

2019 STATE OF MANUFACTURING SURVEY

Field Dates: March 2019
 Sample Size: N=400 Manufacturing Executives
 N=123 Oversample outside MSP

Question 1

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

<u>2008</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
28%	30%	35%	28%	28%	36%	40%	44%	57%	51%	50%	VERY CONFIDENT
51%	49%	49%	54%	54%	49%	48%	47%	37%	41%	43%	SOMEWHAT CONFIDENT
15%	16%	13%	13%	12%	13%	7%	5%	5%	5%	5%	NOT VERY CONFIDENT
5%	5%	4%	4%	5%	2%	3%	4%	1%	1%	1%	NOT AT ALL CONFIDENT
*	1%	1%	*	*	1%	1%	1%	--	1%	1%	DON'T KNOW/UNSURE
--	--	--	*	*	--	--	--	--	--	1%	REFUSED
79%	78%	83%	82%	82%	84%	89%	90%	94%	93%	93%	TOTAL CONFIDENT
21%	21%	16%	17%	17%	15%	11%	9%	6%	6%	5%	TOTAL NOT CONFIDENT

Question 2

Thinking about the upcoming year, in 2019, do you anticipate economic expansion, a flat economy, or a recession?

<u>2008</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
8%	26%	40%	32%	34%	37%	42%	32%	58%	64%	49%	ECONOMIC EXPANSION
34%	53%	49%	55%	46%	54%	42%	48%	32%	28%	39%	A FLAT ECONOMY
56%	19%	9%	10%	15%	7%	13%	15%	4%	4%	5%	A RECESSION
2%	2%	3%	2%	5%	3%	3%	4%	5%	4%	6%	DON'T KNOW/UNSURE
--	--	--	1%	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>2017</u>	<u>2018</u>	<u>2019</u>	
41%	54%	45%	GOTTEN BETTER
18%	14%	15%	GOTTEN WORSE
39%	32%	37%	STAYED ABOUT THE SAME
3%	1%	2%	DON'T KNOW
--	--	--	REFUSED

Question 4

As you look to 2019, do you project your company's gross revenues to increase or decrease compared to 2018, or will they probably stay the same?

<u>2008</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
11%	29%	30%	25%	25%	23%	25%	25%	35%	36%	29%	INCREASE BY MORE THAN 10%
12%	15%	21%	22%	16%	21%	19%	19%	20%	24%	30%	INCREASE BY LESS THAN 10%
10%	5%	2%	2%	4%	2%	2%	5%	2%	2%	2%	DECREASE BY LESS THAN 10%
22%	10%	5%	6%	6%	5%	4%	6%	5%	3%	4%	DECREASE BY MORE THAN 10%
44%	40%	41%	44%	48%	47%	47%	43%	36%	33%	32%	STAY THE SAME
1%	1%	2%	1%	1%	2%	1%	1%	2%	1%	2%	TOO SOON TO SAY/ DON'T KNOW
*	*	1%	--	1%	1%	*	--	--	--	1%	REFUSED
23%	44%	51%	47%	41%	45%	45%	44%	55%	60%	59%	TOTAL INCREASE
32%	15%	6%	8%	9%	7%	7%	12%	7%	5%	6%	TOTAL DECREASE

Question 5

And, as you look to 2019, do you project your company's profitability to increase or decrease compared to 2018, or will it probably stay the same?

<u>2008</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
9%	21%	21%	17%	16%	18%	14%	20%	27%	27%	23%	INCREASE BY MORE THAN 10%
8%	15%	18%	14%	16%	17%	16%	16%	17%	19%	22%	INCREASE BY LESS THAN 10%
13%	8%	6%	7%	9%	10%	4%	6%	2%	3%	4%	DECREASE BY LESS THAN 10%
21%	10%	5%	6%	8%	7%	5%	6%	5%	4%	5%	DECREASE BY MORE THAN 10%
48%	45%	48%	55%	49%	47%	60%	51%	46%	44%	43%	STAY THE SAME
1%	1%	2%	*	2%	1%	*	*	2%	1%	2%	TOO SOON TO SAY/ DON'T KNOW
--	*	1%	1%	1%	*	*	--	1%	1%	1%	REFUSED
17%	36%	39%	31%	32%	35%	30%	36%	44%	47%	45%	TOTAL INCREASE
34%	17%	11%	13%	17%	17%	9%	12%	7%	7%	9%	TOTAL DECREASE

Question 6

And, as you look to 2019, do you project your company's capital expenditures to increase or decrease compared to 2018, or will they probably stay the same?

