



2022 STATE OF MANUFACTURING FALL SURVEY

Field Dates: August 16-September 20, 2022
 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>	<u>8/22</u>	
40%	44%	57%	51%	50%	49%	43%	45%	50%	VERY CONFIDENT
48%	47%	37%	41%	43%	40%	42%	42%	34%	SOMEWHAT CONFIDENT
7%	5%	5%	5%	5%	7%	10%	9%	11%	NOT VERY CONFIDENT
3%	4%	1%	1%	1%	3%	3%	3%	4%	NOT AT ALL CONFIDENT
1%	1%	--	1%	1%	1%	1%	*	*	DON'T KNOW/UNSURE
--	--	--	--	1%	*	*	1%	1%	REFUSED
89%	90%	94%	93%	93%	89%	85%	87%	85%	TOTAL CONFIDENT
11%	9%	6%	6%	5%	10%	14%	12%	14%	TOTAL NOT CONFIDENT

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>	<u>8/22</u>	
41%	54%	45%	48%	27%	20%	16%	GOTTEN BETTER
18%	14%	15%	19%	35%	46%	46%	GOTTEN WORSE
39%	32%	37%	30%	35%	32%	37%	STAYED ABOUT THE SAME
3%	1%	2%	3%	2%	2%	1%	DON'T KNOW
--	--	--	*	1%	*	*	REFUSED



Question 2

And, even though we only have a few months left in 2022, as you think about 2022 as a 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>	<u>8/22</u>	
42%	32%	58%	64%	49%	27%	20%	35%	19%	ECONOMIC EXPANSION
42%	48%	32%	28%	39%	39%	40%	44%	35%	FLAT ECONOMY
13%	15%	4%	4%	5%	24%	36%	18%	43%	RECESSION
3%	4%	5%	4%	6%	8%	4%	3%	3%	DON'T KNOW
--	*	--	--	1%	1%	*	*	--	REFUSED

Question 2A

And, what about next year? If you had to make a projection about the year 2023, do you think 2023 as a whole will be a time of economic expansion, a flat economy, or a recession?

- 19% ECONOMIC EXPANSION
- 34% A FLAT ECONOMY
- 43% A RECESSION
- 4% DON'T KNOW/UNSURE
- REFUSED

Question 2B

How confident are you that your company could withstand an economic recession in the next year?

- 43% VERY CONFIDENT
- 45% SOMEWHAT CONFIDENT
- 6% NOT VERY CONFIDENT
- 4% NOT AT ALL CONFIDENT
- 1% DON'T KNOW/UNSURE
- * REFUSED

- 88% TOTAL CONFIDENT**
- 10% TOTAL NOT CONFIDENT**



Question 5

As you look to the year-end, do you project your company's gross revenues for 2022 to increase or decrease compared to 2021, 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>	<u>8/22</u>	
25%	25%	35%	36%	29%	24%	17%	37%	27%	INCREASE BY MORE THAN 10%
19%	19%	20%	24%	30%	20%	5%	14%	12%	INCREASE BY LESS THAN 10%
2%	5%	2%	2%	2%	3%	9%	5%	6%	DECREASE BY LESS THAN 10%
4%	6%	5%	3%	4%	10%	39%	13%	15%	DECREASE BY MORE THAN 10%
47%	43%	36%	33%	32%	40%	29%	30%	38%	STAY THE SAME
1%	1%	2%	1%	2%	3%	1%	1%	2%	TOO SOON TO SAY/DON'T KNOW
*	--	--	--	1%	*	1%	1%	--	REFUSED
45%	44%	55%	60%	59%	44%	21%	51%	39%	TOTAL INCREASE
7%	12%	7%	5%	6%	13%	48%	18%	21%	TOTAL DECREASE

