Fire Industry Association

Leading Excellence in Fire Since 1916

Market Conditions Review

WAVE 13

Market Conditions Review

Needless to say, 2021 has been an interesting year for both better and worse. It has been punctuated by the continued adaptation to the unprecedented Covid-19 pandemic. In spite of the pandemic, key industry issues have remained at the forefront of our industry. Ensuring our industry is able to put its best foot forward in a post Brexit world; alongside our continued effort to successfully respond to the Grenfell Tower tragedy have been of paramount importance to both the FIA and the wider fire industry. This Market Conditions Survey has found over the last 12 months that the fire industry continues to thrive throughout the multitude of challenges it has been forced to overcome.

This concept of building on the progress that has come despite hardship, is evident as we observed 66% of non-member respondents had the same or slightly more enquiries that the previous 12 months with 75% having the same or slightly more orders. Growth was also evident for members with 57% of respondents reporting slightly more or substantially more enquiries and orders. These positive figures point towards both the imperative need for fire professionals as well as sustainable growth in the industry.

In addition to sustainable increases in enquiries and orders, 25% of Non-member respondents continued to recruit skilled labour enhancing the abilities and knowledge of their workforce. Furthermore, this year seen 0% of Non-member respondents losing any skilled labour, these figures are somewhat surprising given the financial hardships the pandemic has imposed. Sustainable increases in skilled labour were also evident for members; 39% of our members reported recruitment of skilled labour with just 5% reporting they had shed skilled workers. While there has ultimately been a slight decline in recruitment of skilled labour in comparison to previous years, there has also been a reduction in shedding of skilled workers. With a substantial number of respondents stating there has been no change in their skilled workforce, the reported figures for 2021 could signal an increase in job security in spite of the economic hardships caused by the pandemic. This is extremely positive news for the fire industry that could be down to a number of factors, notably, the invaluable work fire professionals do in ensuring both life and property safety. Pandemic or not, fire professionals will always be required.

As the restrictions of the pandemic continue to loosen its grip on how businesses nationwide operate, the fire industry like numerous others, has seen a slow return to the office for its workforce. Our survey reports that both flexible (58%) and remote (37%) working have reduced as a priority in the fire industry over the last year. While this is still substantially higher than pre-pandemic figures, it could indicate that there has been a gradual return to a traditional office environment for some, reducing the priority of reviewing where employees work from. Moreover, in last year's report, we at the FIA stated that flexible and remote working would not just be short-term solutions to the pandemic, but perhaps the new normal for the way some professionals can work. This year's figures further support this. The technological advancements that have developed as a result of the pandemic, such as virtual meetings and remote working, have enabled companies to become more efficient.

Online meetings are here to stay and with remote working enabling many individuals to perform their roles to the required standard whether they are in or away from the office, it is highly unlikely we will see a return to pre-pandemic figures on flexible and remote working.

Here at the FIA, the training of fire professionals is imperative to what we do. We have seen a further increase in the number of respondents looking to prioritise upskill and/or reskill (42%) their workforce. In addition to this, we have seen a 3% increase in the number of respondents looking to cross-train their workforce. These increases indicate a continued drive in the fire industry to be constantly growing knowledge in order to operate to the highest possible standards. Furthermore, these figures coincide with the already discussed figures on the recruitment of skilled workers. As previously stated, a substantial number of respondents reported no change in skilled labour employment. When combined with the increasing priority of upskilling staff could further suggest that there is a high level of job security within the industry. Businesses would rather up/reskill employees than lose existing employees and then have to recruit. In addition to this, the reported figures on cross-training indicate a continued increase in businesses within the fire industry seeking to change the way their staff operate; evolving from specialised niche roles to employees being capable of completing a variety of tasks enabling the business to become more efficient.

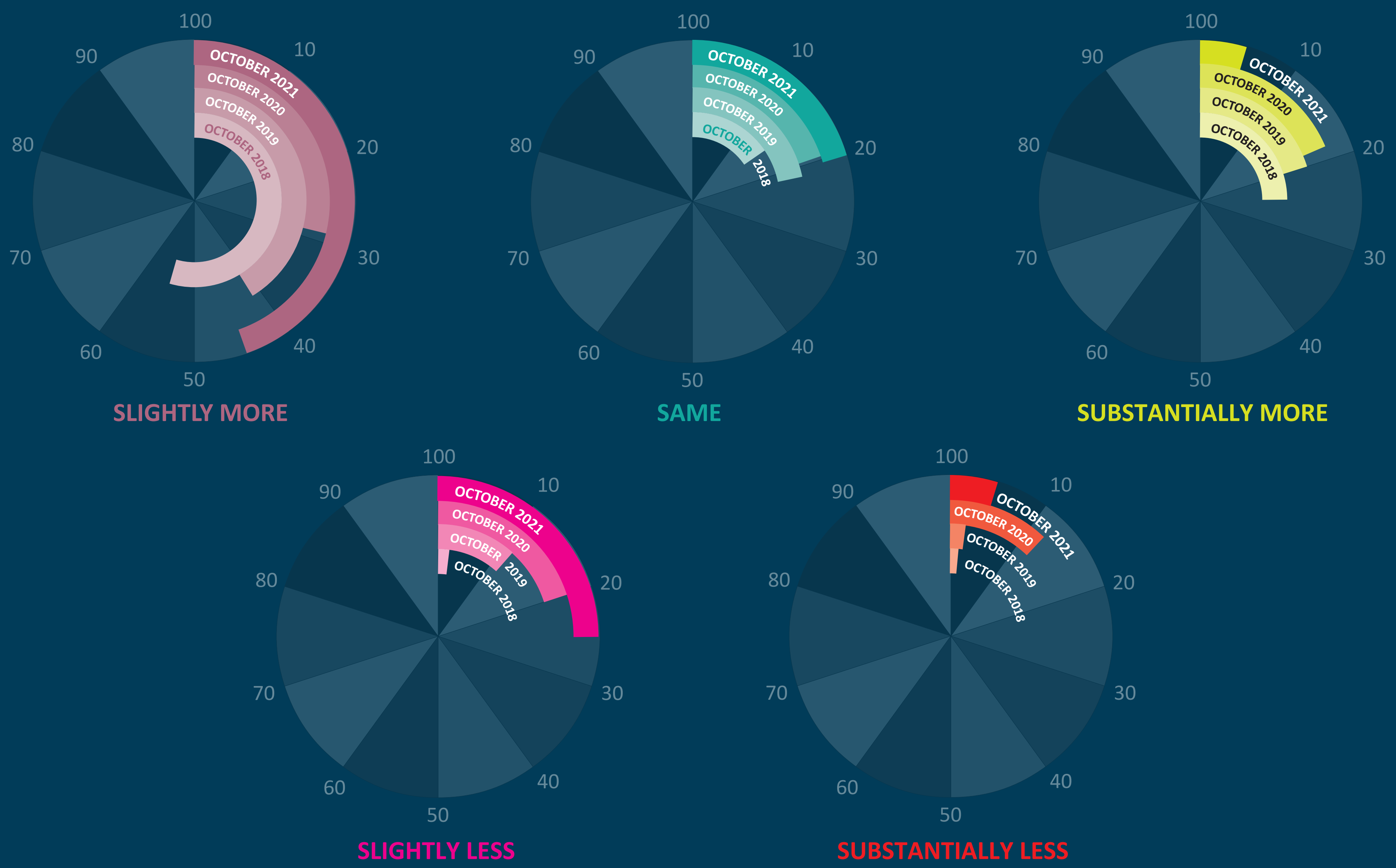
Over the last 12 months, businesses in the fire industry have continued to view training their workforce as pivotal. Despite the percentage of respondents who have increased training reducing from 55% to 25%, those who have kept training at the same level have increased significantly to 66%; a 27% increase on the previous year. In addition to this, respondents who have decreased training remained at 8%. Training's invaluable role in the fire industry is further evident when observing whether respondents intend to increase or decrease training of their workforce over the next 12 months, with 36% of respondents looking to increase training, and 65% looking to continue at their current levels. Furthermore, 0% of respondents are looking to decrease the amount of training their workforce completes over the next year. Away from this survey, FIA training statistics suggest that the hybrid approach we have taken in providing both online and in classroom training for our delegates has aided the industry and enables continued growth in knowledge and competency. In the last 12 months we have provided training for 2879 delegates with over 1500 of them enrolling for a qualification. These figures make evident the fact that training in the fire industry is vital to success, our industry demands competency and knowledge in order to continue to sustainably grow and develop.

Following on from last year's report, respondents who estimated the impact of Covid-19 on their financial performance to be high, further reduced from 23% to 17%. In last year's report we stated that more businesses are seeing COVID-19 as a low to moderate financial threat, this year's figures suggest that the majority now deem the financial impact of Covid-19 to be of low impact (55%). There are a number of reasons that the estimated financial impact of Covid-19 has fallen, notably the continued need for fire professionals to persistently perform their critical work in order to ensure both life and property safety. It is important to state that the FIA successfully lobbied the government in order to secure key worker status for fire professionals. This ensured that businesses were still able to operate, limiting Covid-19's financial impact.

