



FIRE
APPARATUS
MANUFACTURERS'
ASSOCIATION

FAMA Industry Outlook Survey Results **(Winter 2017-18)**

Education Committee (Surveys):

Phil Gerace

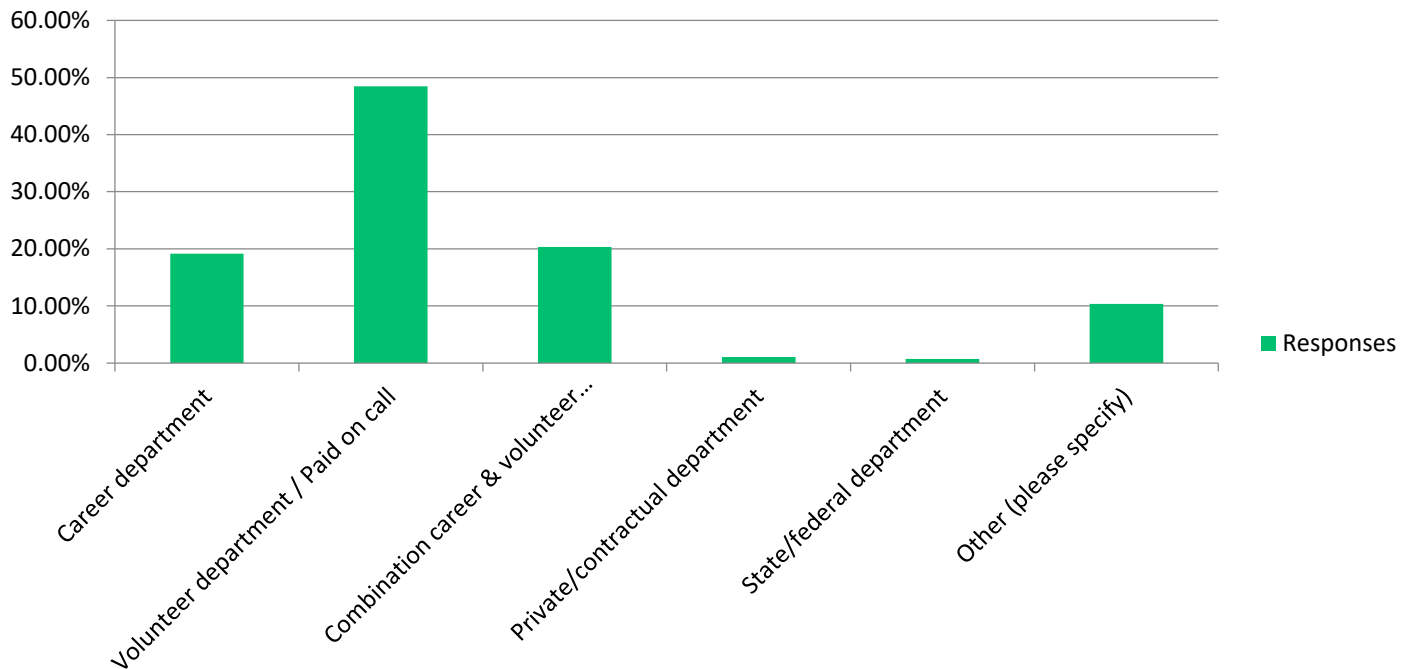
Zac Soderberg

John Slawson, Board Liaison



2018 FAMA SPRING MEETING
FEBRUARY 21-24
Coronado Island Marriott Resort and Spa

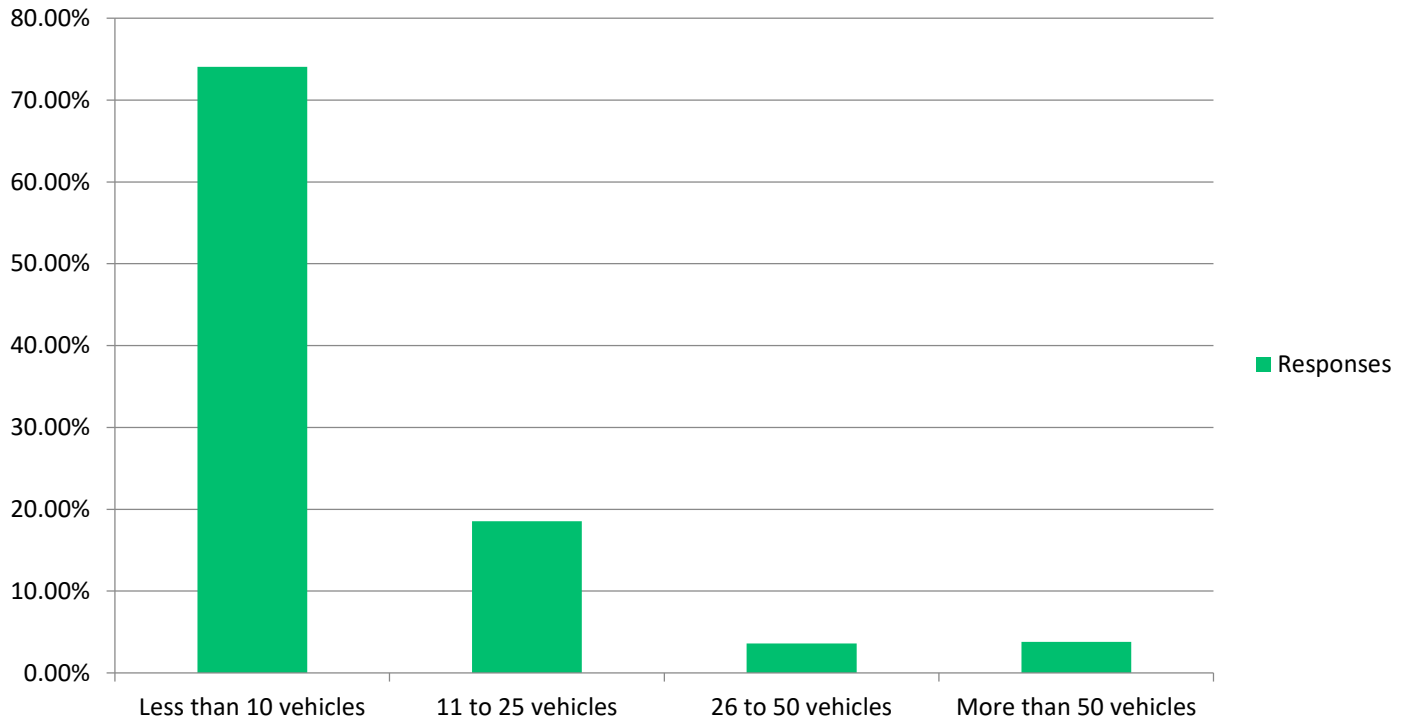
What type of organization is your fire department?



What type of organization is your fire department?

