

# **The Northland Works Employer Survey Final Report**

**Prepared for**

**The City of Duluth, Minnesota  
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**by**

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# I. Executive Summary

The Northland Works (TNW) is a collaborative project of The Duluth Workforce Council, the Northeast Minnesota Workforce Investment Board, and the Northwest Wisconsin Workforce Investment Board. TNW's mission is to build a skilled, diverse, and adaptable workforce to meet existing labor market needs, the changing needs of a dynamic market, and to stimulate economic development and growth. Over the past two years, TNW's main efforts have focused on a public awareness campaign aimed at increasing the community's understanding of the pending labor force shortage that area employers face. In order to proceed with additional targeted activities, TNW needed to conduct research among employers to help guide the development of a strategic plan to meet the area's workforce needs. The Duluth Superior Area Community Foundation is supporting this research through a \$10,000 grant. Additional funding was provided for the study by Minnesota Power, Lake Country Power, and Xcel Energy Corporation. Gene Kroupa & Associates, LLC, a marketing research firm, was selected to conduct a survey of the area's businesses. This report summarizes the results of that survey.

## A. Objectives

The main objective of the survey was twofold: 1) identify what actions and activities employers want TNW to take to help them, and 2) learn how best to communicate with the employers. Key questions we wanted the survey to answer include:

1. What is employers' level of familiarity with TNW?
2. What are the suggested keys to and methods for attracting workers to the area?
3. What types of jobs or positions do employers need to fill now and in the future?
4. What are some specific occupations or critical skills that employers require?
5. What action areas and activities should TNW focus on in helping attract workers?
6. How would employers like to work with TNW in implementing these action areas?
7. What ways are acceptable to employers for helping TNW fund these efforts?
8. How would businesses like to be kept informed about TNW activities?

## B. Methodology

GKA conducted a mail survey of companies and organizations located in Aitkin, Ashland, Bayfield, Burnett, Carlton, Cook, Douglas, Iron, Itasca, Koochiching, Lake, Price, Rusk, Saint Louis, Sawyer, Taylor and Washburn counties. Excluded from the sample were churches, small farms, franchises, most food establishments, elementary and high schools, and others with less than five employees. The questionnaire was drafted by GKA staff and refined in conjunction with the TNW committee coordinated by Donald Hoag, executive director of the Duluth Workforce Council, Inc.

The survey packets consisted of a No. 10 envelope addressed to the name of the president, director, manager, owner or other contact person; a cover letter signed by the executive directors of the Duluth Workforce Council, Inc., the Northwest Wisconsin Workforce Investment Board and Northeast Minnesota Workforce Development Board, and a No. 9 postage-paid business reply envelope addressed to GKA. TNW stationery was used for the survey packets. A total of 3,637 packets were mailed on December 11, 2007, plus an additional 444 on December 17, 2007. A total of 261 usable questionnaires were returned by employers. The maximum sampling error is  $\pm 6.1\%$  at the 95% confidence level and  $\pm 5.1\%$  at the 90% confidence level.

GKA audited, coded and entered the data. The analysis included calculating descriptive statistics, such as the mean and median, as well as crosstabulating by the demographics to test for differences and identify any variations by subgroups. The sample size precluded doing any segmentation analysis by business sector. However, the findings were quite consistent across all sectors surveyed. The data tables, verbatim comments and survey questionnaire are included in the Appendix.

### **C. Description of the Respondents**

The responding businesses and organizations were primarily locally owned and have less than 50 employees. However, one in 10 respondents reported 100 or more employees. Usually, the CEO, president, other officer or owner completed the questionnaire. Most counties in the survey area were represented by at least one employer. Six in 10 of the responding employers are located in Minnesota, while more than one-third are sited in Wisconsin and the balance indicated being in both states. Likewise, the business sectors or main industries responding provided a cross-section that included: manufacturing, healthcare, service, government, building trades, non-profits, transportation, retail, forestry/agriculture, finance, hospitality, energy, education, and technology.

### **D. Conclusions**

Conclusions that can be drawn from analysis of the data include:

1. There is a general lack of familiarity with TNW that indicates a need to do more educational work among area businesses and organizations. More than three-quarters of the respondents indicated that they were not all familiar with The Northland Works prior to receiving the questionnaire.
2. The keys to attracting needed workers to this area cited by employers include: good wages/salary/benefits, employment opportunities, affordable housing, good schools/educational opportunities, and recreation/entertainment.
3. The main methods that employers now use for attracting workers include: advertising, pay/benefits, word of mouth and providing an attractive work environment/culture.

4. The types of jobs that employers now have open and will need to fill in the future vary greatly, depending largely on the industry type. As a result, TNW cannot take a one size fits all approach to helping employers meet their needs.
5. Primary occupations or skills that employers are looking for include: customer service, equipment operators, healthcare, commercial drivers, welding, accountants and a host of other positions, skills and certifications.
6. The main action areas for TNW to consider that employers think are important to their business or organization include: connect businesses with post-secondary institutions, identify and publicize critical employer needs, promote career opportunities for residents, connect businesses with local K-12 schools, and educate employers about future trends and issues. Other activities respondents suggested TNW consider specifically to attract workers include: focus on reaching potential employees, provide services/liaison to businesses/employees, and focus on business development.
7. Employers would be most willing to work with TNW in implementing action areas by: offering apprenticeships or internships, working with teachers, providing classroom speakers, hosting student groups/tours, and being a member of an advisory committee.
8. Ways that TNW should get funding to attract needed workers to this area that are acceptable to employers include: request economic development funds, create a foundation to support efforts, charge individual businesses for services, and get donations from companies.
9. The best methods for informing employers about TNW activities include: a monthly or quarterly e-mail newsletter, articles in the newspaper, a monthly or quarterly mail newsletter, and put information on the TNW Web site.

## **E. Recommendations**

In preparing the work plan for TNW's second phase, we offer these recommendations for your consideration:

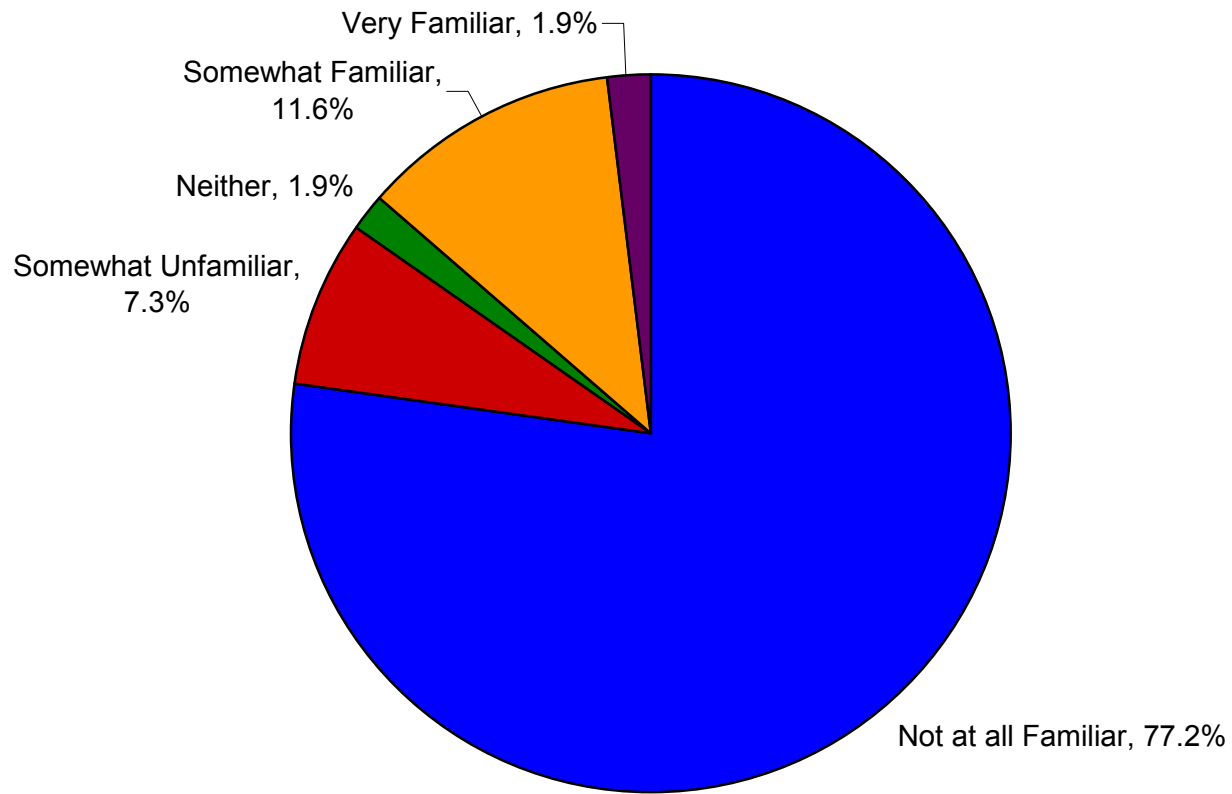
1. Develop and execute an information campaign to create awareness and understanding of TNW's mission among the region's employers.
2. Establish an advisory committee composed of area employers, educators, unions and TNW representatives to create and implement a program for increasing connectivity between businesses and schools.
3. Put priority in the strategic planning process on retention of current workers on a sector by sector basis rather than focusing on attracting individuals from outside the region. Recruitment efforts should be targeted to graduates of area high schools, as well as from 2-year and 4-year colleges and universities.

