



## 2021 STATE OF MANUFACTURING FALL SURVEY

Field Dates: September 8-October 5, 2021  
 Sample Size: N=400 Manufacturing Executives

### Question 1

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

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
40%	44%	57%	51%	50%	49%	43%	45%	VERY CONFIDENT
48%	47%	37%	41%	43%	40%	42%	42%	SOMEWHAT CONFIDENT
7%	5%	5%	5%	5%	7%	10%	9%	NOT VERY CONFIDENT
3%	4%	1%	1%	1%	3%	3%	3%	NOT AT ALL CONFIDENT
1%	1%	--	1%	1%	1%	1%	*	DON'T KNOW/UNSURE
--	--	--	--	1%	*	*	1%	REFUSED
<b>89%</b>	<b>90%</b>	<b>94%</b>	<b>93%</b>	<b>93%</b>	<b>89%</b>	<b>85%</b>	<b>87%</b>	<b>TOTAL CONFIDENT</b>
<b>11%</b>	<b>9%</b>	<b>6%</b>	<b>6%</b>	<b>5%</b>	<b>10%</b>	<b>14%</b>	<b>12%</b>	<b>TOTAL NOT CONFIDENT</b>

### Question 2

And, even though we only have a few months left, as you think about 2021 as whole, do you think this year will be one of economic expansion, a flat economy, or a recession?

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
42%	32%	58%	64%	49%	27%	20%	35%	ECONOMIC EXPANSION
42%	48%	32%	28%	39%	39%	40%	44%	FLAT ECONOMY
13%	15%	4%	4%	5%	24%	36%	18%	RECESSION
3%	4%	5%	4%	6%	8%	4%	3%	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>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
41%	54%	45%	48%	27%	20%	GOTTEN BETTER
18%	14%	15%	19%	35%	46%	GOTTEN WORSE
39%	32%	37%	30%	35%	32%	STAYED ABOUT THE SAME
3%	1%	2%	3%	2%	2%	DON'T KNOW
--	--	--	*	1%	*	REFUSED

**Question 4**

Overall, what impact would do you think the COVID-19 outbreak has had on the state's economy and business climate, if any at all?

<u>9/20</u>	<u>9/21</u>	
66%	68%	MAJOR IMPACT
26%	26%	MODEST IMPACT
5%	5%	MINOR IMPACT
2%	1%	NO IMPACT AT ALL
1%	1%	DON'T KNOW/NOT SURE
1%	*	REFUSED
<b>92%</b>	<b>93%</b>	<b>TOTAL MAJOR/MODEST IMPACT</b>
<b>6%</b>	<b>6%</b>	<b>TOTAL MINOR/NO IMPACT</b>



**Question 5**

As you look to the year-end, do you project your company's gross revenues for 2021 to increase or decrease compared to 2020, or will they probably stay the same?

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
25%	25%	35%	36%	29%	24%	17%	37%	INCREASE BY MORE THAN 10%
19%	19%	20%	24%	30%	20%	5%	14%	INCREASE BY LESS THAN 10%
2%	5%	2%	2%	2%	3%	9%	5%	DECREASE BY LESS THAN 10%
4%	6%	5%	3%	4%	10%	39%	13%	DECREASE BY MORE THAN 10%
47%	43%	36%	33%	32%	40%	29%	30%	STAY THE SAME
1%	1%	2%	1%	2%	3%	1%	1%	TOO SOON TO SAY/DON'T KNOW
*	--	--	--	1%	*	1%	1%	REFUSED
22%	21%	20%	16%	12%	20%	11%	8%	STATUS QUO 3/3
<b>45%</b>	<b>44%</b>	<b>55%</b>	<b>60%</b>	<b>59%</b>	<b>44%</b>	<b>21%</b>	<b>51%</b>	<b>TOTAL INCREASE</b>
<b>7%</b>	<b>12%</b>	<b>7%</b>	<b>5%</b>	<b>6%</b>	<b>13%</b>	<b>48%</b>	<b>18%</b>	<b>TOTAL DECREASE</b>

**Question 6**

And, as you look to the year-end, do you project your company's profitability for 2021 to increase or decrease compared to 2020, or will it probably stay the same?