Question 6

And, as you look to the year-end, do you project your company's profitability for 2022 to increase or decrease compared to 2021, 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>	<u>8/22</u>	
14%	20%	27%	27%	23%	21%	14%	27%	19%	INCREASE BY MORE THAN 10%
16%	16%	17%	19%	22%	17%	10%	14%	12%	INCREASE BY LESS THAN 10%
4%	6%	2%	3%	4%	3%	8%	9%	8%	DECREASE BY LESS THAN 10%
5%	6%	5%	4%	5%	9%	33%	12%	17%	DECREASE BY MORE THAN 10%
60%	51%	46%	44%	43%	47%	34%	36%	42%	STAY THE SAME
*	*	2%	1%	2%	2%	1%	*	2%	TOO SOON TO SAY/DON'T KNOW
*	--	1%	1%	1%	*	1%	2%	*	REFUSED
30%	36%	44%	47%	45%	38%	24%	41%	31%	TOTAL INCREASE
9%	12%	7%	7%	9%	13%	41%	21%	25%	TOTAL DECREASE



Question 7

And, as you look to the year-end, do you project your company's capital expenditures for 2022 to increase or decrease compared to 2021, 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>	<u>8/22</u>	
14%	17%	15%	22%	19%	15%	17%	32%	22%	INCREASE BY MORE THAN 10%
13%	8%	8%	10%	11%	11%	8%	12%	8%	INCREASE BY LESS THAN 10%
6%	8%	4%	5%	6%	7%	10%	4%	7%	DECREASE BY LESS THAN 10%
11%	12%	8%	5%	10%	12%	24%	11%	10%	DECREASE BY MORE THAN 10%
55%	54%	63%	56%	52%	54%	40%	41%	51%	STAY THE SAME
*	2%	2%	1%	1%	2%	2%	1%	1%	TOO SOON TO SAY/DON'T KNOW
*	*	--	--	1%	*	*	*	*	REFUSED
27%	25%	23%	32%	31%	26%	25%	44%	30%	TOTAL INCREASE
17%	20%	12%	11%	15%	19%	33%	14%	17%	TOTAL DECREASE



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.

	10	8-10	5-7	1-4	MEAN
(8) Overall inflation					
8/22	27%	55%	34%	11%	7.4
(9) Recession					
8/22	17%	41%	41%	18%	6.5
(10) The costs of health care coverage					
8/22	19%	41%	34%	22%	6.4
9/21	26%	50%	33%	15%	7.0
9/20	25%	50%	30%	18%	6.9
3/20	27%	50%	29%	20%	6.9
4/19	32%	58%	26%	12%	7.5
3/18	31%	60%	25%	14%	7.4
2017	35%	59%	23%	17%	7.2
2016	30%	51%	25%	22%	6.8
2015	34%	56%	24%	20%	7.0
(11) Costs of employee salaries and benefits					
8/22	15%	41%	37%	19%	6.5
9/21	19%	46%	36%	17%	6.7
9/20	9%	24%	46%	28%	5.5
3/20	8%	23%	45%	28%	5.6
4/19	11%	29%	46%	22%	5.9
3/18	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
(12) Attracting qualified workers					
8/22	26%	53%	27%	19%	6.9
9/21	35%	61%	23%	15%	7.4
9/20	20%	36%	34%	27%	6.1
3/20	14%	40%	31%	27%	6.1
4/19	21%	46%	33%	19%	6.7
3/18	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



	10	8-10	5-7	1-4	MEAN
(13) Retaining qualified workers					
8/22	19%	43%	28%	27%	6.3
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
(14) Economic and global uncertainty					
8/22	18%	40%	43%	17%	6.6
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
(16) Developing future leaders					
8/22	13%	28%	38%	32%	5.6
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
(17) Lack of automation					
8/22	2%	5%	37%	56%	3.6
(18) Incoming and outgoing supply chain issues					
8/22	22%	48%	35%	16%	7.0
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? (ACCEPTED UP TO TWO OPTIONS)

