

FAMA/FEMSA Member Outlook Report

February 2013

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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: December 2012–February 2013.

A total of 136 member companies participated in the survey. The online survey consisted of 23 questions.

Summary of Findings

Members are positive about their industry. Members 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—90% anticipate their business to grow over the next three years.
- 71% of respondents believe their capital investments will increase over the next three years.
- 82% of respondents expect exports to grow over the next three years.
- 74% of members are projecting full-time employment growth over the next three years.

Introduction

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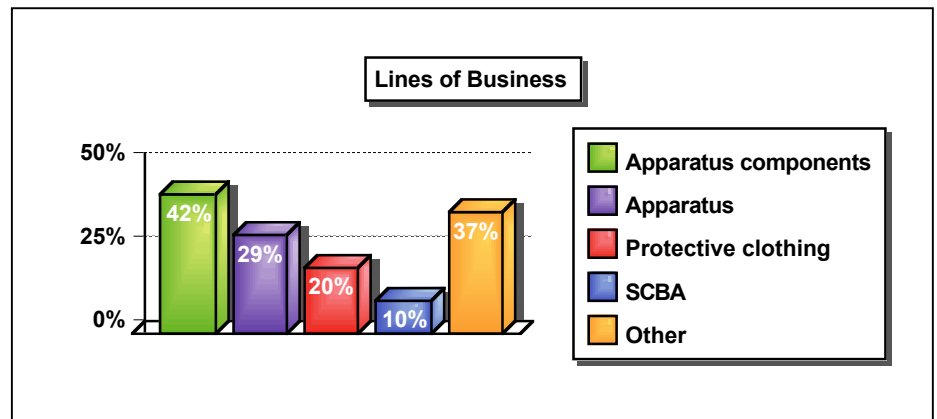
A total of 136 member companies participated in the survey. The online survey consisted of 23 questions. The survey was blasted out to members of both the Fire Apparatus Manufacturers' Association (FAMA) and the Fire and Emergency Manufacturers and Services Association (FEMSA). The survey was written by Jeff Hupke.

Respondent Characteristics

1. Lines of Business

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

Forty-two percent of respondents sell apparatus components and 29% sell/manufacture apparatus. Thirty-seven 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=128.)

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

Midwest US	27%
Northeast US	25%
Southeast US	21%
Western US	18%
Canada	16%
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 295 manufacturing locations in the US and 54 in Europe.

	Total locations	1 location	2-5 locations	More than 5 locations
US	295	59	32	4
Europe	54	9	10	3
Asia	48	12	8	1
Canada	13	11	1	0
South America	13	2	2	1
Central America	8	3	2	0
Other	2	2	0	0

Business Trends

1. Trends Affecting Industry

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

For two-thirds of the respondents, the “economy/budget cuts/lack of funding/down market” are most affecting them; 8% indicated “NFPA standards/meeting standards/protocol/gov regulations.” See Appendix B for complete list of verbatim comments.

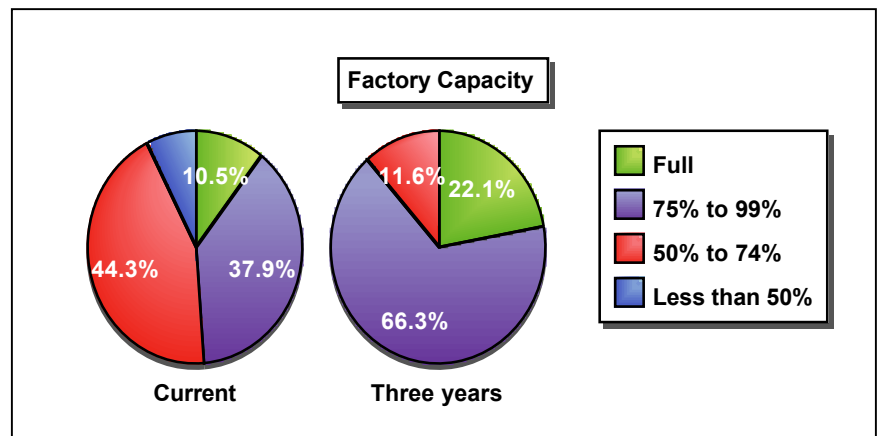
Economy/Budget cuts/Lack of funding/grants/market down	65%
NFPA standards/meeting standards/protocol/gov regulations	8%
Technology/e-business/media	5%
Issues with staffing/less staffing/recruitment & retention	4%
Distributor channel/production/large products	4%
Cost/price increase	3%
Do more with less/short term thinking	3%
Pay & benefits/pension/healthcare costs	3%

- “Fire apparatus market is down in the province of Quebec.”
- “Cooperative purchasing.”
- “The UL re-certifications for NFPA 1971. The grant money amount available.”
- “Funding both at the federal, state and local level. Shrinking size of the fire service and the increasing costs of products we sell due to regulations and standards causing shrinking unit sales.”
- “Customers reorganizing their funding.”
- “Sales of trucks being down.”
- “Economic slowdown.”
- “Imported PPE (fire gloves) from Pakistan, China and Indonesia.
- “Introduction of a new NFPA standard (1981/1982) for breathing apparatus in summer 2013. Stabilization of budget situations for municipalities. (Slight improvements over past 6-12 months noted.)”