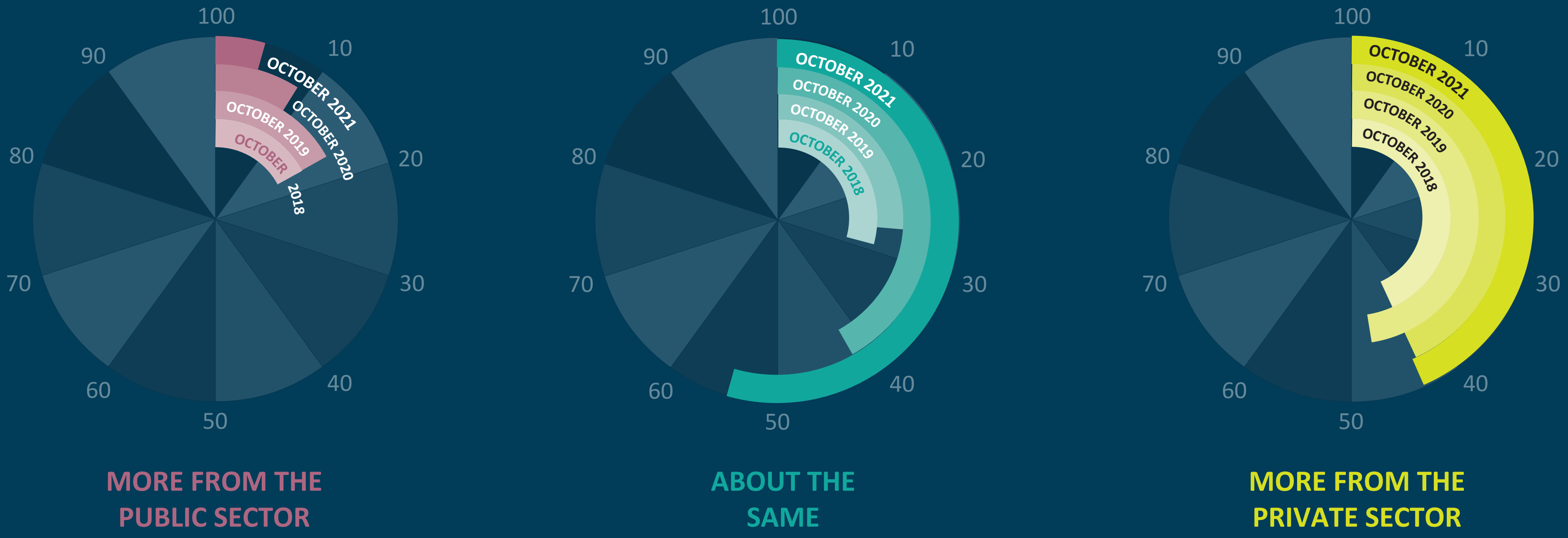
For FIA exporters business growth remained stable, 80% of respondents reported their business growth remained at the same rate with 14% reporting slightly more growth. Notably, 0% of respondents reported a fall in growth. These figures are impressive when considering the prevalent issues of a global pandemic and Brexit which have had to be dealt with. It is likely they will have to be dealt with for the foreseeable future - although hopefully to a lesser degree. Through our strong working relationship with several government departments, we at the FIA have been and will continue to be, well-positioned to relay vital information to both our members and the wider fire industry.

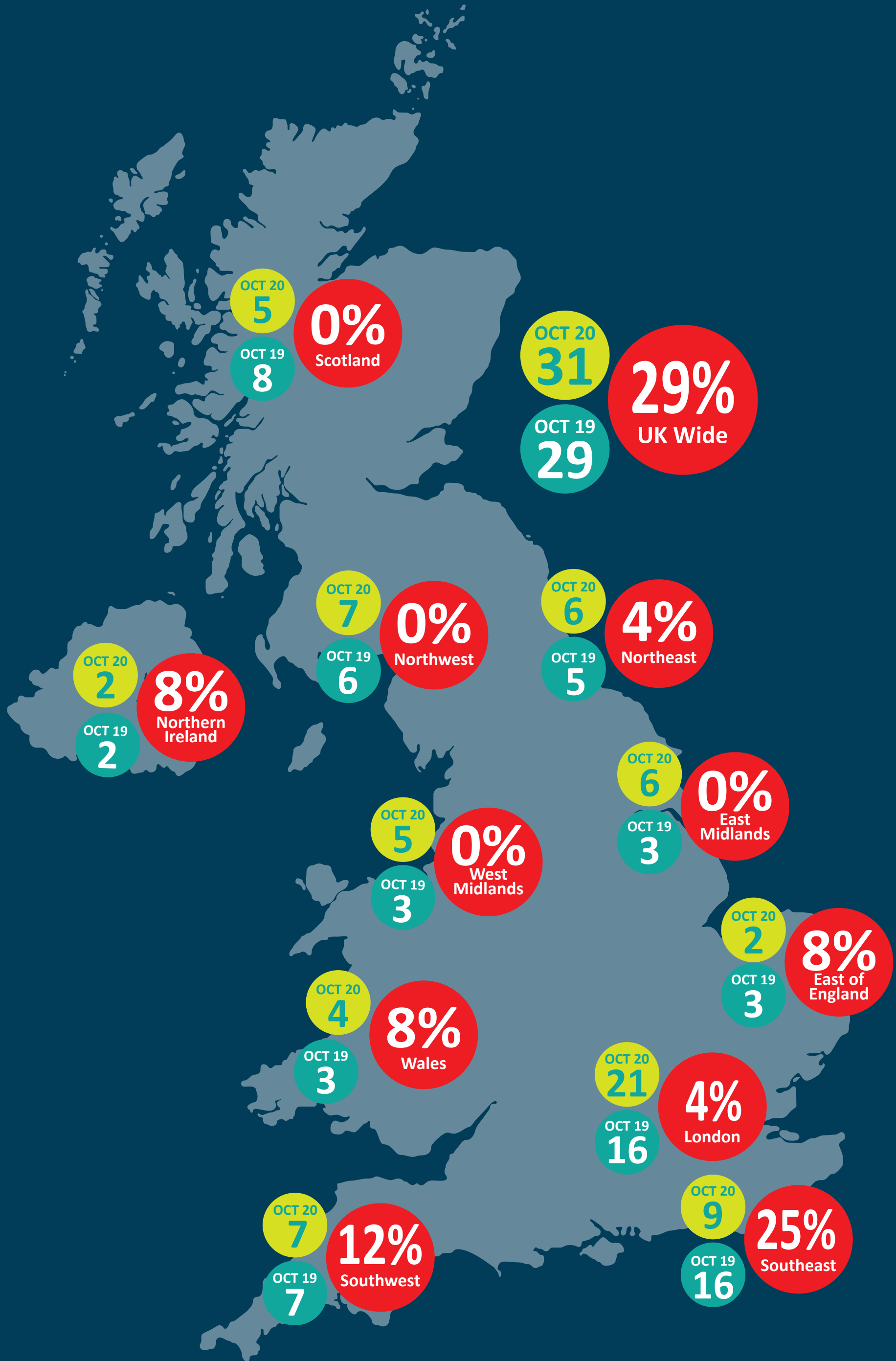
2021 followed in the footsteps of last year providing a diverse range of obstacles for the fire industry. This Market Conditions Survey, when combined with our Annual Report has once again found that our resilient industry has continued to not only overcome the challenges we have faced, but grown and developed in a sustainable fashion. We look forward to working with both members and non-members to make our industry stronger, safer and more efficient through our Building Safety Information Portal, Internet of Things Forum and our numerous councils.

Have you received more enquiries in the last 12 months than in the previous year? (%)



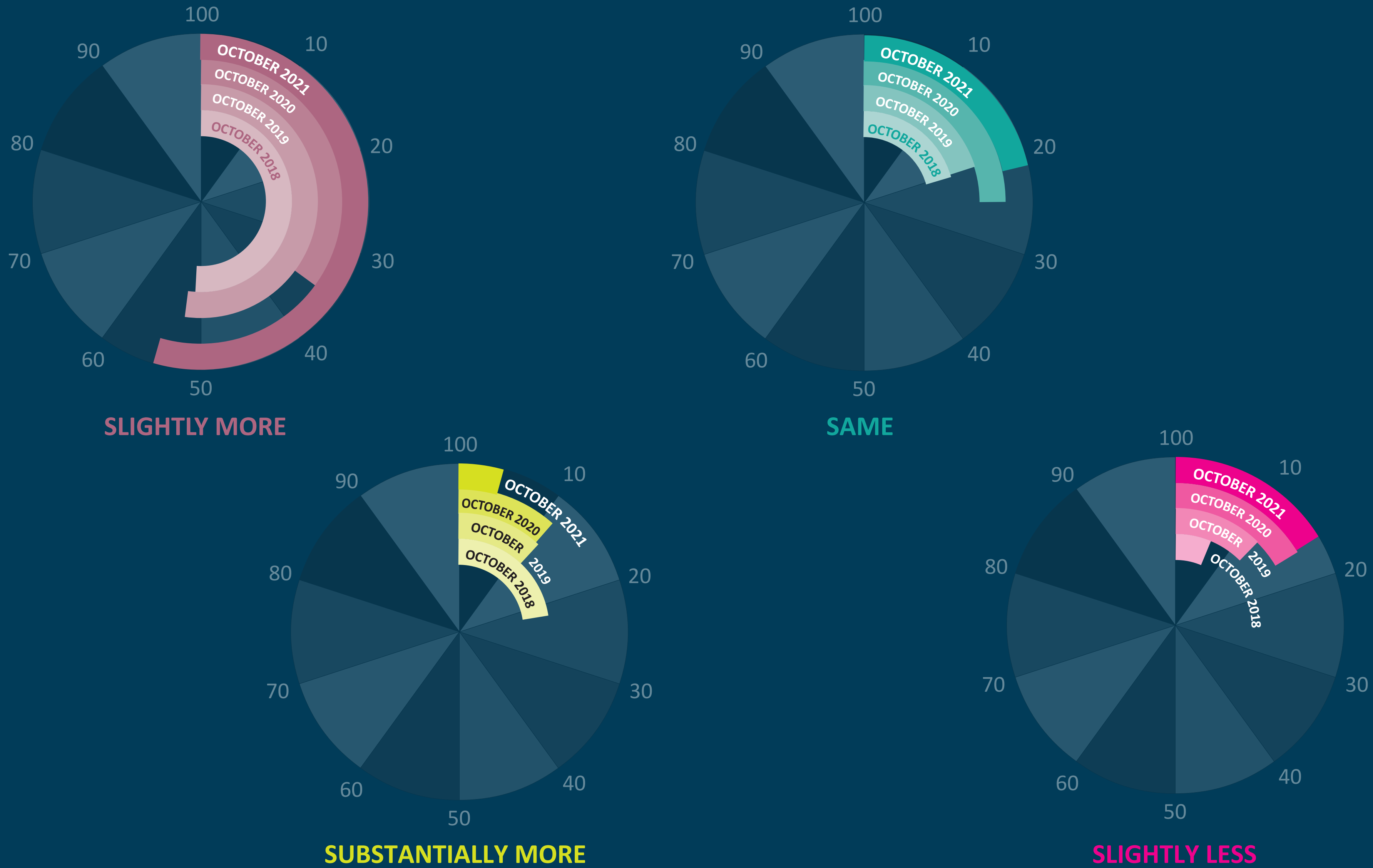
Have you had more enquiries from the Public or Private Sector? (%)



