

**A SYNOPSIS OF THE COMPANY
AND THE EXPERIENCE
OF IBR CONSULTANTS**

- CONSTRUCTION INDUSTRIES -

ABOUT IBR

IBR was established in 1993 to provide customers with top quality, international business-to-business and industrial market and marketing research services.

We comprise a team of senior consultants and fully experienced research interviewers. Our aim is to provide clients with a very high standard of research and consultancy services. The members of our team have all been involved in the market research industry for some time and have built up considerable experience of working in a variety of market sectors.

We have very wide experience of undertaking research, both geographically and by business and industry sector. Where we recognise that a client requires specific expertise in his industry, we can call on this expertise through our team of consultants.

WHAT IBR DOES

IBR undertake a wide range of market and marketing research assignments, both in the United Kingdom and internationally. Our clients are mainly large international companies in a wide variety of business and industry sectors.

Assignments for clients can involve research to help them with new product or service development, or assess potential new markets they are keen to exploit. Where the business is more developed, we can conduct research to measure levels of satisfaction among clients' customers, or to benchmark their customers' attitudes and expectations. Our work can also involve investigating the effectiveness of clients' marketing communications, whether for example, through their sales literature, or through advertising in the trade press.

In view of our experience, we are happy to undertake research assignments where perhaps others may hesitate. We know of, and appreciate the problems of, undertaking research in business and industry, but embrace it with open arms, because this is the core focus of our business. Tell us what the issues are and we will research them!

SECTORS

IBR have built up an enviable track record of undertaking research in a wide range of business and industry sectors. The sectors in which we work most regularly include:

- Building and construction
- Chemicals and plastics
- Electrical and electronic
- Energy, environment and utilities
- Engineering products and services
- Ferrous and non-ferrous metals
- Food and drink
- Paper, print and packaging

We have also undertaken projects in many other industries, as the techniques we use can be applied across most markets and industrial sectors.

RESEARCH ISSUES

IBR carry out a wide variety of research assignments for clients. The main issues we research are detailed below with links to examples of the work we have undertaken.

- Customer attitudes and needs
- Customer satisfaction
- Distribution channels
- Market opportunities
- Marketing communications
- New product or service development

WHY YOU SHOULD USE IBR

The main reasons why our clients use us to provide their research needs are:

1. We have extensive experience of undertaking research across a wide range of products, services and countries.
2. Senior management is deeply involved in all aspects of the research. We add value not cost.
3. All our consultants working on projects have a wealth of experience in business and industrial market research.
4. Interviews are undertaken by experienced business and industrial market research interviewers.
5. Our approach to undertaking research is thorough throughout all stages of the research project.
6. We maintain regular contact with our clients and provide them with updates on the progress of their projects. No hidden surprises!

Above all, we are committed to providing excellent value for money and will go the extra mile to ensure our clients are highly satisfied with the quality of work we undertake.

SELECTED CLIENTS

A wide variety of companies and organisations have used the services of IBR either direct or through other consultancy companies. Examples of these include:

- A leading UK supplier of construction equipment
- A global leader in the supply of construction chemicals
- A world leader in glass manufacture
- A leading UK supplier of contract floor-coverings
- One of the largest suppliers of fitted furniture to private developers in the UK
- One of Europe's largest chemicals companies
- A major US supplier of wood finishing equipment
- A major supplier of industrial gases
- A world leader in speciality paint markets
- A leading European electrical components manufacturer
- A leading building research organisation
- One of the world's largest manufacturers of speciality steels
- Two leading food & drink trade associations
- A leading European supplier of business and speciality papers
- A major Scandinavian supplier of paperboard

EXPERIENCE OF IBR CONSULTANTS IN THE CONSTRUCTION INDUSTRY

Examples of where our consultants have undertaken investigations in the construction industry, include the following:

