



## 2020 STATE OF MANUFACTURING FALL SURVEY

Field Dates: September 8-October 8, 2020  
 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>	<u>3/20</u>	<u>9/20</u>	
28%	30%	35%	28%	28%	36%	40%	44%	57%	51%	50%	49%	43%	VERY CONFIDENT
51%	49%	49%	54%	54%	49%	48%	47%	37%	41%	43%	40%	42%	SOMEWHAT CONFIDENT
15%	16%	13%	13%	12%	13%	7%	5%	5%	5%	5%	7%	10%	NOT VERY CONFIDENT
5%	5%	4%	4%	5%	2%	3%	4%	1%	1%	1%	3%	3%	NOT AT ALL CONFIDENT
*	1%	1%	*	*	1%	1%	1%	--	1%	1%	1%	1%	DON'T KNOW/UNSURE
--	--	--	*	*	--	--	--	--	--	1%	*	*	REFUSED
<b>79%</b>	<b>78%</b>	<b>83%</b>	<b>82%</b>	<b>82%</b>	<b>84%</b>	<b>89%</b>	<b>90%</b>	<b>94%</b>	<b>93%</b>	<b>93%</b>	<b>89%</b>	<b>85%</b>	<b>TOTAL CONFIDENT</b>
<b>21%</b>	<b>21%</b>	<b>16%</b>	<b>17%</b>	<b>17%</b>	<b>15%</b>	<b>11%</b>	<b>9%</b>	<b>6%</b>	<b>6%</b>	<b>5%</b>	<b>10%</b>	<b>14%</b>	<b>TOTAL NOT CONFIDENT</b>

### Question 2

And, even though we only have a few months left, as you think about 2020 as whole, do you think this year will be one of 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>	<u>3/20</u>	<u>9/20</u>	
8%	26%	40%	32%	34%	37%	42%	32%	58%	64%	49%	27%	20%	ECONOMIC EXPANSION
34%	53%	49%	55%	46%	54%	42%	48%	32%	28%	39%	39%	40%	A FLAT ECONOMY
56%	19%	9%	10%	15%	7%	13%	15%	4%	4%	5%	24%	36%	A RECESSION
2%	2%	3%	2%	5%	3%	3%	4%	5%	4%	6%	8%	4%	DON'T KNOW/UNSURE
--	--	--	1%	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>	<u>3/20</u>	<u>9/20</u>	
41%	54%	45%	48%	27%	GOTTEN BETTER
18%	14%	15%	19%	35%	GOTTEN WORSE
39%	32%	37%	30%	35%	STAYED ABOUT THE SAME
3%	1%	2%	3%	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?

- 66% MAJOR IMPACT
  - 26% MODEST IMPACT
  - 5% MINOR IMPACT
  - 2% NO IMPACT AT ALL
  - 1% DON'T KNOW/NOT SURE
  - 1% REFUSED
- 
- 92% MAJOR/MODEST IMPACT**
  - 6% MINOR/NO IMPACT**



*Question 5*

As you look to the year-end, do you project your company's gross revenues for 2020 to increase or decrease compared to 2019, 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>	<u>3/20</u>	<u>9/20</u>	
11%	29%	30%	25%	25%	23%	25%	25%	35%	36%	29%	24%	17%	INCREASE BY MORE THAN 10%
12%	15%	21%	22%	16%	21%	19%	19%	20%	24%	30%	20%	5%	INCREASE BY LESS THAN 10%
10%	5%	2%	2%	4%	2%	2%	5%	2%	2%	2%	3%	9%	DECREASE BY LESS THAN 10%
22%	10%	5%	6%	6%	5%	4%	6%	5%	3%	4%	10%	39%	DECREASE BY MORE THAN 10%
44%	40%	41%	44%	48%	47%	47%	43%	36%	33%	32%	40%	29%	STAY THE SAME
1%	1%	2%	1%	1%	2%	1%	1%	2%	1%	2%	3%	1%	TOO SOON TO SAY/DON'T KNOW
*	*	1%	--	1%	1%	*	--	--	--	1%	*	1%	REFUSED
<b>23%</b>	<b>44%</b>	<b>51%</b>	<b>47%</b>	<b>41%</b>	<b>45%</b>	<b>45%</b>	<b>44%</b>	<b>55%</b>	<b>60%</b>	<b>59%</b>	<b>44%</b>	<b>21%</b>	<b>TOTAL INCREASE</b>
<b>32%</b>	<b>15%</b>	<b>6%</b>	<b>8%</b>	<b>9%</b>	<b>7%</b>	<b>7%</b>	<b>12%</b>	<b>7%</b>	<b>5%</b>	<b>6%</b>	<b>13%</b>	<b>48%</b>	<b>TOTAL DECREASE</b>