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
14%	20%	27%	27%	23%	21%	14%	27%	INCREASE BY MORE THAN 10%
16%	16%	17%	19%	22%	17%	10%	14%	INCREASE BY LESS THAN 10%
4%	6%	2%	3%	4%	3%	8%	9%	DECREASE BY LESS THAN 10%
5%	6%	5%	4%	5%	9%	33%	12%	DECREASE BY MORE THAN 10%
60%	51%	46%	44%	43%	47%	34%	36%	STAY THE SAME
*	*	2%	1%	2%	2%	1%	*	TOO SOON TO SAY/DON'T KNOW
*	--	1%	1%	1%	*	1%	2%	REFUSED
<b>30%</b>	<b>36%</b>	<b>44%</b>	<b>47%</b>	<b>45%</b>	<b>38%</b>	<b>24%</b>	<b>41%</b>	<b>TOTAL INCREASE</b>
<b>9%</b>	<b>12%</b>	<b>7%</b>	<b>7%</b>	<b>9%</b>	<b>13%</b>	<b>41%</b>	<b>21%</b>	<b>TOTAL DECREASE</b>



*Question 7*

And, as you look to the year-end, do you project your company's capital expenditures for 2021 to increase or decrease compared to 2020, or will they probably stay the same?

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
14%	17%	15%	22%	19%	15%	17%	32%	INCREASE BY MORE THAN 10%
13%	8%	8%	10%	11%	11%	8%	12%	INCREASE BY LESS THAN 10%
6%	8%	4%	5%	6%	7%	10%	4%	DECREASE BY LESS THAN 10%
11%	12%	8%	5%	10%	12%	24%	11%	DECREASE BY MORE THAN 10%
55%	54%	63%	56%	52%	54%	40%	41%	STAY THE SAME
*	2%	2%	1%	1%	2%	2%	1%	TOO SOON TO SAY/DON'T KNOW
*	*	--	--	1%	*	*	*	REFUSED
<b>27%</b>	<b>25%</b>	<b>23%</b>	<b>32%</b>	<b>31%</b>	<b>26%</b>	<b>25%</b>	<b>44%</b>	<b>TOTAL INCREASE</b>
<b>17%</b>	<b>20%</b>	<b>12%</b>	<b>11%</b>	<b>15%</b>	<b>19%</b>	<b>33%</b>	<b>14%</b>	<b>TOTAL DECREASE</b>



**Questions 8-18**

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.

	<b>10</b>	<b>8-10</b>	<b>5-7</b>	<b>1-4</b>	<b>MEAN</b>
<b>(8)</b> Federal government programs resulting from the pandemic					
<b>9/21</b>	21%	35%	36%	27%	<b>6.1</b>
<b>9/20</b>	14%	27%	39%	31%	<b>5.5</b>
<b>(9)</b> State government programs resulting from the pandemic					
<b>9/21</b>	19%	32%	39%	27%	<b>5.9</b>
<b>9/20</b>	16%	26%	39%	30%	<b>5.5</b>
<b>(10)</b> The costs of health care coverage					
<b>9/21</b>	26%	50%	33%	15%	<b>7.0</b>
<b>9/20</b>	25%	50%	30%	18%	<b>6.9</b>
<b>3/20</b>	27%	50%	29%	20%	<b>6.9</b>
<b>4/19</b>	32%	58%	26%	12%	<b>7.5</b>
<b>3/18</b>	31%	60%	25%	14%	<b>7.4</b>
<b>2017</b>	35%	59%	23%	17%	<b>7.2</b>
<b>2016</b>	30%	51%	25%	22%	<b>6.8</b>
<b>2015</b>	34%	56%	24%	20%	<b>7.0</b>
<b>(11)</b> Costs of employee salaries and benefits					
<b>9/21</b>	19%	46%	36%	17%	<b>6.7</b>
<b>9/20</b>	9%	24%	46%	28%	<b>5.5</b>
<b>3/20</b>	8%	23%	45%	28%	<b>5.6</b>
<b>4/19</b>	11%	29%	46%	22%	<b>5.9</b>
<b>3/18</b>	9%	27%	46%	26%	<b>5.7</b>
<b>2017</b>	7%	20%	42%	37%	<b>5.0</b>
<b>2016</b>	6%	19%	41%	39%	<b>4.8</b>
<b>2015</b>	8%	18%	44%	36%	<b>5.0</b>
<b>(12)</b> Attracting qualified workers					
<b>9/21</b>	35%	61%	23%	15%	<b>7.4</b>
<b>9/20</b>	20%	36%	34%	27%	<b>6.1</b>
<b>3/20</b>	14%	40%	31%	27%	<b>6.1</b>
<b>4/19</b>	21%	46%	33%	19%	<b>6.7</b>
<b>3/18</b>	19%	47%	30%	22%	<b>6.5</b>
<b>2017</b>	12%	31%	36%	31%	<b>5.7</b>
<b>2016</b>	10%	32%	33%	34%	<b>5.5</b>
<b>2015</b>	12%	33%	36%	30%	<b>5.7</b>

