



POLL SUMMARY

2018 State of Manufacturing[®] Survey

Field Dates: March 7—March 28, 2018
 Sample Size: N=400 Manufacturing Executives
 N=123 Oversample outside MSP
 Margin of error for the main 400 sample is +/-4.9%

* Denotes result less than 0.5%.

NOTE: Due to rounding, some figures may be higher or lower by less than one-half of one percent.

Question 1

From a financial perspective, how do you feel right now about the future for your company...

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
79%	78%	83%	82%	82%	84%	89%	90%	94%	93%	TOTAL CONFIDENT
21%	21%	16%	17%	17%	15%	11%	9%	6%	6%	TOTAL NOT CONFIDENT
28%	30%	35%	28%	28%	36%	40%	43%	57%	51%	VERY CONFIDENT
51%	49%	49%	54%	54%	49%	48%	47%	37%	41%	SOMEWHAT CONFIDENT
15%	16%	13%	13%	12%	13%	7%	5%	5%	5%	NOT VERY CONFIDENT
5%	5%	4%	4%	5%	2%	3%	4%	1%	1%	NOT AT ALL CONFIDENT
*	1%	1%	*	*	1%	1%	1%	--	1%	DON'T KNOW/UNSURE
--	--	--	*	*	--	--	--	--	--	REFUSED

Question 2

Thinking about the upcoming year, in 2018, do you anticipate economic expansion, a flat economy, or a recession?

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
8%	26%	40%	32%	34%	37%	42%	32%	58%	64%	ECONOMIC EXPANSION
34%	53%	49%	55%	46%	54%	42%	48%	32%	28%	A FLAT ECONOMY
56%	19%	9%	10%	15%	7%	13%	15%	4%	4%	A RECESSION
2%	2%	3%	2%	5%	3%	3%	5%	5%	4%	DON'T KNOW/ UNSURE
--	--	--	1%	1%	--	--	*	--	--	REFUSED

Question 3

Thinking about the business climate in Minnesota compared to say five years ago, would you say the business climate has gotten better, gotten worse or stayed about the same?

<u>3/17</u>	<u>3/18</u>	
41%	54%	GOTTEN BETTER
18%	14%	GOTTEN WORSE
39%	32%	STAYED ABOUT THE SAME
3%	1%	DON'T KNOW
--	--	REFUSED

Question 4

As you look to 2018, do you project your company's gross revenues to... (ROTATE) increase or decrease compared to 2017, or will they probably stay the same?

(IF INCREASE/DECREASE:) Do you expect your gross revenues to (increase/ decrease) by more than 10% or less than 10%?

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
23%	44%	51%	47%	41%	45%	45%	44%	55%	60%	TOTAL INCREASE
32%	15%	6%	8%	9%	7%	7%	12%	7%	5%	TOTAL DECREASE
11%	29%	30%	25%	25%	23%	25%	25%	35%	36%	INCREASE BY MORE THAN 10%
12%	15%	21%	22%	16%	21%	19%	19%	20%	24%	INCREASE BY LESS THAN 10%
10%	5%	2%	2%	4%	2%	2%	5%	2%	2%	DECREASE BY LESS THAN 10%
22%	10%	5%	6%	6%	5%	4%	7%	5%	3%	DECREASE BY MORE THAN 10%
44%	40%	41%	44%	48%	47%	47%	43%	36%	33%	STAY THE SAME
1%	1%	2%	1%	1%	2%	1%	1%	2%	1%	TOO SOON TO SAY/ DON'T KNOW
*	*	1%	--	1%	1%	*	--	--	--	REFUSED

Question 5

And, as you look to 2018, do you project your company's profitability to **(ROTATE)** increase or decrease compared to 2017, or will it probably stay the same?

(IF INCREASE/DECREASE:) Do you expect your profitability to (increase/decrease) by more than 10% or less than 10%?

