



SEICA

SOUTHEASTERN INSULATION CONTRACTORS ASSOCIATION

NEWSLETTER



SEICA's
2023 Spring
Conference

p. 12

Economic
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SUMMER 2023





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2023 NUMBER 3—SUMMER EDITION

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A Quarterly Publication of the Southeastern Insulation Contractors Association

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SHARE YOUR OPINION WITH SEICA!

As members of SEICA, your input and ideas are critical for the success of this newsletter. We welcome your thoughts on useful, current, interesting, and informative content for the SEICA Newsletter. We invite you to become a regular contributor—please send your ideas and content to director@seica.org. You will be glad you did!



***"For with God
nothing shall be
impossible."
Luke 1:37***

President's Message

Hello, SEICA family. I hope you all have had a wonderful summer and are looking forward to fall. Thank you to everyone who joined us in Point Clear, Alabama. We had a great meeting, and it was such a wonderful time to fellowship, network, and just be together. I hope to see you all in Nashville for our next conference.

Speaking of the next conference, I will be passing over my presidential duties. It has truly been a pleasure to serve this association. We have seen lots of changes in SEICA since I was first asked to join the Board a hundred years ago 😊. As a Board and as your President, I feel like we have made many improvements to SEICA.

I have learned so much about the industry since I first stepped foot into that Sunday morning Board meeting many years ago. I have met some wonderful people who now are lifetime friends and family. I will always treasure this opportunity I had to serve as your President and will continue to help and grow SEICA.

I look forward to seeing you all at our fall meeting at the Omni in Nashville, Tennessee, October 8-10, 2023. If all goes well, hopefully I will get to play "Rocky Top" for you a couple of times during our time together. GO VOLS!

Katie Burell

SEICA President

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Executive Director's Report

Thank you to everyone who joined us in beautiful Point Clear, Alabama, in June at the Spring Conference! We had more than 100 attendees at the event, with 16 being first-time attendees or guests. Check out a full event recap and photos on page 12.

If you could not join us in the spring, we hope to see you this fall at the Omni Nashville Hotel, October 8-10, 2023. Registration and room reservations are now open for the event, and you won't want to miss out on the reception and dinner on Monday evening at the Country Music Hall of Fame and Museum! Turn to page 26 to read more.

Another exciting update I wanted to share is that SEICA's Board of Directors has approved a special conference rate for individuals who have retired from the industry. We want to make sure you stay involved and continue to attend our events and share your knowledge with SEICA members!

I am also thrilled to announce that we were able to offer the Rick Huggins Scholarship to Collin Caldwell for the 2023-2024 school year. This scholarship fund offers academic scholarships to assist students interested in pursuing a career in engineering, design, construction, and related professions. Read more on page 24.

Lastly, you can now connect with your insulation industry network on SEICA's newly created LinkedIn page. Scan the QR code in this issue to get connected!

It has been a busy summer so far, and as always, please reach out to me if you need anything. I hope to see you in Nashville this fall.

Erin Penberthy

SEICA Executive Director

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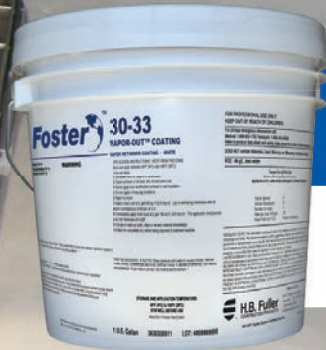
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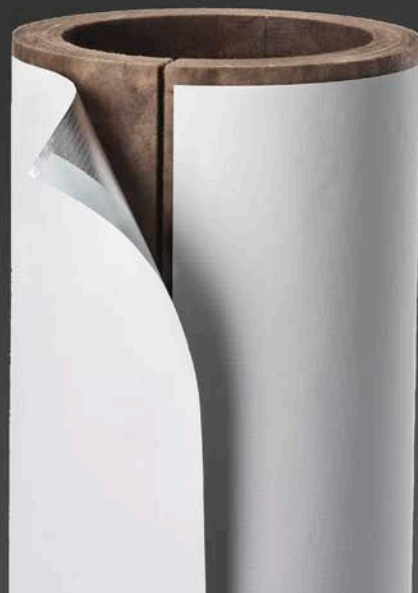
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Application shall be made in writing, accompanied by initiation fee and dues. Members shall be elected by the Board of Directors with an affirmation vote of most of the members of the Board of Directors. The initiation fee shall be Twenty Five Dollars (\$25.00) payable at the time of application

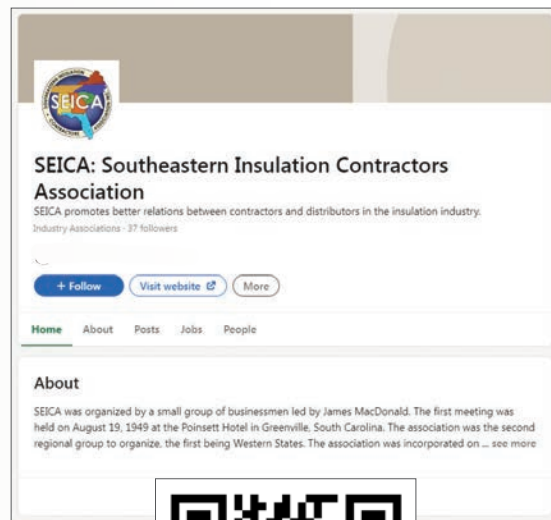
for membership. The amount and method of payment shall be such as may be determined by the Board of Directors.

Only active members shall be entitled to vote in the affairs of the Association and each active member shall be entitled to one vote.