Answer Choices	Responses	
Career department	19.17%	271
Volunteer department / Paid on call	48.44%	685
Combination career & volunteer department	20.30%	287
Private/contractual department	1.06%	15
State/federal department	0.71%	10
Other (please specify)	10.33%	146
Answered		1414
Skipped		0

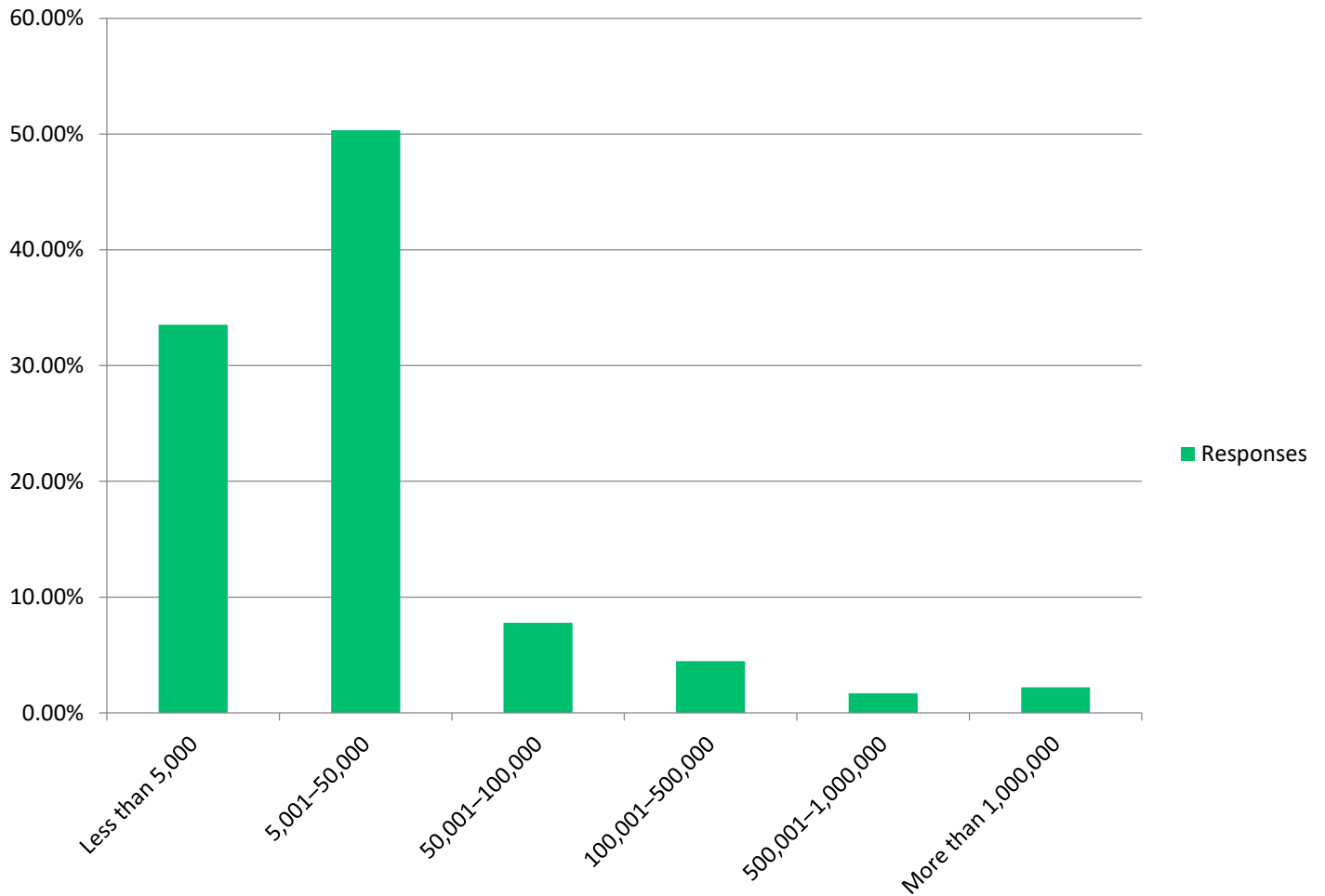
What is the size of your combined front line and reserve fire apparatus fleet (not including ambulance and automobiles).



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Answer Choices		Responses	
Less than 10 vehicles		74.05%	1047
11 to 25 vehicles		18.53%	262
26 to 50 vehicles		3.61%	51
More than 50 vehicles		3.82%	54
		Answered	1414
		Skipped	0

What size population does your department serve?



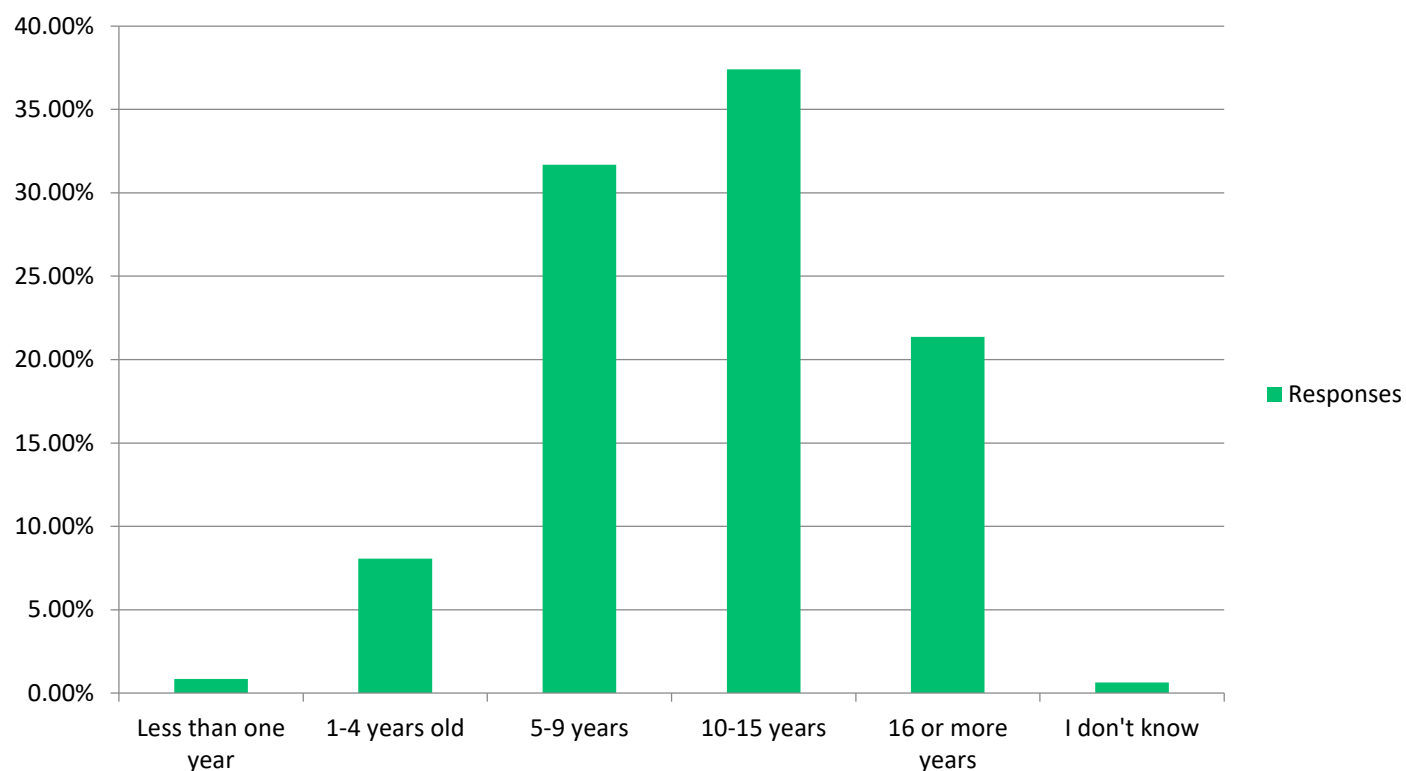
What size population does your department serve?