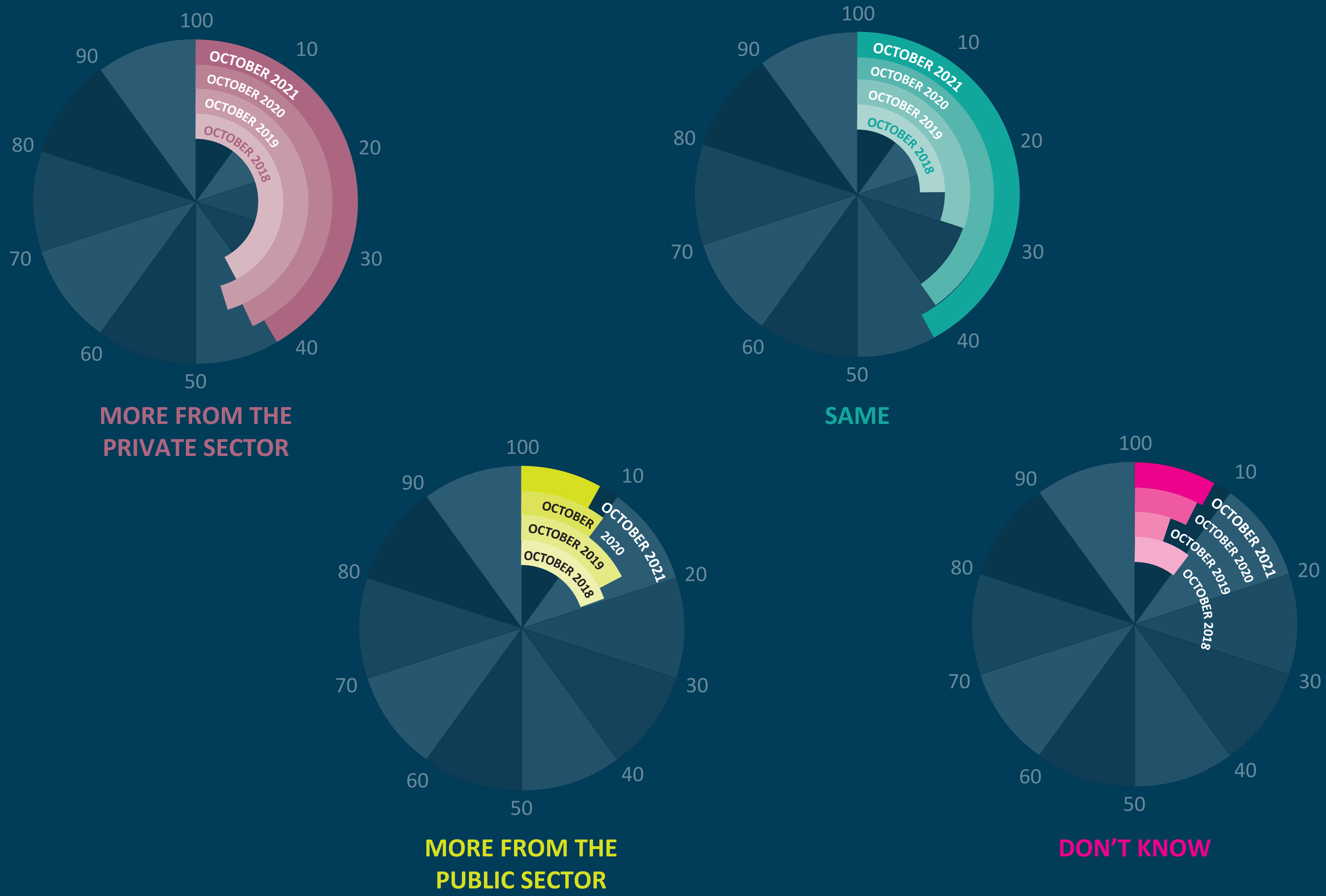


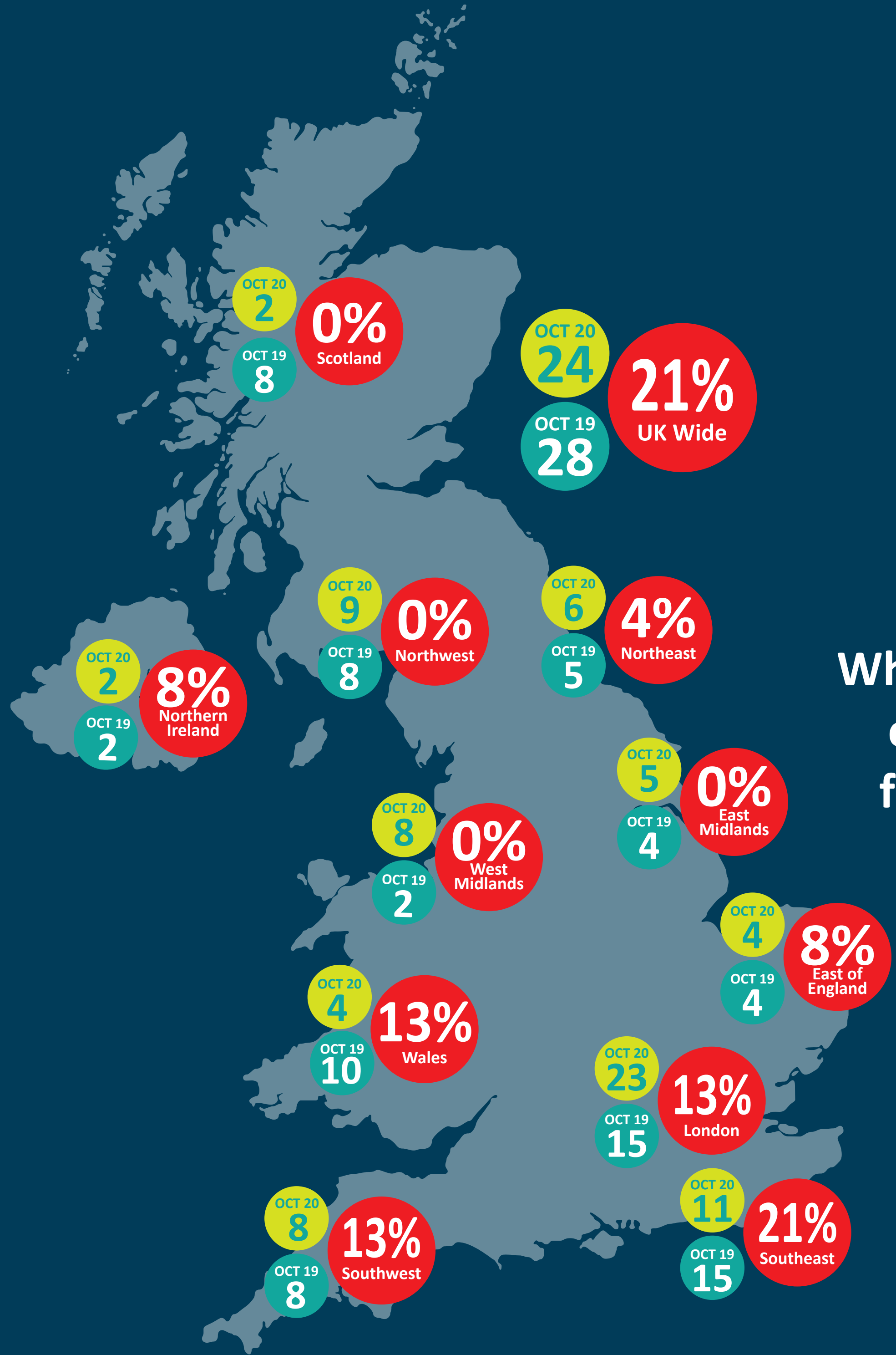
Where have the majority of your enquiries come from geographically?