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>	<u>8/22</u>	
29%	26%	34%	49%	48%	40%	32%	50%	44%	ATTRACTING AND RETAINING A QUALIFIED WORKFORCE
--	--	--	--	--	--	--	48%	44%	INCREASING COSTS OF MATERIALS FOR YOUR PRODUCTS
--	--	--	--	--	--	--	19%	25%	INFLATION
--	--	--	--	--	--	--	16%	13%	INCREASING COSTS OF WAGES
41%	34%	36%	36%	30%	31%	26%	9%	12%	COST OF HEALTH CARE INSURANCE
43%	40%	38%	18%	19%	33%	33%	10%	9%	UNFAVORABLE BUSINESS CLIMATE
--	--	--	--	--	--	--	--	5%	COST OR AVAILABILITY OF CAPITAL TO INVEST
--	--	--	--	--	--	--	--	4%	RISING INTEREST RATES
--	--	--	--	--	--	--	--	1%	APPLYING AUTOMATION
4%	3%	3%	2%	3%	1%	3%	1%	8%	OTHER
1%	1%	1%	*	2%	2%	1%	2%	1%	DON'T KNOW/NOT SURE
*	*	--	--	1%	*	--	--	--	REFUSED

Question 20

Is your company currently having capacity challenges meeting customer demand? Would you say your issues are mostly related to workforce, suppliers/materials, equipment/production, shipping/logistics, customers, or something else? (ACCEPTED UP TO TWO OPTIONS)

<u>9/21</u>	<u>8/22</u>	
39%	43%	NOT HAVING CHALLENGES
33%	30%	SUPPLIERS/MATERIALS ISSUES
36%	25%	WORKFORCE ISSUES
11%	5%	SHIPPING/LOGISTICS ISSUES
3%	3%	EQUIPMENT/PRODUCTION ISSUES
4%	2%	CUSTOMER ISSUES
1%	3%	SOMETHING ELSE
1%	4%	DON'T KNOW/NOT SURE
*	--	REFUSED
59%	53%	TOTAL YES, HAVING CHALLENGES
39%	43%	NO, NOT HAVING CHALLENGES



Question 23

Thinking ahead, what would you say are the two or three most important drivers of your company's future growth? (ACCEPTED UP TO THREE OPTIONS)

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>	<u>8/22</u>	
--	--	--	--	--	--	--	50%	44%	HIRING NEW EMPLOYEES
75%	82%	74%	61%	53%	57%	59%	38%	37%	NEW CUSTOMERS AND MARKETS
--	--	--	38%	49%	45%	27%	18%	22%	INCREASING PRODUCTIVITY
25%	27%	24%	22%	18%	14%	15%	19%	15%	DEVELOPING MANAGERS AND LEADERS
40%	51%	41%	35%	27%	26%	24%	18%	15%	NEW PRODUCTS
--	--	--	27%	20%	22%	16%	14%	12%	EFFECTIVE STRATEGIC PLANNING AND IMPLEMENTATION
--	--	--	--	--	--	--	--	8%	CAPITAL INVESTMENTS
--	--	--	--	--	--	--	18%	7%	IMPLEMENTING AND USING AUTOMATION
6%	6%	6%	2%	1%	2%	3%	1%	6%	OTHER
1%	5%	3%	1%	2%	2%	3%	2%	3%	DON'T KNOW/NOT SURE
*	*	--	*	1%	--	2%	*	1%	REFUSED

Question 24

For the entire year of 2022, do you expect an increase investment in any of the following areas? (ACCEPTED MULTIPLE RESPONSES)

<u>3/18</u>	<u>4/19</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	<u>8/22</u>	
--	--	--	--	--	63%	MANAGING COSTS DUE TO INFLATION
57%	58%	62%	51%	68%	54%	GROWING REVENUE AND PROFITABILITY
55%	54%	62%	44%	63%	51%	MAXIMIZING PRODUCTIVITY
30%	32%	37%	48%	53%	43%	EXPANDING SALES WITHIN THE UNITED STATES
27%	37%	33%	29%	44%	34%	STAFF DEVELOPMENT AND CULTURE
30%	37%	38%	30%	38%	29%	SYSTEMS AND TECHNOLOGY
--	--	--	--	--	22%	AUTOMATION
--	--	28%	24%	30%	21%	CYBER SECURITY
10%	13%	11%	10%	15%	15%	EXPANDING SALES GLOBALLY
*	*	*	--	1%	*	OTHER
8%	11%	9%	14%	7%	7%	NONE OF THE ABOVE
1%	2%	1%	1%	--	1%	DON'T KNOW/REFUSED