A branch office of a member who desires to receive the benefits of SEICA is eligible for membership. The branch office shall pay annual dues as herein prescribed but shall not be liable for an initiation fee if its principal office is a member at the time it applies for membership.

SEICA Is Now On LinkedIn!

Scan the QR code to connect with SEICA on LinkedIn so you can stay up-to-date with your insulation industry network!



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SEICA's 2023 Spring Conference— Connections, Inspiration, and Education with Our SEICA Network!

More than 100 SEICA attendees gathered in June at the Grand Hotel Golf Resort & Spa in Point Clear, Alabama, including 16 first time attendees and guests, for the 2023 SEICA Spring Conference! The stunning property featured unforgettable southern hospitality, along with beautiful views of the picturesque beach hamlet of Point Clear. The hotel is a best-kept secret, offering family-friendly activities near the town of Fairhope.

Amid the beauty of their surroundings, attendees got to hear from five different speakers on a variety of insulation industry and business leadership topics. First up was Brian Reaves, a Motivational Magician, who discussed simple steps on how to tackle impossible problems that span both your professional and personal life. His pre-

sentation was filled with lots of laughs and a few magic tricks that kept attendees guessing!

Then Trae Vaughan, Vice President of Commercial Lines for Brock Insurance, shared insights on current industry trends and how they are impacting business insurance costs. Using real-life examples, attendees learned about strategies that they could implement within their own businesses and took advantage of the Q&A session to gain insights on their most pressing issues.

Attendees also were inspired by Jody Fuller who shared his inspirational journey from a poor, stuttering kid in Alabama to the battlefields of Iraq to center stages around the world. His message focused on how to persevere, adapt, and overcome when facing ever-present challenges in our lives.



95%

of survey respondents rated the Conference as excellent or good



82%

of survey respondents learned new information

Attendees also heard from NIA President Laura Dover—a proud SEICA member—who talked about her yearlong theme, *Better Together*, and shared her first-hand experience of the importance of the industry’s associations and the benefits of decades-long relationships built and strengthened to make our businesses and industry stronger. Laura also challenged everyone to participate and attend NIA’s 2024 Annual Convention, which will take place at the Naples Grande Beach Resort, in Naples, Florida, April 17–19, 2024. Laura would love to be surrounded by her SEICA family at the NIA event where her year as NIA President comes to an end!

Lastly, attendees heard from NIA Vice President Kristin DiDomenico who provided a comprehensive overview of NIA’s new Education Center, which is an on-demand training portal and national resource for information and training tools for the mechanical insulation industry. For more information about NIA’s Education Center, please visit www.niaeducationcenter.org.

What a lineup of speakers to learn from in just 2 short days! To recommend a speaker or topic suggestions for future events, please email SEICA Executive Director Erin Penberthy at director@seica.org.





Honoring Phil Davenport for His Service to SEICA

Another special moment was provided by SEICA President Katie Burell of Breeding Insulation who presented Phil Davenport with an award for his years of service as SEICA's Executive Director from 2018 to 2022. SEICA members offered their heartfelt appreciation to Phil for his dedication to the association and the industry.



Plenty of Time for Networking and Connecting

On 2 nights, attendees gathered for a full evening of networking where past attendees and first timers were welcomed with delicious meals, premium open bar, and fabulous networking. Plus, attendees enjoyed the entertainment provided by a local musician on Monday night. Catching up with industry friends and families is most certainly a special highlight of each SEICA gathering, as the event photos definitely capture!



Congratulations to all the winners of SEICA's Golf Tournament!

SEICA held another successful golf tournament during the event at the beautiful Lakewood Golf Course!

1st Place, 1st Flight:

Scotty Burnette (Breeding Insulation), JD Lile (Vimasco), and Brian Loftus (Knauf Insulation)

2nd Place, 1st Flight:

Joe MacEachern (SPI), Frank McCloud (Alkegen), and Tyler Avery (Distribution International)

1st Place, 2nd Flight:

Chris Harster (BrandSafway Solutions), Ryan Capps (Johns Manville), and Sam Penney (Brock Insurance)

2nd Place, 2nd Flight:

Daniel King (Performance Contracting, Inc.), Phil Chuy (Armacell), and Juan Romero (SPI)

Closest to the Pin #8:

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See You this Fall in Nashville

Thank you to everyone who made SEICA's 2023 Spring Conference such a wonderful gathering! If you were not able to attend the Spring Conference in Point Clear, do not miss out on joining your SEICA colleagues at the Omni Nashville Hotel, October 8-10, 2023. Learn more about the 2023 SEICA Fall Conference on page 26.



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Examining Hazards beyond Physical Demands

From the National Institute for Occupational Safety & Health (NIOSH): Psychosocial hazards often overlooked in the construction industry

By Aurora B. Le, Doug Trout, Ann Marie Dale, and Scott Earnest

Why Do Psychosocial Factors of Work Matter?

The construction industry has considerable safety and health hazards that result in high rates of injury, illness, and fatality. Common hazards include noise, fall, electrical, and chemical hazards. Approximately 60% of all construction fatalities each year can be attributed to the “ (see <https://tinyurl.com/cz4zn5h8>) of falls, struck-by, caught in and between, and electrocutions.¹ Construction occupational safety and health (OSH) has traditionally focused on eliminating, mitigating, and managing those hazards that are common in many construction workplaces.

Other critical threats to construction workers that may be overlooked are psychosocial factors of work. Psychosocial factors are the social, organizational, and managerial features of a job that affect the worker’s feelings, attitudes, behaviors, and physiology. Psychosocial factors can result in physical or mental health impacts in the workplace.^{2,3} Even though psychosocial factors are often not as easy to observe as physical hazards, and may be more abstract in concept, they are important and should not be dismissed. It is well documented that work affects mental health and vice versa.⁴ The combined impacts of physical and mental health have been in the spotlight since the beginning of the COVID-19 pandemic.