- **Opportunities for a global supplier of building chemicals in the UK:** A two-stage research programme was undertaken to investigate ways in which our client could develop opportunities in the building chemicals market in the UK. Research was undertaken among over 200 architects, construction companies, house-builders, specialist sub-contractors and distributors to determine how they make decisions about what they specify, buy or stock; their awareness of the leading suppliers of building chemicals; the factors that determine how suppliers are selected and the sources of information used by these key decision makers to learn about products and suppliers. The advice given from the outcome of the research has greatly aided our client in developing the most appropriate strategies to win profitable business.
- **The market for energy efficient glass in the EU:** a comprehensive investigation into the market for a special type of architectural glass was undertaken in France, Germany, Italy and the UK. The main aim of the product was to provide the industry with a glass that offered the benefits of solar protection and thermal efficiency, but with excellent light transmission and low reflectivity properties. A major programme of research was undertaken in all countries among decision-makers at all stages in the purchasing chain. The outcome of the research helped the client to decide on the best new product options to follow.
- **Distributor research in the building access security market:** Research was undertaken in France and Germany to help identify potential distributors of a safety device used in buildings. The research comprised a programme of desk research to identify potential distributors followed by a series of telephone contacts to determine the level of interest these companies might have in acting for our client.
- **The image and satisfaction with a supplier of fitted furniture:** The client is a leading supplier of fitted furniture to private developers in the house building industry. A programme of 150 in-depth interviews was conducted largely over the telephone with individuals responsible for specifying and buying fitted furniture for their sites around the country. The research investigated the image of the company and the levels of satisfaction that these key decision-makers had with our client. This was compared with their main competitors. In addition a survey was undertaken among the clients' staff to determine how closely their internal perceptions match those of their customers. The research helped to identify areas where management was able to make changes to improve the company's competitiveness in the market.

- **Building and construction companies' attitudes to the level of service provided by a major hire and sale company:** The study was conducted on behalf of the client's seven individual business groups, all of whom are involved in hiring and/or selling products to the building industry. In total, 630 interviews were conducted with key decision-makers. The final analysis pinpointed a number of areas where management was able to initiate changes to improve the business units' performance
- **Construction markets in Greece, Poland and Turkey:** Research was undertaken to provide our client with an overview of the road construction markets in Greece, Poland and Turkey. The purpose of the research was to help prepare the local sales offices with a better understanding of the short and longer term opportunities in their local markets prior to the Olympic Games (Greece) and accession to the EU (Poland and possibly Turkey).
- **Attitudes to the level of service provided by a supplier of above and below-ground drainage systems:** An investigation was undertaken on behalf of a leading supplier of above and below-ground drainage systems among its major builders merchant customers. The standing of the company was assessed and measures of the level of service which the company provided to these customers, was investigated. The study was repeated to assess the impact of changes that were introduced in the company's services offering.
- **Access tower platform systems:** An investigation was undertaken among companies hiring and buying access tower platform systems, in order to find out what customers best and least liked about the features and benefits of the new system which the company had recently launched. The research findings were used to tailor the advertising and sales promotion programme to match customers' expectations more closely.

EXAMPLES OF OTHER RESEARCH PROJECTS UNDERTAKEN BY IBR CONSULTANTS

<p>Customer attitudes and needs</p>	<p>Project aim: To explore business opportunities in the electronic PCB industry in the UK and Ireland.</p> <p>Methodology: An investigation was undertaken to establish the potential opportunities for a major supplier of industrial gases in the provision of products aimed to improve the productivity and quality of the PCBs being manufactured. Research was undertaken among a sample of key decision-makers to evaluate their opinions of the services being offered by our client.</p> <p>Results: The research findings enabled the client to target customers with a more carefully refined offer, which resulted in a greater uptake of business.</p>
<p>Customer attitudes and needs</p>	<p>Project aim: To explore attitudes to quality management systems in the bacon processing industry.</p> <p>Methodology: The investigation covered the quality control systems that are in operation in the bacon and ham industry in the United Kingdom. We interviewed a number of leading meat processors and retail outlets to investigate decision-makers' awareness of and satisfaction with the systems, which the bacon industry had in place.</p> <p>Results: The outcome of the research helped our client to understand what initiatives they had to take to promote its quality management system.</p>
<p>Customer attitudes and needs</p>	<p>Project aim: To investigate opportunities for rationalising energy service contracts.</p> <p>Methodology: Research was undertaken among energy management companies and customers to investigate the extent to which energy management contracts could be standardised. The aim was to devise a more standardised approach to drawing up such contracts so as to reduce the amount of time and effort devoted to drafting them, as many are extremely complicated and involved.</p> <p>Results: The client is continuing with the process of producing a simplified structure for energy service contracts, using the results of the research we conducted for them.</p>