2. Current and Projected Factory Capacity

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

Eleven percent of respondents’ factories are currently full and 38% are running at 75% to 99% of capacity. Within three years, 22% are anticipated to be at full capacity and two-thirds will be at 75% to 99% of capacity. (Note: n=124.)



In comparing the three-year projections from this year’s study to last year’s study; results were similar. However, factories are running at a lower capacity overall this year as compared to last year.

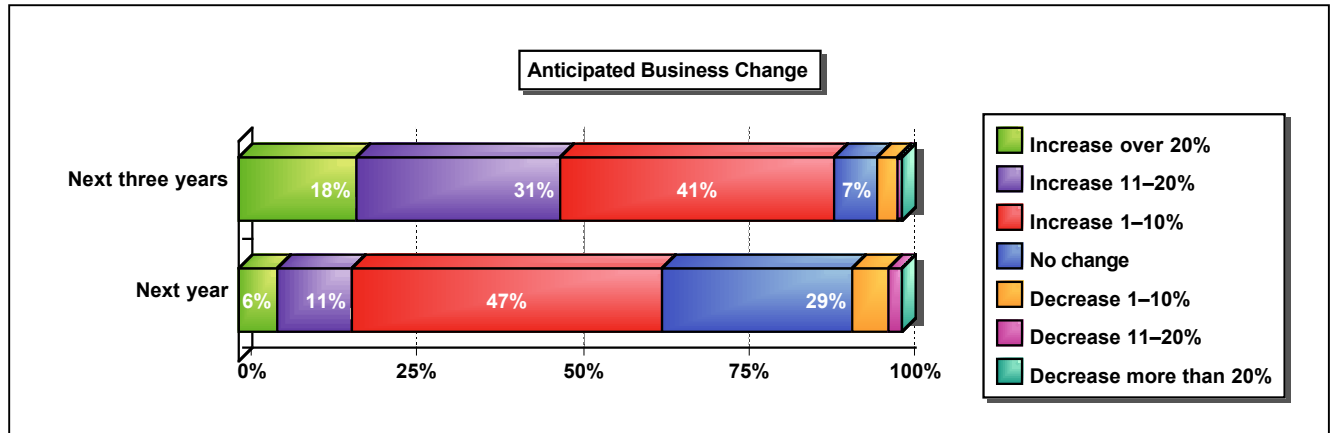
	Current		Three years	
	2012	2011 (n=75)	2012	2011 (n=75)
Full	11%	9%	22%	24%
75% to 99%	48%	54%	66%	67%
50% to 74%	44%	32%	12%	9%
Less than 50%	7%	5%	0%	0%

Business Trends

3. Anticipated Business Change

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

Just less than two-thirds of respondents (64%) expect their business to increase next year and almost all (90%) expect their business to increase during the next three years. Eighteen percent of respondents anticipate their business growing over 20% during the next three years and 31% believe it will grow 11% to 20%. (Note: n=136.)



Results from the 2012 study mirror those from the 2011 study.

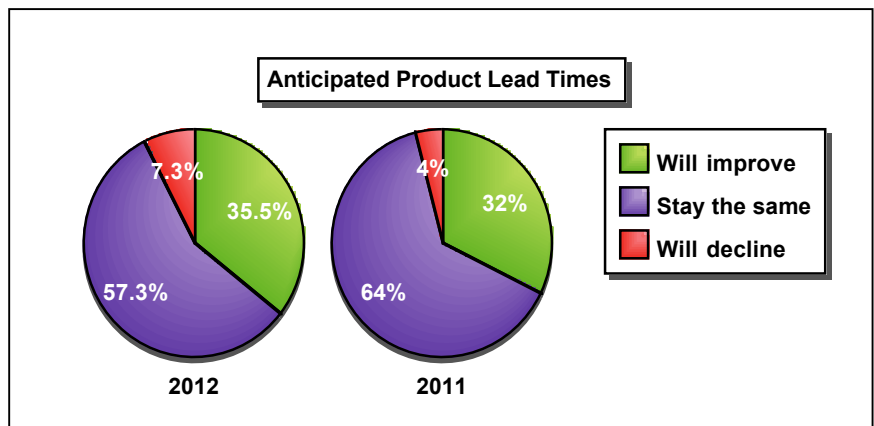
	Current		Three years	
	2012 (n=136)	2011 (n=92)	2012 (n=136)	2011 (n=92)
Increase over 20%	6%	9%	18%	17%
Increase 11-20%	11%	13%	31%	37%
Increase 1-10%	47%	42%	41%	39%
No change	29%	24%	6%	4%
Decrease 1-10%	5%	12%	3%	2%
Decrease 11-20%	2%	0%	<1%	0%
Decrease more than 20%	0%	0%	0%	0%

4. Anticipated Product Lead Times Over Next Three Years

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

Just over one-third of respondents anticipate product lead times will improve over the next three years and 57% believe they will stay the same. Seven percent of respondents anticipate they will decline. (Note: n=124.)

