



2010 Respiratory PPE Study

Which **brands** of **RESPIRATORY** personal protection equipment are considered primary or secondary by users?

What factors and product attributes are driving **purchase decisions**?

The Respiratory Personal Protection Equipment Study provides clear and actionable insight to give your company a **competitive edge**.

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**CLEARReport**
by Clear Seas Research

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Purpose & Objectives

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Study Purpose

The purpose of the 2010 Respiratory Personal Protection Equipment (PPE) CLEARReport is to understand the primary drivers of the purchase decision making process, how brands are perceived and what elements most impact customer satisfaction and brand loyalty.

Research Objectives

Specific research objectives include:

- Understanding brand familiarity
- Identifying brands purchased
- Determining purchase decision drivers
- Evaluating perceptions of product quality
- Quantifying brand satisfaction
- Understanding switching behavior

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Study Overview

Methodology

- Target Audience: A total of 29,574 active, qualified ISHN subscribers who have purchase influence over respiratory personal protection equipment
- Sample Selection Method: Systematic sample from the domestic circulation (on an Nth name basis)
- Survey Method: E-mail
- Incentive: Drawing for one of five American Express gift checks valued at: (1)\$250, (1)\$100, (3)\$50
- Field Dates: May 6 - May 18, 2010
- Completed Returns Summary:

	Number E-Mailed	Undeliverable / Opted-Out	Usable Base	Usable Returns	Response Rate
2010	29,574	698	28,876	406	1%
2007	5,843 (mail)	52	5,791	229	4%

Analysis And Presentation

4

- Tabulations were generated using a statistical software package. Additional analysis was conducted using SPSS a statistical software program.
- The data is presented in graphical and tabular format detailing the number of respondents who answered each question.
- Some questions in this survey requested respondents to write in a response. These responses have been categorized to be quantifiable. The verbatim responses are available on request.

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Study Results

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Purchase Sources

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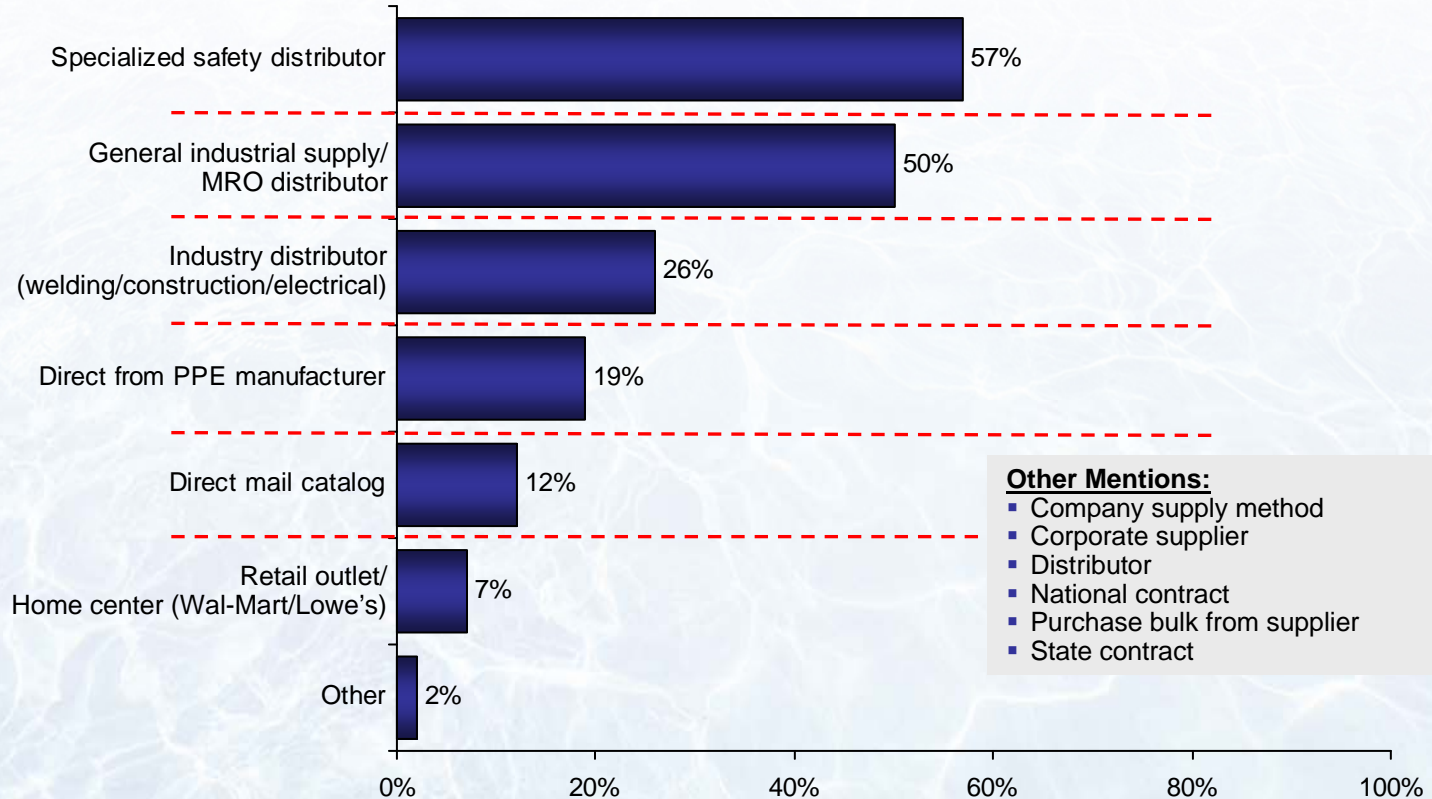
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Purchase Sources for Respiratory Personal Protection Products

Almost three in five respondents purchase their respiratory personal protection products from specialized safety distributors. General industrial supply/MRO distributors are also heavily utilized, followed by industry distributors.



n = 406

Differences of 4.1% are considered significant using a 90% confidence interval and are indicated by - - - - -

Q2. From what sources do you purchase Respiratory personal protection products from?