Have you received more orders in the last 12 months than in the previous year? (%)



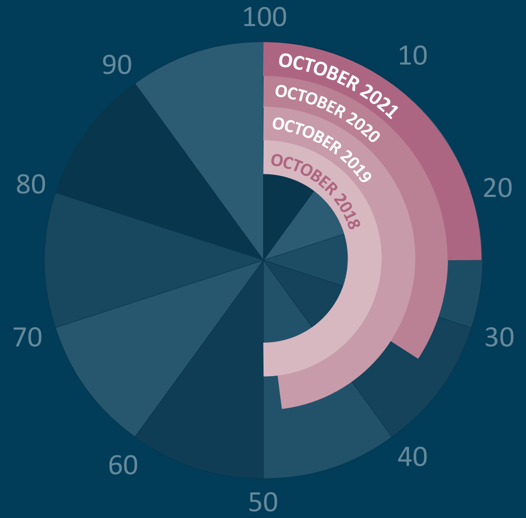
Have you had more orders from the Public or Private Sector? (%)



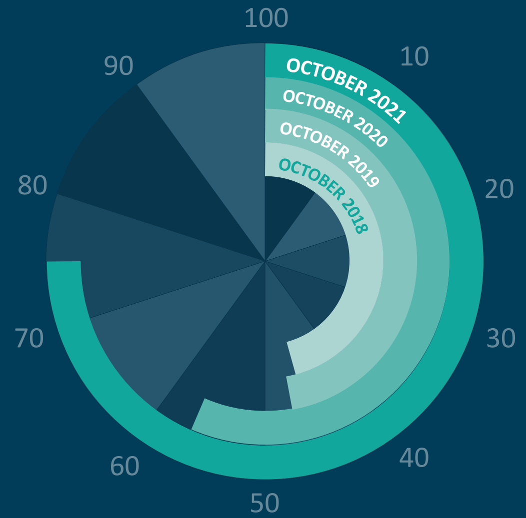


Where have the majority of your orders come from geographically?

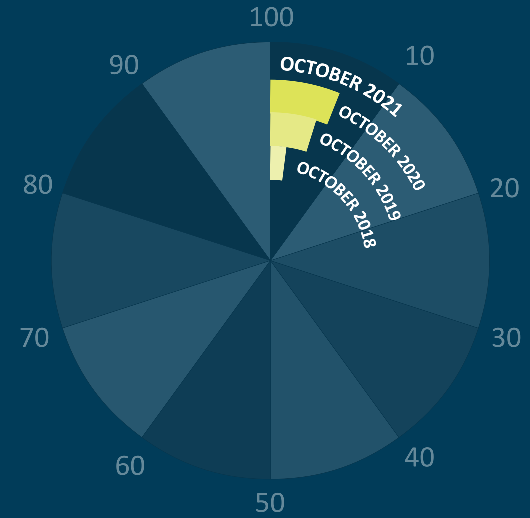
Have you recruited skilled labour in the last 12 months or have you shed skilled labour in the last year? (%)



RECRUITED SKILLED LABOUR

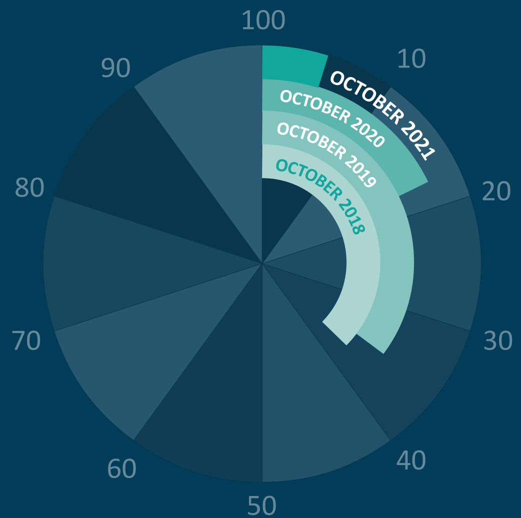


NO CHANGE

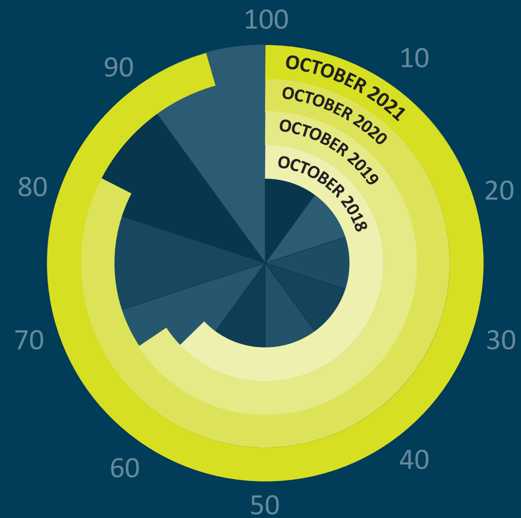


SHED SKILLED LABOUR

Have you recruited apprentices in the last 12 months? (%)

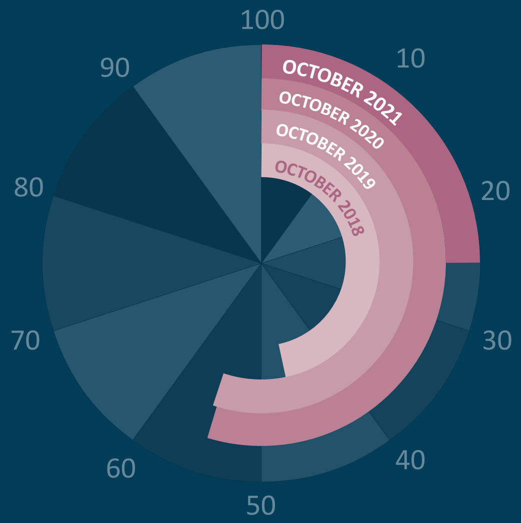


YES

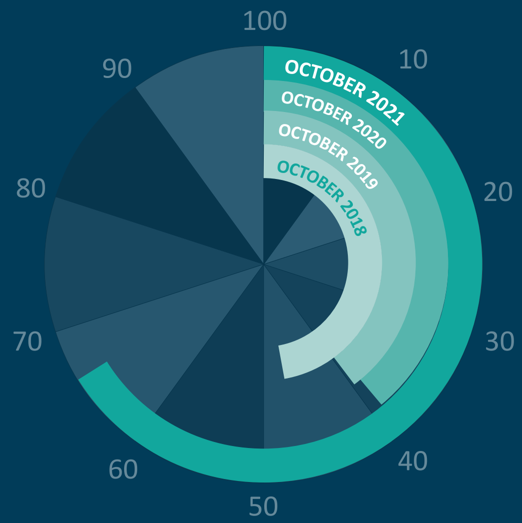


NO

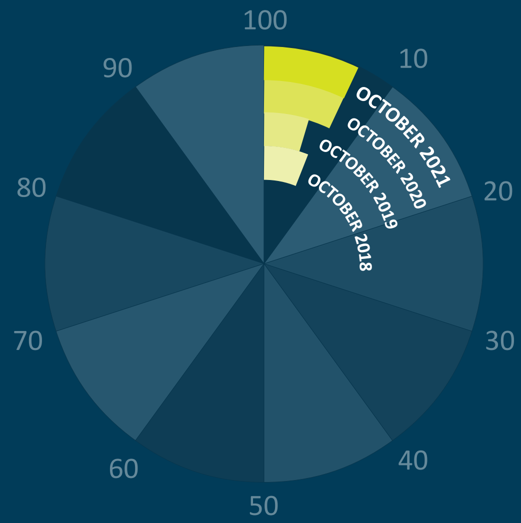
Have you increased or decreased the amount of training for your workforce in the last 12 months? (%)