4. Establish a clearinghouse of information that employers can tap into to make sure that their pay and benefits package is competitive, as well as provide continuing education, training and apprenticeship opportunities for their employees. Offer both free and fee for service options for employers who want to use databases and programs supplied by TNW's clearinghouse.
5. Initiate an aggressive grant writing effort to request economic development funds under the supervision of an advisory committee. This effort might include the establishment of a separate foundation to process funds, including donations from companies.
6. Use an integrated communication approach involving monthly or quarterly e-mail and paper newsletters to keep employers posted on TNW's activities. At the same time, use the mass media – primarily newspaper articles – and presentations at service club meetings to supplement the mailings.
7. Hold regular informal breakfast or lunch meetings hosted by area employers to get feedback about current efforts and ideas for new actions TNW should take related to workforce development.
8. Share the findings and recommendations of this survey with area employers and invite their reaction and suggestions. When TNW initiates actions directly attributable to the survey's findings, be sure to note that they are being done in response to the employers' feedback.

## II. Results

The results presented below are based on our analysis of the data provided by 261 respondents, representing employers in seven counties in northeast Minnesota and 10 counties in northwest Wisconsin. Unless otherwise indicated, the percentages reported below are based on the responses from respondents who provided a definite answer and do not reflect individuals who said “don’t know” or otherwise did not supply an answer because the question did not apply to them. Key statistically significant results ( $p \leq 0.05$ ) for each variable by the demographics are reported. Keep in mind that the significance level does not describe the strength of the relationship between variables. Measures of association, or effect size, such as  $\eta^2$  in the ANOVA tables, can be used to determine the strength of each particular relationship. These figures can be found in the data tables section.

**Chart 1: Familiarity with The Northland Works**

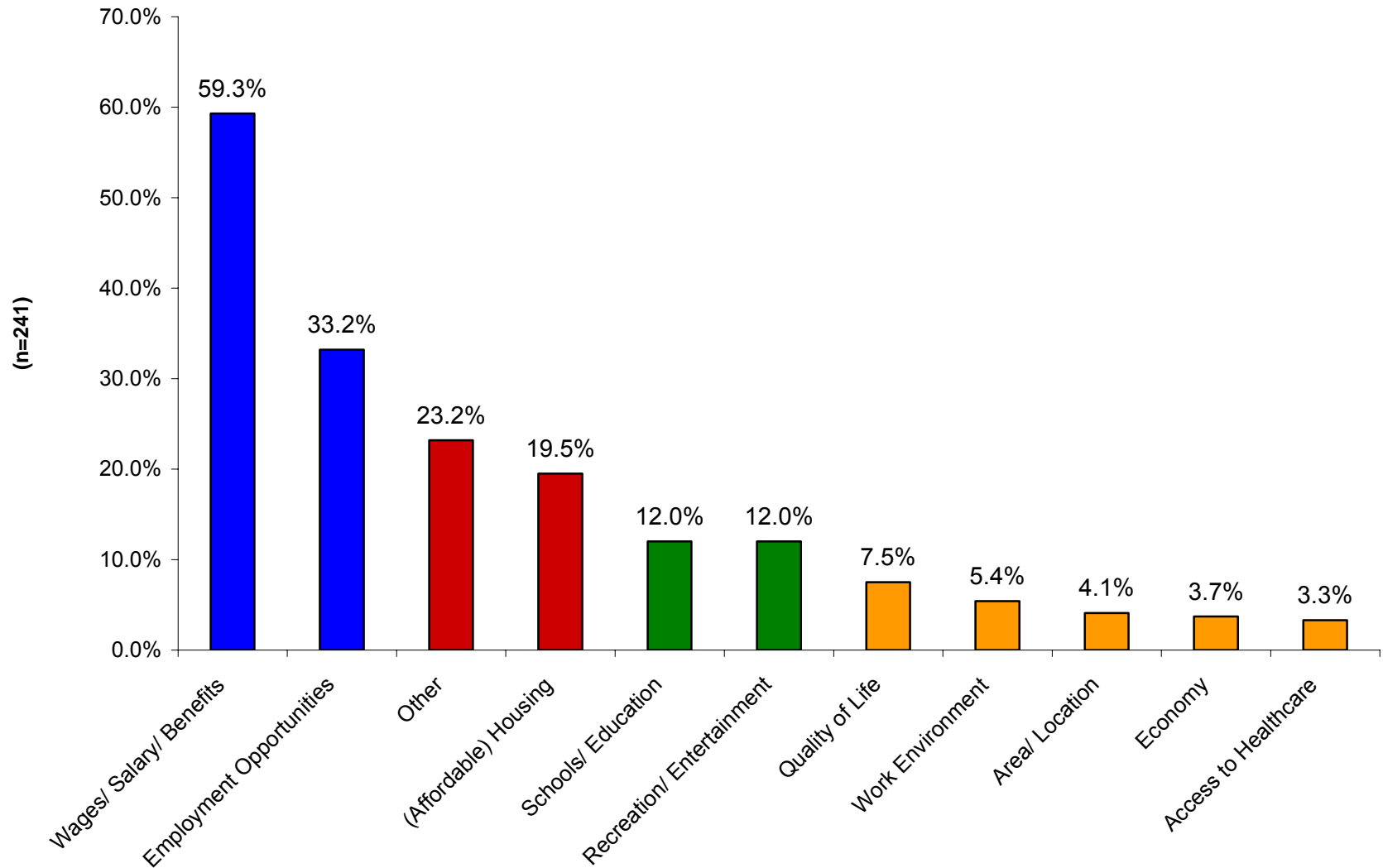


(n=259)

**Q1. Prior to receiving this questionnaire, what was your level of familiarity with The Northland Works?**

More than three-quarters (77.2%) of respondents indicated that they were not at all familiar with The Northland Works prior to receiving the questionnaire. The remaining one-quarter were somewhat familiar (11.6%), somewhat unfamiliar (7.3%), very familiar (1.9%), or neither familiar nor unfamiliar (1.9%). This result is not unexpected, because TNW targeted its initial communication efforts at the general public to make them aware of the pending labor shortage in the area. However, the finding does confirm that the next action step for TNW to consider is a campaign focused primarily on employers.

### Chart 2: Keys to Attracting Workers to This Area



**Q2. Please finish these sentences with a few words of your own:**

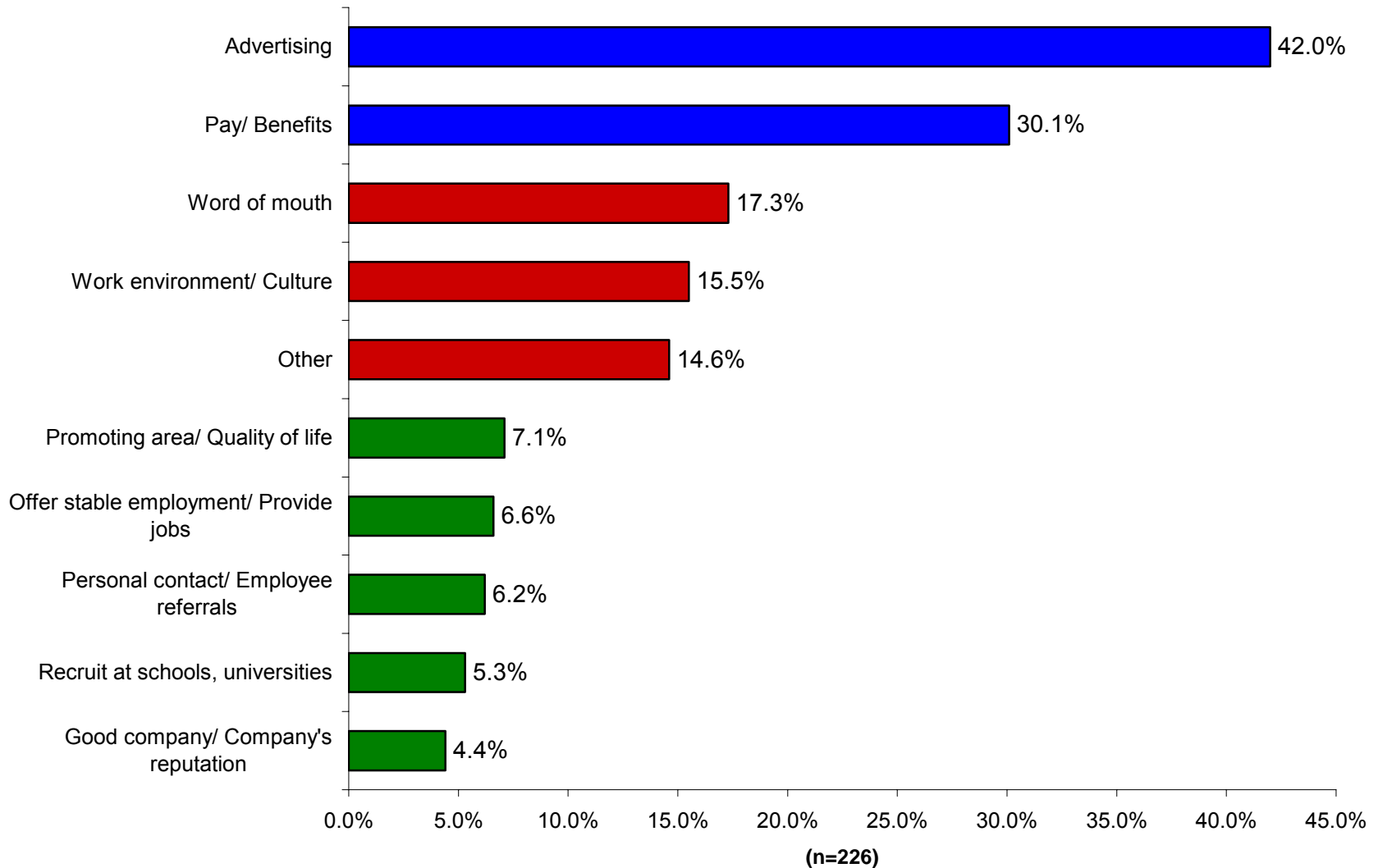
**Q2a. The keys to attracting needed workers to this area are...**

GKA coded the verbatim answers provided by the respondents into categories. Six in 10 (59.3%) respondents mentioned the importance of offering good wages and/or benefits to potential workers. One-third (33.2%) of respondents highlighted the need for employment opportunities (including job availability, stability and advancement opportunities) in the area to attract workers. Two in 10 (19.5%) respondents said that having affordable housing available is key to bringing workers to the area. Respondents also focused on the quality of schools or educational opportunities (12.0%), recreation, entertainment, nightlife, etc. (12.0%), quality of life (7.5%), work environment (5.4%), the area itself or location (4.1%), economy (3.7%), and access to healthcare (3.3%), along with a host of other factors (23.2%). While selected comments are highlighted below, a review of all answers given to this question found in Appendix A is recommended.

