

Background Information and Table of Contents

**Research on the Commercial Vinyl
Flooring Manufacturers in the UK Market**

April 2016

leadingedge

Introduction to report.

Report scope

- This market research study covers the commercial vinyl flooring market in the UK and focusses on the following manufacturers: Altro, Forbo, Gerflor, ITEC, Polyflor and Tarkett.
- The product scope is contractor installed vinyl flooring in non-residential (commercial) buildings such as schools, hospitals, retail outlets and offices. The report includes both vinyl sheet and tiles but excludes Luxury Vinyl Tiles (LVT) and semi flexible tiles.

Research method

- The findings in the report are based on the following:
 - detailed telephone interviews with **100 flooring contractors** involved in the commercial vinyl market.
 - desk research using government statistics, and Leading Edge's construction forecast model.

Key benefits of report

- The report assesses a number of key criteria crucial for a manufacturer's success in this market, based on feedback from 100 flooring contractors. The findings will help readers understand the market positioning of each manufacturer, how they are rated by their customers, key routes to market and the brand strengths and weaknesses.
- It includes information on:
 - the market size and forecast growth
 - market share by manufacturer for the total market and specific segments
 - market and customer service performance of individual manufacturers.
- A full list of the sections in the report is provided overleaf.

The report has the following table of contents. Each section within the key findings typically contains the main conclusions plus a number of graphs, tables and contractor comments.

1. Introduction
2. Executive summary
3. Key findings from research
 - a) Size and forecast growth of the vinyl flooring market
 - b) The growth of safety flooring
 - % of installations that are safety flooring
 - reasons for growth in safety flooring
 - c) Manufacturer market share - safety and smooth flooring
 - d) Manufacturer market share - by region and size of contractor
 - e) Use of each manufacturer
 - % using each manufacturer
 - average number of manufacturers used
 - f) Reasons for buying from each manufacturer
 - reasons for selecting – overall market
 - reasons for individual manufacturers
 - g) Best manufacturers for price, quality and design
 - % selecting each manufacturer for each attribute

The report contains:

- 142 quotes from flooring contractors
- 85 slides
- 31 tables, graphs and charts

Manufacturers covered:

- Altro
- Forbo
- Gerflor
- ITEC
- Polyflor
- Tarkett

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- h) Changes flooring contractors would like to see from manufacturers
 - including changes on deliveries, stocking, availability, pricing, sales representation and products
 - i) Market share and growth by design of vinyl flooring
 - including reasons for growth of designs
 - j) Importance of specification and frequency of specification breaking
 - proportion of vinyl specified
 - most likely manufacturers to be specified
 - likelihood of switching specifications
 - k) Route to market by manufacturer and for total market– direct and distribution
 - % share of direct and distribution
 - reasons for purchasing direct or from a distributor
 - % of sales via direct and distributors by manufacturer
 - how orders are placed – email, phone, online, fax
 - l) Promotional schemes – frequency of use and areas for improvement
 - m) Vinyl recycling schemes – frequency of use and areas for improvement
4. Profile of respondents

The regional spread of the sample of 100 flooring contractors broadly reflects the UK population although 16% of contractors covered all of the UK. The majority of flooring contractors interviewed had an annual turnover of £0.2m - £5m.

Main region worked in	Sample %	Total popn. %
All over the UK	16%	
South East inc London	27%	27%
North England	16%	24%
Midlands / Central	15%	16%
South West	10%	8%
Scotland	8%	8%
East Anglia	4%	9%
Wales	3%	5%
N Ireland	2%	3%
TOTAL	100%	100%

Annual Turnover Band	% of Respondents
Under £200k	1%
£0.2m - £0.9m	36%
£1m - £4.9m	53%
£5m - £9.9m	9%
Over £10m	1%

Square metres installed	% of Respondents
< 1,000	1%
1,000 - 10,000	59%
10,000 - 20,000	23%
> 20,000	17%

We have produced many research reports in the flooring sector. Here are a few testimonials from flooring clients.

- “We found the Luxury Vinyl Tile market report very useful and it will help in developing our sales and marketing plans for the UK. The quotes from the flooring contractors were particularly helpful in understanding their purchasing behaviour.” **Marketing Manager, Tarkett**
- “Leading Edge helped us to identify the market opportunity and assess the rewards and risks of setting up online. We were very happy with their research and it contributed towards our decision to launch the online flooring offer. We are now successfully trading products for the residential market from our company website”. **Commercial Manager, Gerflor**
- “Leading Edge carried out a customer survey on our behalf. This was across a number of product and customer groups which added to the complexity of the process. The team at Leading Edge were supportive and helpful throughout the process and the final report has contributed to our business planning.” **Sales and Marketing Director, Gradus**
- “We asked Leading Edge to help us to develop our company strategy. The work was excellent and we acted upon most of the recommendations”. **Director, Ardex**
- “We worked with Leading Edge to help us find a new sales partner in the UK. Throughout the project they took a very professional approach and the reports providing information on potential partners were first class. I would certainly be happy to use them again.” **Export Sales Manager, Upofloor**
- “The experience of the flooring industry at Leading Edge makes them an obvious choice for your research needs in this sector. We were very happy with the level of co-operation and input from LE especially because the project we set them was very demanding in timescale”. **Phil Pond, Scarlet Opus**

Leading Edge is a long established market research consultancy with specific expertise in the flooring and construction industries.

- Established in 1988 with an excellent track record and a repeat business of 66% plus.
- Specialists in the flooring, construction and building products sectors.
- Previously published eight multi-client reports on the flooring market and carried out bespoke research for 12 flooring industry clients including manufacturers, distributors and importers.
- Key services include
 - market research
 - market analysis
 - customer benchmarking
 - forecasting
 - strategic planning.
- The Director of Leading Edge, Mel Budd, was Sales and Marketing Director at a leading vinyl manufacturer and so has experience in the industry both in an operational and consultancy capacity.
- Over 250 projects and 100 clients in the last 10 years in the construction sector.
- Market research is carried out in compliance with the Market Research Society's (MRS) code of conduct.

Buying the report

The report costs £1,750 plus VAT.

To order a copy please call us on 01252 279990 or
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