Results from the 2012 study mirror those from the 2011 study.

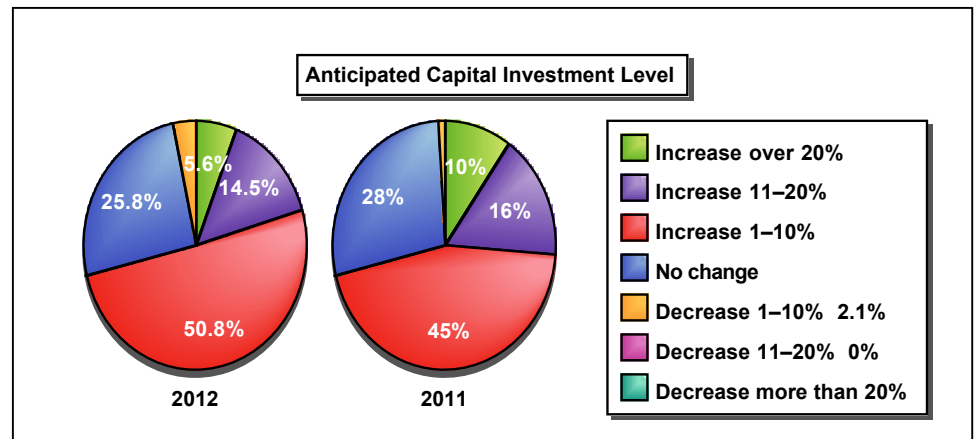


Business Trends

5. Expected Change to Capital Investment Over Next Three Years

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

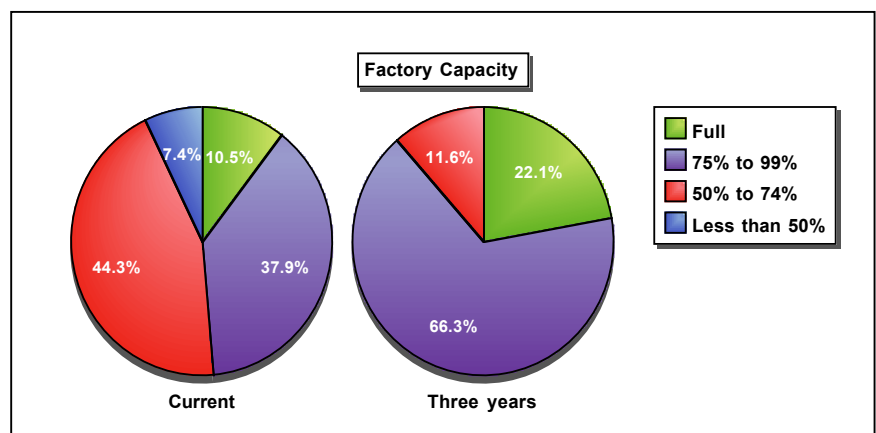
Over the next three years, 71% of respondents believe their capital investments will increase—6% of respondents believe their investment will increase over 20%. (Note: n=124.)



6. Factory Capacity

(What is your current factory capacity? What do you anticipate your factory capacity will be in three years?)

Eleven percent of current respondents believe their factory capacity is full; however, 22% of those same respondents anticipate in three years their factories will be full. (Note: n=124.)

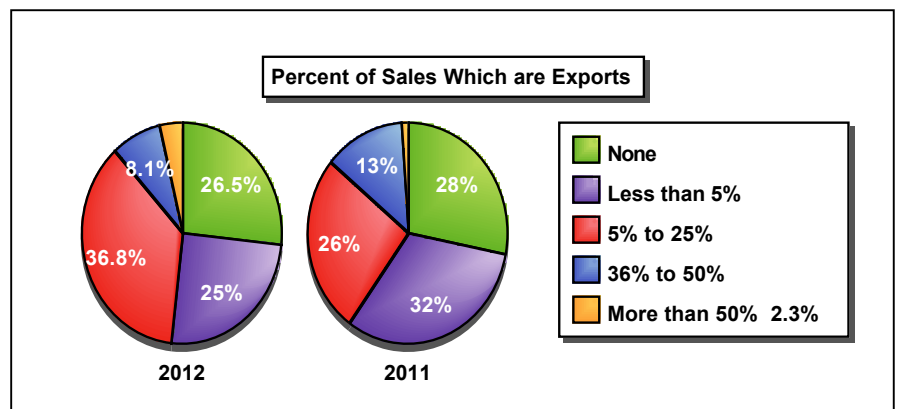


7. Percent of Sales Which are Exports

(What percent of your sales do exports represent?)