Respondents finished this sentence in many ways, including:

- *Employers offering decent living wages & benefits, good schools, advertising quality of life in Duluth.*
- *Adequate housing, schools, employment opportunities for both if married.*
- *Interesting work, good pay and benefits, affordable housing, good schools and healthcare facilities.*
- *Attractive community amenities (shopping, recreation, etc.); continuing education opportunities; affordable housing.*
- *The economy, growth and education.*
- *A better emphasis on attracting and retaining businesses to employ qualified workers.*
- *Community services located close to the work location, good jobs with good employers.*
- *Jobs that one can use to meet the needs of a family (level of income).*
- *Offering good wages and attractive business climates.*
- *To change the image of the region by offering a broader range of job opportunities.*
- *To provide jobs that offer good wages with the opportunity to advance and receive good benefits.*
- *Compensation, benefits and a secure job placement.*
- *Decent wages & good schools for their families.*
- *Facilitate a higher standard of living – good wages, good schools, safe communities.*
- *Living-wage jobs, emphasize outdoor recreational opportunities.*
- *Pay better than average, have good benefits, treat your employees well & have annual reviews.*
- *Low taxes, so we can pay higher wages.*
- *Stability & good pay.*
- *“Cool downtowns,” great recreational activities, flexible work schedules.*
- *An optimistic attitude by the investment community.*

**Chart 3: Main Methods Used for Attracting Workers**



**Q2. Please finish these sentences with a few words of your own:**

**Q2b. The main methods we use for attracting workers include...**

Four in 10 (42.0%) respondents said they use advertising in some form to attract workers and pay and benefits were mentioned by 30.1% of respondents. Word of mouth (17.3%) and work environment or culture (15.5%) are also common methods used by respondents. Fewer people mentioned promoting the area and quality of life (7.1%), offering stable employment and providing jobs (6.6%), personal contact and employee referrals (6.2%), recruiting at schools and/or universities (5.3%), and their company's reputation (4.4%), along with 14.6% of respondents mentioning some other method. Again, while this question was asked in an open-ended form, we coded the responses in order to more easily gauge the methods being used most often, and recommend a thorough review of all comments in Appendix A.

Examples of responses to this question include:

- *Advertising job service, employee referrals.*
- *County website, local and regional newspapers, trade journals.*
- *Job fairs, offering competitive wage/benefit package.*
- *Word of mouth, contact colleges, ads.*
- *A reputation for being fair and a reliable living wage.*
- *Competitive wages & benefits, and positive work culture.*
- *Decent living wage, decent benefits, continuing education.*
- *Networking and personal referrals.*
- *Housing still affordable. Fishing, hunting right out your back door.*
- *Stressing a positive work environment with less stress than urban areas.*
- *Favorable daily work environment.*
- *Good relationships with local schools and reputation as a long standing good place to work.*
- *Steady employment.*
- *Challenging positions with the opportunity to learn and grow, competitive wages and excellent benefits.*
- *Employment fairs, advertising & brochures, web info.*
- *Newspaper ads, Minnesota Workforce, Monster.com, CareerBuilder, internal postings.*
- *Posting job openings in various newspapers & sending postings to various organizations.*
- *Competitive wages, flexible work schedule, generous benefits, good work environment.*
- *Have a clean, attractive workplace, good pay & fun environment to work in.*
- *Nice community to live in.*
- *Telling them about our great outdoor activities, quality of life, promoting our education system, and offering competitive wage & benefit packages.*
- *Providing professional development & one-on-one (hands-on) learning opportunities.*

**Q3. Please list the types of jobs or positions that you now have open, and those that you expect to have a need to fill in the future. Be as specific as possible in describing the jobs or positions.**

Positions that are currently open or will need to be filled in the future varied greatly, and depend largely on the industry of the respondent's company or organization. Because of this variation, the verbatim responses were split by industry in the analysis tables. A thorough review of the positions listed in Appendix A is recommended. Examples of positions by industry are:

Building Trades

Carpenters  
Construction Laborers  
Crane Operators  
Laborer  
Skid Steer Operators

Finance

Assistant Cashier  
Customer Service Agents  
Loan Officers  
Operations Manager  
Teller

Healthcare

Emergency Medical Techs  
Family Practice Physicians  
Laboratory Technicians  
Nurses (CNAs, LPNs, RNs)  
Pharmacists

Education

Basic Skills Instructor  
Dean  
Driving Instructor  
Nursing Instructors  
Tech. Services Professionals

Forestry/Agriculture

Salespersons  
Equipment Operator  
Greenhouse Workers  
Process Operator  
Truck Driver

Hospitality

Cook  
Electrical Technician  
Housekeeper  
Maintenance Worker  
Snow Plow Operator

Energy

Brush Crew Laborer  
Engineers  
Environmental Specialist  
GIS Mapping Coordinator  
Project Manager

Government

Accountant  
Court Clerk  
Deputy Medical Examiner  
Deputy Sheriff  
Social Worker

Manufacturing

Draftsmen  
Electrician  
Machinists  
Mechanical Engineer  
Salespersons

Non-Profit

Administrative Assistant  
Career Specialist  
Community Initiatives Officer  
Marketing Director  
Temporary Advocate

Other

Account Manager (Sales)  
CAD Technician  
Crane Operator  
Editor  
Production Assistant

Retail

General Manager  
Mechanic/Tech for Boats,  
ATVs, Snowmobile  
Receptionist  
Salesperson

Service

Civil Engineers  
Technicians  
Class A Auto Tech/Driver  
Veterinarian Assistant  
Salespeople

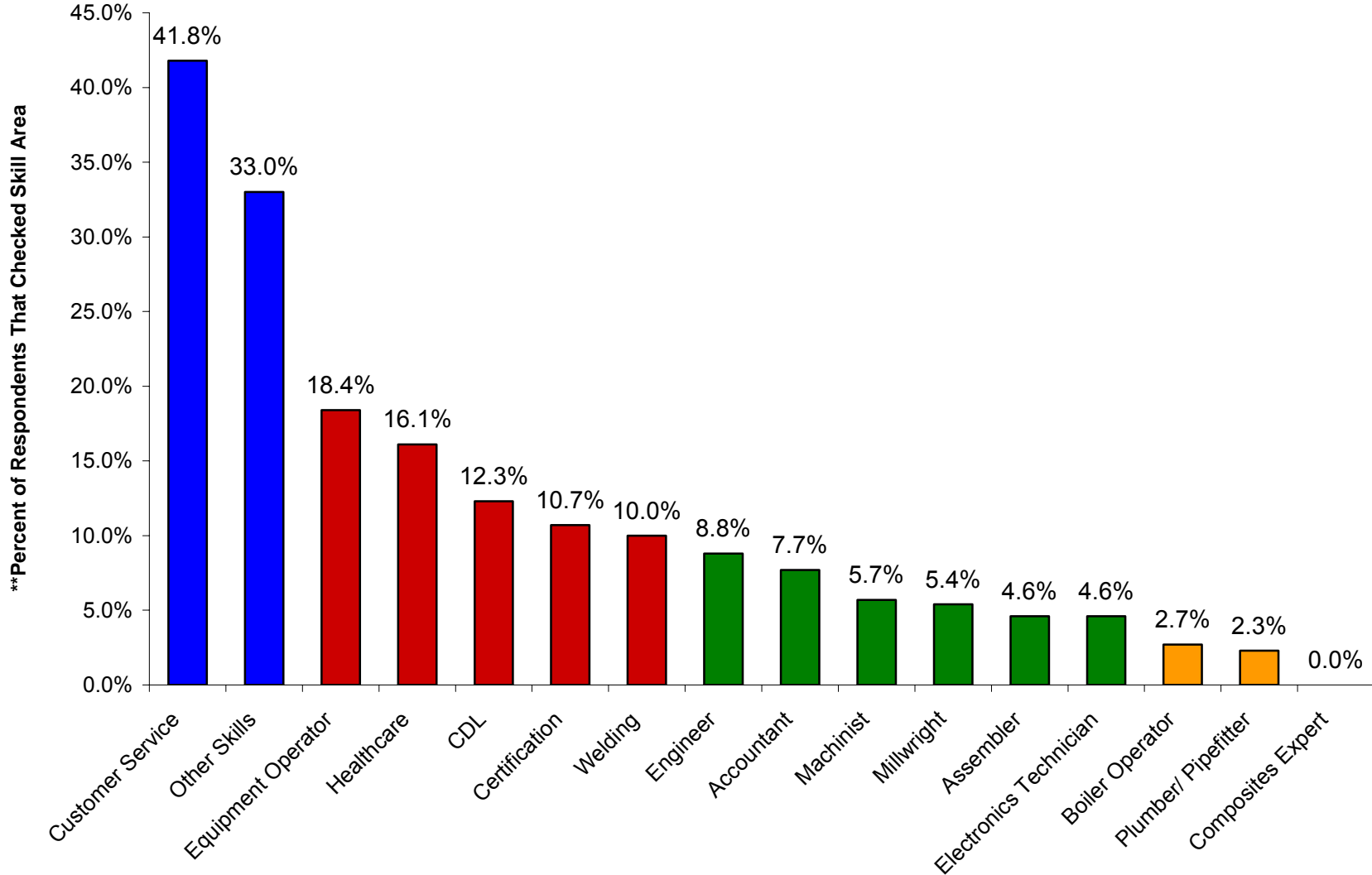
Technology

Television Producers  
Webmaster  
Writers

Transportation

City Transit Drivers  
Diesel Mechanic  
Over the Road Truck Drivers  
Parts Counter Person