*(Continued...)*



	10	8-10	5-7	1-4	MEAN
<b>(13)</b> Retaining qualified workers					
9/21	24%	49%	28%	22%	6.7
9/20	15%	36%	34%	29%	5.9
3/20	12%	33%	30%	35%	5.5
4/19	13%	37%	35%	26%	6.0
3/18	15%	36%	33%	30%	5.8
2017	12%	31%	36%	31%	5.7
2016	10%	32%	33%	34%	5.5
2015	12%	33%	36%	30%	5.7
<b>(14)</b> Economic and global uncertainty (SAMPLE A ONLY)					
9/21	22%	40%	47%	13%	6.9
9/20	21%	39%	46%	14%	6.6
3/20	20%	40%	39%	20%	6.5
4/19	6%	16%	48%	34%	5.1
3/18	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
<b>(15)</b> Getting your products to market (SAMPLE B ONLY)					
9/21	8%	20%	39%	39%	4.9
9/20	8%	15%	29%	54%	4.1
3/20	3%	11%	31%	56%	4.0
4/19	3%	10%	25%	63%	3.6
3/18	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
<b>(16)</b> Developing future leaders					
9/21	16%	30%	45%	23%	6.0
9/20	11%	28%	43%	28%	5.6
3/20	8%	23%	43%	31%	5.2
4/19	8%	23%	44%	31%	5.3
3/18	8%	25%	40%	34%	5.2
2017	12%	26%	38%	35%	5.3
2016	6%	12%	27%	60%	3.7
2015	4%	13%	32%	54%	3.9
<b>(17)</b> Data breaches and cyber security					
9/21	10%	25%	43%	32%	5.5
9/20	11%	30%	37%	32%	5.6
3/20	9%	24%	39%	37%	5.2
<b>(18)</b> Supply chain issues					
9/21	36%	67%	24%	8%	8.0



**Question 19**

What would you say are the one or two biggest challenges your company is facing that might negatively impact future growth?

*Combined Choices*

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
29%	26%	34%	49%	48%	40%	32%	50%	ATTRACTING AND RETAINING A QUALIFIED WORKFORCE
20%	15%	18%	34%	28%	24%	20%	48%	INCREASING COSTS OF MATERIALS FOR YOUR PRODUCTS^
--	--	--	--	--	--	--	19%	INFLATION
--	--	--	--	--	--	--	16%	INCREASING COSTS OF WAGES
43%	40%	38%	18%	19%	33%	33%	10%	UNFAVORABLE BUSINESS CLIMATE/ECONOMY
41%	34%	36%	36%	30%	31%	26%	9%	COST OF HEALTH CARE INSURANCE
--	--	--	--	--	--	19%	5%	GETTING OPERATIONS UP AND RUNNING/BACK TO NORMAL
--	--	--	--	--	--	--	3%	INCREASING COSTS OF ENERGY
--	--	--	--	--	8%	9%	3%	LACK OF CLEAR DIRECTION/PATH FORWARD
--	--	--	--	3%	2%	2%	2%	REGULATIONS/GOVERNMENT REGULATIONS
--	--	--	--	--	2%	*	1%	COVID-19
4%	3%	3%	2%	3%	1%	3%	1%	OTHER
--	2%	--	1%	--	*	1%	5%	NONE/NONE OF THE ABOVE
1%	1%	1%	*	2%	2%	1%	2%	DON'T KNOW/NOT SURE
*	*	--	--	1%	*	--	--	REFUSED

*^NOTE: Previous wording was Increasing costs of energy and materials for your products*



*Question 20*

Is your company currently having capacity challenges? Would you say your issues are mostly related to workforce, suppliers/materials, equipment/production, shipping/logistics, customers, or something else?