INCREASE

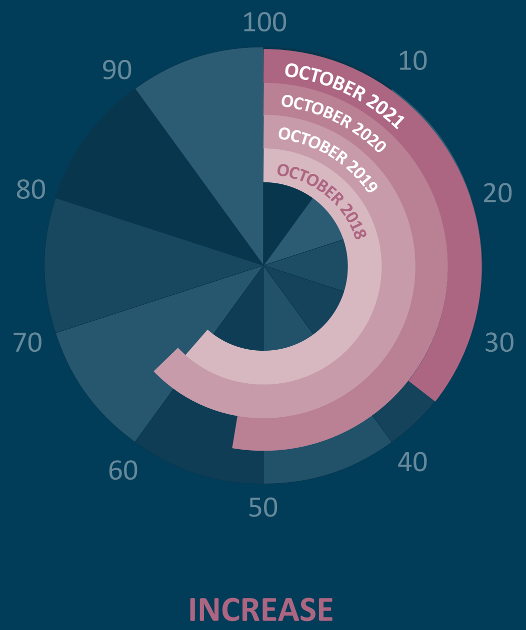


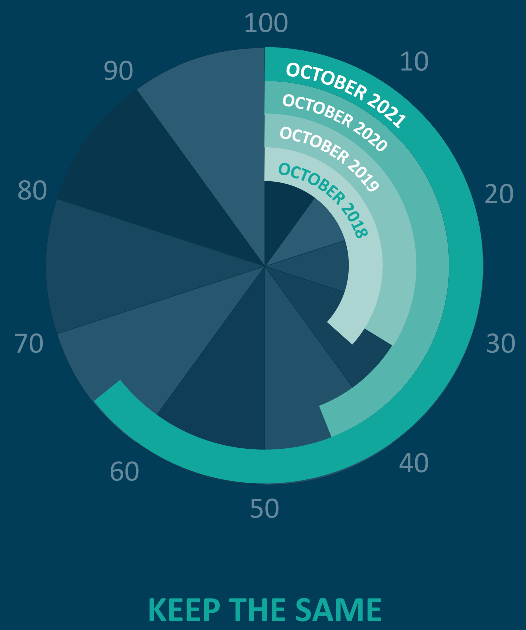
KEEP THE SAME

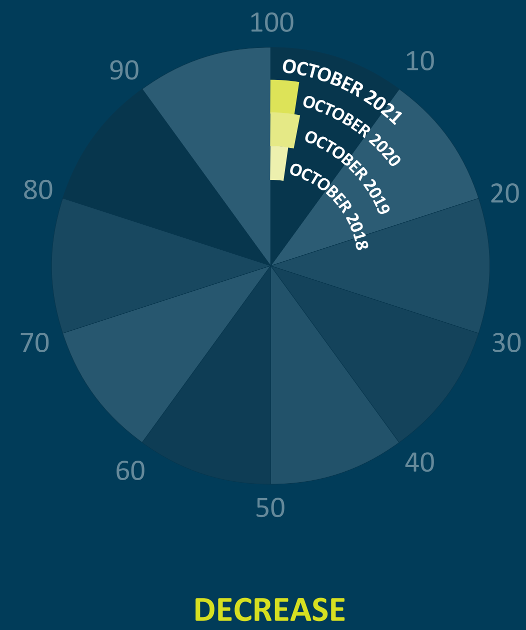


DECREASE

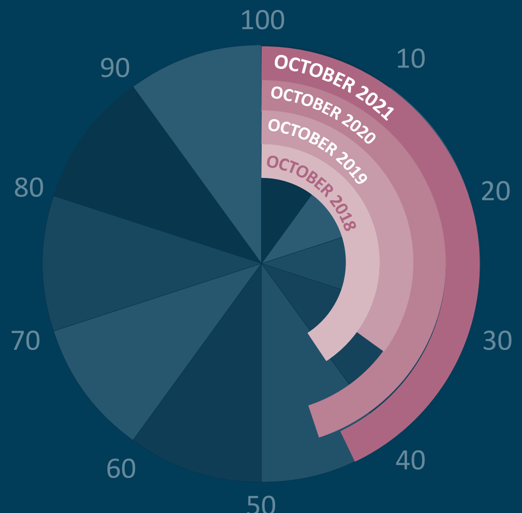
Do you intend to increase or decrease the amount of training for your workforce in the next 12 months? (%)



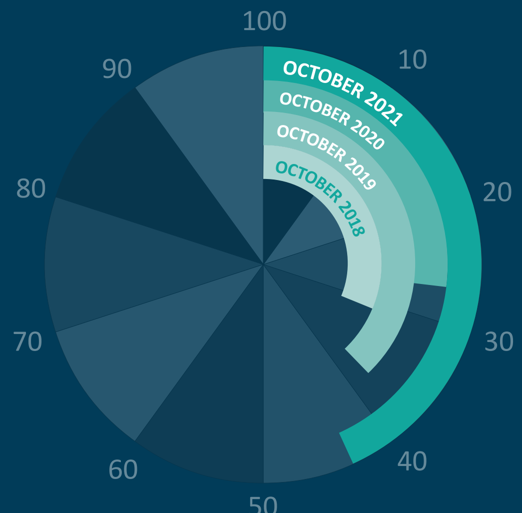




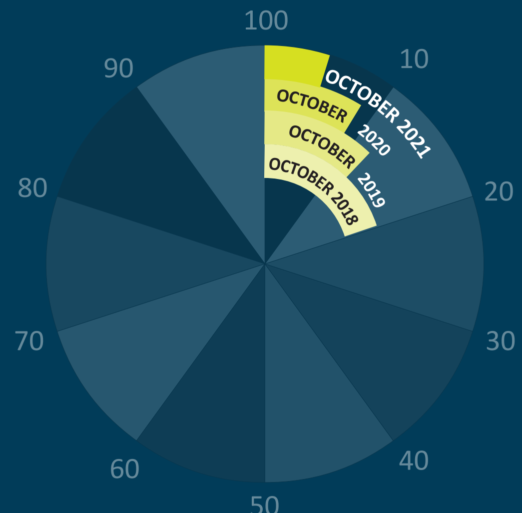
Have you received more or less invitations to tender for work in the last 12 months when compared to the previous year? (%)



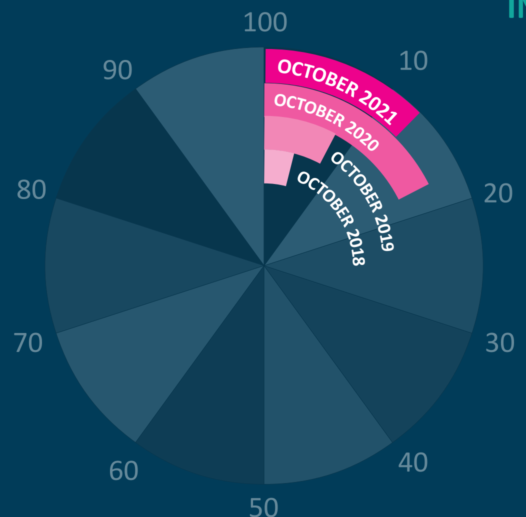
NO CHANGE



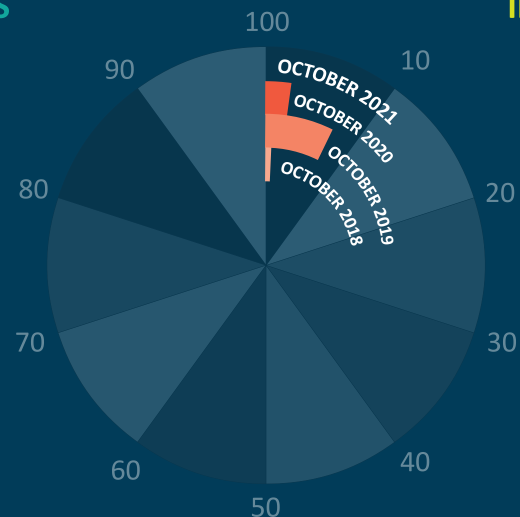
SLIGHTLY MORE INVITATIONS



A LOT MORE INVITATIONS

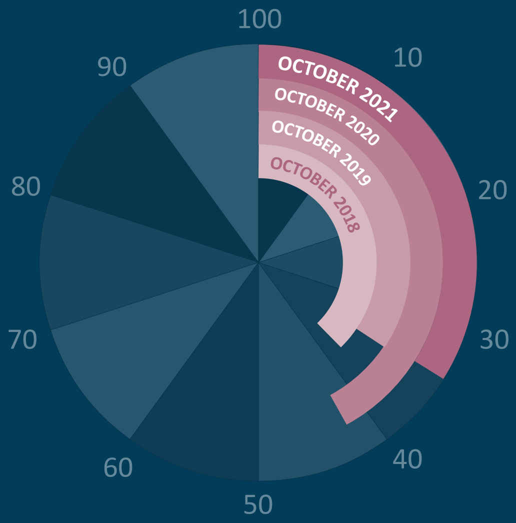


SLIGHTLY LESS INVITATIONS

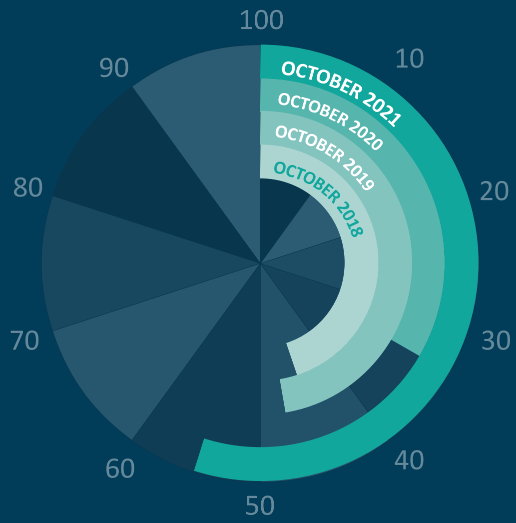


A LOT LESS INVITATIONS

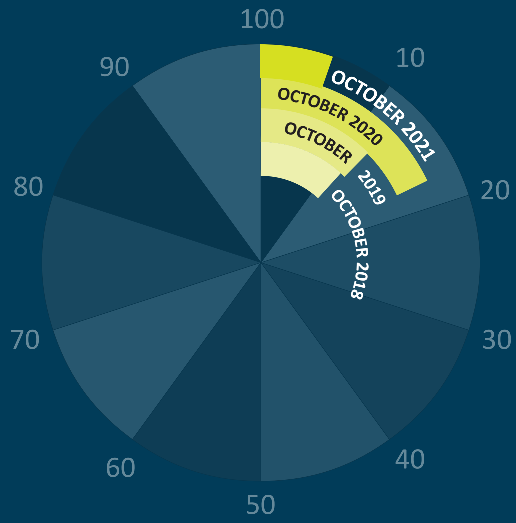
Have tender prices increased in the last 12 months when compared to the previous year? (%)