Question 25

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

<u>9/21</u>	<u>8/22</u>	
--	10%	A LOT
--	9%	SOME
--	4%	NOT TOO MANY
--	29%	ONLY A FEW
38%	47%	NO
*	1%	DON'T KNOW/NOT SURE
*	1%	REFUSED
62%	52%	TOTAL YES
38%	47%	NO

Question 26

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

<u>9/21</u>	<u>8/22</u>	
55%	48%	VERY DIFFICULT
32%	36%	SOMEWHAT DIFFICULT
7%	7%	NOT TOO DIFFICULT
4%	6%	NOT DIFFICULT AT ALL
1%	2%	DON'T KNOW
*	*	REFUSED
87%	84%	TOTAL DIFFICULT
12%	13%	TOTAL NOT DIFFICULT



Question 27

When thinking about attracting and hiring new employees, what does your company want to be known for? (ACCEPTED MULTIPLE RESPONSES)

<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	<u>8/22</u>	
35%	29%	69%	72%	GREAT WORK ENVIRONMENT
--	5%	57%	62%	SAFE WORK ENVIRONMENT
11%	8%	61%	62%	COMPETITIVE SALARY
12%	15%	58%	56%	WORK-LIFE BALANCE
7%	3%	47%	47%	FLEXIBLE SHIFTS AND WORK SCHEDULES
5%	3%	45%	43%	GREAT BENEFITS
13%	15%	42%	43%	INDUSTRY LEADER
5%	5%	45%	38%	CAREER GROWTH
--	4%	2%	2%	OTHER
5%	1%	2%	3%	DON'T KNOW
1%	2%	*	1%	REFUSED

^Note: Sept 2021 begin allowing multiple responses

Question 28

On a different topic, does your company's senior leadership have a succession plan?

<u>2017</u>	<u>3/20</u>	<u>9/20</u>	<u>9/21</u>	<u>8/22</u>	
50%	42%	49%	43%	50%	YES
48%	54%	45%	50%	45%	NO
2%	4%	6%	6%	4%	DON'T KNOW/NOT SURE
*	*	*	1%	--	REFUSED

Question 29

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

<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>	<u>8/22</u>	
39%	38%	54%	53%	49%	52%	55%	48%	YES
59%	61%	45%	47%	49%	44%	41%	51%	NO
1%	1%	1%	--	1%	3%	4%	1%	DON'T KNOW/NOT SURE
*	*	*	*	1%	*	--	*	REFUSED



Question 29B

(ASKED IF YES, HAVE FORMAL PLAN, N=193)

And, have you conducted strategic planning within the last 12 months?

- 84% YES
- 15% NO
- 1% DON'T KNOW/NOT SURE
- 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>	<u>8/22</u>	
28%	32%	33%	26%	29%	THE STRATEGY IS STRICTLY THE ROLE OF THE CEO
27%	28%	28%	31%	25%	WE HAVE A 1 TO 3 YEAR WRITTEN PLAN AND ALL STAFF KNOW THEIR ROLES
20%	16%	19%	22%	20%	OUR COMPANY HAS SOME IDEAS
18%	15%	11%	14%	12%	WE HAVE A WRITTEN PLAN, BUT THAT NEEDS TO BE BETTER COMMUNICATED
2%	1%	1%	1%	7%	DON'T HAVE A PLAN
1%	1%	2%	2%	2%	OTHER
3%	4%	5%	4%	4%	DON'T KNOW/NOT SURE
--	2%	*	*	2%	REFUSED

Question 31

On a different topic, has your company, or a company you work or have a relationship with, been hacked or experienced a data breach of some kind?

