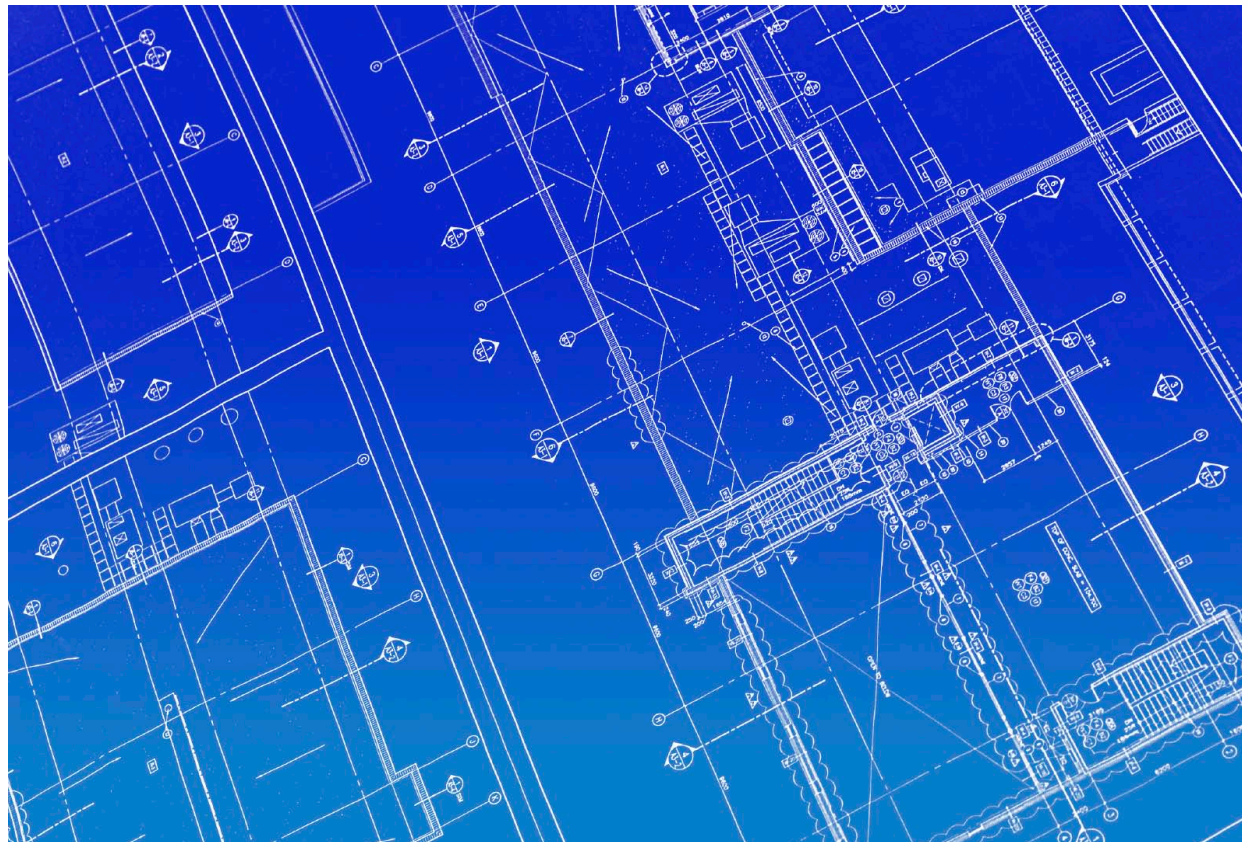


Public view on manufacturing

2009 annual index



Executive Summary

“Public view on manufacturing” is a new annual index developed by Deloitte in partnership with The Manufacturing Institute that assesses public perceptions about the key strengths and challenges of U.S. manufacturing. The index reveals a wide perception gap between the public’s highly positive views of manufacturing’s contributions to America’s prosperity and their negative views about pursuing a career in manufacturing.

Of the 1,000 “average Americans” surveyed, the majority (71 percent) view manufacturing as a national priority with 59 percent believing that the United States manufacturing industry effectively competes on a global scale. The public’s ranking of manufacturing as the top industry of importance to our economy, as well as its belief that U.S. manufacturers can compete globally, is very telling. Americans clearly still believe that manufacturing remains the backbone of the economy.