2008	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
9%	16%	20%	15%	17%	17%	14%	17%	15%	22%	19%	INCREASE BY MORE THAN 10%
10%	8%	13%	12%	11%	10%	13%	8%	8%	10%	11%	INCREASE BY LESS THAN 10%
12%	9%	6%	11%	6%	4%	6%	8%	4%	5%	6%	DECREASE BY LESS THAN 10%
25%	15%	8%	13%	14%	15%	11%	12%	8%	5%	10%	DECREASE BY MORE THAN 10%
43%	51%	53%	47%	50%	53%	55%	54%	63%	56%	52%	STAY THE SAME
2%	1%	1%	1%	1%	1%	*	2%	2%	1%	1%	TOO SOON TO SAY/ DON'T KNOW
*	==	*	*	1%	1%	*	*	--	--	1%	REFUSED
19%	24%	32%	27%	28%	27%	27%	25%	23%	32%	31%	TOTAL INCREASE
37%	24%	14%	24%	20%	19%	17%	20%	12%	11%	15%	TOTAL DECREASE

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.

	10	8-10	5-7	1-4	Mean
(7) Competition from foreign sources					
2019	6%	13%	22%	64%	3.7
2018	7%	13%	29%	58%	4.0
2017	5%	12%	24%	64%	3.6
2016	6%	17%	20%	62%	3.8
2015	8%	15%	25%	60%	3.9
2014	6%	16%	23%	61%	4.0
2013	7%	17%	26%	56%	4.1
2012	7%	21%	23%	55%	4.4
2011	11%	20%	30%	49%	4.5
2010	12%	27%	24%	48%	4.8
2008	8%	18%	27%	54%	4.2

	<u>10</u>	<u>8-10</u>	<u>5-7</u>	<u>M</u> <u>S</u> <u>1-4</u>	<u>Mean</u>
(8) Government policies and regulations					
2019	20%	40%	40%	19%	6.4
2018	17%	40%	38%	23%	6.3
2017	18%	32%	39%	28%	5.9
2016	24%	41%	33%	25%	6.3
2015	28%	46%	30%	23%	6.7
2014	30%	55%	29%	17%	7.1
2013	32%	58%	24%	18%	7.2
2012	33%	56%	29%	15%	7.3
2011	31%	61%	26%	12%	7.6
2010	38%	57%	25%	16%	7.3

(9) The costs of health care coverage

2019	32%	58%	26%	12%	7.5
2018	31%	60%	25%	14%	7.4
2017	35%	59%	23%	17%	7.3
2016	30%	51%	26%	22%	6.8
2015	34%	56%	24%	20%	7.0
2014	36%	59%	20%	20%	7.2
2013	44%	67%	17%	14%	7.7
2012	36%	68%	17%	13%	7.7
2011	43%	71%	17%	8%	8.2
2010	42%	68%	17%	13%	7.8
2008	36%	64%	21%	13%	7.7

(10) Costs of employee salaries and benefits

2019	11%	29%	46%	22%	5.9
2018	9%	27%	46%	26%	5.7
2017	7%	20%	42%	37%	5.0
2016	6%	19%	41%	39%	4.8
2015	8%	18%	44%	36%	5.0
2014	4%	18%	46%	37%	5.0
2013	7%	19%	45%	34%	5.1
2012	3%	13%	47%	37%	4.9
2011	5%	15%	49%	33%	5.0
2010	6%	16%	46%	34%	5.0
2008	7%	18%	49%	32%	5.3