*Question 6*

And, as you look to the year-end, do you project your company's profitability for 2020 to increase or decrease compared to 2019, 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>	<u>3/20</u>	<u>9/20</u>	
9%	21%	21%	17%	16%	18%	14%	20%	27%	27%	23%	21%	14%	INCREASE BY MORE THAN 10%
8%	15%	18%	14%	16%	17%	16%	16%	17%	19%	22%	17%	10%	INCREASE BY LESS THAN 10%
13%	8%	6%	7%	9%	10%	4%	6%	2%	3%	4%	3%	8%	DECREASE BY LESS THAN 10%
21%	10%	5%	6%	8%	7%	5%	6%	5%	4%	5%	9%	33%	DECREASE BY MORE THAN 10%
48%	45%	48%	55%	49%	47%	60%	51%	46%	44%	43%	47%	34%	STAY THE SAME
1%	1%	2%	*	2%	1%	*	*	2%	1%	2%	2%	1%	TOO SOON TO SAY/DON'T KNOW
--	*	1%	1%	1%	*	*	--	1%	1%	1%	*	1%	REFUSED
<b>17%</b>	<b>36%</b>	<b>39%</b>	<b>31%</b>	<b>32%</b>	<b>35%</b>	<b>30%</b>	<b>36%</b>	<b>44%</b>	<b>47%</b>	<b>45%</b>	<b>38%</b>	<b>24%</b>	<b>TOTAL INCREASE</b>
<b>34%</b>	<b>17%</b>	<b>11%</b>	<b>13%</b>	<b>17%</b>	<b>17%</b>	<b>9%</b>	<b>12%</b>	<b>7%</b>	<b>7%</b>	<b>9%</b>	<b>13%</b>	<b>41%</b>	<b>TOTAL DECREASE</b>



*Question 7*

And, as you look to the year-end, do you project your company's capital expenditures for 2020 to increase or decrease compared to 2019, 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>	<u>3/20</u>	<u>9/20</u>	
9%	16%	20%	15%	17%	17%	14%	17%	15%	22%	19%	15%	17%	INCREASE BY MORE THAN 10%
10%	8%	13%	12%	11%	10%	13%	8%	8%	10%	11%	11%	8%	INCREASE BY LESS THAN 10%
12%	9%	6%	11%	6%	4%	6%	8%	4%	5%	6%	7%	10%	DECREASE BY LESS THAN 10%
25%	15%	8%	13%	14%	15%	11%	12%	8%	5%	10%	12%	24%	DECREASE BY MORE THAN 10%
43%	51%	53%	47%	50%	53%	55%	54%	63%	56%	52%	54%	40%	STAY THE SAME
2%	1%	1%	1%	1%	1%	*	2%	2%	1%	1%	2%	2%	TOO SOON TO SAY/DON'T KNOW
*	==	*	*	1%	1%	*	*	--	--	1%	*	*	REFUSED
<b>19%</b>	<b>24%</b>	<b>32%</b>	<b>27%</b>	<b>28%</b>	<b>27%</b>	<b>27%</b>	<b>25%</b>	<b>23%</b>	<b>32%</b>	<b>31%</b>	<b>26%</b>	<b>25%</b>	<b>TOTAL INCREASE</b>
<b>37%</b>	<b>24%</b>	<b>14%</b>	<b>24%</b>	<b>20%</b>	<b>19%</b>	<b>17%</b>	<b>20%</b>	<b>12%</b>	<b>11%</b>	<b>15%</b>	<b>19%</b>	<b>33%</b>	<b>TOTAL DECREASE</b>



