

# 2018 SGIA Industry Benchmarking Report

## Garment Decoration Community



### Executive Summary

SGIA conducted its Industry Survey in January and February 2018. The goal of the survey was to evaluate the industry's current situation, identify trends and provide garment decorators with information for their business decisions today and strategic planning for the future. This report is based on the responses of 119 garment decorators from the United States and Canada.

The number of companies serving other businesses (58.0%) is slightly higher than the number of business-to-consumer companies (39.5%). The majority continues to focus on local and regional markets. The median number of employees is seven, and the median annual sales revenue is \$1,100,000, which is slightly lower than it was last year. This change could be due to the 20% increase in the number of small companies (participants with less than five employees). The number of survey participants with revenue between \$250,000 and \$1,500,000 has almost doubled compared to last year, with the same pattern represented in the "\$5,000,000–\$10,000,000" segment.

The number of companies owned by men has slightly decreased, whereas women- and mixed group-owned businesses have slightly increased in their representation among the survey respondents. The same trend was found for the management, sales and production departments.

Although companies use different types of technologies, they tend to rely more and more on digital technology. That said, the top print processes used by garment decorators continue to be screen printing (71.8%), embroidery (64.7%) and dye sublimation (37.6%).

The number of companies providing post-production/finishing services to their customers is almost twice as high (62.4% vs. 37.6%) as the number of those who do not. When printers exchange their services, they provide production services more frequently than post-production/finishing services. Bagging/tagging, fulfillment, sewing, grommeting and warehousing have been offered the most by garment decorators this year. More than three-quarters of the companies (78.0%) use at least half of their production capacity — an 18.5% increase from 2017.

More than two-thirds of respondents (68.7%) spent at least \$5,000 on equipment, and expected spending is on the rise. About four out of five respondents (78.5%) intend to spend either the same amount or more on the equipment. When making purchases, garment decorators used cash more frequently than they did last year. Company credit cards and bank loans were other frequently-used payment methods. The number of companies deciding to lease the equipment increased this year by 47%. Durability of

equipment, customer support and brand name/reputation continue to be the most important factors influencing equipment purchases.

Most garment decorators continue to serve the athletic, educational institution, business-to-consumer, nonprofit and corporate branding markets, which are considered to have the highest growth potential. T-shirts, performance wear, hats/caps and bags are the most popular end products for the majority of respondents — the first three were indicated as significant growth areas. Patches and appliqués are also increasing in popularity among the respondents.

Almost all the respondents accept checks, credit cards and cash as their primary payment methods. Debit cards and bank wire transfers were chosen by more than half of the respondents, while phone and mobile payments have also increased in popularity.

Thirty days is the maximum length for the credit terms among the printers, but about half of them require payment prior to or at the time of delivery. The median percentage of outstanding payments continues to be 5%.

Finding new customers, downward pressure on prices and recruiting/retaining production personnel were identified as the main barriers to growth. To stay competitive in production, companies tend to focus on reducing the costs, becoming a one-stop shop and adding new product lines. Referrals, company websites, social media and inside sales are used by at least two-thirds of the companies to attract new customers. The majority of respondents use Facebook, Instagram and Twitter. For the future, the focus is on trade shows and networking events. To stay competitive, companies tend to increase their internet presence, maximize the value of current customers, improve customer service and consider future geographic expansion.

With the median sales growth staying around 7%, at least two-thirds of the companies (68.1%) reported positive sales growth. About two-thirds of respondents (63.6%) reported increased production. The vast majority of the companies expect an increase in sales (89.4%) and production (89.4%) in the future, and about half expect the same for employment (47.0%) and prices for products sold (47.0%). Companies expect to hire more employees for their businesses and are optimistic about the industry and the economy.

This was another strong year for the industry. To overcome current barriers to growth, we encourage companies to explore new markets and extend product offerings while maintaining a focus on current customers.

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### Companies in General

There is a slight increase in the number of companies serving other businesses (8% increase). The number of in-plant printers is on the rise (Table 1). The vast majority of garment decorators continue to serve local (71.4%) and regional (58.0%) markets. The number of national accounts has decreased compared to last year, whereas the international markets are still served by about 20% of the companies (Table 2).

The median number of employees is 7, and the median annual sales revenue is \$1,100,000. This change could be due to the fact that the number of small companies — participants with less than five employees — has increased by about 20%. Whether those are new start-up businesses or older companies shrinking in size, we will find out in the future.

The number of survey participants with a revenue of more than \$250,000 and less than \$1,500,000 has almost doubled compared to last year, with the same pattern seen in the \$5,000,000 to \$10,000,000 segment. The number of companies making between \$10,000,000 and \$20,000,000, however, has decreased since last year (Graph 1).

The number of the companies owned by men has slightly decreased, whereas women- and mixed group-owned businesses have slightly increased in their representation among the survey participants (Graph 2). The same trend was found for the management, sales and production departments (Table 4).

