

**A SYNOPSIS OF THE COMPANY  
AND THE EXPERIENCE  
OF IBR CONSULTANTS  
- ENERGY RELATED MARKETS -**

## **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 world leader in glass manufacture
- a leading UK supplier of contract floor-coverings
- one of Europe's largest chemicals companies
- a major supplier of industrial gases
- a world leader in speciality paint markets
- a leading European electrical components manufacturer
- a leading building research organisation
- a major US supplier of wood finishing equipment
- 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

## RELEVANT MARKET RESEARCH EXPERIENCE OF IBR CONSULTANTS IN ENERGY RELATED RESEARCH

Some of the sectors where our consultants have undertaken investigations relevant to energy, include the following:

- **Opportunities for rationalising energy service contracts:** Research was undertaken among energy management companies and customers in order to investigate the extent to which energy management contracts could be standardised. The aim of the work was to devise a more standardised approach to drawing up such contracts to reduce the amount of time and effort devoted to drafting them, as many are extremely complicated.
- **The impact of site specific advice in energy savings in the retail sector:** A series of face-to-face interviews were undertaken among those responsible for energy management in their company, to assess the effectiveness of site visits made by energy consultants. The results showed that the visits were considered to be of value and contributed to companies in the retail sector making energy savings.
- **Attitudes to energy management in the UK retail sector:** A programme of 100 personal interviews was undertaken among a selection of the top 300 retailers in the UK. This was in order to investigate senior managers' attitudes to energy management. The results showed a wide variation in the extent to which senior staff responsible for energy management made efforts to save on energy costs in their company. Recommendations were given to enable the client to embark on an effective educational programme directed at these energy managers.
- **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.

- **Analysis of the market for energy management services:** One of the major UK suppliers of energy management services required a detailed analysis of its business to be undertaken by exploring data the company held on its customers. One of our associate consultants experienced in the area of “data mining”, was able to set up the procedures for undertaking this analysis and to provide the client with a detailed summary of its customer data.
- **Opportunities in the European market for a passive solar heating device for domestic housing:** An investigation was undertaken to determine the market potential for a passive solar heating device which was to be used in homes located in particularly sunny areas, but where heating would be required in the evenings. Interviews were held with architects and building design consultancies in areas such as Northern Italy and Southern Germany to assess the likely interest in the product. The research showed that the market was unlikely to offer significant potential for the product.
- **Multi-utilities:** An analysis of European multi-utility companies giving a review of their core business and strategies for the future. Of particular importance was an analysis of ways in which companies are merging to achieve synergistic savings and a critical mass customer base for promoting electricity, gas, water and telecommunication services, often through Internet facilities. The report enabled the client to study diversification strategies.
- **Renewable energy sources:** Various studies on renewable energy sources and energy conservation devices including wave power and fuel cells. Also a novel semiconductor thermoelectric device designed to convert heat into low level electrical power in remote locations. Work on renewable also included energy from waste schemes.
- **UK Electricity Industry:** A review of the UK electricity industry including company analysis, technology trends (CHP, renewables etc) and environmental issues. Through this work the client was able to identify major trends within the industry.
- **Offshore Electricity and Gas:** An analysis of upstream activities in the UK Continental Shelf in terms of major oil/gas fields, technology and products. Company mergers and strategies were also discussed.

## EXAMPLES OF RESEARCH UNDERTAKEN BY IBR CONSULTANTS

<p><b>Customer attitudes and needs</b></p>	<p><b>Project aim:</b> To explore business opportunities in the electronic PCB industry in the UK and Ireland.</p> <p><b>Methodology:</b> 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><b>Results:</b> 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><b>Customer attitudes and needs</b></p>	<p><b>Project aim:</b> To explore attitudes to quality management systems in the bacon processing industry.</p> <p><b>Methodology:</b> 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><b>Results:</b> The outcome of the research helped our client to understand what initiatives they had to take to promote its quality management system.</p>
<p><b>Customer satisfaction</b></p>	<p><b>Project aim:</b> To investigate building and construction companies' attitudes to the level of service provided by a major hire and sale company.</p> <p><b>Methodology:</b> The study was conducted on behalf of the client's seven individual business groups, all of whom were involved in hiring and/or selling products to the building industry. We interviewed 630 key decision-makers among customer companies in person and over the telephone.</p> <p><b>Results:</b> The final analysis pinpointed a number of areas where management was able to initiate changes to improve each business unit's performance.</p>

<p><b>Customer satisfaction</b></p>	<p><b>Project aim:</b> To research the performance of a major supplier of thermal paper used to produce fax and recording chart products.</p> <p><b>Methodology:</b> This research project was carried out in more than twenty countries in Europe, Africa, South East Asia and Australasia. We prepared a self-completion questionnaire, which was sent to each customer. Once these were returned, we were able to identify the areas where customers had most problems. We then contacted key customers by telephone and held discussions in their own language to review in depth, the areas of product and service quality with which they were most dissatisfied.</p> <p><b>Results:</b> We produced a series of detailed recommendations, which enabled our client to take the most appropriate remedial action.</p>
<p><b>Customer satisfaction</b></p>	<p><b>Project aim:</b> To investigate the quality of service provided by a leading supplier of cable saturants and fillers.</p> <p><b>Methodology:</b> 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><b>Results:</b> 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><b>Customer satisfaction</b></p>	<p><b>Project aim:</b> To assess levels of satisfaction among customers following a client's customer services department being centralised.</p> <p><b>Methodology:</b> Following undertaking a number of initiatives to improve customer services, a leading manufacturer of paperboard then centralised its customer services department. Research was undertaken to examine the impact of this on levels of satisfaction among its customers. Interviews were undertaken among 75 customers in France, Germany and the UK.</p> <p><b>Results:</b> The outcome of the research confirmed that the switch had gone relatively smoothly, although there were a number of areas affected by the move to which the client had to attend.</p>

<p><b>Distribution channels</b></p>	<p><b>Project aim:</b> To investigate the performance of distributors of wide belt wood sanders in matching customers' expectations.</p> <p><b>Methodology:</b> 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><b>Results:</b> 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><b>Distribution channels</b></p>	<p><b>Project aim:</b> To explore the service requirements of electrical component wholesalers.</p> <p><b>Methodology:</b> 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><b>Results:</b> 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><b>Market opportunities</b></p>	<p><b>Project aim:</b> To research the size and structure of the UK popcorn industry.</p> <p><b>Methodology:</b> 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><b>Results:</b> 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><b>Market opportunities</b></p>	<p><b>Project aim:</b> To explore opportunities in the food and drink market for water treatment systems.</p> <p><b>Methodology:</b> 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><b>Results:</b> 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><b>Market opportunities</b></p>	<p><b>Project aim:</b> To investigate opportunities to develop the specialist coatings market in the UK.</p> <p><b>Methodology:</b> 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><b>Results:</b> 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><b>Marketing communications</b></p>	<p><b>Project aim:</b> To assess the suitability of advertising in the business press to alter key decision-makers' perceptions.</p> <p><b>Methodology:</b> 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><b>Results:</b> 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>