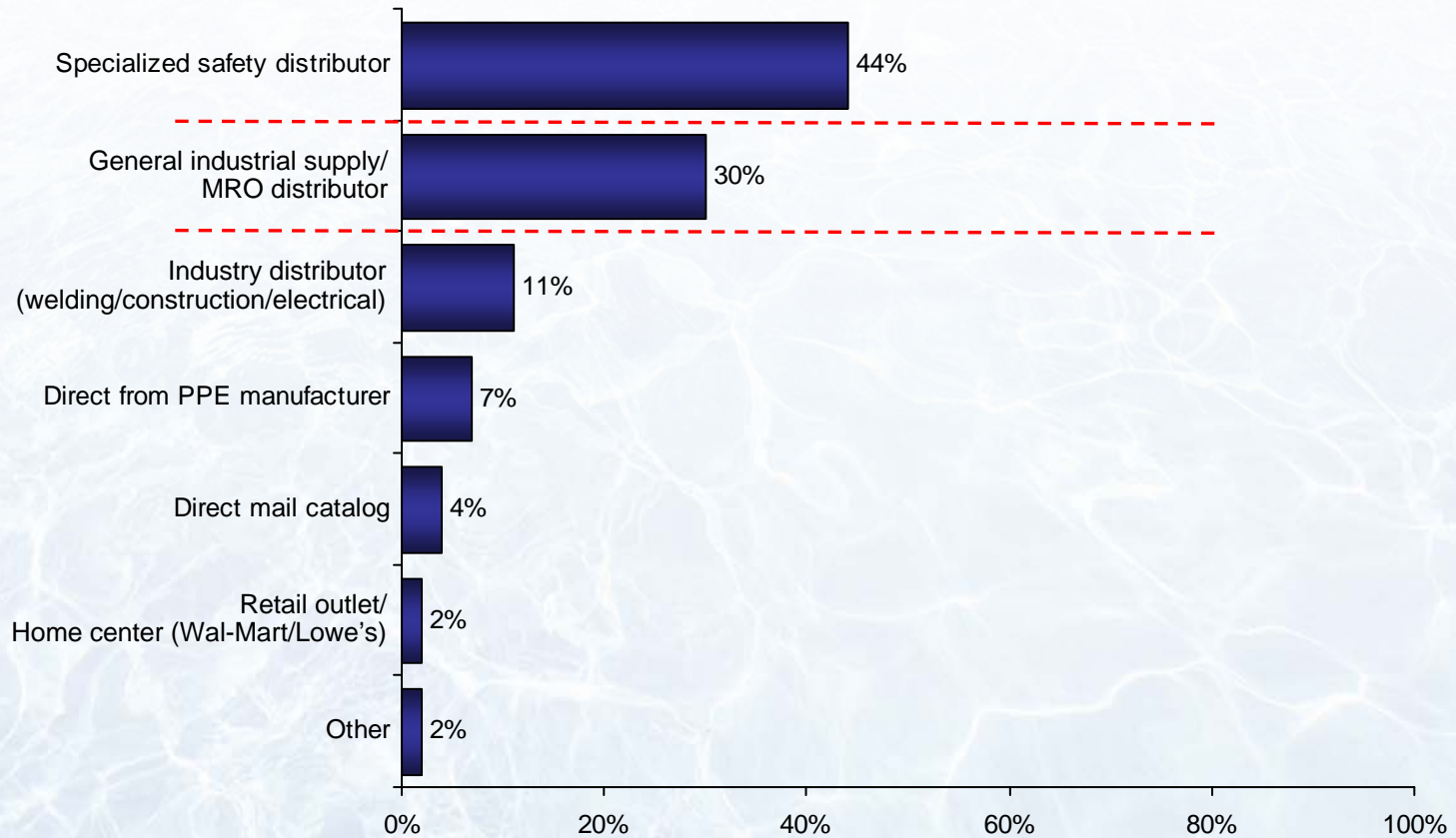
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Preferred Purchase Source for Respiratory Personal Protection Products

Respondents prefer to purchase their respiratory personal protection products from a specialized safety distributor followed by a general industrial supply/MRO distributor.



n = 406

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Q3. From which ONE source do you most prefer to purchase Respiratory personal protection products from?

Total may not equal 100% due to rounding

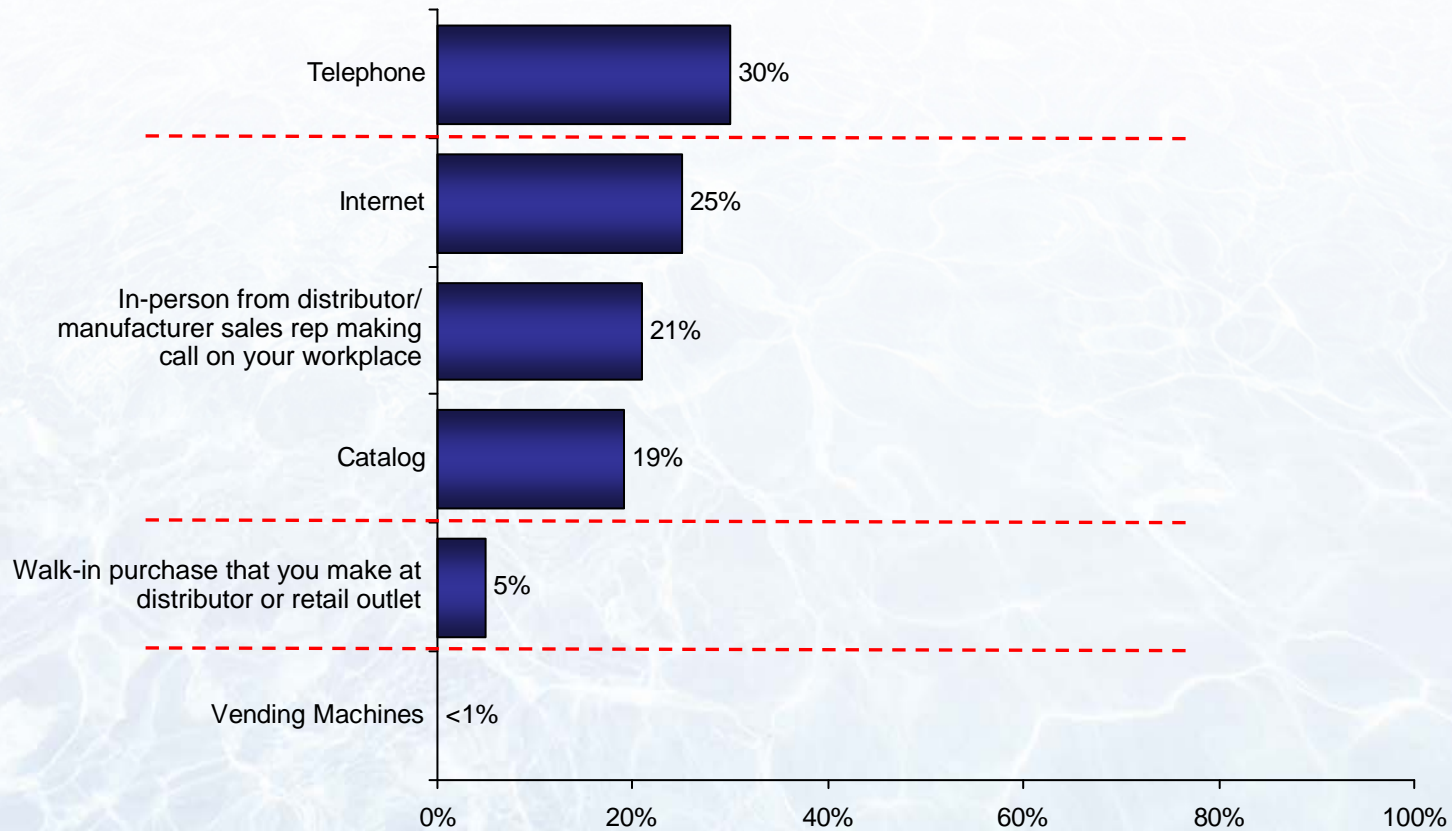
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Respiratory PPE Purchase Channels

Telephone order placement is the primary channel for ordering respiratory PPE products.



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Q4. What percentage of your Respiratory PPE purchases are ordered through each of the channels listed below?