**Table 1: Type of Business**

Garment Decorators: Type of Business	2018	2017
Business-to-business	58.0%	53.7%
Business-to-consumer	39.5%	45.1%
In-plant printer	2.5%	1.2%

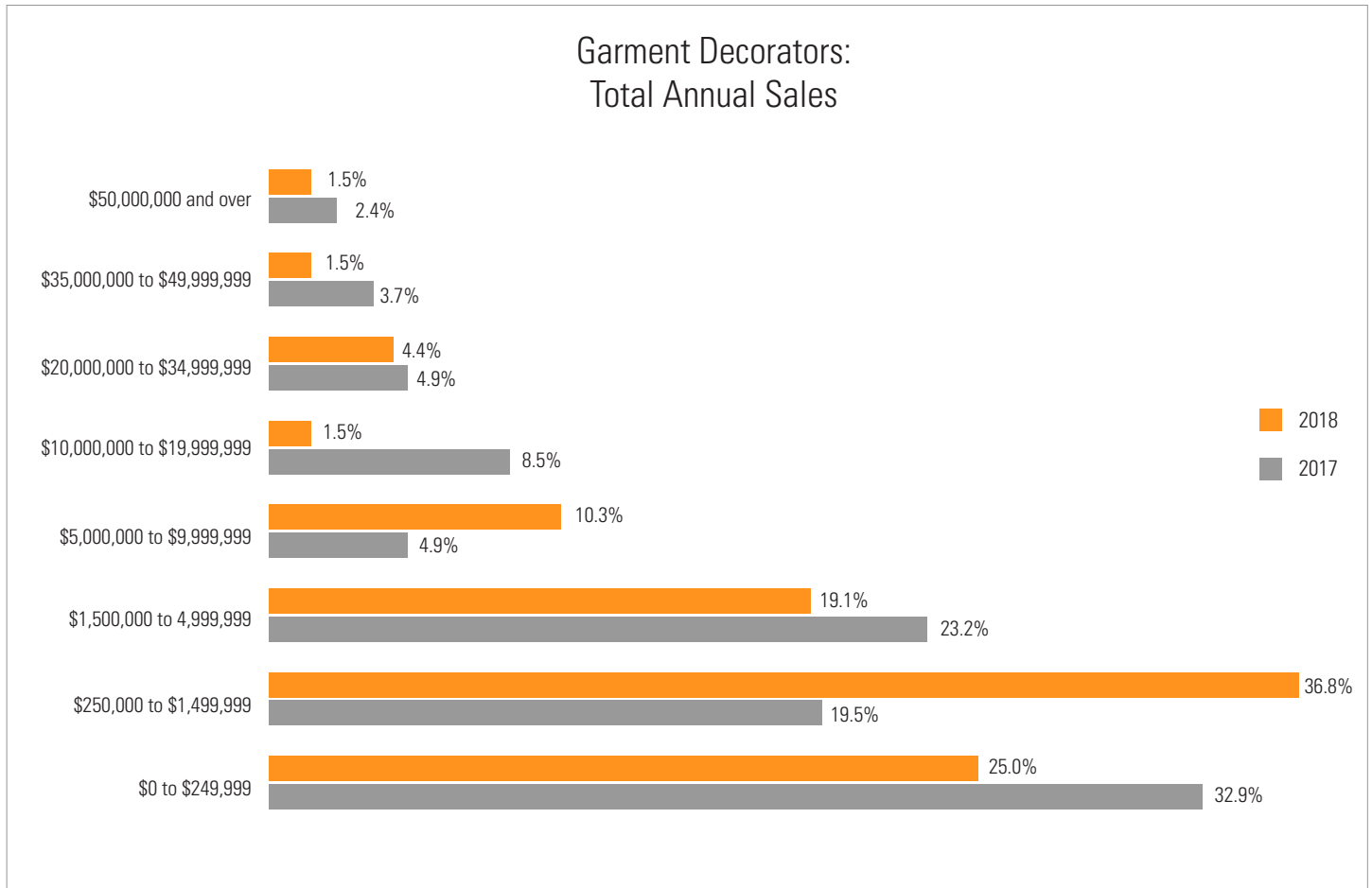
**Table 2: Areas Served**

Garment Decorators: Areas Served	2018	2017
Local	71.4%	68.3%
Regional	58.0%	58.5%
National	47.1%	65.9%
International	19.3%	22.0%

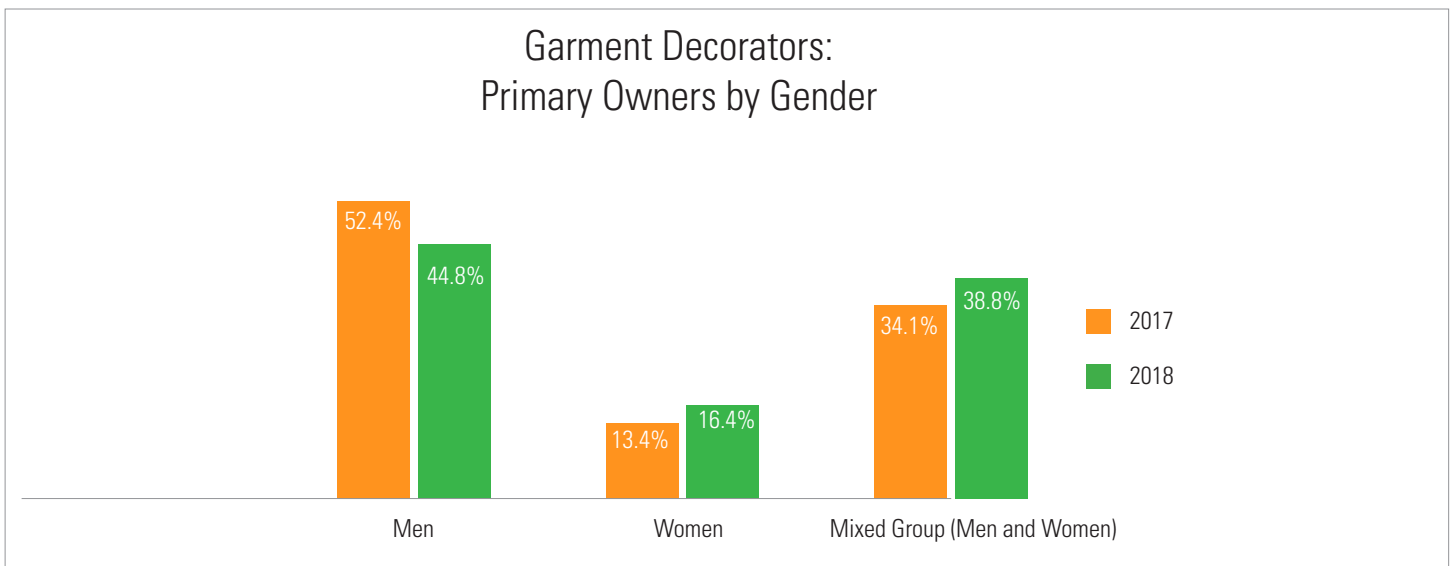
**Table 3: Number of Employees**

Garment Decorators: Number of Employees	2018	2017
1-4	41.8%	35.4%
5-9	19.4%	17.1%
10-19	14.9%	24.4%
20-99	20.9%	19.5%
100-499	3.0%	3.7%

