

FAMA/FEMSA Member Outlook Report for 2013

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Table of Contents

Author's Notes	i
Summary of Findings	ii
Introduction	
1. Lines of Business	1
2. Geographic Areas Served	1
3. Number of Manufacturing Locations	2
1. Trends Affecting Industry	3
2. Anticipated Business Change	4
3. Anticipated Product Lead Times Over Next Three Years	4
4. Expected Change to Capital Investment Over Next Three Years	5
5. Current and Projected Factory Capacity	5
6. Percent of Sales That are Exports	6
7. Anticipated Export Growth	6
8. Currently Sell to Military	7
9. Emergency Market Business	7
1. Current Employment	8
2. Anticipated Employment	8
1. Concern about Various Issues	9
2. Negatively Impacted by Economy	9
3. Strategies Being Used During Economic Times	10
4. Most Successful Strategy	10
5. Effectiveness of Communication Strategies	10
6. Anticipated Industry Consolidation	11
7. Gain from Membership in FAMA/FEMSA	11

Author's Notes

Throughout the report, the term “average” refers to the statistical mean of the data.

The letter “n” is used to designate the number of the respondents to a particular question. When figuring the percent breakdown for each question, non-respondents were not included in the total in order to achieve “valid percentage” data. This technique is commonly considered to yield the most statistically accurate information.

Tests to analyze the correlation between various respondent characteristics were run for all applicable variables. When a statistical test indicated a dependent relationship at a minimum 95% level of confidence, the correlation between the factors is noted as “significant” in the report.

Summary of Findings

Overall Purpose

The purpose of the research was to gather information regarding trends of member organizations. Additional goals include:

- Determining the effect of the current economic status on fire departments
- Gathering information regarding current apparatus used and potential needs

Dates conducted: January 2014–February 2014.

A total of 70 member companies participated in the survey. The online survey consisted of 24 questions.

Summary of Findings

Members are positive about their industry and anticipate growth in the industry: increased factory utilizations, increased capital investments, export growth, and an increase in employment levels.

- Over the next three years, members anticipate an increase in their business—93% anticipate their business to grow over the next three years.
- Eighty-one percent of respondents believe their capital investments will increase over the next three years.
- Fifty-nine percent of respondents expect exports to grow over the next three years.
- Eighty-five percent of members are projecting full-time employment growth over the next three years.

Introduction

Overall Purpose

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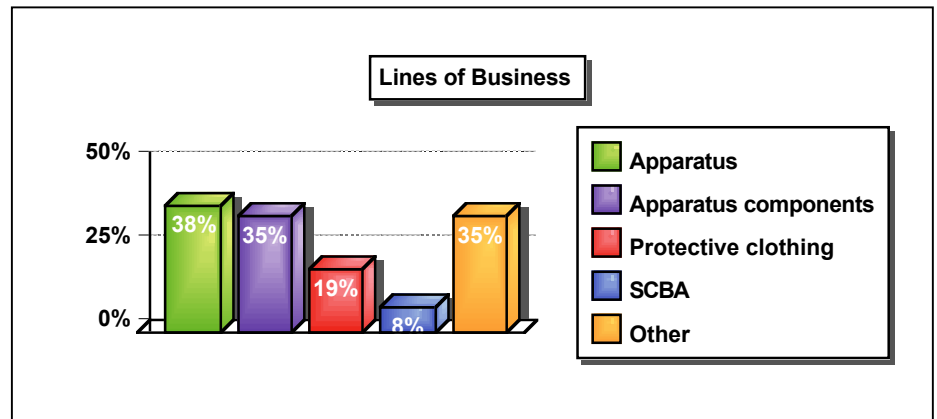
The survey was blasted out to members of both the Fire Apparatus Manufacturers' Association (FAMA) and the Fire and Emergency Manufacturers and Services Association (FEMSA). The survey was written by Jeff Hupke.

Respondent Characteristics

1. Lines of Business

(What line(s) of business are you in?)

Thirty-eight percent of respondents sell apparatus components and 35% sell/manufacture apparatus. Thirty-five percent of respondents indicated "other" as their type of business.



2. Geographic Areas Served

(Please estimate the percentage of your primary business sales in each of the following areas so that the total is 100%.)

Members serve the various areas of the country fairly evenly. (Note: n=57.)

Note: Some respondents provided percentages that total more than 100%.

Midwest US	32%
Northeast US	23%
Southeast US	19%
Western US	21%
Canada	10%
Other	13%

Introduction

3. Number of Manufacturing Locations

(How many manufacturing locations do you have in each of the following places?)

The respondents in total have 83 manufacturing locations in the US and 14 in Europe.

	Total locations	1 location	2-5 locations	More than 5 locations
US	83	35	14	2
Europe	14	4	4	0
Asia	12	10	1	0
Canada	4	4	0	0
South America	0	0	0	0
Central America	2	0	0	0
Other	0	0	0	0

Business Trends

1. Trends Affecting Industry

(What are the biggest trends currently affecting your industry?)

For 41% of the respondents, the “economy/budget cuts/lack of funding/grants” are most affecting them; 11% indicated “international/exchange rates.” See Appendix B for complete list of verbatim comments.