Total may not equal 100% due to rounding

Mean percentages

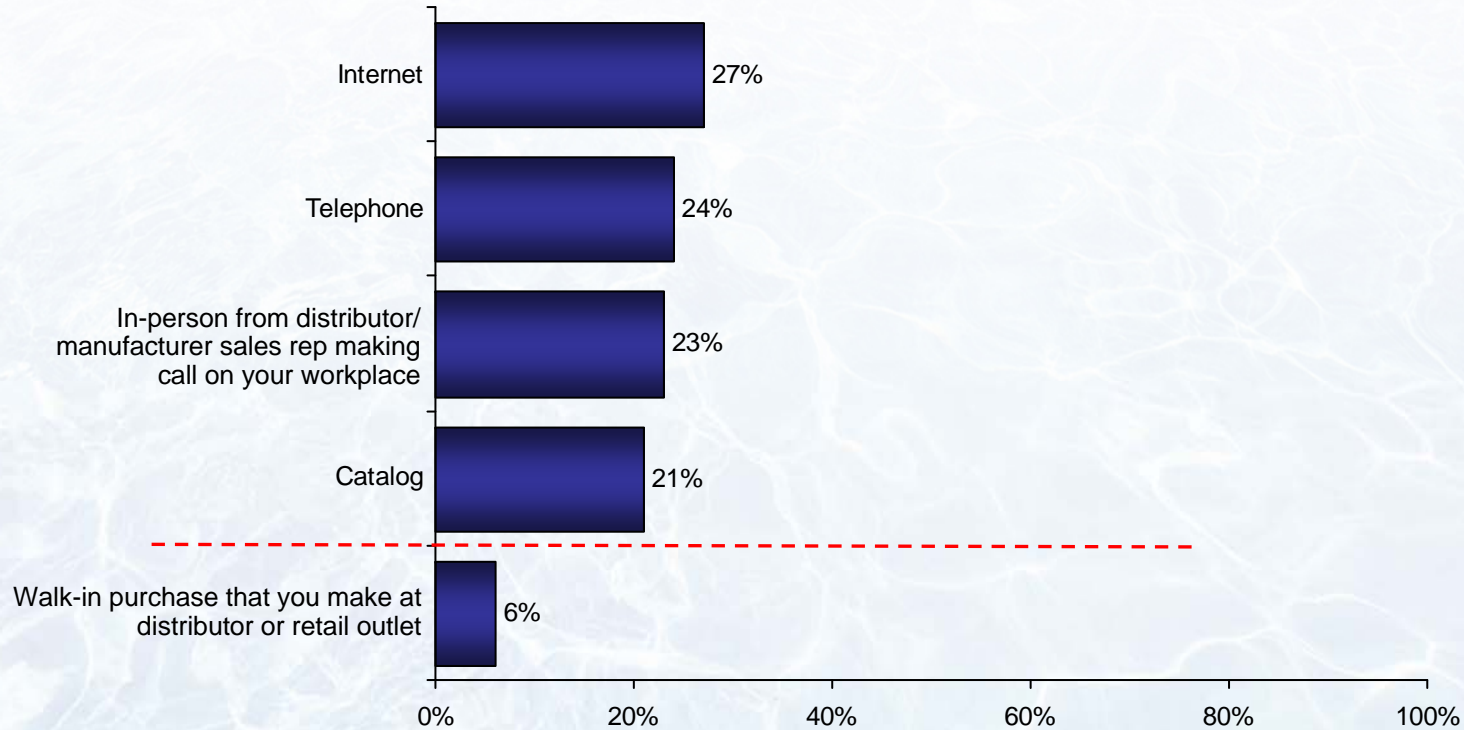
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Preferred Respiratory PPE Purchase Channel

Respondents prefer to purchase their respiratory PPE through the Internet, telephone, in-person from distributors or sales reps, or through catalogs. There is not one method that stands out from others as being most preferred.



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Q5. From which ONE channel do you most prefer to purchase Respiratory personal protection products from?

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Employee Purchases

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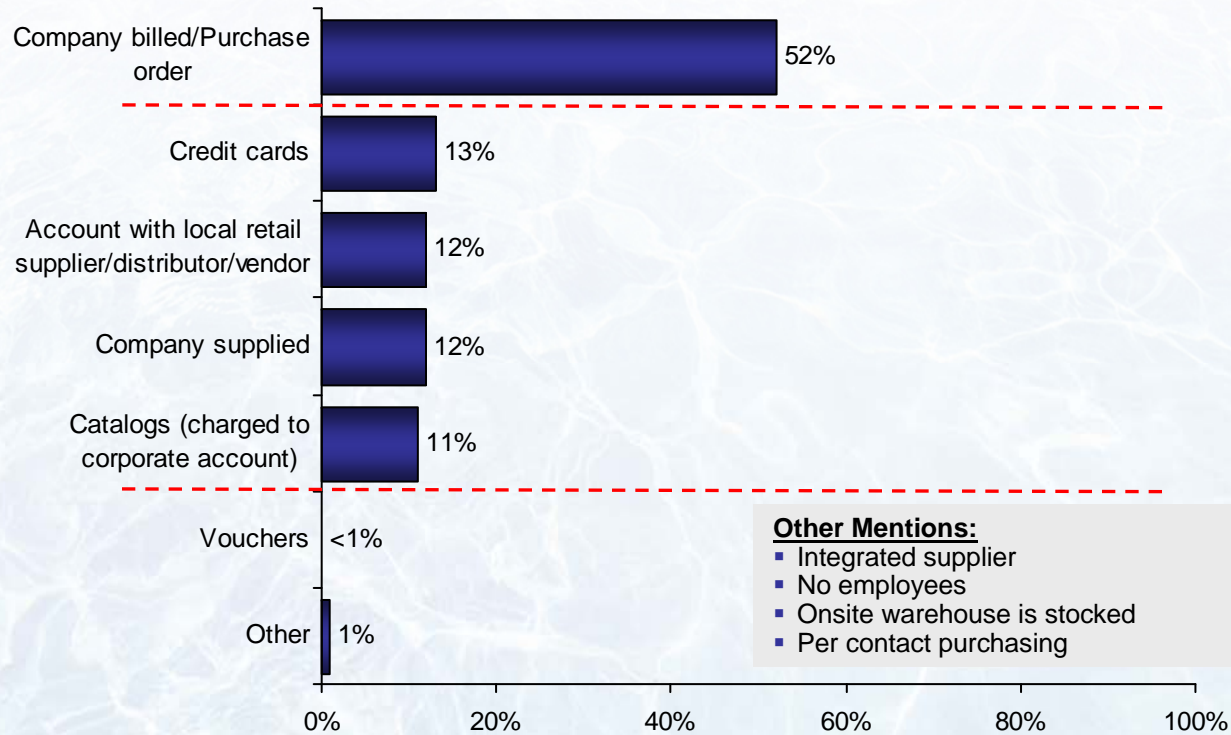
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Employee Respiratory PPE Purchases

More than half of respondents say that employee purchases are made via company billed/purchase orders.



n = 406

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Q6. What percentage of your employees Respiratory personal protection equipment purchases are made via:

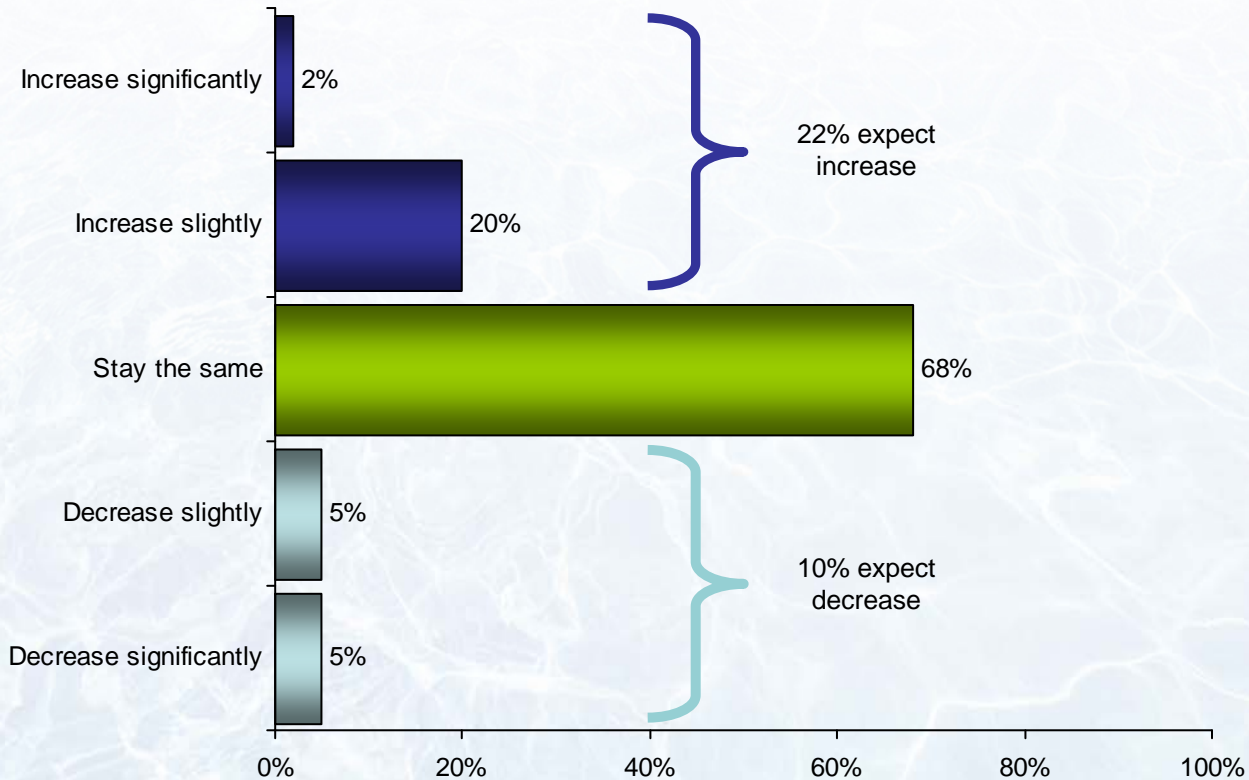
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Changes in Employee Respiratory PPE Purchases

More than two-thirds of respondents expect employee purchases of respiratory PPE to remain the same over the next year.



n = 406

Q7. Do you expect the percentage of Respiratory PPE purchases that are made by employees in the next year to:

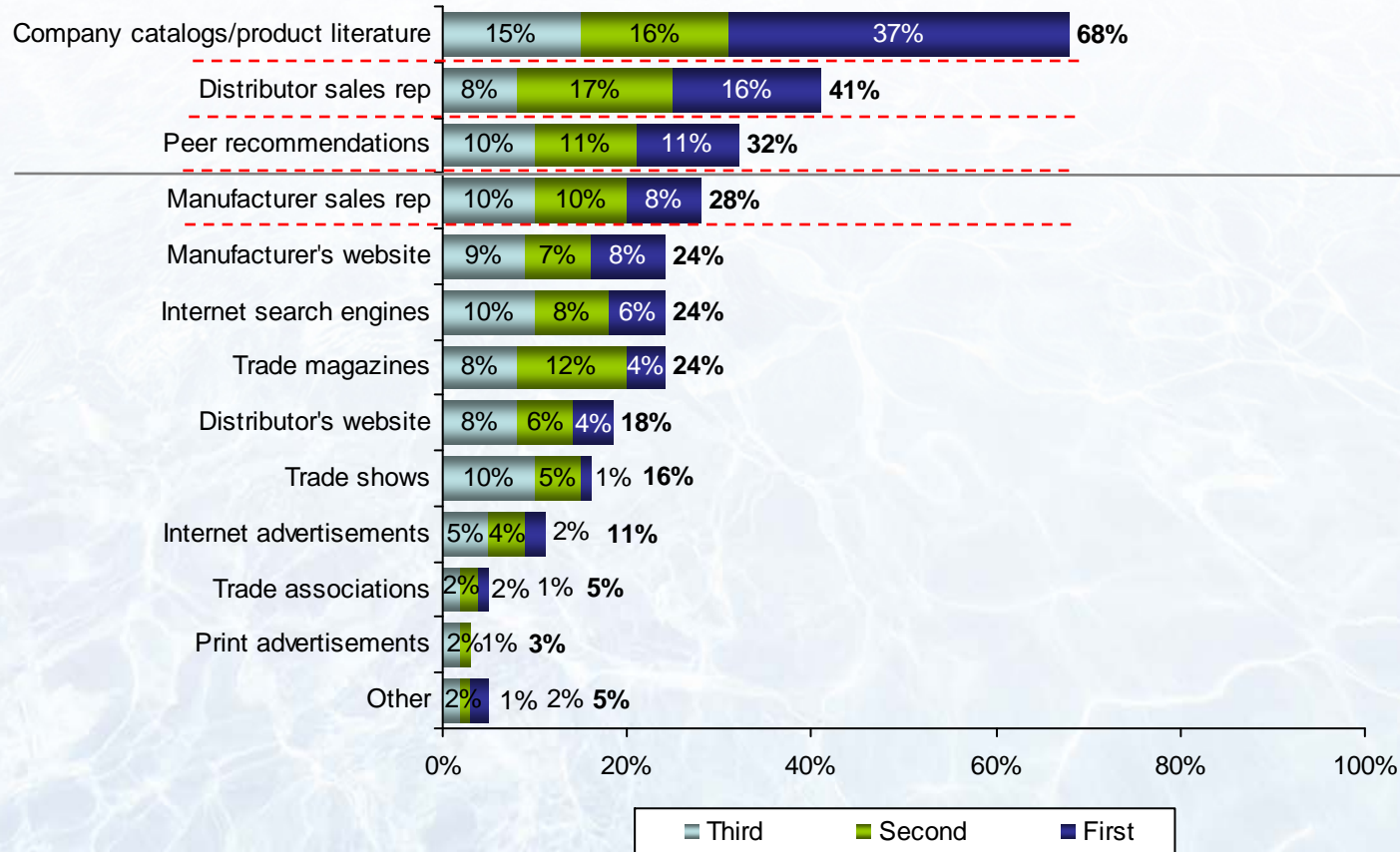
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Top 3 Preferred Information Sources for Respiratory PPE Purchases

Company catalogs/product literature, Distributor sales reps and peer recommendations are the top three preferred information sources for respiratory PPE purchases.



n = 406

Differences of 4.1% are considered significant using a 90% confidence interval and are indicated by - - - - -

Q8. Which of the following are your TOP 3 preferred information sources to use when deciding which Respiratory PPE products to purchase?