<u>9/21</u>	<u>8/22</u>	
--	10%	YOUR COMPANY
--	10%	COMPANY YOU WORK/HAVE RELATIONSHIP WITH
84%	81%	NO
1%	2%	DON'T KNOW/NOT SURE
*	--	REFUSED
15%	18%	TOTAL YES
84%	81%	NO



Question 32

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

9/21	8/22	
28%	35%	VERY CONFIDENT
56%	53%	SOMEWHAT CONFIDENT
9%	7%	NOT THAT CONFIDENT
5%	4%	NOT AT ALL CONFIDENT
1%	2%	DON'T KNOW/NOT SURE
*	*	REFUSED
84%	88%	TOTAL CONFIDENT
14%	10%	TOTAL NOT CONFIDENT

Question 32B

What has your company done or what do you plan to do for protection from hacking, data breaches, and other technological threats? (ACCEPTED MULTIPLE RESPONSES)

64%	UPGRADED TECHNOLOGY
38%	EMPLOYEE TRAINING
26%	INSURANCE
5%	LIMIT TECHNOLOGY USE/LIMITED ONLINE PRESENCE
2%	IT DEPARTMENT/WORKING WITH A SECURITY COMPANY
1%	FIREWALLS
2%	SOMETHING ELSE
2%	NOTHING
9%	DON'T KNOW/NOT SURE
3%	REFUSED

Question 33

Thinking about quality and business management system certifications, is your company ISO-certified?

17%	YES
74%	NO
9%	DON'T KNOW/NOT SURE
--	REFUSED



Question 34

(ASKED IF YES ISO CERTIFIED, N=68) Why have you implemented a quality/business management system? (ACCEPTED UP TO THREE OPTIONS)

<u>9/21</u>	<u>8/22</u>	
39%	40%	TO IMPROVE QUALITY
35%	30%	IMPROVE PROCESSES AND PERFORMANCE
35%	27%	CUSTOMER REQUIRED IT
11%	20%	RETAIN AND DEVELOP ORGANIZATIONAL KNOWLEDGE
17%	19%	DIFFERENTIATION AND COMPETITIVE ADVANTAGE
21%	16%	STRUCTURE AND CONTROL FOR GROWTH
1%	--	OTHER
1%	3%	DON'T KNOW/NOT SURE
--	3%	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>	<u>8/22</u>	
55%	55%	58%	53%	51%	61%	55%	49%	51%	UNDER 10
14%	15%	14%	18%	20%	14%	18%	20%	21%	11-25
9%	10%	8%	10%	9%	6%	7%	11%	9%	26-50
5%	7%	10%	12%	9%	8%	12%	10%	5%	51-100
5%	2%	5%	3%	6%	7%	3%	5%	4%	101-150
2%	2%	1%	2%	1%	1%	1%	1%	3%	151 TO 250
4%	2%	3%	3%	4%	4%	4%	4%	4%	MORE THAN 250
*	6%	*	--	--	--	--	--	2%	DON'T KNOW/NOT SURE
5%	2%	1%	*	*	--	*	*	1%	REFUSED
79%	80%	80%	80%	80%	80%	80%	80%	81%	TOTAL UNDER 50
10%	9%	15%	15%	15%	15%	15%	15%	9%	TOTAL 51-150
6%	3%	4%	5%	5%	5%	5%	5%	6%	TOTAL 151+



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>	<u>8/22</u>	
42%	47%	44%	45%	42%	47%	44%	37%	35%	UNDER \$1 MILLION
23%	25%	23%	24%	27%	24%	22%	28%	29%	\$1M - \$5 MILLION
6%	8%	6%	7%	9%	3%	5%	11%	8%	\$5M - \$10 MILLION
5%	5%	6%	6%	7%	9%	10%	8%	5%	\$10M - \$20 MILLION
10%	5%	7%	9%	10%	10%	10%	10%	9%	\$20M MILLION
14%	9%	13%	8%	6%	7%	9%	6%	13%	DON'T KNOW/NOT SURE/REFUSED
42%	47%	44%	45%	42%	47%	44%	37%	35%	UNDER \$1 MILLION
44%	44%	43%	47%	52%	46%	47%	57%	51%	TOTAL \$1M OR MORE
21%	19%	20%	23%	25%	22%	25%	29%	22%	\$5 MILL+