- 39% NOT HAVING CHALLENGES
  
- 36% WORKFORCE ISSUES
- 33% SUPPLIERS/MATERIALS ISSUES
- 11% SHIPPING/LOGISTICS ISSUES
- 4% CUSTOMER ISSUES
- 3% EQUIPMENT/PRODUCTION ISSUES
- 1% SOMETHING ELSE
- 1% DON'T KNOW/NOT SURE
- \* REFUSED
  
- 59% TOTAL YES, HAVING CHALLENGES**
- 39% NO, NOT HAVING CHALLENGES**

*Question 21C*

Is your company currently instituting or planning to institute additional safety measures and changes in production practices as a result of the COVID-19 pandemic and the surge caused by the Delta variant?

*Combined Choices*

- 69% NO ADDITIONAL MEASURES BEING TAKEN
  
- 13% REQUIRING MASKS FOR UNVACCINATED EMPLOYEES
- 12% REQUIRING MASKS FOR ALL EMPLOYEES
- 8% REQUIRING EMPLOYEES TO GET THE CORONAVIRUS VACCINE
- 6% OFFERING INCENTIVES TO EMPLOYEES WHO GET THE CORONAVIRUS VACCINES
- 3% CDC GUIDELINES/INCREASED CLEANING
- 3% SOCIAL DISTANCING/LIMITING CONTACT
- 1% SOMETHING ELSE
- 2% DON'T KNOW/NOT SURE
- 3% REFUSED
  
- 27% TOTAL YES, TAKING ADDITIONAL MEASURES**
- 69% NO ADDITIONAL MEASURES BEING TAKEN**





*Question 22*

Overall, what type of impact would you say the COVID-19 outbreak has had on your business? Which statement below would you say you agree with more?

The COVID-19 pandemic has had more of a short-term impact on my business, and I expect things to get back to normal soon.

...or...

The COVID-19 pandemic has had long-term lasting effects on my business, and I expect I will need to adjust to a new normal for a while.

- 48% SHORT-TERM IMPACT
- 48% LONG-TERM LASTING EFFECTS
- 1% BOTH
- 2% NEITHER
- \* DON'T KNOW/NOT SURE
- \* REFUSED



**Question 23**

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

*Combined Choices*

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
--	--	--	--	--	--	--	50%	HIRING NEW EMPLOYEES
75%	82%	74%	61%	53%	57%	59%	38%	NEW CUSTOMERS AND MARKETS/RETAINING CUSTOMERS
25%	27%	24%	22%	18%	14%	15%	19%	DEVELOPING MANAGERS AND LEADERS
--	--	--	38%	49%	45%	27%	18%	INCREASING PRODUCTIVITY
40%	51%	41%	35%	27%	26%	24%	18%	NEW PRODUCTS
--	--	--	--	--	--	--	18%	IMPLEMENTING AND USING AUTOMATION
--	--	--	27%	20%	22%	16%	14%	EFFECTIVE STRATEGIC PLANNING AND IMPLEMENTATION
--	--	--	--	--	--	--	1%	GETTING RAW MATERIALS/SUPPLY CHAIN
--	--	--	--	--	--	2%	1%	GOVERNMENT REGULATIONS/GOVERNMENT
--	--	--	--	--	2%	1%	*	ECONOMY/ECONOMIC CONCERNS
6%	6%	6%	2%	1%	2%	3%	1%	OTHER
1%	5%	3%	1%	2%	2%	3%	2%	DON'T KNOW/NOT SURE/NONE
*	*	--	*	1%	--	2%	*	REFUSED



**Question 24**

For the entire year of 2021, do you expect an increase investment in any of the following areas?