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
17%	36%	39%	31%	32%	35%	30%	37%	44%	47%	TOTAL INCREASE
34%	17%	11%	13%	17%	17%	9%	12%	7%	7%	TOTAL DECREASE
9%	21%	21%	17%	16%	18%	14%	20%	27%	27%	INCREASE BY MORE THAN 10%
8%	15%	18%	14%	16%	17%	16%	16%	17%	19%	INCREASE BY LESS THAN 10%
13%	8%	6%	7%	9%	10%	4%	6%	2%	3%	DECREASE BY LESS THAN 10%
21%	10%	5%	6%	8%	7%	5%	6%	5%	4%	DECREASE BY MORE THAN 10%
48%	45%	48%	55%	49%	47%	60%	51%	46%	44%	STAY THE SAME
1%	1%	2%	*	2%	1%	*	*	2%	1%	TOO SOON TO SAY/ DON'T KNOW
--	*	1%	1%	1%	*	*	--	1%	1%	REFUSED

Question 6

And, as you look to 2018, do you project your company's capital expenditures to **(ROTATE)** increase or decrease compared to 2017, or will they probably stay the same?

(IF INCREASE/DECREASE:) Do you expect your capital expenditures to (increase/decrease) by more than 10% or less than 10%?

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
19%	24%	32%	27%	28%	27%	27%	25%	23%	32%	TOTAL INCREASE
37%	24%	14%	24%	20%	19%	17%	19%	12%	11%	TOTAL DECREASE
9%	16%	20%	15%	17%	17%	14%	17%	15%	22%	INCREASE BY MORE THAN 10%
10%	8%	13%	12%	11%	10%	13%	8%	8%	10%	INCREASE BY LESS THAN 10%
12%	9%	6%	11%	6%	4%	6%	8%	4%	5%	DECREASE BY LESS THAN 10%
25%	15%	8%	13%	14%	15%	11%	12%	8%	5%	DECREASE BY MORE THAN 10%
43%	51%	53%	47%	50%	53%	55%	54%	63%	56%	STAY THE SAME
2%	1%	1%	1%	1%	1%	*	2%	2%	1%	TOO SOON TO SAY/ DON'T KNOW
*	--	*	*	1%	1%	*	*	--	--	REFUSED

Questions 7-15

Now, I would like to read you a list of factors that some companies are concerned about. For each one, please rate how concerned your company is about that particular factor using a scale from 1 to 10, where one means that your company is NOT AT ALL CONCERNED about it and where ten means your company is VERY CONCERNED about it. You can choose any number between one and ten depending on how strongly you feel about it.

	<u>10</u>	<u>8-10</u>	<u>5-7</u>	<u>1-4</u>	<u>Mean</u>
<i>(7) Competition from foreign sources</i>					
3/18	7%	13%	29%	58%	4.0
3/17	5%	12%	24%	64%	3.6
2/16	6%	17%	20%	62%	3.8
3/15	8%	15%	25%	60%	3.9
3/14	6%	16%	23%	61%	4.0
3/13	7%	17%	26%	56%	4.1
1/12	7%	21%	23%	55%	4.4
1/11	11%	20%	30%	49%	4.5
1/10	12%	27%	24%	48%	4.8
12/08	8%	18%	27%	54%	4.2
<i>(8) Government policies and regulations</i>					
3/18	17%	40%	38%	23%	6.3
3/17	18%	32%	39%	28%	5.9
2/16	24%	41%	33%	25%	6.3
3/15	28%	46%	30%	23%	6.7
3/14	30%	55%	29%	17%	7.1
3/13	32%	58%	24%	18%	7.2
1/12	33%	56%	29%	15%	7.3
1/11	31%	61%	26%	12%	7.6
1/10	38%	57%	25%	16%	7.3
<i>(9) The costs of health care coverage</i>					
3/18	31%	60%	25%	14%	7.4
3/17	35%	59%	23%	17%	7.3
2/16	30%	51%	26%	22%	6.8
3/15	34%	56%	24%	20%	7.0
3/14	36%	59%	20%	20%	7.2
3/13	44%	67%	17%	14%	7.7
1/12	36%	68%	17%	13%	7.7
1/11	43%	71%	17%	8%	8.2
1/10	42%	68%	17%	13%	7.8
12/08	36%	64%	21%	13%	7.7