**Chart 4: Occupations or Key Skills That Match Workforce Needs**



**Q4. Please review the list below and check all of the occupations or skills areas that best match what you will be looking for in employees when fulfilling your workforce needs.**

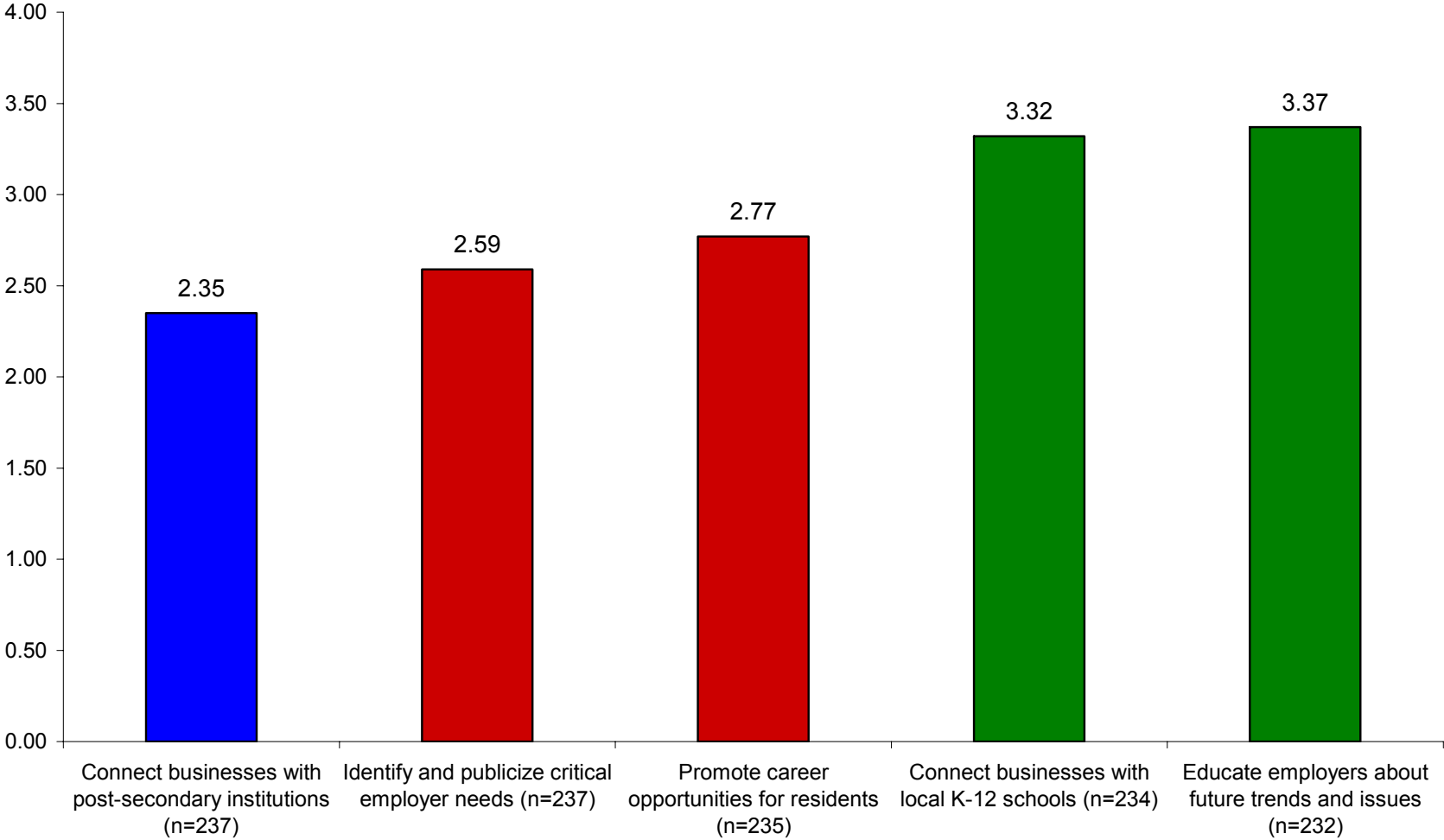
The most commonly checked occupation or skill was customer service (41.8%). One-third of respondents indicated that some other skill or occupation would be in demand in filling their workforce needs. As with the types of open positions mentioned previously, these varied greatly and should be reviewed in Appendix A. Fewer than two in 10 respondents marked equipment operator (18.4%), healthcare (16.1%), CDL (12.3%) and a particular certification (10.7%). The remaining skill areas and occupations were checked by fewer than one in 10 respondents.

- Businesses and organizations with fewer employees were more likely to check **customer service**, with 41% of those with less than 10 employees, 51% of those with 10 to 24 employees and 47% of those with 25 to 49 employees checking this occupation or skills area, while only 26% of those with 50 to 99 employees and 20% of those with 100 or more employees checked it as a skill they will be looking for in future hires.
- While there appears to be a pattern suggesting that businesses and organizations with 100 or more employees are more likely to need certain positions, such as **boiler operators, assemblers, millwrights and engineers**, than those with fewer employees, this trend is based on a relatively small number of respondents.
- Businesses and organizations that are headquartered elsewhere (20%) are also more likely than those that are locally owned (7%) to need **engineers**.
- Businesses and organizations with 100 or more employees (52%) are more likely to need **healthcare** employees than those with less than 10 (4%), 10 to 24 (17%), 25 to 49 (12%) or 50 to 99 employees (22%). This is not surprising since most hospitals have a large number of employees.

Most respondents who specified a type of engineer needed indicated that civil, electrical and mechanical are in demand, while a few others were listed as well. Types of healthcare workers that employers specified include: various nursing positions, assistants, laboratory workers, and doctors, as well as those with dental and veterinary focuses. Other critical jobs or skills that employers highlighted include: computer skills, human services, sales, mechanics, carpenters, and line workers, along with many others.

Other than customer service, it is clear that workforce needs are closely correlated with the individual business sectors responding to the survey. As a result, any campaign designed to attract workers to the area will need to be tailored to these sectors rather than being a one size fits all generic program for promoting employment opportunities in the region.

**Chart 5: Mean Ratings of Rank of Importance of Activities**  
(1=MOST IMPORTANT and 5=LEAST IMPORTANT)



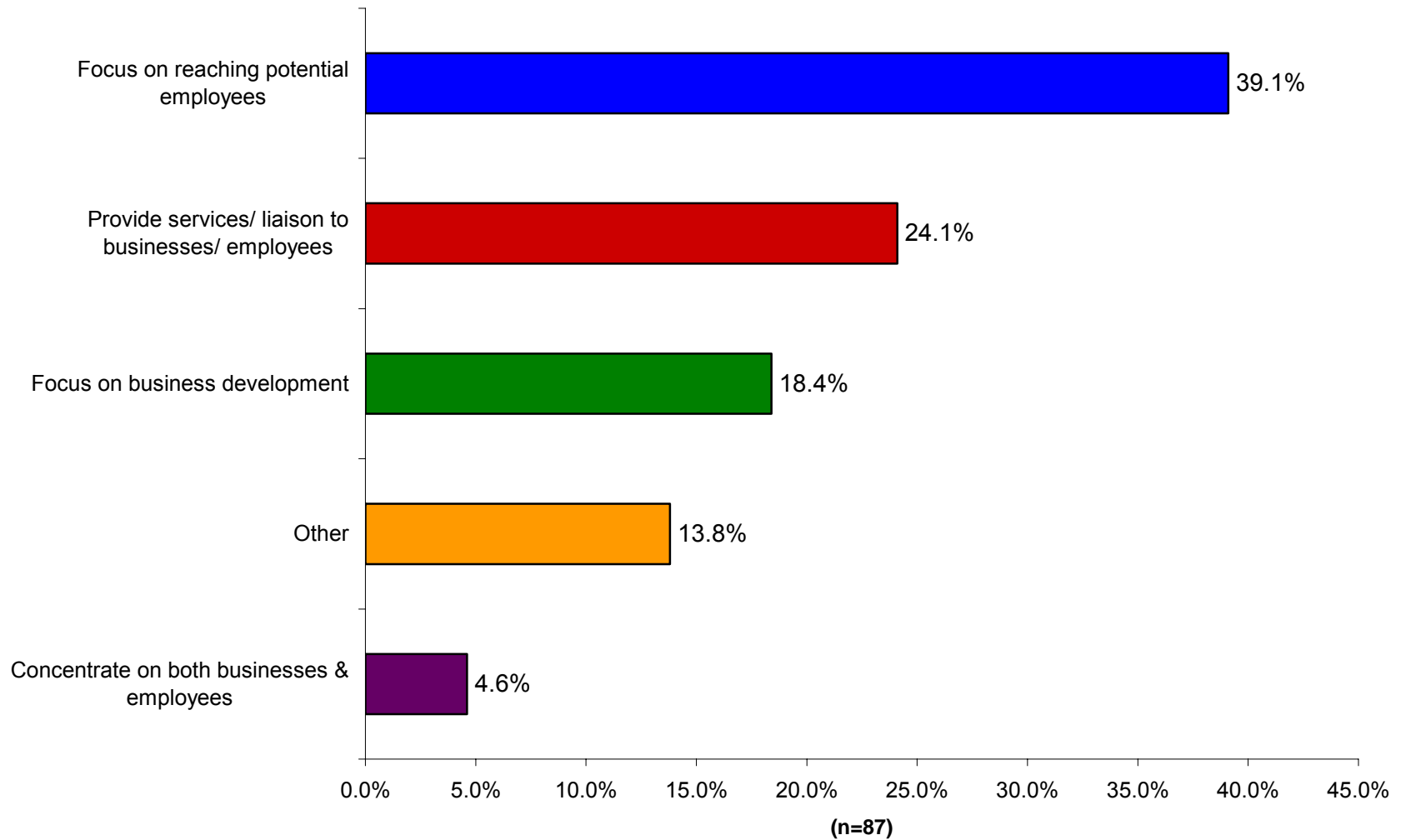
**Q5. Below are action areas that TNW is considering. Please rank each activity in order of importance to your business or organization. (1=MOST IMPORTANT and 5=LEAST IMPORTANT, use each number once.)**

Keep in mind that a LOWER mean score equates to an action area ranking HIGHER in importance to the respondents. Connect businesses with post-secondary institutions received the lowest (most important) ranking (2.35 mean and 2.0 median), followed closely by identify and publicize critical employer needs (2.59 mean and 2.0 median). Promote career opportunities for residents (2.77 mean and 3.0 median) also ranked fairly high in respondents' opinions about the importance of possible TNW action areas. Connect businesses with local K-12 schools (3.32 mean and 4.0 median) and educate employers about future trends and issues (3.37 mean and 3.0 median) were ranked as the least important of the proposed action areas.