<p>Customer satisfaction</p>	<p>Project aim: To investigate the quality of service provided by a leading supplier of cable saturants and fillers.</p> <p>Methodology: A research programme was undertaken by IBR consultants interviewing around 30 key technical and purchasing decision-makers among leading cable manufacturing companies. The research was carried out in Europe, the USA, Australasia and South East Asia.</p> <p>Results: The client undertook a detailed appraisal of the quality of services offered by the company and implemented a number of changes to improve the company's competitiveness.</p>
<p>Distribution channels</p>	<p>Project aim: To investigate the performance of distributors of wide belt wood sanders in matching customers' expectations.</p> <p>Methodology: This study was conducted among companies in Germany, following our client taking over one of Europe's leading producers of wood sanding machines. The investigation covered distributors and their customers. We interviewed distributors in person and customers over the telephone.</p> <p>Results: The research findings provided our client with a number of action points to help return the newly acquired company to a more profitable position.</p>
<p>Distribution channels</p>	<p>Project aim: To explore the service requirements of electrical component wholesalers.</p> <p>Methodology: A programme of face-to-face interviews was undertaken among electrical wholesalers and contractors to determine the service levels they need from their suppliers. The aim of the research was to identify new service opportunities for the components manufacturer.</p> <p>Results: The outcome of the research provided the client with a valuable insight into the service requirements of both types of companies. This information has helped them to re-align their service offering to wholesalers.</p>

<p>Market opportunities</p>	<p>Project aim: To research the size and structure of the UK popcorn industry.</p> <p>Methodology: Our client commissioned IBR to undertake a detailed study of the UK popcorn industry with the aim of publishing the results, which would be circulated around the trade. The research results provided the trade with a thorough understanding of the ways in which the popcorn market operated in the UK. Profiles of the main end-use market outlets, such as the cinema industry, were given.</p> <p>Results: The report was distributed to all key players in the UK with plans to publish a series of reports on an occasional basis, to keep the industry informed of key issues.</p>
<p>Market opportunities</p>	<p>Project aim: To explore opportunities in the food and drink market for water treatment systems.</p> <p>Methodology: We undertook an investigation among the larger food and drink producing establishments in the UK, to help our client gain a more comprehensive understanding of these companies' waste treatment practices. Interviews were conducted among 250 establishments and a detailed report of the key findings was prepared.</p> <p>Results: The outcome of the research enabled our client to refine their offering and to prepare a more thorough strategy to develop business among these establishments.</p>
<p>Market opportunities</p>	<p>Project aim: To investigate opportunities to develop the specialist coatings market in the UK.</p> <p>Methodology: We conducted research among specialist painting contractors to identify ways of increasing their use of specialist paints and high-performance coatings. Information was collected by undertaking a programme of 140 telephone interviews. These were used to investigate the sectors in which these contractors work and their current and future potential use for specialist products. Using this information, we were then able to identify the most likely sector opportunities and devise suitable product-based approaches.</p> <p>Results: The client was able to determine which specific sectors to develop and how to refine its product range to meet customers' specific needs.</p>

<p>Marketing communications</p>	<p>Project aim: To assess the suitability of advertising in the business press to alter key decision-makers' perceptions.</p> <p>Methodology: Our client planned to undertake a major campaign to raise awareness of their products and to improve target customers' perceptions of the value of their products. Research was undertaken by holding a number of focus groups in which key decision-makers participated.</p> <p>Results: The research findings enabled our client to make a number of important modifications to their communications strategy. They improved the effectiveness of the campaign, by introducing elements that the research highlighted as being critical to its success.</p>
<p>Marketing communications</p>	<p>Project aim: To determine customers' attitudes to a new series of product brochures.</p> <p>Methodology: We undertook a series of face-to-face interviews among architects and designers to ask their opinions about the design of the new range of brochures being proposed by a contract flooring company.</p> <p>Results: The outcome of the research enabled the client to take very clear decisions about the designs that should be used on its new brochures.</p>