- “Fire departments are hiring more recruits and purchasing more PPE as a result.”
- “Municipal spending priorities.”
- “Personal Protective Equipment from Asia is costing the US manufacturing jobs.”
- “Company consolidations and acquisitions, leading to reevaluation of equipment and subsequent less demand for new equipment. More emphasis placed on refurbishing of existing equipment.”
- “The health and wellness of our distribution channel partners.”
- “Lack of funds.”
- “Slow growth in the fire industry, looking for market outside of fire/emergency and international. More cost conscious.”
- “Excessive regulations.”
- “High expectations with small budgets.”
- “Healthcare.”
- “Economy.”
- “Fleets keeping equipment longer and figuring out how to get by with less. Fire departments buying fewer apparatus and smaller apparatus.”

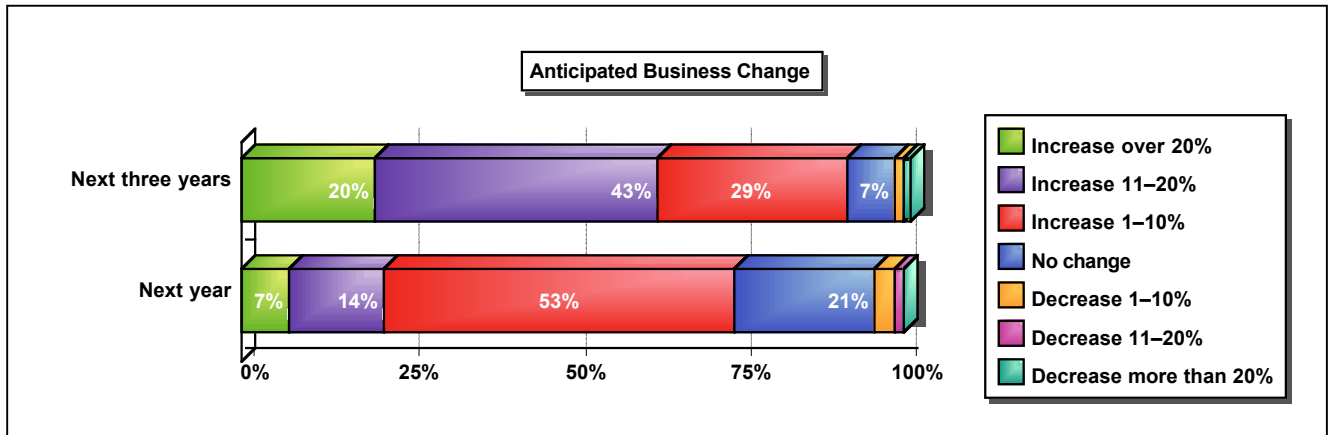
Economy/budget cuts/lack of funding/grants	41%
International/exchange rates	11%
Competition/more manufacturers	8%
Cost/reduced spending/finances	8%
Do more with less/refurbish/smaller	8%
Consolidation/group purchasing/co-op	8%
Healthcare costs/Obamacare	6%
Gov regulations	5%
Staffing issues/less staffing	3%
Recruitment & retention/lack of quality employees	3%

Business Trends

2. Anticipated Business Change

(How do you expect your business to change over next year/next three years?)

Seventy-four percent of respondents expect their business to increase next year and almost all (93%) expect their business to increase during the next three years. Twenty percent of respondents anticipate their business growing over 20% during the next three years and 43% believe it will grow 11-20%. (Note: n=70.)



Results from the 2013 study are more positive than the 2012 study.

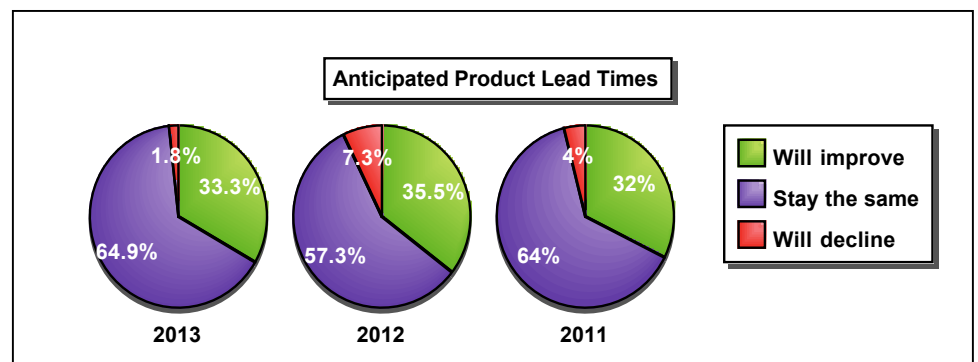
	Current			Three years		
	2013 (n=70)	2012 (n=136)	2011 (n=92)	2013 (n=70)	2012 (n=136)	2011 (n=92)
Increase over 20%	7%	6%	9%	20%	18%	17%
Increase 11-20%	14%	11%	13%	43%	31%	37%
Increase 1-10%	53%	47%	42%	29%	41%	39%
No change	21%	29%	24%	7%	6%	4%
Decrease 1-10%	3%	5%	12%	0%	3%	2%
Decrease 11-20%	1%	2%	0%	1%	<1%	0%
Decrease more than 20%	0%	0%	0%	0%	0%	0%

3. Anticipated Product Lead Times Over Next Three Years

(What do you expect in terms of product lead times over the next three years?)

One-third of respondents anticipate product lead times will improve over the next three years and 65% believe they will stay the same. Only two percent of respondents anticipate they will decline. (Note: n=57.)

Results from the 2013 study show improvements in lead times over the 2012 study.