- Businesses and organizations that are locally owned (3.21 mean) ranked **connect businesses with local K-12 schools** as more important than those that are headquartered elsewhere (3.88 mean).
- Respondents from Wisconsin (2.55 mean) ranked **promote career opportunities for residents** as more important than those from Minnesota (2.92 mean).

These results confirm the perceived importance of working closely with educational institutions at all levels. It is clear that employers recognize the importance of informing students of the opportunities right in their own backyard and the option of staying or returning home when they have completed their education. As a result, TNW will need to focus on building this connectivity between students starting at an early stage in the education process. Likewise, employers will need to provide apprenticeship programs and internships in conjunction with the schools.

**Chart 5a: Other Activities TNW Should Consider to Attract Workers**

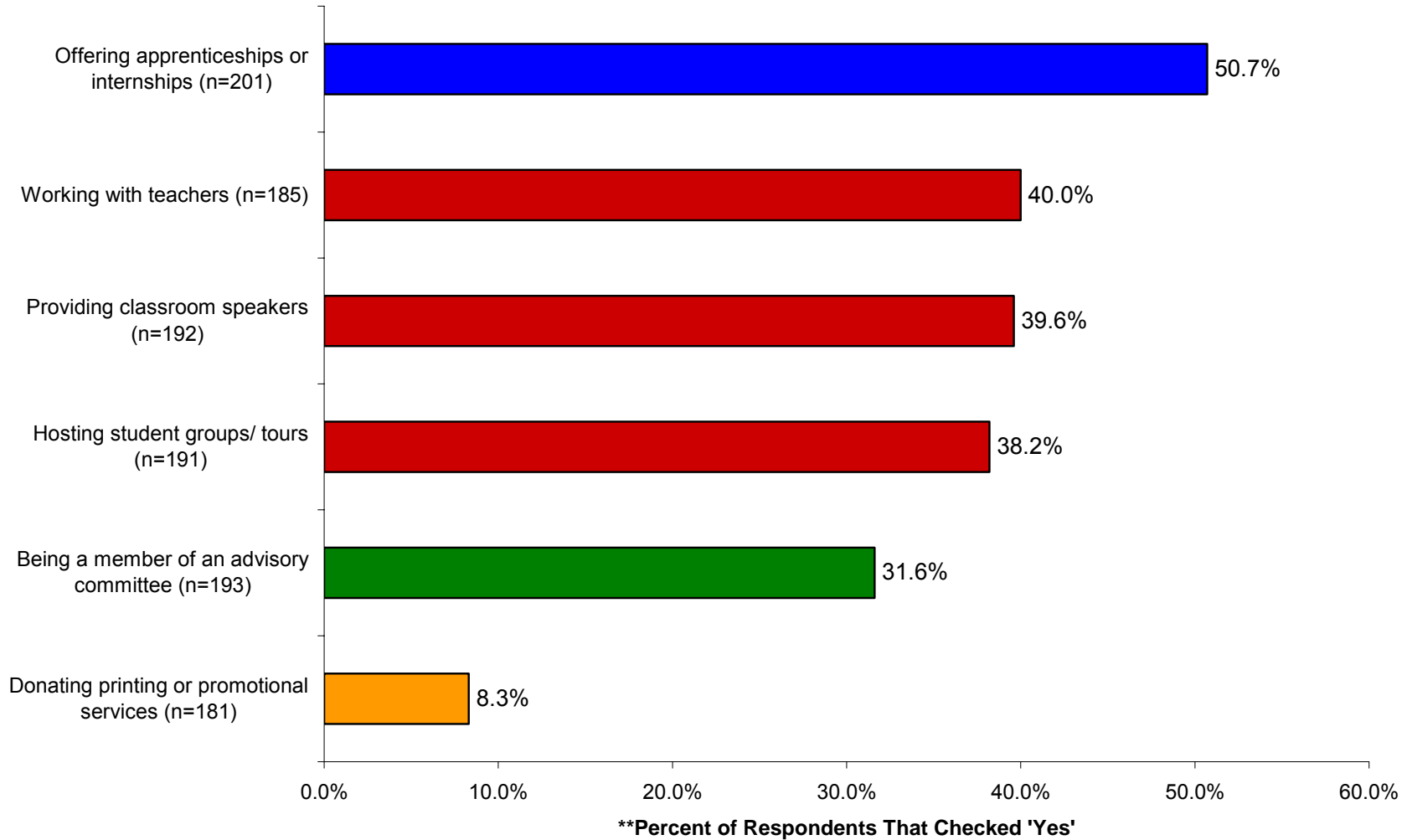


## **Q5a. What other activities do you think TNW should consider working on to attract workers to this area?**

Only one-third of respondents offered suggestions for other activities TNW should consider to attract workers to the Northland area. GKA coded these suggestions into the categories shown in Chart 5a. Not surprisingly, four in 10 (39.1%) offered a comment that focused on reaching potential employees. However, one-quarter (24.1%) said TNW should provide some sort of service to businesses or employees or act as a liaison for them. Two in 10 (18.4%) suggested that TNW focus on business development, and 4.6% offered a recommendation that centered on both businesses and employees. Select comments include:

- *A more aggressive approach to supporting business development in the area.*
- *Ancillary services package for anyone moving into area (housing, schools, medical).*
- *As a small business we cannot compete with the large industries in the Northland (mining, State of MN, etc.) in what they offer for wages & benefits. Can small industry ban together to get better packages? Can TNW help facilitate that?*
- *Define, develop, promote opportunities outside the job. Workers don't just want a job, they want a life and need to understand what the area has to offer.*
- *Develop more venues for career announcements.*
- *Educating the public on careers that are available in the area, and why they are important.*
- *Ensuring we have an educational system (K-12) that people want to enroll their children in.*
- *Figure out how to get some high paying jobs in the area.*
- *Get city council to quit over-regulating businesses that are already regulated by other entities.*
- *Help advertise outdoor recreational opportunities which make this area desirable to live in.*
- *I strongly believe we need more in the line of apprenticeships and internships to keep young people here. Not everyone learns from books – hands-on is a great alternative.*
- *Improving quality of life with, for example, better public transportation, bike lanes on all major roadways, teleworking initiatives, flexible scheduling, subsidizing pay rate increases so employers can pay more & retain staff.*
- *Job fairs. One main website for job postings that the majority of the area uses.*
- *Make businesses & organizations aware of the advantages of hiring the older workers.*
- *Marketing the benefits of residing in this region – attracting businesses to the region.*
- *Overall public awareness/ high visibility campaign on critical needs job shortages & where to go to school to qualify.*
- *Reaching out to ex-residents to let them know about opportunities up north.*
- *Survey of surrounding wages for similar jobs and demographics.*
- *Work with vo-techs & colleges for “professional” programs in conjunction with local businesses.*

**Chart 6: Activities Respondent's Company Would Participate In**



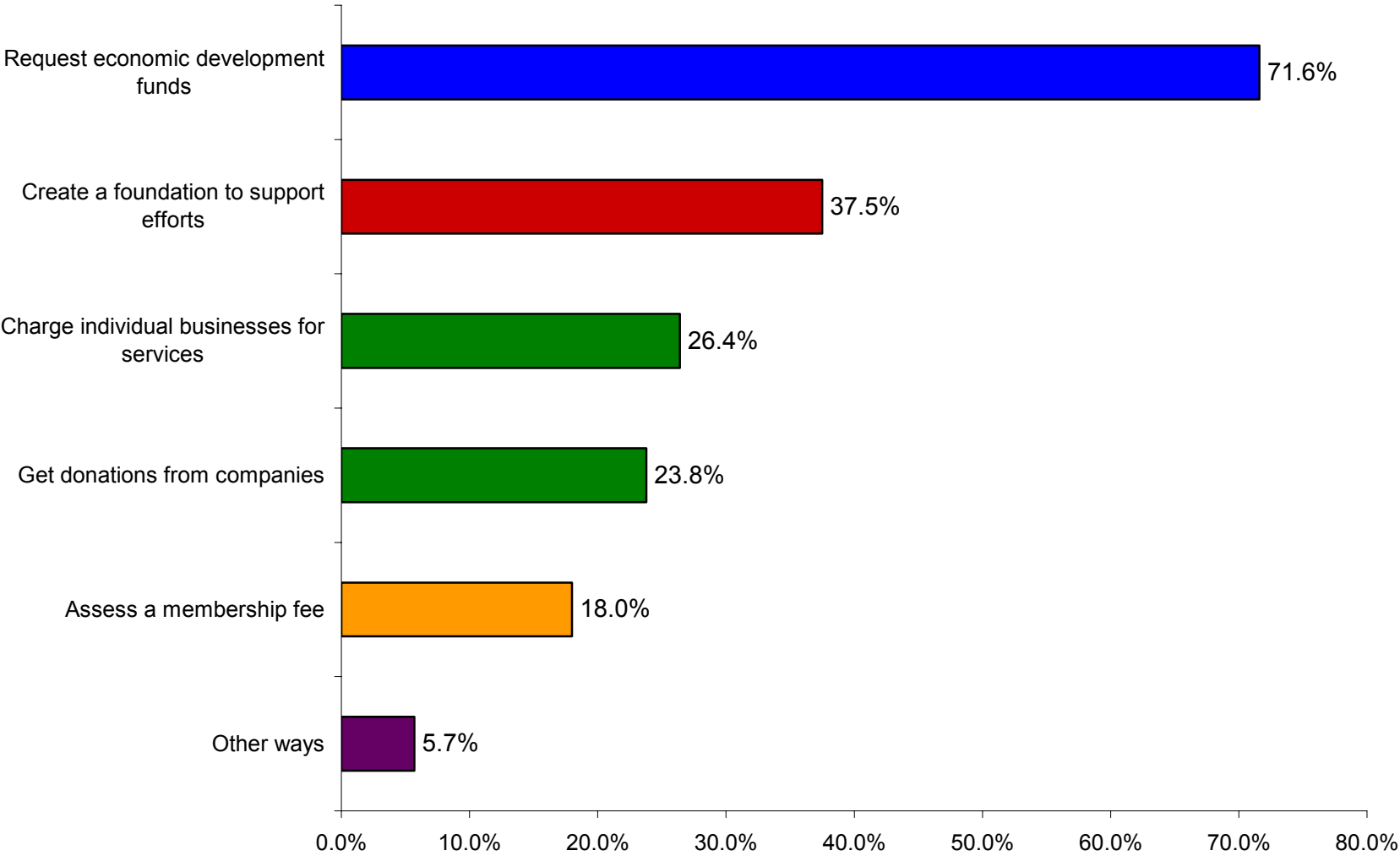
**Q6. Would your business or organization like to work with TNW in implementing these action areas?**