**Questions 8-16**

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 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>
<b>(8)</b> Federal government programs resulting from the pandemic					
<b>9/20</b>	14%	27%	39%	31%	<b>5.5</b>
<b>(9)</b> State government programs resulting from the pandemic					
<b>9/20</b>	16%	26%	39%	30%	<b>5.5</b>
<b>(10)</b> The costs of health care coverage					
<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>2019</b>	32%	58%	26%	12%	<b>7.5</b>
<b>2018</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>2014</b>	36%	59%	20%	20%	<b>7.2</b>
<b>2013</b>	44%	67%	17%	14%	<b>7.7</b>
<b>2012</b>	36%	68%	17%	13%	<b>7.7</b>
<b>2011</b>	43%	71%	17%	8%	<b>8.2</b>
<b>2010</b>	42%	68%	17%	13%	<b>7.8</b>
<b>2008</b>	36%	64%	21%	13%	<b>7.7</b>
<b>(11)</b> Costs of employee salaries and benefits					
<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>2019</b>	11%	29%	46%	22%	<b>5.9</b>
<b>2018</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>2014</b>	4%	18%	46%	37%	<b>5.0</b>
<b>2013</b>	7%	19%	45%	34%	<b>5.1</b>
<b>2012</b>	3%	13%	47%	37%	<b>4.9</b>
<b>2011</b>	5%	15%	49%	33%	<b>5.0</b>
<b>2010</b>	6%	16%	46%	34%	<b>5.0</b>
<b>2008</b>	7%	18%	49%	32%	<b>5.3</b>

*\*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>1-4</u>	<u>MEAN</u>
<b>(12)</b> Attracting qualified workers					
<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>2019</b>	21%	46%	33%	19%	<b>6.7</b>
<b>2018</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>
<b>2014</b>	10%	34%	35%	30%	<b>5.8</b>
<b>2013</b>	9%	30%	32%	35%	<b>5.4</b>
<b>2012</b>	11%	31%	32%	37%	<b>5.5</b>
<b>2011</b>	4%	14%	37%	45%	<b>4.6</b>
<b>2010</b>	8%	19%	27%	51%	<b>4.4</b>
<b>2008</b>	8%	22%	31%	45%	<b>4.8</b>

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

<b>(13)</b> Retaining qualified workers					
<b>9/20</b>	15%	36%	34%	29%	<b>5.9</b>
<b>3/20</b>	12%	33%	30%	35%	<b>5.5</b>
<b>2019</b>	13%	37%	35%	26%	<b>6.0</b>
<b>2018</b>	15%	36%	33%	30%	<b>5.8</b>

<b>(14)</b> Economic and global uncertainty					
<b>9/20</b>	21%	39%	46%	14%	<b>6.6</b>
<b>3/20</b>	20%	40%	39%	20%	<b>6.5</b>
<b>2019</b>	6%	16%	48%	34%	<b>5.1</b>
<b>2018</b>	6%	20%	45%	35%	<b>5.1</b>
<b>2017</b>	7%	17%	42%	40%	<b>4.8</b>
<b>2016</b>	11%	29%	38%	32%	<b>5.6</b>
<b>2015</b>	12%	29%	43%	28%	<b>5.8</b>
<b>2014</b>	11%	31%	46%	24%	<b>6.0</b>

<b>(15)</b> Getting your products to market					
<b>9/20</b>	8%	15%	29%	54%	<b>4.1</b>
<b>3/20</b>	3%	11%	31%	56%	<b>4.0</b>
<b>2019</b>	3%	10%	25%	63%	<b>3.6</b>
<b>2018</b>	6%	15%	30%	54%	<b>4.2</b>
<b>2017</b>	5%	12%	26%	62%	<b>3.8</b>
<b>2016</b>	3%	12%	19%	68%	<b>3.4</b>
<b>2015</b>	5%	14%	27%	58%	<b>4.0</b>