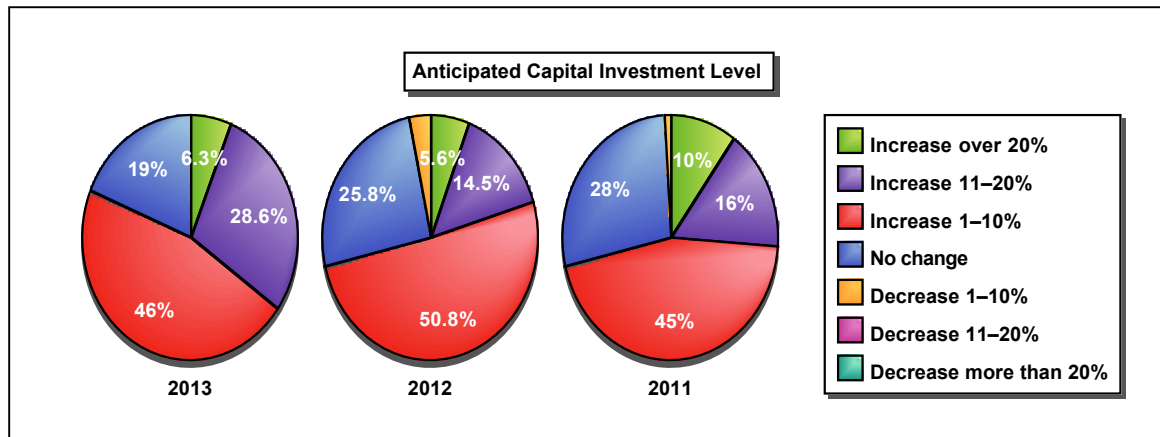


Business Trends

4. Expected Change to Capital Investment Over Next Three Years

(What change is expected in the level of capital investment over the next three years?)

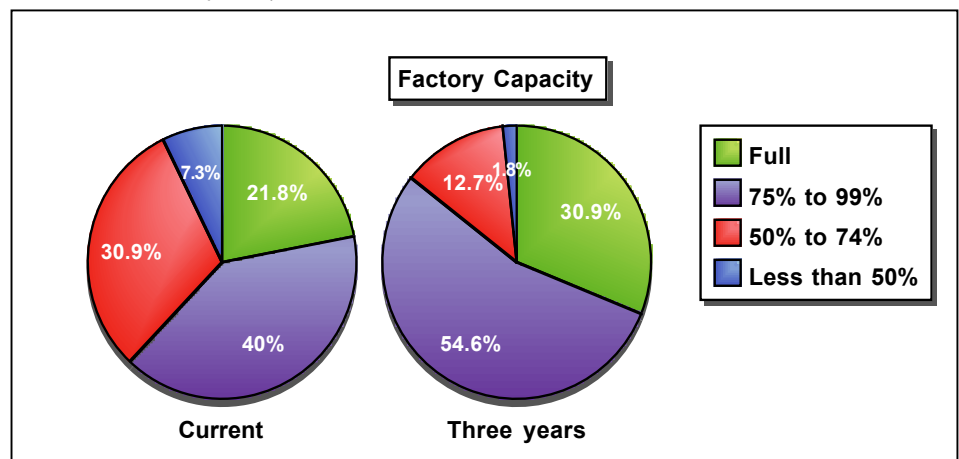
Over the next three years, 81% of respondents believe their capital investments will increase—6% of respondents believe their investment will increase over 20%. Capital investment continues to increase. (Note: n=63.)



5. Current and Projected Factory Capacity

(What is your current factory capacity/what will it be in three years?)

Twenty-two percent of respondents' factories are currently full and 40% are running at 75% to 99% of capacity. Within three years, 31% are anticipated to be at full capacity and 55% will be at 75% to 99% of capacity. (Note: n=55.)



In comparing the three-year projections from this year's study to last year's study, a higher percentage of companies are running at full capacity.

	Current			Three Years		
	2013 (n=55)	2012 (n=124)	2011 (n=75)	2013 (n=55)	2012 (n=124)	2011 (n=75)
Full	22%	11%	9%	31%	22%	24%
75% to 99%	40%	38%	54%	55%	66%	67%
50% to 74%	31%	44%	32%	13%	12%	9%
Less than 50%	7%	7%	5%	2%	0%	0%

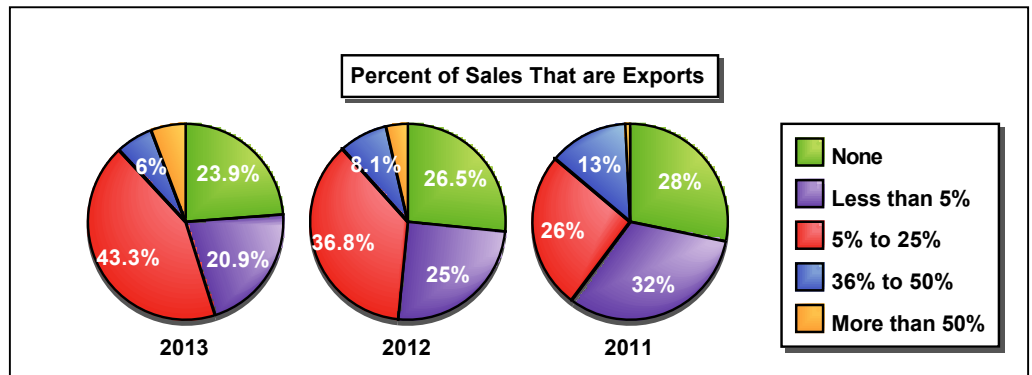
Business Trends

6. Percent of Sales That are Exports

(What percent of your sales do exports represent?)

Seventy-three percent of respondents indicated at least some of their sales are from exports—21% indicated exports are less than 5% of their overall sales and 43% export 5% to 25% of their overall sales. (Note: n=67.)

