Canadian Police Research Centre Research Priorities and Related Services for Canadian Industry

A Needs Analysis of Canada's First Responder Vendor Community

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Executive Summary

Over the period of February and March 2006, the Canadian Police Research Centre (CPRC) in partnership with the Canadian Advanced Technology Alliance (CATA*Alliance*), conducted a Needs Assessment of the vendor community to First Responder organizations – defined as first response emergency services such as fire, police and paramedics.

The assessment resulted in the response of 69 leading firms – and provides results believed to be accurately representative of the community at large. Given the fact that there are no previous known studies of this community and that no association or publicly available government resource exists to identify them in their entirety, the final results herein do appear to offer reasonable support for the hypotheses and related conclusions outlined, but must be tempered with some caution regarding their ability to represent the community as a whole.

The assessment resulted in the following high-level results:

Demographics

The majority of respondents indicated they:

- were located in Ontario (54%)
- employed between 1 and 10 people (38%)
- have been in operation for more than 20 years (34%)
- realize annual revenues between $1 and $10 Million (CDN)
- primarily provided IT/ICT services (26%), followed by protective (18%) and surveillance (15%) equipment providers
- collaborate with both Canadian and International companies (70%) for the purposes of product development and market access

Clients and Markets

The respondents indicated that:

- police departments were their primary First Responder clients (75%)
- they have both Military (81%) and Government (91%) clients

- of government clients, federal level is largest purchaser – 41% of respondents identifying that 81 to100% of government sales made at the Federal level

- more than ¾ export their products/services – primarily to the U.S. (91%), then the U.K. and rest of E.U. (54% and 52% respectively)

Product Development and Marketing

- Most organization have collaborated with First Responders in the development of their products/services (64%) – of those who did not, 72% indicated they would be interested in doing so

- Majority have participated in trade shows to promote their product/service (88%)

- Trade shows seen most valuable for the opportunity they provide in increasing market share and personal networks

Role of Government

- Be a first buyer (85% combined Very Important and Important ratings)

- Assisting them in gaining market access and identifying business opportunities also critical

Mandate for the CPRC

- Very low awareness currently exists – only 4% of respondents indicate they are Very Familiar with CPRC – 57% indicate Not at all familiar

- Providing access to First Responders the primary need

- Field testing opportunities and testing products and services against standards another key priority area for vendors

- Majority of respondents interested in assisting in the development of standards (71%)

Conclusions

The key finding from this report is in fact the need for CPRC to conduct an aggressive awareness-raising campaign to better raise its profile among the vendor community. This assessment has helped to plant the first seeds of a growing awareness and provides an excellent opportunity, with the proper follow-up and execution, to

continue to raise the CPRC profile and the new Centre's mandate, services and subsequent accessibility to the First Responder vendor community.

With respect to the priorities for the new centre: vendors clearly indicated a need for 1) greater access to the First Responder community for co-development and promotion of products/services; 2) field testing opportunities; and, 3) an opportunity to test products against set standards. In providing trade show facilities or services, the CPRC will need to clearly demonstrate that increased market share and strong networking opportunities are the key outcomes that will result from the vendor community's participation.

Government support is required through a continued commitment of being a 'first buyer' and creating business growth through market access and business lead generation activities.

Finally, given the lack of any substantive data on the First Responder Vendor Community, a comprehensive industry profile initiative should be undertaken that helps to identify who the players are, the products and services they offer, and the specific industry trends, challenges, and existing business environment.

Gaining a better understanding of who these vendors are will allow the CPRC to better plan their awareness-raising initiatives and expand their client base for the new services and activities to be offered through the new Centre.

Introduction

The Canadian Police Research Centre (CPRC) is a partnership among the National Research Council Canada (NRC), Canadian Association of Chiefs of Police, and the Royal Canadian Mounted Police (RCMP). It is staffed by personnel from the RCMP and the NRC, and is governed by an independent advisory board made up of representatives from police and other related organizations from across Canada.

The CPRC serves as a single, national focal point for technology research and development efforts in support of Canada's law enforcement community. By promoting innovation and cooperation between the police community, governments, industry, universities, and other research organizations, the CPRC strives to ensure that the best possible resources are made available to police and related organizations in a cost-efficient and timely manner.

With the planned creation of a new research facility underway, the CPRC approached CATA*Alliance* to conduct a needs analysis of its Advanced Security Industry Profile database[1] to help the CPRC formulate the proper contextualizing around the proposed creation of this new Centre.

This assessment provides the views of the vendors to the First Responder community – defined as first response emergency services such as fire, police and paramedics – regarding their potential needs and priorities from such a centre. The assessment was also expected to provide a demographical and market-based understanding of the vendor community, as very little such data currently exists.

Approach and Methodology

A core project team consisting of Kevin Wennekes, VP Research, CATA*Alliance*, Steve Palmer, CPRC Executive Director, and Daniel Demers, Director, Strategic Initiatives, NRC, met over the course of December 2005 to January 2006 timeframe to

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[1] The first-ever 200- page report of the Canadian Advanced Technology security industry. This combined guidebook, survey and trends analysis documents the security solutions that use information and communications technology (ICT) to meet a growing range of security applications and customer needs. More information can be found at http://www.cata.ca/pssf/AdvSecIndProfile.html

establish the project's timelines, clarify respective roles and responsibilities, and obtain input on the assessment's specific line of questioning.

Needs Assessment Development

In close consultation with the Project Team, a questionnaire was created that:

- consisted of 24 closed-ended questions consisting of multiple-choice, ordinal and categorical types – the actual number of questions a respondent was asked depended on the answers provided as based on the conditional branching logic model established for this assessment
- contained two open-ended questions allowing respondents to provide answers of their own devising
- provided an area where respondents could self-identify themselves in order to receive information, via e-mail, on the progress/outcomes of the Study's recent initiatives or participate in any future Standards development initiatives
- provided a notice that the information in the survey was being collected under the authority of the Privacy Act and confidentiality was assured – in cases where respondents identified themselves for future contact, their personal identifiers were not attributed to their individual response but were only to be included in aggregate with the overall results

A copy of the final questions can be found in **Appendix A**.

The survey was officially launched on February 21 and closed on March 15, 2006.

Distribution & Communication Strategy

The sampling frame for this assessment was primarily CATA*Alliance*'s Advanced Security Industry Profile database – 700 advanced technology companies and system integrators that are involved with the advanced security industry in order to promote new commercial opportunities, joint ventures, partnerships, etc. for Canadian based enterprises (http://www.cata.ca/pssf/). All members of the database were sent an exclusive invitation (**Appendix B**) to participate.

This invitation clearly identified who was being asked to participate (vendors to the First Responder community) and further requested that should they not qualify, they

reply to CATA*Alliance* via e-mail in order to effectively remove themselves from the sample.

Further, CATA*Alliance* delivered an e-mail notification to over 20,000 individuals in its networks, posted the announcement on its website's home page, and provided a link to the online assessment in the *On-Going Surveys* Section as well. The notice sent to the CATA networks is attached in **Appendix C**.

Finally, CPRC posted an announcement regarding the assessment to their website (**Appendix D**).

These general broadcast messages directed those who were interested in and qualified to participate to contact CATA*Alliance* in order to secure access to the assessment. Upon determining their legitimacy to respond, a formal invitation to the online assessment was provided.

The invitation process provided respondents with a unique link to the assessment: in this way, a tighter control over the sample's quality is obtained and data integrity is assured as the process prevented multiple entries and uninvited access.

Confidentiality of Respondents

Any personal information collected in the survey was disaggregated from the research findings. Respondents were invited to self-identify themselves for follow-up purposes but this information was not provided in conjunction with their individual submission nor are they revealed in this report.

Simple Non Random Sample

Due to a lack of existing research regarding the size and composition of the vendor community population selling to Canadian First Responder organizations, it was not possible – given the short timelines and added funding needs to explore this – to conduct a controlled survey of this group.

However, given that the CATA*Alliance* Advanced Security Profile does contain a comprehensive listing of firms that produce products and services of a nature that could apply to First Responders, the CPRC believed this population would provide an excellent starting point for such an undertaking.

CATA*Alliance* was further selected to perform this survey due to the organization's leading expertise in delivering timely, affordable surveying of leaders in every sector of Canada's knowledge-based economy. CATA*Alliance* has members and leadership networks with very broad representation across all industry sectors. As this vendor community is not represented by a national organization, and with no "directory" listings available of these types of firms, CATA*Alliance* was best equipped with the required talent, experience, and reach to capture a significant enough response.
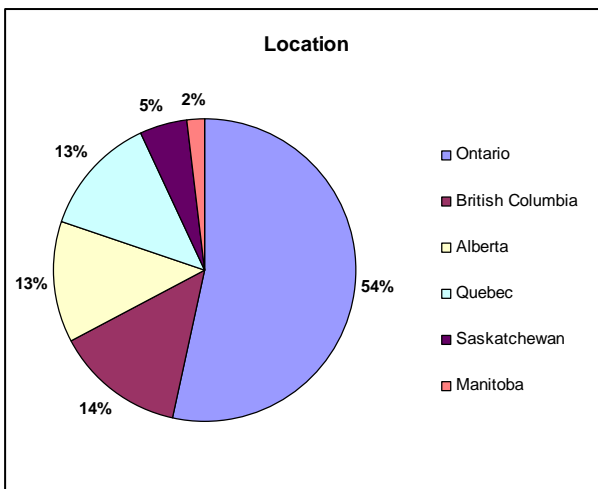
CATA*Alliance* and CPRC Partnership

This study was partially funded by the CPRC with CATA*Alliance* providing the primary resources, research methodology expertise, and remaining funding necessary to conduct the full scope of the analysis.

Overall Results

Using a simple random sample technique, the assessment secured a response from 69 firms of 566 qualified invitations, resulting in a response rate of 12%. It should be noted that it is difficult to project the vendor community's actual size due to a complete lack of previous studies on this group, and as such, the results cannot provide an accurate margin of error. However, it is believed that the results that follow are adequately representative of the community at large.

While caution should always be exercised when interpreting results from a sample to the population at large, the survey results obtained through this study would appear to offer reasonable support for the hypotheses and related conclusions outlined in this paper. Note: detailed survey responses are provided in **Appendix E**.

Demographics

Location

Ontario, British Columbia, Alberta, Quebec, Saskatchewan, Manitoba

5% 2% 13% 54% 13% 14%

As demonstrated on the charts to the left, the majority of respondents were located in Ontario (54%) followed closely by the combined Western provinces at 34%, Quebec with 13%, and, notably, no participation from the Provinces east of this border.