<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
57%	58%	62%	51%	68%	GROWING REVENUE AND PROFITABILITY
55%	54%	62%	44%	63%	MAXIMIZING PRODUCTIVITY
30%	32%	37%	48%	53%	EXPANDING SALES WITHIN THE UNITED STATES
27%	37%	33%	29%	44%	STAFF DEVELOPMENT AND CULTURE
30%	37%	38%	30%	38%	SYSTEMS, TECHNOLOGY AND AUTOMATION
--	--	28%	24%	30%	DATA PROTECTION AND CYBER SECURITY
10%	13%	11%	10%	15%	EXPANDING SALES GLOBALLY
*	*	*	--	1%	OTHER
8%	11%	9%	14%	7%	NONE OF THE ABOVE
1%	2%	1%	1%	--	DON'T KNOW/REFUSED

**Question 25**

Does your company currently have positions that are open and are hiring?

- 62% YES
- 38% NO
- \* DON'T KNOW/NOT SURE
- \* REFUSED

**Question 26**

Overall, how difficult do you think it is to attract qualified candidates to manufacturers like you?

- 55% VERY DIFFICULT
- 32% SOMEWHAT DIFFICULT
- 7% NOT TOO DIFFICULT
- 4% NOT DIFFICULT AT ALL
- 1% DON'T KNOW
- \* REFUSED
  
- 87% TOTAL DIFFICULT**
- 12% TOTAL NOT DIFFICULT**



**Question 27**

When thinking about attracting and hiring new employees, what does your company want to be known for?

<u>3/20</u>	<u>9/20</u>	<u>9/21<sup>^</sup></u>	
35%	29%	69%	GREAT WORK ENVIRONMENT
11%	8%	61%	COMPETITIVE SALARY
12%	15%	58%	WORK-LIFE BALANCE
--	5%	57%	SAFE WORK ENVIRONMENT
7%	3%	47%	FLEXIBLE SHIFTS AND WORK SCHEDULES
5%	5%	45%	CAREER GROWTH
5%	3%	45%	GREAT BENEFITS
13%	15%	42%	INDUSTRY LEADER
--	4%	2%	OTHER
5%	1%	2%	DON'T KNOW
1%	2%	*	REFUSED

*<sup>^</sup>Note: Sept 2021 now allowing multiple responses*

**Question 28**

On a different topic, does your company have a succession plan?

<u>2017</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
50%	42%	49%	43%	YES
48%	54%	45%	50%	NO
2%	4%	6%	6%	DON'T KNOW/NOT SURE
*	*	*	1%	REFUSED

**Question 29**

Does your company have a formal strategic plan for profitable growth?

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/21</u>	
39%	38%	54%	53%	49%	52%	55%	YES
59%	61%	45%	47%	49%	44%	41%	NO
1%	1%	1%	--	1%	3%	4%	DON'T KNOW/NOT SURE
*	*	*	*	1%	*	--	REFUSED



*Question 30*

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?

<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/21</u>	
27%	28%	28%	31%	WE HAVE A 1 TO 3 YEAR WRITTEN PLAN AND ALL STAFF KNOW THEIR ROLES AND ACTIONS TO ACHIEVE THE PLAN
18%	15%	11%	14%	WE HAVE A WRITTEN PLAN, BUT THAT NEEDS TO BE FURTHER COMMUNICATED WITH STAFF
20%	16%	19%	22%	OUR COMPANY HAS SOME IDEAS, BUT HAS NOT YET WORKED THROUGH WHAT OUR PRIMARY FOCUS IS, AND IS NOT
28%	32%	33%	26%	THE STRATEGY IS STRICTLY THE ROLE OF THE CEO
2%	1%	1%	1%	DON'T HAVE A PLAN
1%	1%	2%	2%	OTHER
3%	4%	5%	4%	DON'T KNOW/NOT SURE
--	2%	*	*	REFUSED

*Question 31*

On a different topic, has your company been hacked or experienced a data breach of some kind?

- 15% YES
- 84% NO
- 1% DON'T KNOW/NOT SURE
- \* REFUSED

*Question 32*

How confident are you that your company is secure from hacking, data breaches, and other technological threats?

