



## Wisconsin Manufacturer Automation Pulse Survey Webinar will begin at 8:00 a.m.

### Webinar Logistics:

- All phones will be muted during the presentation.
- Webcams will not be utilized in this presentation.
- Questions can be posted using the webinar Q&A function.
- We will answer questions at the end of the presentation as time permits.
- This webinar is being recorded. A link to the recording will be emailed to those who registered.
- Email [info@wmep.org](mailto:info@wmep.org) to request a pdf copy of this presentation, and/or the Wisconsin Manufacturing Report.



# Wisconsin Manufacturer Automation Pulse Survey September 2022

**Presented by:**

George Bureau, VP Consulting

Colin Wilson, Senior Consultant - Automation

# September 2022 – Wisconsin Manufacturer– Automation Pulse Survey

## Objectives:

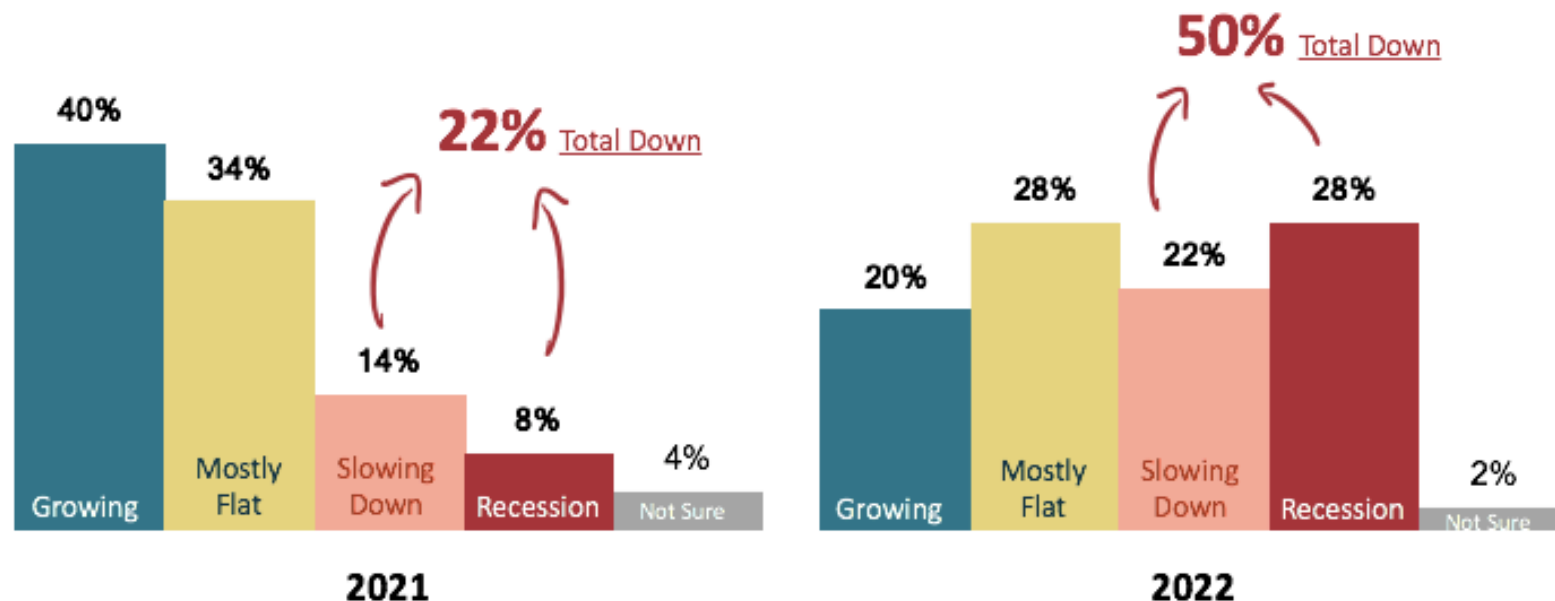
- Explore Wisconsin Manufacturers plans for and perceptions of Automation
- Provide a Benchmark for Wisconsin manufacturers to gauge their response to current challenges against

## Methodology:

- Manufacturer leaders from across the state, representing all major industries and a representative cross section of firm size were invited to participate
- Survey responses were collected 8/14-8/30
- 78 manufacturers participated in the survey
- A representative cross section of manufacturers by type, size and geographic location participated
- Related findings are included from the 2<sup>nd</sup> Annual Wisconsin Manufacturing Report conducted 7/29-8/23 based on interviews with 400 Wisconsin manufacturing executives

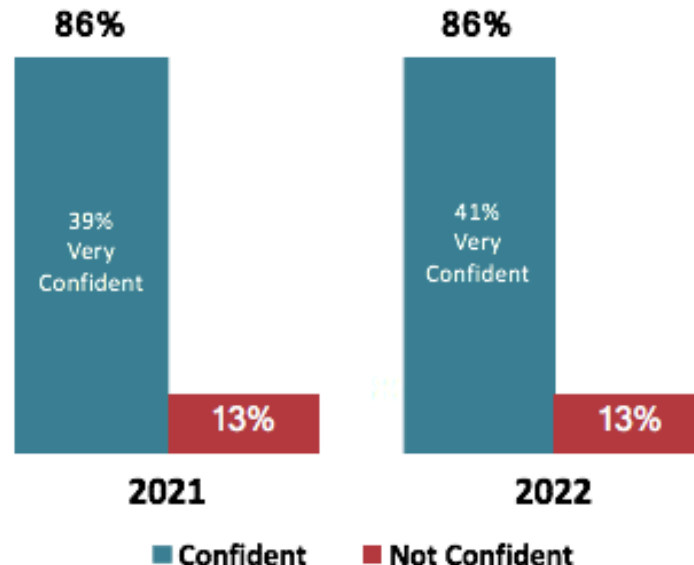
## Most manufacturers now say the state's economy is slowing down.

"Overall, right now, do you think Wisconsin's economy is growing, slowing down, mostly flat, or in a recession?"



## Despite concerns about the overall economy, Wisconsin manufacturing executives remain confident about their own companies' financial outlook.

"Let's shift gears for a moment and focus more on your company. From a financial perspective, how do you feel right now about the future for your company?"

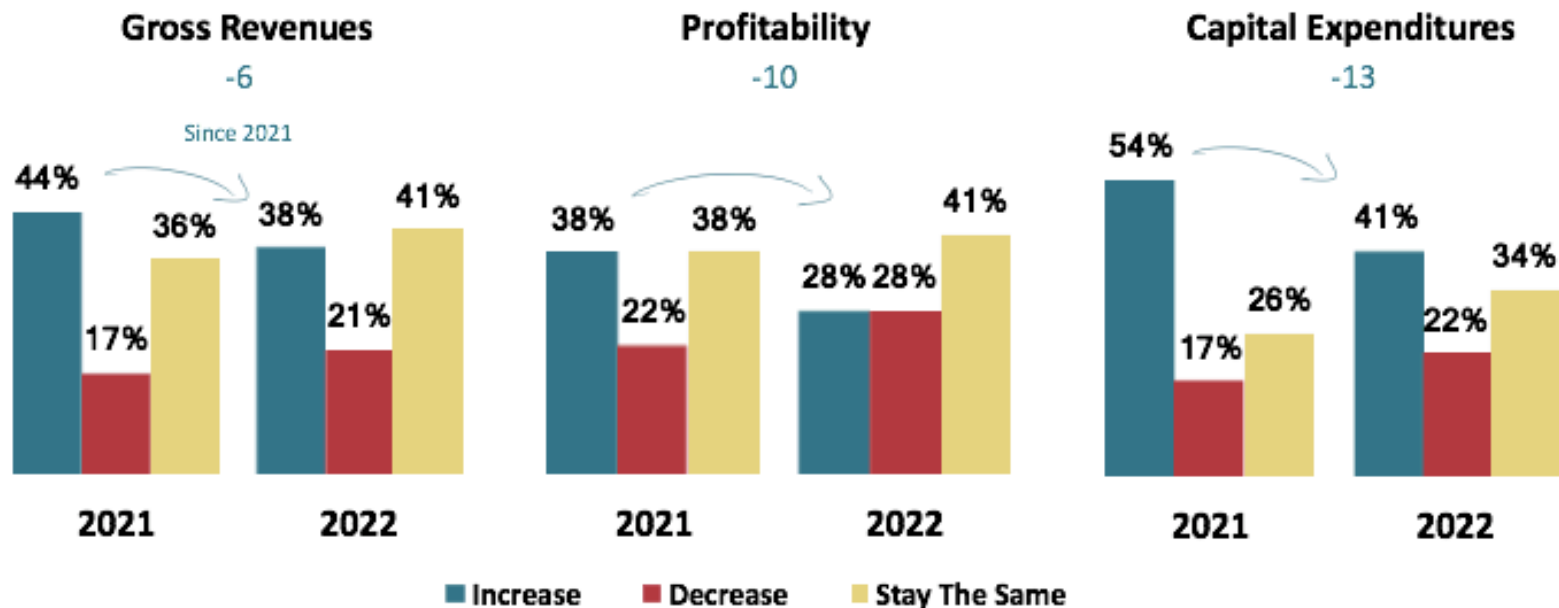


% Very Confident

	2021	2022	Change
1-49 Employees	39%	35%	-4
50+ Employees	40%	58%	+18
Revenue Under \$1 Million	35%	29%	-6
Revenue \$1 - \$5 Million	39%	40%	+1
Revenue \$5 Million +	43%	55%	+12

## Despite that optimism, we see drop-offs in expected increases in gross revenues, profitability and capital expenditures this year.