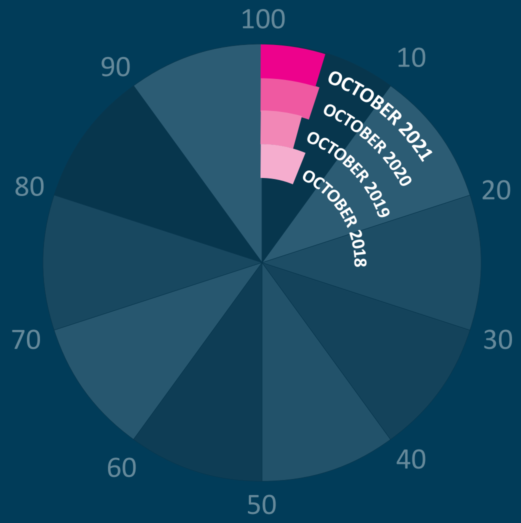
STAYED THE SAME



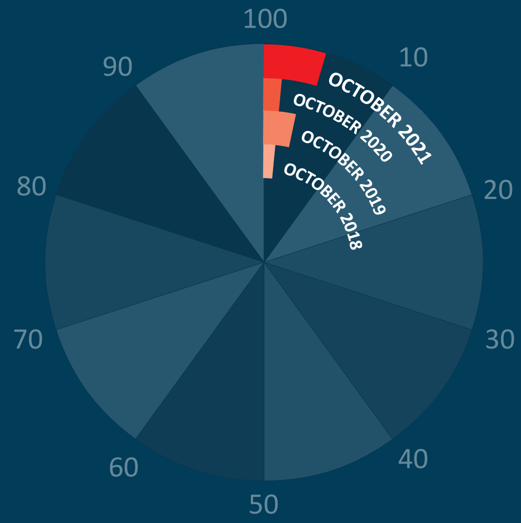
INCREASED SLIGHTLY



DECREASED SLIGHTLY

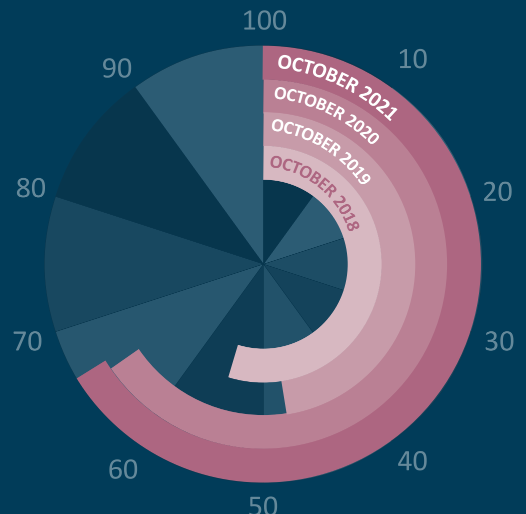


INCREASED SUBSTANTIALLY

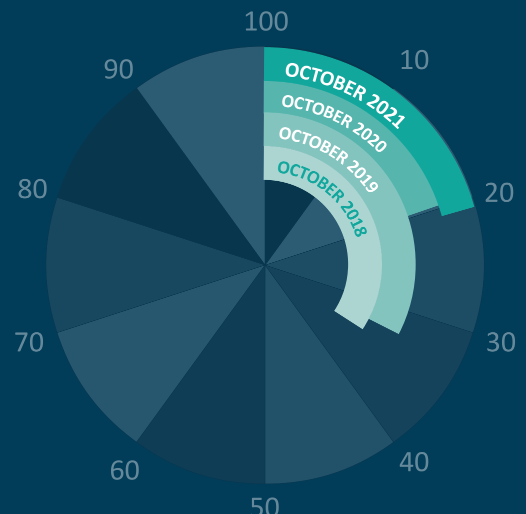


DECREASED SUBSTANTIALLY

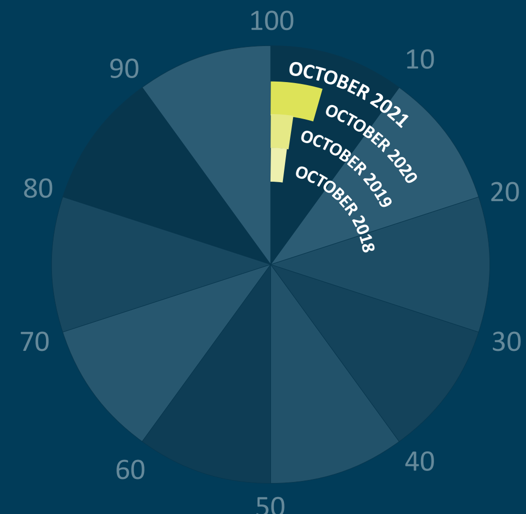
Have you seen more or less tenders in the last 12 months that require Third Party Certification when compared to the previous year? (%)