Just over one-half (50.7%) of respondents indicated that their business or organization would be interested in offering apprenticeships or internships. There is also strong interest in participating in the other action areas specified, such as working with teachers (40.0%), providing classroom speakers (39.6%), hosting student groups or tours (38.2%), and being a member of an advisory committee (31.6%). Only 8.3% of respondents noted that they would want to donate printing or promotional services.

- Businesses and organizations with more employees are generally more willing to participate in the listed action areas. Those with 100 or more employees were more likely to indicate that they would **host student groups/tours** (73%), **provide classroom speakers** (68%), and **be a member of an advisory committee** (70%). While not significantly higher than companies with fewer employees, those with 100 or more were also more likely to respond that they would be interested in **working with teachers** (59%) and **offering apprenticeships or internships** (77%). It is possible that respondents from smaller companies do not feel that their business or organization has enough time and other resources to participate in these activities.
- Respondents from Minnesota (12%) were more likely than those from Wisconsin (2%) to be willing to **donate printing or promotional services**.

These results confirm that employers are willing to help TNW build closer connections with educational institutions, and to work closely with educators and students. These efforts will require more personal one on one efforts by TNW public and private partners that can be publicized by an information campaign and on its Web site.

**Chart 7: Best Ways to Fund TNW Activities**



**\*\*Percent of Respondents That Checked Activity**

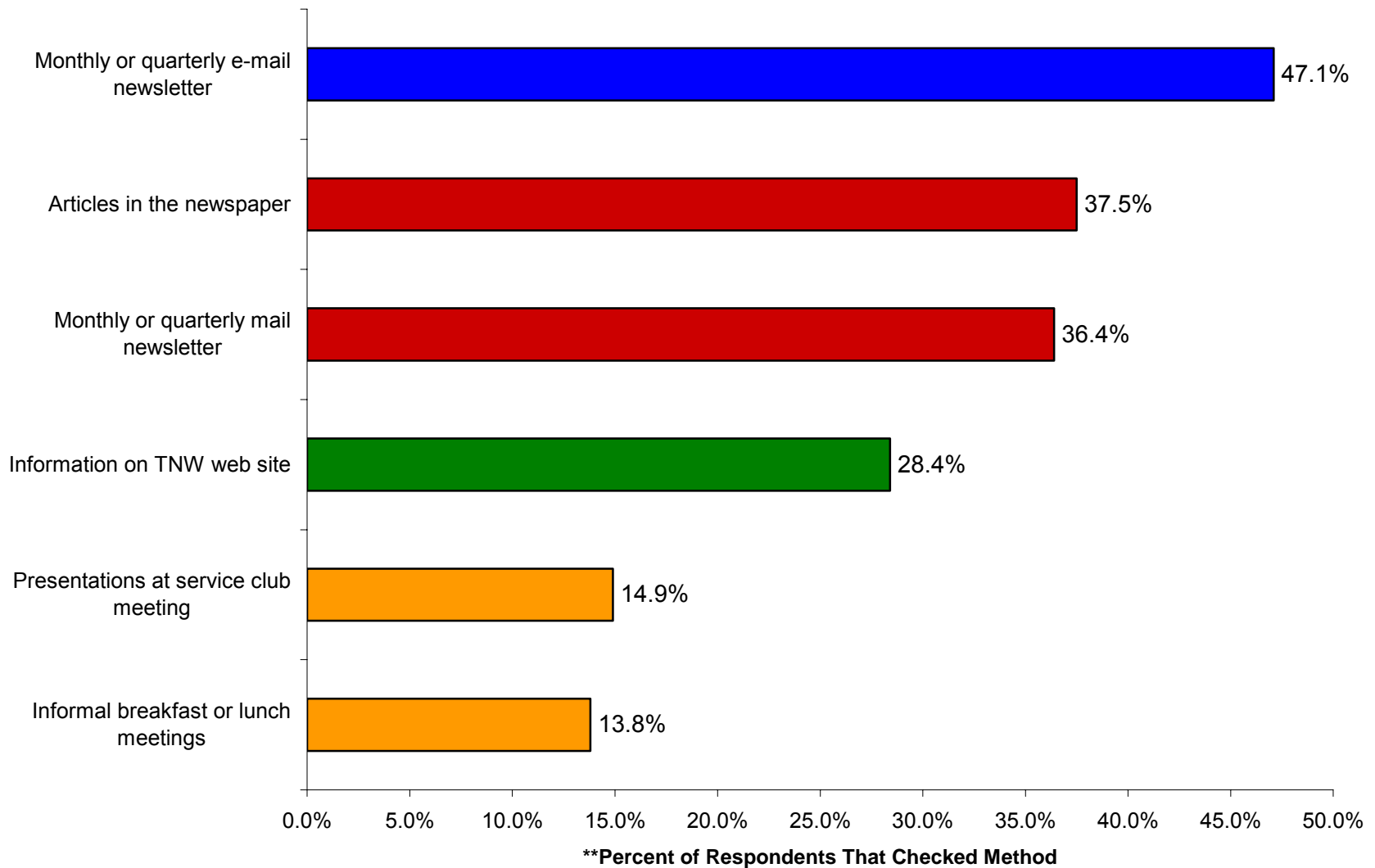
**Q7. Please check all the ways that TNW should get funding to attract needed workers to this area that are acceptable to you.**

The majority of respondents (71.6%) think that requesting economic development funds is an acceptable way to get funding to attract needed workers to the area. Far fewer respondents support creating a foundation to support efforts (37.5%), charging individual businesses for services (26.4%), getting donations from companies (23.8%), and assessing a membership fee (18.0%).

- There was a significant drop in the number of respondents who checked **request economic development funds** among employers with 50 to 99 employees (48%), compared with businesses and organizations with less than 10 (67%), 10 to 24 (76%), 100 or more (80%) and 25 to 49 employees (88%) that considered this to be a very viable method to obtain funding.

These results point to TNW's offering various options for employer participation in supporting its initiatives that require funding. As a one stop shop for coordinating efforts to attract and retain workers, TNW can start by using an advisory committee to determine how best to approach funding issues. It is clear that some employers are willing to go the private pay route as well as seeking public funding for workforce development efforts.

### Chart 8: Best Ways for TNW to Keep Employers Informed



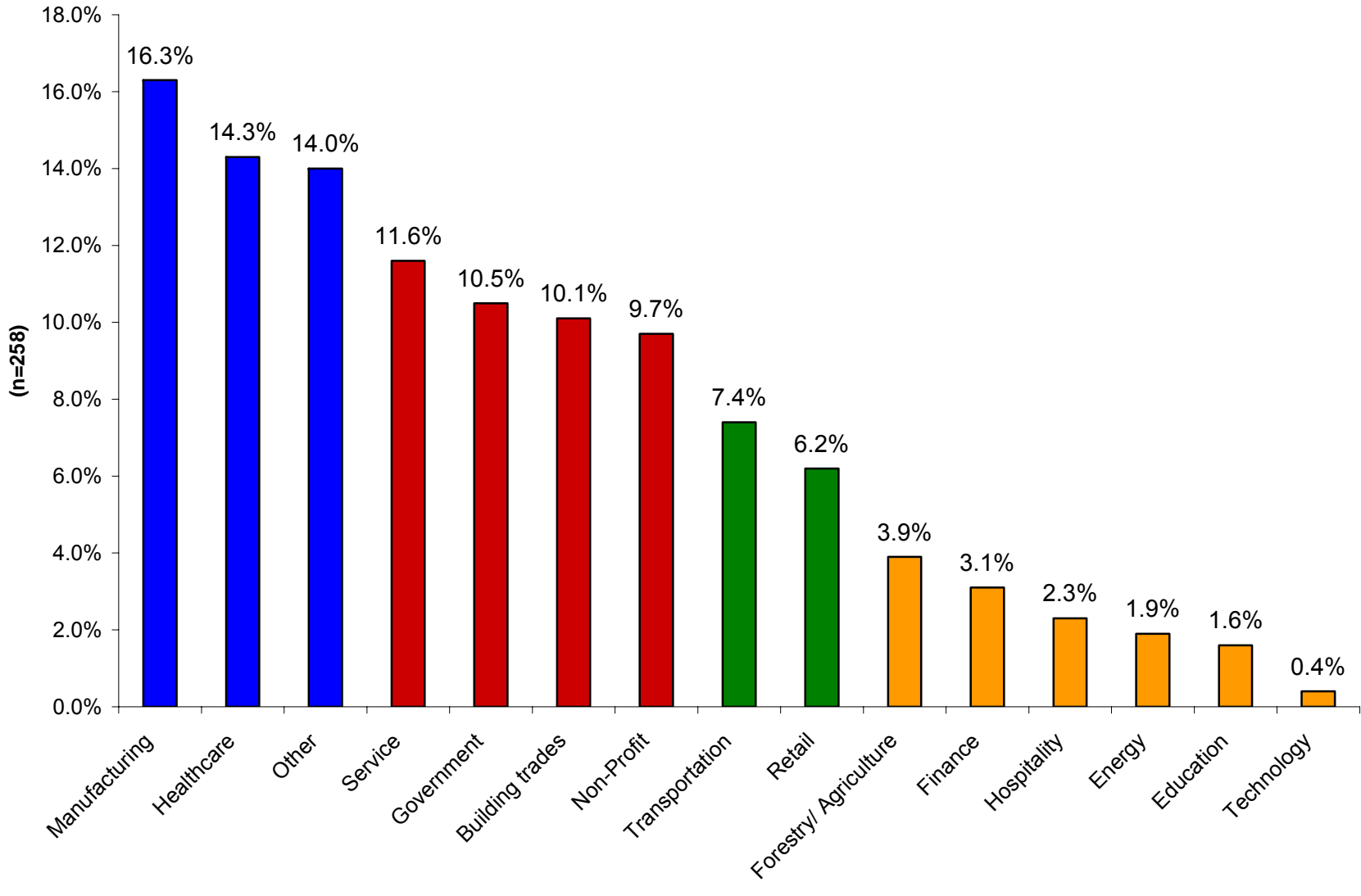
**Q8. Please check the best methods to inform your business or organization about TNW activities.**

