

# You may get what you want ...but you can't always get what you need: the Georgia Manufacturing Survey 2014



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# About the Survey

- Existing manufacturing surveys—what manufacturers want
  - Business, Retention & Expansion Surveys
- The Georgia Manufacturing Survey—wants + needs
  - Benchmark manufacturing problems + performance , use of technologies, techniques, manufacturing assistance resources
- Process
  - Conducted every 2-3 years since 1989
  - Mail survey + Web, other options
  - Manufacturing establishments with 10+ employees
  - 504 respondents weighted to reflect ES-202 size, industry
  - Partners: Georgia Tech; Kennesaw State University; Georgia Department of Labor; Habif, Arogeti, and Wynne

<http://www.gms-ei2.org/>

2014

The Georgia Manufacturing Survey

Making it in the Global Economy



# 2014 Georgia Manufacturing Survey Customized Benchmark Report

Your facility compared with industry and total performance reports from 580 participating manufacturers in Georgia



## Key Performance Indicators



	Reported by Your Establishment		Top 10% Medical Supplies	Top 10% of All Manufacturers
	2013	% Change 11-13	% Change 11-13	% Change 11-13
Percent of sales from exports	10.0%	-33.3%	156.7%	110.5%
Sales per employee	\$212,414	6.8%	90.0%	47.7%
Employees average wages	\$81,069	-9.3%	32.1%	31.3%

## Innovation and Human Resources



	Reported by Your Establishment in 2013	Top 10% Medical Supplies	Top 10% of All Manufacturers
Developed improved or new products	No	Yes	Yes
Developed new to industry products	No	Yes	Yes
Sales from new products	0.0%	50.0%	30.0%
Applied for patents	No	Yes	No
Developed improved or new processes	No	Yes	Yes
Amount spent for training per employee	\$71	\$323	\$1111

## Manufacturing Technology



	Reported by Your Establishment in 2013	Top 10% Medical Supplies	Top 10% of All Manufacturers
Cloud-based manufacturing and design	No	No	No
Life cycle analysis	Yes	Yes	No
Advanced manufacturing	Yes	Yes	Yes

n/a = This item was not reported in your survey response. If you wish to provide this data to us, we will be pleased to re-run this Customized benchmark report. Call 404-894-6111. Individual company data is kept confidential.