No. of Employees

1 to 10, 11 to 50, 51 to 500, 500 or more

9% 38% 19% 34%
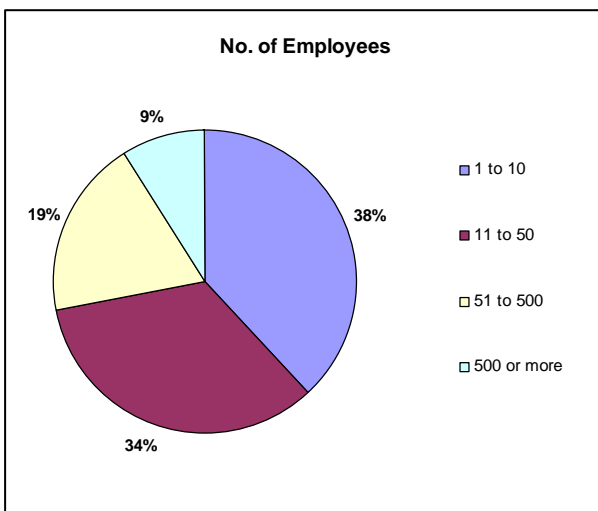
In terms of numbers of people employed, the clear majority of firms fall into the Small size category with 72% hiring less than 50 employees (38% of these hiring under 10 employees), 19% in the Medium (51 to 500 employees) and only 9% in the Large over 500+ firms.

Products and Services
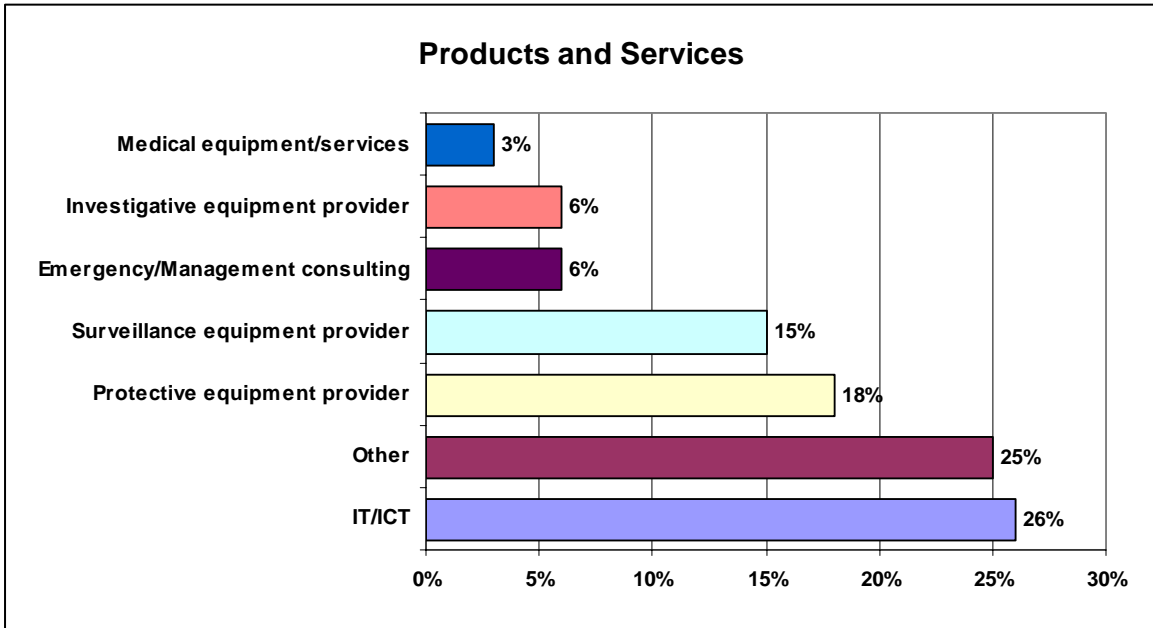
The majority of the vendors in this sample were providers of IT/ICT products and services (26%). The next largest identified category of vendors were those providing protective equipment (18%) followed by surveillance equipment (15%) providers. Medical equipment providers were the lowest identified group at 3%.

While some of the "Other" responses could have been included in the categories provided, a few could be categorized under a Product Design/T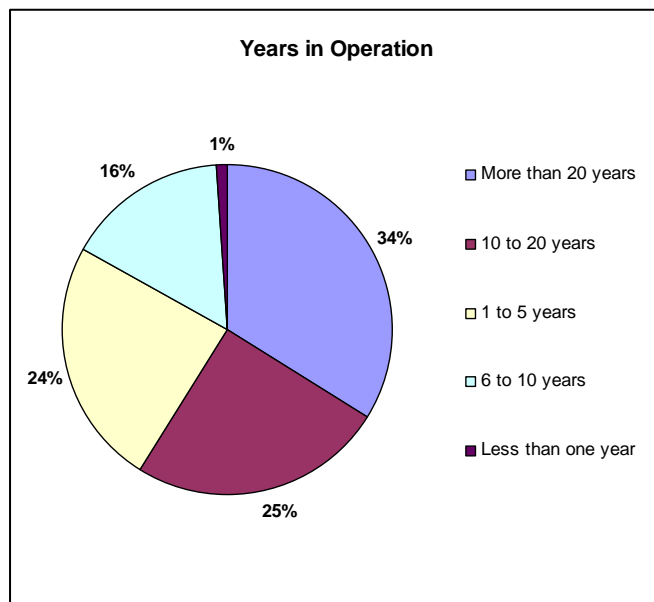esting category while others still were uniquely stand-alone, including Tactical Fog; Unmanned Vehicles; Collaborative mapping software; Diving ROV; and, emergency heating.

The majority of respondent firms have been in operation for a considerable amount of time, with 34% having been in operation for *More than 20 years*; 25% having been around between *10 and 20 years*, and only 25% indicating being in operation *for 5 years or less.*

Years in Operation

Annual Revenue

Category	Percentage
Do not know	5%
$25 Million to $50 Million	6%
$10 Million to $25 Million	8%
More than $50 Million	11%
Less than $500,000	17%
$500,000 to 1 Million	18%
$1 Million to $10 Million	36%
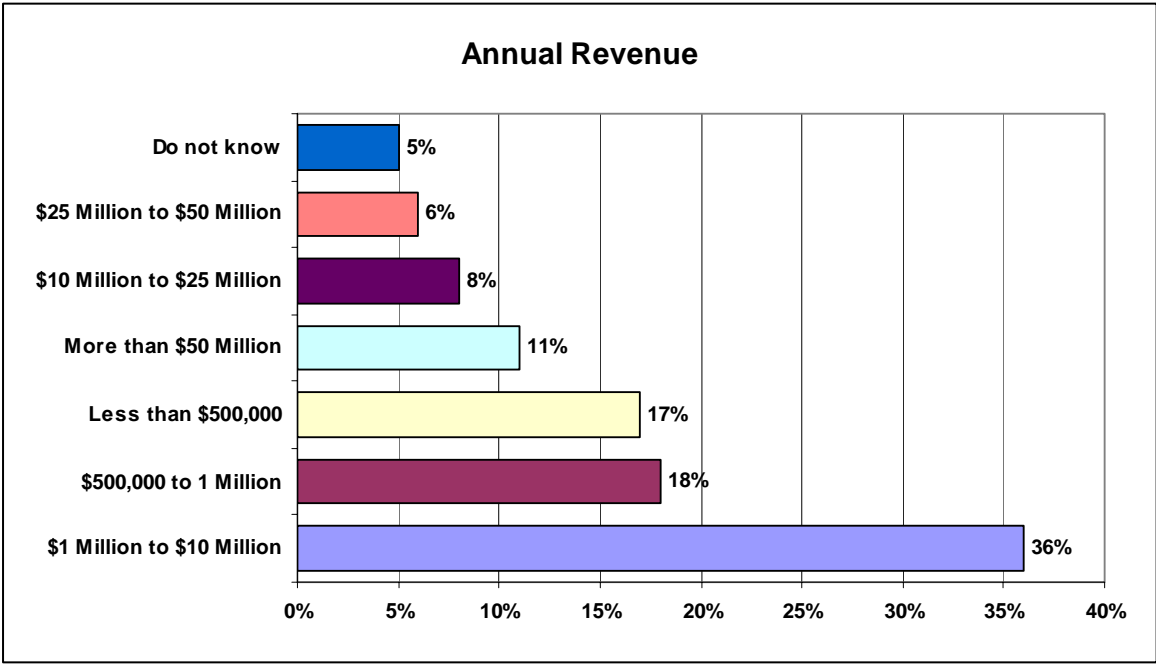
While the clear majority of respondents (36%) indicated their annual revenue fell between $1-10 Million, a combined 35% of respondents indicated they made less that $1 Million annually – realizing an almost equal split among those who made in the top and lower halves of that figure. The chart below more fully explores these results

Comparison of Revenue Vs. Time in Operation

Legend:
- Less than one year
- 1 to 5 years
- 6 to 10 years
- 10 to 20 years
- More than 20 years

