

2024 STATE OF MANUFACTURING FALL SURVEY

Field Dates: August 21-September 19, 2024

Sample Size: N=400 Manufacturing Executives

2015 2016 2017 3/18 4/19 3/20 9/20 9/21 8/22 8/23 9/24

Table 6

Question 1:

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

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
**D/S (CONFIDENT - NOT CONFIDENT)	78%	82%	88%	87%	88%	79%	71%	75%	70%	73%	62%
TOTAL CONFIDENT	89%	90%	94%	93%	93%	89%	85%	87%	85%	86%	80%
TOTAL NOT CONFIDENT	11%	9%	6%	6%	5%	10%	14%	12%	14%	13%	18%
VERY CONFIDENT	40%	44%	57%	51%	50%	49%	43%	45%	50%	45%	38%
SOMEWHAT CONFIDENT	48%	47%	37%	41%	43%	40%	42%	42%	34%	41%	42%
NOT VERY CONFIDENT	7%	5%	5%	5%	5%	7%	10%	9%	11%	11%	13%
NOT AT ALL CONFIDENT	3%	4%	1%	1%	1%	3%	3%	3%	4%	2%	6%
DON'T KNOW/UNSURE	1%	1%	-	1%	1%	1%	1%	-	-	1%	1%
REFUSED	-	-	-	-	1%	-	-	1%	1%	-	-

Table 7

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?

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
**D/S (GOTTEN BETTER - GOTTEN WC)	-	-	22%	40%	30%	29%	-8%	-26%	-30%	-35%	-43%
GOTTEN BETTER	-	-	41%	54%	45%	48%	27%	20%	16%	14%	12%
GOTTEN WORSE	-	-	18%	14%	15%	19%	35%	46%	46%	50%	56%
STAYED ABOUT THE SAME	-	-	39%	32%	37%	30%	35%	32%	37%	34%	30%
DON'T KNOW	-	-	3%	1%	2%	3%	2%	2%	1%	2%	2%
REFUSED	-	-	-	-	-	-	1%	-	-	-	-

Table 8

Question 2:

And, even though we only have a few months left in 2024, as you think about this year, 2024, as a whole, do you think this year will be one of economic expansion, a flat economy, or a recession?

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
**D/S (ECONOMIC EXPANSION - RECI)	29%	17%	54%	60%	44%	3%	-16%	17%	-23%	-16%	-29%
ECONOMIC EXPANSION	42%	32%	58%	64%	49%	27%	20%	35%	19%	17%	12%
A FLAT ECONOMY	42%	48%	32%	28%	39%	39%	40%	44%	35%	45%	42%
A RECESSION	13%	15%	4%	4%	5%	24%	36%	18%	43%	33%	41%
DON'T KNOW/UNSURE	3%	4%	5%	4%	6%	8%	4%	3%	3%	5%	4%
REFUSED	-	-	-	-	1%	1%	-	-	-	-	-

Table 9

Question 2A:

And, what about next year? If you had to make a projection about the year 2025, do you think 2025 as a whole will be a time of economic expansion, a flat economy, or a recession?

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
**D/S (EXPANSION - RECESSION)	-	-	-	-	-	-	-	-	-24%	-17%	6%
ECONOMIC EXPANSION	-	-	-	-	-	-	-	-	19%	22%	26%
A FLAT ECONOMY	-	-	-	-	-	-	-	-	34%	35%	33%
A RECESSION	-	-	-	-	-	-	-	-	43%	39%	19%
DON'T KNOW/UNSURE	-	-	-	-	-	-	-	-	4%	4%	21%
REFUSED	-	-	-	-	-	-	-	-	-	-	2%

Table 10

Question 5:

As you look to the year-end, do you project your company's gross revenues for 2024 to increase or decrease compared to 2023, or will they probably stay the same?

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
**D/S (INCREASE - DECREASE)	38%	32%	48%	55%	53%	31%	-27%	33%	18%	6%	-16%
TOTAL INCREASE	45%	44%	55%	60%	59%	44%	21%	51%	39%	31%	24%
TOTAL DECREASE	7%	12%	7%	5%	6%	13%	48%	18%	21%	25%	40%
INCREASE BY MORE THAN 10%	25%	25%	35%	36%	29%	24%	17%	37%	27%	19%	15%
INCREASE BY LESS THAN 10%	19%	19%	20%	24%	30%	20%	5%	14%	12%	12%	9%
DECREASE BY LESS THAN 10%	2%	5%	2%	2%	2%	3%	9%	5%	6%	7%	13%
DECREASE BY MORE THAN 10%	4%	6%	5%	3%	4%	10%	39%	13%	15%	18%	27%
STAY THE SAME	47%	43%	36%	33%	32%	40%	29%	30%	38%	40%	34%
TOO SOON TO SAY/DON'T KNOW	1%	1%	2%	1%	2%	3%	1%	1%	2%	2%	2%
REFUSED	-	-	-	-	1%	-	1%	1%	-	1%	1%
STATUS QUO 3/3	22%	21%	20%	16%	12%	20%	11%	8%	16%	14%	11%

Table 11

Question 6:

And, as you look to the year-end, do you project your company's profitability for 2024 to increase or decrease compared to 2023, or will it probably stay the same?