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

	<u>10</u>	<u>8-10</u>	<u>5-7</u>	<u>M</u> <u>S</u> <u>1-4</u>	<u>Mean</u>
(11) Attracting qualified workers					
2019	21%	46%	33%	19%	6.7
2018	19%	47%	30%	22%	6.5
2017	12%	31%	36%	31%	5.7
2016	10%	32%	33%	34%	5.5
2015	12%	33%	36%	30%	5.7
2014	10%	34%	35%	30%	5.8
2013	9%	30%	32%	35%	5.4
2012	11%	31%	32%	37%	5.5
2011	4%	14%	37%	45%	4.6
2010	8%	19%	27%	51%	4.4
2008	8%	22%	31%	45%	4.8

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

(12) Retaining qualified workers

2019	13%	37%	35%	26%	6.0
2018	15%	36%	33%	30%	5.7

(13) (ASKED SAMPLE A ONLY, N=198) Economic and global uncertainty

2019	6%	16%	48%	34%	5.1
2018	6%	20%	45%	35%	5.1
2017	7%	17%	42%	40%	4.8
2016	11%	29%	38%	32%	5.6
2015	12%	29%	43%	28%	5.8
2014	11%	31%	46%	24%	6.0

(14) (ASKED SAMPLE B ONLY, N=202) Getting your products to market

2019	3%	10%	25%	63%	3.6
2018	6%	15%	30%	54%	4.2
2017	5%	12%	26%	62%	3.8
2016	3%	12%	19%	68%	3.4
2015	5%	14%	27%	58%	4.0

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

(15) Developing future leaders

2019	8%	23%	44%	31%	5.3
2018	8%	25%	40%	34%	5.2
2017	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?

2014	2015	2016	2017	2018	2019	
21%	29%	26%	34%	49%	48%	ATTRACTING AND RETAINING A QUALIFIED WORKFORCE
31%	41%	34%	36%	36%	30%	COST OF HEALTH CARE INSURANCE
29%	20%	15%	18%	34%	28%	INCREASING COSTS OF ENERGY AND MATERIALS FOR YOUR PRODUCTS
48%	43%	40%	38%	18%	19%	UNFAVORABLE BUSINESS CLIMATE
31%	23%	32%	22%	17%	12%	LOWER SALES FOR YOUR PRODUCTS
--	--	--	--	--	3%	REGULATIONS/GOVERNMENT REGULATIONS
--	--	--	--	--	1%	COMPETITION/FOREIGN COMPETITION
3%	4%	3%	3%	2%	3%	OTHER
*	1%	1%	1%	*	2%	DON'T KNOW/NOT SURE
*	*	*	--	--	1%	REFUSED
--	--	2%	--	1%	--	NONE/NONE OF THE ABOVE

Question 17

Thinking ahead, what would you say are the two or three most important drivers of your company's future growth?

2015	2016	2017	2018	2019	
75%	82%	74%	61%	53%	NEW CUSTOMERS/RETAINING CUSTOMERS
--	--	--	38%	36%	MAXIMIZING PRODUCTIVITY
40%	51%	41%	35%	27%	NEW PRODUCTS
--	--	--	--	23%	ELIMINATING TIME AND ENERGY WASTE INSIDE YOUR COMPANY
--	--	--	27%	20%	BETTER STRATEGIC PLANNING AND IMPLEMENTATION
25%	27%	24%	22%	18%	DEVELOPING COMPANY MANAGERS AND LEADERS
--	--	--	--	1%	RETAINING EMPLOYEES
--	--	--	--	1%	GOVERNMENT REGULATIONS/GOVERNMENT
6%	6%	6%	2%	1%	OTHER
1%	5%	3%	1%	2%	DON'T KNOW/NOT SURE
*	*	--	*	1%	REFUSED

Question 18

Looking ahead to 2019, do you plan to increase investment in any of the following areas?

<u>2018</u>	<u>2019</u>	
68%	58%	GROWING REVENUE AND PROFITABILITY
66%	54%	MAXIMIZING PRODUCTIVITY
36%	37%	SYSTEMS AND TECHNOLOGY
33%	37%	STAFF DEVELOPMENT AND CULTURE
36%	32%	EXPANDING WITHIN THE UNITED STATES/NEW CUSTOMERS
12%	13%	EXPANDING GLOBALLY
11%	11%	ISO BUSINESS MANAGEMENT SYSTEMS
*	*	OTHER
9%	11%	NONE OF THE ABOVE
1%	2%	DON'T KNOW/REFUSED

Question 19

Have or will wages for your employees increase for 2019, or will they decrease or stay about the same?