**Graph 1: Total Annual Sales**



**Graph 2: Primary Owners by Gender**



**Table 4: Departments by Gender Representation**

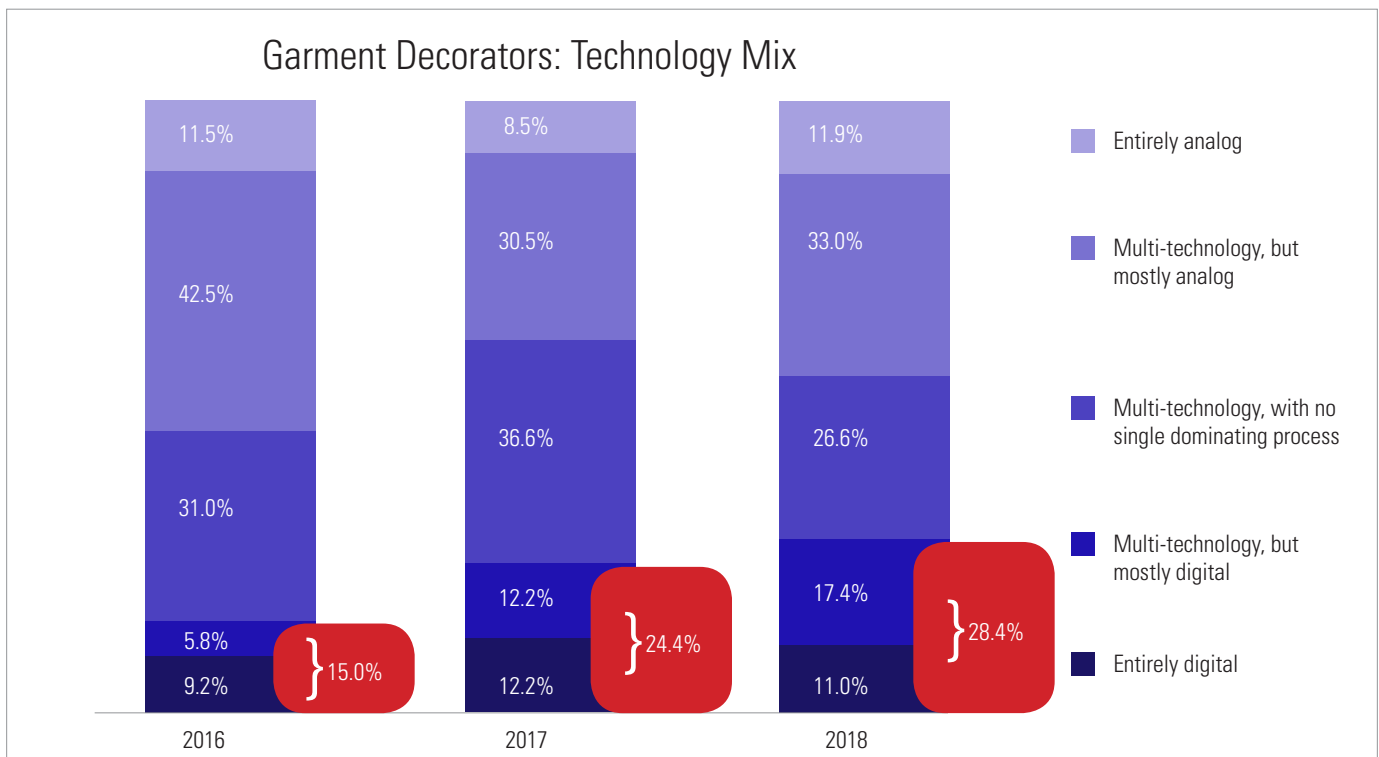
Garment Decorators: Departments by Gender Representation	Men		Women	
	2017	2018	2017	2018
Management	62.0%	55.8%	38.0%	44.2%
Sales	58.1%	47.7%	41.9%	52.3%
Administrative Support	27.9%	27.8%	72.1%	72.2%
Production	59.8%	53.7%	40.2%	46.3%

### Technology Use

Companies use different types of technologies but tend to rely more and more on digital technology. The proportion of those using digital either solely or as part of a multi-technological approach has almost doubled since 2016 (Graph 3). The top print processes used by garment decorators continue to be screen printing (71.8%), embroidery (64.7%) and dye sublimation (37.6%) (Table 5).

The proportion of those who provide post-production/finishing services to their customers to those who do not continues to be 2:1 (62.4% vs. 37.6%) (Table 6). Bagging/tagging, fulfillment, sewing, grommeting and warehousing have been offered the most by garment decorators this year (Table 7). When printers exchange their services with each other, production services are twice as frequent as post-production/finishing services (Table 8). More than three-quarters of the companies (78.0%) use at least half of their production capacity — an 18.5% increase from 2017 (Table 9).