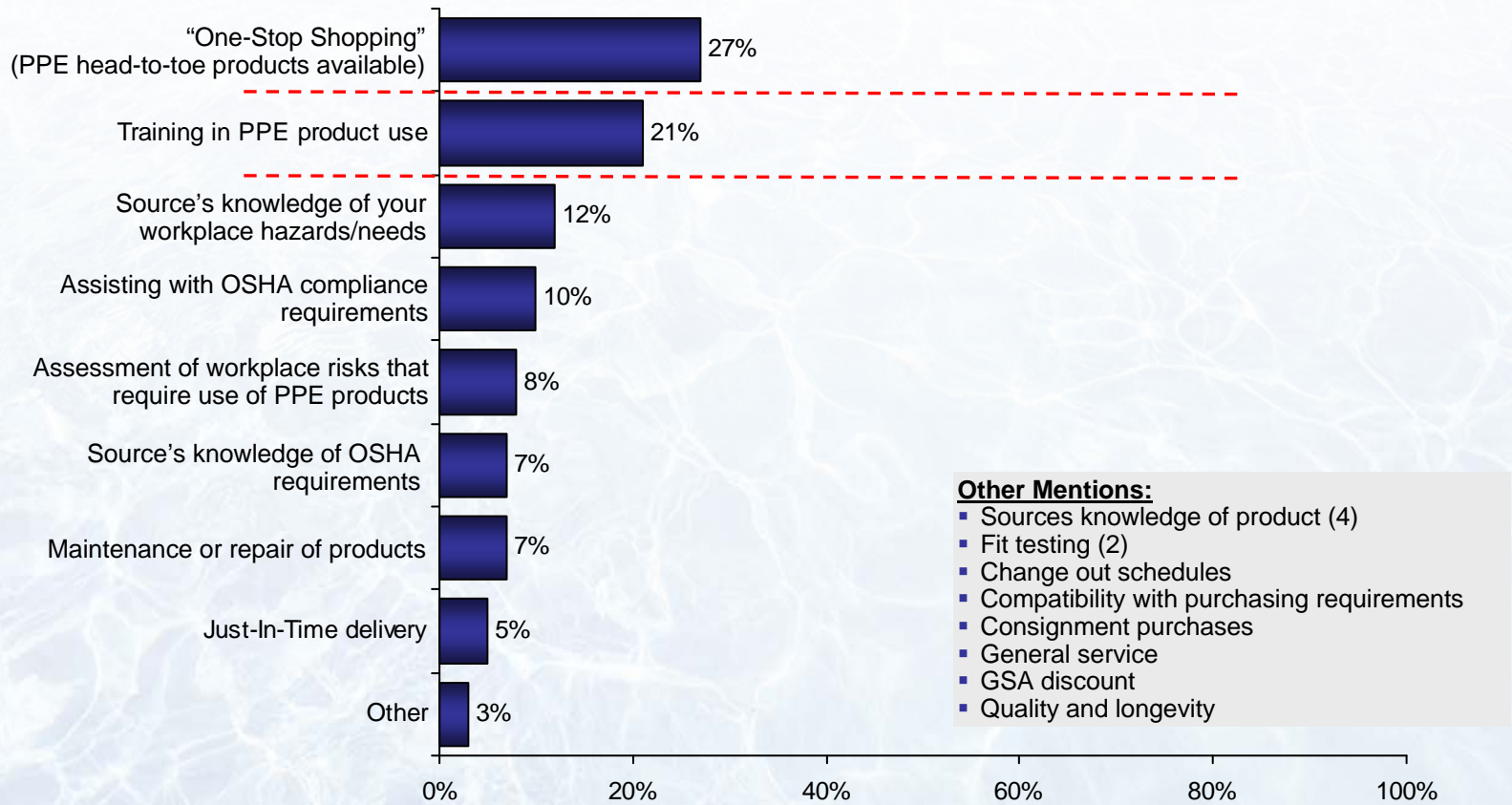
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Value Added Service

Providing “One-Stop Shopping” is the most important ‘value added’ service when making a respiratory PPE purchase.



n = 406

Differences of 4.1% are considered significant using a 90% confidence interval and are indicated by - - - - -

Q9. When purchasing Respiratory PPE, which ONE “value added” service provided by your purchasing source is most important to you?

Total may not equal 100% due to rounding

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Product Attribute Importance

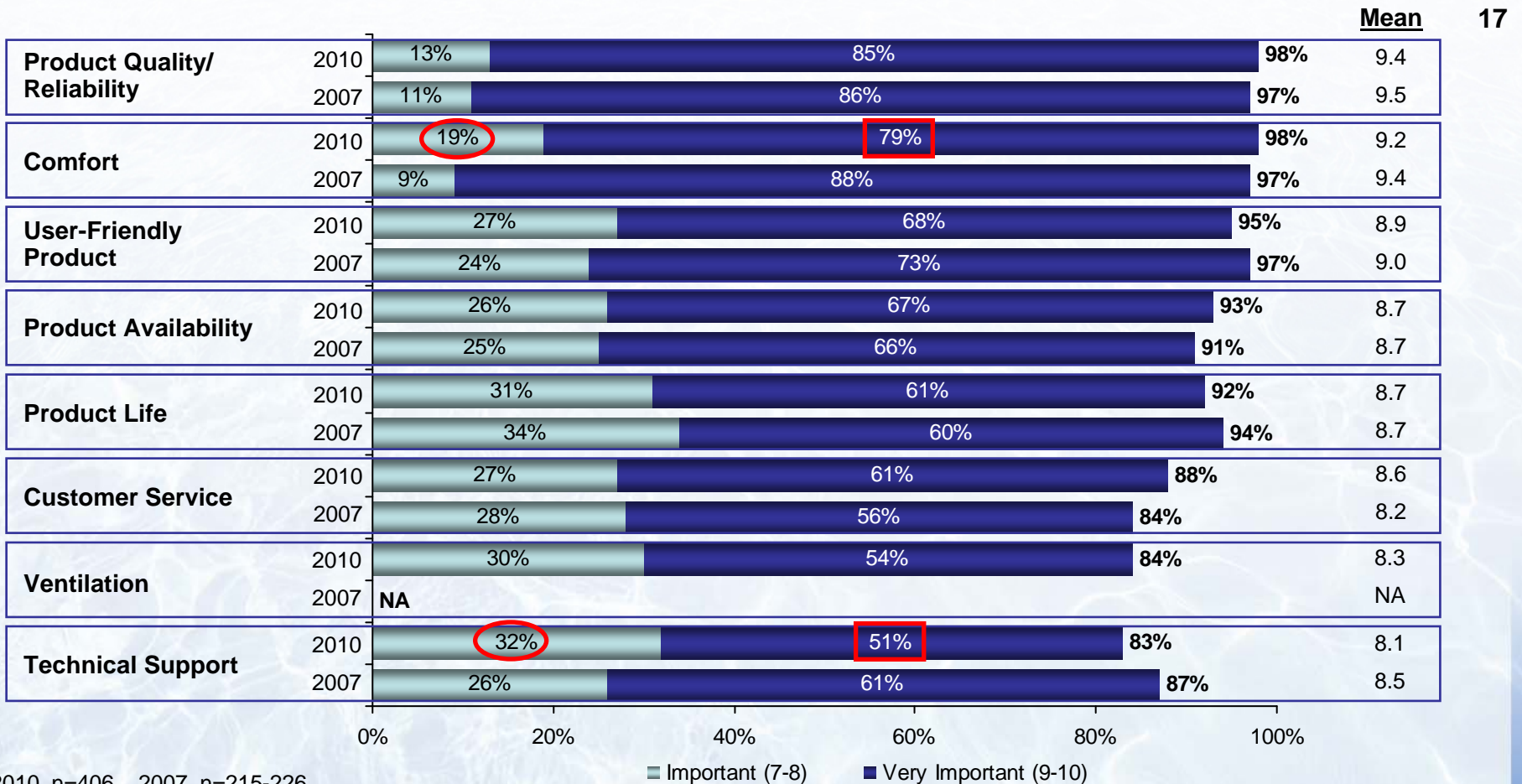
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Attribute Importance in Brand Selection

Respondents rate product quality/reliability and comfort as the most important attributes when purchasing respiratory personal protection equipment in 2010.