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>	<u>8/22</u>	
20%	17%	20%	16%	15%	14%	12%	14%	14%	METAL FABRICATION
14%	19%	14%	16%	23%	13%	25%	17%	12%	PROCESS MANUFACTURING
14%	18%	11%	10%	12%	9%	6%	8%	11%	AN ORIGINAL EQUIPMENT MANUFACTURER, OEM
18%	26%	12%	18%	24%	16%	14%	17%	11%	PRECISION MANUFACTURING
--	--	--	5%	4%	5%	6%	5%	6%	PRINTING/PAPER
--	--	--	--	--	2%	6%	4%	5%	RETAIL/RETAIL SALES/WHOLESALE
*	--	--	3%	1%	4%	3%	3%	4%	FOOD MANUFACTURING/FOOD AND BEVERAGE INDUSTRY
--	--	--	1%	1%	1%	2%	2%	3%	ANIMAL/AGRICULTURAL MANUFACTURING
--	--	--	7%	2%	2%	1%	1%	3%	TEXTILE MANUFACTURING/EMBROIDERY/APPAREL
--	--	--	7%	3%	2%	2%	3%	3%	WOODWORKING/WOOD MANUFACTURING
5%	4%	5%	7%	5%	5%	3%	5%	2%	PLASTICS
3%	--	--	2%	2%	2%	3%	--	2%	CABINET MANUFACTURING/DOORS/COUNTERTOPS
--	--	--	--	1%	*	2%	2%	2%	AUTOMOTIVE/AUTO REPAIR/TRANSPORTATION
3%	4%	3%	4%	4%	3%	2%	2%	2%	ELECTRONICS COMPONENTS
--	--	--	--	--	1%	2%	*	2%	SIGN MANUFACTURING
--	--	--	--	--	2%	4%	3%	1%	CONSTRUCTION
--	--	--	--	--	--	1%	*	1%	REPAIRS/MAINTENANCE
--	--	--	--	--	--	1%	*	1%	GRAPHIC DESIGN/ART
--	--	--	--	--	--	--	1%	1%	DISTRIBUTION
--	--	--	--	--	--	2%	*	1%	SERVICE/HOSPITALITY
--	--	--	--	--	--	--	2%	1%	MEDICAL MANUFACTURING
--	--	--	--	--	--	1%	1%	1%	CONSULTING
1%	2%	2%	1%	1%	2%	*	--	*	INFORMATION TECHNOLOGY, IT
--	--	--	--	1%	--	*	--	*	RECYCLING
--	--	--	--	--	--	--	1%	--	PAINTING/COATING
17%	8%	31%	3%	3%	17%	4%	5%	10%	SOMETHING ELSE
*	1%	--	--	--	*	*	--	1%	DON'T KNOW
4%	1%	*	--	--	--	*	*	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>	<u>8/22</u>	
*	1%	*	--	--	*	*	1%	1%	LESS THAN 1 YEAR
1%	5%	3%	3%	2%	3%	3%	1%	2%	1 - 3 YEARS
4%	6%	7%	6%	4%	5%	4%	3%	3%	4 - 6 YEARS
5%	7%	9%	7%	10%	11%	7%	10%	5%	7 - 10 YEARS
12%	11%	8%	10%	9%	8%	8%	10%	7%	11 - 15 YEARS
74%	69%	73%	73%	75%	73%	77%	75%	80%	16 YEARS OR MORE
*	--	--	--	--	*	--	--	1%	DON'T KNOW
4%	1%	--	*	*	--	*	--	1%	REFUSED
22%	30%	27%	27%	25%	27%	23%	25%	17%	TOTAL <16 YEARS
74%	69%	73%	73%	75%	73%	77%	75%	80%	TOTAL 16 YEARS+

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>	<u>8/22</u>	
3%	5%	8%	6%	6%	7%	5%	7%	9%	18 - 34
7%	11%	10%	12%	10%	12%	14%	15%	12%	35 - 44
26%	23%	21%	22%	20%	22%	20%	24%	19%	45 - 54
37%	37%	36%	37%	39%	34%	37%	32%	33%	55 - 64
19%	18%	17%	20%	22%	24%	20%	16%	19%	65 AND ABOVE
8%	6%	8%	3%	4%	1%	3%	5%	7%	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>	<u>8/22</u>	
81%	80%	76%	76%	80%	80%	79%	73%	73%	MALE
19%	20%	24%	24%	20%	20%	21%	27%	27%	FEMALE