Answer Choices	Responses	
Less than 5,000	33.52%	474
5,001-50,000	50.35%	712
50,001-100,000	7.78%	110
100,001-500,000	4.46%	63
500,001-1,000,000	1.70%	24
More than 1,000,000	2.19%	31

Answered 1414

Skipped 0

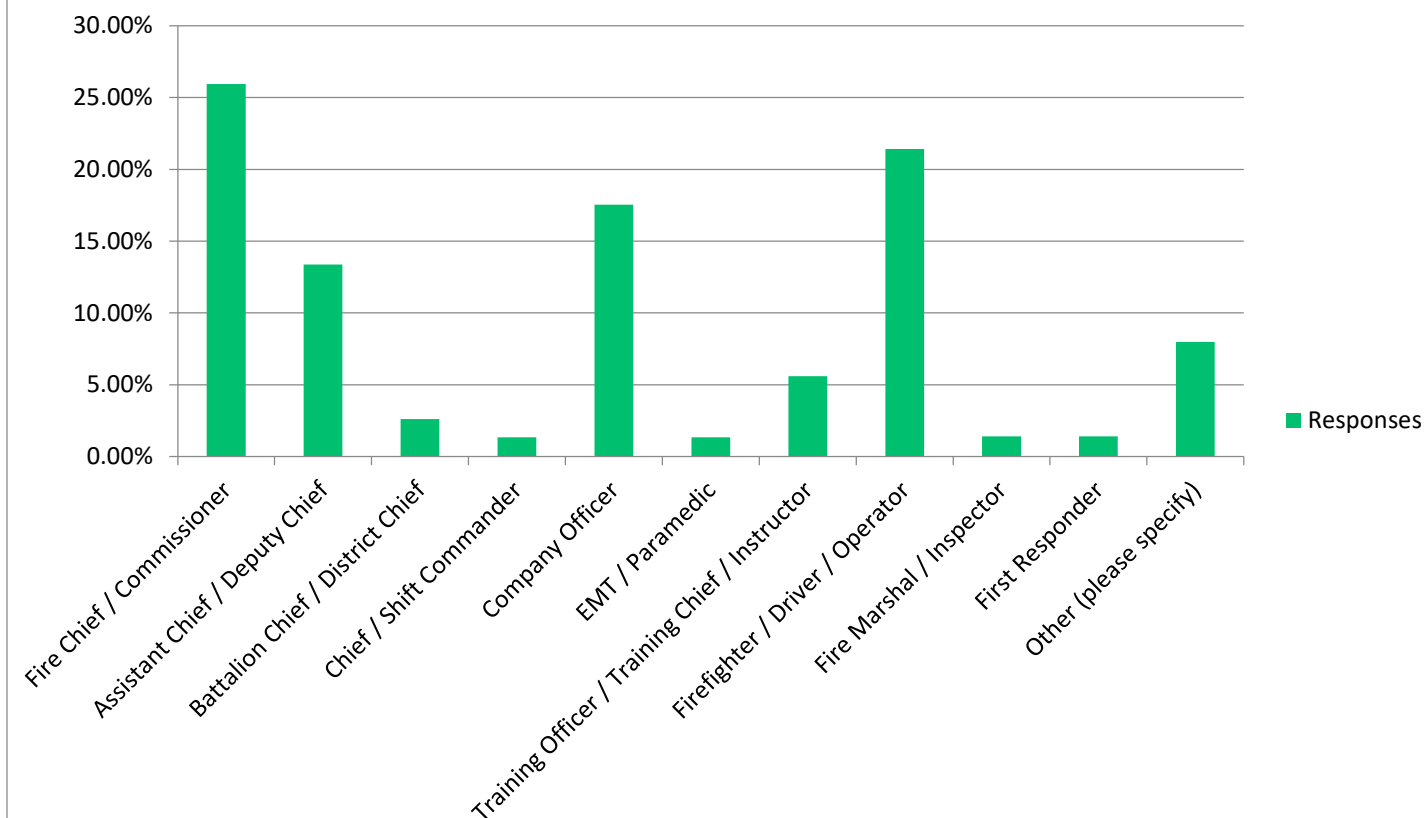
What is the average age of your front line apparatus?



What is the average age of your front line apparatus?

Answer Choices	Responses	
Less than one year	0.85%	12
1-4 years old	8.06%	114
5-9 years	31.68%	448
10-15 years	37.41%	529
16 or more years	21.36%	302
I don't know	0.64%	9
Answered		1414
Skipped		0

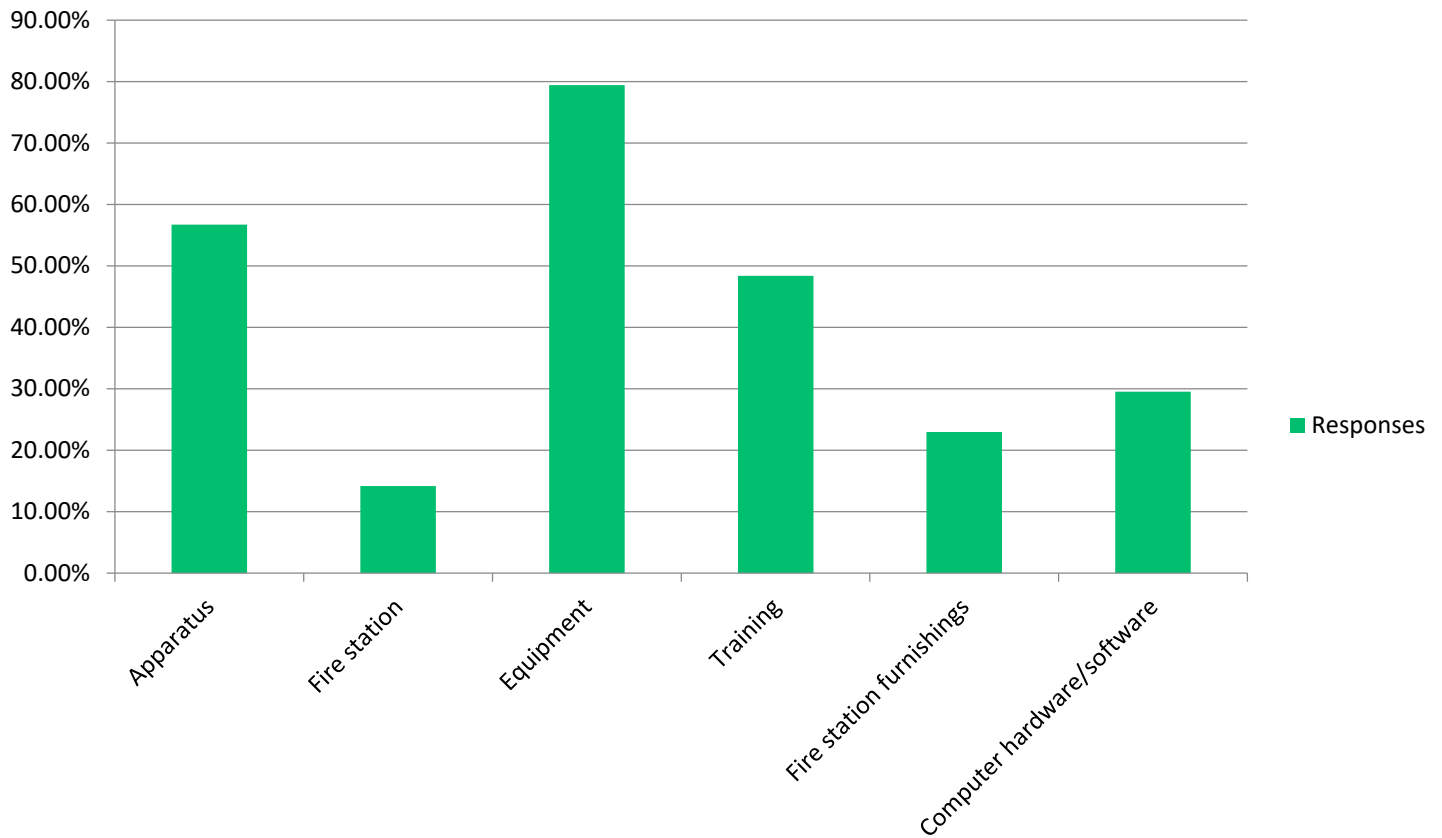
Please select your primary occupation / title.