"As you look to the year-end, do you expect your company's \_\_\_\_\_ for 2022 to increase or decrease compared to 2021, or will they probably stay the same?"

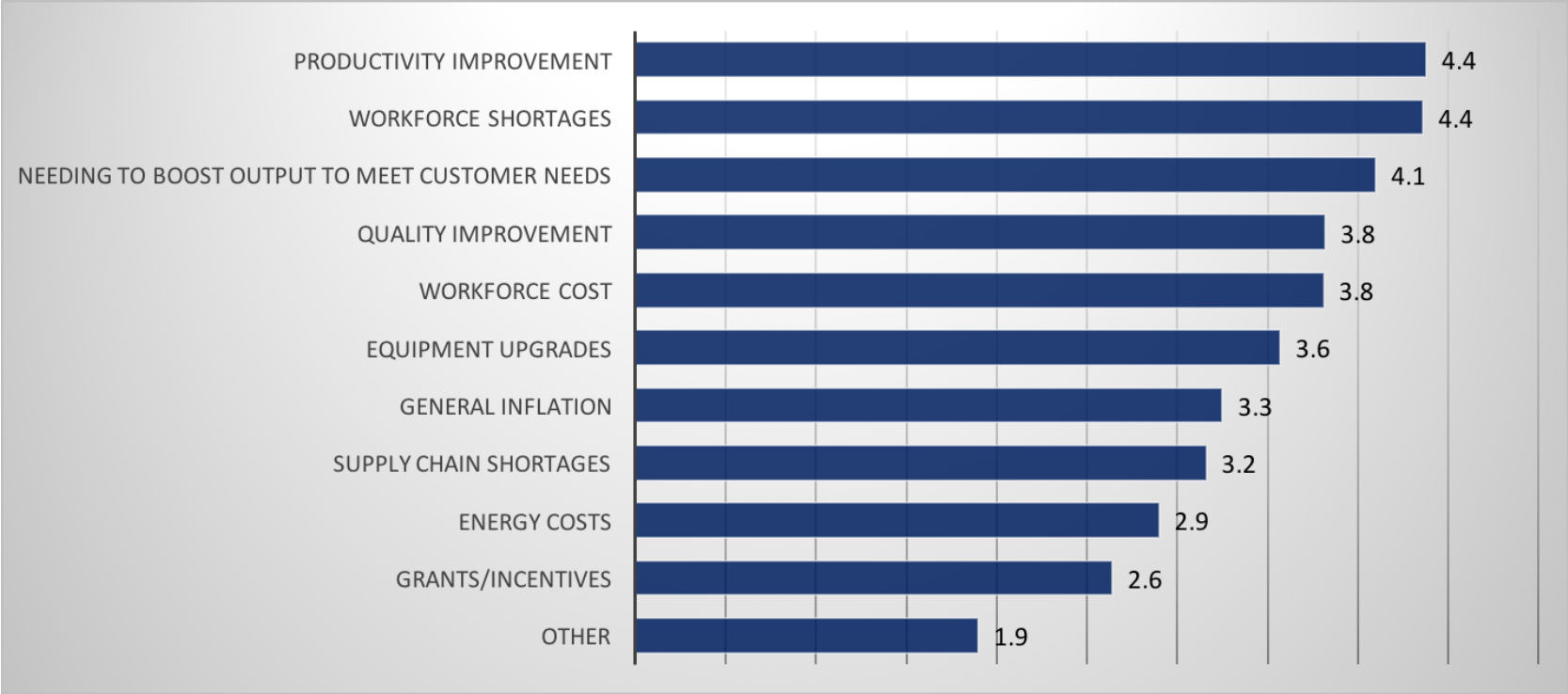


## Of all the potential areas for increasing investment, growing revenue and profitability and maximizing productivity still top the list.

“Overall for the year 2022, do you expect to increase investment in any of the following areas?”

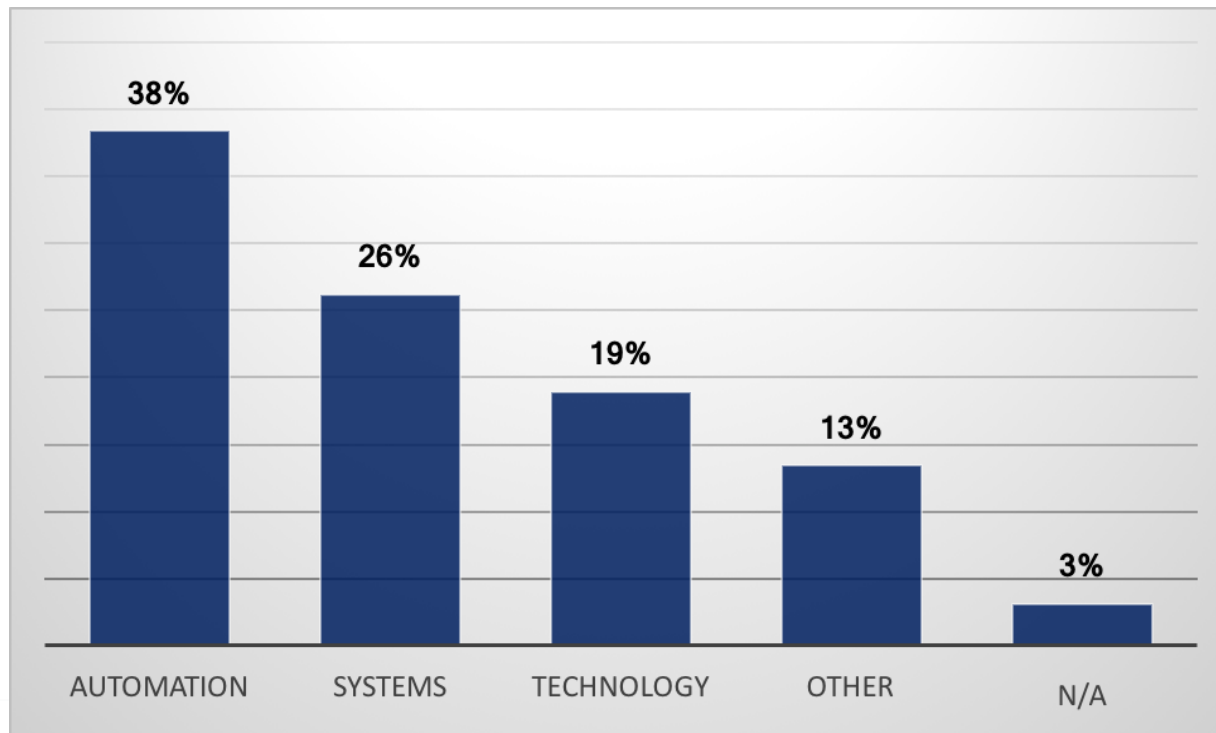
	2021	2022	Change since 2021
Growing revenue and profitability	75%	73%	-2
Maximizing productivity	72%	69%	-3
Expanding sales within the United States	61%	60%	-1
Employee training	59%	57%	-2
Employee development	58%	56%	-2
Systems, technology, and automation	43%	48%	+5
Workplace and company culture	44%	46%	+2
Data and cyber security	34%	33%	-1
Research and development	30%	32%	+2
Expanding sales globally	19%	18%	-1
Obtain ISO certification	3%	11%	+3