<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
59%	46%	52%	58%	INCREASE
4%	1%	1%	1%	DECREASE
36%	49%	45%	37%	STAY ABOUT THE SAME
1%	3%	1%	2%	DON'T KNOW
--	1%	*	1%	REFUSED

Question 20

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

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
20%	20%	17%	19%	23%	YES
80%	79%	82%	81%	74%	NO
*	1%	1%	1%	2%	DON'T KNOW/UNSURE
*	--	--	*	*	REFUSED

Question 21

(ASKED IF YES, Q20:1, N=92) And, how much of an investment is your company currently making in these leadership training programs? Is it a major investment, a modest investment or just a little investment currently?

- 8% MAJOR INVESTMENT
- 37% MODEST INVESTMENT
- 52% JUST A LITTLE INVESTMENT

- 3% DON'T KNOW
- REFUSED

Question 22

When your company uses automation do you do so because of:

<u>2018</u>	<u>2019</u>	
61%	50%	PRODUCTIVITY
52%	38%	QUALITY OF THE PRODUCT
45%	30%	SAFETY OF THE WORKFORCE
39%	24%	ENHANCING THE WORK ENVIRONMENT
4%	8%	DON'T USE AUTOMATION, BUT AM CONSIDERING IT
22%	25%	DON'T USE AUTOMATION, AND AM NOT CONSIDERING IT
1%	2%	DON'T KNOW/UNSURE
*	1%	REFUSED

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 [INSERT] have on your firm? Would you say a significant impact, some impact, not much of an impact or no impact at all?

	TOTAL IMPACT	TOTAL NO IMPACT	SIGNIF- ICANT IMPACT	SOME IMPACT	NOT MUCH IMPACT	NO IMPACT	DK	REF
23A. The CEO/owner								
2019	86%	12%	68%	18%	6%	6%	1%	1%
2018	84%	14%	71%	13%	8%	6%	2%	--
23B. A member of your management team								
2019	79%	18%	42%	37%	8%	10%	1%	1%
2018	78%	21%	47%	31%	11%	9%	1%	--
23C. A manager or supervisor								
2019	79%	18%	42%	36%	7%	11%	1%	2%
2018	75%	23%	45%	30%	12%	12%	1%	--
23D. A skilled worker								
2019	80%	18%	43%	37%	10%	8%	1%	2%
2018	81%	19%	44%	37%	9%	10%	--	--

Question 24

What is the impact of your inability to attract qualified candidates having on your company growth?

2008	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
18%	14%	17%	22%	22%	29%	27%	26%	26%	24%	22%	VERY DIFFICULT
36%	26%	28%	37%	38%	38%	44%	40%	42%	46%	50%	SOMEWHAT DIFFICULT
22%	24%	25%	26%	19%	19%	13%	16%	15%	15%	14%	NOT TOO DIFFICULT
21%	31%	26%	13%	17%	12%	14%	12%	14%	13%	12%	NOT DIFFICULT AT ALL
1%	1%	2%	1%	3%	1%	2%	4%	3%	2%	2%	DON'T KNOW
1%	4%	3%	2%	1%	*	1%	1%	--	*	1%	REFUSED
55%	40%	45%	58%	60%	67%	71%	67%	68%	70%	71%	TOTAL DIFFICULT
43%	55%	50%	39%	36%	32%	27%	29%	29%	28%	26%	TOTAL NOT DIFFICULT

Question 25

How are you navigating around the worker shortage?