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Answer Choices	Responses	
Fire Chief / Commissioner	25.95%	367
Assistant Chief / Deputy Chief	13.37%	189
Battalion Chief / District Chief	2.62%	37
Chief / Shift Commander	1.34%	19
Company Officer	17.54%	248
EMT / Paramedic	1.34%	19
Training Officer / Training Chief / Instructor	5.59%	79
Firefighter / Driver / Operator	21.43%	303
Fire Marshal / Inspector	1.41%	20
First Responder	1.41%	20
Other (please specify)	7.99%	113
Answered		1414
Skipped		0

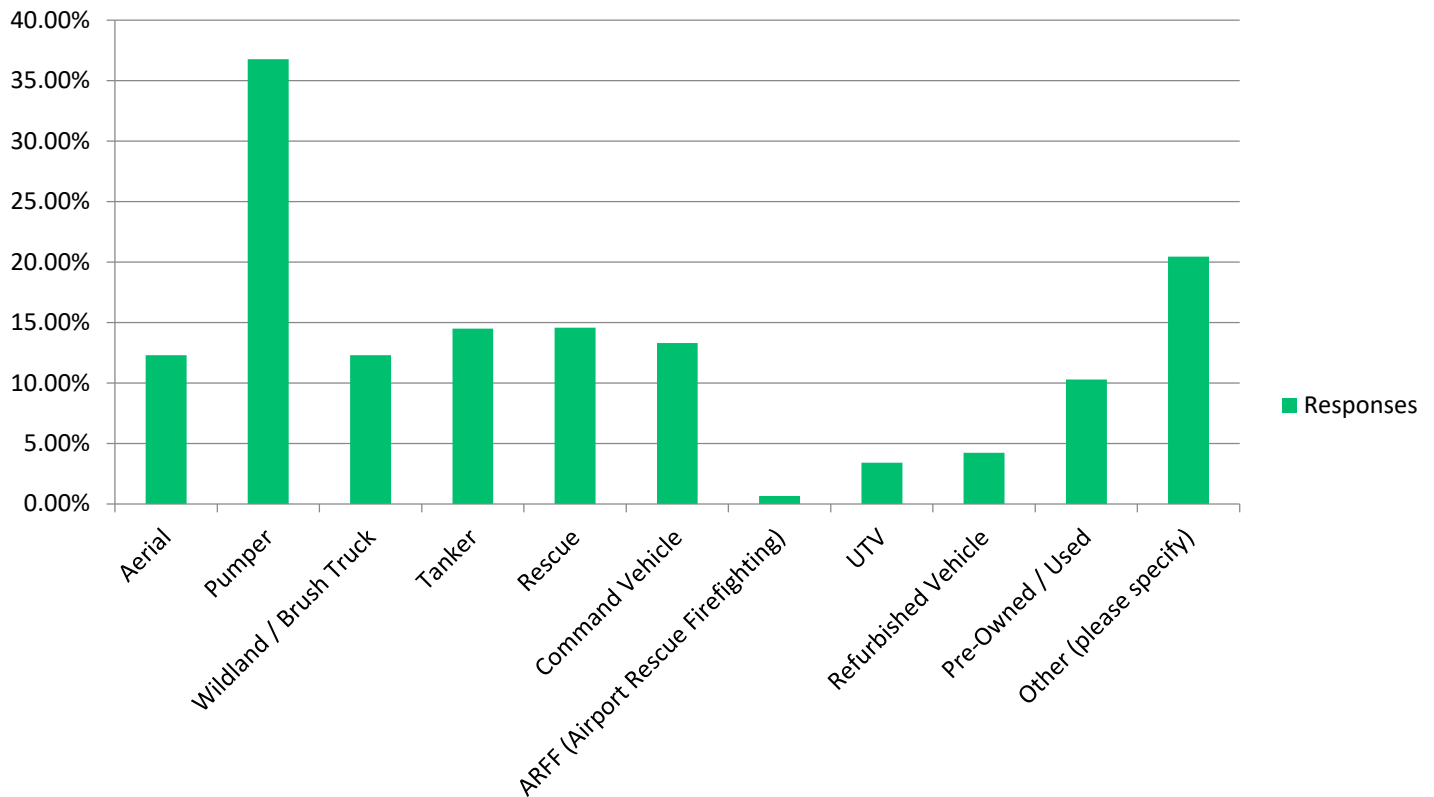
What do you anticipate purchasing in the next fiscal year? (Select all that apply.)



What do you anticipate purchasing in the next fiscal year? (Select all that apply.)

Answer Choices	Responses	
Apparatus	56.73%	691
Fire station	14.20%	173
Equipment	79.39%	967
Training	48.36%	589
Fire station furnishings	22.99%	280
Computer hardware/software	29.56%	360
Answered		1218
Skipped		196