**Graph 3: Technology Mix**



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**Table 5: Types of Technology Used in Production**

Garment Decorators: Types of Technology Used in Production	Percentage of Companies Using Technology	
	2018	2017
Screen Printing	71.8%	74.4%
Embroidery	64.7%	61.0%
Dye Sublimation	37.6%	41.5%
Inkjet: Direct-to-Garment	28.2%	31.7%
Inkjet: Wide-Format	20.0%	14.6%
Laser Etch/Engrave	16.5%	12.2%
Pad Printing	7.1%	9.8%
Dry Toner	17.6%	7.3%
Inkjet: Custom Solutions	16.5%	7.3%
Inkjet: Narrow-Format	11.8%	7.3%
Screen: Rotary	1.2%	6.1%
Screen: Cylinder	1.2%	6.1%
Inkjet: Commercial	8.2%	6.1%
Offset: Sheetfed	2.4%	2.4%
Dynamic Signage	0.0%	1.2%

**Table 6: Finishing/Post-Production Services to Customers**

Garment Decorators: Finishing/Post-Production Services Offered to Customers	2018	2017
Yes	62.4%	60.5%
No	37.6%	39.5%

**Table 7: Types of Finishing/Post-Production Services Offered**

Garment Decorators: Types of Finishing/Post-Production Services Offered	2018	2017
Bagging/tagging	65.2%	65.9%
Fulfillment	42.0%	45.1%
Sewing	37.7%	22.0%
Warehousing	33.3%	26.8%
Grommeting	31.9%	19.5%
Sewing or seaming	20.3%	23.2%
Lamination	17.4%	7.3%
Installation	14.5%	7.3%
Mounting	10.1%	7.3%
Die-cutting/laser cutting	8.7%	8.5%
Routing	2.9%	3.7%
Doming	1.4%	0.0%

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**Table 8: Production and Finishing/Post-Production Services Exchange**

Garment Decorators: Production/Finishing/Post-Production Services to Other Printers	
Provide PRODUCTION services TO other printers	60.2%
Provide FINISHING/POST-PRINT services TO other printers	28.6%
Purchase PRODUCTION services FROM other printers	43.9%
Purchase FINISHING/POST-PRINT services FROM other printers	23.5%

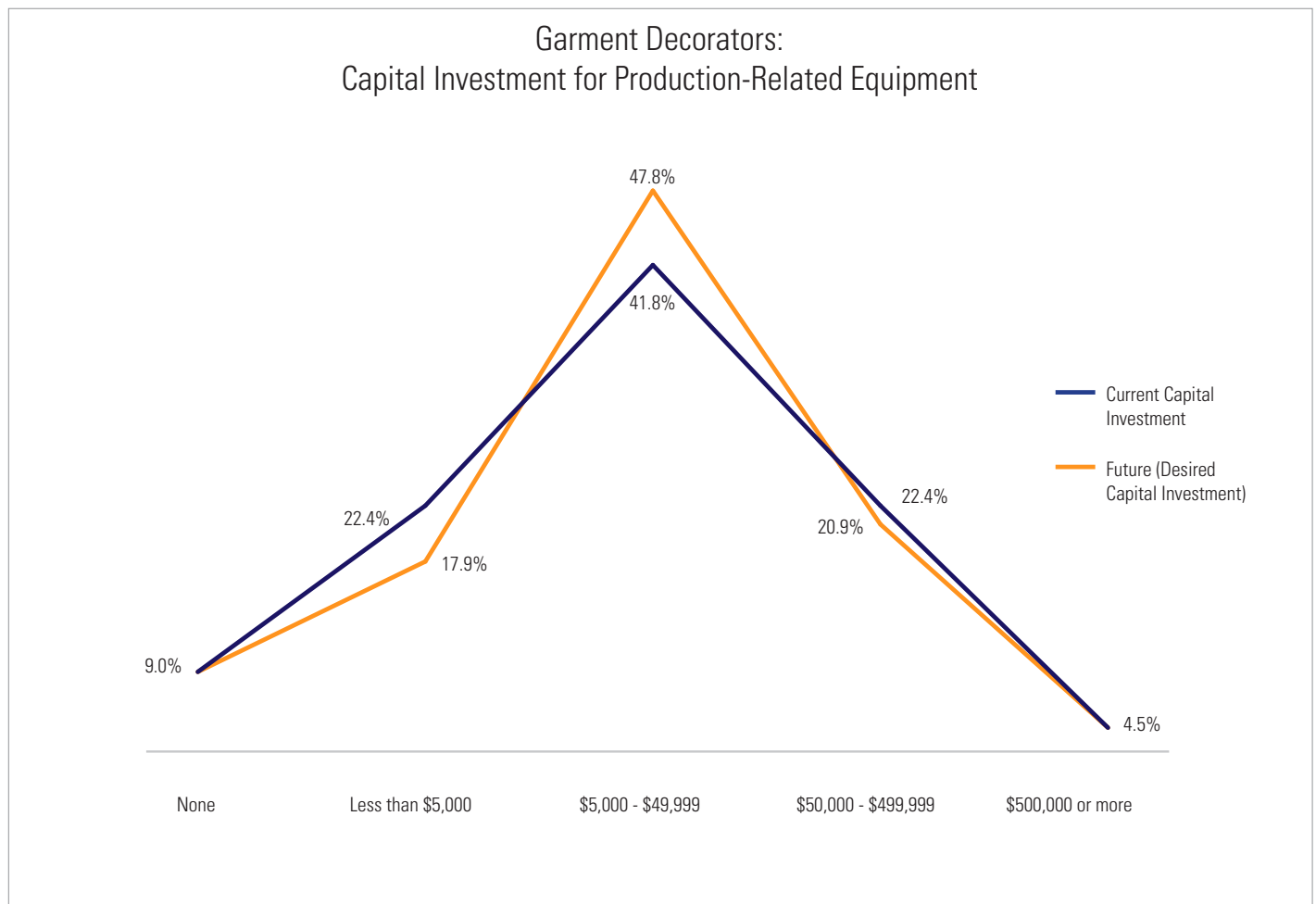
**Table 9: AVERAGE Production in Use as Compared to TOTAL Potential Production**