Overall, the percent of sales that are exports grew slightly from 2012 to 2013.

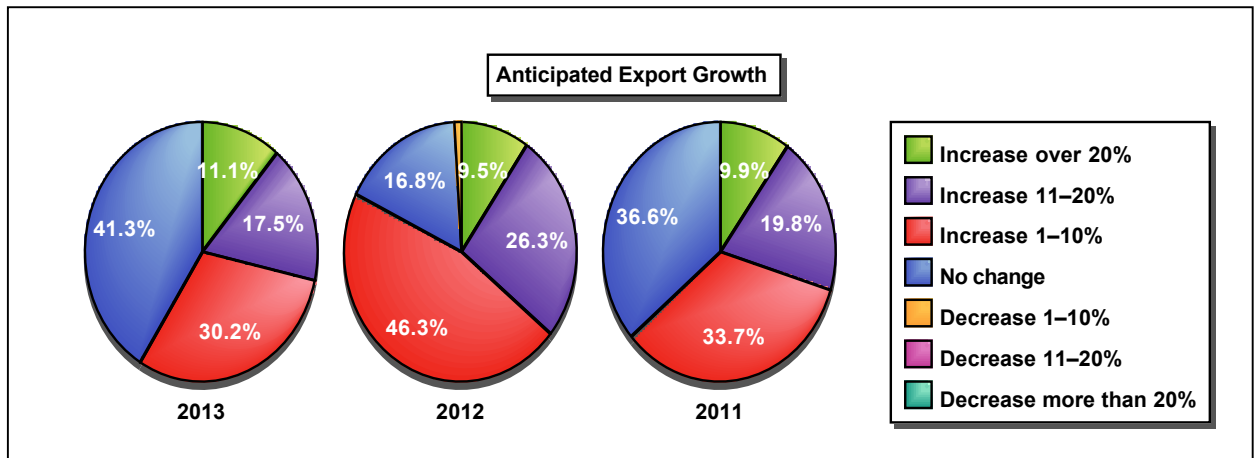


7. Anticipated Export Growth

(Over the next three years, what do you expect to happen with the level of exports from your company?)

Fifty-nine percent of respondents expect exports to increase, while the remaining respondents do not project a change. (Note: n=63.)

Respondents to the 2013 survey are anticipating lower export growth than those respondents from the 2012 survey.



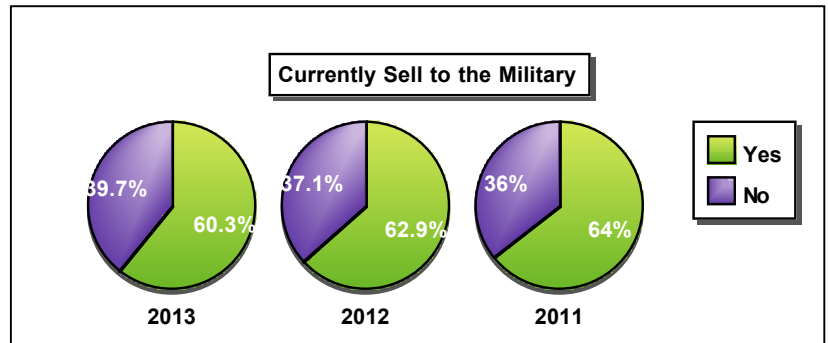
Business Trends

8. Currently Sell to Military

(Do you sell to the military?)

Sixty percent of respondents currently sell to the military. (Note: n=63.)

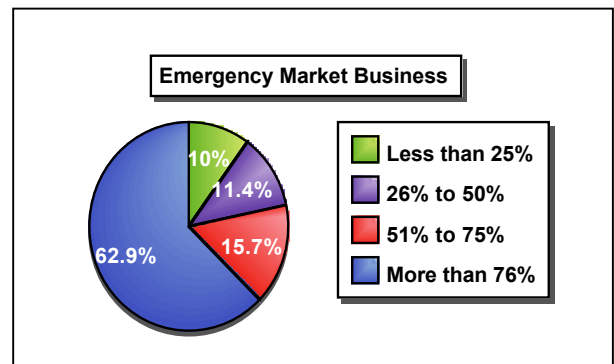
Of those who sell to the military, on average about 9% of their overall sales are to the military, from a low of about 1% to a high of about 50%.



9. Emergency Market Business

(What percentage of your business is related to the emergency market?)

Nearly two-thirds of respondents indicated that more than 76% of their sales are related to the emergency market. (Note: n=70.)

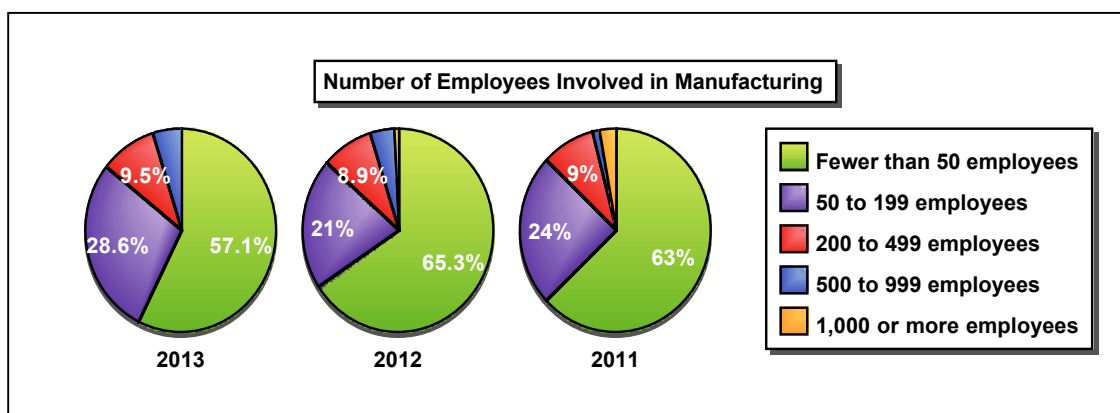


Employment Trends

1. Current Employment

(How many of total employees at your company are involved in fire apparatus or equipment manufacturing?)

