

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**

### AMA Research

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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, enabling 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.

## 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.

## Clients

### Some of AMA Research’s clients in the Heating and Electrical Sector:

<b>Rexel / Newey &amp; Eyre</b>	<b>Bosch</b>	<b>Edmundson</b>
<b>Hager</b>	<b>Grundfos</b>	<b>GE Lighting</b>
<b>3M</b>	<b>ITW</b>	<b>ECA</b>
<b>Philips Lighting</b>	<b>Luceco</b>	<b>RS Components</b>
<b>Kidde</b>	<b>Danfoss</b>	<b>RWC</b>

Many of our clients commission us for repeat business, which we consider to be a positive statement of our quality of service.

## AMA Capabilities / Projects Undertaken – Heating & Electrical

### Mini Case Studies – AMA Research

**Objectives** - Provide benchmarking data in the electrical contractors sector, on behalf of a major wholesaler, assessing anticipated sales over the next 2 quarters and year and comparing with achieved sales changes over the most recent quarter.

**Methodology** – Primarily telephone research to establish direct quantitative responses to issues such as how have sales changed, what changes are expected over the next 12 months, but also to raise and discuss more qualitative issues, such as why are these changes occurring and what key influences are apparent.

**Outcome** – The research enabled the organisation concerned to target their sales forecasting more effectively and by region.

**Objectives** - Develop a detailed understanding of the security and fire industry in the public sector, profile key suppliers, key issues, changing market factors etc.

**Methodology** - The project involved comprehensive initial desk research of the public sector agencies using security services and facilities. The second stage involved more detailed **telephone and personal interviews** within the target sectors to understand the opportunities within those sectors and to establish views on the buying and specification processes.

**Outcome** - The output of the research was used as part of a review of the future market strategy of the company concerned.

**Objectives** – Profile the market for **pressure and temperature valve usage and replacement** across the unvented water cylinder sector.

**Methodology** – undertook desk and telephone research with key suppliers across the industry, analyse the changes in the unvented cylinder sector, the growth of combi boilers, the displacement of cylinder use in households, the changing safety requirements and legislation for unvented cylinders in the UK. Profile the establishment of unvented cylinders, the scale of the P&T valve replacement market, the scale of the new installations sector.

**Outcome** – The research identified some substantial threats to the growth of the P&T valve market as the underlying cylinder market is under significant threat from the growth of combi boilers and other heating solutions.

**Objectives** - develop a detailed understanding of the UK hotel RMI market, including M&E, lighting and other electrical product sectors. Identify the scale of the market size, trends, key companies and basic structures. Also identify the suppliers of RMI products and services to hotels, in terms of overall market sizes in the hotel sector and key suppliers into hotels.

**Methodology** - Desk research to gather hotel market structural and market size and trend information, interviews with hotel facilities managers to establish type and scale of different types of RMI expenditure. Also desk research to establish market sizes in the supply chain, also identification of key suppliers in each of the different product and service sectors. Balance this with interviews to establish any missing details or facilitate market size assessment.

**Outcome** - The output of the research to be used as the basis of a market development strategy into the hotel sector.

## Other Projects Undertaken

- **Objectives** - Provide qualitative and quantitative assessment of the **market for lighting products in the operating theatre sector**.  
**Methodology** – Combined desk research and interviews with a range of respondents within the healthcare and the lighting supply chain to establish the scale of the lighting market for major and minor surgical lighting products. Interviews were conducted with NHS trust representatives, suppliers, clinicians, private sector health theatre directors and other influencers to establish estimates of the scale of product and service provision.  
**Outcome** – The research identified the scale and significance of the sector, the growth trends, the key opportunities for change over the next few years and the requirements for the NHS in particular from any lighting supplier into the sector.
- **Objectives** – survey of **installers’ attitudes towards a range of selected heating products**, assessing key advantages and disadvantages, and potential areas of application.  
**Methodology** – we undertook a number of focus groups with contractors to determine their views on a range of heating valve 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 installers.  
**Outcome** – the feedback was used to review the prototype designs and make amendments to them, or scrap the designs as appropriate.
- **Objectives** - Develop a **detailed understanding of the security and fire industry in the public sector**, profile key suppliers, key issues, changing market factors etc.  
**Methodology** - The project involved comprehensive initial desk research of the public sector agencies using security services and facilities. The second stage involved more detailed telephone and personal interviews within the target sectors to understand the opportunities within those sectors and to establish views on the buying and specification processes.  
**Outcome** - The output of the research was used as part of a review of the future market strategy of the company concerned.
- **Objectives** – Profile the **electrical product distribution supply chain** and assess the significant opportunities in the different channels.  
**Methodology** – develop an understanding of electrical products distribution in each of the key supply chain elements such as wholesalers, electronic component distributors, specialist contractors, Screwfix etc. Understand the buying process per sector and the market trends, identifying opportunities for change and for market penetration.  
**Outcome** – The research identified the scale of activity in each of the channels and at each point in the supply chain. In addition, the research identified key changes in construction activities and socio economic and demographic changes and how these changes might create opportunities for the electrical product suppliers.



- **Objectives** – review of the market for unvented heating cylinders in the UK market.  
**Methodology** – undertake desk research and interviews throughout the industry to determine the size and scale of the market and the key players identified with their routes to market profiled. The research also addressed the shift away from cylinders generally and the shift away from open-vented cylinders with a view to forecasting the market size for unvented cylinders going forward over the next 5 years.  
**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 for **electrical tapes and similar accessories** amongst the electrical contractors.  
**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. Interviews to assess the specification process, why particular tapes were chosen and why other brands were not and to understand whether there was scope for a new product in this sector.  
**Outcome** – The research was used to decide whether to introduce a new range of products targeted at the electricians.



- **Objectives** – Provision of detailed overview and understanding of the current UK market for **home automation systems**, with particular reference to curtains and blinds.  
**Methodology** – Comprehensive initial desk research into the home automation market including identification of key suppliers, technologies and systems currently being used and size of market. Subsequent detailed telephone and personal interviews were used to clarify the current state of the market, opportunities for future growth and identification of potential barriers for future market development.  
**Outcome** – The output of the research was incorporated into a review of the potential growth sectors for the company.