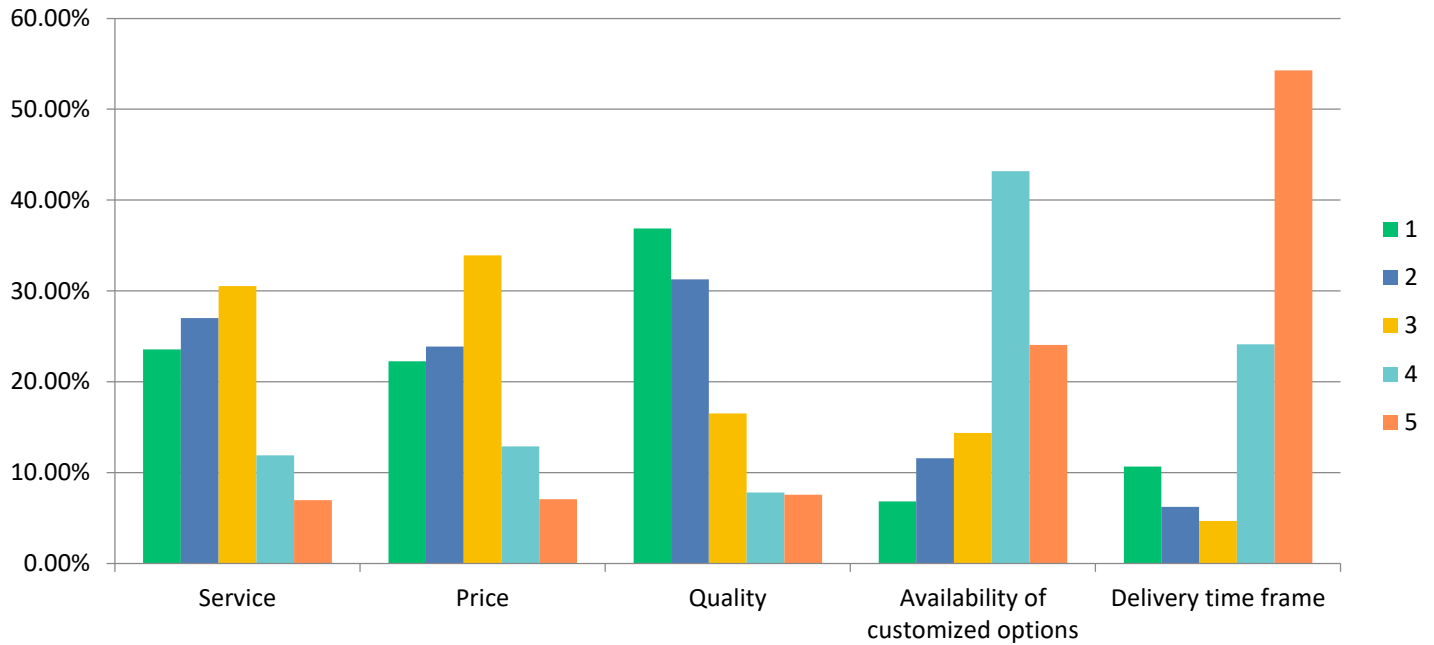
Which of the following apparatus do you anticipate purchasing in the next fiscal year?



Which of the following apparatus do you anticipate purchasing in the next fiscal year?

Answer Choices	Responses	
Aerial	12.28%	134
Pumper	36.76%	401
Wildland / Brush Truck	12.28%	134
Tanker	14.48%	158
Rescue	14.57%	159
Command Vehicle	13.29%	145
ARFF (Airport Rescue Firefighting)	0.64%	7
UTV	3.39%	37
Refurbished Vehicle	4.22%	46
Pre-Owned / Used	10.27%	112
Other (please specify)	20.44%	223
Answered		1091
Skipped		323

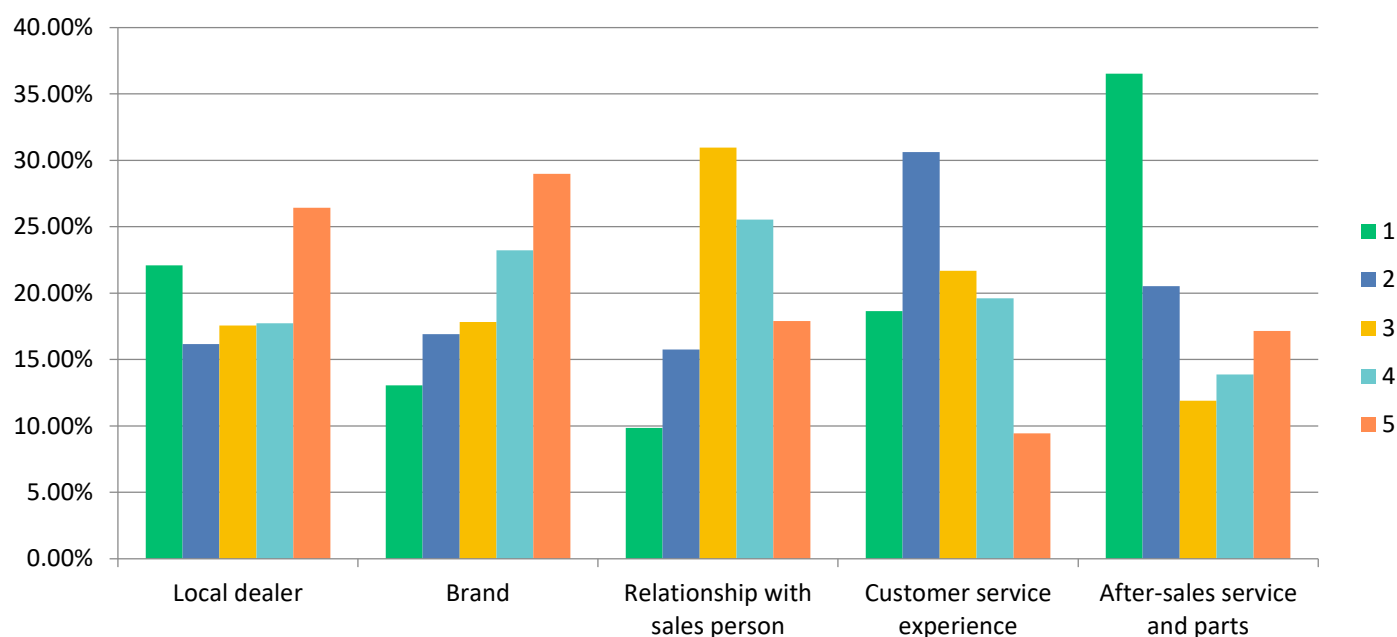
When purchasing a new piece of equipment, please rank how the following aspects relate to your brand loyalty, using 1 as the most important and 5 as the least important.



When purchasing a new piece of equipment, please rank how the following aspects relate to your brand loyalty, using 1 as the most important and 5 as the least important.

	1		2		3		4		5		Total
Service	23.56%	287	27.01%	329	30.54%	372	11.90%	145	6.98%	85	1218
Price	22.25%	271	23.89%	291	33.91%	413	12.89%	157	7.06%	86	1218
Quality	36.86%	449	31.28%	381	16.50%	201	7.80%	95	7.55%	92	1218
Availability of customized options	6.81%	83	11.58%	141	14.37%	175	43.19%	526	24.06%	293	1218
Delivery time frame	10.67%	130	6.24%	76	4.68%	57	24.14%	294	54.27%	661	1218
Answered										1218	
Skipped										196	