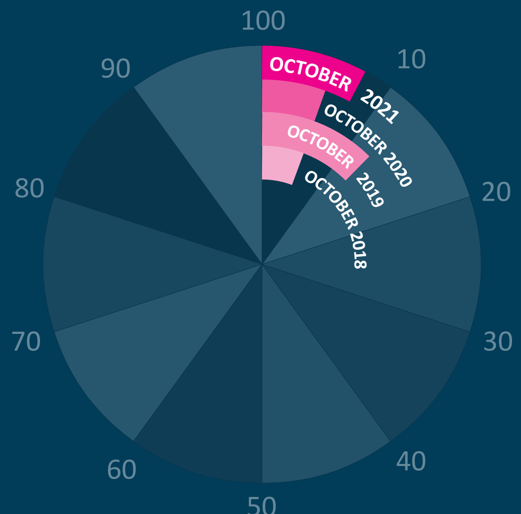
NO CHANGE



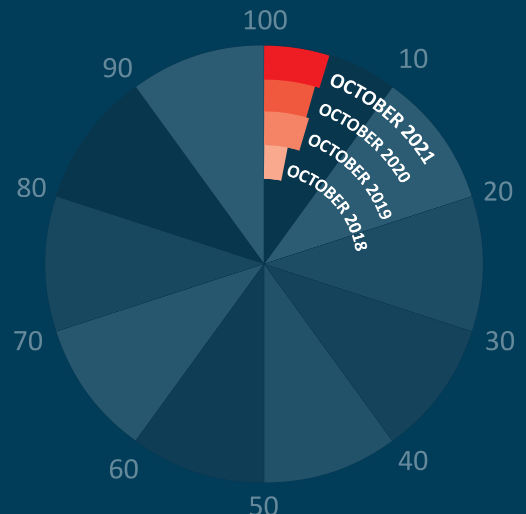
SLIGHTLY MORE



A LOT LESS

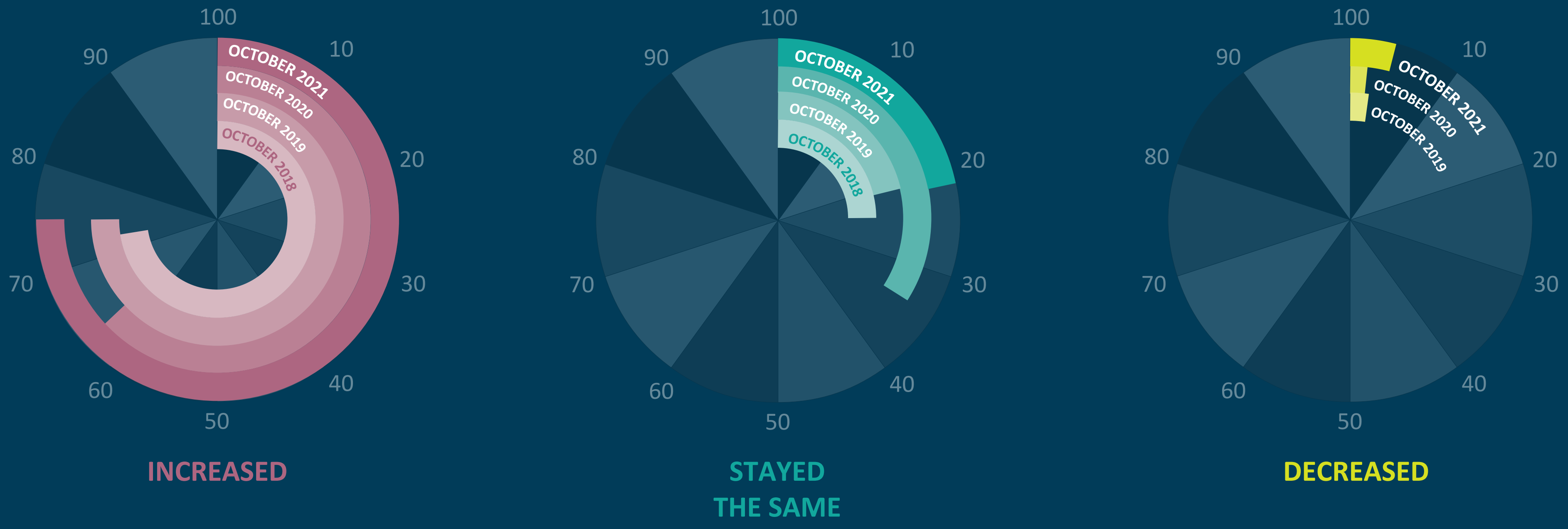


A LOT MORE

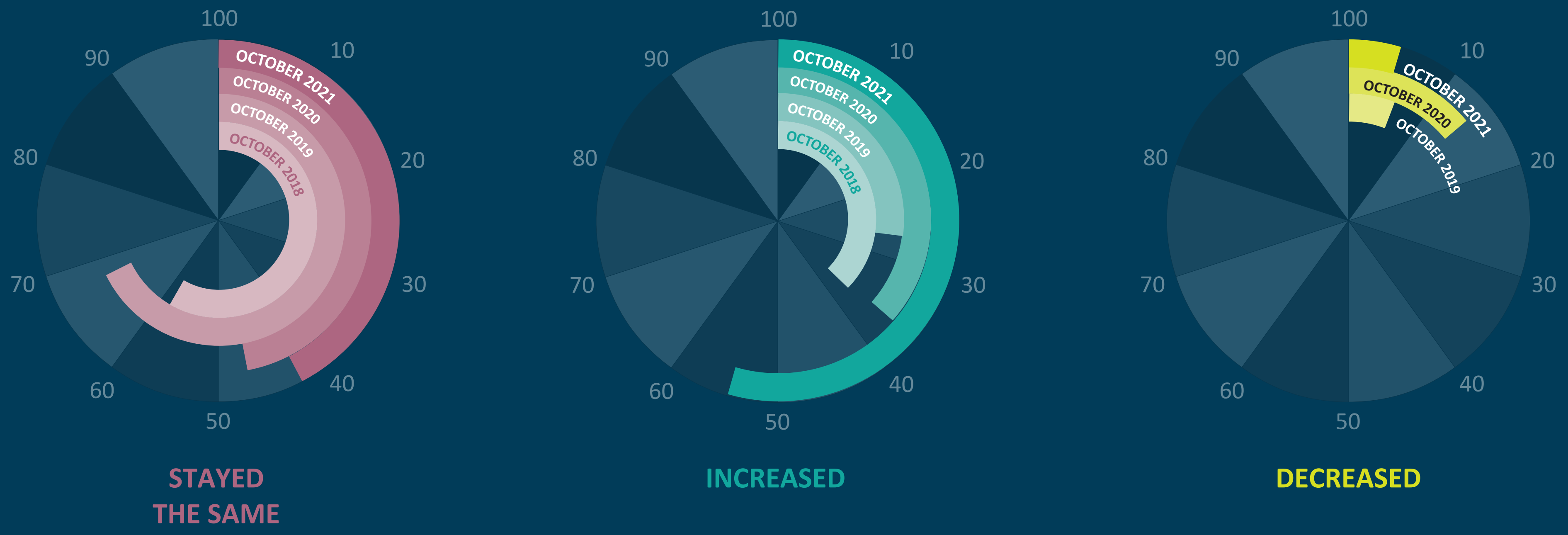


SLIGHTLY LESS

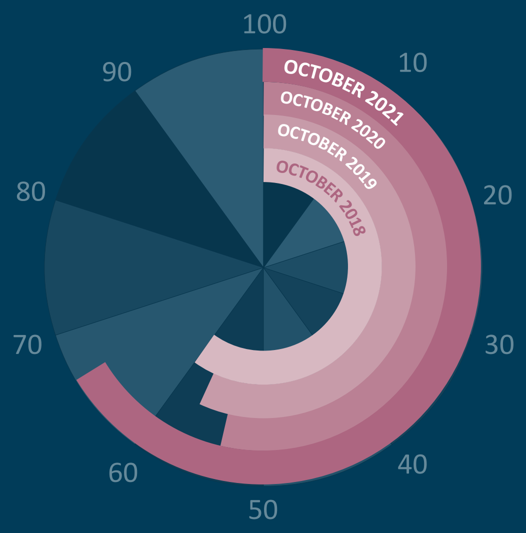
Have suppliers prices in general increased, stayed the same or decreased in the last 12 months when compared to the previous year? (%)



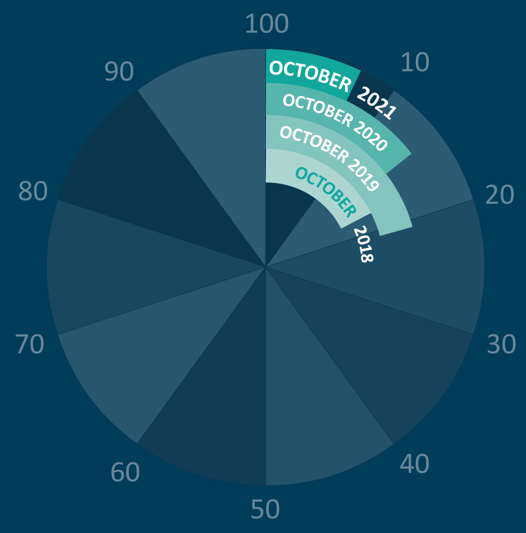
Have suppliers delivery times in general increased, stayed the same or decreased in the last 12 months when compared to the previous year? (%)



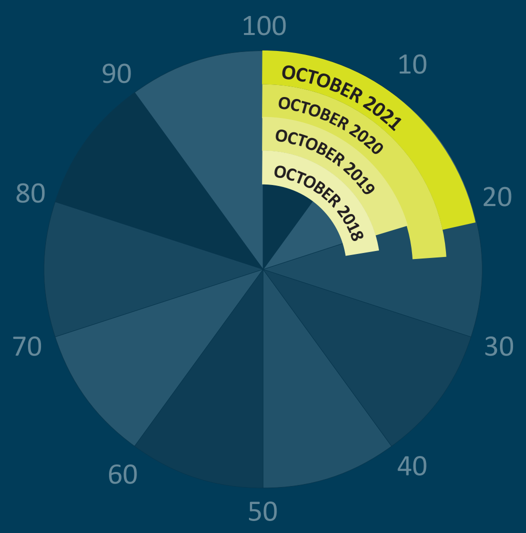
Are you generally receiving payment in (%)



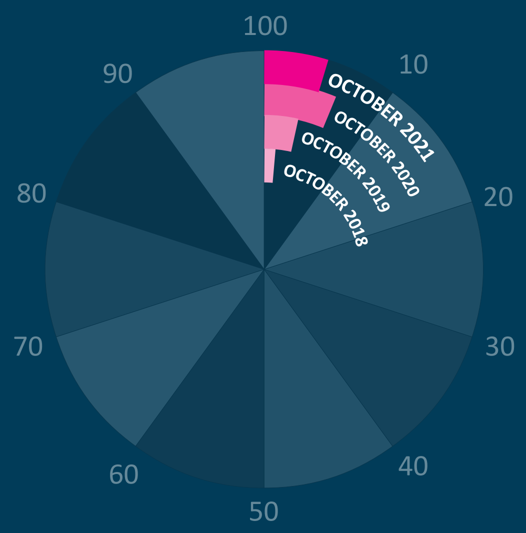
31 TO 60 DAYS?



61 TO 90 DAYS?

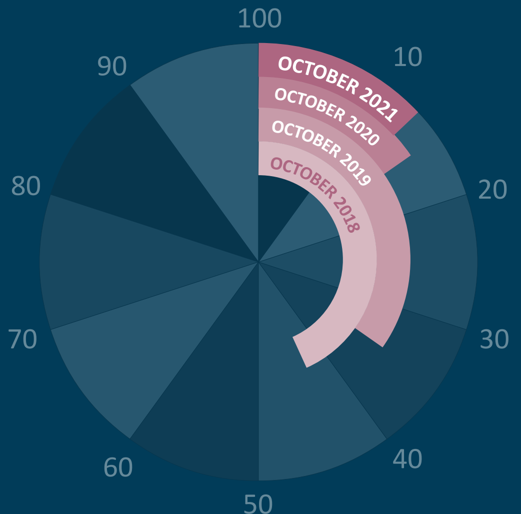


30 DAYS OR LESS

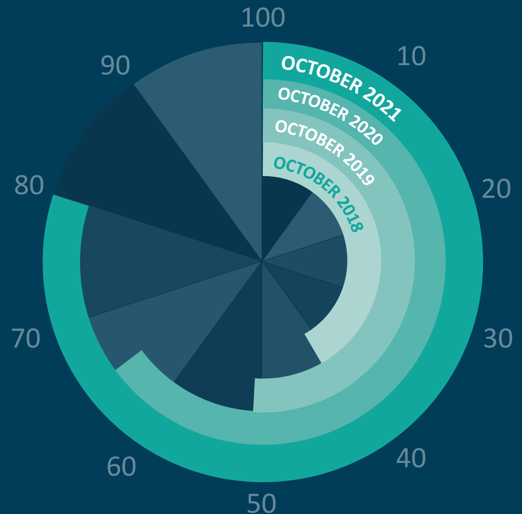


91 DAYS OR MORE?

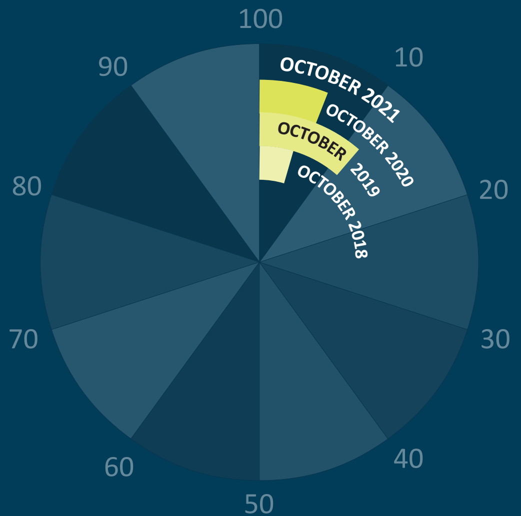
If you are an exporter, has your export business grown in the last 12 months when compared to the previous year?(%)