- 28% VERY CONFIDENT
- 56% SOMEWHAT CONFIDENT
- 9% NOT THAT CONFIDENT
- 5% NOT AT ALL CONFIDENT
- 1% DON'T KNOW/NOT SURE
- \* REFUSED

- 84% TOTAL CONFIDENT**
- 14% TOTAL NOT CONFIDENT**



*Question 33*

Please tell us which quality/business management systems you are CERTIFIED to.

- 22% ISO 9001:2015 [STANDARD]
- 4% ISO 14001:2015 [ENVIRONMENTAL]
- 4% EOS
- 4% ISO 13485:2016 [MEDICAL]
- 3% IATF 16949:2016 [AUTOMOTIVE]
- 2% AS 9100D:2016 [AEROSPACE]
- 3% OTHER
- 61% NONE
- 7% DON'T KNOW/NOT SURE
- \* REFUSED

*Question 34*

**(ASKED IF YES, Q33, N=117)** Why have you implemented a quality/business management system?

Please choose the top one or two reasons.

- 39% TO IMPROVE QUALITY
- 35% CUSTOMER REQUIRED IT
- 35% IMPROVE PROCESSES AND PERFORMANCE
- 21% STRUCTURE AND CONTROL FOR GROWTH
- 17% DIFFERENTIATION AND COMPETITIVE ADVANTAGE
- 11% RETAIN AND DEVELOP ORGANIZATIONAL KNOWLEDGE
- 1% OTHER
- 1% DON'T KNOW/NOT SURE
- REFUSED



**Question 35**

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

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
55%	55%	58%	53%	51%	61%	55%	49%	UNDER 10
14%	15%	14%	18%	20%	14%	18%	20%	11-25
9%	10%	8%	10%	9%	6%	7%	11%	26-50
5%	7%	10%	12%	9%	8%	12%	10%	51-100
5%	2%	5%	3%	6%	7%	3%	5%	101-150
2%	2%	1%	2%	1%	1%	1%	1%	151 TO 250
4%	2%	3%	3%	4%	4%	4%	4%	MORE THAN 250
*	6%	*	--	--	--	--	--	DON'T KNOW/NOT SURE
5%	2%	1%	*	*	--	*	*	REFUSED
<b>79%</b>	<b>80%</b>	<b>80%</b>	<b>80%</b>	<b>80%</b>	<b>80%</b>	<b>80%</b>	<b>80%</b>	<b>TOTAL UNDER 50</b>
<b>10%</b>	<b>9%</b>	<b>15%</b>	<b>15%</b>	<b>15%</b>	<b>15%</b>	<b>15%</b>	<b>15%</b>	<b>TOTAL 51-150</b>
<b>6%</b>	<b>3%</b>	<b>4%</b>	<b>5%</b>	<b>5%</b>	<b>5%</b>	<b>5%</b>	<b>5%</b>	<b>TOTAL 151+</b>

**Question 36**

What are your annual business revenues?

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
42%	47%	44%	45%	42%	47%	44%	37%	UNDER \$1 MILLION
23%	25%	23%	24%	27%	24%	22%	28%	\$1M - \$5 MILLION
6%	8%	6%	7%	9%	3%	5%	11%	\$5M - \$10 MILLION
5%	5%	6%	6%	7%	9%	10%	8%	\$10M - \$20 MILLION
10%	5%	7%	9%	10%	10%	10%	10%	\$20M MILLION
14%	9%	13%	8%	6%	7%	9%	6%	DON'T KNOW/NOT SURE/REFUSED
<b>42%</b>	<b>47%</b>	<b>44%</b>	<b>45%</b>	<b>42%</b>	<b>47%</b>	<b>44%</b>	<b>37%</b>	<b>UNDER \$1 MILLION</b>
<b>44%</b>	<b>44%</b>	<b>43%</b>	<b>47%</b>	<b>52%</b>	<b>46%</b>	<b>47%</b>	<b>57%</b>	<b>TOTAL \$1MILL+</b>
<b>21%</b>	<b>19%</b>	<b>20%</b>	<b>23%</b>	<b>25%</b>	<b>22%</b>	<b>25%</b>	<b>29%</b>	<b>\$5 MILL+</b>