Weighted average of how influential factors are in your investment decisions related to Automation, Systems, & Technology (5 = extremely influential)

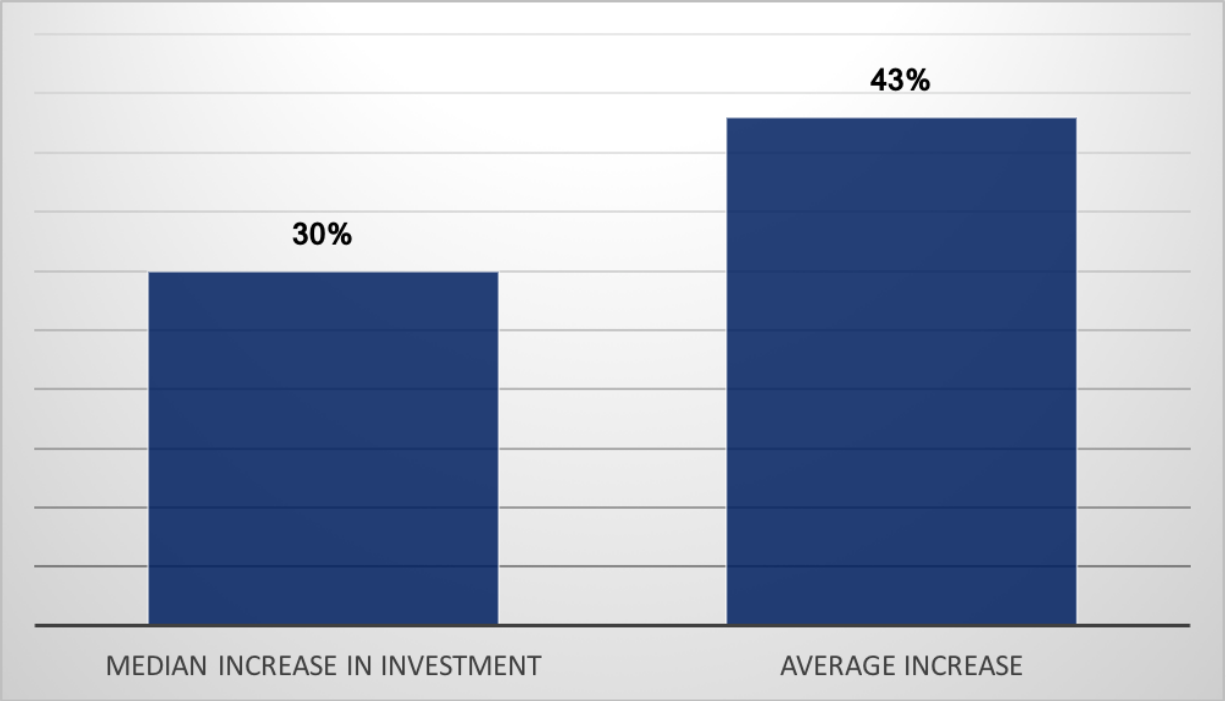




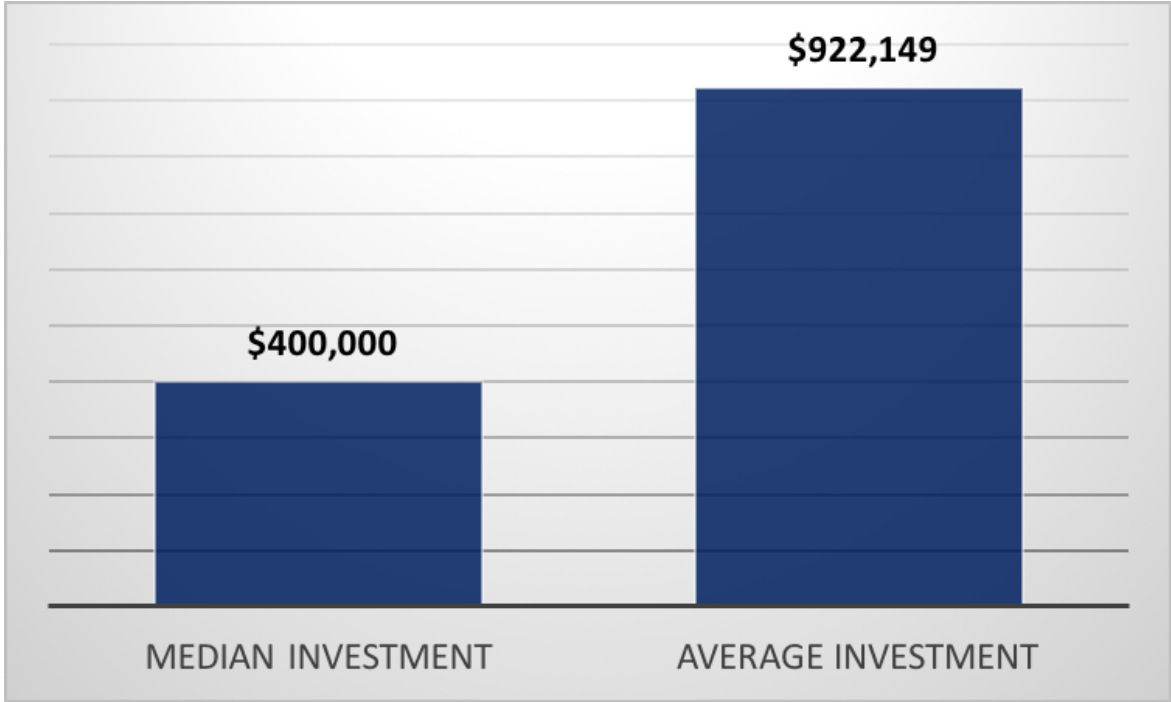
## Where do you plan to invest capital in the next 12 months?



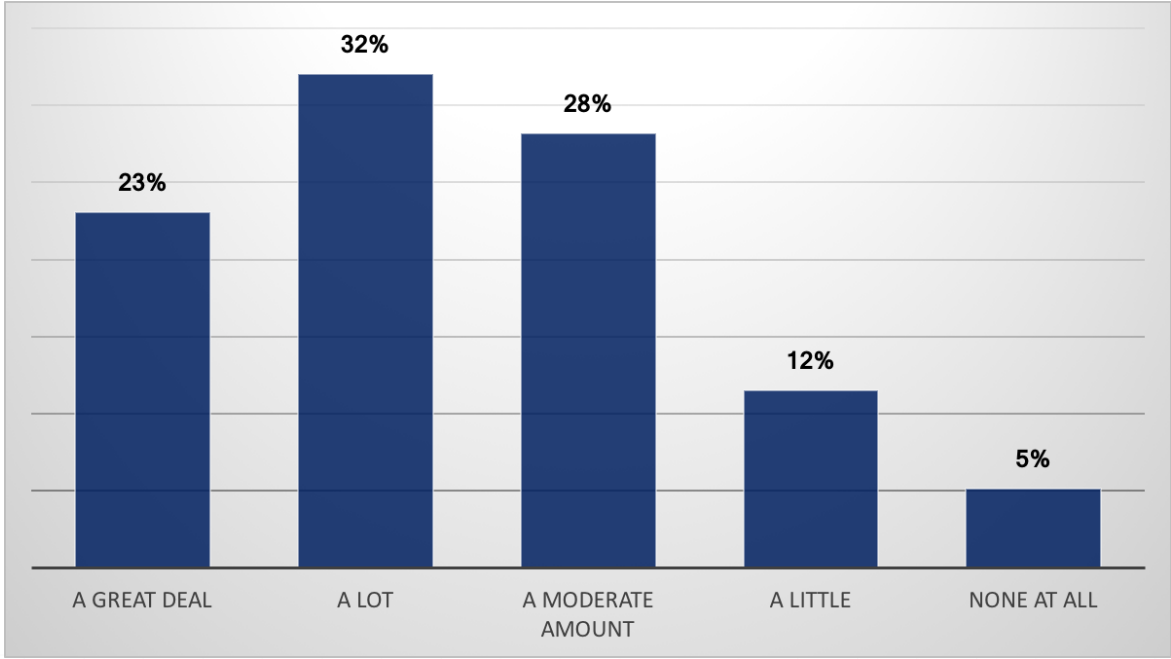
What % increase over the prior 12 months investment do you plan to make in Automation, Systems & Technology?



What dollar amount do you expect to invest in Automation, Systems & Technology over the next 12 months?