While Americans view manufacturing as the most important industry for a strong national economy, the results showed that they are not pursuing careers in manufacturing. Only 17 percent named manufacturing as among their top two industry choices to start a career, and only 30 percent of parents said they would encourage their children to pursue jobs in manufacturing. These are jobs Americans apparently want for their friends and neighbors — but not for themselves or their family members. America’s belief that manufacturing jobs are not clean, safe or interesting reflects a fundamental lack of understanding about modern manufacturing.

Finally, though Americans believe manufacturing is disadvantaged in the areas of corporate tax policies (46 percent), trade policies (45 percent) and general government business policies (45 percent), they are adamant on what gives the United States the upper hand. By far, the public sees technology use and availability (77 percent), skilled workers (74 percent) and energy availability (72 percent) as resources that give the nation its competitive edge.

If you have any questions or would like more information, we welcome the opportunity to speak with you.

You may also visit: www.deloitte.com/us/mfgimageindex

Best regards,

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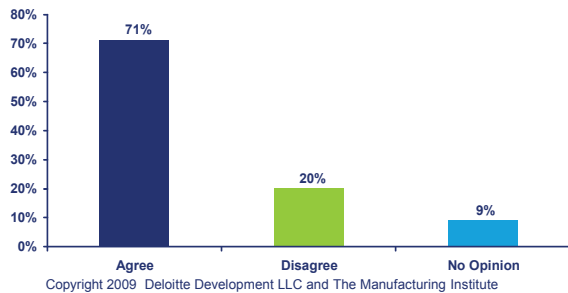
Methodology

The “Public view on manufacturing” study was commissioned by Deloitte in partnership with The Manufacturing Institute and conducted online by an independent research company in May 2009. The survey polled a nationally representative sample of 1,000 Americans across 50 states and has a margin of error for the entire sample of plus or minus three percentage points.

Key findings

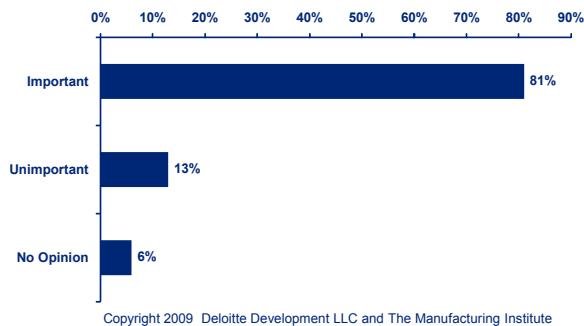
1. Over 70% of respondents agreed that developing a strong manufacturing base should be a national priority.

Developing a strong manufacturing base should be a national priority

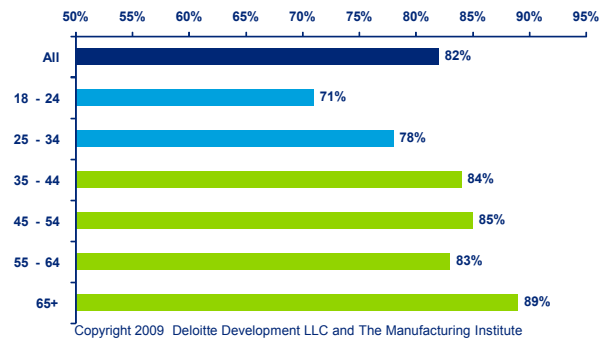


2. Over 80% believe that America's manufacturing base is either important or very important to their standard of living and to economic prosperity.

The importance of America's manufacturing base to our standard of living

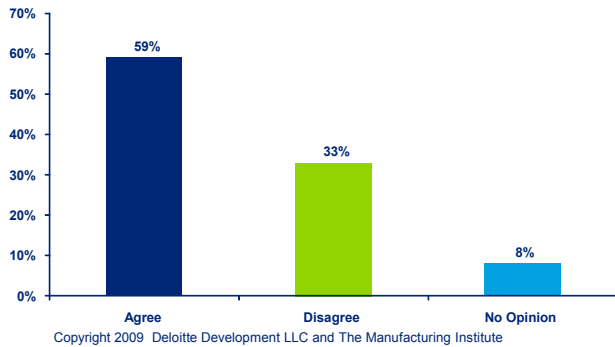


% of respondents, by age group, who agree that America's manufacturing base is important to our economic prosperity