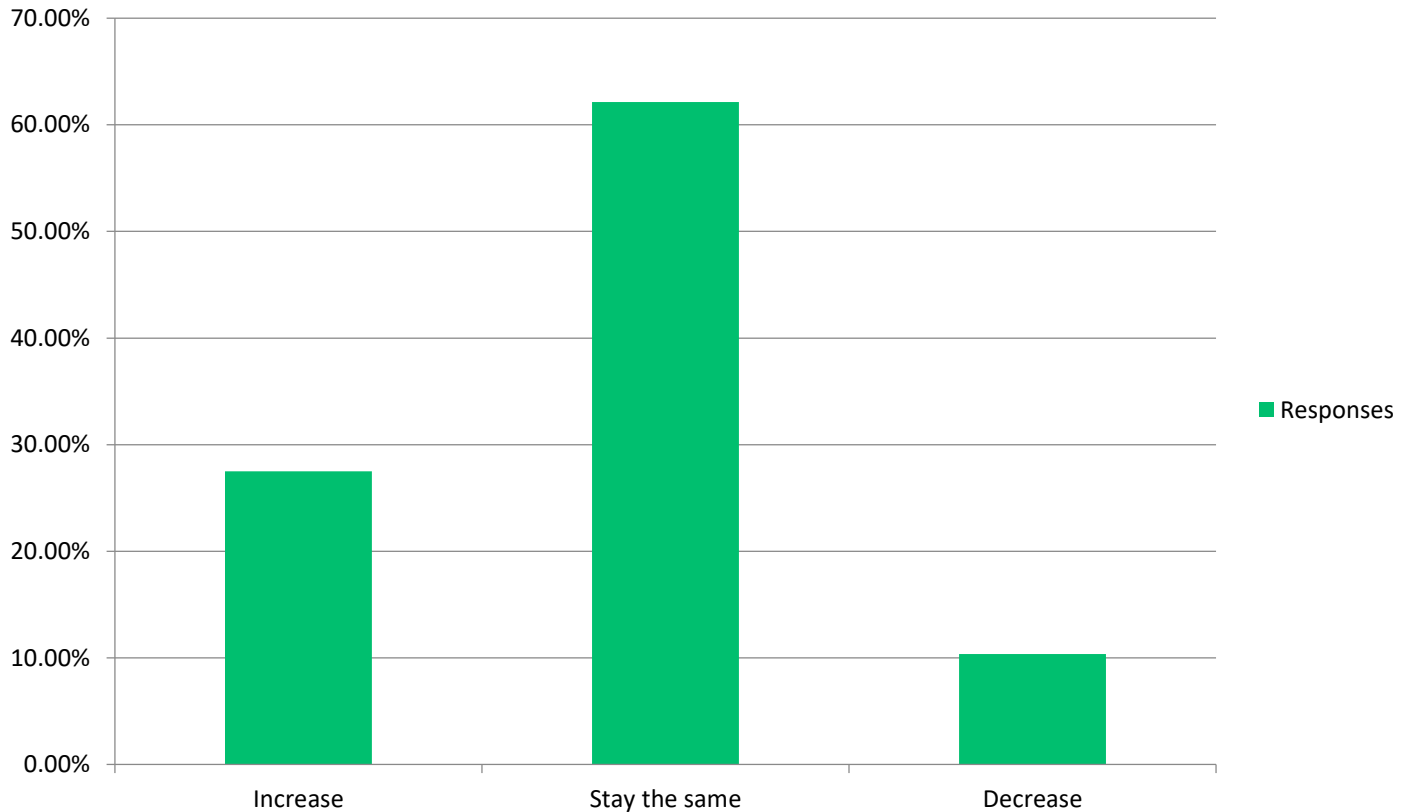
How important are the following service/manufacturer attributes in the purchase of new apparatus? Please rank the following attributes, using 1 as the most important and 5 as the least important.



How important are the following service/manufacturer attributes in the purchase of new apparatus? Please rank the following attributes, using 1 as the most important and 5 as the least important.

	1		2		3		4		5		Total
Local dealer	22.09%	269	16.17%	197	17.57%	214	17.73%	216	26.44%	322	1218
Brand	13.05%	159	16.91%	206	17.82%	217	23.23%	283	28.98%	353	1218
Relationship with sales person	9.85%	120	15.76%	192	30.95%	377	25.53%	311	17.90%	218	1218
Customer service experience	18.64%	227	30.62%	373	21.67%	264	19.62%	239	9.44%	115	1218
After-sales service and parts	36.54%	445	20.53%	250	11.90%	145	13.88%	169	17.16%	209	1218
	Answ										1218
	ered										196
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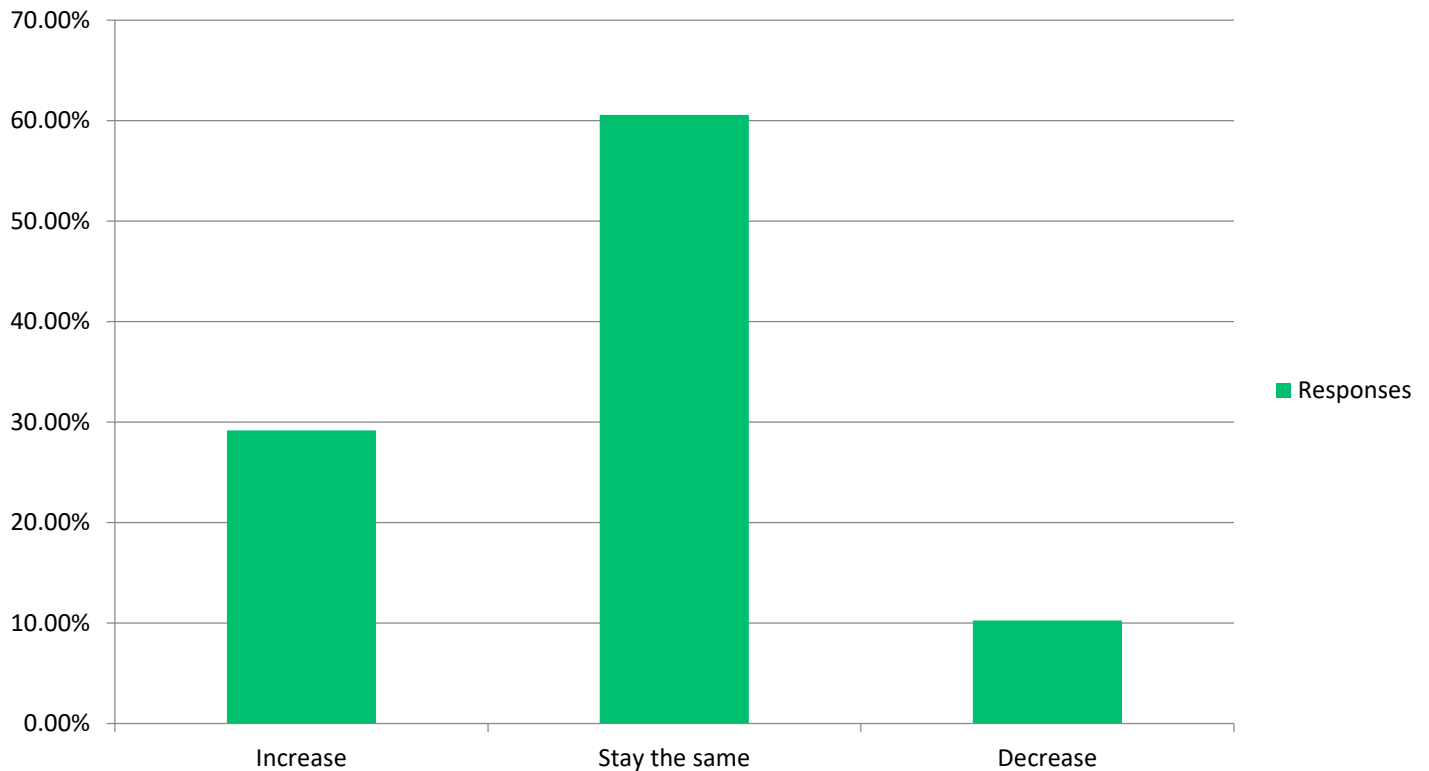
During the next two years (2018 and 2019), do you anticipate your apparatus budget will increase, stay the same, or decrease?