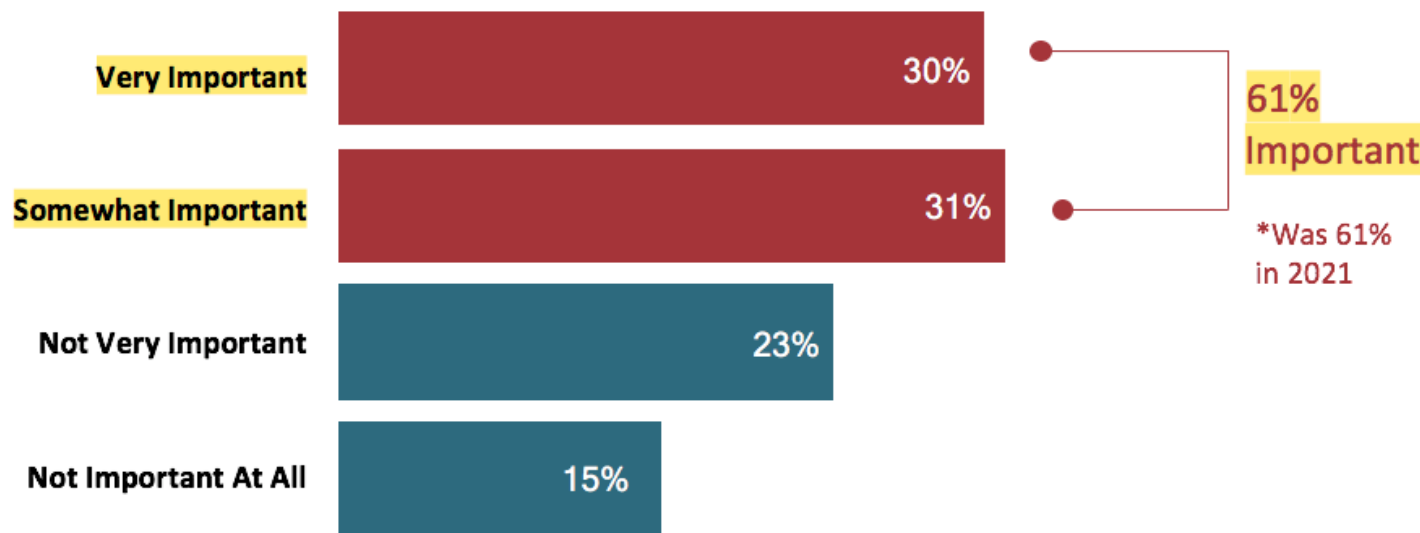


To what extent has the current economic situation affected your systems, technology or automation plans?



## A majority of manufacturing executives see automation as important to their company's future, with three-in-ten saying it's *very important*.

"Generally speaking, how important do you think automation will be to your company's future?"

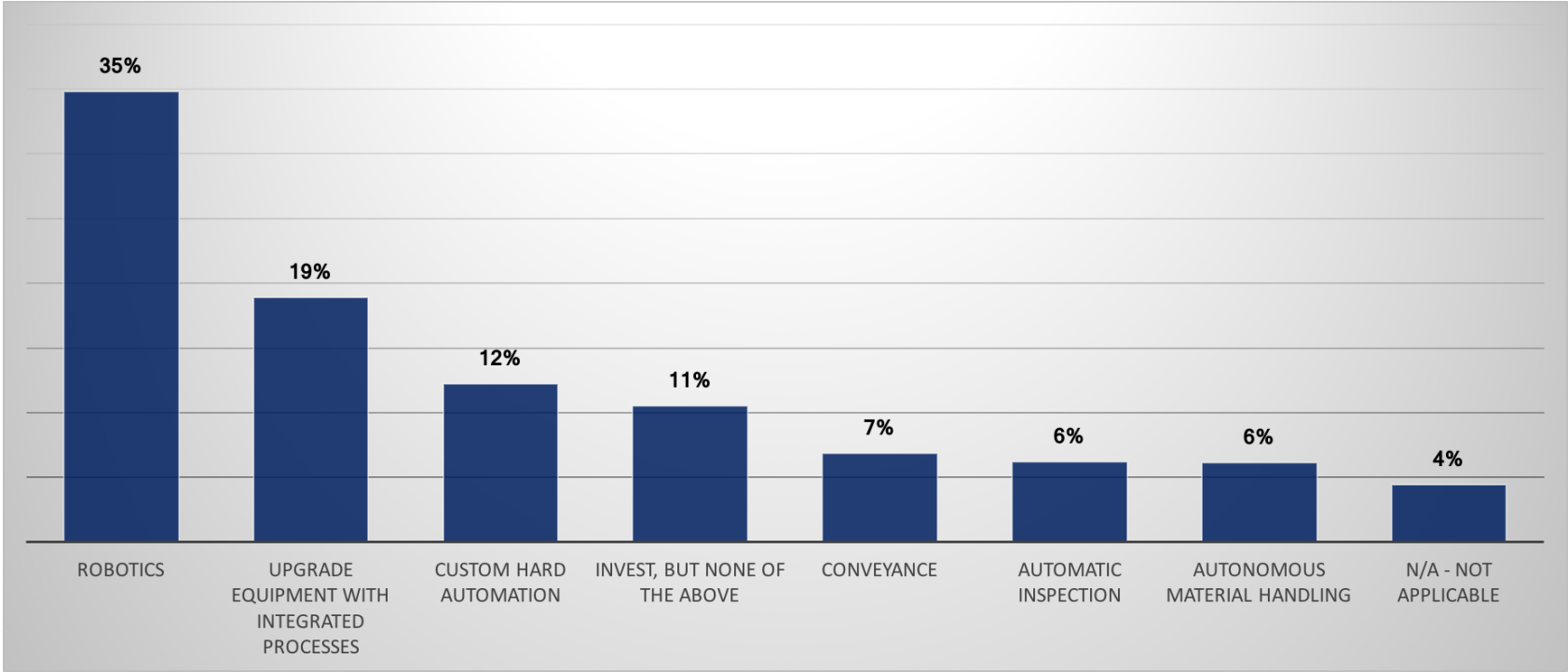


## Automation is clearly more important for larger companies.

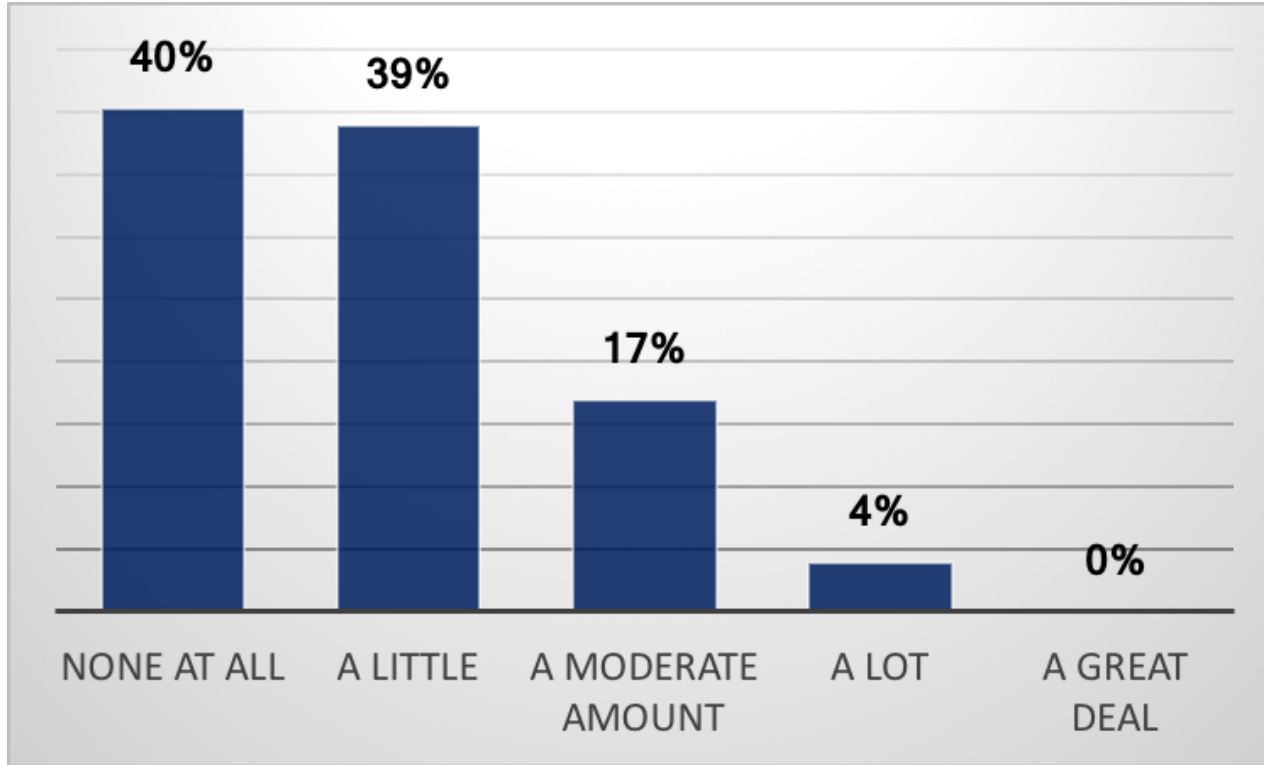
Importance of Automation By Type of Company

