Coastal BEST

2009 Survey Results
What does BEST stand for?

\[ B = Business \]
\[ E = Enterprise \]
\[ S = Support \]
\[ T = Team \]
Why was BEST initiated?

- Current economic conditions warrant a more formalized means of interfacing with existing industry
- Need to bring local and state resources to bear to assist businesses in meeting their challenges
- With downsizing prevalent across the country, wanted to initiate a proactive effort to stave off downsizing and to support growth and development of local companies
BEST is...

...more than just a survey or study...it is a collaborative system for supporting area business and industry
Resource Partners...

- Brunswick-Golden Isles Chamber of Commerce
- Brunswick & Glynn County Development Authority
- Georgia Dept. of Economic Development
- Georgia Institute of Technology
- Golden Isles Career Academy
- Altamaha Technical College
- Georgia Quick Start
- College of Coastal Georgia
- University of Georgia Archway Partnership
- Georgia Power Company Economic Development
BEST Benefits

- Coastal BEST provides a formal platform for resource providers to interact with companies that can benefit from their programs.
- Allows resource providers and local stakeholders to become better educated about the needs/challenges faced by business and industry (allowing them to be more responsive).
BEST Benefits

- Allows local leaders to understand the perceptions that industry has of Glynn County as a place to operate (resulting in comprehensive strategies/efforts to address them)
- Allows companies to become better educated about resources that may be of value to them (resulting in better utilization of the programs, and ultimately, healthier businesses)
Survey Parameters

Fifty (50) interviews were conducted with local business/industry partners employing ten or more employees. Chief Executive Officers (CEOs) and/or higher level management were interviewed.

Market penetration of 78% (50 of 64 firms of record)

Surveyed companies represent a total workforce of 3,600 jobs within the community.
Survey Methodology

• Synchronist specialized survey instrument/software
• Customized questions added for local benefit
• Interviews of one hour
• Two team members conducting interviews
Survey Methodology

Respondents were assured that their individual responses would not be shared outside of the BEST Team and team members have pledged their confidentiality. Only aggregate or generalized information across the depth and breadth of the study will be presented here.
Survey Methodology

- Survey consisted of scaled responses as well as open-ended questions
- It is recognized that individual responses to the instrument represent the highest level of importance
National Trend

- *Site Selection* Magazine found that in 57% of manufacturing capacity increases in the U.S. in 2006 (50 or more jobs or at least 20,000 square feet) were expansions of existing facilities.

*Site Selection, 2007*
Our opportunities are significant

Twelve surveyed companies (24%) indicated plans/desire to expand:

- Total planned investment: $34,145,000
- Total estimated new jobs: 495
- Total estimated new space: 156,500 sq. ft.
Workforce
Workforce

Hands down… the single biggest obstacle is finding an adequate supply of workers with the right skills and right attitude. “

--Audrey Pennington in Site Selection
16% of respondents indicated difficulty in finding employees to meet their requirements. In the majority of instances, this has been abated by the recent economic downturn, whereas in other situations it has not
20% of respondents indicated problems with the quality of the local workforce, citing predominately workplace ethics issues and lack of core and relationship skills.

Conversely, 40% of respondents indicated a high degree of satisfaction with the quality of the local workforce.
Workforce Stability

The stability of the local workforce was found to be a community strength, with only 6% of respondents scoring the community as below average in this area.

66% of respondents scored workforce stability as better than average.
Productivity of the local workforce was an area of particular strength within the Brunswick/Glynn Community as 76% of respondents scored the productivity of the workforce as better than average.
Customized questions

Are you aware of the establishment of the Golden Isles Career Academy?

90% of respondents (45 of 50) indicated they were aware of the creation of the Academy.
Customized questions

Would you like more information regarding the Golden Isles Career Academy?

88% of respondents indicated they would like to receive more information regarding the Academy.
Are you aware of Altamaha Technical College’s expansion of service delivery area to include Glynn County?

78% of respondents indicated they were aware of this expansion, with 18% indicating that they were unaware.
Would you like more information regarding Altamaha Technical College?

44% of respondents indicated they would like to receive more information regarding the Altamaha Technical College.
Customized questions

Are you aware of the College of Coastal Georgia’s becoming a 4-year institution?

86% of respondents indicated they were aware of this enhancement, with 12% indicating they were unaware.
Customized questions

Would you like more information regarding the College of Coastal Georgia?

76% of respondents indicated they would like to receive more information regarding the College of Coastal Georgia.
<table>
<thead>
<tr>
<th></th>
<th>Number</th>
<th>Percent</th>
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<tbody>
<tr>
<td>Companies providing training</td>
<td>35</td>
<td>70%</td>
</tr>
<tr>
<td>Companies increasing spending for training</td>
<td>4</td>
<td>11%</td>
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<tr>
<td>Companies with stable training budgets</td>
<td>31</td>
<td>89%</td>
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Technology
While generally pleased with telecommunications/voice capabilities, 16% of respondents rated capabilities as below average.

Satisfaction with cell phone service scored somewhat lower, with 22% of respondents ranking this capabilities as below average.