Garment Decorators: AVERAGE production in use as compared to TOTAL potential production	2018	2017
0%-10%	3.7%	6.1%
11%-20%	3.7%	1.2%
21%-30%	3.7%	9.8%
31%-40%	6.4%	4.9%
41%-50%	4.6%	12.2%
51%-60%	17.4%	6.1%
61%-70%	19.3%	19.5%
71%-80%	23.9%	25.6%
81%-90%	10.1%	7.3%
91%-100%	7.3%	7.3%

### Equipment Use and Purchases

The level of capital spending stayed strong this year. More than two-thirds of respondents (68.7%) spent at least \$5,000 on equipment, and expected spending is on the rise for the “\$5,000-\$49,999” segment (Graph 4). About four out of five respondents (78.5%) indicated they intend to spend either the same amount or more on equipment (Table 10). When making purchases, cash is used by more than half of the respondents (58.2%), which is 16.4% higher than in 2017. Other methods used frequently by garment decorators are company credit cards (29.9%) and bank loans (22.4%), while more than a quarter of respondents decided to lease the equipment (26.9%) (Table 11). Durability of equipment, customer support and brand name/reputation are the most important factors influencing equipment purchases for at least half of the respondents (Table 12). Pre-press tools, screen printing presses, direct-to-garment inkjets and dryers are used the most (Tables 13-17).

**Graph 4: Capital Investment for Production-Related Equipment**



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**Table 10: Current vs. Future Capital Investment**

Garment Decorators: Current vs. Future Capital Investment (What are the expectations?)	
Same or Increase	78.5%
Decrease	21.5%

**Table 11: Payment Methods Used for Production-Related Equipment Purchases**

Garment Decorators: Payment Methods Used for Production-Related Equipment Purchases	2018	2017
Cash	58.2%	50.0%
Company credit card	29.9%	35.4%
Bank loan	22.4%	25.6%
Lease	26.9%	18.3%
Personal credit card	10.4%	9.8%
Personal loan	14.9%	6.1%
Supplier financing	7.5%	4.9%

**Table 12: Factors Influencing Equipment Purchases**

Garment Decorators: Factors Influencing Equipment Purchases	2018	2017
Durability of equipment	64.9%	59.8%
Customer support	66.0%	53.7%
Brand name/reputation	52.6%	41.5%
Purchase price of equipment	39.2%	39.0%
Price to operate/maintain	22.7%	31.7%
Range of capabilities	26.8%	28.0%
Warranty	9.3%	11.0%
Upgrade capabilities	3.1%	4.9%
Financing	9.3%	3.7%
User references	1.0%	3.7%
Service plan	4.1%	1.2%

**Table 13: Pre-Press**

Garment Decorators: Pre-press	Currently in Use	Bought during the LAST 12 months	Planning to buy during the next 12 months
Image Carrier tools (plate/screen/cliche-making equipment/tools, etc.)	31.9%	6.7%	3.4%
Production tools (color measurement, proofing device, viewing station, etc.)	27.7%	4.2%	4.2%
Software (RIP, creative, color management, production management, etc.)	48.7%	10.1%	3.4%



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**Table 14: Screen Printing**

Garment Decorators: Screen Printing	Currently in Use	Bought during the LAST 12 months	Planning to buy during the next 12 months
Manual screen printing press, garments	38.7%	1.7%	1.7%
Automatic screen printing press, garments	33.6%	6.7%	7.6%
Automatic screen printing press, graphics/industrial	5.0%	0.8%	0.8%
Manual screen printing press, graphics/industrial	5.0%	0.8%	0.0%

**Table 15: Inkjet: Wide-Format**

Garment Decorators: Inkjet: Wide-Format	Currently in Use	Bought during the LAST 12 months	Planning to buy during the next 12 months
Roll-to-roll, SOLVENT, 36-96 inches	5.0%	1.7%	0.8%
Roll-to-roll, AQUEOUS, 36-96 inches	3.4%	0.0%	0.0%
Roll-to-roll, DYE SUBLIMATION, 36-96 inches	3.4%	1.7%	1.7%
Roll-to-roll, LATEX, 36-96 inches	2.5%	0.0%	2.5%
Roll-to-roll, UV-CURABLE, 36-96 inches	0.0%	0.0%	0.8%
Hybrid, UV-CURABLE, less than 36-96 inches	0.0%	0.8%	0.0%
Flatbed, compact or tabletop system	0.0%	0.8%	0.8%

**Table 16: Press: Other**

Garment Decorators: Press, Other	Currently in Use	Bought during the LAST 12 months	Planning to buy during the next 12 months
Inkjet: Direct-to-Garment	15.1%	2.5%	15.1%

**Table 17: Post-Press, Screen Printing**

Garment Decorators: Post-Press, Screen Printing	Currently in Use	Bought during the LAST 12 months	Planning to buy during the next 12 months
Automatic screen cleaning/reclamation	7.6%	3.4%	8.4%
Dryer, curing unit	35.3%	4.2%	3.4%

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### Markets and Products

The athletic, educational institutions, business-to-consumer, nonprofit and corporate branding markets are served by the majority of garment decorators and are considered to have the highest growth potential (Table 18). T-shirts, performance wear, hats/caps and bags are the most popular end products for the majority of respondents. The first three were identified as growing areas as well. The popularity of patches and appliqués is also on the rise (Table 19).