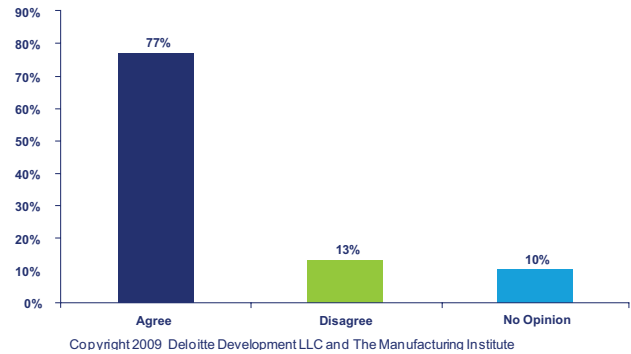
3. Nearly 60% believe the U.S. can compete globally in manufacturing today.

The U.S. manufacturing industry can effectively compete globally



4. However, 77% of respondents think the U.S. needs a more strategic approach to the development of its manufacturing base.

The U.S. needs a more strategic approach to the development of its manufacturing base



5. Relative to six other industries, manufacturing was seen as the most important industry to maintaining a strong national economy, followed in order by (2) technology, (3) energy, (4) health care, (5) financial services, (6) retail, and (7) communications.

Domestic industries that are most important to the US in helping to maintain a strong national economy

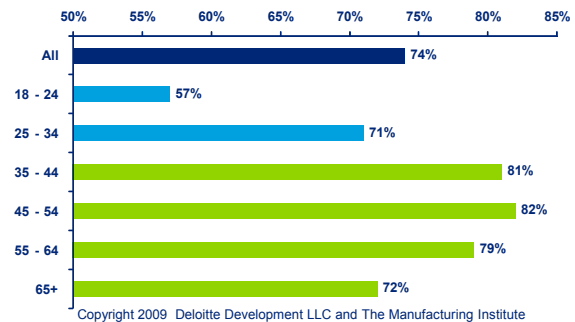
Industry	Rank
Manufacturing Industry	1
Technology Industry	2
Energy Industry	3
Healthcare Industry	4
Financial Services Industry	5
Retail Industry	6
Communications Industry	7

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Aggregate ranking of sectors by all respondents

6. 66% of respondents think manufacturing today is "high tech."

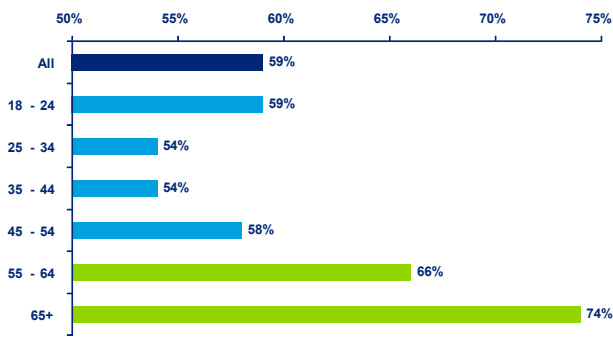
% of respondents, by age group, who agree that the manufacturing industry is high tech



Youngest Americans are less likely to think manufacturing industry is high tech

7. And nearly 60% agree that manufacturing requires well educated and highly skilled workers.

% of respondents, by age group, who agree that the manufacturing industry requires well educated and highly skilled individuals



8. When asked what type of new facility they would support if they could create 1,000 new jobs in their community, a manufacturing facility was ranked number (1), followed in order by (2) technology development center, (3) energy production facility, (4) health care facility, (5) retailing center, (6) communications hub, and (7) financial institution.

If you could create 1,000 new jobs in your community by establishing a new facility, what type of facility would you support?