Y-axis: % of Respondents
X-axis: Annual Revenue (Less than $500,000; $500,000 to 1 Million; $1 Million to $10 Million; $10 Million to $25 Million; $25 Million to $50 Million; More than $50 Million; Do not know)
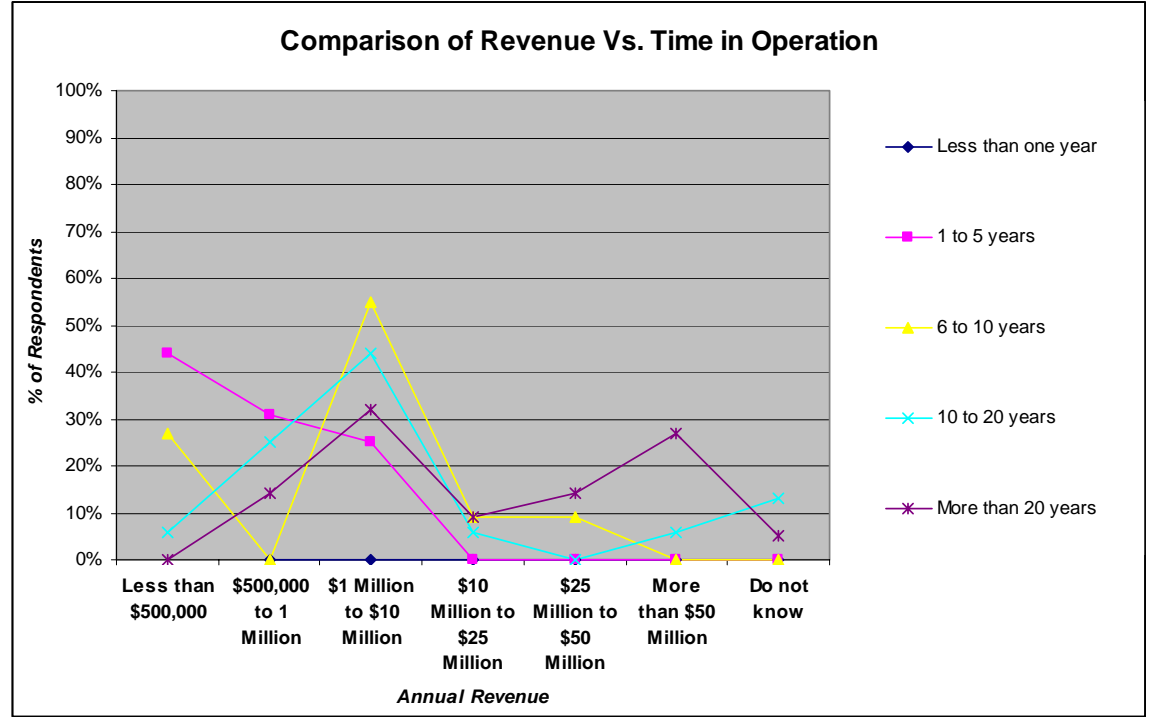
The chart on the preceding page demonstrates a comparison of annual revenue versus years in operation to gain a clearer picture of how revenue might be impacted by length of time in the market. The results do reveal a pattern of younger companies realizing revenues in the lower end of the revenue stream and older companies being the only ones to break the higher stratum of revenue figures.
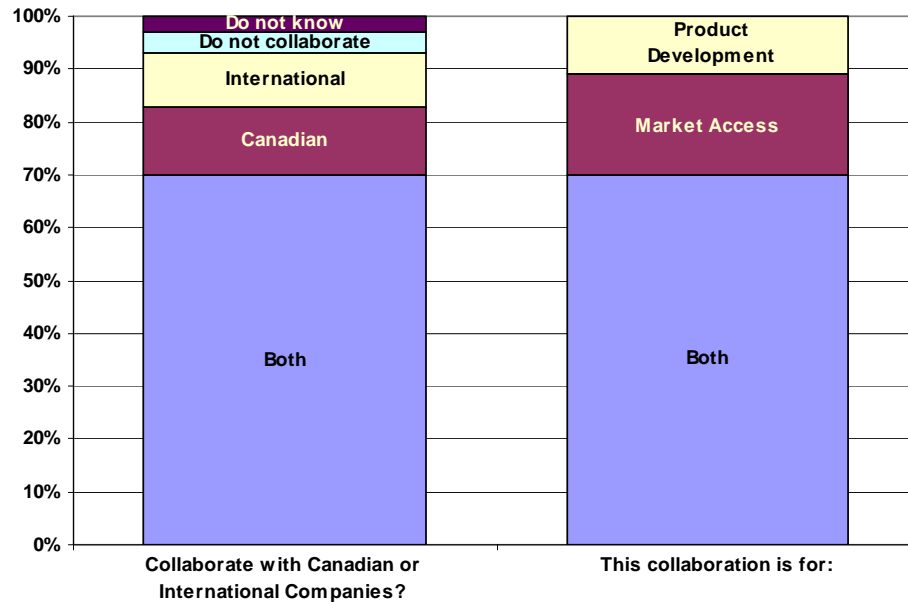
The vendors supplying products and services to the First Responder community are clearly open to forming partnerships. The graphic above demonstrates that 70% of respondents collaborate with both Canadian and International companies and the same per cent do this for both Market Access and Product Development purposes. Only 4% of respondents indicated they do not collaborate at all and an impressive total combined 93% indicated their firm collaborated with both or either types of companies.

Clients and Markets

Who are the clients?
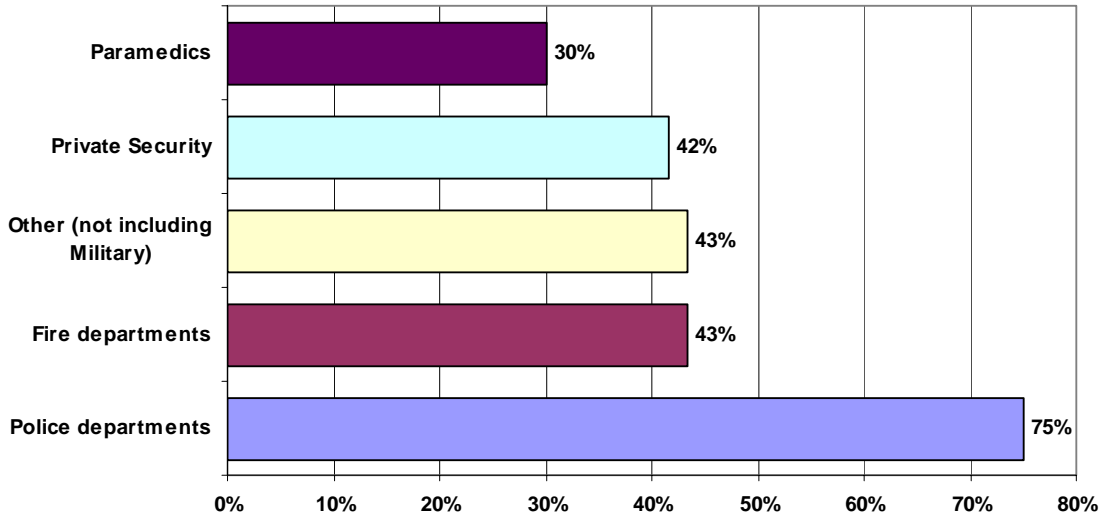
As demonstrated above, 75% of respondents indicate they provide services to Police departments while Fire Departments, Private Security, and "Other" clients were identified by more that 40% of respondents as being clients. Note that the "Other" responses provided were primarily government and crown corporations, with Police Associations and Search and Rescue also forming part of the response.

Government or Military Clients
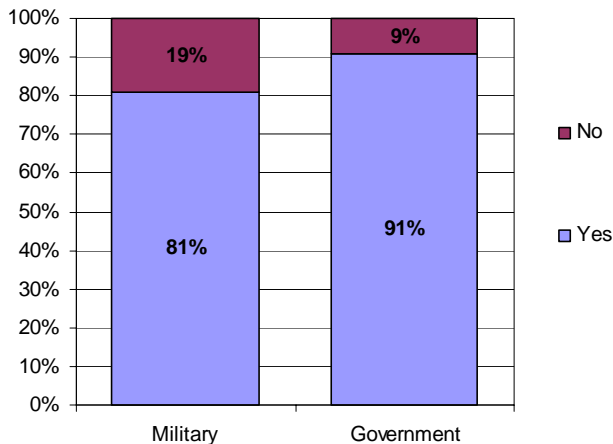
Clearly, both government and military clients are important consumer bases for this portion of the vendor community, with 8 of every 10 respondents indicating they have military clients and 9 of 10 indicating they sell to the government (any level).

% of Products/Services Sold to Military Clients

n = 29
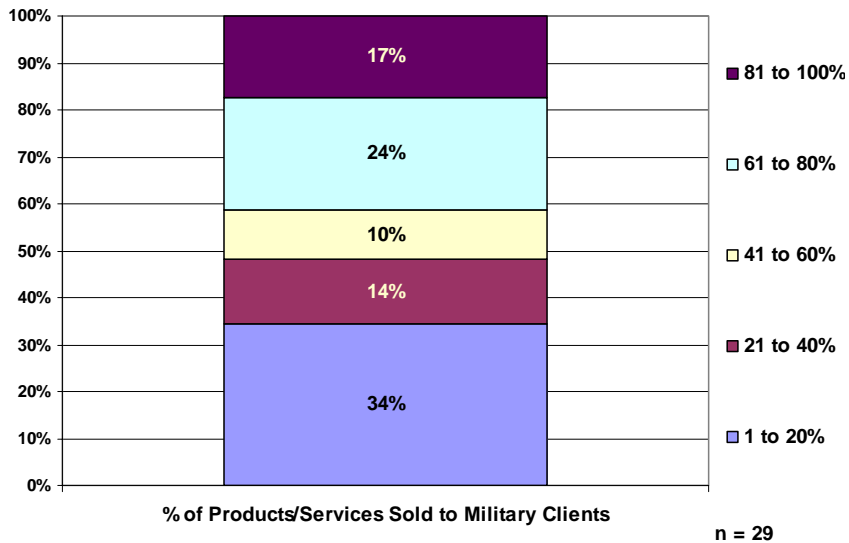
With respect to the percent of sales sold into the military market, as detailed in the chart above, the majority of respondents (34%) only sell between 1 to 20% of their products to this client base. However, in aggregate, nearly as many sell up to 50% of their products/services to this client as those who claim more than half of their sales are to military clients. The average response provided was 45 and the median was 47.
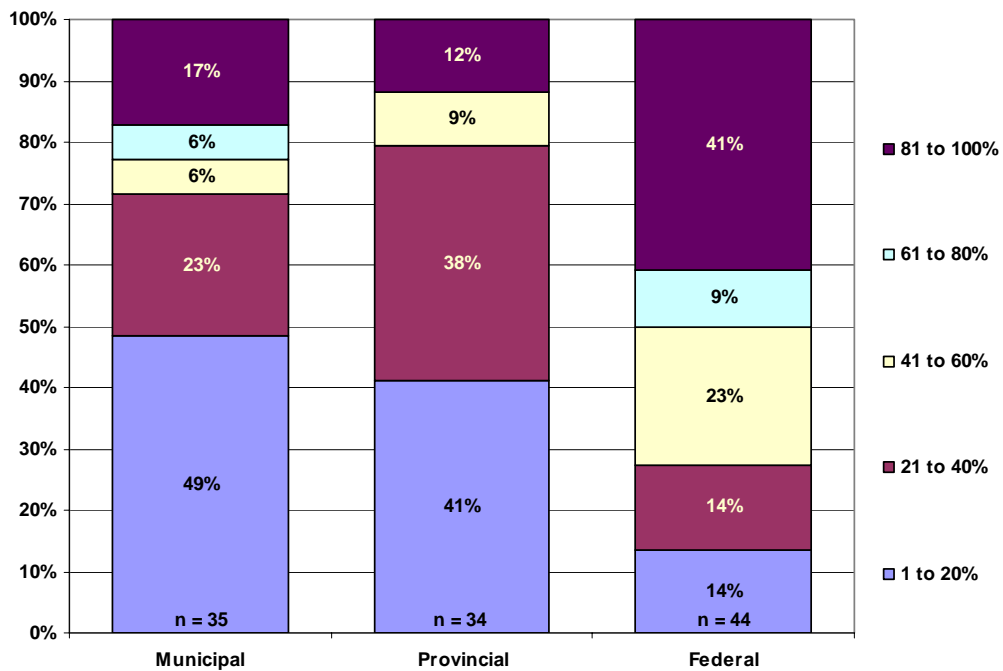
Respondents were asked: *Out of 100% of your government client base, how would you proportion out the amount of product/service each of the three levels consumes?* The chart above provides the breakdown of this response.