	<u>10</u>	<u>8-10</u>	<u>5-7</u>	<u>1-4</u>	<u>Mean</u>
<i>(10) Costs of employee salaries and benefits</i>					
3/18	9%	27%	46%	26%	5.7
3/17	7%	20%	42%	37%	5.0
2/16	6%	19%	41%	39%	4.8
3/15	8%	18%	44%	36%	5.0
3/14	4%	18%	46%	37%	5.0
3/13	7%	19%	45%	34%	5.1
1/12	3%	13%	47%	37%	4.9
1/11	5%	15%	49%	33%	5.0
1/10	6%	16%	46%	34%	5.0
12/08	7%	18%	49%	32%	5.3

**Changed from 2017: Costs of employee salaries and benefits, not including health insurance*

<i>(11) Attracting qualified workers</i>					
3/18	19%	47%	30%	22%	6.5
3/17	12%	31%	36%	31%	5.7
2/16	10%	32%	33%	34%	5.5
3/15	12%	33%	36%	30%	5.7
3/14	10%	34%	35%	30%	5.8
3/13	9%	30%	32%	35%	5.4
1/12	11%	31%	32%	37%	5.5
1/11	4%	14%	37%	45%	4.6
1/10	8%	19%	27%	51%	4.4
12/08	8%	22%	31%	45%	4.8

**Changed from 2017: Attracting and retaining qualified workers*

<i>(12) Retaining qualified workers</i>					
3/18	15%	36%	33%	30%	5.7

<i>(13) Economic and global uncertainty</i>					
3/18	6%	20%	45%	35%	5.1
3/17	7%	17%	42%	40%	4.8
2/16	11%	29%	38%	32%	5.6
3/15	12%	29%	43%	28%	5.8
3/14	11%	31%	46%	24%	6.0

<i>(14) Getting your products to market</i>					
3/18	6%	15%	30%	54%	4.2
3/17	5%	12%	26%	62%	3.8
2/16	3%	12%	19%	68%	3.4
3/15	5%	14%	27%	58%	4.0

**Changed from 2017: The shipping and logistics of getting your products to market*

<i>(15) Developing future leaders</i>					
3/18	8%	25%	40%	34%	5.2
3/17	12%	26%	38%	35%	5.3

**Changed from 2017: Current and future leaders*

Question 16

What would you say are the one or two biggest challenges your company is facing that might negatively impact future growth? Is it... **(RANDOMIZE AND ACCEPT UP TO TWO OPTIONS)**

3/14 3/15 2/16 3/17 3/18

21%	29%	26%	34%	48%	Attracting and retaining a qualified workforce
31%	41%	34%	36%	36%	Cost of health care insurance
29%	20%	15%	18%	34%	Increasing costs of energy and materials for your products
48%	43%	40%	38%	17%	Unfavorable business climate
31%	23%	32%	22%	17%	Lower sales for your products
3%	4%	3%	3%	6%	OTHER
*	1%	1%	1%	*	DON'T KNOW/NOT SURE
*	*	*	--	--	REFUSED

**Changed from 2017: Rising health care and insurance costs; Rising costs of energy and materials for your products; Unfavorable business climate, such as taxes, regulations and policy uncertainties; Weak economy and lower sales for your products*

Question 17

Thinking ahead...what would you say are the two or three most important drivers of your company's future growth? Is it... **(RANDOMIZE AND ACCEPT UP TO THREE OPTIONS)**

3/15 2/16 3/17 3/18

75%	82%	74%	60%	New customers
--	--	--	38%	Maximizing productivity
40%	51%	41%	35%	New products
--	--	--	27%	Better strategic planning and implementation
25%	26%	24%	22%	Developing company managers and leaders
19%	22%	19%	--	Enhancing supply chain relationships
--	--	10%	--	Achieving or upgrading to new ISO 9001:2015 standards
6%	6%	6%	2%	OTHER
1%	5%	3%	1%	DON'T KNOW/NOT SURE
*	*	--	*	REFUSED

Question XI

(ASKED OF N=336) Looking ahead to 2018, do you plan to increase investment in any of the following areas? **(RANDOMIZE AND ACCEPT MULTIPLE RESPONSES)**

- 68% Growing revenue and profitability
- 66% Maximize productivity
- 36% Systems and technology
- 35% Expanding within the United States
- 33% Staff development and culture
- 12% Expanding globally
- 11% ISO business management systems
- 1% OTHER (SPECIFY: __) **(DO NOT READ)**
- 9% None of the above **(DO NOT READ)**
- 1% Don't Know/Refused **(DO NOT READ)**

Question 18

Have or will wages for your employees increase for 2018, or will they decrease or stay about the same?