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



	<u>10</u>	<u>8-10</u>	<u>5-7</u>	<u>1-4</u>	<u>MEAN</u>
<b>(16)</b> Developing future leaders					
<b>9/20</b>	11%	28%	43%	28%	<b>5.6</b>
<b>3/20</b>	8%	23%	43%	31%	<b>5.2</b>
<b>2019</b>	8%	23%	44%	31%	<b>5.3</b>
<b>2018</b>	8%	25%	40%	34%	<b>5.2</b>
<b>2017</b>	12%	26%	38%	35%	<b>5.3</b>
<b>2016</b>	6%	12%	27%	60%	<b>3.7</b>
<b>2015</b>	4%	13%	32%	54%	<b>3.9</b>

*\*Changed from 2017: Current and future leaders*

<b>(17)</b> Cyber security					
<b>9/20</b>	11%	30%	37%	32%	<b>5.6</b>
<b>3/20</b>	9%	24%	39%	37%	<b>5.2</b>





**Question 18**

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

<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>3/20</u>	<u>9/20</u>	
48%	43%	40%	38%	18%	19%	33%	33%	UNFAVORABLE BUSINESS CLIMATE
21%	29%	26%	34%	49%	48%	40%	32%	ATTRACTING AND RETAINING A QUALIFIED WORKFORCE
31%	41%	34%	36%	36%	30%	31%	26%	COST OF HEALTH CARE INSURANCE
29%	20%	15%	18%	34%	28%	24%	20%	INCREASING COSTS OF ENERGY AND MATERIALS FOR YOUR PRODUCTS
--	--	--	--	--	--	--	19%	GETTING OPERATIONS UP AND RUNNING/BACK TO NORMAL
--	--	--	--	--	--	8%	9%	LACK OF CLEAR DIRECTION/PATH FORWARD
--	--	--	--	--	3%	2%	2%	REGULATIONS/GOVERNMENT REGULATIONS
--	--	--	--	--	--	2%	*	CORONAVIRUS/COVID-19
--	--	--	--	--	1%	2%	--	COMPETITION/FOREIGN COMPETITION
3%	4%	3%	3%	2%	3%	1%	3%	OTHER
*	1%	1%	1%	*	2%	2%	1%	DON'T KNOW/NOT SURE/NONE
*	*	*	--	--	1%	*	--	REFUSED
--	--	2%	--	1%	--	*	1%	NONE/NONE OF THE ABOVE

**Question 19**

Overall, what impact would you say the COVID-19 outbreak has had on your business, if any at all?

- 35% MAJOR IMPACT
- 35% MODEST IMPACT
- 20% MINOR IMPACT
- 9% NO IMPACT AT ALL
- \* DON'T KNOW/NOT SURE
- \* REFUSED
  
- 70% MAJOR/MODEST IMPACT**
- 29% MINOR/NO IMPACT**



**Question 20**

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>2018</u>	<u>2019</u>	<u>3/20</u>	<u>9/20</u>	
75%	82%	74%	61%	53%	57%	59%	NEW CUSTOMERS AND MARKETS
--	--	--	38%	49%	45%	27%	INCREASING PRODUCTIVITY AND ELIMINATING WASTE
40%	51%	41%	35%	27%	26%	24%	NEW PRODUCTS
--	--	--	27%	20%	22%	16%	BETTER STRATEGIC PLANNING AND IMPLEMENTATION
25%	27%	24%	22%	18%	14%	15%	DEVELOPING COMPANY MANAGERS AND LEADERS
--	--	--	--	--	--	2%	GOVERNMENT REGULATIONS/GOVERNMENT
--	--	--	--	--	*	1%	RETAINING EMPLOYEES
--	--	--	--	--	2%	1%	ECONOMY/ECONOMIC CONCERNS
6%	6%	6%	2%	1%	2%	3%	OTHER
1%	5%	3%	1%	2%	2%	3%	DON'T KNOW/NOT SURE
*	*	--	*	1%	--	2%	REFUSED

**Question 21**

For the entire year of 2020, do you expect an increase investment in any of the following areas?