As the results reveal, the majority of sales are to the Federal government with 41% of respondents indicating that 81-100% of their government client sales are to this level. Provincial governments are the next largest consumer with 38% of respondents indicating that 21-40% of sales are generated at this level and Municipal governments are clearly on the lower end of the scale with almost half of all respondents indicating that only 1-20% of sales are realized here.

The table below provides the average and median results for each of the three government levels. Note that the average count for municipal results reflects a slightly higher average than that of the provincial results even though the aggregate distributions clearly show Provincial governments receiving a larger overall share. This is due to the slightly larger number of those who indicated having 80-100% of sales at the Municipal level compared to those who claimed the same levels with Provincial clients.

	Average (%)	Median (%)
Municipal	32	20
Provincial	27	20
Federal	60	55
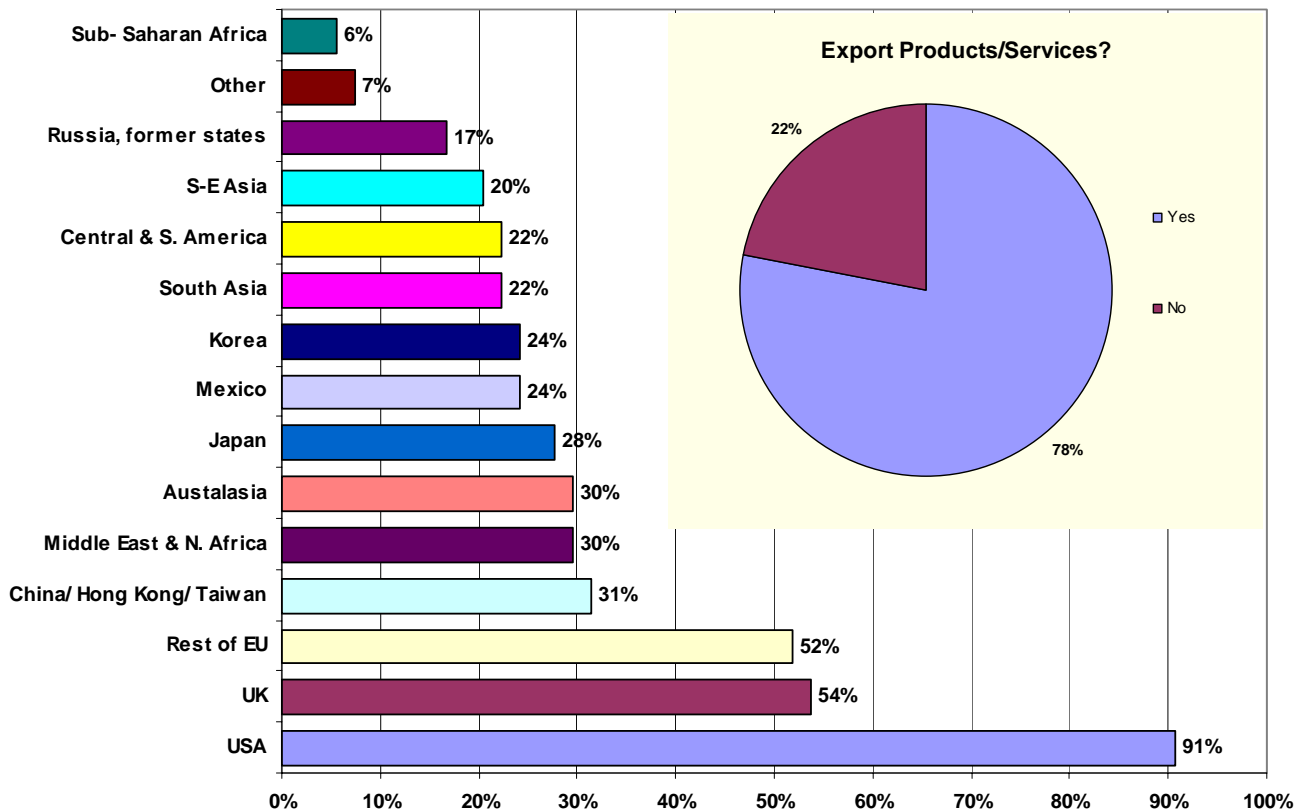
The charts on the previous page reveal that more than ¾ of companies are active exporters and fully 91% are exporting to the States. The U.K and the rest of the E.U. are also popular export locations with over half of all respondents indicating as such. Sub-Saharan Africa was the least identified market at with only 6% of company's exporting to this region. "Other" responses here were of the "Worldwide" nature.

Product Development and Marketing

Respondents were asked if they partnered and/or directly collaborated with First Responders in the development of their products and/or services. As revealed by the chart below, 64% identified they had done so. Of those respondents who had not or did not know if such a collaboration had taken place, almost ¾ (72%) indicated they would do so if provided with the opportunity while only 8% said they would not.

Attended a Trade Show?

- Attended both Canadian and foreign
- Attended Canadian only
- Never attended
- Attended foreign only

1%

12%

15%

72%
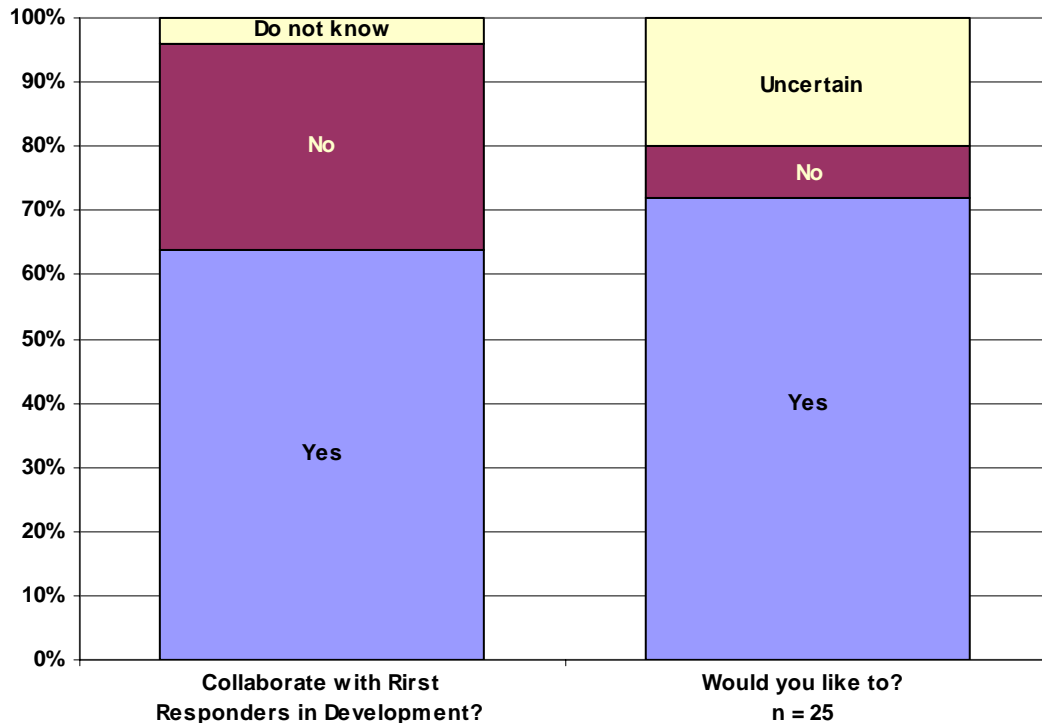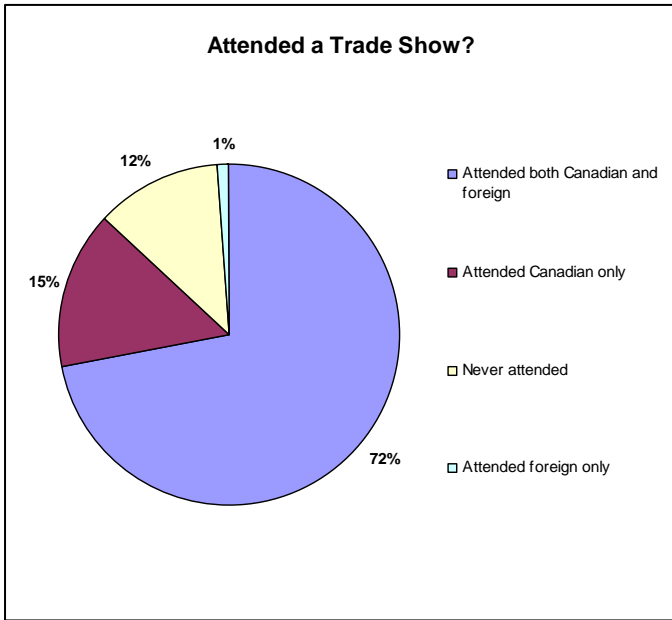
With respect to respondents' participation in Trade Shows, 88% of respondents have attended such an event, with 72% indicating they have attended both Canadian and foreign-based shows.

