4th Annual Appalachian Ohio State of the Region Conference
Manufacturing Workforce: Building Capacity

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Informative findings of Deloitte Manufacturing Institute Survey

Good news and bad news

Americans overwhelmingly support U.S. manufacturing.

But, most of them are not much interested in working in manufacturing.

Americans believe manufacturing is critically important for a strong national economy

Percentage who think manufacturing is very important or important to …

America’s economic prosperity 90%
America’s standard of living 89%
America’s national security 72%
Americans want stronger policies to support manufacturing

- U.S. needs a more strategic approach to manufacturing base development: 83%
- U.S. should further invest in the manufacturing industry: 82%
- Developing a strong manufacturing base should be a national priority: 77%

Americans believe U.S. manufacturing is globally competitive

- Technology use and availability: 73%
- R&D capabilities: 70%
- Energy availability: 69%
- Supplier and distribution networks: 66%
- Productivity: 65%
But, in American’s opinions, policymakers are coming up short

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Trade policies</td>
<td>43%</td>
</tr>
<tr>
<td>State govt. leadership</td>
<td>42%</td>
</tr>
<tr>
<td>Environmental regs</td>
<td>43%</td>
</tr>
<tr>
<td>Tax policies</td>
<td>36%</td>
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<tr>
<td>Federal govt. leadership</td>
<td>36%</td>
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Americans want manufacturing jobs

Ranking by respondents of the type of new industry facility they would support to create 1,000 jobs in their community:

<table>
<thead>
<tr>
<th>Type of Industry</th>
<th>Rank</th>
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<tbody>
<tr>
<td>Manufacturing</td>
<td>1</td>
</tr>
<tr>
<td>Technology</td>
<td>2</td>
</tr>
<tr>
<td>Energy production</td>
<td>3</td>
</tr>
<tr>
<td>Health care</td>
<td>4</td>
</tr>
<tr>
<td>Retail</td>
<td>5</td>
</tr>
</tbody>
</table>
But, they want those jobs … for someone else

Ranking by overall respondents of industry preference if they were beginning their careers today:

- Technology: 1
- Health care: 2
- Financial services: 3
- Energy: 4
- Manufacturing: 5
- Communications: 6
- Retail: 7

And, uh oh, big trouble with Gen Y (ages 19 – 33)

Manufacturing is dead last as a career choice
American parents are not encouraging their children to pursue manufacturing careers because …

- Worried about job security 66%
- Perception of the industry 53%
- Doesn’t pay enough 49%
- Not a strong career path 45%

Don’t despair … there is a bright side
Industry familiarity really makes a difference

Americans with manufacturing familiarity rank it higher as a career choice: 3rd instead of 5th

And, they are more than twice as likely to encourage their children to look into manufacturing careers

When asked how to increase interest in manufacturing careers, Americans point to a few strategies …

- Internships, work study and apprenticeships 72%
- Certification or degree programs for manufacturing skills training 68%
- On campus recruiting 61%
- Tours of manufacturing facilities 52%
So, Americans have laid out our strategy going forward:

Get lots more people in our communities familiar with manufacturing

Expand internship, co-op, and apprenticeship programs massively

Get to the schools to get to know the emerging workforce

Get the emerging workforce into our plants and offices to get to know manufacturing

Thank you for coming today!

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