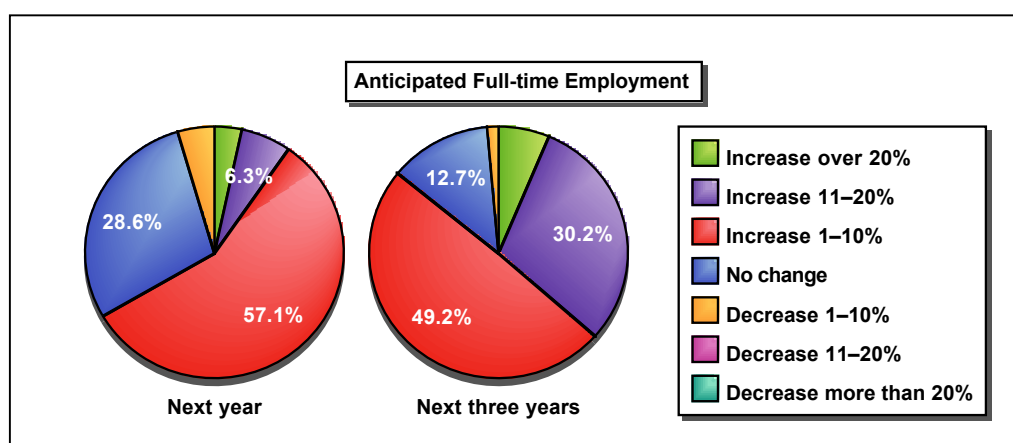
Fifty-seven percent of companies have fewer than 50 employees; 29% have 50 to 199 employees. Total number of employees has increased over the last couple of years. (Note: n=63.)



2. Anticipated Employment

(What is your planned full-time employment for next year/next three years?)

During the next year, the majority of members believe full-time employment will increase (66%) or stay the same (29%). Over the next three years, 85% of members believe full-time employment will increase. (Note: n=63.)



Comparing results from 2013 to 2012, overall anticipated full-time employment has increased during this last year and is projected to increase in the coming three years.

	Next Year		Next Three Years	
	2013 (n=63)	2012 (n=92)	2013 (n=63)	2012 (n=92)
Increase over 20%	3%	0%	6%	2%
Increase 11-20%	6%	5%	30%	15%
Increase 1-10%	57%	44%	49%	56%
No change	29%	48%	13%	21%
Decrease 1-10%	5%	3%	2%	5%
Decrease 11-20%	0%	0%	0%	0%
Decrease more than 20%	0%	0%	0%	0%

Other Trends

1. Concern about Various Issues

(How concerned are you about each of the following issues? Please rate on a scale of 1 to 5, where 1=does not impact my business and 5=keeps me up at night.)

Health care costs and overall economic conditions are what keep members up at night. The housing market and availability of credit are the least worrisome. (Note: n=62.)

	Keeps me up at night (5)	(4)	(3)	(2)	This does not impact my business (1)
Health care costs	31%	39%	19%	7%	3%
Insurance costs	29%	37%	24%	7%	3%
Funding/budgets	29%	31%	36%	3%	2%
Overall economic conditions/general sales declines	21%	39%	40%	0%	0%
Federal regulation	20%	34%	28%	13%	5%
Liability	15%	21%	39%	21%	5%
Industry conditions	11%	37%	40%	10%	2%
Competition	11%	36%	29%	23%	2%
Cost of raw materials	10%	33%	33%	21%	3%
Federal taxes	8%	37%	29%	18%	8%
State/local taxes	8%	31%	29%	27%	5%
Energy costs	3%	27%	44%	16%	10%
Housing market	2%	17%	38%	29%	12%
Availability of credit	2%	10%	31%	34%	23%

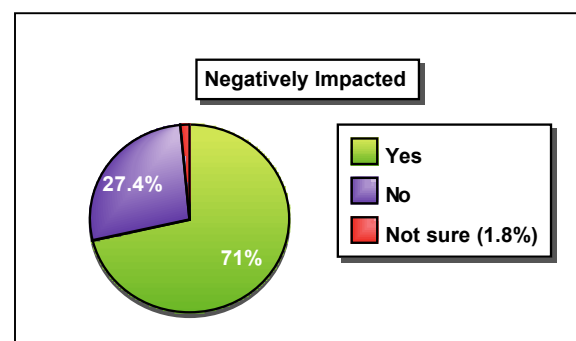
This is similar to last year's results, although overall economic conditions moved down slightly in importance.

	2013 (n=62)	2012 (n=117)
Health care costs	3.9	4.0
Insurance costs	3.8	3.8
Funding/budgets	3.8	3.9
Overall economic conditions/general sales declines	3.8	4.1
Industry conditions	3.6	3.5
Federal regulation	3.5	3.6
Industry conditions	3.5	3.7
Cost of raw materials	3.3	3.2
Competition	3.3	3.2
Federal taxes	3.2	3.6
Liability	3.2	3.1
State/local taxes	3.1	3.3
Energy costs	3.0	3.2
Housing market	2.8	2.6
Availability of credit	2.4	2.5

2. Negatively Impacted by Economy

(Is your business being negatively impacted by the economy?)