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
**D/S (INCREASE - DECREASE)	21%	24%	37%	40%	36%	26%	-17%	19%	6%	-	-20%
TOTAL INCREASE	30%	36%	44%	47%	45%	38%	24%	41%	31%	26%	21%
TOTAL DECREASE	9%	12%	7%	7%	9%	13%	41%	21%	25%	26%	41%



`10	8%	6%	7%	9%	11%	8%	9%	19%	15%	14%	13%
`8-10	18%	19%	20%	27%	29%	23%	24%	46%	41%	37%	38%
`5-7	44%	41%	42%	46%	46%	45%	46%	36%	37%	42%	42%
`1-4	36%	39%	37%	26%	22%	28%	28%	17%	19%	21%	18%
`9	3%	2%	2%	3%	5%	4%	4%	7%	6%	6%	7%
`8	8%	11%	10%	15%	14%	11%	11%	19%	20%	17%	18%
`7	11%	9%	10%	14%	14%	14%	13%	14%	16%	13%	15%
`6	8%	6%	9%	13%	9%	9%	8%	6%	7%	8%	7%
`5	24%	26%	23%	18%	24%	22%	25%	16%	14%	21%	20%
`4	7%	6%	6%	4%	4%	6%	5%	4%	4%	4%	5%
`3	7%	9%	9%	6%	6%	7%	6%	4%	4%	4%	5%
`2	6%	7%	10%	6%	3%	5%	5%	4%	4%	4%	2%
`1	16%	17%	12%	11%	10%	10%	12%	5%	8%	9%	7%
DON'T KNOW/REFUSED	2%	1%	2%	1%	2%	3%	3%	1%	2%	1%	2%
MEAN	5	4.8	5	5.7	5.9	5.6	5.5	6.7	6.5	6.2	6.4

**Table 16**

**Question 12:**

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 an number between one and ten depending on how strongly you feel about it.

**Attracting qualified workers**

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
`10	12%	10%	12%	19%	21%	14%	20%	35%	26%	22%	19%
`8-10	33%	32%	31%	47%	46%	40%	36%	61%	53%	44%	41%
`5-7	36%	33%	36%	30%	33%	31%	34%	23%	27%	31%	36%
`1-4	30%	34%	31%	22%	19%	27%	27%	15%	19%	23%	22%
`9	6%	6%	7%	9%	9%	7%	3%	9%	8%	7%	7%
`8	15%	15%	12%	19%	16%	19%	13%	17%	18%	15%	15%
`7	14%	9%	12%	12%	14%	13%	13%	8%	8%	13%	10%
`6	4%	7%	8%	6%	6%	4%	7%	5%	7%	6%	7%
`5	19%	17%	17%	12%	13%	14%	14%	10%	12%	13%	19%
`4	4%	5%	6%	3%	3%	6%	4%	1%	3%	4%	2%
`3	6%	7%	7%	4%	4%	5%	8%	3%	3%	4%	7%
`2	4%	5%	5%	4%	3%	4%	5%	3%	4%	5%	5%
`1	15%	18%	13%	11%	9%	12%	10%	7%	9%	10%	7%
DON'T KNOW/REFUSED	1%	1%	2%	-	2%	2%	2%	1%	1%	1%	2%
MEAN	5.7	5.5	5.7	6.5	6.7	6.1	6.1	7.4	6.9	6.5	6.4

**Table 17**

**Question 13:**

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 an number between one and ten depending on how strongly you feel about it.

**Retaining qualified workers**

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
`10	12%	10%	12%	15%	13%	12%	15%	24%	19%	16%	13%
`8-10	33%	32%	31%	36%	37%	33%	36%	49%	43%	36%	34%
`5-7	36%	33%	36%	33%	35%	30%	34%	28%	28%	37%	34%
`1-4	30%	34%	31%	30%	26%	35%	29%	22%	27%	27%	31%
`9	6%	6%	7%	6%	7%	4%	6%	5%	8%	6%	6%
`8	15%	15%	12%	15%	17%	16%	14%	19%	17%	14%	15%
`7	14%	9%	12%	12%	12%	9%	12%	11%	9%	13%	8%
`6	4%	7%	8%	7%	6%	7%	8%	7%	7%	8%	6%
`5	19%	17%	17%	14%	18%	14%	14%	11%	12%	15%	20%
`4	4%	5%	6%	3%	2%	5%	5%	3%	7%	5%	6%
`3	6%	7%	7%	7%	6%	7%	6%	5%	4%	5%	8%
`2	4%	5%	5%	7%	6%	9%	6%	5%	5%	4%	4%
`1	15%	18%	13%	13%	12%	15%	12%	8%	11%	13%	12%
DON'T KNOW/REFUSED	1%	1%	2%	1%	1%	2%	2%	1%	1%	1%	2%
MEAN	5.7	5.5	5.7	5.8	6	5.5	5.9	6.7	6.3	6	5.7

**Table 18**

**Question 16:**

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 an number between one and ten depending on how strongly you feel about it.