Importance of Trade Show Outcomes

Legend:
- No Opinion
- Not Important
- Somewhat Important
- Important
- Very Important
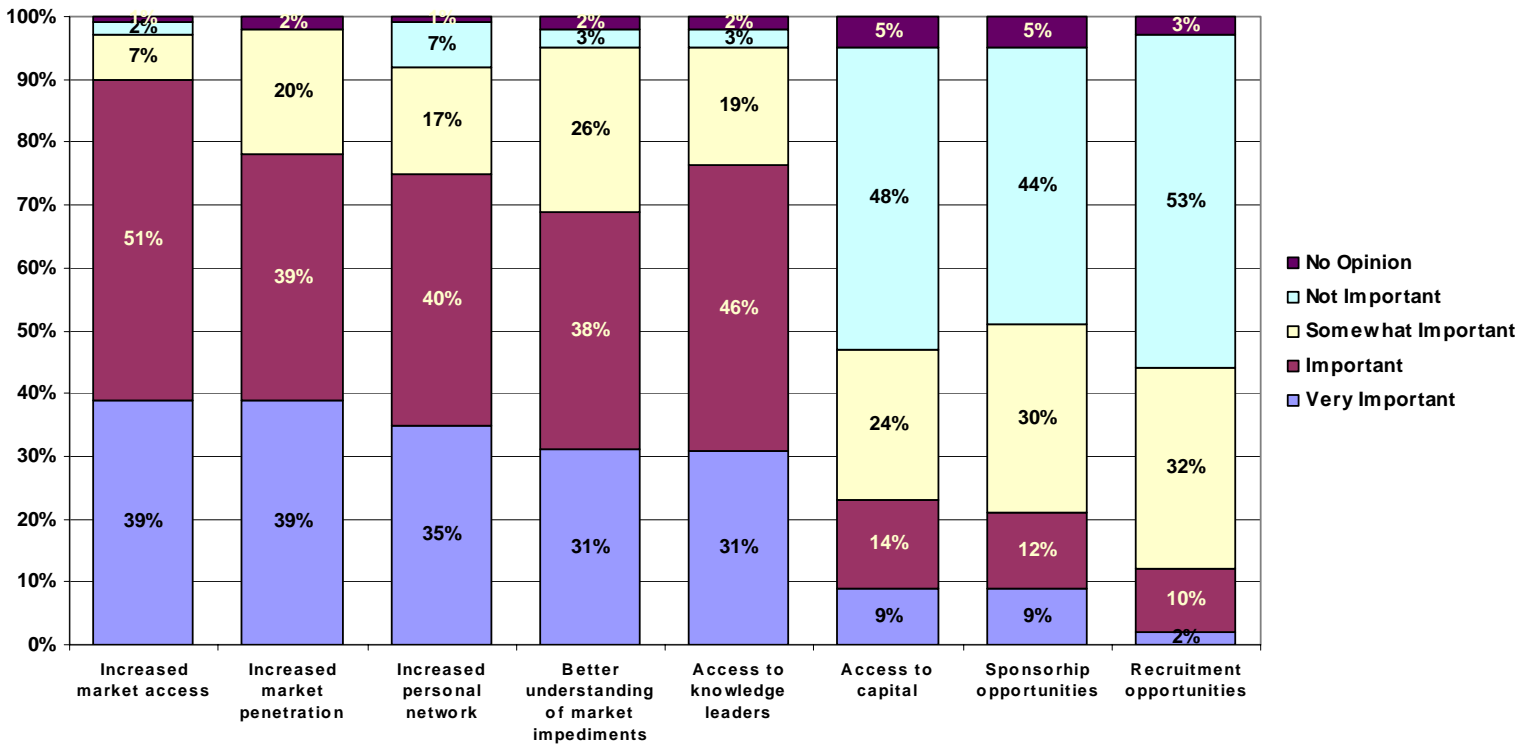
Respondents were asked to rate the importance of a number of trade show outcomes. The chart above reveals:

- Increasing market share the primary goal – respondents rate Increasing Access (90%) and Penetration (78%) as either *Very Important* or *Important*

- Increased networking was the second highest goal – respondents included Access to Knowledge Leaders (77%) and Increased Personal Networks (75%) as *Very Important* or *Important* outcomes

- Trade shows are clearly not perceived to be considered important ways to recruit new employees (53% *Not important* rating – only 2% *Very Important*) or recruit investors or new capital (48% *Not important* rating – Only 9% *Very Important*)

- Sponsoring such events are also not high on the Importance scale with slightly less than half (44%) identifying this as *Not Important*.

Respondents were asked to elaborate on their responses. The majority of the comments reinforced the findings above, in that Networking, increasing Product/Brand awareness, and the exchange of ideas/information were the primary strengths of trade shows. A handful of comments indicated that trade shows were not useful or their usefulness being reassessed in light of low lead or sales returns.

Role of Government
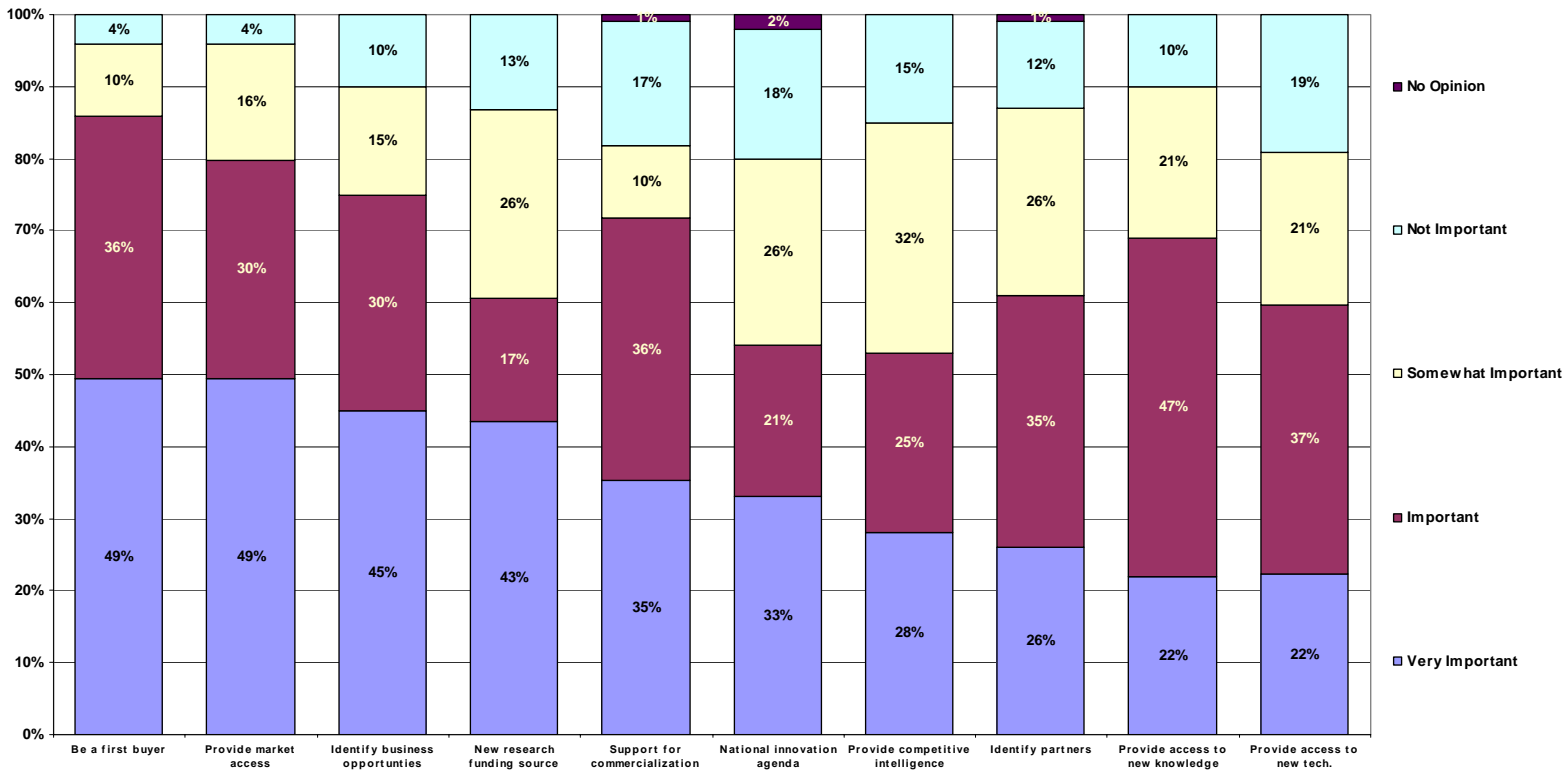
Respondents were asked to rate the importance of a provided list of actions the government could take to enable their company to remain competitive and in operation. As the chart on the previous page reveals:

- Being a first buyer was the highest rated overall, with almost half of all respondents indicating that this was *Very Important* and a combined 85% feeling this was *Very Important* or *Important*.

- The second set of priorities related to increasing business through assisting them in gaining market access (79% combined *Very Important* and *Important* ratings) and Identifying business opportunities (75% combined *Very Important* and *Important* ratings)

- Providing access to new technology and the Creation of a National Innovation Agenda received the highest per cent of *Not important* ratings, scoring 19% and 18% respectively

- It should be noted that all elements received 80% or higher in combined *Very Important, Important* or *Somewhat Important* ratings – indicating the need for continued and sustainable collaboration between the government and industry players

Mandate for the CPRC

Awareness of CPRC

- Not at all familiar
- Somewhat familiar
- Familiar
- Very familiar

4%
17%
57%
22%
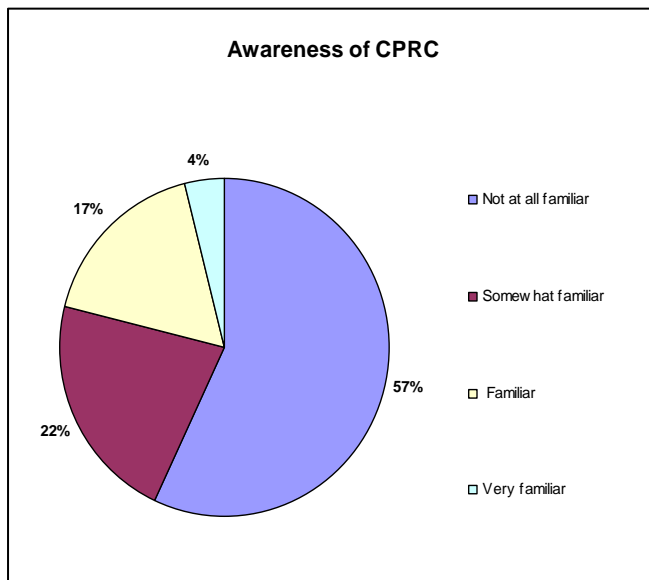
As revealed in the chart to the right, many organizations are not aware of the CPRC, with 57% of the sample claiming to be *Not at all familiar* with the organization. In fact, only 4% of respondents indicated being *Very familiar* with the CPRC. However, in light of this assessment initiative and the resulting report, one can safely assume that this awareness level will likely increase. That said, significant efforts in the branding and profile raising of the CPRC is clearly required.