Working conditions such as high demands, low control over work tasks, lack of support from a supervisor or coworkers, and job dissatisfaction are all examples of negative psychosocial factors that can cause adverse health effects. These health effects can include heightened stress^{2,3}; poor safety outcomes (e.g., higher injury rates, more frequent incidents)⁵⁻⁷; greater risk for cardiovascular dis-

ease; and higher susceptibility to musculoskeletal disorders, sleep disorders, and gastrointestinal issues.³ To ensure the health, safety, and well-being (<https://tinyurl.com/bdvh3jtt>) of the construction workforce, it is important for owners, contractors, and supervisors to also consider and address adverse psychosocial factors in their workplace.

Psychosocial Factors of Work in Construction

How do psychosocial factors affect worker risks in construction? As an example, construction workers are particularly prone to developing musculoskeletal disorders (MSDs) (see <https://tinyurl.com/5n8674b7>) due to the nature of their work—manual lifting and material handling, repetitive motions, vibrations, frequent heavy exertion, and variable working conditions. MSDs contribute to one in five nonfatal injuries in the construction industry.⁸ While MSDs are the outcomes from physical exposures of construction work, extensive literature has shown that psychosocial factors contribute to the development of MSDs as well.⁹⁻¹³ Stress and adverse psychosocial factors can make workers more prone to injury and negatively impact the functioning of multiple organ systems.¹⁴ Research focused on psychosocial factors and the construction industry has found strong evidence that low job satisfaction, high perceived job stress and unrealistic job goals or expectations, and perceived lack of control over the work environment resulted in greater lower back and neck or shoulder pain among construction workers.⁹⁻¹¹ To prevent MSDs, it is important to consider contributing factors beyond the physical demands.





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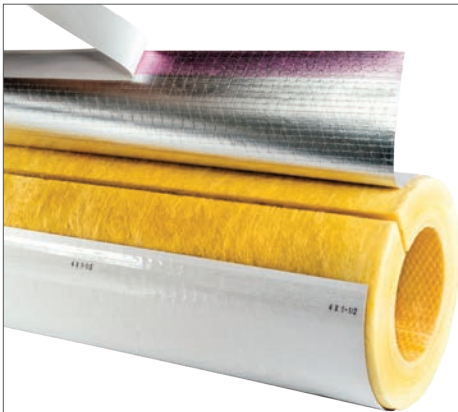
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Additionally, there is growing evidence that workplace psychosocial factors may contribute to mental health disorders, suicidal ideation, and harmful substance use among construction workers (see <https://tinyurl.com/4rkxtbba>). Each of these issues are serious problems in the construction industry today. In a study of young Australian construction workers, job stress, workplace bullying, and perceived lack of social support contributed to a worker's level of psychological stress which, in turn, was linked to illicit drug use (e.g., methamphetamines, cannabis).¹⁵ In other construction studies, low job control (perceived lack of control over the work environment) was found to be related to illicit drug use in the workplace.^{16,17}

Suggestions for Construction Owners, Contractors, and Supervisors

For owners, contractors, and supervisors to address psychosocial factors in the workplace, these factors must first be characterized. There are many existing questionnaires available to measure psychosocial factors of work, including the short-version of the effort-reward imbalance scale (see <https://tinyurl.com/mz2ht9w4>) and Job Content Questionnaire (JCQ) (see <https://tinyurl.com/yc86bamp>). Research has shown that workplace safety climate can influence safety behaviors, injuries, and health outcomes in the construction industry.^{7,18} A useful tool to help construction workplaces characterize and improve safety climate is the Center for Construction Research and Training's (CPWR's) Safety Climate Assessment Tool, which is also available in a version for small contractors (see <https://tinyurl.com/4zrfwwzr>).

After identifying the contributing psychosocial hazards, leadership can determine which factors can be feasibly addressed. This may require leadership to assess current practices and policies and address deficiencies. For example, if employers find that low job satisfaction is the most prevalent psychosocial factor, subsequent worker focus groups or one-on-one interviews can be conducted to find reasons contributing to low job satisfaction and develop solutions—both short-term (e.g., ask employees for feedback, celebrate successes) and long-term (e.g., improving wages, benefits and job security, and assessing managerial style).¹⁹

Psychosocial factors of work impact overall health, including mental health. Now more than

ever, it is critical for employers to understand the importance of addressing mental health concerns when they arise and be able to direct their workers to mental health resources (e.g., employee assistance program, health insurance that covers mental health care). Additional resources include:

Visit www.osha.gov/workplace-stress for OSHA's resources on addressing Workplace Stress and access "Supporting Mental Health in the Workplace: Getting Started Guide for Senior Managers" here: <https://tinyurl.com/3t4fscbj>.

NIOSH's training and resources for health workers and mental health that can be adapted for construction is available at <https://tinyurl.com/5mxveabb>.

Access the National Institute of Environmental Health Sciences Worker Training Program's "Initiatives to Prevent Opioid Misuse and Promote Recovery Friendly Workplace Programs" via <https://tinyurl.com/5ffaryty> and additional training resources at <https://tinyurl.com/5ffaryty>.

Visit <https://tinyurl.com/48ebds2t> to access CPWR's information repository on mental health and substance use disorders.