**Developing future leaders**

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
`10	4%	6%	12%	8%	8%	8%	11%	16%	13%	14%	12%
`8-10	13%	12%	26%	25%	23%	23%	28%	30%	28%	28%	28%
`5-7	32%	27%	38%	40%	44%	43%	43%	45%	38%	41%	39%
`1-4	54%	60%	35%	34%	31%	31%	28%	23%	32%	31%	31%
`9	2%	1%	4%	4%	3%	3%	4%	3%	5%	6%	4%
`8	6%	5%	10%	13%	12%	12%	12%	12%	11%	9%	12%
`7	9%	7%	10%	8%	12%	8%	10%	14%	11%	11%	11%
`6	6%	5%	6%	8%	6%	9%	7%	8%	8%	6%	7%

'5	17%	15%	22%	23%	27%	27%	25%	22%	18%	24%	22%
'4	4%	5%	5%	5%	5%	5%	5%	5%	7%	7%	6%
'3	7%	6%	7%	8%	6%	8%	6%	4%	7%	7%	8%
'2	14%	13%	8%	7%	7%	6%	5%	6%	6%	5%	6%
'1	30%	36%	15%	14%	14%	13%	11%	8%	12%	12%	11%
DON'T KNOW/REFUSED	1%	1%	1%	2%	2%	3%	2%	2%	2%	1%	2%
MEAN	3.9	3.7	5.3	5.2	5.3	5.2	5.6	6	5.6	5.6	5.6

**Table 19**

**Question 19OE:**

**Next, thinking about your company, what would you say are the one or two most important issues affecting your business and its future success?**

<b>BASE=TOTAL SAMPLE</b>	400	400	400	400	400	400	400	400	400	400	400
COSTS/ECONOMY	-	-	-	-	-	-	-	-	-	-	61%
ECONOMY/INFLATION	-	-	-	-	-	-	-	-	-	-	29%
MATERIAL COSTS/COST OF GOODS	-	-	-	-	-	-	-	-	-	-	14%
COSTS/COST OF DOING BUSINESS (NC-	-	-	-	-	-	-	-	-	-	-	11%
TAXES/INCREASED TAXES	-	-	-	-	-	-	-	-	-	-	11%
INSURANCE COSTS/HEALTH INSURAN-	-	-	-	-	-	-	-	-	-	-	8%
INTEREST RATES	-	-	-	-	-	-	-	-	-	-	4%
WEATHER/CLIMATE CHANGE	-	-	-	-	-	-	-	-	-	-	2%
LABOR COST/WAGES	-	-	-	-	-	-	-	-	-	-	1%
EMPLOYEE/CUSTOMER	-	-	-	-	-	-	-	-	-	-	38%
EMPLOYEES/FINDING QUALIFIED EMF-	-	-	-	-	-	-	-	-	-	-	34%
CUSTOMER BASE/ATTRACTING NEW I-	-	-	-	-	-	-	-	-	-	-	6%
SALES/GROWTH	-	-	-	-	-	-	-	-	-	-	21%
SALES/NOT GETTING SALES/ CUSTOM-	-	-	-	-	-	-	-	-	-	-	13%
COMPETITION/LARGE AMOUNT OF C-	-	-	-	-	-	-	-	-	-	-	5%
GROWTH/EXPANSION	-	-	-	-	-	-	-	-	-	-	3%
GOVERNMENT	-	-	-	-	-	-	-	-	-	-	18%
GOVERNMENT REGULATIONS	-	-	-	-	-	-	-	-	-	-	10%
GOVERNMENT (NON SPECIFIC)	-	-	-	-	-	-	-	-	-	-	5%
ELECTION/WHO WILL BE PRESIDENT	-	-	-	-	-	-	-	-	-	-	3%
OTHER MENTIONS	-	-	-	-	-	-	-	-	-	-	6%
SUPPLY CHAIN/AVAILABILITY OF SUPP-	-	-	-	-	-	-	-	-	-	-	6%
OTHER	-	-	-	-	-	-	-	-	-	-	2%
NONE/NOTHING	-	-	-	-	-	-	-	-	-	-	1%
DON'T KNOW	-	-	-	-	-	-	-	-	-	-	1%
REFUSED	-	-	-	-	-	-	-	-	-	-	-

**Table 20**

**Question 19:**

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

**First Choice.**

<b>BASE=TOTAL SAMPLE</b>	400	400	400	400	400	400	400	400	400	400	400
INFLATION	-	-	-	-	-	-	-	14%	16%	20%	20%
INCREASING COSTS OF MATERIALS FC-	-	-	-	-	-	-	-	27%	27%	17%	18%
ATTRACTING AND RETAINING A QUAI	19%	17%	25%	33%	37%	30%	23%	31%	31%	28%	18%
UNFAVORABLE BUSINESS CLIMATE	29%	26%	26%	11%	13%	23%	25%	6%	4%	9%	15%
COST OF HEALTH CARE INSURANCE	18%	21%	18%	21%	16%	20%	16%	5%	6%	5%	8%
INCREASING COSTS OF WAGES	-	-	-	-	-	-	-	7%	6%	8%	5%
RISING INTEREST RATES	-	-	-	-	-	-	-	-	2%	6%	5%
COST OR AVAILABILITY OF CAPITAL TC-	-	-	-	-	-	-	-	-	2%	3%	2%
APPLYING AUTOMATION	-	-	-	-	-	-	-	-	1%	1%	1%
OTHER	4%	3%	3%	1%	3%	1%	2%	1%	4%	2%	5%
DON'T KNOW/NOT SURE	1%	1%	1%	-	2%	2%	1%	2%	1%	1%	2%
REFUSED	-	-	-	-	1%	-	-	-	-	-	-