Importance of New Research Centre Services
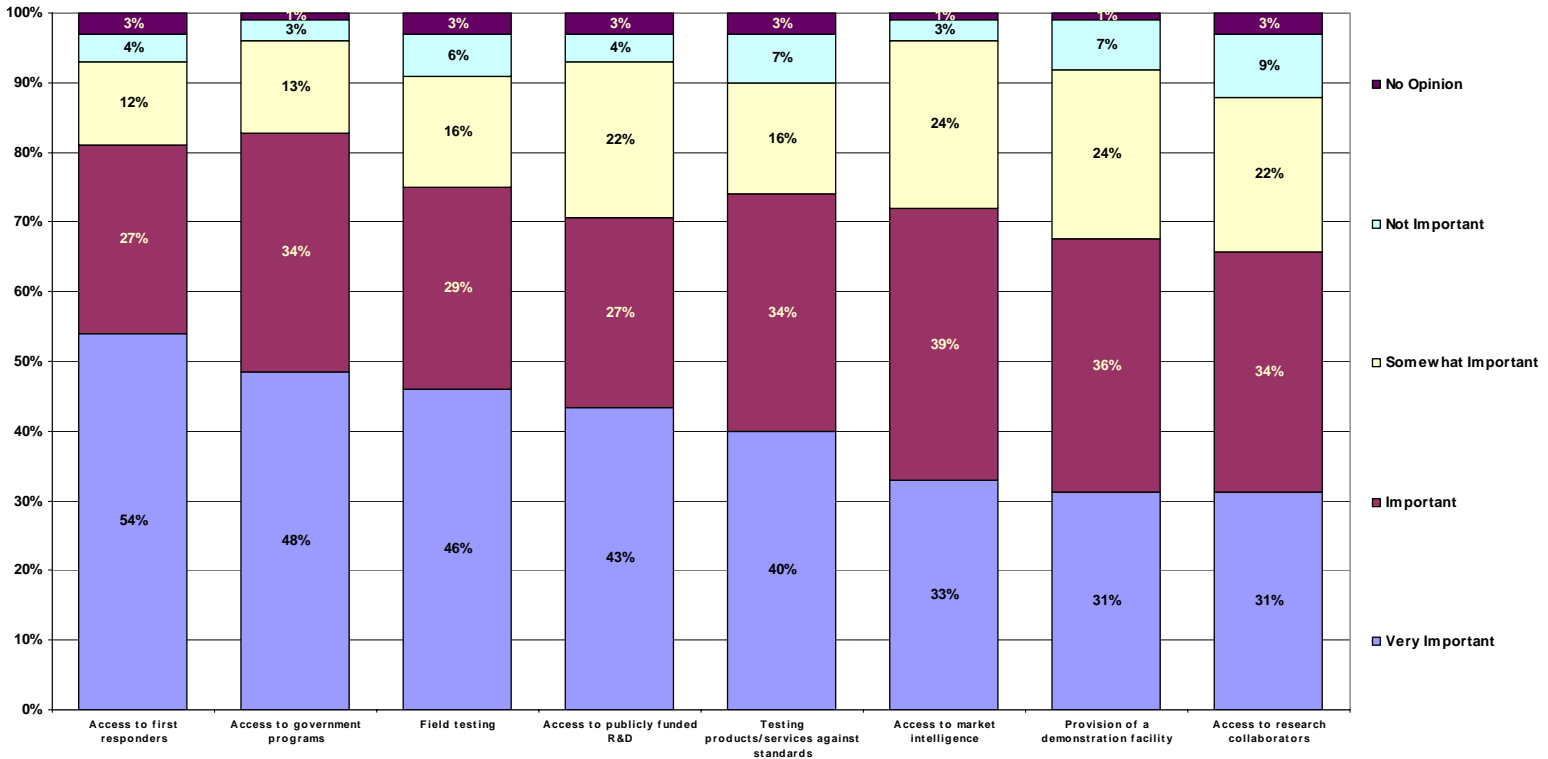
Respondents were asked to rate the importance of a provided list of services the CPRC could offer from its new facilities. As the chart above reveals:

- Providing Access to first responders was rated the most important overall with more than half of all respondents indicating this was *Very important*

- Access to government programs was the second-rated element overall with slightly less than half of all respondents indicating this was *Very Important*

- Field testing and Testing products against standards were also very highly rated, receiving a combined *Very Important* and *Important* rating of 75% and 74% respectively

- *Not Important* ratings are fairly negligible across all elements – with Access to Research collaborators receiving the highest per cent (9%) of *Not Important* ratings

- Should be again noted that all elements considered important overall, with the majority of these areas receiving 90% combined *Very Important, Important* and *Somewhat Important* ratings.

Respondents were then asked to prioritize each of these elements in order of their importance to them.
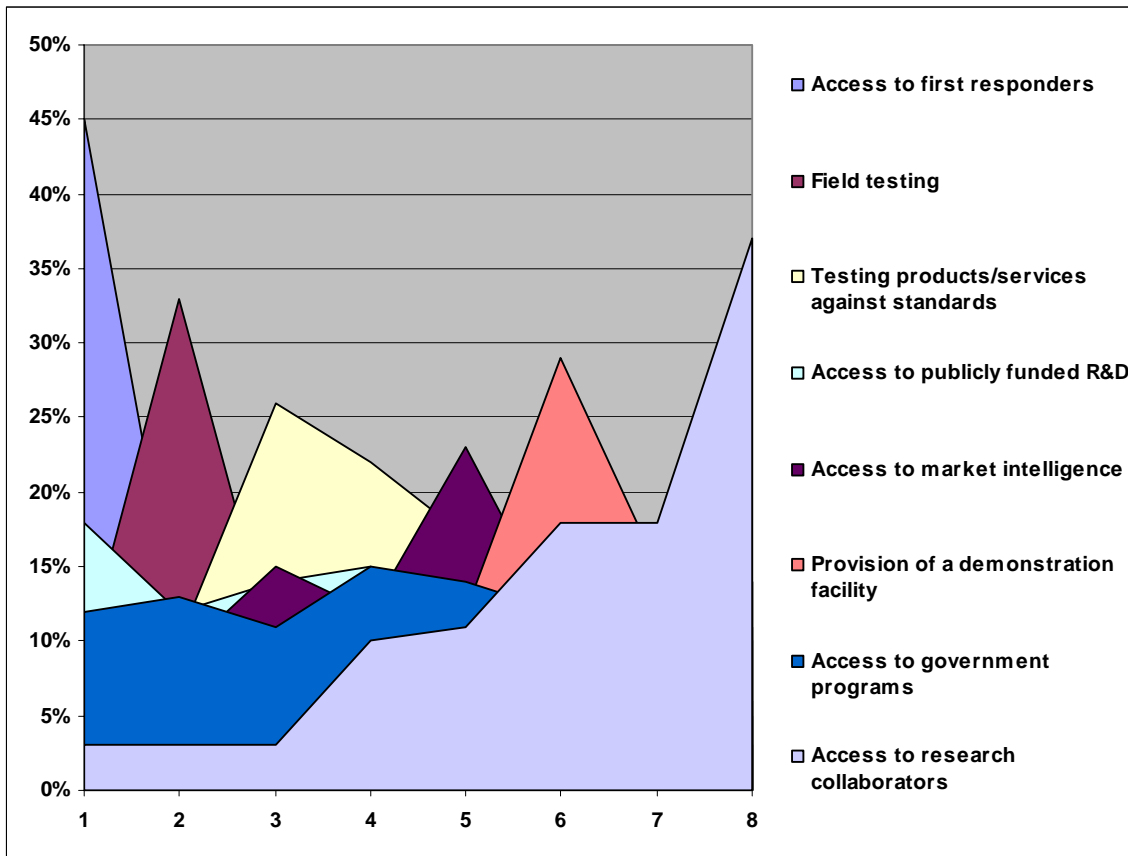
The chart above demonstrates the priorities quite clearly – comparing this to a mountainous range whereby the peaks to the left and deepest in range reflect the most sought after priorities and the ranges nearest to the foreground and highest to the right demonstrate the lowest set.

As such, the highest priorities reflect the importance ratings found in the previous results: *Access to first responders* and *testing* (in the field and against standards) are the highest sought after priorities and *Access to research collaborators* the lowest.

It is interesting to note that while *Access to government* programs was a highly rated component in the previous results, when forced to rank these same areas, it falls significantly to the bottom of the list.

However, one can assume that as all of these areas did enjoy rather strong results overall in the rated question, only shades of grey separate these as priorities as well.

Participate in Standards Development

- 22%
- 7%
- 71%

Legend:
- Yes
- No
- Not certain at this time
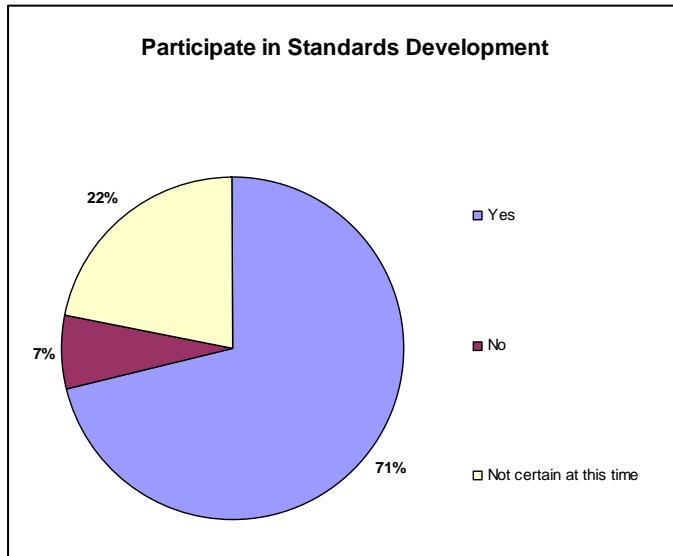
The final closed-ended question asked respondents if they would be interested in participating in the standard development process – a part of CPRC's mandate. As revealed in the chart to the left, a clear majority of respondents (71%) indicated they would be interested in this opportunity.

This provides an excellent opportunity for the CPRC to capitalize on with respect to the need to increase its profile among the vendor community.

Respondents were then provided with an opportunity to provide open comments regarding over services they might like to see offered in the new facilities. Perhaps because of the comprehensiveness of the questions already asked, few additional remarks were provided. Some suggestions included:

- Identification of newly recognized threats as well as allow us to participate in the formulation of migration approaches for those threats.

- Provision of a demonstration lab

- Hosting International Demonstrations of Canadian products

- Act as liaison to promote R & D involving police forces such as the RCMP and provide the "police " input.

- Open up test beds to evaluate new products and designs

- Consultation services in developing joint funding between customer, government and ourselves

- Help in coordinating SOP or standard operating procedures for use with selected or recommended equipment

- Value added product offerings to all their affiliate members. To increase buying power and costs sharing programs
- Referral services to prospective clients and advise seekers

Conclusions

This assessment has clearly identified a series of priorities for the CPRC and the proposed new research centre.

The key priority in fact is that of needing to raise the profile of the CPRC itself and in doing so, can provide a concurrent opportunity of promoting the mandate and vision of the new centre as well.

The fact that so few vendors readily identified being familiar with the CPRC speaks to an urgent need for an effective promotion and branding campaign. The planned formation of the new centre provides an excellent opportunity to create greater awareness of the CPRC and any promotion and marketing campaign developed for the announcement of this Centre should also take into direct consideration a means of raising CPRC's mandate as a whole.

This can also be accomplished, in part, with the proper promotion and distribution of this report – especially among those who have requested to be contacted regarding their potential participation in the development of standards, or were simply interested in receiving a copy of these results.

With respect to the priorities for the new centre itself, the top three would be:

1. Providing greater access and facilitating collaboration between the vendor and First Responder communities with respect to co-development and promotion of their products and services

2. Provision of field testing opportunities to the vendor community

3. Providing vendors an opportunity to test products/services against set standards – invite them to assist in the development of said standards

With respect to vendor messages on government support, the clear need is for the government to continue to commit itself as a first buyer and helping to grow their businesses through assistance in helping them to gain market access and identifying business opportunities.