3/17 3/18

46%	52%	INCREASE
1%	1%	DECREASE
49%	45%	STAY ABOUT THE SAME
3%	1%	DON'T KNOW
1%	*	REFUSED

Question 19

(ASKED IF WAGES WILL INCREASE, N=208) And, what percentage do you expect wages at your company to increase for 2018?

3/17 3/18

53%	51%	UNDER FIVE PERCENT
26%	26%	FIVE PERCENT TO LESS THAN TEN PERCENT
14%	20%	TEN PERCENT OR MORE
7%	3%	DON'T KNOW/NOT SURE

Question 20

Are you currently investing in employee development and leadership training to retain employees?

2/16 3/17 3/18

32%	34%	36%	YES
67%	65%	63%	NO
1%	1%	*	NOT SURE
--	*	*	REFUSED

**Changed from 2017: Are you currently investing in employee development or leadership training in order to attract and retain qualified employees and managers?*

Question 21

Does your company have a structured leadership development program for employees at all levels at your company?

3/15 2/16 3/17 3/18

20%	20%	17%	19%	YES
80%	79%	82%	81%	NO
*	1%	1%	1%	DON'T KNOW/UNSURE
*	--	--	*	REFUSED

**Changed from 2016: Does your company have a formal structured leadership development program for supervisors and managers?*

Question 22

When your company uses automation do you do so because of: **(READ AND RANDOMIZE:1-4. READ :5-6 LAST) (ALLOW MULTIPLE RESPONSES :1-4)**

- 61% Productivity
- 52% Quality of the product
- 45% Safety of the workforce
- 39% Enhancing the work environment
- 4% Don't use automation, but am considering it
- 22% Don't use automation, and am NOT considering it
- 1% DON'T KNOW/UNSURE **(DO NOT READ)**
- * REFUSED **(DO NOT READ)**

Question 23

I am going to read you a few different roles within manufacturing and I would like to know how well you feel your company is prepared to handle the departure of someone in that role.

What impact, if any, would the departure of _____ have on your firm? Would you say a significant impact, some impact, not much of an impact or no impact at all?

	TOTAL IMPACT	SIGNIF IMPACT	SOME IMPACT	NOT MUCH IMPACT	NO IMPACT	DK --- DNR ---	REF ---
<i>(A)</i> The CEO/owner	84%	71%	13%	8%	6%	2%	--
<i>(B)</i> A member of your management team	78%	47%	31%	11%	9%	1%	*
<i>(C)</i> A manager or supervisor	75%	45%	30%	12%	12%	1%	*
<i>(D)</i> A skilled worker	81%	44%	37%	9%	10%	*	--

Question 24

What is the impact of your inability to attract qualified candidates having on your company growth? Would you say it makes things... (ROTATE)

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
55%	40%	45%	58%	60%	67%	71%	66%	68%	70%	TOTAL DIFFICULT
43%	55%	50%	39%	36%	32%	27%	29%	29%	28%	TOTAL NOT DIFFICULT
18%	14%	17%	22%	22%	29%	27%	26%	26%	24%	VERY DIFFICULT
36%	26%	28%	37%	38%	38%	44%	41%	42%	46%	SOMEWHAT DIFFICULT
22%	24%	25%	26%	19%	19%	13%	17%	15%	15%	NOT TOO DIFFICULT
21%	31%	26%	13%	17%	12%	14%	12%	14%	13%	NOT DIFFICULT AT ALL
1%	1%	2%	1%	3%	1%	2%	4%	3%	2%	DON'T KNOW
1%	4%	3%	2%	1%	*	1%	1%	--	*	REFUSED

**Changed from 2017: How difficult is it to attract qualified candidates for your firm's vacancies?*

Question 25

For what reasons have job candidates not taken a job or followed through with an interview? (RANDOMIZE: 1-6) (ACCEPT MULTIPLE RESPONSES)