**Table 21**

**Question 19C:**

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

**Combined Choices.**

<b>BASE=TOTAL SAMPLE</b>	400	400	400	400	400	400	400	400	400	400	400
INFLATION	-	-	-	-	-	-	-	19%	25%	31%	33%
INCREASING COSTS OF MATERIALS FC-	-	-	-	-	-	-	-	48%	44%	31%	30%
ATTRACTING AND RETAINING A QUAI	29%	26%	34%	49%	48%	40%	32%	50%	44%	39%	27%
UNFAVORABLE BUSINESS CLIMATE	43%	40%	38%	18%	19%	33%	33%	10%	9%	13%	21%
COST OF HEALTH CARE INSURANCE	41%	34%	36%	36%	30%	31%	26%	9%	12%	14%	15%
INCREASING COSTS OF WAGES	-	-	-	-	-	-	-	16%	13%	15%	13%
RISING INTEREST RATES	-	-	-	-	-	-	-	-	4%	8%	10%
COST OR AVAILABILITY OF CAPITAL TC-	-	-	-	-	-	-	-	-	5%	6%	5%
APPLYING AUTOMATION	-	-	-	-	-	-	-	-	1%	2%	2%
OTHER	4%	3%	3%	2%	3%	1%	3%	1%	8%	5%	9%
DON'T KNOW/NOT SURE	1%	1%	1%	-	2%	2%	1%	2%	1%	1%	2%
REFUSED	-	-	-	-	1%	-	-	-	-	-	-

**Table 22**

**Question 20:**

**Is your company currently having challenges meeting customer demand?**





BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400	
**D/S (YES - NO)	-	-	-	-	-	-	-	-	-	34%	29%	30%
YES	-	-	-	-	-	-	-	-	-	41%	37%	39%
NO	-	-	-	-	-	-	-	-	-	7%	8%	9%
DON'T KNOW/NOT SURE	-	-	-	-	-	-	-	-	-	-	1%	-
REFUSED	-	-	-	-	-	-	-	-	-	-	-	-

**Table 33**

**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?

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
WE HAVE A 1 TO 3 YEAR WRITTEN PL-	-	-	-	27%	28%	28%	-	31%	25%	29%	30%
WE HAVE A WRITTEN PLAN, BUT THA -	-	-	-	18%	15%	11%	-	14%	12%	8%	10%
OUR COMPANY HAS SOME IDEAS. -	-	-	-	20%	16%	19%	-	22%	20%	18%	16%
THE STRATEGY IS STRICTLY THE ROLE -	-	-	-	28%	32%	33%	-	26%	29%	28%	29%
OTHER	-	-	-	1%	1%	2%	-	2%	2%	4%	7%
DON'T KNOW/NOT SURE	-	-	-	3%	4%	5%	-	4%	4%	5%	1%
REFUSED	-	-	-	-	2%	-	-	-	2%	1%	2%
DON'T HAVE A PLAN	-	-	-	2%	1%	1%	-	1%	7%	6%	6%

**Table 34**

**Question 31:**

Does your organization have a formal, published Vision, Mission, and Values?

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
**D/S (YES - NO)	-	-	-	-	-	-	-	-	-	-11%	-5%
YES	-	-	-	-	-	-	-	-	-	43%	47%
NO	-	-	-	-	-	-	-	-	-	54%	52%
DON'T KNOW/NOT SURE	-	-	-	-	-	-	-	-	-	2%	1%
REFUSED	-	-	-	-	-	-	-	-	-	-	-

**Table 35**

**Question 33:**

Thinking about formal quality and business management systems, such as ISO, is your company pursuing a formal quality system?

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400	
**D/S (YES - NO)	-	-	-	-	-	-	-	-	-	-57%	-52%	-32%
YES	-	-	-	-	-	-	-	-	-	17%	19%	32%
NO	-	-	-	-	-	-	-	-	-	74%	71%	64%
DON'T KNOW/NOT SURE	-	-	-	-	-	-	-	-	-	9%	10%	3%
REFUSED	-	-	-	-	-	-	-	-	-	-	-	1%

**Table 36**

**Question 33B:**

And, does your company have any plan in the future to pursue a formal quality and business management system, such as ISO?

BASE=NO Q.33	-	-	-	-	-	-	-	-	295	282	254
**D/S (YES - NO)	-	-	-	-	-	-	-	-	-	-84%	-83%
YES	-	-	-	-	-	-	-	-	-	7%	7%
NO	-	-	-	-	-	-	-	-	-	91%	90%
DON'T KNOW/NOT SURE	-	-	-	-	-	-	-	-	-	1%	3%
REFUSED	-	-	-	-	-	-	-	-	-	-	-
BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
**D/S (YES - NO)	-	-	-	-	-	-	-	-	-	-59%	-53%
YES	-	-	-	-	-	-	-	-	-	5%	4%
NO	-	-	-	-	-	-	-	-	-	64%	57%
DON'T KNOW/NOT SURE	-	-	-	-	-	-	-	-	-	1%	2%
REFUSED	-	-	-	-	-	-	-	-	-	-	-

**Table 37**

**Question 33C:**

What are some of the reasons your company might consider adopting a formal quality and business management system? Are there any reasons you think you might need a more formal system in the future? What are those?