In terms of providing vendors with trade show opportunities and space in the new centre, the CPRC should ensure that these events provide vendors with two key

outcomes: 1) an opportunity to increase market share and penetration; and 2) provide strong networking opportunities between vendors, prospects, and knowledge leaders.

Finally, given the substantive lack of data on this vendor community, it is highly recommended that a comprehensive study be undertaken that identifies to the fullest extent possible: who these vendors are; the products and services they offer; and, what specific industry trends, challenges, and business environment exists.

Gaining a better understanding of the above will provide the CPRC with a much more focused audience to target in its branding and promotion activities, and potentially create a greater client base for them to pursue with respect to the Centre's proffered services and activities.

Appendix A – Assessment Questions

Preamble

Welcome to the CPRC Needs Analysis!

The Canadian Advanced Technology Alliance (CATA) in partnership with the Canadian Police Research Centre (CPRC) is conducting a needs analysis to determine its research priorities and what related services you feel the CPRC could provide to strengthen your company's technology capability and competitive advantage.

COMPLETE ONLY if you are a Canadian owned and operated firm who provides products or services to First Responders. Throughout this analysis, First Responder is defined as first response emergency services such as fire, police and paramedics.

Please submit your response before the deadline of March 17, 2006.

For further information on the CPRC please visit our website at www.CPRC.org or by contacting Steve Palmer, Executive Director, Canadian Police Research Centre by e-mail at spalmer@cprc.org.

1. Where is your organization located?
   a. Alberta
   b. British Columbia
   c. Manitoba
   d. New Brunswick
   e. Newfoundland and Labrador
   f. Northwest Territories
   g. Nova Scotia
   h. Nunavut
   i. Ontario
   j. Price Edward Island

k. Quebec

l. Saskatchewan

m. Yukon

2. Approximately how many people does your organization employ?

    a. 1 to 10

    b. 11 to 50

    c. 51 to 500

    d. 500 or more

    e. Do not know

3. Which one of the following categories best describes your company's main product or service?

    a. Emergency/Management consulting

    b. Investigative equipment provider

    c. IT/ICT

    d. Medical equipment/services

    e. Protective equipment provider

    f. Surveillance equipment provider

    g. Other

4. Approximately how long has your organization been in operation?

    a. Less than one year

    b. 1 to 5 years

    c. 6 to 10 years

    d. 10 to 20 years

    e. More than 20 years

5. What is your organization's approximate annual revenue?

    a. Less than $500,000

    b. $500,000 to 1 Million

    c. $1 Million to $10 Million

d. $10 Million to $25 Million

e. $25 Million to $50 Million

f. More than $50 Million

g. Do not know

6. Do you collaborate with other Canadian or international companies?

a. Canadian

b. International

c. Both

d. Do not collaborate

e. Do not know

7. Is this collaboration for:

a. Market access

b. Product development

c. Both

8. Which of the following groups are currently clients of your company?

a. Police departments

b. Fire departments

c. Paramedics and emergency medical services

d. Private Security

e. Other (not including Military)

9. Does your company sell its products/services to the military?

a. Yes

b. No

c. Do not know

10. Approximately what per cent of your products or services are sold to military sector clients? If you do not know, please leave blank.

11. Do you partner and/or directly collaborate with First Responders in the development of your products and/or services?

    a. Yes

    b. No

    c. Do not know

12. Would you like to have the opportunity of working directly with First Responders in the development of your products and/or services?

    a. Yes

    b. No

    c. Not certain at this time

13. Does your company export its products/services?

    a. Yes

    b. No

14. Where does your company export to? Select all that apply.

    a. USA

    b. Mexico

    c. UK

    d. Rest of EU

    e. Russia, former states of Soviet Union

    f. Middle East and North Africa

    g. South Asia

    h. South East Asia

    i. China/ Hong Kong/ Taiwan

    j. Korea

    k. Japan

    l. Austalasia

    m. Central and South America

    n. Sub- Saharan Africa

    o. Other

15. With respect to trade shows, have you:

     a. Attended Canadian-base shows only

     b. Attended foreign-based shows only

     c. Attended both Canadian and foreign-based shows

     d. Never attended a trade show

16. In your opinion, how important are the following trade show outcomes:

   Scale: *Very Important*
             Important
             Somewhat Important
             Not Important
             No Opinion

     a. Better understanding of market impediments

     b. Increased market access

     c. Access to capital

     d. Increased market penetration

     e. Access to knowledge leaders

     f. Recruitment opportunities

     g. Increased personal network

     h. Sponsorship opportunities

17. Please briefly explain how you feel trade shows can be most beneficial to you.

18. Do you have government (any level) clients?

     a. Yes

     b. No

     c. Do not know

19. Out of 100% of your government client base, how would you proportion out the amount of product/service each of the three levels consumes? If 0% please indicate as such. If you do not know, please leave blank.

   % Municipal   ____

   % Provincial   ____

   % Federal   ____

20. Please rate the importance to you regarding the following actions the government can take to enable your company to remain competitive and in operation.

   Scale: *Very Important*
                Important
                Somewhat Important
                Not Important
                No Opinion

   a. Be a first buyer

   b. Act as a funding source for new research

   c. Identify partners

   d. Provide access to new knowledge

   e. Provide access to new technologies

   f. Provide competitive intelligence

   g. Provide market access

   h. Support for commercialization process

   i. Develop a national innovation agenda

   j. Identify National and International business opportunities

21. How familiar are you currently with the Canadian Police Research Centre?

   a. Very familiar

   b. Familiar

   c. Somewhat familiar

   d. Not at all familiar

22. In creating a new research centre, a number of possible services can potentially be made available. Please rate the level of importance of the following services:

Scale: *Very Important*
Important
Somewhat Important
Not Important
No Opinion

    a. Access to first responders

    b. Field testing

    c. Testing products/services against standards

    d. Access to publicly funded R&D

    e. Access to market intelligence

    f. Provision of a demonstration facility

    g. Access to government programs

    h. Access to research collaborators

23. Please rank these in order of their priority of importance to you, with '1' indicating the highest priority and '8' indicating the lowest priority.

    a. Access to first responders

    b. Field testing

    c. Testing products/services against standards

    d. Access to publicly funded R&D

    e. Access to market intelligence

    f. Provision of a demonstration facility

    g. Access to government programs

    h. Access to research collaborators

24. A part of the CPRC's new mandate will be to establish new product standards. Would you be interested in participating in this process?

    a. Yes

    b. No

    c. Not certain at this time

25. Are there any other services that you would like to see the CPRC offer?

Thank you for your participation!

If you would like to receive a copy of the results of this analysis or would like to hear more about the developments around the Canadian Police Research Centre (CPRC), please leave your contact information below.

Name:

Title:

E-Mail:

Phone:

Thank you!

Note: *As this information is being collected under the authority of the Privacy Act, the government will only receive the final results of the study in the form of a report, which will contain non-identifying aggregate information. The government will receive the names of participants only in cases where respondents have provided their contact information in order to be kept informed on this initiative. Even in these cases, respondent names will not be linked to their responses.*

Appendix B – Invitation to Respond

Good afternoon,

You are receiving this invitation as a registered member of CATAAlliance's Advanced Security Profile database.

The Canadian Police Research Centre has asked CATA to conduct a Needs Assessment of Canadian advanced security companies to help determine the research priorities and related services the CPRC could provide in their proposed new facilities towards strengthening your competitive advantage.

More information can be found in the CATA announcement located here:

http://www.cata.ca/Media_and_Events/Press_Releases/cata_pr02210602.html

If your firm sells product and services to First Responder organizations (fire, police, ambulance, military), then click on the link below to complete the assessment before March 17. All respondents who complete the assessment will receive a complimentary copy of the final report.

LINK TO ONLINE ASSESSMENT

If your firm does not provide services to this community, please take a quick moment to respond to this e-mail with only the message "Does not apply" as the response. This will ensure you do not receive future notices of participation in this assessment and allow us to better capture an appropriate sample for this initiative.

Thank you in advance for your response to the assessment or this e-mail.

Appendix C – CATA*Alliance* News Release

Strengthening Canada's Front Lines in Emergency Response --

Needs assessment of advanced security vendor's research priorities to help establish new research centre's mandate

Ottawa, Ontario - February 21, 2006: An online needs assessment targeting the advanced security companies who provide products and services to Canada's First Responder Community - the nation's Police, Fire, Paramedics and Military personnel - is being launched today by CATA*Alliance* and the Canadian Police Research Centre (CPRC). The assessment is to help determine the research priorities and related services the CPRC could provide in their proposed new facilities to strengthen the competitive advantage of Canadian companies.

> **ACTION ITEM:**
> If your firm sells products and services to first responder organizations (fire, police, ambulance, military) and you are not yet registered to our Advanced Security database - please contact Muriel Debroy with your company's name, brief corporate profile, and contact information *before March 17, 2006* to participate in this needs assessment.

"We have a unique opportunity to reach out to the vendor community to determine what kind of research and related services we can offer Canadian vendors and the priority or level of need for each. We will then use this information to design programs to address these needs." explains CPRC Executive Director, **Steve Palmer**.

"CPRC provides vendors an opportunity to access and work alongside first responders in the early stages of product development including field testing and testing products and services against established standards," says Mr. Palmer. "This assessment will help us determine what the vendors' needs are and how we can help."

About the Canadian Police Research Centre (CPRC)

The Canadian Police Research Centre (CPRC) is a partnership among the National Research Council Canada, Canadian Association of Chiefs of Police, and the Royal Canadian Mounted Police. It is staffed by personnel from the RCMP and the National

Research Council (NRC), and is governed by an independent advisory board made up of representatives from police and other related organizations from across Canada.

The CPRC serves as a single, national focal point for technology research and development efforts in support of Canada's law enforcement community. By promoting innovation and cooperation between the police community, governments, industry, universities, and other research organizations, the CPRC strives to ensure that the best possible resources are made available to police and related organizations in a cost-efficient and timely manner. You can receive the latest information on CPRC, its research projects, technology partners and business opportunities through the monthly e-magazine "CPRC Update".

To receive the "CPRC update" simply follow this link
http://www.cprcupdate.org/index.php?id=177

The assessment is being conducted until **March 17, 2006** by invitation only to the 1000 plus firms registered to the CATA*Alliance* Advanced Security Database. If your company provides products and/or services to First Responder organizations and should be included in this assessment, please contact Muriel Debroy via e-mail at mdebroy@cata.ca that includes your company's name, brief corporate profile, and contact information before the deadline of March 17.