2010 n=406 2007 n=215-226

Increases / Decreases of 5.8% are considered significant using a 90% confidence interval and are indicated by /

Q10. Using a "1" to "10" scale, where "1" is Not at All Important and "10" is Very Important, please rate how important each of the attributes or characteristics are when selecting or purchasing Respiratory PPE.

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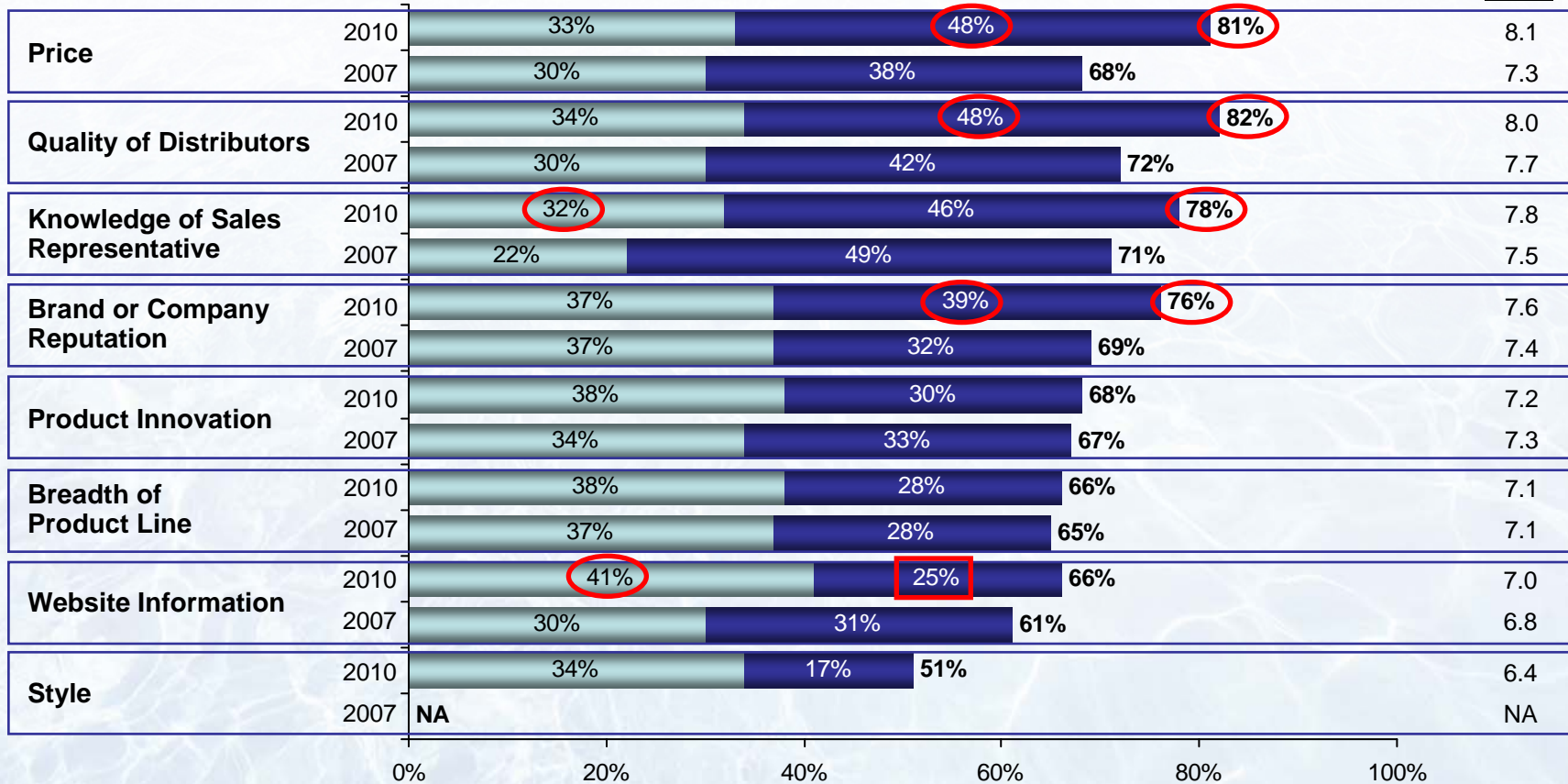
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Attribute Importance in Brand Selection

There has been a significant increase in the importance of price, quality of distributors, knowledge of sales representatives, and brand or company reputation in brand selection among respondents since 2007.

...continued from previous page.

Mean 18



2010 n=406 2007 n=215-226

■ Important (7-8) ■ Very Important (9-10)

Differences of 5.8% are considered significant using a 90% confidence interval and are indicated by ○ / □

Q10. Using a "1" to "10" scale, where "1" is Not at All Important and "10" is Very Important, please rate how important each of the attributes or characteristics are when selecting or purchasing Respiratory PPE.