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Aurora Le, PhD, MPH, CSP, CPH, is the John G. Searle Assistant Professor of Environmental Health Sciences at the University of Michigan School of Public Health. Douglas Trout, MD, MHS, is Deputy Director for the Office of Construction Safety and Health. Ann Marie Dale, PhD, is with the Division of General Medical Sciences, Washington University School of Medicine in St. Louis, Missouri. Scott Earnest, PhD, PE, CSP, is the Associate Director for the NIOSH Office of Construction Safety and Health.

Reprinted with permission from the NIOSH Science Blog on the Centers for Disease Control and Prevention website (<https://blogs.cdc.gov/niosh-science-blog/2023/02/15/construction-psychosocial-hazards>). Visit www.cdc.gov for more information and resources.

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SEICA NEWSLETTER— Now Available Digitally!



The Board of Directors voted to redesign the SEICA newsletter, and we hope you like the changes!

Future newsletters will be posted online at www.seica.org/newsletters and an electronic PDF will be emailed to the full SEICA membership.

If you would like to be added to SEICA's contact list, or would like to provide feedback on the newsletter, please email Erin Penberthy at director@seica.org.



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CONGRATULATIONS *Collin Caldwell!*

SEICA'S RICK HUGGINS SCHOLARSHIP RECIPIENT

SEICA is proud to offer the Rick Huggins Scholarship Fund, which offers academic scholarships to assist students interested in pursuing a career in engineering, design, construction, and related professions.

The Scholarship Committee, comprised of Chair Brandon Dambach (SPI), Greg Bucy (Owens Corning), and Juan Romero (SPI), diligently reviewed the applications for the 2023-2024 Rick Huggins Scholarship Competition. After careful evaluation, the committee and SEICA's Board of Directors approved Collin Caldwell as the deserving recipient of a \$1,000 scholarship.

Applications were evaluated based on each applicant's past academic performance; coursework related to the engineering, design and construction industry; financial need; extracurricular activities; community involvement; work history; and attitude.

Collin Caldwell is a junior at the University of Georgia and will graduate next year. His father, Chris Caldwell, is a member of SEICA through Caldwell Insulation. The scholarship will provide Collin with additional resources to further his educational pursuits.

The Rick Huggins Scholarship is offered every year, and applications for next year's scholarship will be available later this year.

Visit www.seica.org/scholarship-program for more information.



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SEICA 2023 FALL CONFERENCE

Registration Now Open!



What: SEICA 2023 Fall Conference
Where: Omni Nashville Hotel, Nashville, Tennessee
When: October 8-10, 2023
Registration Deadline: September 12, 2023
Register at www.seica.org/2023-fall-conference.



Our Location: Omni Nashville Hotel

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Join Us and Bring Your Family

With our location near Ryman Auditorium, Music City Center, Bridgestone Arena, and iconic Broadway, SEICA's Conference hotel puts attendees close to all the best Nashville has to offer.

Visit the hotel's website (<https://www.omni-hotels.com/hotels/nashville/things-to-do>) for more details on local attractions, sample itineraries, and tours.

Networking Reception and Dinner

Monday, October 9, 2023

Country Music Hall of Fame and Museum

The Country Music Hall of Fame® and Museum has been called the “Smithsonian of country music” for collecting, preserving, and interpreting the evolving history and traditions of country music. Through exhibits, publications, and educational programs, the museum teaches its diverse audiences about the enduring beauty and culture importance of country music.

Our Networking Reception and Dinner will take place in the Hall of Fame Rotunda, which was designed to recognize Country Music Hall of Fame members in a style befitting the high honor of membership. The likenesses of all the Hall of





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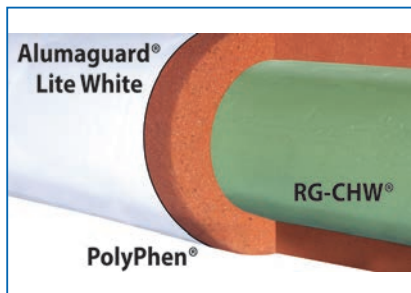
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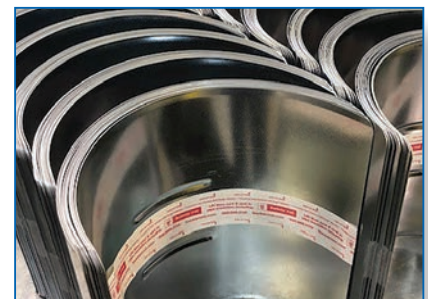
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Fame members proudly ring the walls of the rotunda on bronze plaques that are arranged to symbolize notes on a musical staff.

Please note that transportation is not provided—the museum is only a few minutes' walk from the Omni Nashville Hotel.

In addition, a voucher for visiting the museum (valued at \$27.95 per adult ticket) is included as part of your SEICA registration. Registered attendees can pick up their voucher at the on-site SEICA registration desk. You can use the voucher during the week of the SEICA event to enjoy the museum when it works best with your schedule.

Now Available: Conference Retiree Rate

SEICA is excited to offer a special conference registration rate for individuals who have retired from the industry. Retirees now can attend the events at a discounted rate of \$550 (compared to \$775). We value and appreciate your support of the industry over the years and hope you will continue to stay involved and share your wealth of knowledge with SEICA members!

