

AMA Research



We put more into our research...you get more out

MARKET RESEARCH PUBLICATIONS & BESPOKE SERVICES



Market Reports & Bespoke Market Research Services in the Building, Home Improvement and Construction Industry

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AMA RESEARCH CAPABILITIES

Summary of Background and Skills

One of the UK's Foremost Specialists in Home Improvement, Construction and Environmental Industry Research

- **Owned by Barbour ABI**, high quality UK construction project leads provider.
- **High Quality Research & Analysis in two key areas – bespoke research and consultancy and published reports.**
- **Independent with over 25 years'** experience in the building, construction and environmental industries.
- 17 experienced researchers.

Bespoke Consultancy Services & Ad-hoc Research

- **Quantitative Market Size Assessment**, trends, distribution, future prospects, key factors driving change.
- **End Use Sector, Target Market Identification**, opportunities in new sectors, specification/distribution options.
- **Quantitative and Qualitative Attitudinal Research**, buying process, opinion, from direct and indirect stakeholders.
- **Supply chain audits** for building products /materials, changing channel mix, impact of Internet etc.
- **Situation assessment**, internal and external factors, SWOT and PEST analyses.
- **Qualitative Views, Installer Opinion**, feedback on product performance in specification, installation and usage.
- **Research / consultancy** for public and private sector bodies.
- **Specialist database building**, targeted sectors within the building industry, specifiers, contractors, distributors etc.

150+ Published Multi-Client Reports and Databases Covering:

- **Building and construction Products and Materials** building services, bathrooms, glazing, electrical, plumbing, decorative etc.
- **Distribution** - merchants, electrical wholesalers, garden centres etc.
- **Sustainability** – energy efficient products, renewables, waste, etc.
- **Buying process** – Decision Making process, key influencers etc.
- **Outsourcing** - FM, waste management, Contract Cleaning etc.
- **Prefabrication, PFI Market, Contractor Sectors** (utilities, transport, education, etc).

Research techniques used on a regular basis:

- Desk research.
- Telephone interviews, Personal / in-depth interviews.
- Focus groups / group discussions. Hall tests, Consumer research.

Background

AMA Research offer a combination of market research and marketing consultancy experience. This enables us to consider the client needs in the light of external market information. Our objective is to provide relevant recommendation or input, which can be practically implemented.

We like to spend some time at the beginning of a project understanding the company product range, the marketing approach taken and relevant business development issues. This enables us to be client focused in our approach and relate the interpretation of results directly to the client's issues.

Every project is managed by a director, who will be involved in all stages of the process including planning, interviewing, analysis, report presentation and client liaison. This ensures continuity of approach and facilitates a detailed understanding of the issues in addition to a more strategic overview.

AMA Research is now owned by Barbour ABI. **Barbour ABI** is a leading provider of construction intelligence services. With a team of in-house research specialists and a dedicated economics team, it provides commercially relevant insight and unique analysis of trends and developments within the building and construction industry.

Barbour ABI is the chosen provider of Construction New Orders estimates data to the Office for National Statistics, provider of the Government's National Infrastructure and Construction Pipeline and provides the planning application and development data to the Department for Communities and Local Government. Barbour ABI also provides data for independent organisations, such as the Construction Products Association.

Primary Research Methodologies Used

Desk Research – Research, analyse and collate data from all available sources, Government, private sector, AMA Research's existing library of data, plus our background knowledge, understanding and experience of the industry. Interrogate ABI Barbour data on any major projects underway and planning applications to support analysis and identify targets for interview.

Telephone Research - investigative telephone interviews can explore either or both qualitative and quantitative aspects and allow the interviewer to probe and develop issues as required to enhance the quality of the findings and ensure a good understanding of the processes and issues.

Face-to-face or Personal Interviews - in-depth interviews are used to draw out issues and highlight key aspects, often ahead of more structured telephone interviews, we target key people who are knowledgeable and influential in the supply chain.

Focus Groups – We use focus groups where the objectives are to obtain detailed perceptions and opinions on products / new products and new concepts, as they facilitate in-depth discussion and prompting of different viewpoints across knowledgeable participants.

Other methodologies are also used, as the research objectives dictate.

Clients

Below are some previous clients of AMA Research:

Some of Our Clients in the Bathroom and Kitchen Sector		
AKW	Danfoss	Franke
Kohler Mira	Bristan	Travis Perkins
Polypipe	RWC	Grafton Group
Polyrey	Grundfos	WRAP / ZWS
Bosch	Ideal Standard	Caesarstone

Many of our clients have commissioned us for repeat business, which we consider to be a positive statement of our quality of service. Due to the nature of our services in the business to business and trade sectors our client mix includes both larger, well-known companies and more specialised trade oriented companies.

AMA Capabilities / Projects Undertaken – Bathrooms and Kitchens

Mini Case Studies – AMA Research

Objectives – Review the market for non-residential shower control products and **residential and non-residential thermostatic mixing valves**.

Methodology – Using desk research initially, gather data from all the suppliers of relevant products, their product ranges, scale of activity where possible, company turnover, range of relevant products, distribution channels, also interview manufacturers, distributors and other trade commentators on their use of these products to determine overall market scale and activity.

Outcome – The research identified the scale of activity across the different products, where the growth opportunities were, which end use sectors would be likely to show growth in the future and enabled the supplier to structure their marketing spend accordingly.

Objectives – Review of new product developments in **waste traps, waste pipe** and fittings sectors.