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Answer Choices		Responses	
Increase		27.51%	332
Stay the same		62.14%	750
Decrease		10.36%	125
Answered			1207
Skipped			207

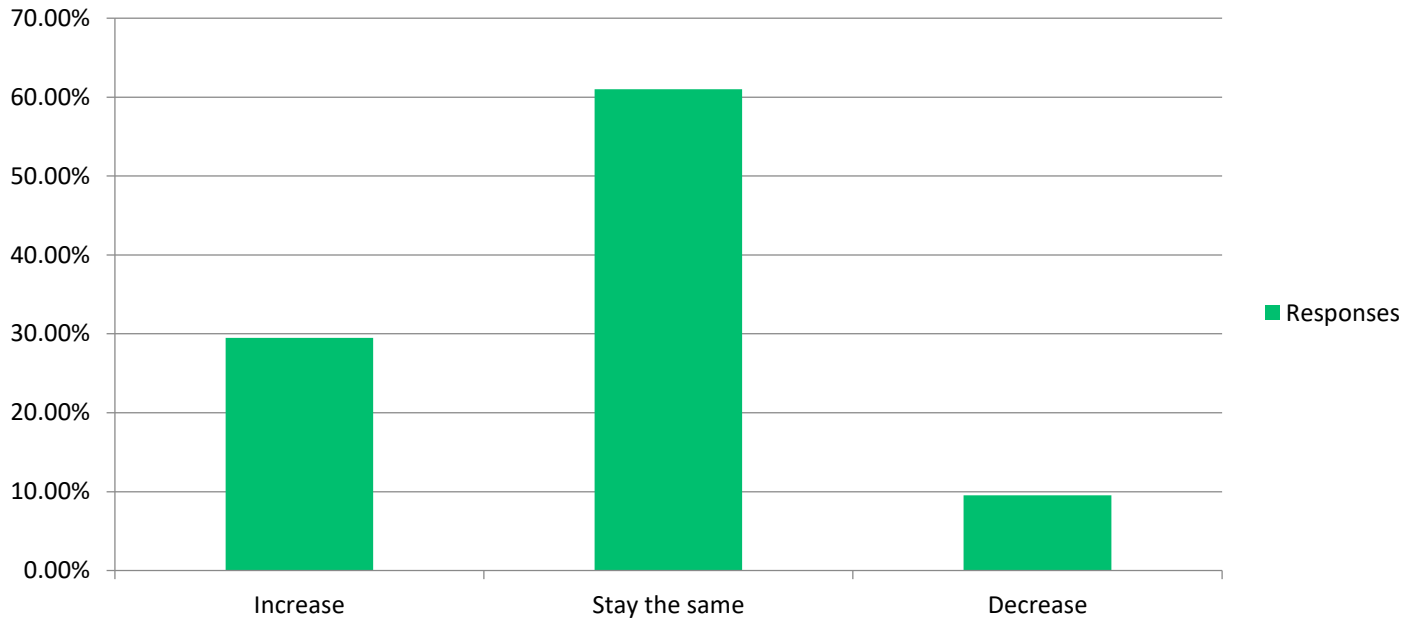
During the next two years (2018 and 2019), how do you expect your staffing level to change?



During the next two years (2018 and 2019), how do you expect your staffing level to change?

Answer Choices	Responses	
Increase	29.16%	352
Stay the same	60.56%	731
Decrease	10.27%	124
Answered		1207
Skipped		207

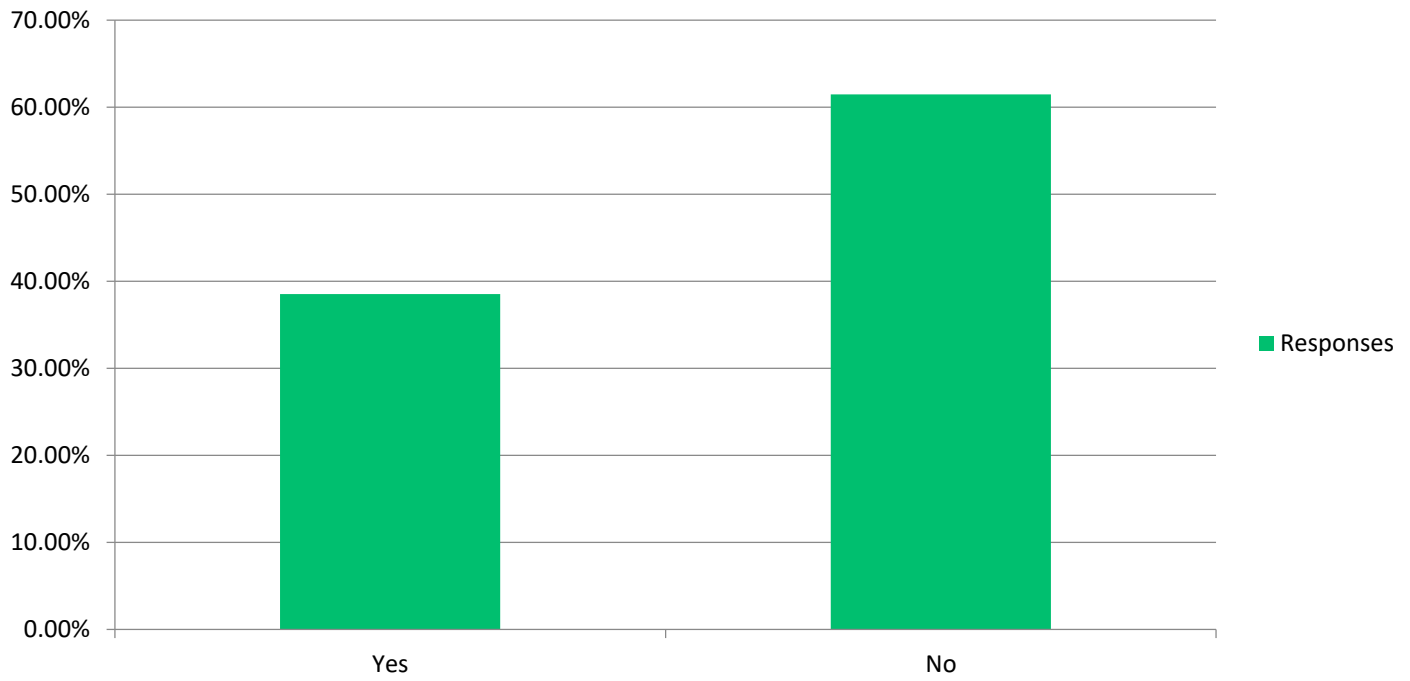
Exclusive of capital purchases such as apparatus, how do you expect your equipment budget to change over the next two years (2018 and 2019)?



Exclusive of capital purchases such as apparatus, how do you expect your equipment budget to change over the next two years (2018 and 2019)?