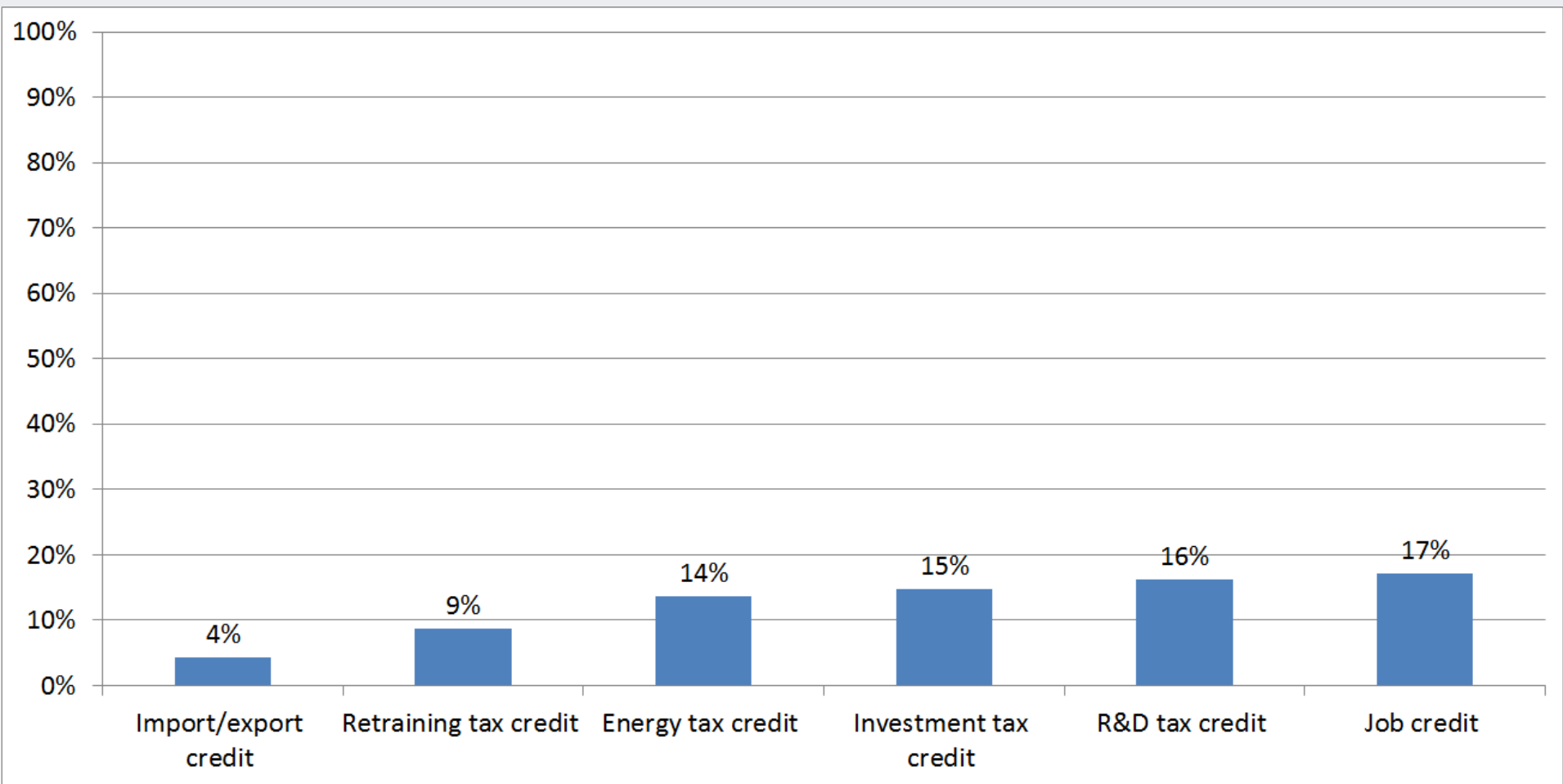
# Wants and Needs

(based on selected findings from the Georgia Manufacturing Survey)

Wants - Manufacturers	Wants - Policymakers	What they get
Tax breaks	Innovation	Low price, basic quality, tax breaks not widely used
Workers to keep up with demand	Investment in training	Lack of technical, basic workers
Growing markets for sales	Globally competitive products	Little exporting
Good infrastructure in rural and urban areas	Soft capabilities (in-house R&D, supplier relations, worker use of IT)	Hard infrastructure

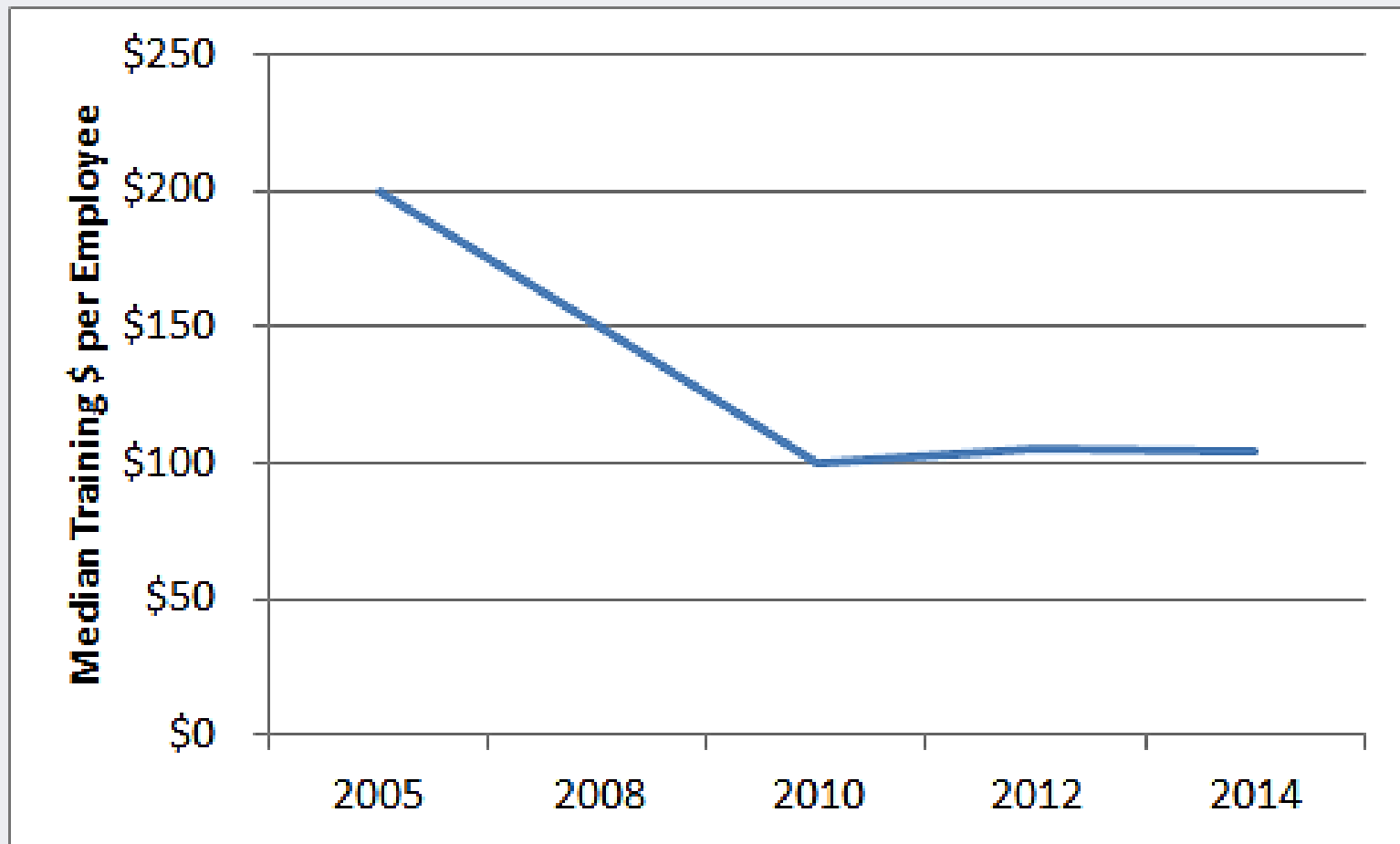
# Most Do Not Use Tax Breaks

(percentage of establishments using tax credit)