<u>2018</u>	<u>2019</u>	<u>3/20</u>	<u>9/20</u>	
57%	58%	62%	51%	GROWING REVENUE AND PROFITABILITY
30%	32%	37%	48%	EXPANDING SALES WITHIN THE UNITED STATES/NEW CUSTOMERS
55%	54%	62%	44%	MAXIMIZING PRODUCTIVITY
30%	37%	38%	30%	SYSTEMS, TECHNOLOGY AND AUTOMATION
27%	37%	33%	29%	STAFF DEVELOPMENT AND CULTURE
--	--	28%	24%	CYBER AND INFORMATION SECURITY
10%	13%	11%	10%	EXPANDING SALES GLOBALLY
--	--	7%	5%	OBTAIN ISO CERTIFICATION
*	*	*	--	OTHER
8%	11%	9%	14%	NONE OF THE ABOVE
1%	2%	1%	1%	DON'T KNOW/REFUSED



**Question 22**

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

<b>2008</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>3/20</b>	<b>9/20</b>	
18%	14%	17%	22%	22%	29%	27%	26%	26%	24%	22%	21%	18%	VERY DIFFICULT
36%	26%	28%	37%	38%	38%	44%	40%	42%	46%	50%	47%	44%	SOMEWHAT DIFFICULT
22%	24%	25%	26%	19%	19%	13%	16%	15%	15%	14%	17%	13%	NOT TOO DIFFICULT
21%	31%	26%	13%	17%	12%	14%	12%	14%	13%	12%	12%	20%	NOT DIFFICULT AT ALL
1%	1%	2%	1%	3%	1%	2%	4%	3%	2%	2%	2%	4%	DON'T KNOW
1%	4%	3%	2%	1%	*	1%	1%	--	*	1%	1%	1%	REFUSED
<b>55%</b>	<b>40%</b>	<b>45%</b>	<b>58%</b>	<b>60%</b>	<b>67%</b>	<b>71%</b>	<b>67%</b>	<b>68%</b>	<b>70%</b>	<b>71%</b>	<b>69%</b>	<b>62%</b>	<b>TOTAL DIFFICULT</b>
<b>43%</b>	<b>55%</b>	<b>50%</b>	<b>39%</b>	<b>36%</b>	<b>32%</b>	<b>27%</b>	<b>29%</b>	<b>29%</b>	<b>28%</b>	<b>26%</b>	<b>29%</b>	<b>34%</b>	<b>TOTAL NOT DIFFICULT</b>

**Question 23**

Is your company using automation more or less than you expected at the beginning of this year, before the COVID-19 outbreak?

- 25% USING AUTOMATION MORE THAN EXPECTED
- 20% USING AUTOMATION LESS THAN EXPECTED
- 50% USING ABOUT AS MUCH AUTOMATION AS EXPECTED
  
- 5% DON'T KNOW
- \* REFUSED



*Question 24*

**(ASKED IF USE AUTOMATION MORE/LESS, N=180)** Would you say your company's automation use changes are a result of the global pandemic or are they not related?

**AMONG AUTOMATION USERS:**

- 37% YES, RESULT OF PANDEMIC
- 63% NO, NOT RELATED

**AMONG TOTAL SAMPLE:**

- 17% YES, RESULT OF PANDEMIC
- 28% NO, NOT RELATED

*Question 25*

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

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

*Question 26*

How has the impact of COVID-19 and the global pandemic affected your succession plan? Has it accelerated the planning, delayed the planning, or something else?