**Table 18: Market Areas Served**

Garment Decorators: Market Areas Served	2018	2017	Growing	Staying the Same	Declining
Athletic (teams, college, professional, recreational)	72.3%	70.7%	59.0%	36.1%	4.8%
Educational institutions (schools, colleges, tutoring)	67.2%	57.3%	44.9%	48.7%	6.4%
Business-to-consumer	64.7%	61.0%	52.1%	43.8%	4.1%
Non-profits, associations, organizations (clubs, charities, churches, trade associations)	63.9%	52.4%	43.2%	51.4%	5.4%
Corporate branding	63.0%	57.3%	63.0%	37.0%	0.0%
Food services (restaurants, bars, cafes, cafeterias)	55.5%	45.1%	35.9%	57.8%	6.3%
Retail	53.8%	57.3%	50.8%	44.3%	4.9%
Arts/entertainment	43.7%	39.0%	50.0%	46.0%	4.0%
Health care (hospitals, clinics, nursing homes, pharmacies)	38.7%	32.9%	53.3%	42.2%	4.4%
Architecture/construction	34.5%	26.8%	39.5%	57.9%	2.6%
Printing for the trade	33.6%	29.3%	42.1%	50.0%	7.9%
Ad agencies	31.9%	28.0%	22.9%	68.6%	8.6%
Government & government contractors (law enforcement, military, other contracts)	26.1%	22.0%	23.3%	70.0%	6.7%
Hospitality services	22.7%	24.4%	20.0%	68.0%	12.0%
Financial/accounting/legal/insurance	16.8%	4.9%	15.0%	80.0%	5.0%
Utilities	16.0%	18.3%	15.8%	84.2%	0.0%
Exhibit manufacturers/contractors	16.0%	4.9%	31.6%	63.2%	5.3%
Transit/transportation	11.8%	18.3%	21.4%	78.6%	0.0%
Manufacturing OEM (original equipment manufacturer)	10.1%	9.8%	27.3%	54.5%	18.2%
Communications	8.4%	12.2%	20.0%	80.0%	0.0%
Interior decorators and designers	8.4%	2.4%	33.3%	66.7%	0.0%

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**Table 19: Products Areas Served**

Garment Decorators: Product Areas Served	2018	2017	Growing	Staying the Same	Declining
T-Shirts	98.3%	98.8%	61.9%	34.5%	3.5%
Performance Wear	86.6%	73.2%	78.0%	21.0%	1.0%
Hats/Caps	78.2%	69.5%	51.6%	47.3%	1.1%
Bags	73.1%	68.3%	21.4%	69.0%	9.5%
Blankets/Towels	51.3%	51.2%	11.9%	72.9%	15.3%
Patches/Appliques	48.7%	32.9%	50.0%	39.3%	10.7%
Swimwear	10.1%	12.2%	25.0%	50.0%	25.0%

## Credit Terms

Almost all of the respondents accept checks (95.6%), credit cards (92.6%) and cash (89.7%) as payment types, and more than half work with debit cards (69.1%) and bank wire transfers (54.4%). Phone and mobile payments have increased in popularity and are now used by almost half of the respondents (41.2%) (Table 20).

The maximum length for credit terms among printers is 30 days, but about half of them require payment prior to or at the time of delivery (Table 21). Of the respondents, 85% indicated having outstanding account receivables balance of 10% or less (Table 22). The median percentage of outstanding payments continues to be 5%.

**Table 20: Accepted Types of Payment**

Garment Decorators: Accepted Types of Payment	2018	2017
Checks	95.6%	86.6%
Credit Cards	92.6%	84.1%
Cash	89.7%	79.3%
Debit Cards	69.1%	59.8%
Bank Wire Transfer	54.4%	57.3%
Phone and Mobile Payments	41.2%	29.3%
Money Orders	38.2%	31.7%

**Table 21: Standard Credit Terms**

Garment Decorators: Standard Credit Terms	2018	2017
Payment due prior to or at the time of delivery	48.5%	43.9%
30 days	51.5%	48.8%
60 days	0.0%	3.7%
90 days	0.0%	2.4%
Other	0.0%	1.2%

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**Table 22: Percent of 2017 Accounts Receivable (as of January 1, 2018)**

Garment Decorators: Percent of 2017 Accounts Receivable (as of January 1, 2018)	2018	2017
0%	20.9%	26.8%
1-10%	64.2%	54.9%
11-20%	9.0%	12.2%
21-30%	3.0%	2.4%
31-40%	0.0%	2.4%
51-60%	1.5%	1.2%
61-70%	1.5%	0.0%

## Business Strategy

Finding new customers (40.9%), downward pressure on prices (37.6%) and recruiting/retaining production personnel (35.5%) were identified as the main barriers to growth, followed by the cost of new technology adoption (26.9%), finding new channels of distribution (23.7%) and overall rising costs (23.7%) (Table 23). Globalization and environmental issues continue to be of the least concern.

When it comes to staying competitive in production, companies tend to focus on reducing costs (63.6%), becoming a one-stop shop (52.3%) and adding new product lines (51.1%) (Table 24). Referrals (79.2%), company websites (76.4%), social media (69.4%) and inside sales (66.7%) are used by at least two-thirds of the companies to attract new customers. The majority of respondents use Facebook, Instagram and Twitter. For the future, the focus is on trade shows and networking events (Table 25). To stay competitive, companies tend to increase their internet presence (62.3%), maximize the value of current customers (55.1%), improve customer service (49.3%) and look to expand geographically in the future (Table 26).