Answer Choices	Responses	
Increase	29.49%	356
Stay the same	60.98%	736
Decrease	9.53%	115
Answered		1207
Skipped		207

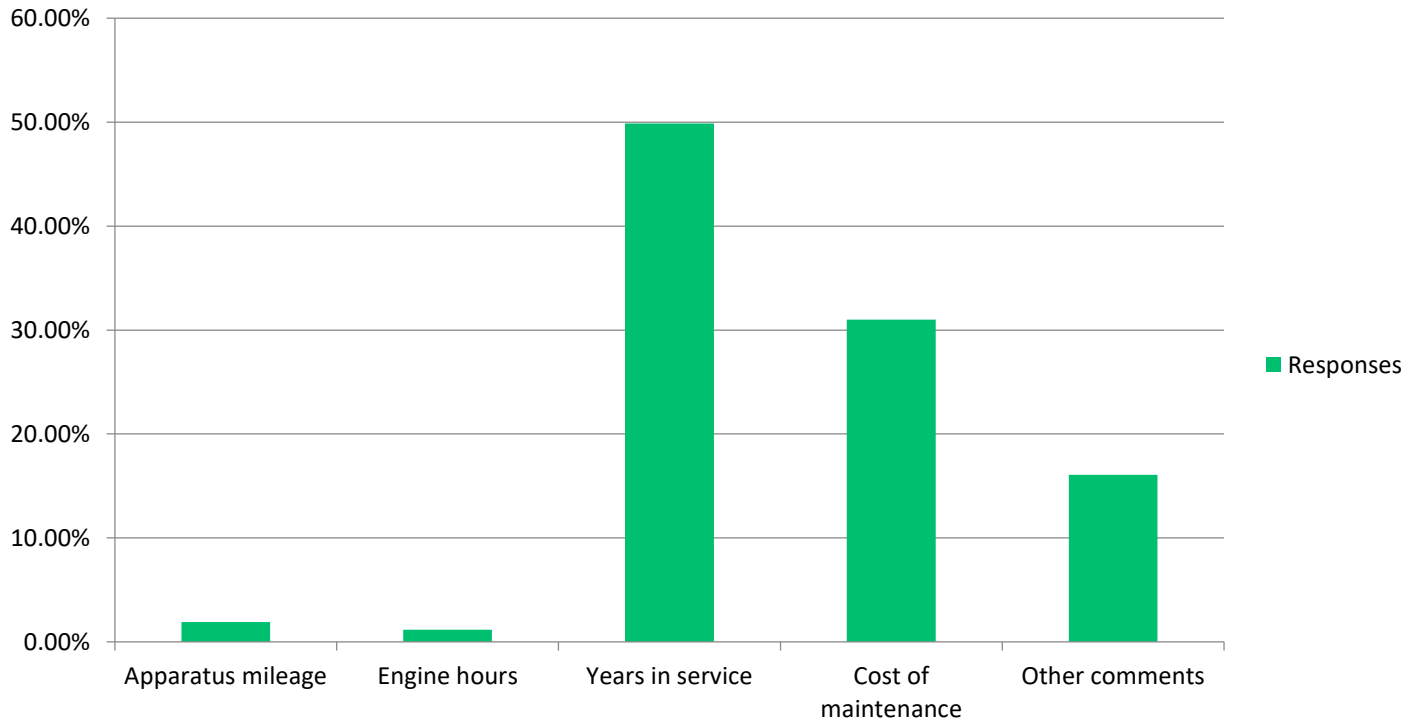
Does your fire department have a formal or written apparatus replacement plan or process?



Does your fire department have a formal or written apparatus replacement plan or process?

Answer Choices		Responses	
Yes		38.53%	465
No		61.47%	742
Answered			1207
Skipped			207

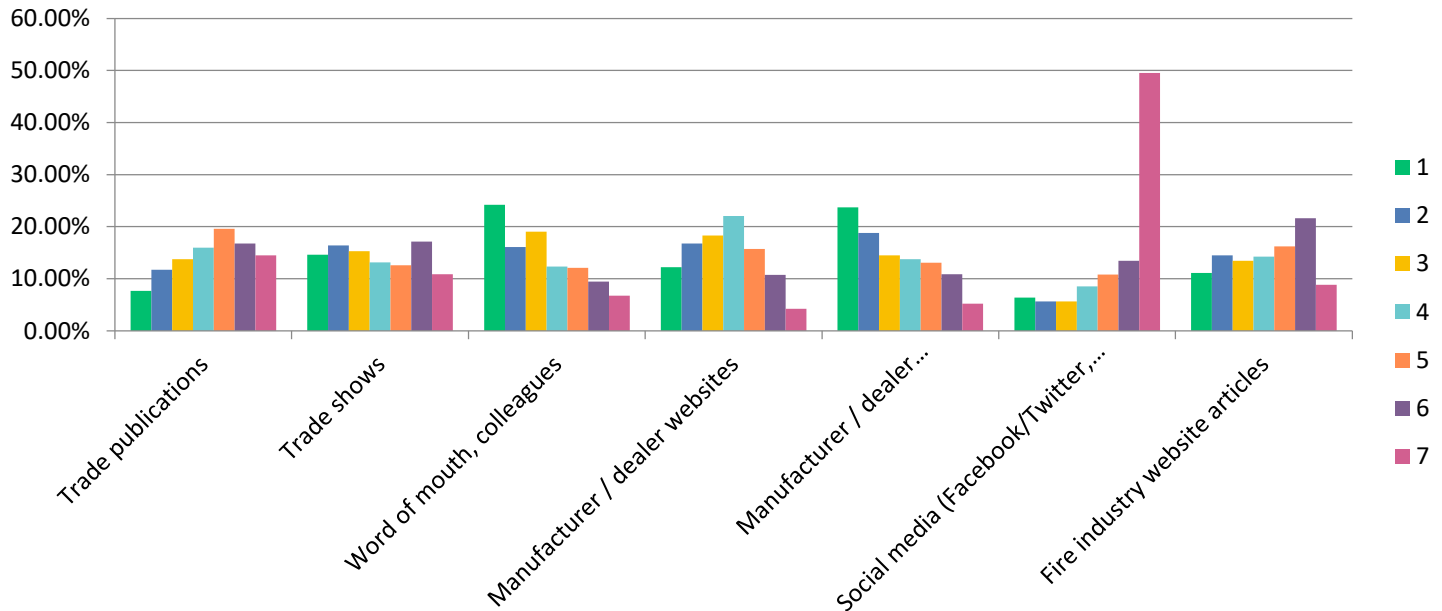
How does your department determine an apparatus is ready for replacement? (Please provide details in the comment section)



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Answer Choices	Responses	
Apparatus mileage	1.91%	23
Engine hours	1.16%	14
Years in service	49.88%	602
Cost of maintenance	30.99%	374
Other comments	16.07%	194
Answered		1207
Skipped		207

Using 1 as the most important and 7 as the least important, please rank the importance of each of the following when seeking information on apparatus and equipment.



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	1		2		3		4		5		6		7		Total		
Trade publications	7.68%	91	11.73%	139	13.76%	163	15.95%	189	19.58%	232	16.79%	199	14.51%	172	1185		
Trade shows	14.60%	173	16.37%	194	15.27%	181	13.16%	156	12.57%	149	17.13%	203	10.89%	129	1185		
Word of mouth, colleagues	24.22%	287	16.12%	191	19.07%	226	12.32%	146	12.07%	143	9.45%	112	6.75%	80	1185		
Manufacturer / dealer websites	12.24%	145	16.79%	199	18.31%	217	22.03%	261	15.70%	186	10.72%	127	4.22%	50	1185		
Manufacturer / dealer salespersons	23.71%	281	18.82%	223	14.51%	172	13.76%	163	13.08%	155	10.89%	129	5.23%	62	1185		
Social media (Facebook/Twitter, etc.)	6.41%	76	5.65%	67	5.65%	67	8.52%	101	10.80%	128	13.42%	159	49.54%	587	1185		
Fire industry website articles	11.14%	132	14.51%	172	13.42%	159	14.26%	169	16.20%	192	21.60%	256	8.86%	105	1185		
														Answered	1185		
														Skipped	229		