Seventy-two percent of respondents indicated at least some of their sales are from exports—25% indicated exports are less than 5% of their overall sales and 37% export 5% to 25% of their overall sales. (Note: n=136.)

Overall, the percent of sales which are exports grew slightly from 2011 to 2012.



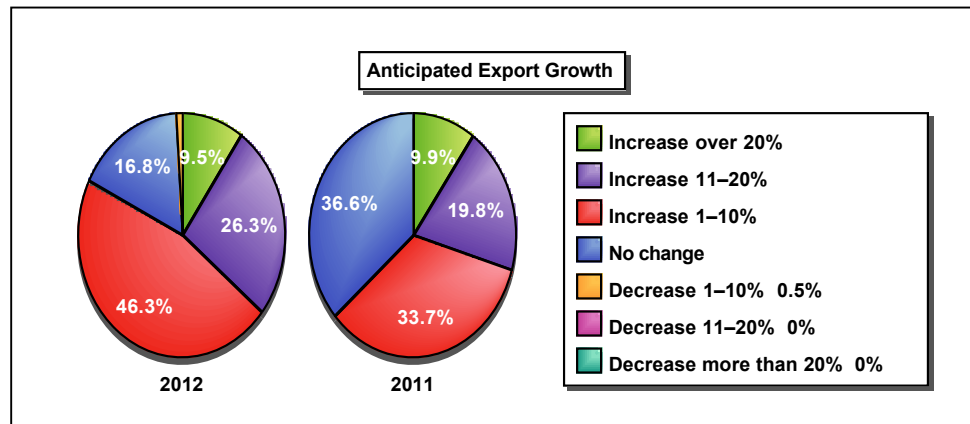
Business Trends

8. Anticipated Export Growth

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

Eighty-two percent of respondents expect exports to increase, the remaining respondents do not project a change. (Note: n=136.)

Respondents to the 2012 survey are anticipating higher export growth than those respondents from the 2011 survey.

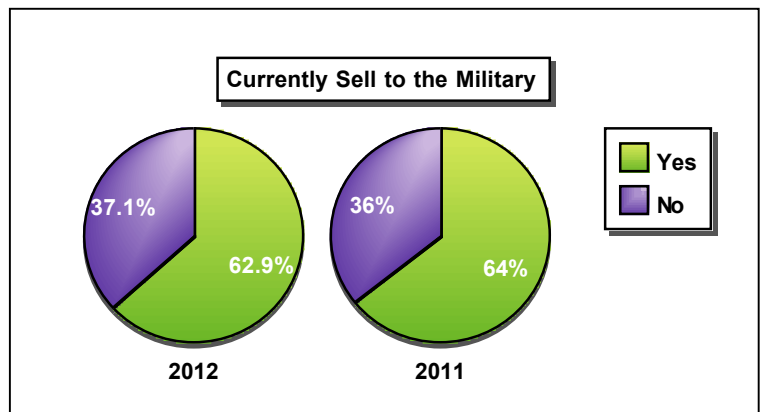


9. Currently Sell to Military

(Do you sell to the military?)

Almost two-thirds of respondents (63%) currently sell to the military. (Note: n=124.)

Of those who sell to the military, on average about 11% of their overall sales are to the military, from a low of about 1% to a high of about 50%.