36%	DEVELOPING CURRENT EMPLOYEE SKILLS/OFFERING INCENTIVES
21%	OUTSOURCING THROUGH SUPPLIERS
11%	ACCELERATING AUTOMATION TOOLS
11%	DEPLOYING LEAN PROCESS IMPROVEMENT EFFORTS
1%	OVERTIME/LONGER HOURS
1%	FINDING NEW EMPLOYEES
2%	OTHER
5%	NOTHING/NO SHORTAGE
8%	DON'T KNOW
4%	REFUSED

Question 26

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

2013	2014	2015	2016	2017	2018	2019	
20%	22%	25%	30%	28%	34%	31%	ENTRY LEVEL EMPLOYEES
19%	21%	23%	20%	25%	27%	23%	EMPLOYEES WITH FORMAL TECHNICAL TRAINING
49%	47%	39%	38%	36%	30%	37%	EMPLOYEES WITH ON THE JOB EXPERIENCE
6%	6%	6%	4%	4%	4%	2%	EMPLOYEES WITH FOUR-YEAR COLLEGE DEGREES
4%	1%	4%	4%	3%	1%	1%	OTHER
1%	--	1%	*	2%	*	1%	DEPENDS
1%	1%	1%	3%	2%	1%	3%	DON'T KNOW
1%	1%	*	*	--	*	1%	REFUSED
--	--	--	--	--	3%	1%	NOT APPLICABLE/NOT HIRING

Question 27

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

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
29%	32%	38%	42%	38%	MACHINE OPERATOR
23%	25%	20%	24%	28%	ASSEMBLER/MANUFACTURER/FABRICATOR
9%	9%	9%	8%	7%	WELDER
--	--	7%	5%	4%	FRONT OFFICE OR ADMINISTRATIVE HELP
10%	7%	6%	5%	4%	ENGINEER
4%	4%	2%	2%	2%	SUPERVISOR
--	--	1%	1%	2%	SENIOR LEADERSHIP POSITION
--	--	--	4%	1%	ENTRY LEVEL/GENERAL LABORER/LABORER
--	--	--	3%	1%	TECHNICAL/SKILLED LABORER
--	--	--	--	1%	SALES
--	--	--	3%	1%	NONE/NOT APPLICABLE
22%	17%	14%	1%	3%	OTHER
2%	6%	3%	2%	5%	DON'T KNOW
1%	1%	*	*	2%	REFUSED

Question 28

What are some of the things you are doing to navigate around the worker shortage challenges?

<u>2018</u>	<u>2019</u>	
61%	54%	MAXIMIZING PRODUCTIVITY
--	38%	INCREASING COMPENSATION
33%	32%	TRAINING INTERNS TO BECOME EMPLOYEES/ON-THE-JOB TRAINING
50%	31%	BEING MORE AGGRESSIVE IN MARKETING YOUR COMPANY TO POTENTIAL EMPLOYEES
25%	27%	WORKING DIRECTLY WITH AREA TECH COLLEGES/HIGH SCHOOLS
--	1%	PART TIME/TEMPORARY HELP
7%	4%	NONE/NOT APPLICABLE/NO SHORTAGE OF WORKERS
1%	1%	OTHER
4%	7%	DON'T KNOW
1%	4%	REFUSED

Question 29

When it comes to improving production and efficiency, is it more important for your company to focus on process improvement only, or focus on people development and process improvement equally?

19%	PROCESS IMPROVEMENT ONLY
76%	PEOPLE DEVELOPMENT AND PROCESS IMPROVEMENT EQUALLY
3%	DON'T KNOW
1%	REFUSED

Question 30

In what part of the world do you see greatest increase in prospective business?

2012	2013	2014	2015	2016	2018	2019	
20%	22%	17%	19%	18%	10%	11%	CANADA
22%	19%	12%	13%	7%	21%	11%	CHINA
10%	9%	13%	8%	10%	8%	8%	EUROPE
--	--	7%	6%	5%	8%	5%	MEXICO
6%	4%	2%	3%	3%	6%	4%	INDIA
10%	13%	5%	4%	3%	4%	4%	SOUTH AMERICA
			--	--	--	3%	NORTH AMERICA
1%	--	10%	8%	--	3%	1%	ASIA (NON SPECIFIC)
--	--	4%	--	--	15%	19%	UNITED STATES/USA
1%	2%	1%	10%	4%	1%	2%	SOME OTHER PLACE
14%	19%	17%	21%	28%	10%	19%	NONE OF THE ABOVE
10%	10%	12%	9%	6%	13%	13%	DON'T KNOW/NOT SURE
2%	1%	1%	1%	1%	*	*	REFUSED

Question 31

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

2015	2016	2017	2018	2019	
39%	38%	54%	53%	49%	YES
59%	61%	45%	47%	49%	NO
1%	1%	1%	--	1%	DON'T KNOW/NOT SURE
*	*	*	*	1%	REFUSED

Question 32

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?