Nearly one-half (47.1%) of respondents said that a monthly or quarterly e-mail newsletter would be the best way to inform their business or organization about TNW activities. Putting articles in the newspaper (37.5%) is also a good way to inform businesses and organizations about what TNW is doing, as is a monthly or quarterly mail newsletter (36.4%) and publishing information on the TNW web site (28.4%). Fewer respondents indicated that they would like to receive information via presentations at service club meetings (14.9%) or informal breakfast or lunch meetings (13.8%).

- Respondents from the larger employers of 100 or more (32%), 50 to 99 (17%) and 25 to 49 employees (16%) are more likely to support **informal breakfast or lunch meetings** than those from smaller employers of less than 10 (8%) or 10 to 24 (12%) employees.
- Communication methods that involve in-person contact were less likely to be supported by respondents from Wisconsin than those from Minnesota. **Informal breakfast or lunch meetings** (9% vs. 18%) and **presentations at service club meetings** (7% vs. 20%) were both received with less enthusiasm by Wisconsinites.

These results indicate that TNW will need to use an integrated communication approach involving a combination of methods. While the Internet provides an inexpensive, convenient communication channel, it requires having access to up-to-date e-mail addresses. In addition, many spam filters block attachments or otherwise classify many messages as junk mail.

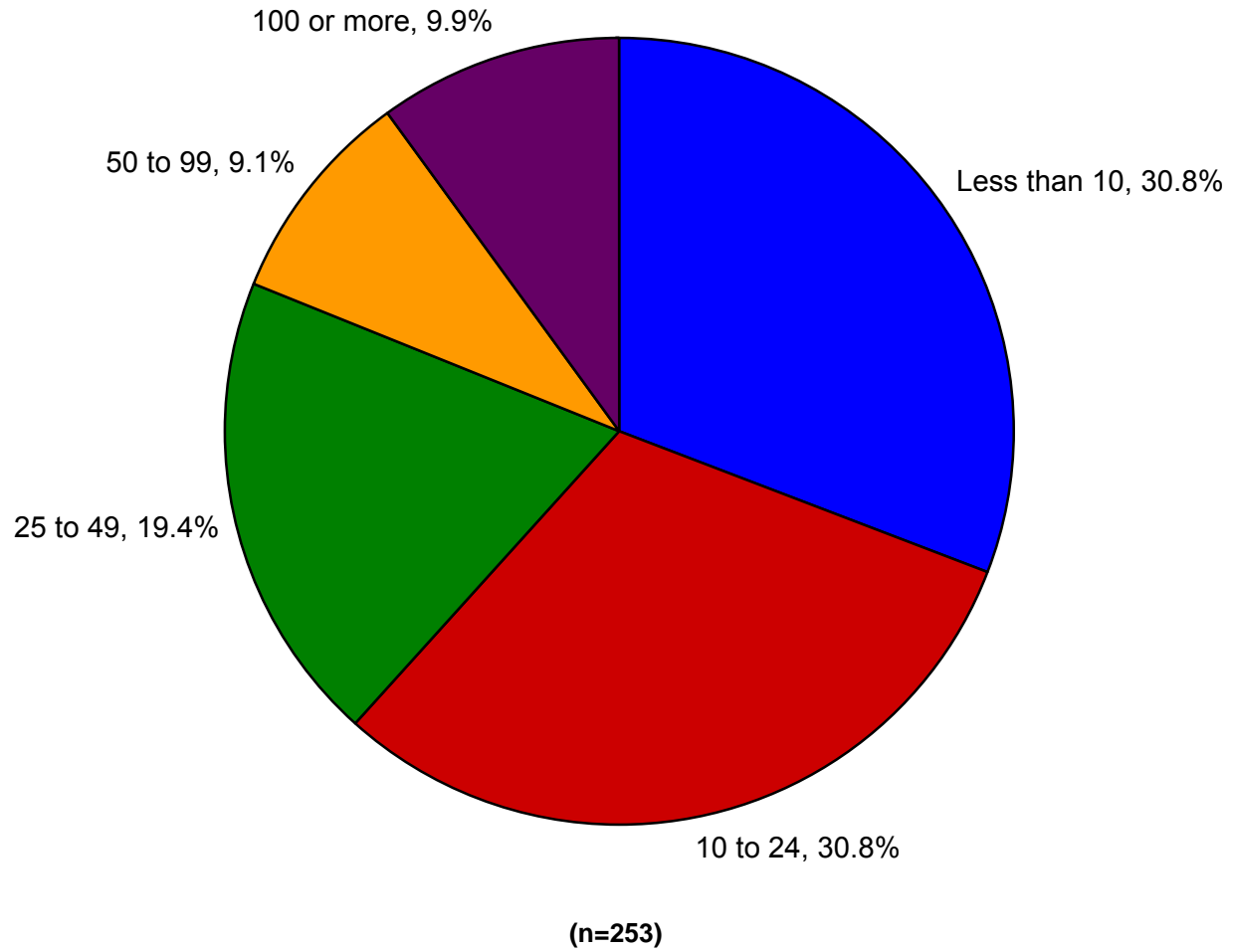
**Chart 9: Business Sector or Industry**



**Q9. What is your business sector or organization's main industry?**

While this question was designed to have only one response, several respondents indicated that more than one coded industry best described what their business or organization does. Therefore, the question structure was changed for analysis to be a "check all that apply." Manufacturing (16.3%) and healthcare (14.3%) top the list, while there were also a fair number of respondents who indicated service (11.6%), government (10.5%), building trades (10.1%), non-profit (9.7%), transportation (7.4%) and retail (6.2%). Fewer respondents classified their industries as being forestry/agriculture (3.9%), finance (3.1%), hospitality (2.3%), energy (1.9%), education (1.6%), and technology (0.4%). The other category consists of a variety of business types.

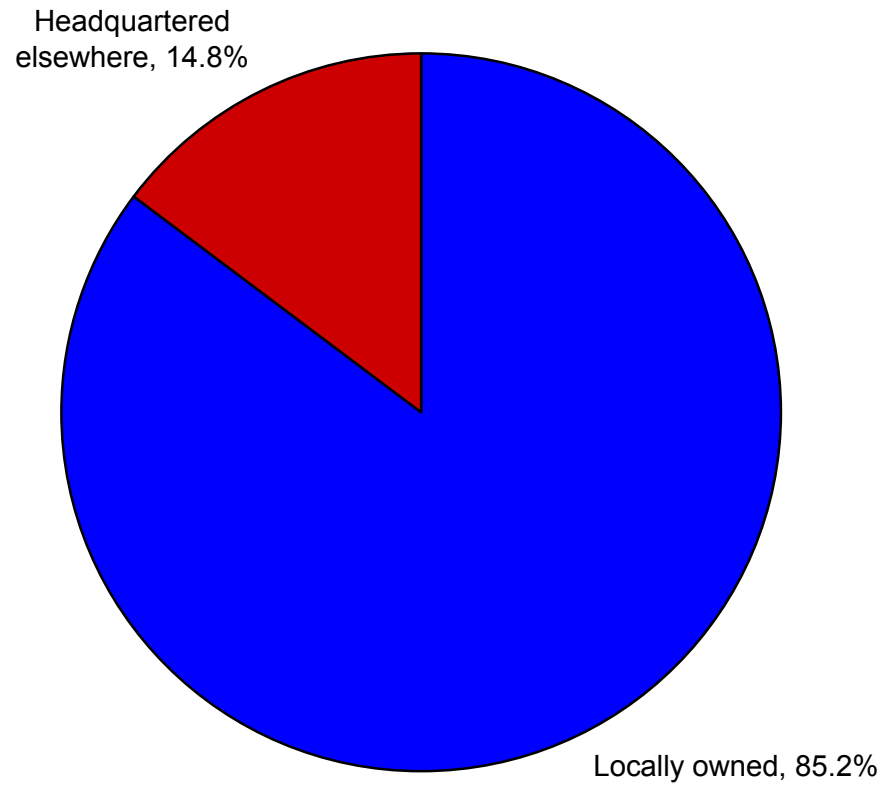
**Chart 10: Number of Employees**



**Q10. How many full- and part-time employees work at this location?**

The majority of respondents have fewer than 25 employees working at their location, with 30.8% saying less than 10 and another 30.8% with 10 to 24 employees. The remainder have 25 to 49 (19.4%), 50 to 99 (9.1%) or 100 or more (9.9%) employees at that location. The original sample list was comprised of the following employment levels: 50.1% less than 10 employees, 31.1% with 10 to 24 employees, 9.9% with 25 to 49 employees, 4.9% with 50 to 99 employees, and 4.0% with 100 or more employees.