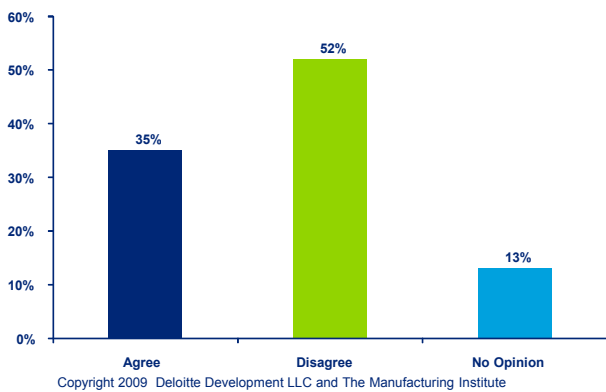
Facility	Rank
Manufacturing Facility	1
Technology Development Center	2
Energy Production Facility	3
Healthcare Facility	4
Retailing Center	5
Communications Hub	6
Financial Institution	7

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Aggregate ranking of sectors by all respondents

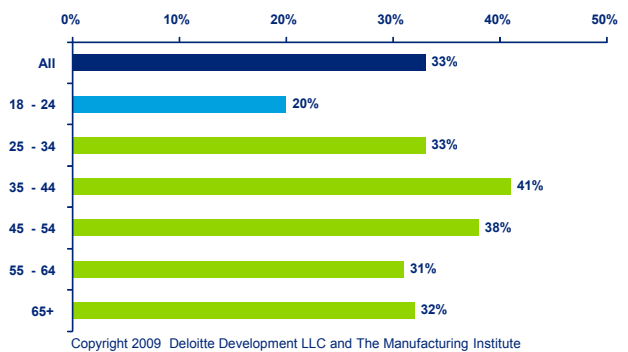
9. But only a little over 1/3 of respondents believed manufacturing jobs are higher paying than other industries.

Manufacturing jobs are higher paying than jobs in other industries



10. And only 1/3 of respondents believed manufacturing jobs are clean and safe.

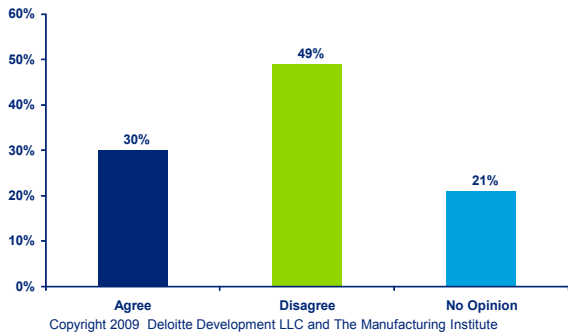
% of respondents, by age group, who agree that manufacturing jobs are clean and safe



However, youngest Americans are least likely to agree manufacturing jobs are clean and safe

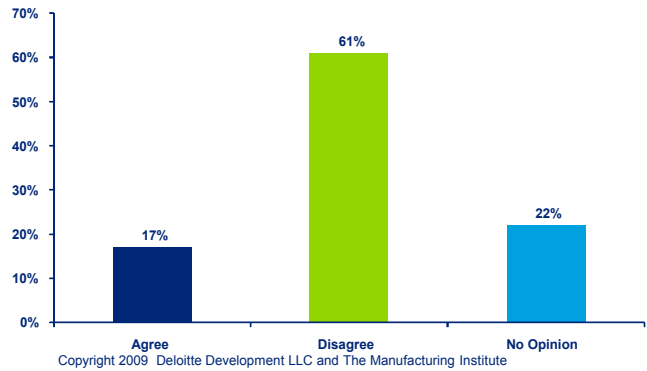
11. Less than 1/3 said they would encourage their children to pursue a career in manufacturing.

I would encourage my child to pursue a career in manufacturing



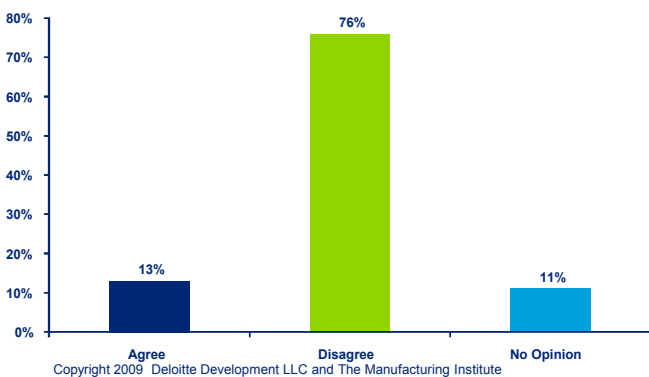
12. Sadly, only 17% said the school system in their community encourages students to pursue careers in manufacturing.