Source: Georgia Manufacturing Survey 2014, 504 weighted responses

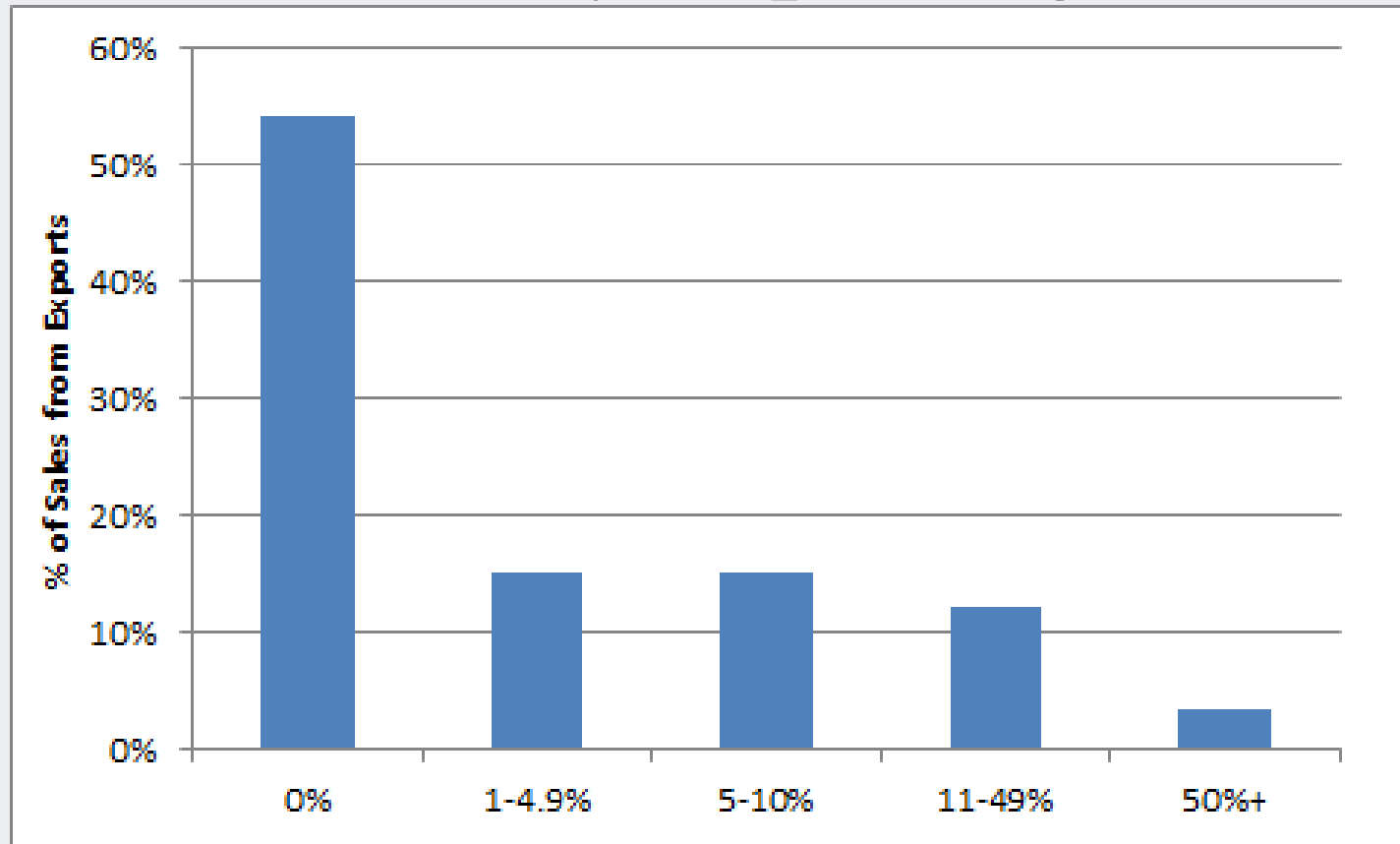
# Education and training important need, but low investment maintained



Source: Georgia Manufacturing Survey 2014, 294 weighted responses; Georgia Manufacturing Survey 2012, 330 weighted responses; Georgia Manufacturing Survey 2010, 295 weighted responses; Georgia Manufacturing Survey 2008, 468 weighted responses; Georgia Manufacturing Survey 2005, 512 weighted responses



# Fewer than half of manufacturers do any exporting



*But exporters have ~60% higher profitability than non-exporters*



# Conclusions

Gap in policy understanding of the difference between want and need → tendency toward easy wants, avoiding complicated needs

Need for good diagnosis about wants and needs