**Chart 11: Locally Owned or Headquartered Elsewhere**

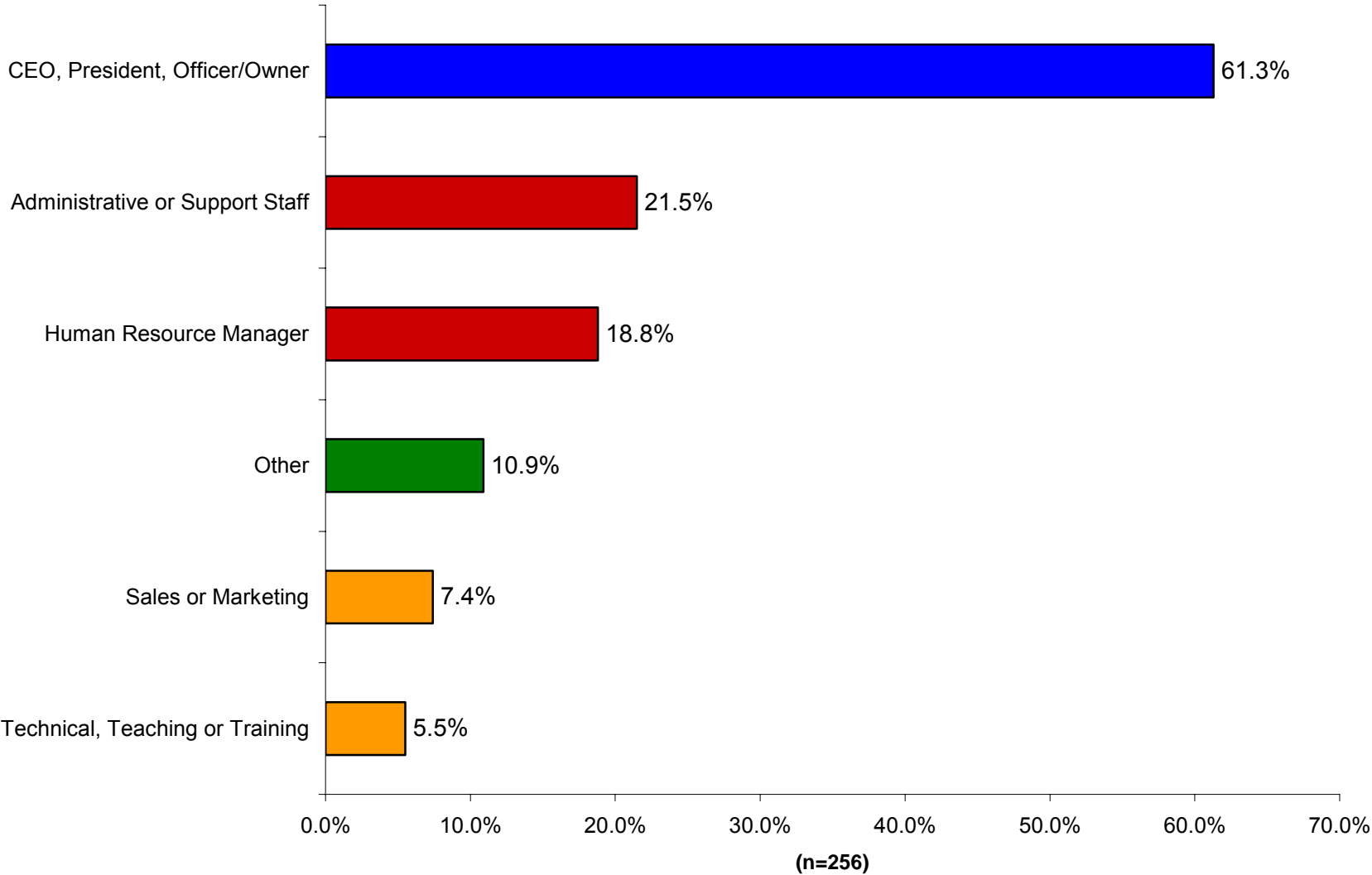


(n=236)

**Q11. Is the business locally owned or part of a larger company headquartered elsewhere?**

The vast majority of responding businesses and organizations are locally owned (85.2%), while 14.8% are headquartered elsewhere. However, this finding indicates that TNW should consider building relations with the corporate offices of firms headquartered elsewhere.

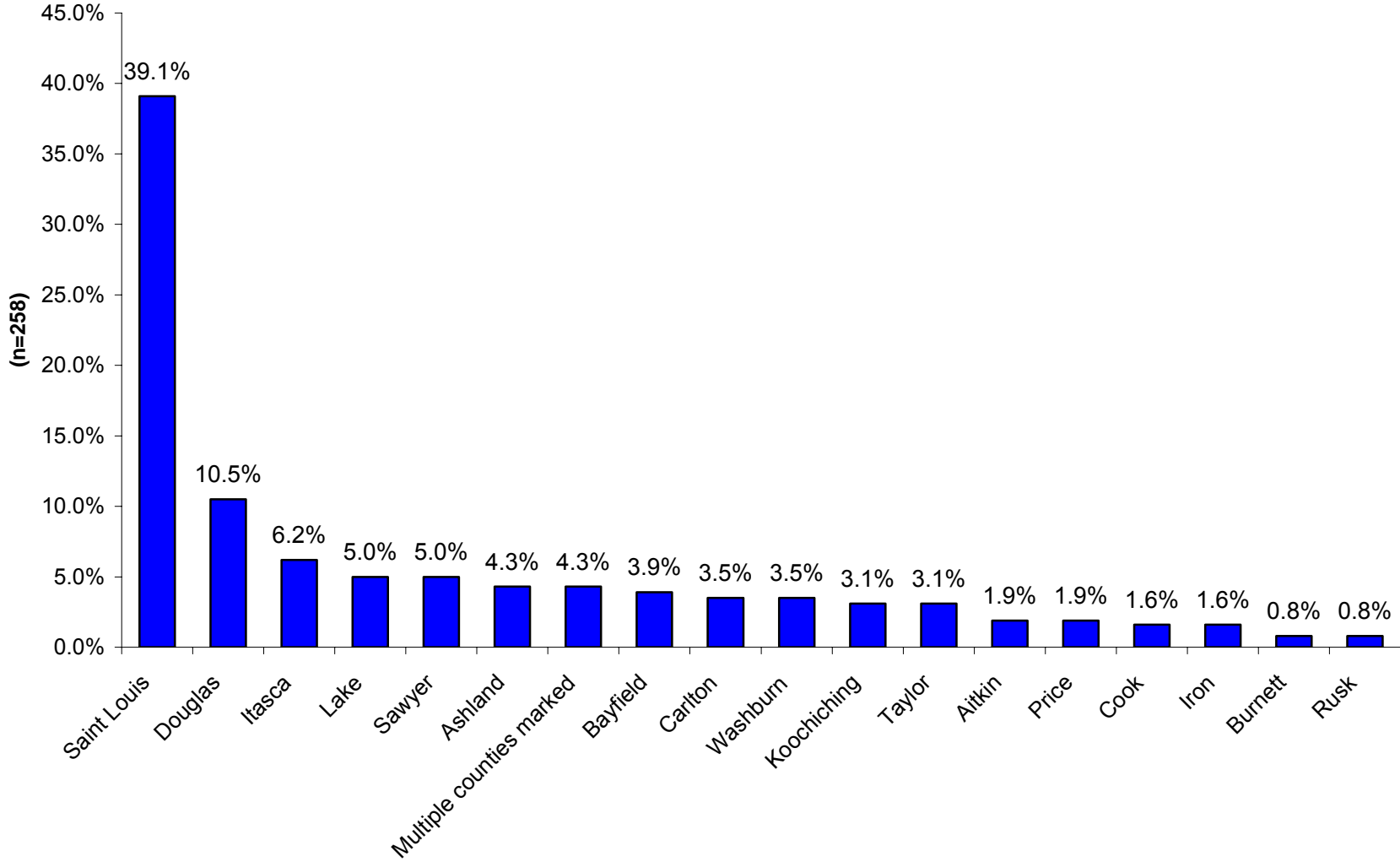
**Chart 12: Respondent's Position**



## **Q12. Which of these categories includes your position?**

This question was also intended to be one for which the respondent would select one answer. However, since many respondents work at small companies they obviously wear many hats, and their responses to this question reflected that. Again, we changed the format of this question for analysis to be a “check all that apply” type of question. Six in 10 (61.3%) respondents are the CEO, president, officer and/or owner, 21.5% indicated that they are administrative or support staff, 18.8% are the human resource manager, 7.4% are in sales or marketing, and 5.5% hold technical, teaching or training positions. Again from a communication perspective, TNW will need to direct its information materials and messages at several levels of the businesses and organizations.

**Chart 13: County in Which Responding Company or Organization Is Based**



**Q13. In what county is this business or organization located?**

Four in 10 (39.1%) responses came from Saint Louis County, 10.5% came from a business or organization in Douglas County, 6.2% were from Itasca County, and 5.0% were received from both Lake County and Sawyer County. The rest of the counties in the survey area each made up less than five percent of the responses received. The survey mailing included businesses and organizations in all 17 counties comprising the region.

Overall, 60.5% of the responses came from Minnesota and 35.3% came from Wisconsin, with 4.3% indicating that their business operates in multiple counties with one or more in both Minnesota and Wisconsin.