The school system in my community encourages students to pursue careers in manufacturing



13. And, only 13% said their own parents encouraged them to pursue careers in the manufacturing industry.

My parents encouraged me to pursue a career in manufacturing



14. The manufacturing industry ranked 5th on the same list of seven industries they would pick if they were to start their careers today. The ranking of all industries (1) technology, (2) health care, (3) energy, (4) communications, (5) manufacturing, (6) financial services, and (7) retail.

If you were to start your career today, what industry would you choose to enter?

Industry	Rank
Technology Industry	1
Healthcare Industry	2
Energy Industry	3
Communications Industry	4
Manufacturing Industry	5
Financial Industry	6
Retail Industry	7

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Aggregate ranking of sectors by all respondents

15. Respondents felt the top 5 "ADVANTAGES" U.S. manufacturers have competing in the global marketplace are:

- (1) Technology use and availability
- (2) Skilled workers
- (3) Energy availability
- (4) Natural resources
- (5) Creativity

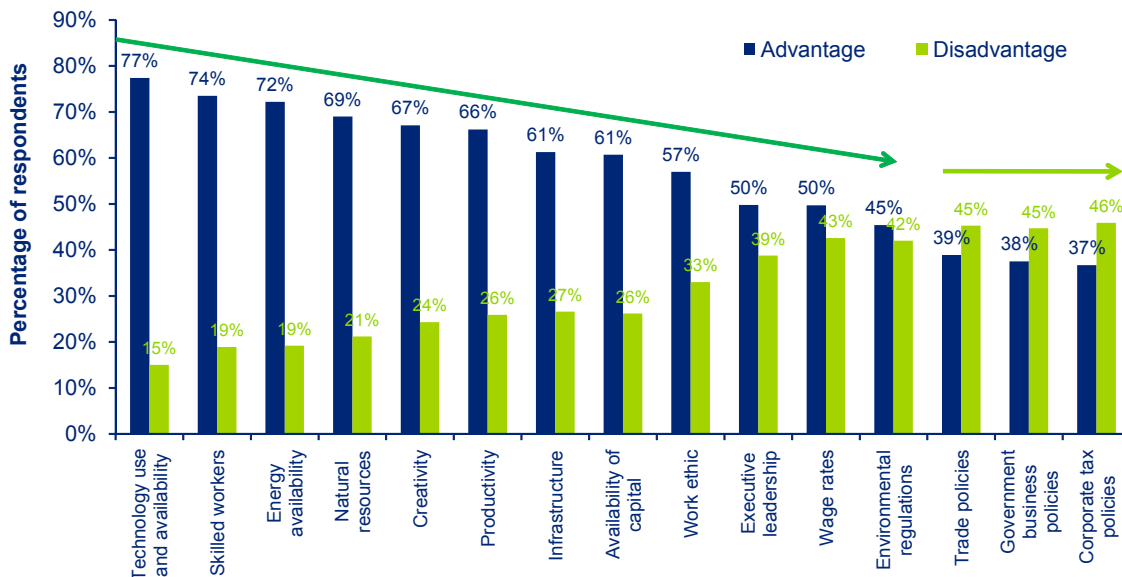
Note: "productivity" ranked sixth.

16. Respondents felt the top 5 "DISADVANTAGES" U.S. manufacturers have competing in the global marketplace are:

- (1) U.S. corporate tax policies
- (2) Government business policies
- (3) Trade policies
- (4) Environmental regulations
- (5) Wage rates

**U.S. Manufacturing's Global Competitiveness:
Helped by Technology, Skilled Workers, Natural Resources & Hurt by Various Government Policies**

Areas where U.S. manufacturing has an advantage or a disadvantage in the global marketplace



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About The Manufacturing Institute

The Manufacturing Institute is a non-partisan 501(c) (3) affiliate of the National Association of Manufacturers focused on delivering leading-edge information and services to the nation's manufacturers through its Center for the American Workforce and its National Center for Manufacturing Research. Visit www.nam.org/institute