	Very Important	Total Important
1-49 Employees	4%	56%
50+ Employees	48%	79%
Revenue Under \$1 Million	14%	47%
Revenue \$1 - \$5 Million	28%	56%
Revenue \$5 Million +	49%	84%

# When investing in automation, where do you plan to invest (100 point allocation)?

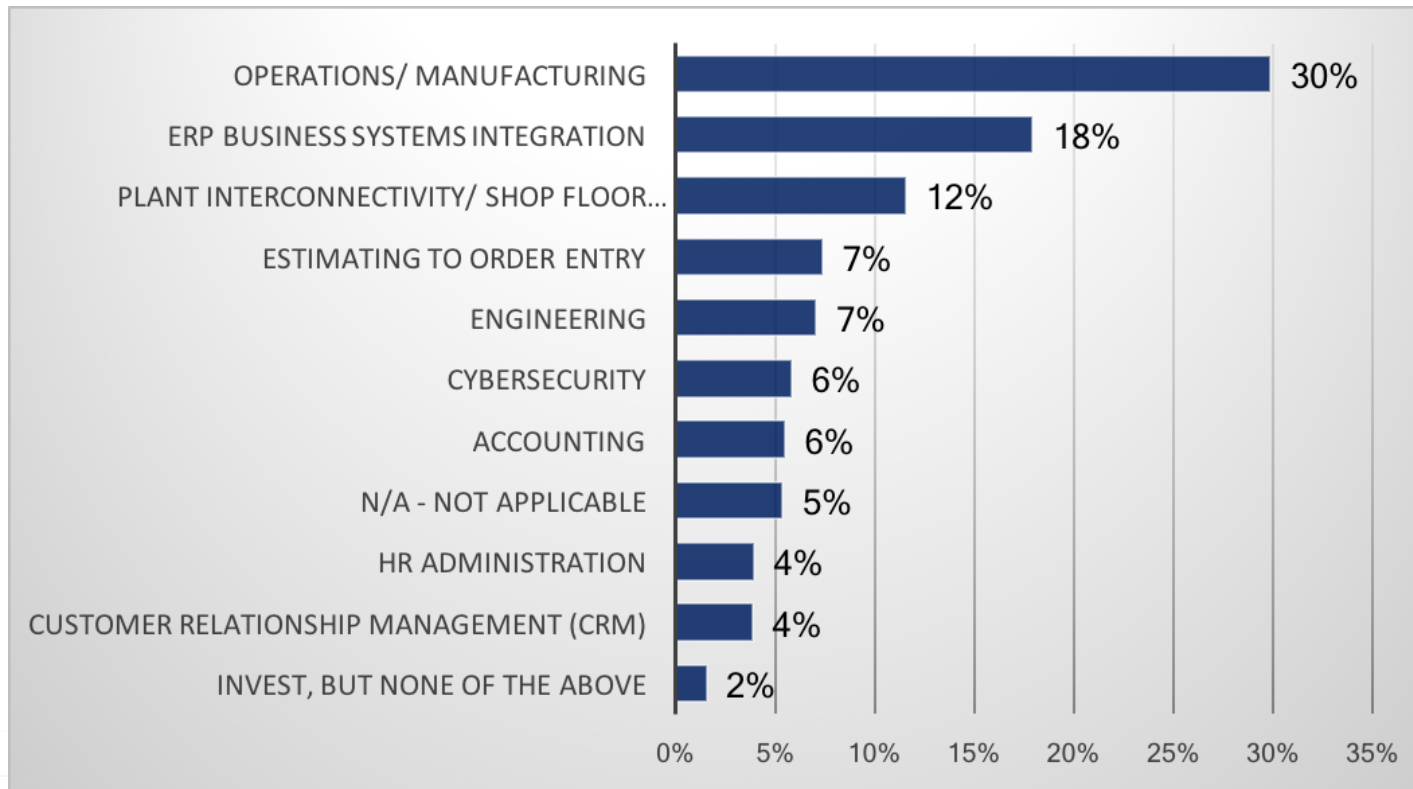


# What impact do you expect automation to have on headcount?

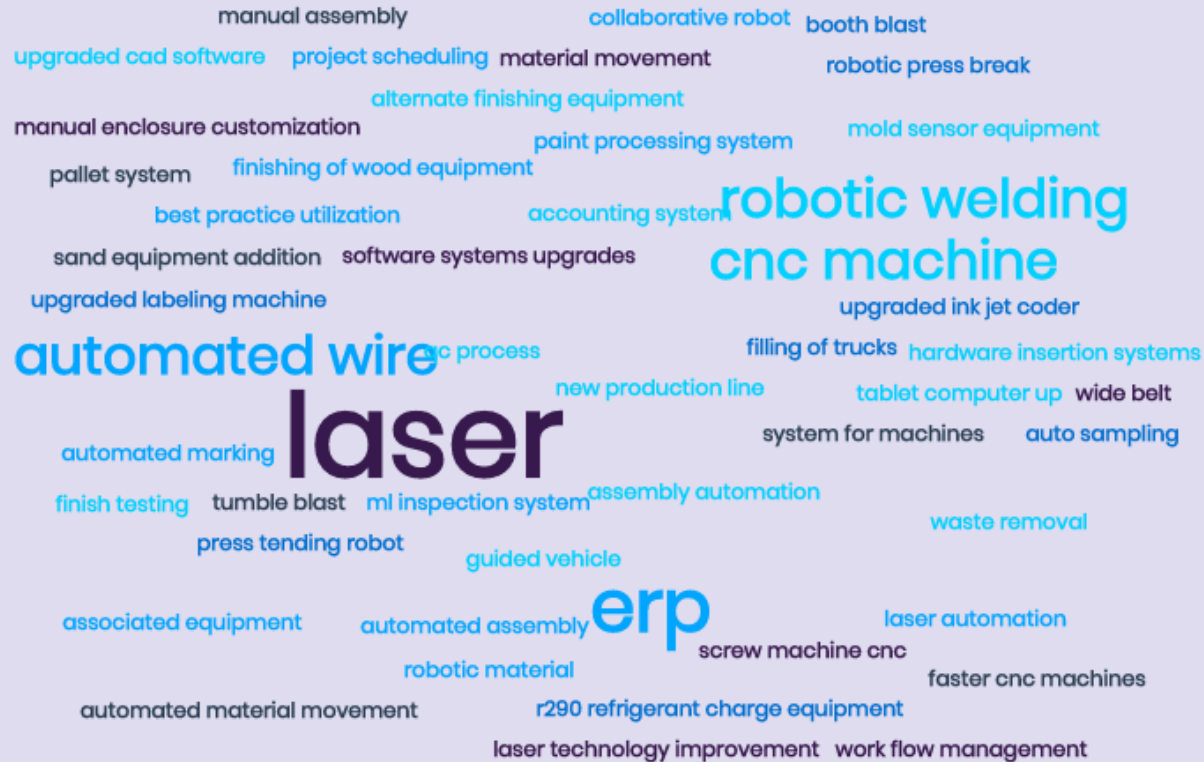