**Question 37**

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

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
14%	19%	14%	16%	23%	13%	25%	17%	PROCESS MANUFACTURING
18%	26%	12%	18%	24%	16%	14%	17%	PRECISION MANUFACTURING
20%	17%	20%	16%	15%	14%	12%	14%	METAL FABRICATION
14%	18%	11%	10%	12%	9%	6%	8%	AN ORIGINAL EQUIPMENT MANUFACTURER, OEM
5%	4%	5%	7%	5%	5%	3%	5%	PLASTICS
--	--	--	5%	4%	5%	6%	5%	PRINTING
--	--	--	--	--	2%	6%	4%	RETAIL/RETAIL SALES
--	--	--	7%	3%	2%	2%	3%	WOODWORKING/WOOD MANUFACTURING
*	--	--	3%	1%	4%	3%	3%	FOOD MANUFACTURING/FOOD AND BEVERAGE INDUSTRY
--	--	--	--	--	2%	4%	3%	CONSTRUCTION
--	--	--	--	1%	*	2%	2%	AUTOMOTIVE
--	--	--	--	--	--	--	2%	MEDICAL MANUFACTURING
3%	4%	3%	4%	4%	3%	2%	2%	ELECTRONICS COMPONENTS
--	--	--	1%	1%	1%	2%	2%	ANIMAL/AGRICULTURAL MANUFACTURING
--	--	--	--	--	--	--	1%	DISTRIBUTION
--	--	--	7%	2%	2%	1%	1%	TEXTILE MANUFACTURING/EMBROIDERY/APPAREL
--	--	--	--	--	--	--	1%	PAINTING/COATING
--	--	--	--	--	--	1%	1%	CONSULTING
--	--	--	--	--	--	1%	*	GRAPHIC DESIGN/ART
--	--	--	--	--	--	1%	*	REPAIRS/MAINTENANCE
--	--	--	--	--	--	2%	*	SERVICE/HOSPITALITY
--	--	--	--	--	1%	2%	*	SIGN MANUFACTURING
1%	2%	2%	1%	1%	2%	*	--	INFORMATION TECHNOLOGY, IT
3%	--	--	2%	2%	2%	3%	--	CABINET MANUFACTURING/CUSTOM CABINETS
--	--	--	--	1%	--	*	--	RECYCLING
17%	8%	31%	3%	3%	17%	4%	5%	SOMETHING ELSE
*	1%	--	--	--	*	*	--	DON'T KNOW
4%	1%	*	--	--	--	*	*	REFUSED





**Question 38**

How many years has your company been in operation?

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
*	1%	*	--	--	*	*	1%	LESS THAN 1 YEAR
1%	5%	3%	3%	2%	3%	3%	1%	1 - 3 YEARS
4%	6%	7%	6%	4%	5%	4%	3%	4 - 6 YEARS
5%	7%	9%	7%	10%	11%	7%	10%	7 - 10 YEARS
12%	11%	8%	10%	9%	8%	8%	10%	11 - 15 YEARS
74%	69%	73%	73%	75%	73%	77%	75%	16 YEARS OR MORE
*	--	--	--	--	*	--	--	DON'T KNOW
4%	1%	--	*	*	--	*	--	REFUSED
<b>22%</b>	<b>30%</b>	<b>27%</b>	<b>27%</b>	<b>25%</b>	<b>27%</b>	<b>23%</b>	<b>25%</b>	<b>TOTAL &lt;16 YEARS</b>
<b>74%</b>	<b>69%</b>	<b>73%</b>	<b>73%</b>	<b>75%</b>	<b>73%</b>	<b>77%</b>	<b>75%</b>	<b>16 YEARS+</b>

**Question 39**

In what year were you born?

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
3%	5%	8%	6%	6%	7%	5%	7%	18 - 34
7%	11%	10%	12%	10%	12%	14%	15%	35 - 44
26%	23%	21%	22%	20%	22%	20%	24%	45 - 54
37%	37%	36%	37%	39%	34%	37%	32%	55 - 64
19%	18%	17%	20%	22%	24%	20%	16%	65 AND ABOVE
8%	6%	8%	3%	4%	1%	3%	5%	REFUSED

**Question 40**

Gender

<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	
81%	80%	76%	76%	80%	80%	79%	73%	MALE
19%	20%	24%	24%	20%	20%	21%	27%	FEMALE