BASE=NO Q.33B	-	-	-	-	-	-	-	-	257	229
CUSTOMER NEED/CUSTOMERS ASK F -	-	-	-	-	-	-	-	-	-	14%
SIZE OF COMPANY/GROWTH IN SIZE/ -	-	-	-	-	-	-	-	-	-	13%
SALES/PROFITABILITY	-	-	-	-	-	-	-	-	-	4%
EFFICIENCY/BETTER PRODUCTION FL -	-	-	-	-	-	-	-	-	-	4%
OTHER	-	-	-	-	-	-	-	-	-	1%
NONE/NOTHING/NOT INTERESTED/W -	-	-	-	-	-	-	-	-	-	63%
DON'T KNOW	-	-	-	-	-	-	-	-	-	4%
REFUSED	-	-	-	-	-	-	-	-	-	-

**Table 38**

**Question 34:**

Below are some of the reasons manufacturers have given us for why they have implemented a formal quality and business management system. Do any of these reasons apply to you? Please choose as many as apply. And, if there is another reason you have implemented a formal system, please specify the reason.

BASE=TOTAL ASKED	-	-	-	-	-	-	-	117	68	75	128
------------------	---	---	---	---	---	---	---	-----	----	----	-----









REFUSED - - - - - 1%

**Table 51**

**Question X1E:**

Thinking about some of these issues, I will read you a few short descriptions of developments coming out of last year's legislative session, and I want to know whether it affected your business, and if so, how much.

The requirement that small businesses must contribute to employees' paid leave at the same rate as larger corporations

How much did this development affect your business? Would you say it had a major effect, minor effect, or no effect on your business?

BASE=TOTAL ASKED	-	-	-	-	-	-	-	-	-	-	400
**D/S (MAJOR EFFECT - MINOR EFFECT)	-	-	-	-	-	-	-	-	-	-	3%
MAJOR EFFECT	-	-	-	-	-	-	-	-	-	-	34%
MINOR EFFECT	-	-	-	-	-	-	-	-	-	-	31%
NO EFFECT	-	-	-	-	-	-	-	-	-	-	34%
DON'T KNOW/UNSURE	-	-	-	-	-	-	-	-	-	-	1%
REFUSED	-	-	-	-	-	-	-	-	-	-	

**Table 52**

**Question X1F:**

Thinking about some of these issues, I will read you a few short descriptions of developments coming out of last year's legislative session, and I want to know whether it affected your business, and if so, how much.

The new wage theft law that makes property owners and developers responsible for any wage theft by construction subcontractors

How much did this development affect your business? Would you say it had a major effect, minor effect, or no effect on your business?

BASE=TOTAL ASKED	-	-	-	-	-	-	-	-	-	-	400
**D/S (MAJOR EFFECT - MINOR EFFECT)	-	-	-	-	-	-	-	-	-	-	-9%
MAJOR EFFECT	-	-	-	-	-	-	-	-	-	-	7%
MINOR EFFECT	-	-	-	-	-	-	-	-	-	-	16%
NO EFFECT	-	-	-	-	-	-	-	-	-	-	75%
DON'T KNOW/UNSURE	-	-	-	-	-	-	-	-	-	-	2%
REFUSED	-	-	-	-	-	-	-	-	-	-	1%

**Table 53**

**Question X2:**

Do you think these legislative developments have made Minnesota more attractive or less attractive for businesses, or does it have no real effect one way or the other?

BASE=TOTAL ASKED	-	-	-	-	-	-	-	-	-	106	400
**D/S (MORE ATTRACTIVE - LESS ATTRACTIVE)	-	-	-	-	-	-	-	-	-	-53%	-57%
TOTAL MORE ATTRACTIVE	-	-	-	-	-	-	-	-	-	7%	8%
TOTAL LESS ATTRACTIVE	-	-	-	-	-	-	-	-	-	60%	65%
MUCH MORE ATTRACTIVE	-	-	-	-	-	-	-	-	-	4%	2%
SOMEWHAT MORE ATTRACTIVE	-	-	-	-	-	-	-	-	-	3%	6%
SOMEWHAT LESS ATTRACTIVE	-	-	-	-	-	-	-	-	-	18%	19%
MUCH LESS ATTRACTIVE	-	-	-	-	-	-	-	-	-	42%	45%
NO EFFECT ONE WAY OR THE OTHER	-	-	-	-	-	-	-	-	-	29%	24%
TOO SOON TO SAY/DON'T KNOW	-	-	-	-	-	-	-	-	-	4%	2%
REFUSED	-	-	-	-	-	-	-	-	-	1%	2%