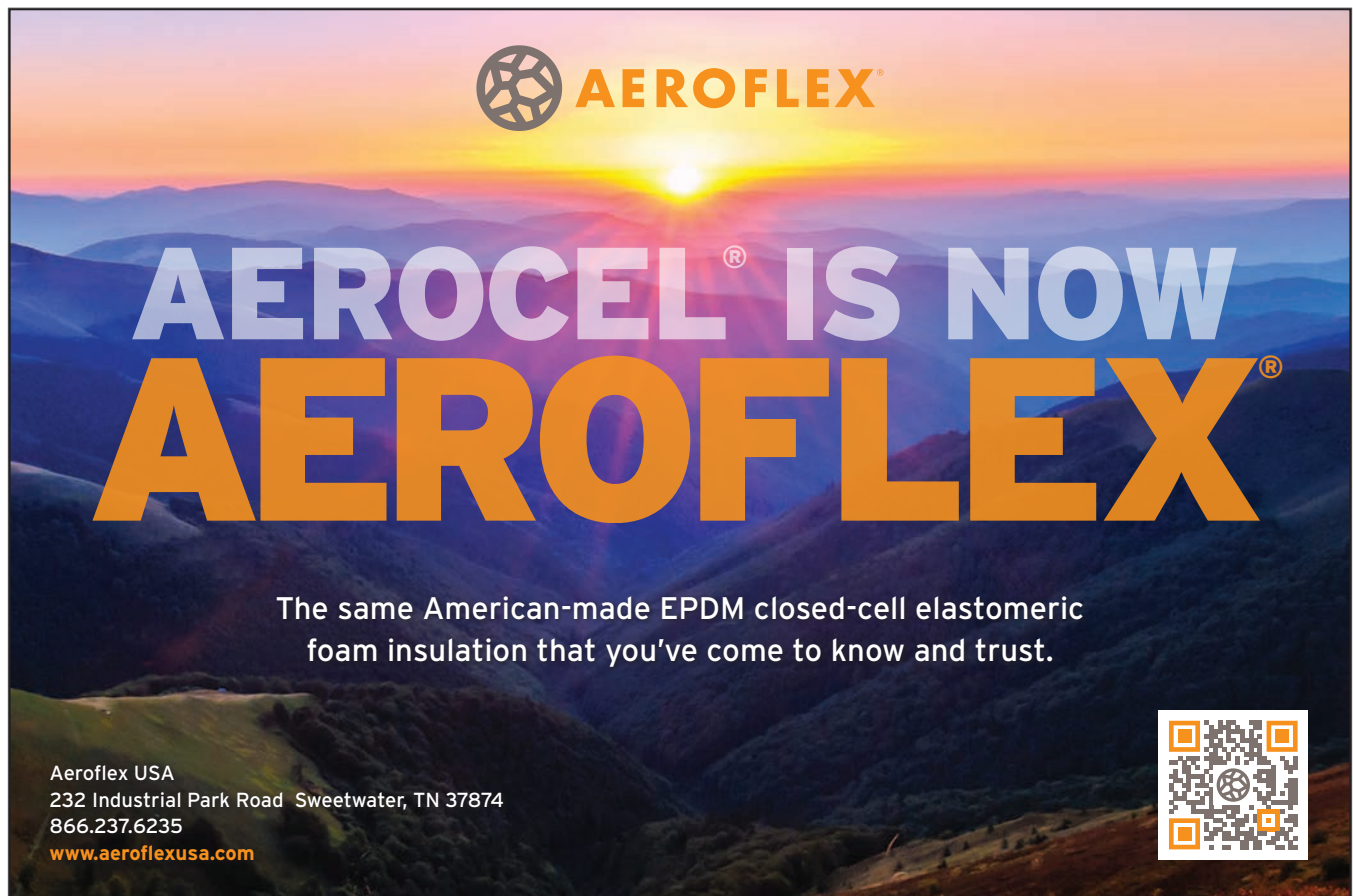
SEICA Golf Tournament: Gaylord Springs Golf Links

Gaylord Springs, designed by U.S. Open and PGA Champion Larry Nelson, offers challenges for golfers of any skill level. The links-style course demands accuracy to stay clear of the deep bunkers, water hazards, and rolling grass mounds. It also requires creativity and a soft touch around the MiniVerde Bermuda grass greens. Carved from the banks of the Cumberland River and bordered by limestone bluffs and wetlands, Gaylord Springs Golf Links will test and excite you from the moment you tee off!

Please note that the golf course is located approximately 20–25 minutes from the Omni. Individual transportation is required—group transportation will not be provided.

More Information to Come

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Legislative Update



Bipartisan Federal Mechanical Insulation Act (FMIA) of 2023 Introduced in U.S. House of Representatives

The FMIA, House Resolution 4663, will advance federal energy efficiencies, save tax dollars, and reduce energy loss and emissions for the approximately 350,000 federal buildings in the United States. It also will add an important audit metric for regulators to include when assessing federal buildings' measure of mechanical insulation efficiencies. The FMIA was introduced on July 14, 2023, by Rep. Randy Weber (R-TX) and Rep. Linda Sanchez (D-CA) to the House of Representatives.

Currently, the National Energy Conservation Policy Act (NECPA), part of the National Energy Act of 1978, sets out an array of measures intended to promote energy conservation in all three sectors of U.S. energy use: buildings, industry, and transport.

Section 432 of the Energy Independence and Security Act of 2007 (EISA) makes changes to Section 543 of the NECPA and creates a statutory requirement for federal agencies to

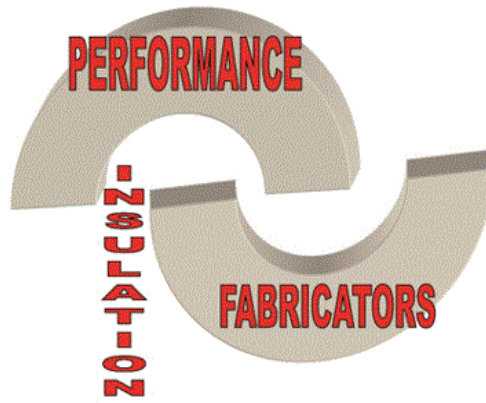
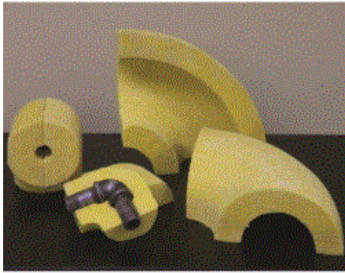
conduct energy and water use evaluations, which include energy audits, of federal buildings.

