

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 process of information gathering and 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.

Clients

Below are some previous clients of AMA Research:

<u>Some of AMA's clients in the building products, materials and hire sector</u>		
British Gypsum	Tarmac	Speedy Hire
Alumasc	Velux	Travis Perkins
Polypipe	Isover	Grafton Group
A-Plant	RWC	Encon
Rifeng Pipes	Kier	Superglass

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 – Building Products, Distribution, Hire

Mini Case Studies – AMA Research

Objectives – Review the market for **shading control systems used in commercial buildings**.

Methodology – Using desk research initially, gather data from leading suppliers in terms of product ranges, scale of activity where possible, company turnover, project values, estimated market shares, products, distribution channels, also interview manufacturers, contractors and installers distributors and other trade commentators on their use of shading systems to determine overall market scale and activity, with forecasts of market developments over the next 5 years.

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.

Objectives – Review of **the specialist boards market** to assess volume usage, key features, reasons for usage, key application areas, buying criteria etc.,

Methodology – We ran a series of focus groups, which involved recruiting contractors, organising venues, developing a discussion schedule, agreeing the content with the client, assessing current buying processes, moderating the groups, submitting reports on the findings.

Outcome – The groups identified key issues relating to product/brand awareness, areas of use for different types of boards, barriers to use (cost, applications etc). choice of suppliers, product information sources etc as a basis for developing marketing plans.

Objectives - Review of the **generator hire market** to assess overall market size, recent trends, product segmentation, key players and success factors, with forecasts of market development over the next 5 years as a basis for a potential acquisition in this growing sector.

Methodology – Gather all data on the generator hire market in terms of market size (value/volume), trends / forecasts, product segmentation, key application areas, supply structure/major players, key success factors/market opportunities etc. The methodology involved a combination of desk and primary research with a mix of companies throughout the supply chain.

Outcome – The research was used to provide a detailed market assessment to support a major potential acquisition review

Objectives – Provide a detailed quantitative assessment of the **structure of the building and home improvement products market** in the UK.

Methodology – Involved developing a detailed spreadsheet breaking down the market into over 100 product categories and assessing each category in terms of market size, recent trends, split between new build and refurbishment work, splits by residential and non-residential applications.

Data was based on a combination of AMA reports supported by primary research into product sectors where existing knowledge was limited or required updating. Interviews were conducted with manufacturers, contractors, material/component suppliers.

Outcome – A comprehensive spreadsheet outlining sector sizes, application mix and distribution channels and market forecasts by each product category.

Other Projects Undertaken – Building Products, Distribution, Hire:

- **Objectives** – Analyse the market for glass balustrading and balcony systems, to include size, trends, residential versus non-residential mix, market drivers, review of key players, assessment of routes to market etc.
Methodology – Combined desk research and interviews with a range of respondents within the industry, to establish the range of applications, the limitations, the opportunities, the key players, the routes to market etc. Establish where the opportunities lie for the products, given the current housing and non-residential building prospects. Identify any regional opportunities.
Outcome – The research identified the size and structure of the market sector, the key routes to market, the key application areas, the opportunities over the forthcoming 3-5 years and the barriers to further growth.
- **Objectives** - Provide detailed listings of **ALMOs and housing associations** in the south east of England.
Methodology – Combined desk research and interviews to establish address and contact details per organisation, area of operation, housing stock, key market sectors, development and new build activity, refurbishment programmes, relating to Decent homes, procurement methods, any particular projects in the pipeline, and links with other organisations, such as local authorities.
Outcome – The research enabled the construction contractor to better organise and focus resources towards the social housing sector.
- **Objectives** - develop a better understanding of the **'Infrastructure' sector** in terms of demand for 'construction' equipment hire, including transport, power, utilities etc.
Methodology – Combined desk research and interviews to establish scale and structure for the equipment hire markets in this sector, key market trends, contractor viewpoints, key products hired, opportunities and threats in the sector, future prospects for the infrastructure sector, challenges facing further development in the sector etc.
Outcome – The research enabled the supplier to better target their marketing and sales resource to those sectors and those companies best positioned to take advantage of the opportunities in the infrastructure sector.
- **Objectives** – Review the total UK **supply chain for construction products and materials**, to profile the total supply chain for UK building products and materials.
Methodology – undertake desk and telephone research to assess imports, exports, industry sector concentrations, waste levels per industry sector, resource efficiency factors (embodied water/energy, waste levels, recycled content etc) and levels per sector; create an overall analysis of UK supply chain movements through to distribution and end use applications.
Outcome – The research was used as the basis for developing a set of industry targets identifying where high levels of waste were being generated, or where high levels of embodied water or embodied carbon were being used, such that the client could target future marketing and communication resource usage most effectively.
- **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 **flat roofing membranes/felts materials market** and the insulation requirements for flat roofing, draw together market sizes, trends developments, supply chain analysis etc.
Methodology – Gather information and undertake desk research into the insulation and flat roofing materials market, assess the key UK manufacturers and the importers and set up interviews with key respondents in each of the product sectors etc. Draw together a profile of the market sizes in each sector by volume and value, key materials used in each product sector and the level of imports in each of the sectors, also trends, changes, legislative influences, environmental factors and so on.
Outcome – Prepare a detailed report on the flat roofing market, the membranes and felts sector was analysed in particular detail, but also the insulation required for the sector, such that the importing client could develop their position in the UK.
- **Objectives** – Compile a report on the **plasterboard market in the UK**, where it is used, key end use applications areas in residential and non-residential applications, levels of use of multiple boarding etc.
Methodology – Gather information and data across the plasterboard market and from plastering contractors and dry-walling contractors to establish mixes and areas of use and multiple boarding frequency. Analyse new build data and wall surface areas, also ceiling surface areas and establish a profile of plasterboard usage across all areas of new build and estimated for refurbishment in residential and non-residential applications.
Outcome – Draw together a report and Excel spreadsheet profiling the usage of plasterboard right across the UK new build and RMI industry, and identifying where the client could expand their share and where they were already strong.



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. Our telephone contacts and interviews are undertaken by experienced and qualified research executives.

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. Our personal interviews are undertaken by experienced and qualified in-house research executives.

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, with these participants provoking each other into different viewpoints. They can save time compared to individual interviews, as all of the participants are effectively interviewed together and they offer the opportunity to seek deeper clarification on any issues where there is doubt or uncertainty.

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