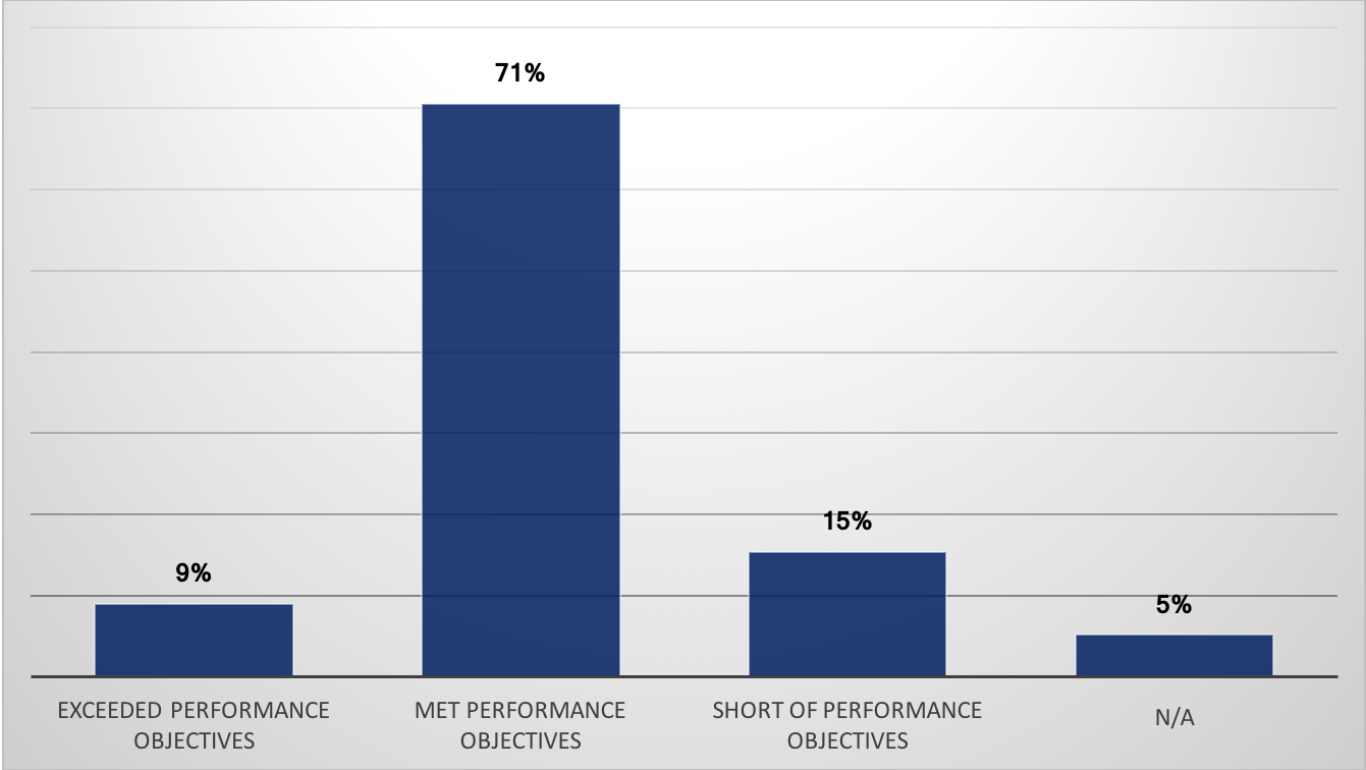
## When investing in systems, where do you plan to invest (100 point allocation)?



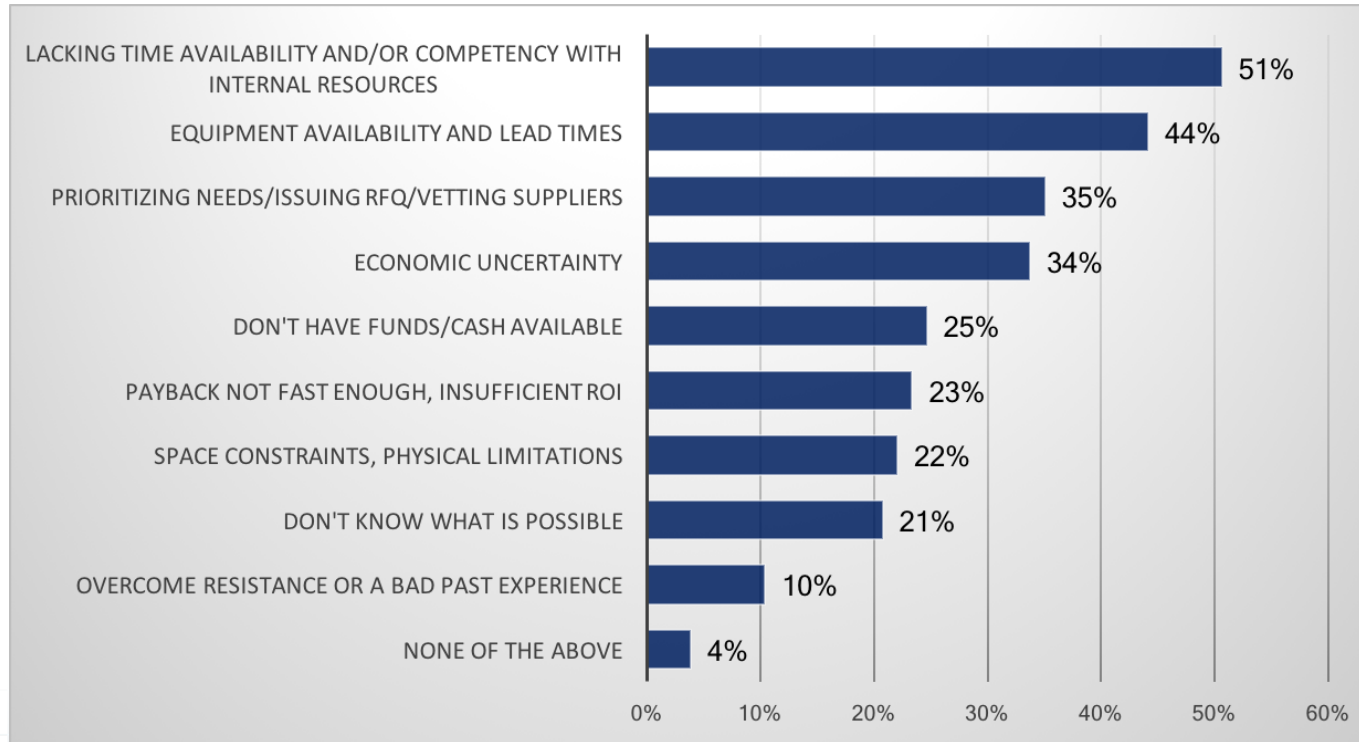
When investing in technologies where do you plan to invest (open-ended)?



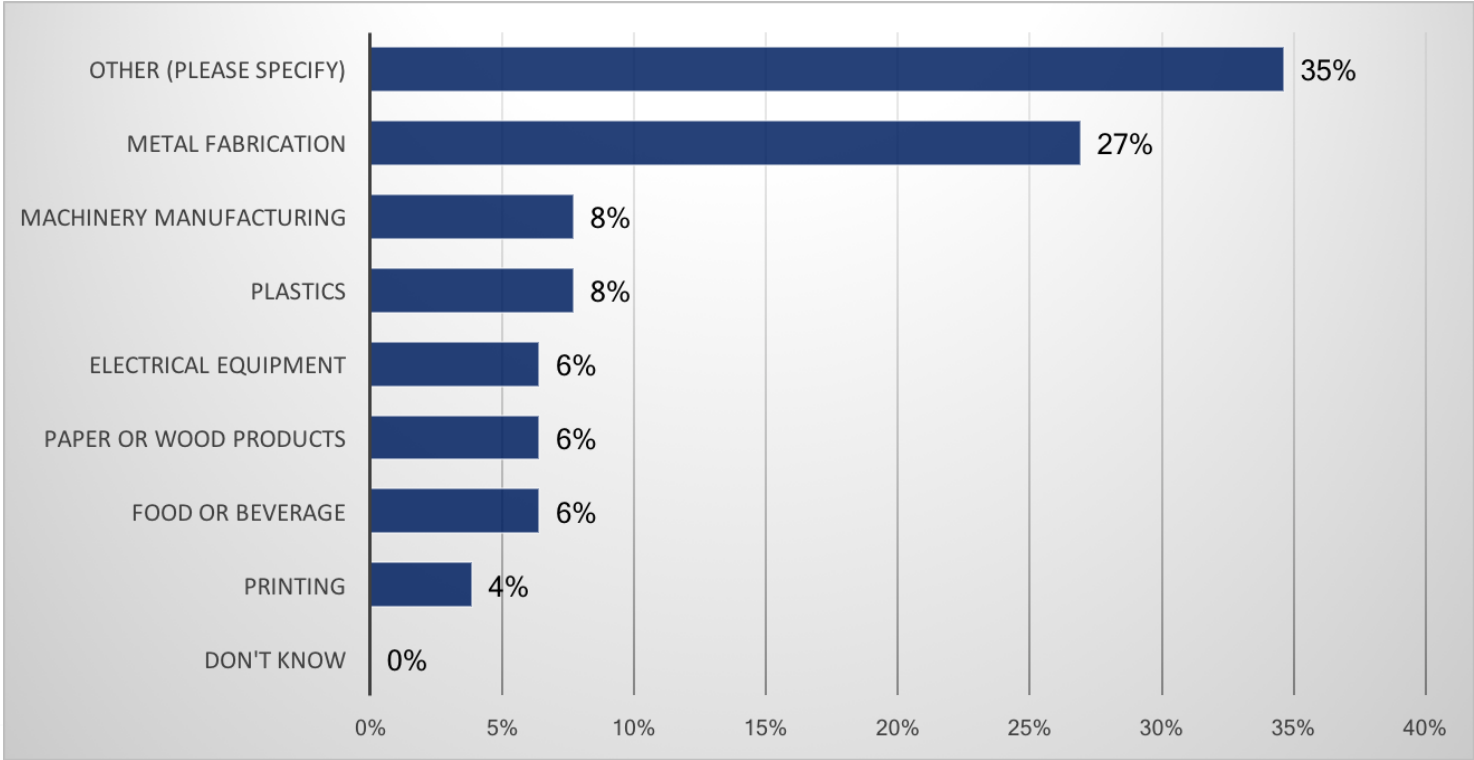
# Rating of the end result of your most recent implementation