While Section 432 of EISA does not define "comprehensive energy and water evaluations," Department of Energy guidance provides some guidelines for audits as part of these evaluations. The new legislation would clarify that mechanical insulation energy audits qualify under "comprehensive energy and water evaluations."

In recognition of the important role that mechanical insulation plays in lowering operating expenses, reducing energy loss, and decreasing emissions, the legislation makes the following specific changes to portions of the EISA:

- Defines "mechanical insulation property" as materials, facings, and accessory products that are part of a mechanical system and that reduce energy loss from that mechanical system, thereby allowing for the inclusion of these items as qualifying energy and water efficiency measures.
- Expands the definition of "energy and water evaluations" to include identification of energy- and water-saving measures (including installation of mechanical insulation property, if applicable).

Read a press release at <https://tinyurl.com/2p8frnkw>, and track the bill at <https://tinyurl.com/yck2uh7w>.



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NEWS FROM THE National Insulation Association (NIA)



NIA's Education Center: Earn Professional Development Credits

NIA's Education Center continues to improve and now offers 12 courses that offer professional development hour (PDH) credits. The on-demand platform now includes 55 microlearning courses totaling 22 hours of educational content available—including content that is free for NIA members and paid content for Premier Training Subscribers. The platform is gaining a foothold with 55 companies signed on representing more than 850 users.

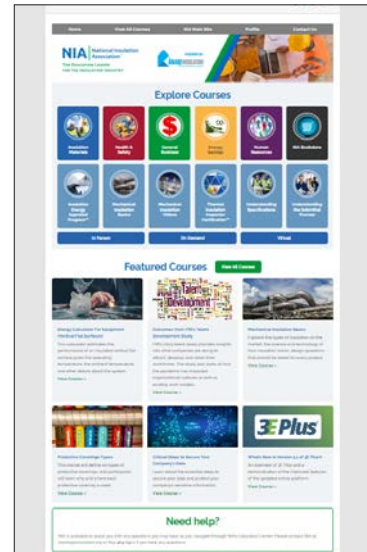
New course modules are being added continuously in the areas of insulation materials, health and safety, general business, energy savings, and human resources—relevant content for all companies in the insulation industry. The course content with PDH credits include:

Free for NIA Members

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- Passive Fire Protection in Industrial Applications
- Safety Update: Heat Illness Prevention
- What's New in Version 5.1 of 3E Plus®

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- What Does the Future of Transportation Look Like?



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- Visit our FAQ web page for a list of common questions, or check out a 4-minute demo on NIA's Education Center.
- NIA's training team is happy to answer any questions. Contact them at training@insulation.org.

Learn more about how to subscribe, and free, members-only, and subscription content here: www.insulation.org/niaeducationcenter or explore the platform at www.niaeducationcenter.org.

Insulation Outlook Magazine Opportunities and Highlights System-Specific Product Columns

By popular request, NIA is continuing to offer free editorial space to NIA member in *Insulation*





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Check Out the Archives, Including the Industry Message from SEICA's Laura Dover

Not only does NIA feature the current issues of *Insulation Outlook* magazine (NIA posts the issue online one month after the issue date, e.g. the August issue gets posted in September), you can search archived articles by keyword and author here: www.insulation.org/io/archives.

A new addition to the archives is the monthly "Industry Message." Visit www.insulation.org/io/in-

[dustrymessages](#) to read what is on the mind of NIA's President. Take a few minutes to read SEICA's own Laura Dover's messages on her theme of *Better Together!*

Registration for NIA's Fall Summit Is Open

Fall Summit is NIA's members-only meeting that features topical speakers, open meetings by industry type, networking opportunities, and much more. Registration is now open for NIA's Fall Summit 2023, taking place October 25-26 at the MGM National Harbor in Maryland. Register at the early-bird rate and reserve your discounted room by October 2. Visit www.insulation.org/fallsummit2023 for more information.

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BATON ROUGE, LA

Economic Outlook: Insights on Small Business

By Anirban Basu and Zack Fritz

Small business owners are feeling sad these days, and by “these days,” we mean for the past year and a half; the National Federation of Independent Business’ (NFIB) Small Business Optimism Index (<https://tinyurl.com/3t75cdk8>) has been below the half-century average for 18 straight months. Some of this pervasive glumness is justified, but a good portion of it appears to be disconnected from economic performance. What is to blame?

Inflation and Labor Shortages, Obviously

Inflation (you might have heard about it) has been way too fast the past few years, and as of June, 24% of small business owners cited inflation as their biggest problem. That is down from a record of 41% last July but still higher than at any point prior to the pandemic (and the data series goes back to 1986).