**Table 54**

**Question 35:**

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

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
TOTAL UNDER 50	79%	80%	80%	80%	80%	80%	80%	80%	81%	81%	81%
TOTAL 51-100	5%	7%	10%	12%	9%	8%	12%	10%	5%	6%	6%
TOTAL 101+	11%	5%	9%	8%	11%	11%	8%	10%	11%	8%	11%
UNDER 10	55%	55%	58%	53%	51%	61%	55%	49%	51%	51%	51%
`11-25	14%	15%	14%	18%	20%	14%	18%	20%	21%	20%	20%
`26-50	9%	10%	8%	10%	9%	6%	7%	11%	9%	10%	10%
`51-100	5%	7%	10%	12%	9%	8%	12%	10%	5%	6%	6%
`101-150	5%	2%	5%	3%	6%	7%	3%	5%	4%	3%	5%
`151 TO 250	2%	2%	1%	2%	1%	1%	1%	1%	3%	1%	2%
MORE THAN 250	4%	2%	3%	3%	4%	4%	4%	4%	4%	4%	4%
DON'T KNOW/NOT SURE	-	6%	-	-	-	-	-	-	2%	2%	-
REFUSED	5%	2%	1%	-	-	-	-	-	1%	3%	1%
TOTAL UNDER 10	55%	55%	58%	53%	51%	61%	55%	49%	51%	51%	51%
TOTAL 11-50	23%	25%	22%	27%	29%	19%	25%	31%	30%	30%	30%
TOTAL 51-150	10%	9%	15%	15%	15%	15%	15%	15%	9%	9%	11%
TOTAL 151+	6%	3%	4%	5%	5%	5%	5%	5%	6%	5%	6%

**Table 55**

**Question 36:**

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

BASE=TOTAL SAMPLE	400	400	400	400	400	400	400	400	400	400	400
**D/S (UNDER \$1M - \$1M OR MORE)	-2%	3%	2%	-2%	-11%	2%	-2%	-19%	-16%	-18%	-21%
UNDER \$1 MILLION	42%	47%	44%	45%	42%	47%	44%	37%	35%	34%	36%
TOTAL \$1M OR MORE	44%	44%	43%	47%	52%	46%	47%	57%	51%	52%	57%
\$1 MILLION - \$5 MILLION	23%	25%	23%	24%	27%	24%	22%	28%	29%	29%	32%



OWNER	40%	40%	40%	38%	39%	48%	45%	36%	46%	38%	40%
PRESIDENT/CEO	26%	28%	22%	22%	27%	20%	20%	20%	17%	20%	30%
MANAGER	9%	13%	20%	27%	19%	19%	18%	26%	22%	19%	21%
MANAGEMENT TEAM MEMBER	3%	2%	4%	4%	8%	9%	11%	9%	2%	6%	6%
OTHER	1%	2%	15%	2%	2%	3%	3%	3%	14%	17%	3%