**Table 23: Barriers to Growth**

Garment Decorators: Barriers to Growth	
Finding new customers	40.9%
Downward pressure on prices	37.6%
Recruiting/retaining production personnel	35.5%
Cost of new technology adoption	26.9%
Finding new channels of distribution	23.7%
Rising costs	23.7%
Recruiting/retaining sales personnel	21.5%
Training employees	18.3%
Ability to secure credit/lines of credit	15.1%
Understanding new technology	11.8%
Obtaining financing for investment	10.8%
Recruiting/retaining management personnel	10.8%
Globalization (off-shoring, out-sourcing)	9.7%
Environmental issues/regulations	3.2%

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**Table 24: Strategies in Production: Current vs. Future**

Garment Decorators			
CURRENT Strategies in Production		FUTURE Strategies in Production	
Reduce operating costs	63.6%	Add new product lines	27.3%
Becoming a one-stop shop	52.3%	Lean manufacturing/continuous improvement	23.9%
Add new product lines	51.1%	Add imaging capacity	22.7%
Train staff	44.3%	Reduce operating costs	20.5%
Lean manufacturing/continuous improvement	43.2%	Employee appreciation/incentives	18.2%
Add fulfillment capacity	27.3%	Add fulfillment capacity	15.9%
Workforce reorganization	20.5%	Add finishing capacity	13.6%
Add imaging capacity	19.3%	Train staff	13.6%
Add finishing capacity	17.0%	Workforce reorganization	13.6%
Employee appreciation/incentives	17.0%	Becoming a one-stop shop	10.2%

**Table 25: Methods for Attracting New Customers: Current vs. Future**

Garment Decorators			
CURRENT Methods for Attracting New Customers		FUTURE Methods for Attracting New Customers	
Referrals	79.2%	Trade shows	23.6%
Company website	76.4%	Networking events	22.2%
Social media	69.4%	Electronic communications	20.8%
Inside sales	66.7%	Outside sales	19.4%
Outside sales	44.4%	Social media	16.7%
Electronic communications	43.1%	Purchased sales leads	16.7%
Networking events	40.3%	Boards and civic organizations	15.3%
Trade shows	31.9%	Company website	13.9%
Direct mail	23.6%	Online directory listings	13.9%
Boards and civic organizations	22.2%	Pay-for-click advertising	13.9%
Online directory listings	19.4%	Purchased banner ads	13.9%
On-site advertising	19.4%	Direct mail	12.5%
Pay-for-click advertising	19.4%	Inside sales	12.5%
Purchased banner ads	6.9%	Referrals	9.7%
Classified ads	5.6%	On-site advertising	9.7%
Purchased sales leads	4.2%	Classified ads	4.2%

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**Table 26: Management & Sales Strategies: Current vs. Future**

Garment Decorators			
CURRENT Management & Sales Strategies		FUTURE Management & Sales Strategies	
Increase internet presence	62.3%	Expand geographically	29.0%
Maximize value of current customers	55.1%	Hire additional sales staff	20.3%
Improve customer service	49.3%	Increase marketing budget	20.3%
Hire additional sales staff	47.8%	Marketing of sustainability efforts	20.3%
Develop new vertical markets	46.4%	Maximize value of current customers	18.8%
Increase marketing budget	30.4%	Acquire another company	17.4%
Expand geographically	26.1%	Develop new vertical markets	15.9%
Create subsidiary	10.1%	Create subsidiary	14.5%
Marketing of sustainability efforts	10.1%	Improve customer service	11.6%
Acquire another company	8.7%	Increase Internet presence	11.6%
Reduce prices	5.8%	Reduce prices	10.1%
Merge with another company	2.9%	Merge with another company	7.2%