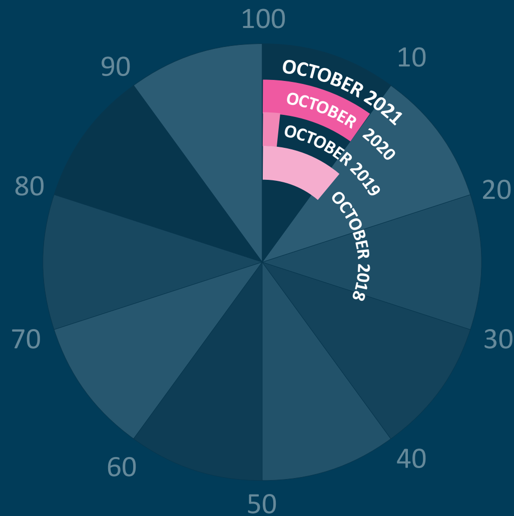
SLIGHTLY MORE



SAME

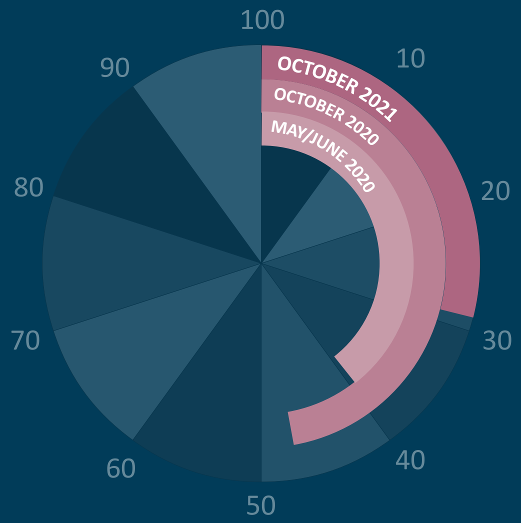


SUBSTANTIALLY MORE

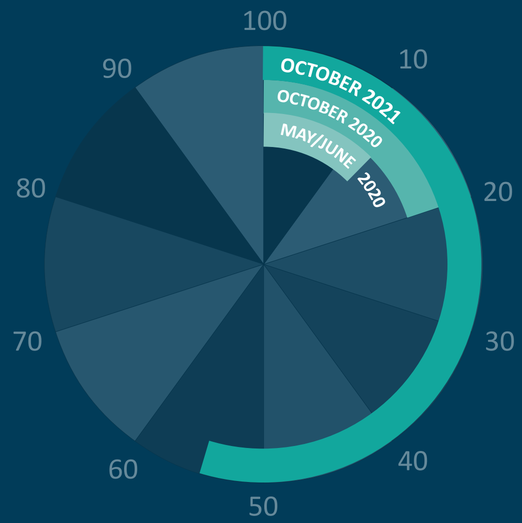


SLIGHTLY LESS

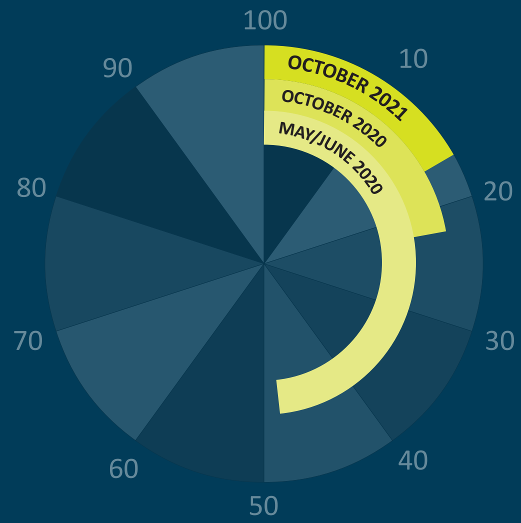
What is the estimated impact of COVID-19 on your company's overall financial performance for 2021?



MODERATE IMPACT

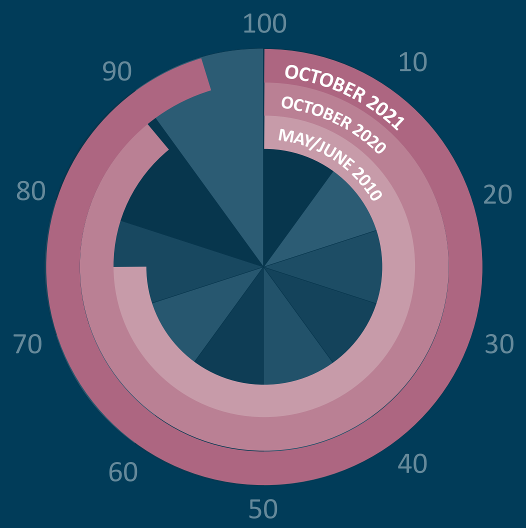


LOW IMPACT, FINANCIAL PERFORMANCE IS EXPECTED TO BE ON OR ABOVE BUDGET

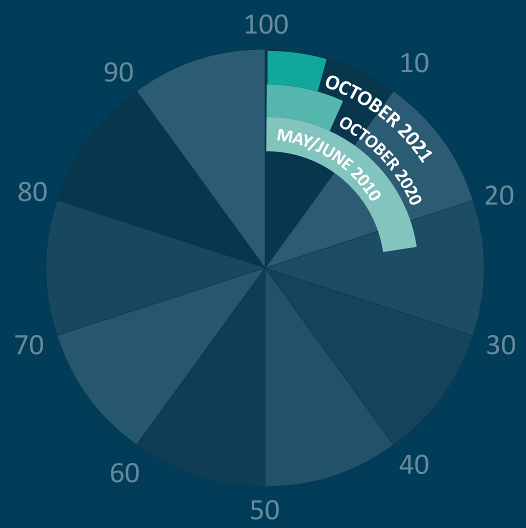


HIGH IMPACT, FINANCIAL PERFORMANCE IS EXPECTED TO BE SIGNIFICANTLY UNDER BUDGET

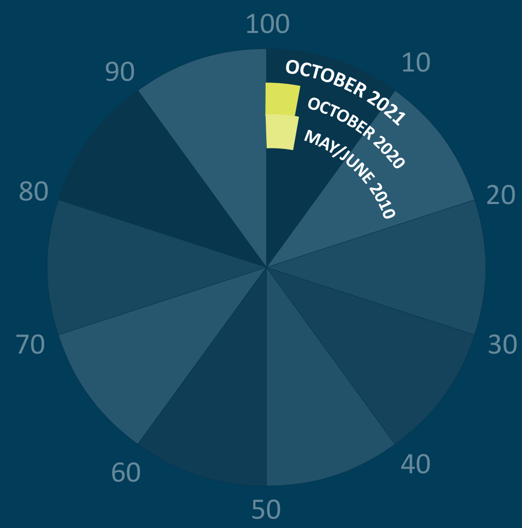
What percentage of your client base do you forecast might be lost?



0-25%

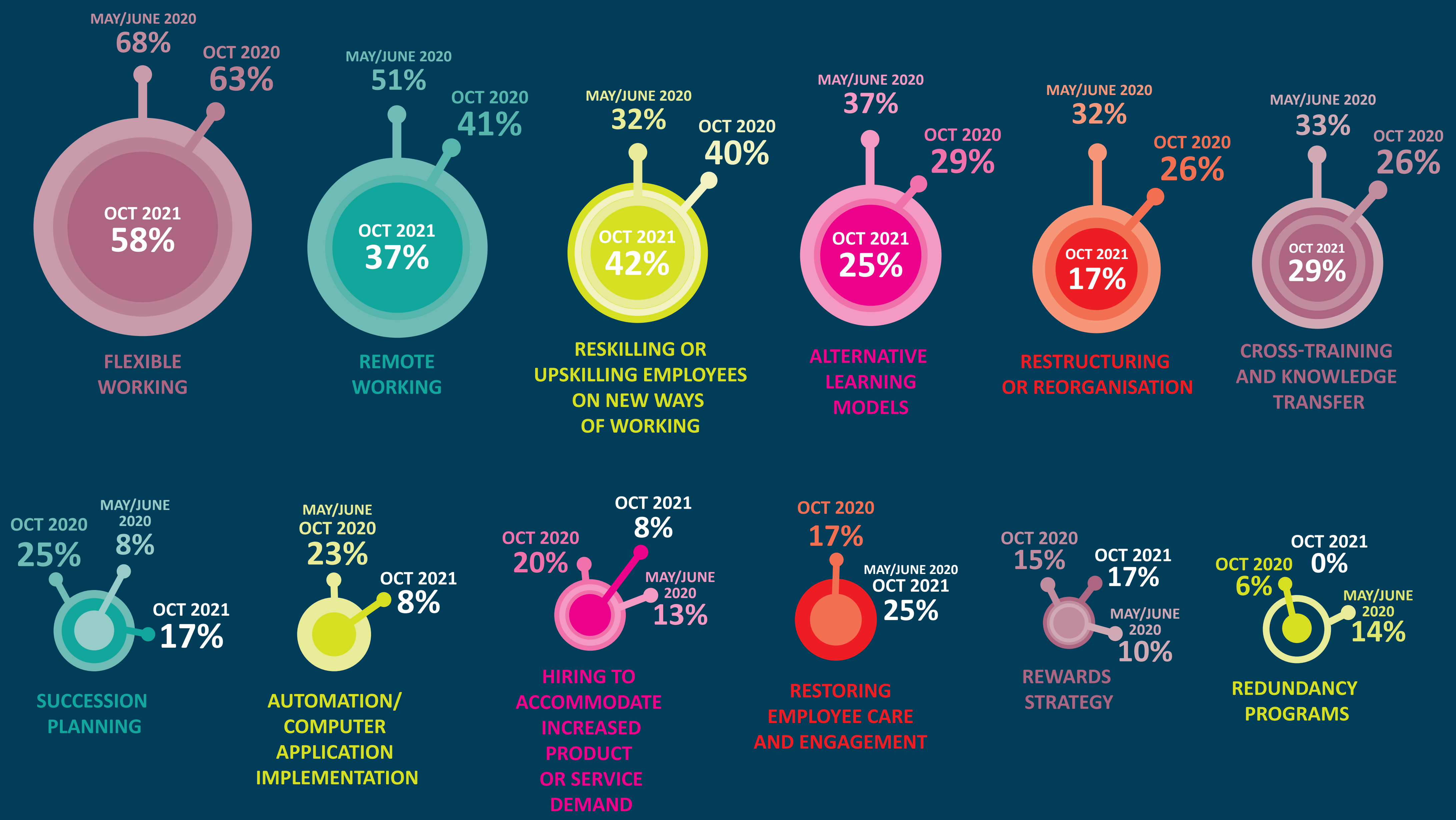


25-50%



50-75%

Which of the following workforce priorities will your company review during the next three to six months? Select all that apply



As the pandemic has progressed, have you seen in 2021 a change in levels of accessibility to your customers premises? i.e. are people locking down more, or are they becoming more relaxed and you are regaining access?