<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
52%	44%	51%	52%	The skills required for the job didn't match the candidate's
27%	25%	26%	24%	Compensation is not competitive
18%	14%	19%	19%	Long commuting time or distance
16%	10%	16%	18%	Work schedules not flexible enough or don't fit the applicant's desire
23%	16%	14%	17%	The perceived lack of upward job mobility
--	--	--	8%	Lack of child care options
17%	11%	9%	15%	OTHER
6%	16%	12%	9%	DON'T KNOW
1%	2%	2%	1%	REFUSED

**Some answer choices worded differently in previous surveys*

Question 26

When looking to hire new employees, where is your need greatest? (ROTATE)

3/13 3/14 3/15 2/16 3/17 3/18

20%	22%	25%	30%	28%	33%	Entry-level employees
19%	21%	23%	21%	25%	27%	Employees with formal technical training
49%	47%	39%	38%	36%	30%	Employees with on the job experience
6%	6%	6%	4%	4%	4%	Employees with four-year college degrees
--	1%	--	--	--	--	ALL OF THE ABOVE
4%	1%	4%	4%	3%	4%	OTHER
1%	--	1%	*	2%	*	DEPENDS
1%	1%	1%	3%	2%	1%	DON'T KNOW
1%	1%	*	*	--	*	REFUSED

**Changed from 2017: Employees with technical training, Employees with technical training and experience*

Question 27

What types of manufacturing jobs or positions are in most demand at your company?

3/15 2/16 3/17 3/18

29%	32%	38%	41%	Machine operator
23%	25%	20%	24%	Assembler
9%	9%	9%	8%	Welder
--	--	7%	5%	Front office or administrative help
10%	7%	6%	5%	Engineer
4%	4%	2%	2%	Supervisor
--	--	1%	1%	Senior Leadership Position
22%	17%	14%	12%	OTHER
2%	6%	3%	2%	DON'T KNOW
1%	1%	*	*	REFUSED

Question 28

What are some of the things you are doing to navigate around the worker shortage challenges? Are you...? (RANDOMIZE AND ACCEPT MULTIPLE RESPONSES)

61%	Maximizing productivity
49%	Continuing to look for new workers through job postings, ads
32%	Training interns to become employees
24%	Working directly with area tech colleges
9%	Other (SPECIFY: _____) (DO NOT READ)
4%	DON'T KNOW (DO NOT READ)
1%	REFUSED (DO NOT READ)

Question 29

What could local educational institutions do to attract more students into programs?

(RANDOMIZE AND ACCEPT MULTIPLE RESPONSES)

3/17 3/18

-- 55% Enroll more students into manufacturing programs
32% 53% Develop intern programs with local manufacturers
17% 48% Provide in-house/company-specific training
25% 44% Develop better trained graduates

10% 42% Provide equipment-specific training
8% 7% Other (**SPECIFY: _____**) (**DO NOT READ**)
9% 6% DON'T KNOW (**DO NOT READ**)
* 1% REFUSED (**DO NOT READ**)

Question 30

A recent study projects that over the next five years, the number of unfilled jobs across Minnesota will increase from 60,000 to 280,000 and that hardest to fill jobs will be skilled technical positions. After hearing this, which one of the following views is closest to your own? (**ROTATE**)

39% TOTAL WORSE THAN EXPECTED

8% TOTAL BETTER THAN EXPECTED

52% ABOUT WHAT YOU EXPECTED

19% That the shortage of filled jobs is A LOT WORSE than you expected
20% Is A LITTLE WORSE than you expected
52% Is about what you expected
5% Is A LITTLE BETTER than you expected
3% That the shortage of filled jobs is A LOT BETTER than you expected
2% NOT SURE (**DO NOT READ**)
-- REFUSED (**DO NOT READ**)

Question 31

Thinking about this same issue...do you think this problem can be fixed, or not?
(**ASK IF YES:** Would you say yes, this absolutely can be fixed, or more that it can probably be fixed if the right steps are taken?)

74% TOTAL YES

23% TOTAL NO

23% Yes, absolutely
50% Yes, probably
3% Maybe
18% No, probably not
6% Not really sure
* REFUSED (**DO NOT READ**)

Question 32

As you may know, Congress recently passed and the President signed into law comprehensive federal tax reform called the Tax Cuts and Jobs Act. Do you support or oppose the federal tax reform recently passed?