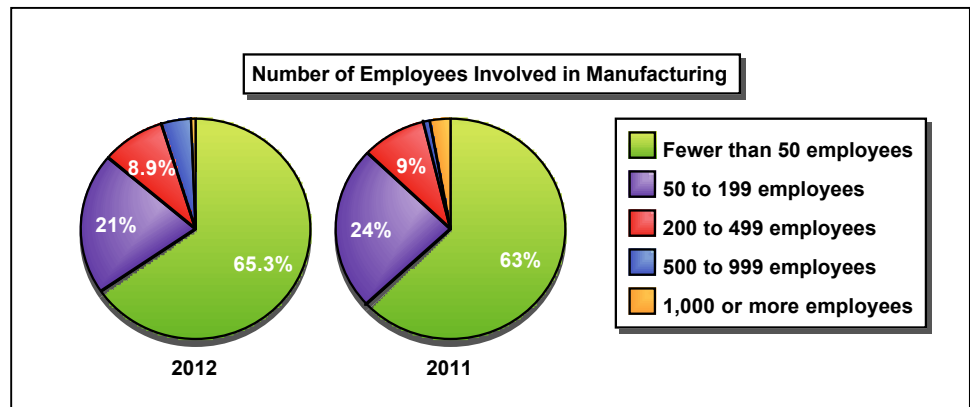


Employment Trends

1. Current Employment

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

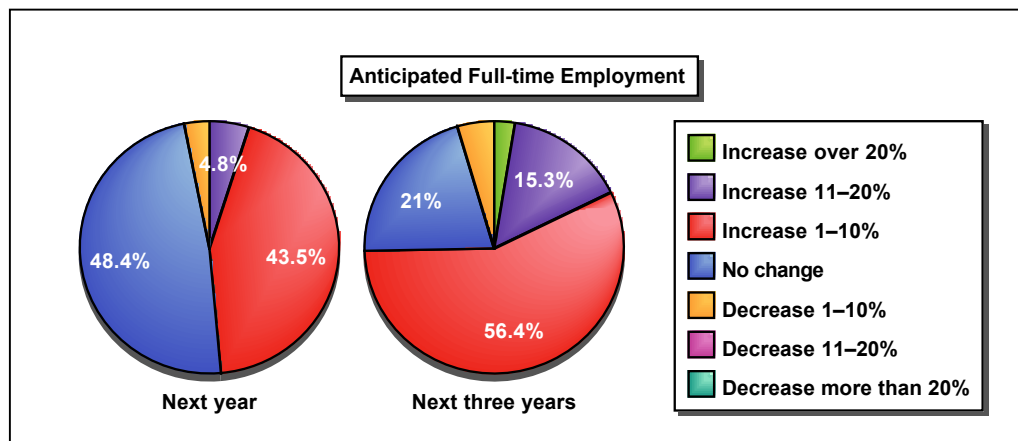
Just less than two-thirds of member companies have fewer than 50 employees involved in manufacturing; 4% have 500 or more employees. (Note: n=92.)



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 (48%) or stay the same (48%). Over the next three years, 74% of members believe full-time employment will increase. (Note: n=92.)



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 the overall economic conditions are what keep members up at night. The housing market and availability of credit are the least worrisome. (Note: n=120.)

This is similar to last year's results.

	Keeps me up at night (5)	(4)	(3)	(2)	This does not impact my business (1)
Health care costs	38%	35%	16%	8%	3%
Overall economic conditions/general sales declines	32%	46%	18%	4%	0%
Insurance costs	31%	33%	22%	13%	<1%
Funding/budgets	29%	44%	20%	6%	<1%
Federal regulation	24%	32%	26%	14%	4%
Federal taxes	22%	33%	27%	14%	4%
State/local taxes	14%	29%	34%	18%	5%
Industry conditions	14%	44%	35%	7%	0%
Liability	12%	22%	40%	20%	6%
Energy costs	7%	28%	39%	24%	<1%
Cost of raw materials	7%	30%	41%	19%	3%
Competition	6%	27%	49%	16%	3%
Housing market	4%	20%	27%	25%	24%
Availability of credit	2%	12%	33%	39%	14%

2. Strategies Using for Economic Times

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

Two-thirds of members are trying to become more diversified by entering new markets as one of their strategies. Forty-four percent indicated that they are focusing more on exports. Only 4% are utilizing green technologies. (Note: n=120.)

The results from the 2012 study mirror those of the 2011 study.

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

3. Most Successful Strategy

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

One-third of respondents believe entering new markets will be the most successful strategy; 16% indicated focusing more on exports. (Note: n=120.)

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

Other Trends

4. 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=119.)

Note: Some questions were not asked in the 2011 study.

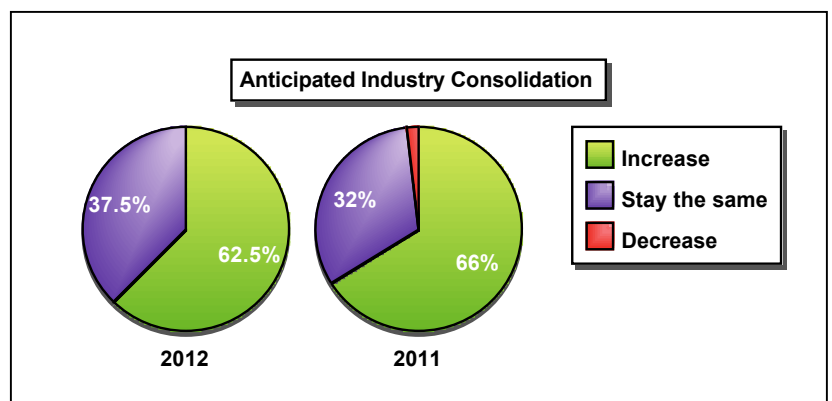
Mean Avg. 1=not at all effective, 5=extremely effective	2012 (n=119)	2011 (n=92)
Website	4.1	3.8
Trade Shows	3.8	Not asked
Facebook	3.4	2.2
Magazine ads	3.3	Not asked
Twitter	2.6	2.3

5. Anticipated Industry Consolidation

(What is your opinion on industry consolidation?)

Just under two-thirds of respondents believe industry consolidation will increase and 38% believe it will stay the same. (Note: n=120.)

Results are similar to those from 2011.



6. 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 by members. Most believe they gain networking opportunities, industry trend and data, and the ability to influence the industry. See Appendix B for complete list of comments.