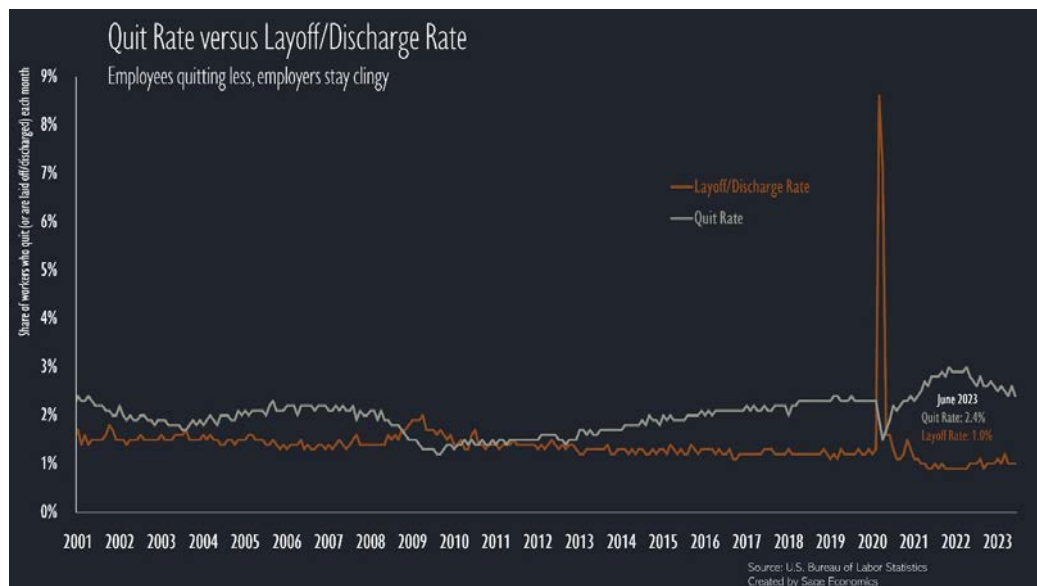
When input prices rise, businesses can either pass along the cost increases to customers and hope they keep buying the same volume or trim their margins in order to stay competitive. Neither option is ideal, and labor shortages have compounded the pain of inflation.

Not only is it difficult to find workers to fill open positions, but employers are also struggling to keep the employees they have. About one in four NFIB members listed quality of labor as their biggest problem in June.

As we have documented, workers are still quitting their jobs at an unprecedented pace, though the quit rate has cooled off a bit over the past year (see *Figure 1*).

Put simply, workers know they can earn more by finding a new job. Over the past year, the median job changer has received a significantly

Figure 1





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larger pay increase than the median job stayer (<https://tinyurl.com/mrb3h8rc>). This has accelerated turnover while putting upward pressure on wages; average hourly earnings for private production employees are up more than 21% since the start of the pandemic in nominal terms and about 3% in real terms.

This table (see *Figure 2*) shows how NFIB members responded to a question about raising compensation. While wage pressures have cooled, the last few years were obviously tough in that regard.

It might seem like these factors—inflation, labor shortages, and rising compensation costs—would affect small and large businesses the same, but that is not the case.

Small businesses do not have the economies of scale to compete with large companies on wages. Amazon can sell a book at a few pennies (or fewer) of profit. The cozy independent bookstore down the street needs considerably larger margins to survive. That is why Amazon has been lobbying for a \$15 minimum wage the past several years; they can afford it. Their smaller competitors can't. Amazon is a for-profit machine, not a charity.

Beyond profit margins, labor shortages cause headaches for small business owners, but probably not for executives at big businesses. Amazon has the equivalent of a small army devoted to hiring. Your local dentist, as an example, is probably interviewing hygienists themselves. The small business owner, lacking an HR department, is

also more likely to be involved in the timely process of onboarding new hires.

Industry Concentration and the Pandemic

There is a common narrative that small business is suffering because of greater market power enjoyed by large firms as industries become more concentrated. At least in the years leading up to the pandemic, that was not the case. As indicated by the Information Technology & Innovation Foundation (<https://tinyurl.com/nhjahj2>), “Despite widespread claims of widespread monopolization, just 4% of U.S. industries are highly concentrated, and the share of industries with low levels of concentration grew by around 25% from 2002 to 2017.”

More current research (www.nber.org/papers/w30285) indicates that market concentration expanded during the pandemic. “The disproportionate closing of small businesses led to a sharp concentration of market share among larger businesses...with only a partial reversal after the initial increase. The findings highlight the fragility of small businesses during a large adverse shock and the consequences for the competitiveness of markets.”

While the dust is still settling, it is unclear when/if industry concentrations will revert to pre-pandemic norms. It may very well be the case that some fraction of small business sadness is attributable to market share lost to larger firms due to behavioral and other shifts caused by the pandemic.

Figure 2

SMALL BUSINESS COMPENSATION (CONTINUED)

ACTUAL COMPENSATION CHANGES

Net Percent (“Increase” Minus “Decrease”) During Last Three Months
(Seasonally Adjusted)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	31	31	33	33	35	31	32	32	37	34	34	35
2019	36	31	33	34	34	28	32	29	29	30	30	29
2020	36	36	31	16	14	14	15	18	23	23	24	21
2021	25	25	28	31	34	39	38	41	42	44	44	48
2022	50	45	49	46	49	48	48	46	45	44	40	44
2023	46	46	42	40	41	36						