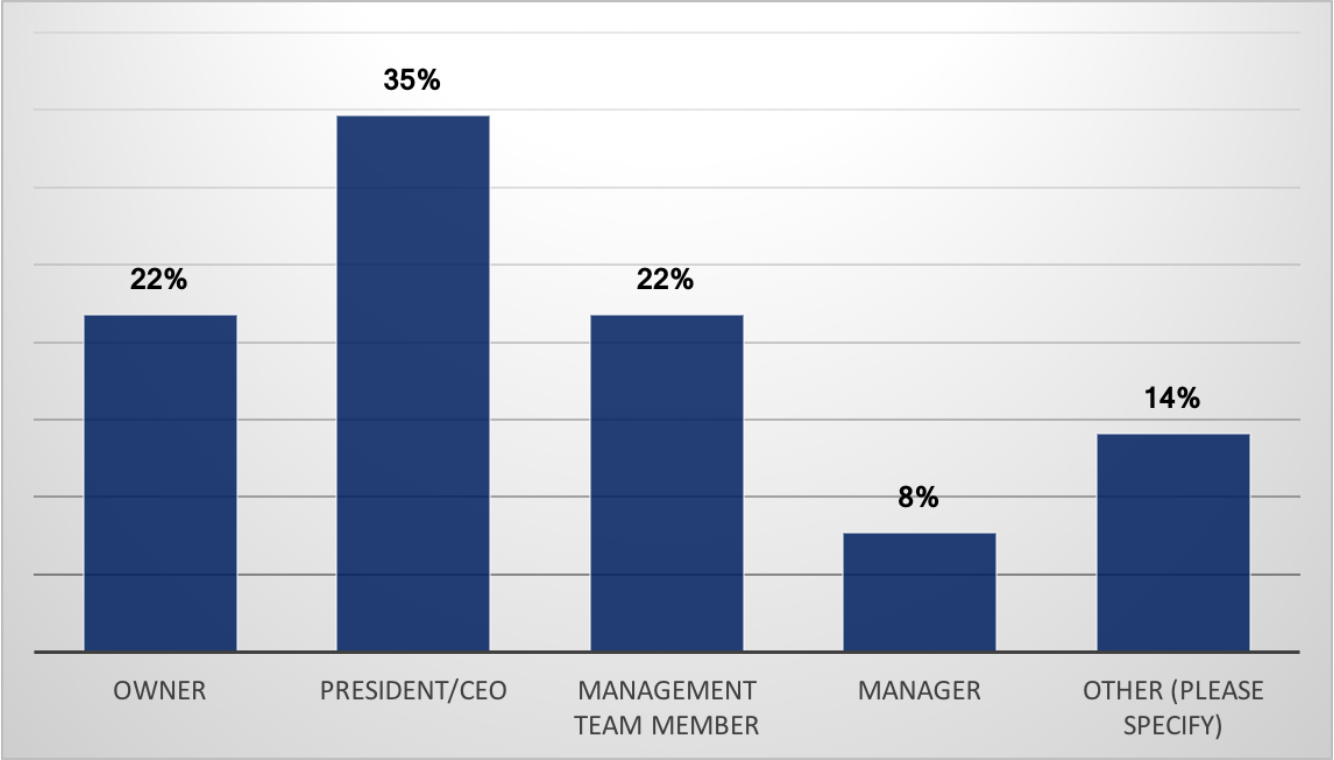
## Top three constraints to moving faster to implementation with automation, systems, and technology (% mentions)?



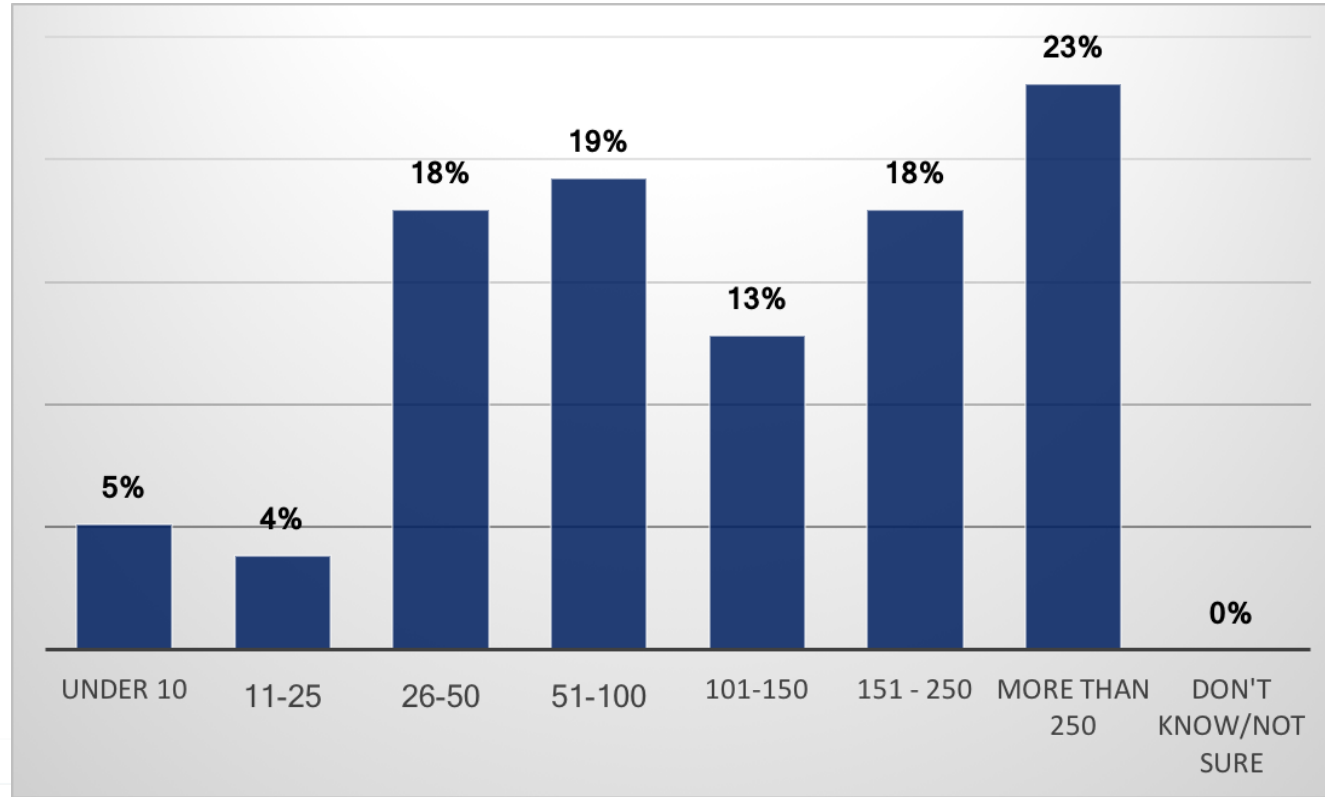
# Which of the following best describes your company's primary business?