- “Membership with both organizations has helped the NFFF increase its awareness among the membership of the two.”
- “Receive industry information on a more timely basis and the opportunity to network with suppliers and other dealers/distributors.”
- “Interaction with distributors, education and information on the industry.”
- “Gets our name out there and we meet with other people in our trades. Learn what they are doing.”
- “Helps with legitimacy.”
- “Finding out about what is happening throughout other regions of the country.”
- “Networking and learning of new trends. Sharing ideas with customers. Opportunity to help promote the importance of our industry relative to jobs and to making our country a safer place.”

Appendix A—Survey

FAMA/FEMSA Member Companies Survey – Outlook

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

2. How do you expect your business to change during 2013?

- ☐ 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 (2013-2015)?

- ☐ 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 sales do exports represent?

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

5. 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%

6. 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

7. Do you sell to the military?

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

8. What is your current factory capacity?

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

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

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

10. 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%

11. 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

12. 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

Appendix A—Survey

13. What is your planned full-time employment for next year, 2013?

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

14. 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%

15. 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					

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

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

Appendix A—Survey

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

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

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

US _____

Canada _____

Central America _____

South America _____

Europe _____

Asia _____

Other (please specify) _____

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

- ☐ Yes
- ☐ No
- ☐ Not sure

20. 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/outourcing
- ☐ Other (please specify) _____

21. 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/outourcing
- ☐ Other (please specify) _____

Appendix A—Survey

22. 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)						

23. 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

FAMA/FEMSA Member Verbatims

Q1 What are the biggest trends which are currently affecting your industry?

- Budget (9)
- The reduced spending due to municipal budgets
- The continued efforts of the fire service community to identify and implement safety initiatives to continue the downward trend in firefighter line of duty deaths and injuries.
- Budget cuts to public safety funding, due to property tax caps.
- Imports
- Fire apparatus market is down in the province of Quebec
- Cooperative purchasing
- The UL re-certifications for NFPA 1971. The grant money amount available
- Funding both at the federal, state and local level. Shrinking size of the fire service and the increasing costs of products we sell due to regulations and standards causing shrinking unit sales.
- Customers reorganizing their funding
- Sales of trucks being down
- Economic slowdown
- 1) Economy 2) reduced number of firefighters
- National standard apparatus increase in association management services digitization of training materials
- Imported PPE (fire gloves) from Pakistan, China and Indonesia.
- Introduction of a new NFPA standard (1981/1982) for breathing apparatus in summer 2013. Stabilization of budget situations for municipalities. (Slight improvements over past 6-12 months noted)
- Economy - we are just starting to see things pick up with our business. The last two years have been brutal. Hopefully, this is the city budget cycles finally catching up with the rest of the economy and not another short-lived blip.
- Cutting of discretionary funding for programs such as ours
- Economic downturn, staffing cuts, protocols.
- US manufacturers going overseas.
- Increased government regulations & healthcare costs
- Low growth economy
- Decrease in municipal spending
- Funding of purchases
- Need for shorter apparatus
- We sell to many industries. The biggest 'issue' is uncertainty in the marketplace. If you want a trend I would say it's the transformation of our society to a 'throw-away'. We want to buy as cheap as possible and when it breaks - throw it away and replace it. Short term thinking I guess would be another, which is a product of uncertainty.
- With widespread belt tightening, departments become more careful when allocating where to spend budgeted dollars. Looking more closely at value for the money. More willing to look at costs over the long term vs. Up front costs. Transition trend continues regarding departments switching from rubber ff boots to leather ff boots.
- Economy dictates a lateral growth rather than a vertical growth plan. With tight budgets, it takes much longer for potential customers to make decisions than it did in the past. This slows cash flow so our budgets become restrained.
- Federal health care guide lines
- Sequestration
- The economy and uncertainty that congress will act like adults.
- Grants
- Government financing, budget cuts.
- Increasing customer base.
- Consolidation of multiple pieces of equipment into what I am calling a hybrid piece. The small rural volunteer departments are looking at pumper/tankers and brush/rescues as means to accomplish firefighting goals with less equipment.
- Purchasing of mini pumps.
- More departments want real time cad drawings for a proposal not just a write up.