- 10% ACCELERATED THE SUCCESSION PLANNING
- 20% DELAYED THE SUCCESSION PLANNING
- 34% NO EFFECT/THE SAME
- 1% SOMETHING ELSE
- 27% DON'T HAVE A PLAN FOR SUCCESSION
  
- 6% DON'T KNOW/NOT SURE
- 2% REFUSED



*Question 27*

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

<b><u>3/20</u></b>	<b><u>9/20</u></b>	
35%	29%	GREAT WORK ENVIRONMENT
12%	15%	WORK-LIFE BALANCE
13%	15%	INDUSTRY LEADER
11%	8%	COMPETITIVE SALARY
5%	5%	COMPANY MISSION
5%	5%	CAREER GROWTH
--	5%	VALUES EMPLOYEE SAFETY
--	5%	ALL OF THE ABOVE
5%	3%	GREAT BENEFITS
7%	3%	FLEXIBLE SHIFTS
--	4%	OTHER
5%	1%	DON'T KNOW
1%	2%	REFUSED

*Question 28*

Thinking about your company's strategic plan for growth, has the impact of COVID-19 and the global pandemic changed your original plan for 2020 for growth or recovery?

59%	YES
40%	NO
*	DON'T KNOW
--	REFUSED



*Question 29*

On another topic, which of the following should the Governor and State Legislature do to support small businesses and manufacturing?

- 32% OFFER TAX INCENTIVES
- 26% EASE/REFORM REGULATIONS
- 15% MAKE DIRECT INVESTMENTS IN SMALL MANUFACTURERS THROUGH THE GROWTH ACCELERATION PROGRAM
- 13% MAKE DIRECT INVESTMENTS TO HELP CREATE AND PRESERVE JOBS
- 3% ALL OF THE ABOVE/ANY OF THEM
- 5% SOMETHING ELSE
  
- 5% DON'T KNOW
- 2% REFUSED



**Question 30**

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

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

**Question 31**

What are your annual business revenues?

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



**Question 32**

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

<b>2008</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>3/20</b>	<b>9/20</b>	
16%	14%	16%	30%	13%	13%	14%	19%	14%	16%	23%	13%	25%	PROCESS MANUFACTURING
37%	29%	22%	17%	26%	25%	18%	26%	12%	18%	24%	16%	14%	PRECISION MANUFACTURING
13%	16%	15%	13%	14%	17%	20%	17%	20%	16%	15%	14%	12%	METAL FABRICATION
12%	15%	13%	10%	12%	30%	14%	18%	11%	10%	12%	9%	6%	PRINTING
--	--	--	--	--	--	--	--	--	5%	4%	5%	6%	AN ORIGINAL EQUIPMENT MANUFACTURER, OEM
--	--	--	--	--	--	--	--	--	--	--	2%	6%	RETAIL/RETAIL SALES
4%	5%	7%	6%	4%	5%	5%	4%	5%	7%	5%	5%	3%	CONSTRUCTION
--	--	--	--	--	--	*	--	--	3%	1%	4%	3%	PLASTICS
--	--	--	--	--	--	3%	--	--	2%	2%	2%	3%	FOOD MANUFACTURING/FOOD AND BEVERAGE INDUSTRY
--	--	--	--	--	--	--	--	--	--	--	1%	*	CABINET MANUFACTURING/CUSTOM CABINETS
--	--	--	--	--	--	--	--	--	--	1%	--	2%	AUTOMOTIVE
--	--	--	--	--	--	--	--	--	--	--	--	2%	SERVICE/HOSPITALITY
--	--	--	--	--	--	--	--	--	1%	1%	1%	2%	ANIMAL/AGRICULTURAL MANUFACTURING
--	--	--	--	--	--	--	--	--	--	--	1%	2%	SIGN MANUFACTURING
4%	3%	6%	5%	1%	5%	3%	4%	3%	4%	4%	3%	2%	ELECTRONICS COMPONENTS
--	--	--	--	--	--	--	--	--	7%	3%	2%	2%	WOODWORKING/WOOD MANUFACTURING
--	--	--	--	--	--	--	--	--	--	--	--	1%	GRAPHIC DESIGN/ART
--	--	--	--	--	--	--	--	--	--	--	--	1%	REPAIRS/MAINTENANCE
--	--	--	--	--	--	--	--	--	7%	2%	2%	1%	TEXTILE MANUFACTURING/ EMBROIDERY/APPAREL
--	--	--	--	--	--	--	--	--	--	--	--	1%	CONSULTING
3%	2%	3%	2%	--	2%	1%	2%	2%	1%	1%	2%	*	INFORMATION TECHNOLOGY, IT
--	--	--	--	--	--	--	--	--	--	1%	--	*	RECYCLING
--	1%	3%	3%	7%	4%	17%	8%	31%	3%	3%	17%	4%	SOMETHING ELSE
1%	--	*	--	1%	--	*	1%	--	--	--	*	*	DON'T KNOW
*	1%	*	1%	1%	*	4%	1%	*	--	--	--	*	REFUSED