Methodology – We ran a series of focus groups, which involved recruiting installers, booking rooms, preparing a discussion schedule, agreeing the content with the client, presenting existing and prototype products, assessing the current buying processes, moderating the groups, writing up reports on the findings.

Outcome – The groups identified design options which were preferred and those which were definitely not preferred and why, it also identified different regional preferences and enabled the client to focus on the preferred designs for further development.

Objectives - develop a detailed Excel spreadsheet model of the **usage levels for water-using appliances** across the UK.

Methodology – Gather all data on penetration and usage of water using appliances, such as baths, showers, taps, washing machines etc, across domestic and non-domestic environments and undertake consumer research to develop usage patterns and trends, then input the data on to a spreadsheet. Build a forecast model to take into account changing usage patterns, socio-economic and population/demographic changes etc.

Outcome – The research was used to develop government policy on water usage in the UK through a programme called MTP – Market Transformation Programme, to motivate manufacturers to design low water use products and to motivate consumers to reduce usage.

Objectives – Provide a quantitative assessment market for the **European market for bathroom PODs**.

Methodology – Combined desk research and interviews with a range of respondents within the bathroom POD manufacturing supply chain to establish the scale of the bathroom POD market by material type in each major European country. Interviews were conducted with manufacturers, contractors, component suppliers etc to establish estimates of the scale of product provision and to understand the key end use sectors in each country.

Outcome – The research identified the significance of the different European markets, growth trends, the key opportunities for change over the next few years and the major end use applications where opportunities were likely to arise.

Other Projects Undertaken – Bathrooms and Kitchens:

- **Objectives** – Provide a review of the **non-domestic showering market** in the UK on behalf of a major manufacturer.
Methodology – Combined desk research and mini-depth telephone interviews with a range of respondents within the non-domestic shower industry to establish the scale of the market, the key products used in the sector, the trends within each product area and the key suppliers with shares where feasible. Interviews were conducted with manufacturers, wholesalers, merchants, component suppliers etc. to establish estimates of the market size, by product, key trends, key influences and key end use applications.
Outcome – The research identified the key product sectors in the UK, with indications of the key end use areas likely to stimulate growth in the market over the next few years, also assessment of forthcoming legislative changes were also provided, particularly where these were likely to stimulate significant change.
- **Objectives** – survey of **plumbers’ attitudes towards a range of plumbing products**, assessing key advantages and disadvantages, and potential areas of application.
Methodology – we undertook a number of focus groups with plumbing contractors to determine their views on a range of plumbing fittings, the products were presented alongside competitor products, the feedback and discussion was structured to discuss the major disadvantages of current products, then prototype new products were introduced to establish feedback and understand whether the new products would address some of the disadvantages of the older products, in the eyes of the plumbers.
Outcome – the feedback was used to review the prototype designs and make amendments to them, or scrap the designs as appropriate.
- **Objectives** – a review of the **upmarket bathroom installation** sub-sector of the bathroom market with a view to identifying the size and scale of the market, key routes to market, whether the current socio economic trends are favouring up-market installations and market prospects.
Methodology – we undertook a mix of desk research and in depth telephone interviews to establish the scale of the up-market bathroom market and understand why the sector is different in many ways to the remainder of the market. Interviews were conducted with bathroom retailers, installers and up-market direct bathroom sellers.
Outcome – the feedback was used to better target the relevant distributors and retailers in the market place and to grow the business.
- **Objectives** - develop a detailed **profile of waste materials** generated in the plastic pipe industry, at the manufacturer level, distributor and contractor levels.
Methodology – Combined desk research and interviews with manufacturers, distributors, merchants and contractors to establish where the waste is being generated, how much waste is being generated, what is happening to the waste and what sorts of procedures are in place to monitor and improve the levels of waste being generated. Data was gathered through in depth face-to-face interviews with a number of contractors, as well as any other sources such as site waste plans, 'smartwaste', etc.
Outcome – The research enabled the industry to arrive at guidelines and significant quick win guidelines which meant that there was no Government intervention at that time, or since.



- **Objectives** – review the market for **compact laminate market** in the UK, on behalf of a major international provider of laminate products.
Methodology – undertake desk research and interviews throughout the industry to determine the usage of compact and exterior grade laminate products, assess the end use applications, the reasons the product is preferred and whether the market is perceived to be growing, what the barriers to further growth are and whether there is scope for significant change in the market. Also the size and scale of the market are to be assessed and the key players identified with their routes to market profiled.
Outcome – The research was used as the basis for the client to decide how to further develop their position in the UK market and to decide how much investment to make and how to plan their marketing and sales effort to maximum effect.
- **Objectives** - A review of the market **potential for inclusive bathroom products** across the UK, potential for growth, prospects for market entry, barriers to entry, supply chain etc.
Methodology – Desk research and telephone interviews to establish the scale and size of the relevant markets, understand the present trends and the socio economic and market factors influencing change in this market, and influencing whether the trends are likely to continue.
Outcome – The research was used to decide whether to introduce a new range of products targeted at the inclusive bathrooms sector.
- **Objectives** – review the market for **single utility and multi-utility** providers across England and Scotland, assessing contractor attitudes and barriers to resistance to change.
Methodology – undertake desk research to assess the scale of the market and follow this up with interviews with key suppliers to develop a more accurate view of the industry size, structure and trends. Undertake interviews with connections contractors to assess their views and opinions on multi-utility provision, also their views on their current supplier, strengths, weaknesses, opportunities, threats and determine how the client might develop a stronger strategic position.
Outcome – The research was used as the basis for developing a marketing and communications programme to establish a much stronger position in the market and eliminate some of the negatives associated with the client’s service and support.