Internet access and speed appears to be good overall with only 10% of respondents ranking these capabilities below average.
In reviewing responses, it appears that there are geographic areas of the community in which dissatisfaction with technology infrastructure is notably higher.
Utility Services
Utility Services

Availability & cost of water received relatively high marks with 10% of respondents indicating concerns. Of those, access to public system water was the predominant issue.

Sewage was an area in which greater concern was expressed, with 22% of respondents expressing some level of dissatisfaction, once again primarily related to access to public systems.
Utility Services

Few concerns were expressed in regard to natural gas and electric service.

In regard to electric service, 16% expressed concerns primarily related to cost. Many of these respondents expressed confusion as to how residential rates and industrial rates differed.
Public Services
Public Services

Police and fire protection received very high marks overall. 16% of respondents did rank police protection as below average, though a very strong percentage of respondents rated it excellent.

A high level of overall satisfaction was expressed in regard to fire protection services.
Public Services

Ambulance/Paramedic services were also highly rated with respondents with all respondents indicating satisfaction or excellence in regard to these services.

51% of respondents rated health care services in the community as excellent, with 33% expressing satisfaction, and 16% rating them as below average. Where concern was expressed, it was primarily centered around the cost of services.
Public Services

Availability/Quality/Cost of child care in the community was not expressed to be an area of concern to employers surveyed.

In regard to K-12 education, 45% of respondents rated services as better than average, with 24% indicating general satisfaction. 31% rated K-12 services as below average, although many respondents indicated that service were “improving”.
Public Services

Postsecondary institutions (technical college, College of Coastal Georgia) were rated strongly by respondents and were clearly seen as strong community assets.
Public Services

Traffic control and transportation issues also received favorable response from respondents, although 12% did express concern about some local streets and thoroughfares.

Interstate access was seen as an extremely strong selling point for the community.
Public Services

Airline passenger service received generally favorable response, although 29% did rate the service as needing improvement.

Air cargo services were seen as a particular strength of the community, as was trucking service, although some respondents indicated the need for more drivers with Commercial Driver’s License (CDL).
Public Services

Property tax assessments were generally seen as favorable, although 27% of respondents indicated dissatisfaction.

Zoning changes and permit processes were also seen as generally favorable, although 18% indicated some level of concern or dissatisfaction. Many of these respondents indicated concerns about the industrial/commercial/residential interface.
Public Services

Regulatory enforcement and community planning also received generally favorable response, although 12% of respondents (respectively) indicated concern--primarily in regard to the residential/commercial interface.
Public Services

Community services and County services also received generally favorable response. 57% of respondents rated county services as better than average and only 2% indicated any level of concern.
Public Services

Extremely high levels of satisfaction were found for the Chamber of Commerce, Development Authority, and state workforce services (all polled separately).
Business Dynamics
Sales

![Pie chart showing sales categories]

- 36% Increasing
- 31% Stable
- 31% Decreasing
- 2% No response
Product Cycle

- Declining: 22%
- Maturing: 45%
- No response: 3%
- Emerging: 30%
Primary Markets

![Pie chart showing primary markets: International 36%, National 36%, Regional 21%, Local 5%, No Response 2%]
8 companies will spend <3% of their budget on R&D

5 companies will spend 3-6% of their budget on R&D

4 companies will spend >6% of their budget on R&D
Exporting

- No Response: 49
- No Export: 18
- Stable: 12
- Increasing: 20
Importing

![Pie chart showing different response categories: No Response, Increasing, Stable, No importing.]

- No Response: 76.92%
- Increasing: 10.26%
- Stable: 10.26%
- No importing: 2.56%
Foreign Production by competitors

No response --- 82%
Stable--10%
Increasing--8%
Business Change
Ownership and management changes were relatively few, with six (12%) respondents indicating change during the reporting period (36 months).
Emerging Technologies

64% of respondents reported facing technological change of some import

- Updating business information systems
- Replacing employees with mechanization
- Adoption of new technologies
Leased Facilities

Sixteen (32%) respondents indicated that they lease facilities
As part of the survey, we did collect input regarding concerns and opportunities for local, state, and federal policy. These responses tend to be more company specific and do not lend well to generalization.
Common Themes

Responses to open ended questions identified the following common themes:

- Airport needs schedule/reliability
- Water & Sewer (water pressure, lack of infrastructure in key areas)
- Spotty cell phone coverage
- Vision for the community that embraces job creation, industry
Common Themes

- Urban blight
- Continued progress with education/workforce development initiatives
Much is already underway

- Sweeping change in postsecondary opportunities
- City committed to issues regarding urban blight
- Planning & collaboration in regard to water/sewer infrastructure needs (JWSC Master Plan)
- Continued commitment to advancing K12 Education (considering round 2 of ESPLOST)
Much is already underway

- CDL facilities under development
- Airport reports scheduling/reliability numbers similar to Savannah and approaching those of Jax and is actively seeking additional carrier
Much is already underway

- BEST Team has forwarded requested information regarding Career Academy, Altamaha Technical College, College of Coastal Georgia to employers
- Meeting has been held to debrief results with the BEST Team
- Meeting has been held with local leaders to discuss results and opportunities
To What extent will results be shared?

While aggregated data will be shared with our partners and local government, we take the pledge of confidentiality that we made to the industries that were interviewed very seriously. As such, we will NOT share individual company records with anyone without the permission of that company.
Questions?