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Brand Satisfaction

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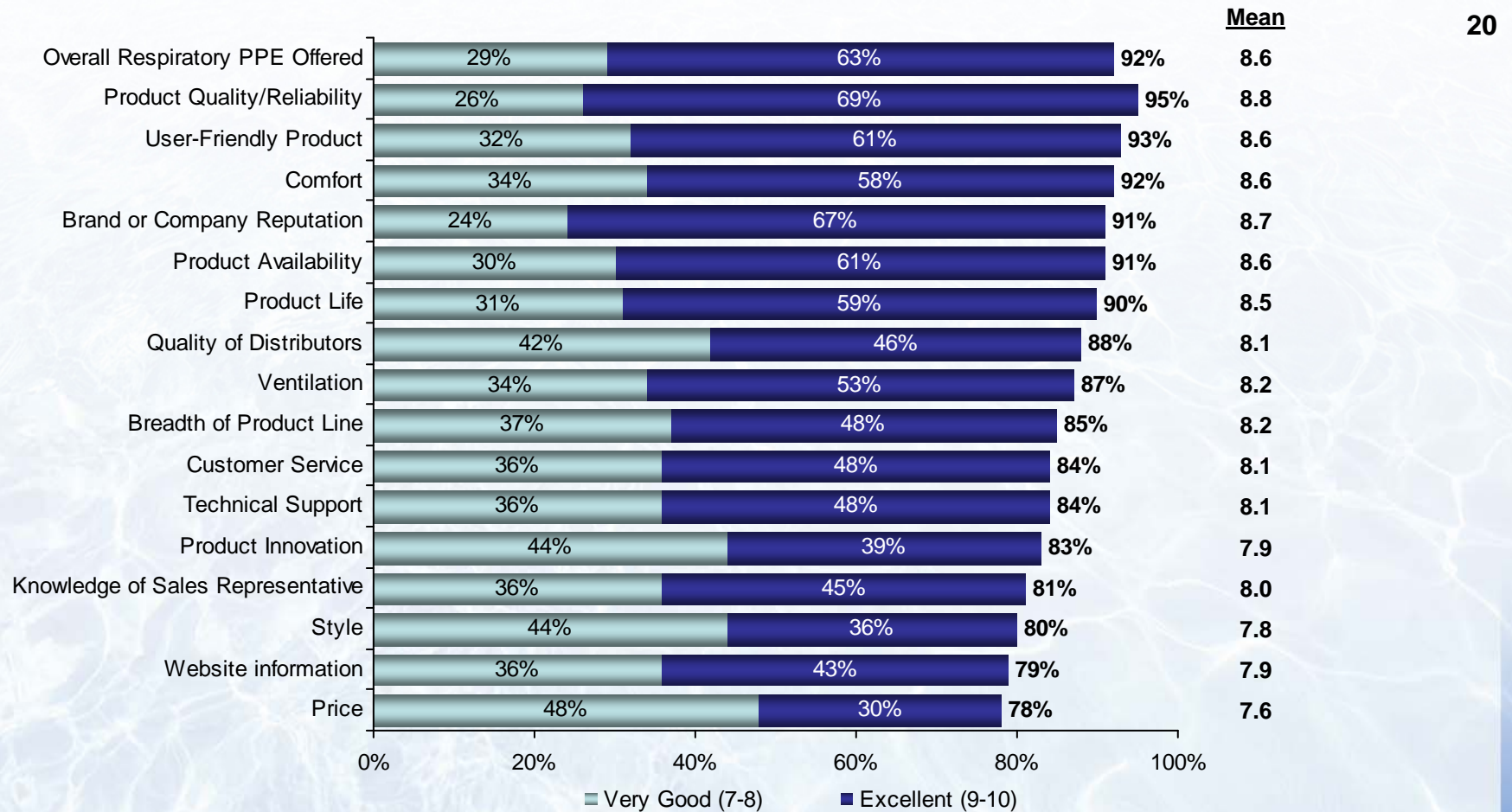
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Primary Manufacturer Attribute Ratings for Respiratory PPE

Over nine in ten rate the brand of Respiratory PPE they offer most often very good or excellent overall. Product quality/reliability, and brand or company reputation are the attributes respondents are most likely to rate 'excellent' from their current primary Respiratory PPE provider, followed by user-friendly product, product availability, product life and comfort.



Q12A. Thinking of Respiratory PPE only, please rate (Brand Selected Most Often) on the following attributes:

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Demographic Profile

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Primary Industry Served

	2010 n=406
Fabricated Metal Products	12%
Construction	11%
Chemical Mfg.	9%
Public Admin/Government	7%
Plastic & Rubber Products Mfg.	5%
Utilities	5%
Food/Beverage Mfg.	5%
Petroleum & Coal Products	4%
Healthcare & Social Assistance	3%
Professional/Scientific/Technical Services	3%
Educational Services	3%
Transportation Equipment Mfg.	3%
Primary Metal Mfg.	3%
Computer & Electronics Mfg.	2%
Machinery Mfg.	2%
Transportation & Warehousing	2%
Mining	2%
Oil & Gas Industry	2%
Agriculture	1%
Aerospace	1%
Electrical/Appliance & Component Mfg.	1%
Government/Military	1%
Waste Management	1%
Paper Mfg.	1%
Printing/Information	1%
Textile Mills/Apparel Mfg.	1%
Wood/Furniture Product Mfg.	1%
General Manufacturing	1%
Coating/Powders	1%
Pharmaceutical	1%
Paint	1%
Other	3%

Other Mentions:

- Beverage Distributor (2)
- Consulting Engineer (2)
- Various (2)
- Adhesive/Sealant Mfg.
- Cement Mfg.
- Commercial Fishing
- Equipment Dealership
- Fence Installation
- Glass Mfg.
- Insurance
- Optical Mfg.
- Restoration
- Sports Novelty Products

Q16. Which industry do you primarily serve?

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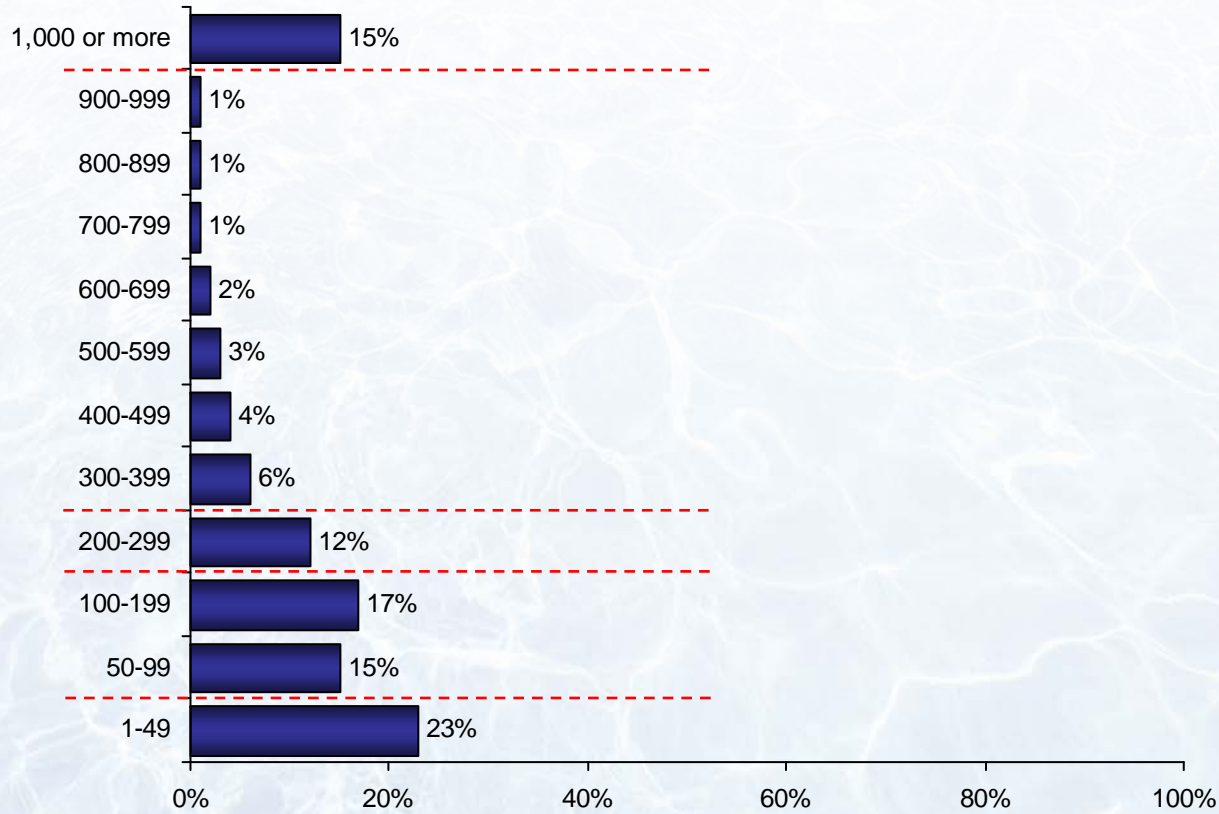
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Number of Employees

Survey participants report working at a location with a median of 100-199 employees.



n =406

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Q19. How many people are employed at this location?