- We have a 1 to 3 year written plan and all staff know their roles and actions to achieve the plan.
- We have a written plan, but that needs to be further communicated with staff
- Our company has some ideas, but has not yet worked through what our primary focus is, and is not.
- The strategy is strictly the role of the CEO.

<u>2018</u>	<u>2019</u>	
27%	28%	WRITTEN PLAN/STAFF KNOW THEIR ROLES
18%	15%	WRITTEN PLAN/NEEDS TO BE COMMUNICATED
20%	16%	NOT YET WORKED THROUGH
28%	32%	STRICTLY ROLE OF CEO
1%	1%	OTHER
3%	4%	DON'T KNOW/NOT SURE
--	2%	REFUSED
2%	1%	NONE/NO PLANS

Question 33

How many people does your company employ in all its facilities in Minnesota?

2008	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
86%	89%	83%	60%	61%	47%	55%	55%	58%	53%	51%	UNDER 10
--	--	--	15%	13%	21%	14%	15%	14%	18%	20%	11-25
--	--	--	11%	11%	12%	9%	10%	8%	10%	9%	26-50
7%	7%	9%	5%	5%	8%	5%	7%	10%	12%	9%	51-100
--	--	--	4%	2%	3%	5%	2%	5%	3%	6%	101-150
2%	2%	2%	1%	3%	3%	2%	2%	1%	2%	1%	151 TO 250
4%	2%	6%	3%	4%	5%	4%	2%	3%	3%	4%	MORE THAN 250
1%	--	--	--	*	1%	*	6%	*	--	--	DON'T KNOW/NOT SURE
*	--	*	1%	1%	*	5%	2%	1%	*	*	REFUSED
86%	89%	83%	86%	85%	80%	79%	80%	80%	80%	80%	UNDER 50
7%	7%	9%	9%	7%	11%	10%	9%	15%	15%	15%	51-150
6%	4%	8%	4%	6%	8%	6%	3%	4%	5%	5%	151+

Question 34

What are your annual business revenues? Just stop me when I get to the category that includes your company's total annual revenues.

2008	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
47%	56%	46%	50%	50%	38%	42%	47%	44%	45%	42%	UNDER \$1 MILLION
31%	23%	25%	22%	22%	26%	23%	25%	23%	24%	27%	MORE THAN \$1M TO \$5M
6%	6%	7%	7%	5%	12%	6%	8%	6%	7%	9%	MORE THAN \$5M TO \$10M
5%	5%	6%	5%	3%	7%	5%	5%	6%	6%	7%	MORE THAN \$10M TO \$20M
7%	6%	11%	8%	10%	10%	10%	5%	7%	9%	10%	MORE THAN \$20M
5%	5%	7%	8%	9%	6%	14%	9%	13%	8%	6%	DON'T KNOW/NOT SURE/REFUSED
47%	56%	46%	50%	50%	38%	42%	47%	44%	45%	42%	UNDER \$1 MILLION
49%	39%	48%	42%	40%	55%	44%	44%	43%	47%	52%	\$1 MILLION OR MORE

Question 35

Which one of the following best describes your company's primary business?