IF SUPPORT/OPOSE ASK: And do you STRONGLY (support/oppose) or just SOMEWHAT (support/oppose) the federal tax reform law?

67% TOTAL SUPPORT
16% TOTAL OPOSE

- 41% STRONGLY SUPPORT
- 26% SOMEWHAT SUPPORT
- 5% SOMEWHAT OPOSE
- 11% STRONGLY OPOSE
- 16% NOT SURE/DON'T KNOW (**DO NOT READ**)
- 1% REFUSED (**DO NOT READ**)

Question 33

And, thinking some more about this new federal tax reform...based on the things that you have seen, read, or heard, do you think that this tax reform plan will (**ROTATE FIRST TWO OPTIONS**)... help your firm or hurt your firm...or do you think it won't have any impact on your firm at all?

- 45% HELP
- 6% HURT
- 42% NO IMPACT
- 7% NOT SURE/DON'T KNOW (**DO NOT READ**)
- * REFUSED (**DO NOT READ**)

Question 34

In what part of the world do you see greatest increase in prospective business? (**READ AND RANDOMIZE: 1-6**)

<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/18</u>	
22%	19%	12%	13%	7%	21%	CHINA
20%	22%	17%	19%	18%	10%	CANADA
10%	9%	13%	8%	10%	8%	EUROPE
--	--	7%	6%	5%	8%	MEXICO
10%	13%	5%	4%	3%	4%	SOUTH AMERICA
6%	4%	2%	3%	3%	6%	INDIA
--	--	4%	--	7%	--	UNITED STATES
1%	--	10%	8%	9%	--	ASIA
1%	2%	1%	10%	4%	19%	Some other place (SPECIFY: _____)
14%	19%	17%	21%	28%	10%	NONE OF THE ABOVE
10%	10%	12%	9%	6%	13%	DON'T KNOW/NOT SURE
2%	1%	1%	1%	1%	*	REFUSED

Question 35

On a different topic, does your company have a formal strategic plan for profitable growth?

3/15 2/16 3/17 3/18

39% 38% 54% 53% YES

59% 60% 45% 47% NO

1% 1% 1% -- DON'T KNOW/NOT SURE

* * * * REFUSED

**Changed from 2016: Does your firm have a formal strategic growth plan?*

Question 36

How does your company plan to grow? I'll read you a few options below and please tell me which comes closest to your current strategy? (**ROTATE**)

27% We have a 1 to 3 year written plan and all staff know their roles and actions to achieve the plan.

18% We have a plan, but that needs to be further communicated with staff

20% Our company has some ideas, but has not yet worked through what our primary focus is, and is not.

28% The strategy is strictly the role of the CEO.

4% OTHER (**SPECIFY: _____**)

3% DON'T KNOW/NOT SURE (**DO NOT READ**)

-- REFUSED (**DO NOT READ**)

Now, I have just a few more questions for statistical purposes only...

Question 37

How many people does your company employ in all its facilities in Minnesota? (**READ LIST IN ORDER**)

12/08 1/10 1/11 1/12 3/13 3/14 3/15 2/16 3/17 3/18

86% 89% 83% 86% 85% 80% 79% 80% 80% 80% UNDER 50

7% 7% 9% 9% 7% 11% 10% 9% 15% 15% 51-150

6% 4% 8% 4% 6% 8% 6% 3% 4% 5% OVER 150

86% 89% 83% 60% 61% 47% 55% 56% 58% 53% UNDER 10

-- -- -- 15% 13% 21% 14% 15% 14% 18% 11-25

-- -- -- 11% 11% 12% 9% 9% 8% 10% 26-50

7% 7% 9% 5% 5% 8% 5% 7% 10% 12% 51-100

-- -- -- 4% 2% 3% 5% 2% 5% 3% 101-150

2% 2% 2% 1% 3% 3% 2% 2% 1% 2% 151 TO 250

4% 2% 6% 3% 4% 5% 4% 2% 3% 3% MORE THAN 250

1% -- -- -- * 1% 1% 6% * -- DON'T KNOW/
NOT SURE

* -- * 1% 1% * 5% 2% 1% * REFUSED

Question 38

What are your annual business revenues? Just stop me when I get to the category that includes your company's total annual revenues. **(READ LIST IN ORDER)**