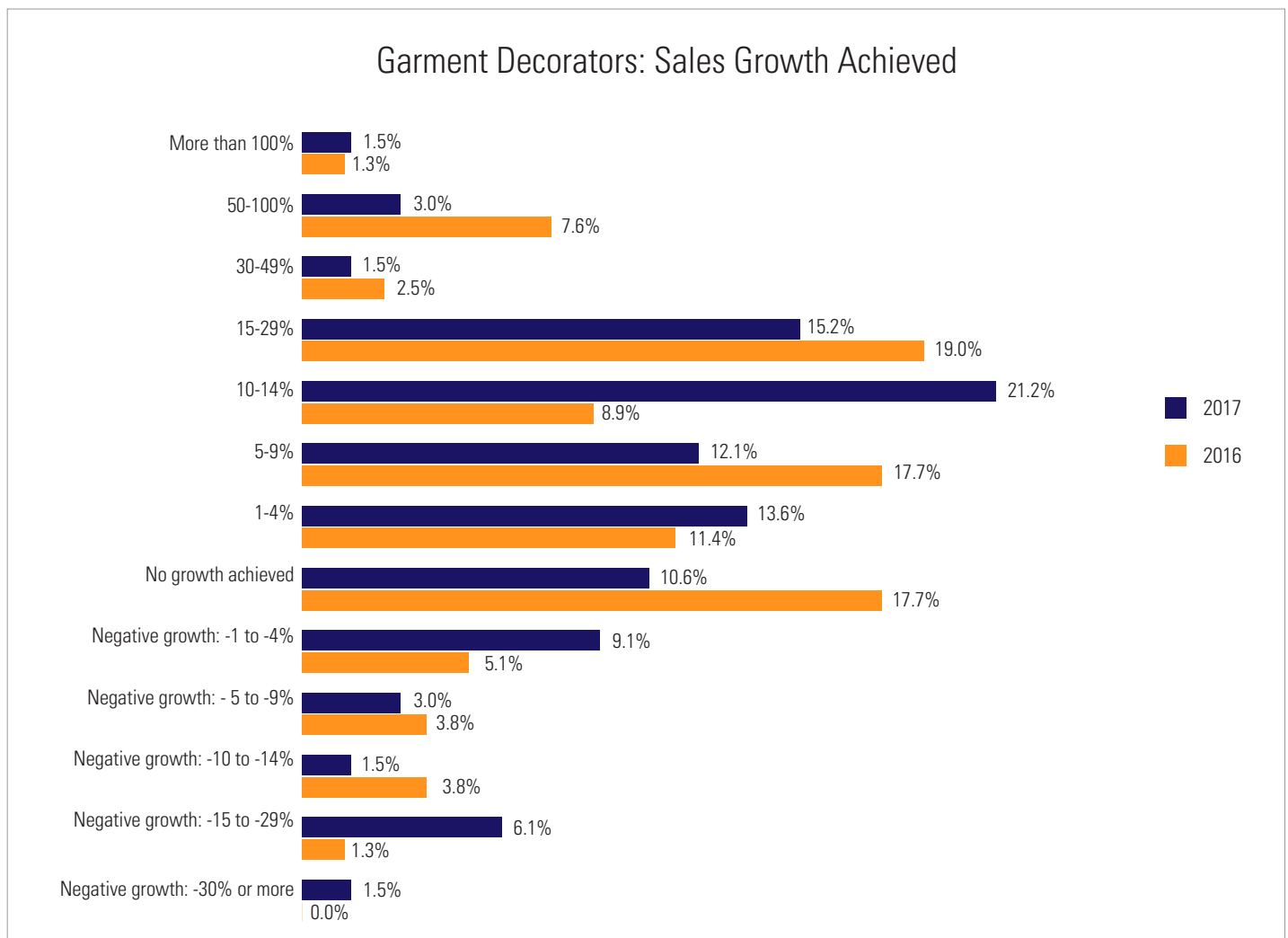
### Business Outlook

The median sales growth continues to be around 7%. Two-thirds of the companies (68.1%) reported positive sales growth, which is close to last year's 68.4% (Graph 5). About two-thirds of the companies reported increased production (63.6%). Approximately nine out of 10 companies expect an increase in sales and production in the future, while about half expect the same for employment and prices for products sold (Table 28). In line with growth expectations, the survey asked what positions companies will need to fill. The highest needs are expected for sales representative and customer service representative positions (Table 29).

Survey respondents are overall optimistic about the future, as 69.7% feel positive about the industry (Graph 6) and more than half (51.5%) are confident about the economy (Graph 7).

This was another strong year for the industry. To overcome current barriers to growth, we encourage companies to explore new markets and extend product offerings while maintaining a focus on current customers.

**Graph 5: Sales Growth Achieved**



# 2018 SGIA Industry Benchmarking Report

## Garment Decoration Community



**Table 28: Business Conditions**

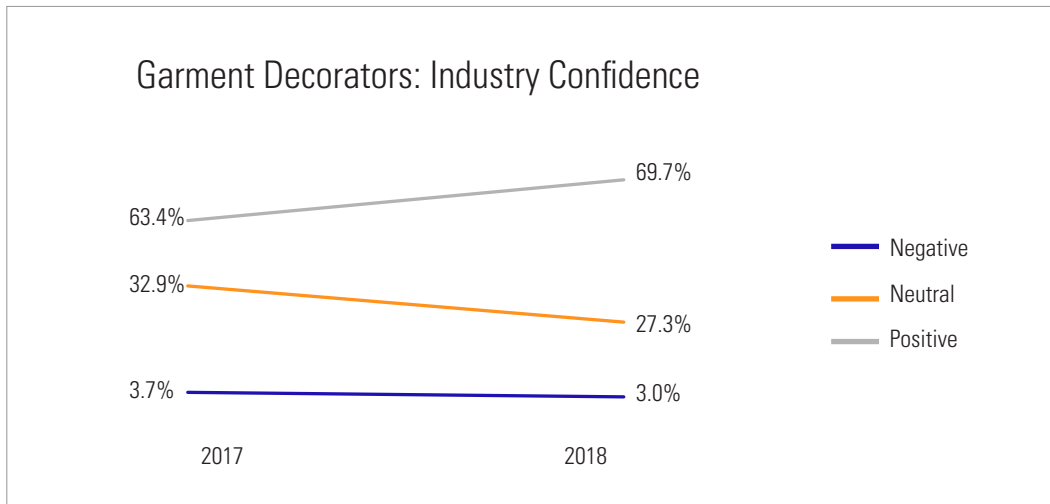
Garment Decorators: Business Conditions	Current			Future		
	Decrease	Stay the same	Increase	Decrease	Stay the same	Increase
Sales	19.7%	25.8%	54.5%	1.5%	9.1%	89.4%
Production/amount of work	9.1%	27.3%	63.6%	0.0%	10.6%	89.4%
Employment	9.1%	53.0%	37.9%	6.1%	47.0%	47.0%
Prices for products sold	6.1%	65.2%	28.8%	4.5%	48.5%	47.0%

**Table 29: Expected Hiring Needs**

Garment Decorators: Will be hiring for...	
Sales Representative	58.1%
Customer Service Representative	48.4%
Graphic Designer	32.3%
Manual Textile Press Operator	22.6%
Digital Press Operator	19.4%
Analog Press Operator	16.1%
Analog Pre-Press/Make-Ready	12.9%
Customer Service Manager	12.9%
Expediter/Scheduler	12.9%
General Manager	9.7%
Marketing Manager	9.7%
Sales Manager	9.7%
Analog Post-Press/Tear-Down	6.5%
Art Director	6.5%
Ink Technician/Color Mixer, Matcher	6.5%
Production Manager/Plant Foreman	6.5%
Quality Control Manager	6.5%



**Graph 6: Industry Confidence**



**Graph 7: National Economy Confidence**