**Question 33**

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>	<u>3/20</u>	<u>9/20</u>	
--	*	--	*	1%	*	*	1%	*	--	--	*	*	LESS THAN 1 YEAR
3%	5%	2%	1%	1%	2%	1%	5%	3%	3%	2%	3%	3%	1 - 3 YEARS
3%	8%	6%	5%	4%	1%	4%	6%	7%	6%	4%	5%	4%	4 - 6 YEARS
10%	13%	11%	12%	10%	6%	5%	7%	9%	7%	10%	11%	7%	7 - 10 YEARS
13%	13%	9%	11%	14%	10%	12%	11%	8%	10%	9%	8%	8%	11 - 15 YEARS
71%	60%	71%	69%	70%	81%	74%	69%	73%	73%	75%	73%	77%	16 YEARS OR MORE
--	--	*	*	--	*	*	--	--	--	--	*	--	DON'T KNOW
*	--	--	*	1%	--	4%	1%	--	*	*	--	*	REFUSED
<b>29%</b>	<b>39%</b>	<b>28%</b>	<b>29%</b>	<b>30%</b>	<b>19%</b>	<b>22%</b>	<b>30%</b>	<b>27%</b>	<b>27%</b>	<b>25%</b>	<b>27%</b>	<b>23%</b>	<b>TOTAL LESS THAN 15 YEARS</b>
<b>71%</b>	<b>60%</b>	<b>71%</b>	<b>69%</b>	<b>70%</b>	<b>81%</b>	<b>74%</b>	<b>69%</b>	<b>73%</b>	<b>73%</b>	<b>75%</b>	<b>73%</b>	<b>77%</b>	<b>16 YEARS OR MORE</b>

**Question 34**

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>	<u>3/20</u>	<u>9/20</u>	
5%	3%	3%	4%	3%	1%	3%	5%	8%	6%	6%	7%	5%	18 - 34
13%	15%	11%	9%	10%	7%	7%	11%	10%	12%	10%	12%	14%	35 - 44
37%	37%	35%	30%	30%	29%	26%	23%	21%	22%	20%	22%	20%	45 - 54
28%	29%	32%	35%	35%	40%	37%	37%	36%	37%	39%	34%	37%	55 - 64
14%	15%	17%	22%	20%	22%	19%	18%	17%	20%	22%	24%	20%	65+
2%	2%	3%	1%	2%	1%	8%	6%	8%	3%	4%	1%	3%	REFUSED



**Question 35**

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>	<u>3/20</u>	<u>9/20</u>	
76%	83%	86%	84%	84%	86%	81%	80%	76%	76%	80%	80%	79%	MALE
24%	17%	14%	16%	16%	14%	19%	20%	24%	24%	20%	20%	21%	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>	<u>3/20</u>	<u>9/20</u>	
38%	50%	43%	42%	41%	40%	40%	40%	40%	38%	39%	48%	45%	OWNER
29%	30%	33%	31%	28%	36%	26%	28%	22%	22%	27%	20%	20%	PRESIDENT/CEO
16%	9%	13%	17%	12%	14%	9%	13%	20%	27%	19%	19%	18%	MANAGER/GM
2%	*	2%	1%	*	*	3%	2%	4%	4%	8%	9%	11%	MANAGEMENT TEAM MEMBER/DIRECTOR
2%	*	*	*	*	*	--	--	--	4%	3%	2%	2%	GENERAL OFFICE STAFF/SALES/ADMIN
7%	6%	5%	4%	11%	7%	--	--	--	3%	1%	--	2%	VICE PRESIDENT
6%	5%	5%	4%	7%	3%	1%	2%	15%	2%	2%	3%	3%	OTHER