Almost three-fourths of the members are being impacted by the economy; 27% are not. (Note: n=62.)



Other Trends

3. Strategies Being Used During Economic Times

(Which of the following strategies are you using to get through these tough economic times?)

Almost two-thirds of members are trying to become more diversified by entering new markets as one of their strategies. Forty percent indicated that they are focusing more on exports. Only 3% are utilizing green technologies. (Note: n=63.)

The results from the 2013 study mirror those of the 2012 and 2011 studies.

	2013 (n=63)	2012 (n=120)	2011 (n=92)
Becoming more diversified by entering new markets	62%	67%	66%
Focusing more on exports	40%	44%	46%
Focusing on higher margins	40%	43%	42%
Becoming more specialized by focusing on niche markets	38%	41%	41%
Becoming more diversified by entering new markets by focusing on several markets	30%	41%	40%
Developing partnerships/outourcing	22%	23%	24%
Becoming a low cost provider	19%	22%	18%
Other	10%	9%	13%
Utilizing green technologies	3%	4%	8%

4. Most Successful Strategy

(Which of the strategies listed do you think is or will be the most successful?)

Twenty-one percent of members are becoming more diversified and then 19% indicated they are becoming more specialized by focusing on niche markets. (Note: n=62.)

	2013 (n=63)	2012 (n=120)
Becoming more diversified by entering new markets	21%	33%
Becoming more specialized by focusing on niche markets	19%	14%
Focusing on higher margins	15%	8%
Becoming more diversified by entering new markets or focusing on several markets	13%	13%
Developing partnerships/outourcing	11%	7%
Focusing more on exports	8%	16%
Becoming a low cost provider	7%	7%
Other	5%	3%
Utilizing green technologies	2%	0%

5. Effectiveness of Communication Strategies

(Please rate the effectiveness of each of the following methods used to market your products, where 1 is not at all effective and 5 is extremely effective.)

Most of the members believe their website is most effective in marketing their products; trade shows are the next most effective. (Note: n=58.)

Mean Avg. 1=not at all effective, 5=extremely effective	2013 (n=58)	2012 (n=119)	2011 (n=92)
Website	4.1	4.1	3.8
Trade Shows	3.9	3.8	Not asked
Facebook	3.4	3.4	2.2
Magazine ads	3.4	3.3	Not asked
Twitter	2.4	2.6	2.3

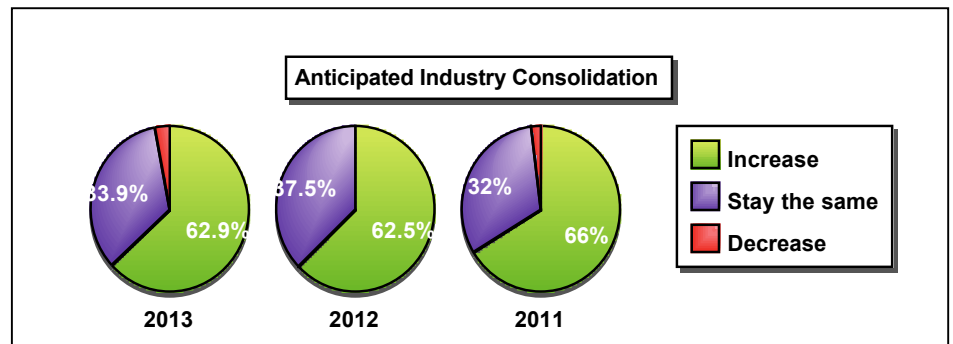
Other Trends

6. Anticipated Industry Consolidation

(What is your opinion on industry consolidation?)

Nearly two-thirds of respondents believe industry consolidation will increase and 34% believe it will stay the same. (Note: n=62.)

Results are similar to those from 2012 and 2011.



7. Gain from Membership in FAMA/FEMSA

(Finally, what value do you gain as a member of FAMA or FEMSA?)

A variety of comments were made regarding what was gained by being a member. Most believe they gain networking opportunities, industry trends and data, and the ability to influence the industry. See Appendix B for complete list of comments.

- "Industry news, ability to connect with colleagues and experts in the industry."
- "Networking. Awareness."
- "Industry specific data. Economic trends."
- "Information on the industry is the only thing I see that has helped me."
- "Learn more about our industry."
- "Industry information and support."
- "Overall health and direction of our industry from a global perspective. Chance to interface with peers."
- "To have a voice in changes or understand the changes to our industry of the guidelines of NFPA."
- "Opportunity for networking, to gain information on marketplace."
- "Networking, statistics."
- "Networking; regulations awareness; trends."
- "Statistics, industry relationships."

Appendix A—Survey

FAMA/FEMSA 2014 Member Companies Outlook Survey

1. What are the biggest trends which are currently affecting your industry?

2. How do you expect your business to change during 2014?

- ☐ Increase over 20%
- ☐ Increase 11-20%
- ☐ Increase 1-10%
- ☐ No change
- ☐ Decrease 1-10%
- ☐ Decrease 11-20%
- ☐ Decrease more than 20%

3. How do you expect your business to change over the next three years (2014-2016)?

- ☐ Increase over 20%
- ☐ Increase 11-20%
- ☐ Increase 1-10%
- ☐ No change
- ☐ Decrease 1-10%
- ☐ Decrease 11-20%
- ☐ Decrease more than 20%

4. What percentage of your business is related to the emergency market?

- ☐ Less than 25%
- ☐ 26 to 50%
- ☐ 51 to 75%
- ☐ More than 75%

5. What percentage of your sales do exports represent?

- ☐ None (go to Q5)
- ☐ Less than 5%
- ☐ 5 to 25%
- ☐ 26 to 50%
- ☐ More than 50%

6. Over the next 3 years, what do you expect to happen with the level of exports from your company, in terms of sales volume?