Appendix B—Verbatim Comments

- E-business
- Seeing vendors increase prices more than usual.
- Cutting municipal budges/grants/funding
- Economy continues to affect our productivity
- Government issues with taxes and fuel. Everyone is holding on to their money and preparing for rougher times ahead.
- Municipalities have not recovered to previous levels of tax revenue which continues to postpone apparatus purchases.
- Economic pressures facing municipalities.
- Tight/reduced discretionary budget dollars
- Fuel efficiencies, and slow economic recovery
- Storz connections on hydrants, hose and adapters
- The methods in which patients on stretchers are loaded into vehicles for transport.
- Restrictive budgets
- Fire department funding and budget reductions and associated challenges
- Consolidation and budget cuts.
- Tax revenue
- Do more with less
- Oil mining & industrial economy.
- The fact that fire truck sales nationwide has decreased by approximately 50%.
- Limits on money available by cities.
- Pressures on municipalities affecting buying decisions in a negative manner.
- Funding
- Gov't regulations and reduced funding
- To many trade shows every agency is on board trying to conduct shows with tremendous expenses and poor attendance other than the FDIC
- Lack of public funding and costs.
- Cut backs in equipment budgets.
- Low municipal tax collection and poor new housing starts are factors eroding our core business.
- Low fire truck sales
- Change in FEMA funding and cutting back on gov't help to departments.
- Constrained budgets. Weakening distributor channel.
- Technology
- Limited local gov't budgets.
- Lack of funding to purchase from fire departments, people retiring that have the skill and knowledge and purchasing authority
- NFPA 1971 and 1851 changes
- Health care, taxes, energy cost and the unknown
- Slow FEMA money and shrinking local tax dollars
- Fire services are changing from pumper trucks and tankers to pumper tankers and they are buying more and more mini rescues.
- Towns and committees un-willing to commit to large purchases. The need for the apparatus is still there, but fire departments are not being given the green light to move forward, (yet).
- Shift from rural areas looking for new to looking at refurbishment and cost reduction
- Lack of funding
- Decreased municipal budgets
- The government
- Tight budgets. Customers not buying aerals.
- Development of new kinds of equipment to meet changes in vehicle designs
- The reduced municipal budgets for fire apparatus purchases.
- Materials cost shipping
- Loss of funding
- Curtailing capital spending by municipalities
- The FAA funding of us sales
- Funding and smaller budgets for PPE
- Budget constraints and uncertain economic conditions

Appendix B—Verbatim Comments

- Fire chiefs seeking comparisons on purchasing products and information on the accreditation process.
- Economy and fire truck production
- Reduction of city budgets
- We provide a unique product that is mainly used in large disasters. The stress on budgets for our customers means that are products can be put off until the situation is better economically
- Smaller budgets, doing more with less
- International orders are up.
- Tighter budgets, changes to funding
- Budgets and technology changes
- The economic uncertainty
- The downturn in business and the shaky financial issues of companies
- Moving to broader markets / segments as government spending gets tighter.
- Customers funding -international expansion -new technology adoption rate
- Municipal spending and available money
- Municipal funding
- Export and electronic media
- Reduced distributor profitability due to excess manufacturing capacity. Small business insurance costs for health care. Recruitment and retention of qualified sales and service staff.
- Internet sales
- Consolidation
- Lack of municipal funds.
- Reduction in fire department funding. Political climate at federal and state level.
- Decrease in municipal and federal budgets
- Regulations and paperwork seem to mount every month
- Budget increase caps, cooperative purchasing, consumer apprehension
- Fire station closings and smaller operating budgets

Q17. What line(s) of business are you in?

- Rescue equipment (4)
- Service
- Fire equipment
- Training
- Equipment
- Exhaust extraction systems
- Group purchasing and bookstore
- TIC, compressors, communications, accountability software
- Event management
- Ems equipment
- Advertising specialties, print, video, mobile marketing
- Provincial association
- Fire fighting foam, hose, big flow
- Fire dept storage and self rescue products
- Specialty appliances foam
- Helmets
- Training structures
- Electronics, patient treatment
- And repair
- Loose goods
- Gas detectors
- Life safety
- Technical search and rescue equipment
- SCBA cylinder refill appliances
- PPE - non clothing
- Trade show
- Wildland
- Rescue tools

Appendix B—Verbatim Comments

- Fire equipment sales
- Insurance
- Media
- Search and rescue, hazmat audio/video gear
- Ground fire ladders
- Consulting
- Loose equipment
- Life safety rope and related PPE
- Equipment sales
- Equipment manufacturing
- Distribution
- Showers and shelters
- Technical search and rescue equipment

Q20. Which of the following strategies are you using to get through these tough economic times?

- Looking to the non-fire community to provide funding for our services and programs.
- Promoting value proposition versus competition to grow share and improve position.
- Utilizing grant options
- Being more aggressive in marketing/sales efforts
- Continuing product development
- Working more hours!
- Focus on quality and customer service for repeat business.
- Working very hard to take care of existing customers
- Focusing on fixed expenses being more efficient
- Reducing margins
- Increasing distribution sources

Q21. Which of the strategies listed above do you think is or will be the most successful?

- Being more aggressive in marketing/sales efforts
- Quality and service
- Becoming more efficient

Q23. Finally, what value do you gain as a member of FAMA or FEMSA?