<u>2008</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
37%	29%	22%	17%	26%	25%	18%	26%	12%	18%	24%	PRECISION MANUFACTURING
16%	14%	16%	30%	13%	13%	14%	19%	14%	16%	23%	PROCESS MANUFACTURING
13%	16%	15%	13%	14%	17%	20%	17%	20%	16%	15%	METAL FABRICATION
12%	15%	13%	10%	12%	30%	14%	18%	11%	10%	12%	AN ORIGINAL EQUIPMENT MANUFACTURER, OEM
4%	5%	7%	6%	4%	5%	5%	4%	5%	7%	5%	PLASTICS
4%	3%	6%	5%	1%	5%	3%	4%	3%	4%	4%	PRINTING
--	--	--	--	--	--	--	--	--	5%	4%	ELECTRONICS COMPONENTS
--	--	--	--	--	--	--	--	--	7%	3%	WOODWORKING/WOOD MANUFACTURING
--	--	--	--	--	--	--	--	--	7%	2%	TEXTILE MANUFACTURING
--	--	--	--	--	--	3%	--	--	2%	2%	CABINET MANUFACTURING/CUSTOM CABINETS
3%	2%	3%	2%	--	2%	1%	2%	2%	1%	1%	INFORMATION TECHNOLOGY, IT
--	--	--	--	--	--	*	--	--	3%	1%	FOOD MANUFACTURING
--	--	--	--	--	--	--	--	--	--	1%	AUTOMOTIVE
--	--	--	--	--	--	--	--	--	1%	1%	ANIMAL/AGRICULTURAL MANUFACTURING
--	--	--	--	--	--	--	--	--	--	1%	RECYCLING
--	1%	3%	3%	7%	4%	17%	8%	31%	3%	3%	SOMETHING ELSE
1%	--	*	--	1%	--	*	1%	--	--	--	DON'T KNOW
*	1%	*	1%	1%	*	4%	1%	*	--	--	REFUSED

Question 36

How many years has your company been in operation?

<u>2008</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
--	*	--	*	1%	*	*	1%	*	--	--	LESS THAN 1 YEAR
3%	5%	2%	1%	1%	2%	1%	5%	3%	3%	2%	1 - 3 YEARS
3%	8%	6%	5%	4%	1%	4%	6%	7%	6%	4%	4 - 6 YEARS
10%	13%	11%	12%	10%	6%	5%	7%	9%	7%	10%	7 - 10 YEARS
13%	13%	9%	11%	14%	10%	12%	11%	8%	10%	9%	11 - 15 YEARS
71%	60%	71%	69%	70%	81%	74%	69%	73%	73%	75%	16 YEARS OR MORE
--	--	*	*	--	*	*	--	--	--	--	DON'T KNOW
*	--	--	*	1%	--	4%	1%	--	*	*	REFUSED
29%	39%	28%	29%	30%	19%	22%	30%	27%	27%	25%	TOTAL LESS THAN 15 YEARS
71%	60%	71%	69%	70%	81%	74%	69%	73%	73%	75%	16 YEARS OR MORE

Question 37

In what year were you born?

<u>2008</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
5%	3%	3%	4%	3%	1%	3%	5%	8%	6%	6%	18 - 34
13%	15%	11%	9%	10%	7%	7%	11%	10%	12%	10%	35 - 44
37%	37%	35%	30%	30%	29%	26%	23%	21%	22%	20%	45 - 54
28%	29%	32%	35%	35%	40%	37%	37%	36%	37%	39%	55 - 64
14%	15%	17%	22%	20%	22%	19%	18%	17%	20%	22%	65 AND ABOVE
2%	2%	3%	1%	2%	1%	8%	6%	8%	3%	4%	REFUSED

Question 38

Gender.

<u>2008</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
76%	83%	86%	84%	84%	86%	81%	80%	76%	76%	80%	MALE
24%	17%	14%	16%	16%	14%	19%	20%	24%	24%	20%	FEMALE

Question C

What is your job title?

<u>2008</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	
38%	50%	43%	42%	41%	40%	40%	40%	40%	38%	39%	OWNER
29%	30%	33%	31%	28%	36%	33%	28%	22%	22%	27%	PRESIDENT/CEO/CFO/COO
16%	9%	13%	17%	12%	14%	9%	13%	20%	27%	19%	MANAGER/GM
2%	*	2%	1%	*	*	3%	2%	4%	4%	8%	MANAGEMENT TEAM MEMBER
2%	*	*	*	*	*	2%	*	*	4%	3%	GENERAL OFFICE/HR STAFF
7%	6%	5%	4%	11%	7%	10%	*	*	3%	1%	VICE PRESIDENT
6%	5%	5%	4%	7%	3%	3%	17%	15%	2%	2%	OTHER