- ☐ Increase over 20%
- ☐ Increase 11-20%
- ☐ Increase 1-10%
- ☐ No change
- ☐ Decrease 1-10%
- ☐ Decrease 11-20%
- ☐ Decrease more than 20%

7. Please estimate the percentage of your primary business sales in each of the following areas so that the total is 100%.

Northeast US _____

Southeast US _____

Midwest US _____

Western US _____

Canada _____

Other (please specify location and percent) _____

Appendix A—Survey

8. Do you sell to the military?

- ☐ Yes: percentage of primary business sales _____
- ☐ No

9. What is your current factory capacity?

- ☐ Full
- ☐ 75% to 99%
- ☐ 50% to 74%
- ☐ Less than 50%
- ☐ Not applicable

10. What do you anticipate your factory capacity will be in 3 years?

- ☐ Full
- ☐ 75% to 99%
- ☐ 50% to 74%
- ☐ Less than 50%
- ☐ Not applicable

11. What change is expected in the level of capital investment over the next 3 years?

- ☐ Increase over 20%
- ☐ Increase 11-20%
- ☐ Increase 1-10%
- ☐ No change
- ☐ Decrease 1-10%
- ☐ Decrease 11-20%
- ☐ Decrease more than 20%

12. What do you expect in terms of product lead times over the next 3 years?

- ☐ They will improve
- ☐ They will stay the same
- ☐ They will decline
- ☐ Not applicable

13. How many total employees at your company are involved in fire apparatus or equipment manufacturing?

- ☐ Fewer than 50
- ☐ 50 to 199 employees
- ☐ 200 to 499 employees
- ☐ 500 to 999 employees
- ☐ 1000 employees or more

14. What is your planned full-time employment for next year, 2014?

- ☐ Increase over 20%
- ☐ Increase 11-20%
- ☐ Increase 1-10%
- ☐ No change
- ☐ Decrease 1-10%
- ☐ Decrease 11-20%
- ☐ Decrease more than 20%

15. How much will employment change over the next 3 years?

- ☐ Increase over 20%
- ☐ Increase 11-20%
- ☐ Increase 1-10%
- ☐ No change
- ☐ Decrease 1-10%
- ☐ Decrease 11-20%
- ☐ Decrease more than 20%

Appendix A—Survey

16. How concerned are you about each of the following issues? Please rate on a scale of 1 to 5, where 5=Keeps me up at night and 1=This doesn't impact our business.

	Does not impact our business (1)	(2)	(3)	(4)	Keeps me up at night (5)
Federal taxes					
State/local taxes					
Federal regulation					
Insurance costs					
Energy costs					
Funding/budgets					
Overall economic conditions/general sales declines					
Industry conditions					
Cost of raw materials					
Liability					
Health care costs					
Housing market					
Availability of credit					
Competition					
Industry conditions					

17. What is your opinion on industry consolidation over the next three years?

- ☐ It will increase
- ☐ It will stay about the same
- ☐ It will decrease

18. What line(s) of business are you in? **(Please check all that apply.)**

- ☐ Apparatus
- ☐ Apparatus components
- ☐ Protective clothing
- ☐ SCBA
- ☐ Other (please specify)

19. How many manufacturing locations do you have in each of the following places?

US _____
 Canada _____
 Central America _____
 South America _____
 Europe _____
 Asia _____
 Other (please specify) _____

20. Is your business being negatively impacted by the economy?

- ☐ Yes
- ☐ No
- ☐ Not sure

Appendix A—Survey

21. Which of the following strategies are you using to get through these tough economic times? (**Check all that apply.**)

- ☐ Focusing on higher margins
- ☐ Becoming a low cost provider
- ☐ Becoming more diversified by entering new markets
- ☐ Becoming more diversified by entering new markets by focusing on several markets
- ☐ Becoming more specialized by focusing on niche markets
- ☐ Focusing more on exports
- ☐ Utilizing green technologies
- ☐ Developing partnerships/outsourcing
- ☐ Other (please specify) _____

22. Which of the strategies listed above do you think is or will be the most successful? (**Check the one best answer.**)

- ☐ Focusing on higher margins
- ☐ Becoming a low cost provider
- ☐ Becoming more diversified by entering new markets
- ☐ Becoming more diversified by entering new markets by focusing on several markets
- ☐ Becoming more specialized by focusing on niche markets
- ☐ Focusing more on exports
- ☐ Utilizing green technologies
- ☐ Developing partnerships/outsourcing
- ☐ Other (please specify) _____

23. Please rate the effectiveness of each of the following methods used to market your products, where 1 is Not at all Effective and 5 is Extremely Effective. If your company is not using a particular method, please mark N/A.

	Not at all effective	Not effective	Neither	Effective	Very effective	N/A
Website						
Facebook						
Twitter						
Magazine advertisements						
Trade shows						
Other (please specify)						

24. Finally, what value do you gain as a member of FAMA or FEMSA?

As is our practice with all member surveys, all information supplied will be held in STRICT CONFIDENCE by Karen Burnham and the webmasters. No member's identity will be connected to any response or disclosed to any Board or association member.