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
47%	56%	46%	50%	50%	38%	42%	47%	44%	45%	UNDER \$1 MILLION
49%	39%	48%	42%	40%	55%	44%	43%	43%	47%	OVER \$1 MILLION

31%	23%	25%	22%	22%	26%	23%	24%	23%	24%	MORE THAN \$1M TO \$5M
6%	6%	7%	7%	5%	12%	6%	9%	6%	7%	MORE THAN \$5M TO \$10M
5%	5%	6%	5%	3%	7%	5%	5%	6%	6%	MORE THAN \$10M TO \$20M
7%	6%	11%	8%	10%	10%	10%	5%	7%	9%	MORE THAN \$20M
5%	5%	7%	8%	9%	6%	14%	9%	13%	8%	DON'T KNOW/REFUSED

Question 39

Which one of the following best describes your company's primary business? Is it... **(READ LIST AND RANDOMIZE)**

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
13%	16%	15%	13%	14%	17%	20%	17%	20%	15%	METAL FABRICATION
16%	14%	16%	30%	13%	13%	14%	19%	14%	15%	PROCESS MANUFACTURING
37%	29%	22%	17%	26%	25%	18%	26%	12%	14%	PRECISION MANUFACTURING
12%	15%	13%	10%	12%	30%	14%	18%	11%	11%	AN ORIGINAL EQUIPMENT MANUFACTURER, OEM
4%	5%	7%	6%	4%	5%	5%	4%	5%	7%	PLASTICS
4%	3%	6%	5%	1%	5%	3%	4%	3%	3%	ELECTRONICS COMPONENTS
3%	2%	3%	2%	--	2%	1%	2%	2%	1%	INFORMATION TECHNOLOGY, IT
--	--	--	--	--	--	3%	--	--	17%	OTHER MANUFACTURING
--	1%	3%	3%	7%	4%	17%	8%	31%	18%	SOMETHING ELSE
1%	--	*	--	1%	--	*	1%	--	--	DON'T KNOW
*	1%	*	1%	1%	*	4%	1%	*	--	REFUSED

Question 40

How many years has your company been in operation?

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
--	*	--	*	1%	*	*	1%	*	--	LESS THAN 1 YEAR
3%	5%	2%	1%	1%	2%	1%	5%	3%	3%	1-3 YEARS
3%	8%	6%	5%	4%	1%	4%	6%	7%	6%	4-6 YEARS
10%	13%	11%	12%	10%	6%	5%	7%	9%	7%	7-10 YEARS
13%	13%	9%	11%	14%	10%	12%	11%	8%	10%	11-15 YEARS
71%	60%	71%	69%	70%	81%	74%	69%	73%	73%	16 YEARS OR MORE
--	--	*	*	--	*	*	--	--	--	DON'T KNOW
*	--	--	*	1%	--	4%	1%	--	*	REFUSED

Question 41

And, in what year were you born?

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
5%	3%	3%	4%	3%	1%	3%	5%	8%	6%	18 - 34
13%	15%	11%	9%	10%	7%	7%	11%	10%	12%	35 - 44
37%	37%	35%	30%	30%	29%	26%	23%	21%	22%	45 - 54
28%	29%	32%	35%	35%	40%	37%	36%	36%	37%	55 - 64
14%	15%	17%	22%	20%	22%	19%	18%	17%	20%	65 AND ABOVE
2%	2%	3%	1%	2%	1%	8%	6%	8%	3%	REFUSED

Question 42

GENDER

<u>12/08</u>	<u>1/10</u>	<u>1/11</u>	<u>1/12</u>	<u>3/13</u>	<u>3/14</u>	<u>3/15</u>	<u>2/16</u>	<u>3/17</u>	<u>3/18</u>	
76%	83%	86%	84%	84%	86%	81%	80%	76%	76%	MALE
24%	17%	14%	16%	16%	14%	19%	20%	24%	24%	FEMALE