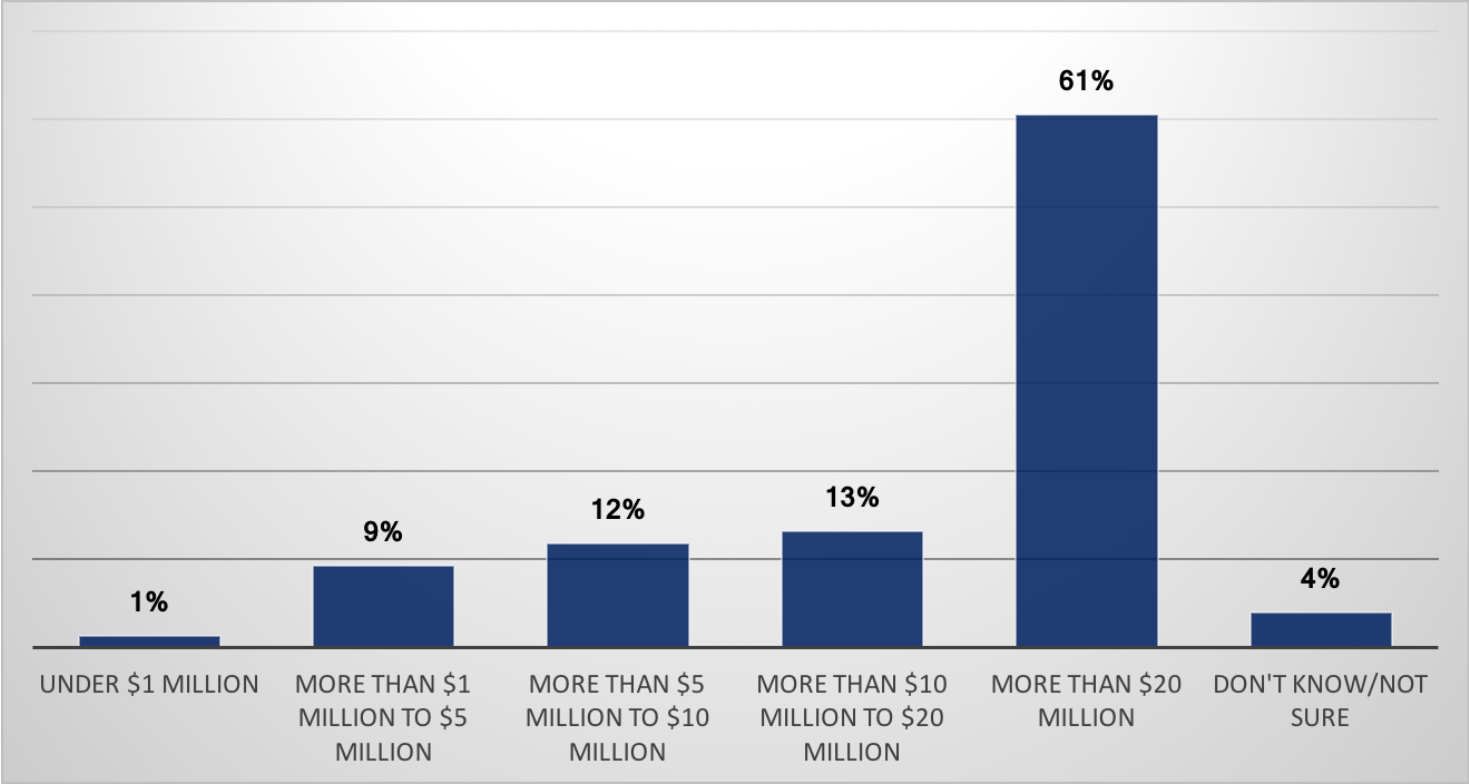
# What is your job title?



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

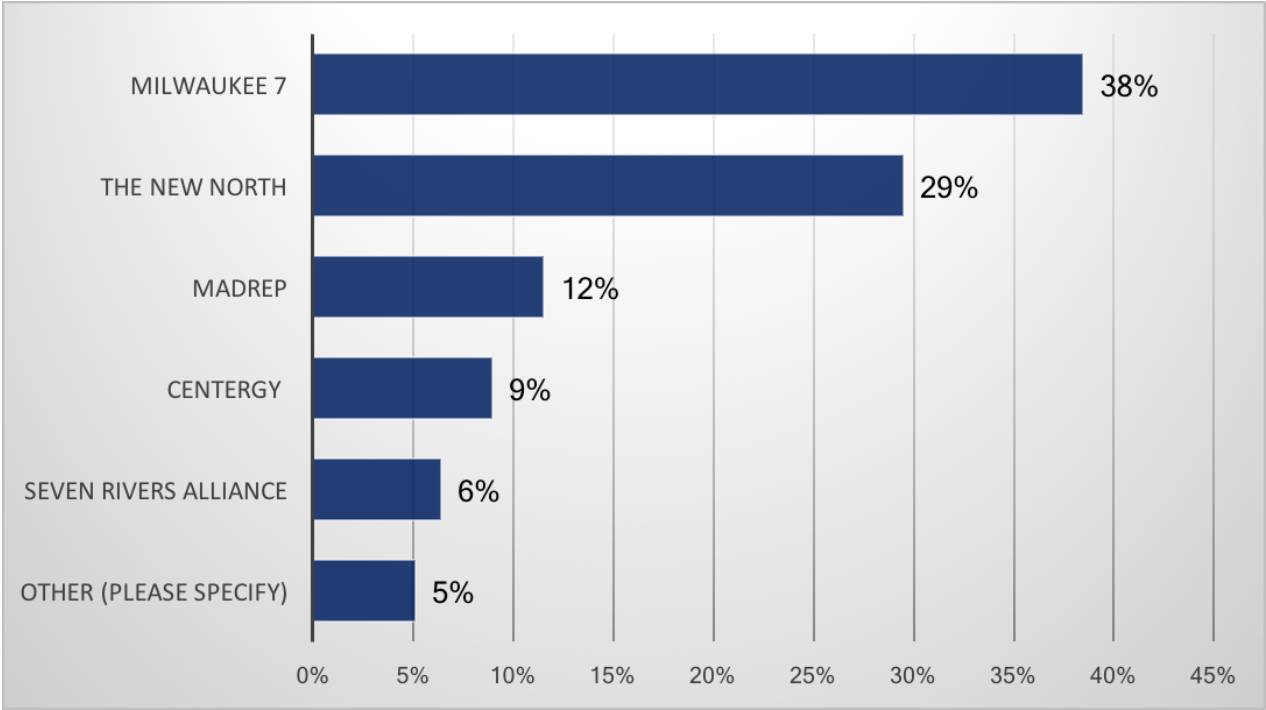


# What is your annual business revenue?





# Which of the following best describes your company's geographical location?



# QUESTIONS ?

# Upcoming Events & Webinars



For a full presentation of the 2022 Wisconsin Manufacturing Report please join us at the upcoming Manufacturing First Conference in Green Bay on October 26<sup>th</sup>, 2022

# Upcoming Events & Webinars



The poster features a background image of Lambeau Field. In the top left, the Wisconsin Sustainable Business Council logo is displayed with the text '2022 CONFERENCE'. To the right, the title '(R)Evolution of Sustainability' is shown above the tagline 'BRINGING THE GREEN TO GREEN BAY'. The date 'NOV. 16' is prominently displayed in the center, with 'LAMBEAU FIELD' below it. Further down, it says 'RECEPTION NOV 15' and 'MIRON CONSTRUCTION TITLETOWN, WI'. At the bottom, a dark banner contains the text: 'Cut Costs, Reduce Waste, Attract Talent, and Reach New Markets with Sustainability!'.

**Wisconsin Sustainable Business Council**  
2022 CONFERENCE

**(R)Evolution of Sustainability**  
BRINGING THE GREEN TO GREEN BAY

**NOV. 16**  
LAMBEAU FIELD  
RECEPTION NOV 15  
MIRON CONSTRUCTION  
TITLETOWN, WI

**Cut Costs, Reduce Waste, Attract Talent, and Reach New Markets with Sustainability!**

Learn about reducing costs, eliminating waste, and saving energy while also lowering your company's environmental impact at our upcoming Wisconsin Sustainable Business Conference in Green Bay on November 16<sup>th</sup>.

# Thank You!