"CPRC selected CATA*Alliance* to conduct this assessment based upon our proven track record in performing these sector-specific studies and because we are the only organization to have engaged the advanced security industry with any thoroughness," explains CATA*Alliance* VP Research, **Kevin Wennekes**. "We have long been an advocate for the firms in this sector and the matters of national security are a clear priority to us, as demonstrated in the recent security recommendations we released and our extensive support for the upcoming Canadian Aviation Security Conference."

More information on the recent national security recommendations can be found here:
http://www.cata.ca/Media_and_Events/Press_Releases/cata_pr01250601.html

More information on the Canadian Aviation Security Conference can be found here:
http://www.cata.ca/CanadianAviationSecurityConference/about.html

A repository of public security company profiles was compiled through a 2003 study available for download here:
http://www.cata.ca/HomelandSecurity/AdvSecIndProfile.html

Appendix D – CPRC Web Announcement

General Announcements:

Needs assessment of advanced security sector

An online needs assessment targeting the advanced security companies who provide products and services to Canada's First Responder Community - the nation's Police, Fire, Paramedics and Military personnel - is being launched today by CATAAlliance and the Canadian Police Research Centre (CPRC). The assessment is to help determine the research priorities and related services the CPRC could provide in their proposed new facilities to strengthen the competitive advantage of Canadian companies.

If your firm sells products and services to first responder organizations (fire, police, ambulance, military) and you are not yet registered to our Advanced Security database - please contact Muriel Dubroy with your company's name, brief corporate profile, and contact information before March 17, 2006 to participate in this needs assessment.

For further information go to CATA Alliance

Posted By Site Admin on 2006-03-07 04:14:26.0 | General Announcements

Appendix E – Detailed Assessment Results

	Count	Percent
Where is your organization located?		
Alberta	8	13%
British Columbia	9	14%
Manitoba	1	2%
Ontario	34	54%
Quebec	8	13%
Saskatchewan	3	5%
Total	**63**	**100%**
Approximately how many people does your organization employ?		
1 to 10	26	38%
11 to 50	23	34%
51 to 500	13	19%
500 or more	6	9%
Total	**68**	**100%**
Which one of the following categories best describes your company's main product or service?		
Emergency/Management consulting	4	6%
Investigative equipment provider	4	6%
IT/ICT	17	26%
Medical equipment/services	2	3%
Protective equipment provider	12	18%
Surveillance equipment provider	10	15%
Other	16	25%
Total	**65**	**100%**

	Count	Percent
Approximately how long has your organization been in operation?		
Less than one year	1	1%
1 to 5 years	16	24%
6 to 10 years	11	16%
10 to 20 years	17	25%
More than 20 years	23	34%
Total	**68**	**100%**
What is your organization's approximate annual revenue?		
Less than $500,000	11	17%
$500,000 to 1 Million	12	18%
$1 Million to $10 Million	24	36%
$10 Million to $25 Million	5	8%
$25 Million to $50 Million	4	6%
More than $50 Million	7	11%
Do not know	3	5%
Total	**66**	**100%**
Do you collaborate with other Canadian or international companies?		
Canadian	9	13%
International	7	10%
Both	48	70%
Do not collaborate	3	4%
Do not know	2	3%
Total	**69**	**100%**
Is this collaboration for:		
1. Market access	12	19%
2. Product development	7	11%
3. Both	44	70%
Total	**63**	**100%**

	Count	Percent
Which of the following groups are currently clients of your company?		
Police departments	45	75%
Fire departments	26	43%
Paramedics and emergency medical services	18	30%
Private Security	25	42%
Other (not including Military)	26	43%
Total Respondents	**60**	
Does your company sell its products/services to the military?		
Yes	56	81%
No	13	19%
Total	**69**	**100%**
Approximately what per cent of your products or services are sold to military sector clients?		
1 - 10	6	21%
11 - 20	4	14%
21 - 31	4	14%
31 - 41	0	0%
41 - 51	3	10%
51 - 61	0	0%
61 - 71	3	10%
71 - 81	4	14%
81 - 91	1	3%
91 - 100	4	14%
Total	**29**	**100%**
Average:	**47**	
Median:	**45**	

	Count	Percent
Do you partner and/or directly collaborate with First Responders in the development of your products and/or services?		
Yes	44	64%
No	22	32%
Do not know	3	4%
Total	**69**	**100%**
Would you like to have the opportunity of working directly with First Responders in the development of your products and/or services?		
Yes	18	72%
No	2	8%
Not certain at this time	5	20%
Total	**25**	**100%**
Does your company export its products/services?		
Yes	54	78%
No	15	22%
Total	**69**	**100%**

	Count	Percent
Where does your company export to?		
USA	49	91%
Mexico	13	24%
UK	29	54%
Rest of EU	28	52%
Russia, former states of Soviet Union	9	17%
Middle East and North Africa	16	30%
South Asia	12	22%
South East Asia	11	20%
China/ Hong Kong/ Taiwan	17	31%
Korea	13	24%
Japan	15	28%
Austalasia	16	30%
Central and South America	12	22%
Sub- Saharan Africa	3	6%
Other	4	7%
Total Respondents	**54**	
With respect to trade shows, have you:		
Attended Canadian-base shows only	10	15%
Attended foreign-based shows only	1	1%
Attended both Canadian and foreign-based shows	50	72%
Never attended a trade show	8	12%
Total	**69**	**100%**
Do you have government (any level) clients?		
Yes	63	91%
No	6	9%
Total	**69**	**100%**

	Count	Percent

Municipal

	Count	Percent
0 - 10 *From (incl) - to (excl)*	8	23%
10 - 20	9	26%
20 - 30	5	14%
30 - 40	3	9%
40 - 50	0	0%
50 - 60	2	6%
60 - 70	1	3%
70 - 80	1	3%
80 - 90	1	3%
90 - 100 (incl)	5	14%
Total	**35**	**100%**
Average:	**32**	
Median:	**20**	

Provincial

	Count	Percent
0 – 10 *From (incl) - to (excl)*	5	15%
10 - 20	9	26%
20 - 30	7	21%
30 - 40	6	18%
40 - 50	3	9%
50 - 60	0	0%
60 - 70	0	0%
70 - 80	0	0%
80 - 90	1	3%
90 - 100 (incl)	3	9%
Total	**34**	**100%**
Average:	**27**	
Median:	**20**	

	Count	Percent
Federal		
0 - 10 *From (incl) - to (excl)*	4	9%
10 - 20	2	5%
20 - 30	4	9%
30 - 40	2	5%
40 - 50	2	5%
50 - 60	8	18%
60 - 70	1	2%
70 - 80	3	7%
80 - 90	1	2%
90 - 100 (incl)	17	39%
Total	**44**	**100%**
Average:	**60**	
Median:	**55**	
How familiar are you currently with the Canadian Police Research Centre?		
Very familiar	3	4%
Familiar	12	17%
Somewhat familiar	15	22%
Not at all familiar	39	57%
Total	**69**	**100%**
A part of the CPRC's new mandate will be to establish new product standards. Would you be interested in participating in this process?		
Yes	49	71%
No	5	7%
Not certain at this time	15	22%
Total	**69**	**100%**

In your opinion, how important are the following trade show outcomes:					
	Very Important	**Important**	**Somewhat Important**	**Not Important**	**No Opinion**
Better understanding of market impediments	18	22	15	2	1
	31%	38%	26%	3%	2%
Increased market access	23	30	4	1	1
	39%	51%	7%	2%	2%
Access to capital	5	8	14	28	3
	9%	14%	24%	48%	5%
Increased market penetration	23	23	12	0	1
	39%	39%	20%		2%
Access to knowledge leaders	18	27	11	2	1
	31%	46%	19%	3%	2%
Recruitment opportunities	1	6	19	31	2
	2%	10%	32%	53%	3%
Increased personal network	21	24	10	4	1
	35%	40%	17%	7%	2%
Sponsorship opportunities	5	7	17	25	3
	9%	12%	30%	44%	5%

Please rate the importance to you regarding the following actions the government can take to enable your company to remain competitive and in operation.	Very Important	Important	Somewhat Important	Not Important	No Opinion
Be a first buyer	34	25	7	3	0
	49%	36%	10%	4%	
Act as a funding source for new research	30	12	18	9	0
	43%	17%	26%	13%	
Identify partners	18	24	18	8	1
	26%	35%	26%	12%	1%
Provide access to new knowledge	15	32	14	7	0
	22%	47%	21%	10%	
Provide access to new technologies	15	25	14	13	0
	22%	37%	21%	19%	
Provide competitive intelligence	19	17	22	10	0
	28%	25%	32%	15%	
Provide market access	34	21	11	3	0
	49%	30%	16%	4%	
Support for commercialization process	24	25	7	12	1
	35%	36%	10%	17%	1%
Develop a national innovation agenda	22	14	17	12	1
	33%	21%	26%	18%	2%
Identify National and International business opportunities	30	20	10	7	0
	45%	30%	15%	10%	

In creating a new research centre, a number of possible services can potentially be made available. Please rate the level of importance of the following services:					
	Very Important	**Important**	**Somewhat Important**	**Not Important**	**No Opinion**
Access to first responders	36	18	8	3	2
	54%	27%	12%	4%	3%
Field testing	31	20	11	4	2
	46%	29%	16%	6%	3%
Testing products/services against standards	27	23	11	5	2
	40%	34%	16%	7%	3%
Access to publicly funded R&D	29	18	15	3	2
	43%	27%	22%	4%	3%
Access to market intelligence	22	26	16	2	1
	33%	39%	24%	3%	1%
Provision of a demonstration facility	21	24	16	5	1
	31%	36%	24%	7%	1%
Access to government programs	32	23	9	2	1
	48%	34%	13%	3%	1%
Access to research collaborators	21	23	15	6	2
	31%	34%	22%	9%	3%

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Please rank these in order of their priority of importance to you, with '1' indicating the highest priority and '8' indicating the lowest priority								
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**
Access to first responders	30	7	10	3	5	2	1	9
	45%	10%	15%	4%	8%	3%	2%	14%
Field testing	6	23	6	6	8	5	8	2
	9%	33%	9%	9%	12%	8%	12%	3%
Testing products/services against standards	4	7	17	15	11	5	5	4
	6%	10%	26%	22%	17%	8%	8%	6%
Access to publicly funded R&D	12	8	9	10	3	7	9	9
	18%	12%	14%	15%	5%	11%	14%	14%
Access to market intelligence	3	6	10	8	15	7	9	6
	4%	9%	15%	12%	23%	11%	14%	10%
Provision of a demonstration facility	2	7	5	8	8	19	10	7
	3%	10%	8%	12%	12%	29%	15%	11%
Access to government programs	8	9	7	10	9	8	12	3
	12%	13%	11%	15%	14%	12%	18%	5%
Access to research collaborators	2	2	2	7	7	12	12	23
	3%	3%	3%	10%	11%	18%	18%	37%