Marketing & Member Services Committee Meeting

46th Washington Forum

April 3, 2019
Agenda

• Call to Order
• Introductions
• Agenda Approval (*New Business?*)
• Minutes Approval
• Membership Update
• Indicators Survey Update
• Dues Restructuring Impact
• M&MS Work Plan
• Next Meeting
• Adjournment
WWEMA 2018 Market Indicators Survey

Overview of Final Results

Presenter:
Tina W. Wojnar
46th Annual Washington Forum
April 3, 2019
Washington, DC
Indicator Survey-General Information

• Survey was Anonymous; with both Manufacturers (25) and Reps (6)

• Survey had 2 Primary Questions (with 8 subparts):
  – Water/Wastewater industry growth over last year
    (Sept 2017 – Aug 2018)
  – Water/Wastewater industry *estimated* growth over next year
    (Sept 2018 – Aug 2019)

• Data Range Categories in Increments of 2.5%:
  – Values: -10%, -7.5%, -5%, -2.5%, 0, 2.5%, 5%, 7.5%, 10%
Business Categories Evaluated

• Domestic Sales
• International Sales
• Bookings/Orders
• Quotes
• Design Work
• Company Employment
• Material Costs
• Industry Market Growth
High-Level Summary
Initial Period

• Domestic Sales
  – ~ 70% had positive domestic sales growth
  – Prior survey showed only 55% growth

• International Sales
  – Not as Robust as Domestic Sales
  – ~ 2 of 3 companies noted flat sales

• Design Work/Quotes
  – ~ 90% of companies reported positive growth in design work
  – ~ 78% of companies reported positive quote growth
  – Above likely an indicator of future strong sales
Estimated Growth

• Positive Continued Growth Expectations

  – 94 percent of respondents projected positive bookings for the September 2018 - August 2019 reporting period

  – Approximately 1/3 anticipate domestic sales growth between 7.5-10 percent

  – Company employment is expected to continue to grow with 72 percent of companies expecting positive growth

  – Optimism is only tempered by rising costs of material inputs. Nearly 70 percent expect costs to rise as much as 5-10% between Sept. 2018 – Aug 2019
How Do Survey Results Compare with Data Reported in *Frontline News*?

- Market generally strong, but varies geographically.
- Some projects have few bidders or are even put out for re-bid, implying companies are very busy or too busy to ‘chase’ small projects.
- Projects are not just replacement, but *new* projects/upgrades.
- Generally, Reps. did indicate some possible slow down ahead, partly due to Federal government shutdown and uncertainty of national infrastructure funding bills, but steady work will continue.
Benchmarking Water/Wastewater Industry Growth

• Survey results consistent with National Association of Manufacturers (NAM) 2019 Q1 Estimates
  – ~92% of manufacturers were positive about outlook for Q1
  – ~3/4 respondents noted the inability to attract and retain workers as a top business concern
  – A record 9 consecutive quarters of optimism

• Business Roundtable/Federal Reserve
  – Business Roundtable: lowered 2019 GDP from 2.7% to 2.5%
  – Federal Reserve: lowered 2019 GDP from 2.3% to 2.1%
Final Results

• WWEMA issued a 3/25/19 Press Release with general overview results

• Detailed results and analysis for each of the 8 business areas is contained in the report on Member-only section of WWEMA website

• Report contains text analysis in addition graphs showing the last two years of data with distinct colors to easily spot trends

• Lastly, report has year-over-year summary bar chart for comparing the number of companies in a given growth range for each of the eight business areas
Onboarding & Training Resources

• Exclusively for WWEMA Members in the Members-Only Section of Website

• Overview Videos
  
  – *How Does a Wastewater Treatment Plant Get Built & Who are the Key Players?* (WWEMA-Produced Video)

  – *Home to River* (Donated by Revere Controls)
Onboarding & Training Resources (continued)

• Topic Area Resources
  – Can be videos, PDFs of guides, podcasts
  – Links to other cites (e.g., EPA/Commerce Dept.)

• Phased roll out
  – Initial Topics
    • Treatment
    • Procurement Methods
      – Overview/Comparisons
      – Design-Bid-Build
      – Design-Build
      – Case Studies (e.g., P3)
Onboarding & Training Resources (continued)

• Phased roll out
  – Subsequent Topics
    • CSOs/SSOs/Stormwater
    • Contracts
    • Manufacturer Rep-focused videos
  – Other Miscellaneous Resources
    • Association Lists
    • Water Treatment Glossary/Acronym Lists
Onboarding & Training Resources (continued)

• What topics do you want to have addressed?

• Call for Materials
  – What general (vs. product focused) materials does your company have that you might be able share?
  – Other resources you know about
  – Thank you!
Social Media

- Follow WWEMA on LinkedIn, Twitter, and Facebook

**WATER AND WASTEWATER EQUIPMENT MANUFACTURERS ASSOCIATION**

- Twitter handle: @WWEMAtweets
- Encourage you to like, comment, tag, and forward posts
- Hashtags
  - #WWEMA
  - #WashingtonForum
  - #WWEMAF&CA2019
  - #WWEMA111AnnualMeeting