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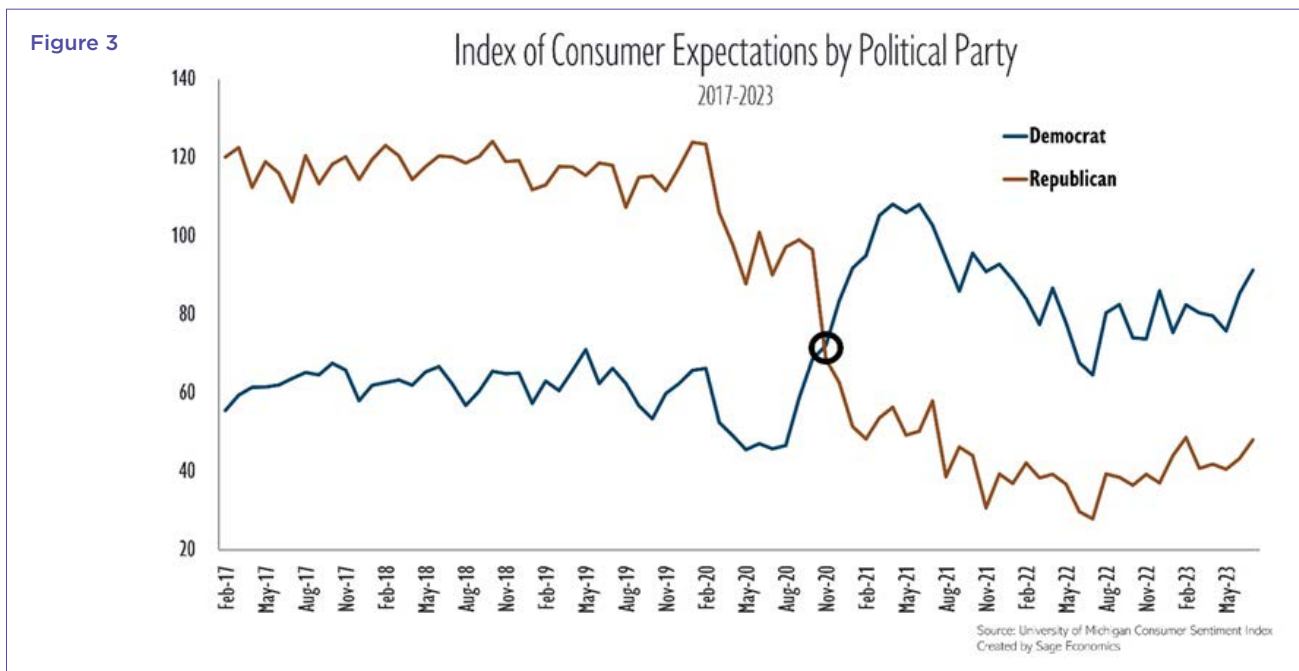
A Slight Disconnect from Reality

As we have talked about, your political party plays a large role in your views on the economy (<https://tinyurl.com/49b8hkcp>). Just look at what happens to consumer expectations following an election (see *Figure 3*).

This matters for small business sentiment; 41% of small business owners are Republicans, while just 23% are Democrats, according to this National Small Business Association survey

(<https://tinyurl.com/2s486w4d>), and the political bias we see in consumer sentiment definitely extends to small business sentiment. Just look at what happened to NFIB's Small Business Optimism Index after the elections in 2016 and 2020 (see *Figure 4*).

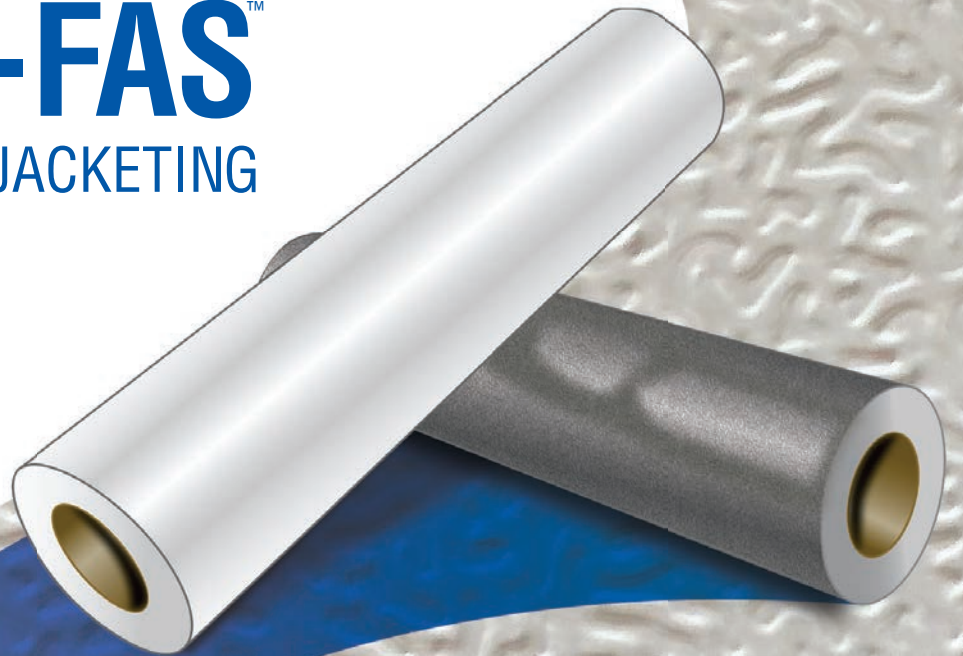
In the U.S. Chamber of Commerce Small Business Index (<https://tinyurl.com/2wk7zf98>), just 14% of small business owners rated the health of their business as *somewhat poor* or *very poor*





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during Q2 2023, but 34% rated the health of their regional economy as *poor* and 57% rated the health of the national economy as *poor*. Put another way, owners think their business is healthy, their regional economy is just okay, and the national economy is on life support.

On an individual basis, the outlook for small businesses is actually fairly upbeat. More than 7 in 10 owners expect their revenues to increase over the next year, and more than 4 in 10 plan to invest more.

The Upshot

Small business owners have the same economic disconnect as consumers (they are just like us!). Yes, there are real issues that are making it harder for small businesses to thrive, and some of those issues probably add to frustration as much as they detract from profits. Recession also seemed like

an inevitability at the start of 2023, and while the economy remains fragile, a contraction is far from certain at this point. Even as the outlook improves, elevated risk and uncertainty are definitely dragging down small business owner sentiment.

Excerpted with permission from Sage Economics. Visit www.sageecon.com for more information.

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