For administrative purposes only, please indicate:

Name:

Company:

Thank you!

Appendix B–Verbatim Comments

1. What are the biggest trends which are currently affecting your industry?

- Fire departments are hiring more recruits and purchasing more PPE as a result.
- Municipal spending priorities
- Personal Protective Equipment from Asia is costing the US manufacturing jobs.
- Company consolidations and acquisitions, leading to reevaluation of equipment and subsequent less demand for new equipment. More emphasis placed on refurbishing of existing equipment.
- The health and wellness of our distribution channel partners.
- Lack of funds
- New product development
- Slow growth in the fire industry, looking for market outside of fire/emergency and international. More cost conscious
- Excessive regulations
- High expectations with small budgets.
- Healthcare
- Economy
- Fleets keeping equipment longer and figuring out how to get by with less. Fire departments buying fewer apparatus and smaller apparatus.
- Funding, loss of firefighters
- Low city budgets and fluctuating exchange rates.
- Health Care costs Low building trends
- Growth of the international export market
- Digital controls, panels and lighting
- No comment
- Grants and more competition
- Grants and more competition
- Price competition from industry peers who make or buy products in or from Asia or Europe at lower cost.
- Order volumes / economic conditions
- Increase in use of cooperative procurement
- Staying current on products, services and interest topics for emergency responders
- Improving macroeconomics and public tax base driven by improving housing - showing up in stronger bookings in 2013.
- Lack of funding / fire depts. Doing more with less
- Deals are taking many more months to complete and a noticeable drop in new requests
- Going up
- Consolidation/international selling
- Economy / International Business
- Regulations and lack of tax revenues
- Group Purchasing, Cost of Ownership Analysis, Retirement of Experienced Fleet Management
- Municipal business is flat
- One set of gear per firefighter
- Consolidation of customers.
- Foreign Competition and Federal, State, & Local economic factors.
- Smaller more effective equipment and vehicles
- Return to an expanding economy creating demand.
- Funding
- Lack of funds FEMA grant delays and People not buying due to they think they may get the FEMA grant!
- Tight end-user budgets
- Reduced spending at government levels
- Budgetary restraints due to increase expenses and lower property tax revenues.
- Big need for lower cost equipment.
- Reduction of grant money health insurance
- Lack of quality employees
- Plant shut downs due to weather
- Fuel efficiency products
- Cost consciousness
- DoD spending

Appendix B–Verbatim Comments

- Fewer end users and the same # of manufacturers. Less \$ appropriated than years ago although it has stabilized
- Federal funding for emergency equipment
- Budget cuts
- Managing costs to be competitive
- Economic recovery is slow
- Obama care
- Low budgets
- Budget cuts
- Municipal budgets, government regulation
- Lack of Federal funding (budget impasse and sequestration) and the winding down of the Afghanistan War
- Fire department finances
- Market getting smaller, more manufacturers getting in.

24. Finally, what value do you gain as a member of FAMA or FEMSA?

- Industry news, ability to connect with colleagues and experts in the industry
- Networking. Awareness
- Industry specific data Economic trends
- Information on the industry is the only thing I see that has helped me.
- Learn more about our industry.
- Industry information and support.
- Overall health and direction of our industry from a global perspective. Chance to interface with peers,
- To have a voice in changes or understand the changes to our industry of the guidelines of NFPA.
- Opportunity for networking, to gain information on marketplace.
- Networking, statistics,
- Networking; regulations awareness; trends
- Statistics, industry relationships
- Networking with companies within the industry.
- Industry networking and insight, developing trends and statistics, expert commentary.
- Networking, information from speakers
- Networking industry trends/stats
- Networking.
- Comradery, friends, trends, market outlooks, sharing information
- Staying current with industry
- Sharing ideas with industry experts, learning more about related industries, making contacts with new people/other companies, education at the Annual Meeting to name a few!
- Industry knowledge
- Industry knowledge and connections
- Staying current on industry trends; Objective information being shared; the annual conference in the fall is great.
- Industry knowledge, partnering and support and having a voice
- Networking. Understand issues facing industry and get a better perspective.
- Connectivity to the industry
- Relationships, trust
- Statistics and Technical Committee Involvement
- Relationships and Data
- Networking, access to stats, tech committee involvement & recognition as FAMA member in the market
- Market Statistics, Industry Networking, Governmental Insight and Industry Wide Voice
- Industry directions and business options
- Insight into trends. Increased ability to monitor competition. Partnering opportunities.
- The networking is helpful throughout the year. The spring and fall meeting provide lots of information about what is happening in our industry.
- Knowledge industry trends
- Legislative, Networking, UIG
- Networking, access to stats and info from Tech Comm
- Get a good Peer-to-Peer evaluation for a very unique and niche industry segment

Appendix B–Verbatim Comments

- Industry updates
- Industry news and information networking voice in Washington
- Networking with other members
- Networking and understanding trends due to FEMSA/FAMA positions in the market
- The ability to network and learn more about this industry.
- Industry contacts
- Networking
- Networking and learning about industry trends. Hearing feedback from end user guests Round table discussions with ideas on how to better our company
- Industry awareness
- Industrial information from both organizations, Statistics
- Networking
- Communication from members about emerging trends
- Connection to the emergency services industry
- Comradery, help, sales and products
- New relationships, reputation, credibility
- Statistics, Relationships
- Industry contacts and information
- Statistics education