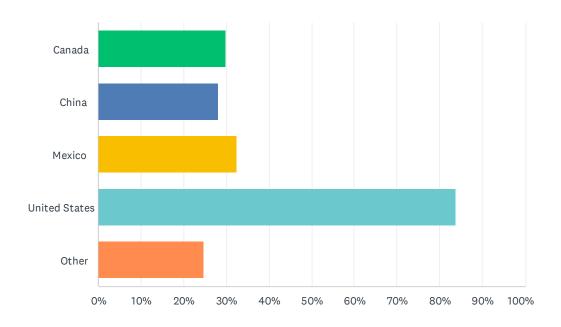
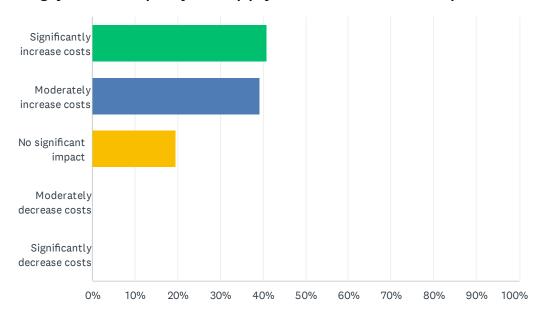


Q1 Where do you currently manufacture products (check all that apply)?



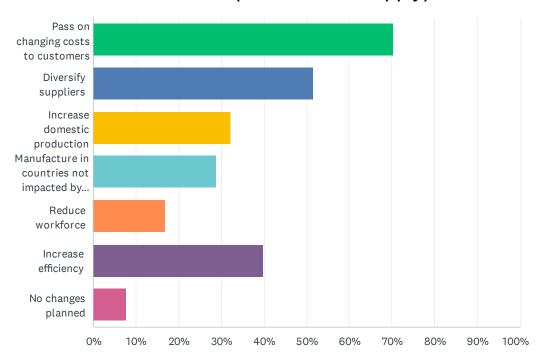
ANSWER CHOICES	RESPONSES
Canada	29.91%
China	28.21%
Mexico	32.48%
United States	83.76%
Other	24.79%

Q2 How are the newly implemented tariffs with Canada, China and Mexico impacting your company's supply chain and overall production costs?



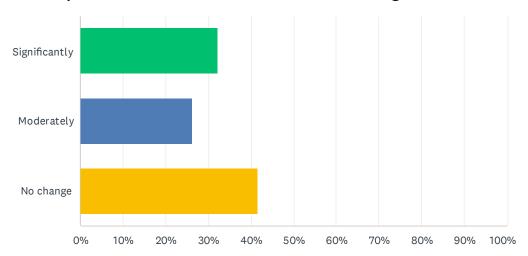
ANSWER CHOICES	RESPONSES
Significantly increase costs	41.03%
Moderately increase costs	39.32%
No significant impact	19.66%
Moderately decrease costs	0.00%
Significantly decrease costs	0.00%

Q3 How are you planning to address the changing environment caused by the tariffs (check all that apply)?



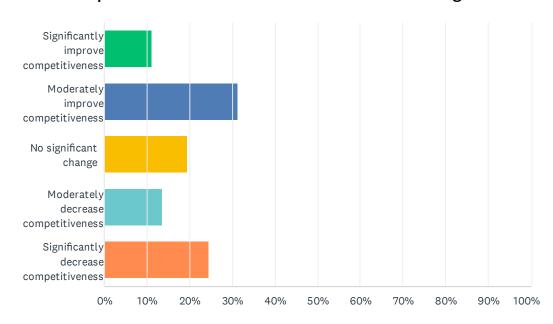
ANSWER CHOICES	RESPONSES
Pass on changing costs to customers	70.34%
Diversify suppliers	51.69%
Increase domestic production	32.20%
Manufacture in countries not impacted by tariffs	28.81%
Reduce workforce	16.95%
Increase efficiency	39.83%
No changes planned	7.63%

Q4 How likely are you to increase your use of Lean principles and tactics in response to the current manufacturing environment?



ANSWER CHOICES	RESPONSES
Significantly	32.20%
Moderately	26.27%
No change	41.53%

Q5 What do you think will be the long-term effects of these tariffs on the competitiveness of the U.S. manufacturing sector?



ANSWER CHOICES	RESPONSES
Significantly improve competitiveness	11.02%
Moderately improve competitiveness	31.36%
No significant change	19.49%
Moderately decrease competitiveness	13.56%
Significantly decrease competitiveness	24.58%