Total may not equal 100% due to rounding

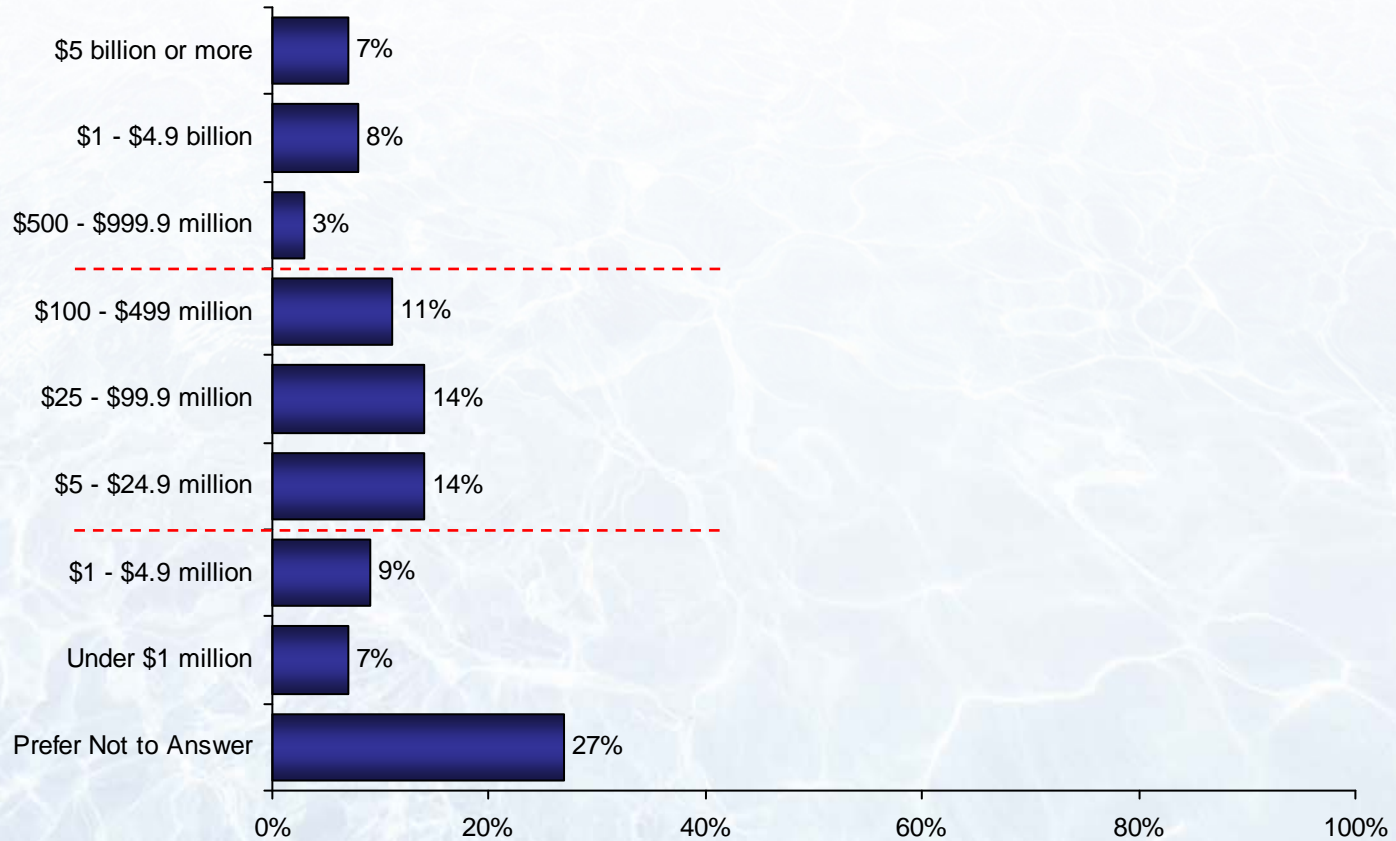
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Company Revenue

The median reported company revenue for 2009 among survey participants is between \$25 million and \$99.9 million.



n =406

Differences of 4.1% are considered significant using a 90% confidence interval and are indicated by →

Q18. What was your company's total revenue for 2009 – including all locations, divisions and subsidiaries?

Total may not equal 100% due to rounding

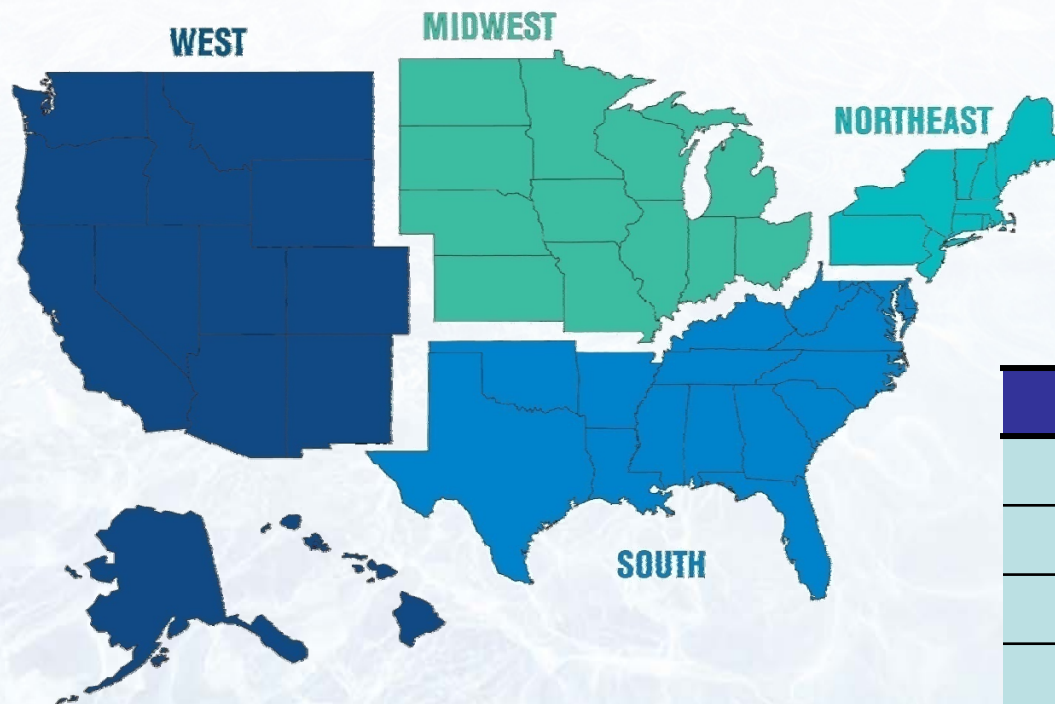
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Regional Representation

Compared to 2007 significantly greater participation was achieved from the Midwest and Western regions of the US.



Region	2010	2007
Midwest	33%	5%
South	31%	28%
West	20%	0%
Northeast	16%	67%
Sample Size	406	229

Differences of 5.8% increase/decrease /

Q17: In what state are you located?

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RESEARCH

Making the complex clear

Industry Knowledge

Clear Seas Research's extensive network of industry experts and professional trade associations maximizes accuracy within studies and promotes interaction with the target audience. Utilizing a team of qualified, experienced market analysts Clear Seas Research provides actionable results with solid research recommendations.

Clear Insight

Through expert insight and actionable results Clear Seas Research facilitates superior decision making in today's business world.

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