**Table 61**  
**Question REG:**  
**Region./County.**

<b>BASE=TOTAL SAMPLE</b>	400	400	400	400	400	400	400	400	400	400	400
COLLAR	22%	22%	22%	22%	22%	22%	22%	22%	22%	22%	22%
ANOKA	10%	8%	7%	8%	8%	7%	9%	6%	8%	8%	6%
CARVER	2%	1%	1%	1%	1%	1%	2%	2%	1%	1%	1%
DAKOTA	4%	5%	8%	5%	7%	6%	5%	6%	5%	5%	7%
SCOTT	2%	2%	2%	2%	1%	2%	1%	2%	2%	2%	2%
WASHINGTON	2%	3%	2%	4%	3%	4%	2%	4%	3%	3%	3%
WRIGHT	3%	2%	2%	2%	2%	2%	3%	2%	2%	2%	2%
MINN-SP	35%	35%	35%	35%	35%	35%	35%	35%	35%	35%	35%
HENNEPIN	27%	26%	25%	27%	26%	26%	25%	27%	27%	26%	25%
RAMSEY	8%	9%	10%	8%	9%	9%	10%	8%	8%	9%	10%
NORTHEAST	12%	12%	12%	12%	12%	12%	12%	12%	12%	12%	12%
AITKIN	1%	-	-	-	-	-	-	1%	-	-	1%
BELTRAMI	1%	1%	1%	-	-	-	1%	-	1%	-	-
CARLTON	-	-	-	-	-	-	-	-	-	-	-
CASS	1%	-	-	-	-	1%	-	1%	-	-	1%
CHISAGO	2%	2%	1%	-	1%	2%	1%	1%	1%	1%	1%
COOK	-	-	-	-	-	-	-	-	1%	-	-
CROW WING	-	-	1%	1%	1%	1%	1%	1%	2%	1%	-
ISANTI	1%	1%	2%	1%	2%	1%	2%	2%	1%	1%	1%
ITASCA	1%	1%	-	-	-	1%	2%	-	1%	3%	1%
KANABEC	-	-	1%	-	1%	-	-	2%	-	-	1%
KOOCHICHING	1%	1%	-	-	-	-	-	-	-	-	1%
LAKE	-	-	1%	-	-	-	-	-	-	-	-
MILLIE LACS	-	-	1%	-	1%	1%	1%	1%	-	-	1%
MORRISON	-	-	-	-	-	-	-	1%	-	1%	1%
PINE	1%	-	-	1%	-	-	-	1%	-	-	-
ST. LOUIS	3%	3%	4%	4%	5%	4%	4%	3%	3%	3%	3%
SOUTH	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%	11%
BLUE EARTH	-	2%	1%	-	1%	1%	1%	1%	1%	1%	2%
DODGE	-	-	1%	-	1%	-	1%	-	1%	-	1%
FARIBAULT	1%	-	-	-	-	1%	-	1%	1%	-	-
FILLMORE	-	-	-	-	-	1%	-	-	-	-	1%
FREEBORN	1%	1%	1%	1%	1%	1%	1%	-	-	1%	-
GOODHUE	-	1%	1%	-	2%	1%	-	-	-	-	-
HOUSTON	-	-	-	1%	-	-	-	-	1%	-	-
LE SUEUR	2%	-	1%	2%	-	1%	-	1%	1%	1%	1%
MOWER	-	1%	-	-	-	-	-	-	-	-	1%
OLMSTED	2%	2%	1%	1%	1%	2%	1%	1%	2%	1%	2%
RICE	1%	1%	1%	1%	2%	1%	2%	1%	2%	1%	1%
STEELE	2%	2%	2%	1%	1%	1%	1%	1%	1%	1%	1%
WABASHA	1%	-	-	-	-	1%	-	1%	1%	-	-
WASECA	-	-	-	-	-	-	1%	-	-	-	-
WINONA	-	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%
WEST-NW	20%	20%	21%	20%	20%	21%	21%	21%	21%	21%	20%
BECKER	1%	1%	1%	1%	-	1%	-	1%	1%	1%	1%
BENTON	1%	1%	1%	-	1%	1%	2%	-	1%	1%	-
BIG STONE	-	-	-	-	-	-	-	-	-	-	-
BROWN	1%	1%	-	1%	1%	1%	1%	-	-	1%	-
CHIPPEWA	-	-	-	1%	1%	-	-	1%	1%	1%	-
CLAY	1%	-	1%	1%	1%	-	-	-	-	-	-
CLEARWATER	-	-	-	-	-	-	-	-	-	-	-
COTTONWOOD	-	-	-	-	-	-	-	-	-	-	-
DOUGLAS	1%	-	-	1%	1%	1%	1%	2%	1%	1%	-
GRANT	-	-	-	-	-	-	-	-	-	-	1%
HUBBARD	-	-	-	-	1%	-	-	-	-	-	1%
JACKSON	-	-	-	-	-	1%	-	-	-	-	-
KANDIYOHI	-	1%	2%	-	-	-	2%	2%	1%	1%	2%
KITSON	-	-	-	-	-	-	-	-	-	-	-
LAC QUI PARLE	-	-	-	-	-	-	-	-	-	-	-
LAKE OF THE WOODS	-	-	-	-	-	-	-	-	-	-	-
LINCOLN	-	-	-	-	-	-	-	-	-	-	-
LYON	-	-	-	1%	-	-	-	-	-	-	-
MCLEOD	2%	1%	2%	-	2%	-	1%	1%	1%	-	1%
MAHNOMEN	-	-	-	-	-	-	-	-	-	-	-
MARSHALL	-	1%	1%	1%	-	-	-	-	-	-	-
MARTIN	1%	-	1%	1%	1%	-	1%	1%	1%	1%	1%
MEEKER	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
MURRAY	-	-	-	-	-	-	-	-	-	-	-
NICOLLET	1%	-	1%	-	-	-	1%	-	-	-	-
NOBLES	-	-	-	-	-	-	-	-	-	-	1%
NORMAN	-	-	-	-	-	-	-	-	1%	-	-
OTTER TAIL	1%	3%	1%	2%	2%	1%	1%	2%	2%	1%	1%

PENNINGTON	1%	-	-	-	-	-	-	-	1%	2%	-
PIPESTONE	-	-	-	-	-	-	-	-	1%	1%	1%
POLK	-	-	-	1%	-	-	-	1%	1%	-	1%
POPE	1%	1%	1%	-	1%	-	1%	1%	-	1%	1%
RED LAKE	-	-	-	-	1%	-	-	-	-	-	-
REDWOOD	-	1%	-	1%	-	-	-	-	-	-	-
RENVILLE	-	-	-	-	-	-	-	1%	-	-	-
ROCK	-	1%	-	-	-	1%	-	-	-	-	-
ROSEAU	-	-	-	1%	-	1%	1%	-	-	1%	-
SHERBURNE	3%	3%	1%	3%	2%	3%	2%	3%	2%	1%	1%
SIBLEY	1%	-	-	-	-	-	-	-	-	-	-
STEARNS	2%	2%	2%	2%	2%	2%	3%	2%	3%	3%	4%
STEVENS	-	-	-	-	-	-	-	-	1%	-	1%
SWIFT	-	-	-	-	-	-	1%	-	-	-	-
TODD	-	-	1%	-	-	-	-	1%	-	-	-
TRAVERSE	-	-	-	-	-	-	-	-	-	-	-
WADENA	-	-	-	-	-	-	-	-	-	-	-
WATONWAN	-	-	-	-	-	-	-	-	-	-	-
WILKIN	-	-	-	-	-	-	-	-	-	-	-
YELLOW MEDICINE	-	-	-	-	-	-	-	-	-	-	1%
REGION II											
TWIN CITIES	57%	57%	57%	57%	57%	57%	57%	57%	57%	57%	57%
REST OF STATE	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%	43%