- Networking (7)
- Up to date information on Industry trends and regulations. Regular contacts with member companies.
- Industry information related to production of apparatus is a key benefit
- Membership with both organizations has helped the NFFF increase its awareness among the membership of the two.
- Receive industry information on a more timely basis and the opportunity to network with suppliers and other dealers/distributors.
- Interaction with distributors, education and information on the industry.
- Gets our name out there and meet with other people in our trades. Learn what they are doing
- Helps with legitimacy
- Finding out about what is happening throughout other regions of the country.
- Networking and learning of new trends. Sharing ideas with customers. Opportunity to help promote the importance of our industry relative to jobs and to making our country a safer place
- Ability to network, learn about new trends in the marketplace, share ideas.
- Industry contacts
- We're currently analyzing the advantages.
- Industry knowledge and feedback
- In the loop industry / government knowledge.
- The conference was very informative. Keeping up on industry trends and what the other vendors are doing.
- Helps me better understand industry conditions and how our company compares.
- Networking, consolidated voice of industry for gov't relations, statistics.
- Creditability as a legitimate distributor, as well as the strength of an advocate working on behalf of all of us.
- We're really not a very good fit for FEMSA as we make nothing

Appendix B—Verbatim Comments

- Connections, insight, industry support
- Information on our industry.
- That's a great question. I think the potential value is there, but I haven't been participating to the extent that I would like to be involved. The value has been "just ok," but I think it's more me than you.
- Networking and industry contracts. Government relations.
- We like the NAM reports and the networking.
- Keeps me advised about what is happening in north American industry
- Access to statistics for planning and developing goals, objectives, and visibility to the overall market trends.
- Insights into the market and issues that affect the market
- Marketing techniques, national views, other's perspectives on business
- Unfortunately I have not been able to attend any meetings usually conflicts with other market show dates
- 1 to 10 scale a 7
- Industry knowledge and a warm fuzzy feeling.
- Very good value
- Access to resources, information.
- Knowing what is going on in industry. Personal contacts of value also.
- The wealth of knowledge available through the talented members and association accumulated industry statistics.
- I like the weekly economic report. I look forward to gaining more technical knowledge about NFPA regulations.
- Good value
- Being part of trade organizations that promote high standards in the public safety field
- Trends, friends, colleagues, professionals and market savvy...
- Visibility in the market
- Networking, regulation up-dates and voice, find out what industry (competitors) are doing.
- Industry information. Participation in development of future NFPA standards
- Networking, NFPA
- Ability to meet with people to discuss and listen to differing ideas
- The unity with other members and benefits gained through both associations.
- Networking with customers and competitors
- Both an insight into and the ability to contribute to industry trends and best practices.
- Industry insight, networking opportunities.
- Networking and staying current with issues affecting the industry.
- Encouragement sourcing
- Relationships
- Network on ideas, market trends. High value.
- I find that the networking between companies and individuals while at the meetings is most valuable. Also FAMA statistics.
- Within my category what are my sales compared to competitors.
- Networking. Knowledge. Friendships.
- Gov't matters
- Updates on industry news
- It helps us stay closer to our OEM customers and on top of market conditions.
- It keeps us all in the loop and focused better on what is happening everywhere, not just in our AOR
- Annual meeting is a chance to understand problems, trends, and opportunities. Networking.
- Industry news, business strategies, a voice in government, go to market ideas
- Networking and info on industry
- Keeping abreast of industry trends and building key relationships. We are very proud to be a member of FEMSA.
- A stronger understanding of what is happening in the industry and making sure our company is keeping up with changes in the industry.
- Education and market trends.
- For us in Canada FAMA doesn't change much in our way of working but it gives us a lot of input for the way things are going in the USA
- Industry insight. Knowing how our competitors are working through this down period.
- Marketing insight - tons of information on trends and industry news

Appendix B—Verbatim Comments

- Staying on the radar with congress
- An understanding of what other member companies are doing to increase their chances of success, friendships and networking.
- FEMSA certainly
- Opportunity to network with other people in the industry - gives us a fresh look at what is going on and how other companies deal with things.
- Statistics, technical updates, networking, government updates.
- Up to date on industry trends and competition position
- Industrial insights, commonality of interest in moving market forward.
- Technical info
- The industry interaction and good topics at annual meeting
- Staying connected with the industry.
- Legislative focus / networking / information sharing
- Better understanding of the industry
- Ability to network with upper management of others. Statistics. Kept up to date on government issues.
- Industry insight
- FEMSA provides us with a better understanding of the overall market. It also a voice in Washington.
- I gain value by being a member of FAMA as it allows me to spend time with my clients. It further allows me to speak with members in other areas of the fire industry to see what they are seeing trend wise and economically.
- Networking opportunities as well as feedback from other manufacturers and distributors on market conditions.
- To continue to stay in front of the customer with products and services to meet the needs of the OEM
- Networking and keeping up with trends and changes in the industry
- Industry news and connections.
- The benefits we gain are incredible and hard to limit to one or two items. We constantly see value from these organizations is the industry insight through the statistics provided by the organizations, excellent networking opportunities, and updates on the latest political situations affecting our industry...
- Relationship building at the annually meeting.
- Industry stats and net working
- Chance to fill out surveys
- Market intelligence, a voice in Washington, and building of personal relationships with other in our industry.
- Get to meet dealers from around the country and brainstorm.
- Networking and industry temperature
- Networking, industry knowledge, programs at annual meeting
- Great value for the price.
- Industry data and help in Washington
- Networking, inside information on industry trends
- Keeping up with current events in our industry.
- Market information industry contacts