%	41%	30%	39%	29%	47%	53%	32%	41%	37%	44%	42%	31%	44%	31%	40%	50%
No opinion	17%	13%	18%	18%	5%	15%	18%	16%	22%	16%	18%	12%	23%	15%	21%	15%	14%	17%	17%	13%

For each of the following national proposals indicate whether you support it or oppose it? - Reduce the Corporate Income Tax Rates																				
	Total	Region									Industry						Cluster Group			
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Support	72%	73%	79%	67%	56%	72%	65%	74%	68%	93%	76%	80%	73%	69%	76%	63%	77%	67%	74%	77%
Oppose	18%	19%	11%	21%	21%	17%	20%	12%	16%	5%	12%	8%	15%	23%	27%	27%	14%	21%	16%	13%
No opinion	11%	8%	11%	12%	23%	11%	14%	14%	15%	2%	13%	12%	12%	9%	12%	11%	9%	12%	10%	10%
For each of the following national proposals indicate whether you support it or oppose it? - Lessen Corporate Income Tax Deductions																				
	Total	Region									Industry						Cluster Group			
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Support	44%	47%	46%	45%	41%	41%	45%	39%	35%	40%	46%	43%	54%	43%	36%	44%	47%	41%	48%	39%
Oppose	40%	41%	44%	41%	41%	31%	33%	39%	47%	42%	35%	41%	35%	43%	43%	42%	38%	43%	37%	42%
No opinion	16%	12%	11%	14%	18%	28%	22%	22%	18%	19%	19%	16%	12%	14%	21%	14%	15%	16%	15%	19%
For each of the following national proposals indicate whether you support it or oppose it? - Extend Unemployment Benefits																				
	Total	Region									Industry						Cluster Group			
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Support	21%	27%	23%	19%	31%	15%	20%	20%	14%	21%	19%	10%	15%	16%	23%	32%	17%	25%	19%	17%
Oppose	69%	64%	67%	70%	64%	80%	73%	74%	67%	70%	68%	82%	67%	77%	64%	59%	77%	66%	71%	71%
No opinion	10%	10%	11%	11%	5%	6%	6%	6%	19%	9%	13%	8%	17%	8%	13%	9%	6%	9%	10%	12%
For each of the following national proposals indicate whether you support it or oppose it? - Enact a Temporary Reduction in Employer Payroll Taxes																				
	Total	Region									Industry						Cluster Group			
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Support	55%	61%	63%	48%	49%	44%	47%	65%	54%	65%	55%	57%	48%	57%	57%	60%	48%	56%	54%	58%
Oppose	28%	25%	25%	33%	33%	33%	31%	28%	24%	23%	30%	31%	27%	29%	19%	24%	43%	28%	28%	27%
No opinion	17%	14%	12%	19%	18%	22%	22%	7%	22%	12%	15%	12%	25%	14%	25%	16%	10%	16%	18%	15%
For each of the following national proposals indicate whether you support it or oppose it? - Increase the Income Taxes Paid by Those Earning over \$250,000 a year																				
	Total	Region									Industry						Cluster Group			
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Support	42%	41%	39%	44%	51%	46%	45%	41%	34%	35%	41%	33%	35%	36%	45%	54%	34%	48%	39%	34%
Oppose	50%	50%	49%	47%	41%	44%	47%	51%	54%	60%	48%	61%	58%	58%	43%	38%	59%	45%	51%	58%
No opinion	9%	9%	12%	8%	8%	9%	8%	9%	11%	5%	11%	6%	8%	6%	8%	7%	7%	7%	10%	8%
For each of the following national proposals indicate whether you support it or oppose it? - Increase exploration and development of domestic sources of energy																				
	Total	Region									Industry						Cluster Group			
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Support	88%	86%	84%	88%	90%	85%	86%	87%	89%	98%	88%	94%	87%	92%	83%	86%	90%	89%	88%	86%
Oppose	5%	5%	5%	5%	8%	2%	10%	1%	4%	2%	4%	4%	10%	3%	5%	6%	3%	3%	5%	6%
No opinion	7%	9%	11%	6%	3%	13%	4%	12%	8%	0%	8%	2%	4%	5%	13%	8%	6%	8%	7%	8%

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For each of the following national proposals indicate whether you support it or oppose it? - Cap Annual Increases in Federal Regulatory Spending at Zero Dollars																				
	Total	Region									Industry							Cluster Group		
		Philadelphia /Allentown	Allentown	Pittsburgh /Erie	Erie	Harrisburg	York	Scranton	Lancaster	Reading	Engineering & Construction	Food & Beverage	Financial	Manufacturing	Retail	Service	Wholesale & Distribution	High	Middle	Low
Support	69%	63%	56%	69%	56%	65%	76%	70%	76%	79%	78%	67%	65%	73%	61%	61%	77%	61%	72%	76%
Oppose	13%	17%	14%	12%	15%	11%	12%	12%	9%	7%	9%	14%	19%	9%	10%	19%	12%	18%	11%	6%
No opinion	18%	20%	30%	19%	28%	24%	12%	19%	15%	14%	13%	18%	15%	18%	29%	19%	10%	20%	17%	18%