**Table 62**  
**Question GREG:**  
**Greater MN Regions./County.**

<b>BASE=TOTAL SAMPLE</b>	400	400	400	400	400	400	400	400	400	400	400
IF INITIATIVE FOUNDATION	14%	14%	14%	14%	13%	13%	16%	14%	14%	13%	13%
BENTON	1%	1%	1%	-	1%	1%	2%	-	1%	1%	-
CASS	1%	-	-	-	-	1%	-	1%	-	-	1%
CHISAGO	2%	2%	1%	-	1%	2%	1%	1%	1%	1%	1%
CROW WING	-	1%	1%	1%	1%	1%	1%	1%	2%	1%	-
ISANTI	1%	1%	2%	1%	2%	1%	2%	2%	1%	1%	1%
KANABEC	-	-	1%	-	1%	-	2%	-	-	1%	-
MILLIE LACS	-	1%	-	1%	1%	1%	-	1%	-	-	1%
MORRISON	-	-	-	-	-	-	-	1%	-	1%	1%
PINE	1%	-	-	1%	-	-	-	1%	-	-	-
SHERBURNE	3%	3%	1%	3%	2%	3%	2%	3%	2%	1%	1%
STEARNS	2%	2%	2%	2%	2%	2%	3%	2%	3%	3%	4%
TODD	-	-	1%	-	-	-	-	1%	-	-	-
WADENA	-	-	-	-	-	-	-	-	-	-	-
WRIGHT	3%	2%	2%	2%	2%	2%	3%	2%	2%	2%	2%
NORTHLAND FOUNDATION	5%	6%	6%	6%	6%	6%	6%	5%	6%	6%	6%
AITKIN	1%	-	-	-	-	-	-	1%	-	-	1%
CARLTON	-	-	-	-	-	-	-	-	-	-	-
COOK	-	-	-	-	-	-	-	-	1%	-	-
ITASCA	1%	1%	-	-	-	1%	2%	-	1%	3%	1%
KOOCHICHING	1%	1%	-	-	-	-	-	-	-	1%	-
LAKE	-	-	1%	-	-	-	-	-	-	-	-
ST. LOUIS	3%	3%	4%	4%	5%	4%	4%	3%	3%	3%	3%
NORTHWEST MINNESOTA FOUNDATI	3%	3%	3%	3%	3%	3%	2%	2%	3%	3%	3%
BELTRAMI	1%	1%	1%	-	-	1%	-	1%	1%	-	-
CLEARWATER	-	-	-	-	-	-	-	-	-	-	-
HUBBARD	-	-	-	-	1%	-	-	-	-	-	1%
KITTSO	-	-	-	-	-	-	-	-	-	-	-
LAKE OF THE WOODS	-	-	-	-	-	-	-	-	-	-	-
MAHNOMEN	-	-	-	-	-	-	-	-	-	-	-
MARSHALL	-	1%	1%	1%	-	-	-	-	-	-	-
NORMAN	-	-	-	-	-	-	-	-	1%	-	-
PENNINGTON	1%	-	-	-	-	-	-	-	1%	2%	-
POLK	-	-	-	1%	-	-	-	1%	1%	-	1%
RED LAKE	-	-	-	-	1%	-	-	-	-	-	-
ROSEAU	-	-	-	1%	-	1%	1%	-	-	1%	-
SOUTHERN MINNESOTA INITIATIVE FI	13%	12%	13%	13%	13%	13%	15%	12%	13%	13%	13%
BLUE EARTH	-	2%	1%	-	1%	1%	1%	1%	1%	1%	2%
BROWN	1%	1%	-	1%	1%	1%	1%	-	-	1%	-
DODGE	-	-	1%	-	1%	-	1%	-	1%	-	1%
FARIBAULT	1%	-	-	-	-	1%	-	1%	1%	-	-
FILLMORE	-	-	-	-	-	1%	-	-	-	-	1%
FREEBORN	1%	1%	1%	1%	1%	1%	1%	-	-	1%	-
GOODHUE	-	1%	1%	-	2%	1%	-	-	-	-	-
HOUSTON	-	-	-	1%	-	-	-	-	1%	-	-
LE SUEUR	2%	-	1%	2%	-	1%	-	1%	1%	1%	1%
MARTIN	1%	-	1%	1%	1%	-	1%	1%	1%	1%	1%
MOWER	-	1%	-	-	-	-	-	-	-	1%	-
NICOLLET	1%	-	1%	-	-	-	1%	-	-	-	-
OLMSTED	2%	2%	1%	1%	1%	2%	1%	1%	2%	1%	2%
RICE	1%	1%	1%	1%	2%	1%	2%	1%	2%	1%	1%
SIBLEY	1%	-	-	-	-	-	-	-	-	-	-
STEELE	2%	2%	2%	1%	1%	1%	1%	1%	1%	1%	1%
WABASHA	1%	-	-	-	-	1%	-	1%	1%	-	-

