



**IC Customer Insight®**  
Floor Coverings in  
Germany 2022

# Methodical profile

## IC Customer-Insight® Floor Coverings in Germany 2022

- The IC Customer Insight Floor Coverings in Germany provides you with all the necessary information on current and future material preference, brand awareness, buyer behavior and customer segmentation based on price types.
- All questions are evaluated separately for the materials – laminate and LVT. This gives a clear picture per material group.
- We deliver objective results with specific strategic recommendations.
- As a basis for strategic decisions and improved positions in the competitive environment, a survey is conducted among existing and potential buyers.
- All questions are evaluated separately for the various customer segments (homeowners and apartment owners). Accordingly, the results can be viewed in a differentiated manner with regard to purchasing and usage behavior, brand awareness and price types.



### Population

Homeowners 18 years and older

### Sample size

Germany: N=1.000

### Survey method

Representative online survey  
Duration of the survey: approx. 10 min.

### Survey period

April 2022

# Study design of Customer-Insight® - Floor Covering

## IC Customer-Insight® - Floor Covering

Population: homeowners (house and apartment) in Germany, 18 years and older (N=1,000)



## Representative online survey - CAWI (Computer Assisted Web Interviews)

Anonymized survey with homeowners approx. 10 min (20 questions)



## Survey Topics

Buying and Usage Behavior			Brand Awareness	Customer Journey	Price Types
Textile	Ceramics	Laminate	TOP Brands	<ul style="list-style-type: none"> <li>✓ Purchase decision maker / Influencer</li> <li>✓ Sources of information</li> </ul>	<ul style="list-style-type: none"> <li>✓ Innovative customer segmentation by price types</li> </ul>
Parquet/ Solid Wood	Stone	LVT			
Elastic Floor Coverings					
<ul style="list-style-type: none"> <li>✓ Current usage per room</li> <li>✓ Future use per room in case of renovation</li> <li>✓ Reason for change &amp; barriers</li> <li>✓ Material image/Customer satisfaction</li> <li>✓ Purchase criteria</li> </ul>			<ul style="list-style-type: none"> <li>✓ Aided / Unaided</li> <li>✓ Superior / Inferior Brand</li> <li>✓ Brand image</li> <li>✓ Brand use / Potential Set</li> </ul>		

# Who changes has reasons, who remains faithful also

Scheme of inquiry current use, future use & reasons for change, barriers to change.

Buying- / Usage Behavior

## Survey current usage



## Survey future usage



## Reasons for change

- Analysis of motives and barriers to switching
- Analysis of possible differentiation possibilities
- Example evaluation:
  - **Ceramic - stone:** *high quality, long living,*
  - **Textile - Parquet:** *more hygienic, high quality*
  - **Laminate - Laminate:** *high-quality appearance, inexpensive*

A detailed survey of current and future usage for each room and the reasons for or barriers to change yields extremely valuable insights into motives market drivers and long-term trends!

# The IC Customer-Insight® provides you with answers to...

Evaluated topics within the scope of the survey

Buying- / Usage Behavior

BRANDS	
Brand Awareness	Which laminate flooring brands come to mind spontaneously? Which of the following laminate brands do you know?
Brand Image	Which characteristics would you assign to brand XY?
Superior / Inferior Brands	Which brand would you buy if money was no object? Or which brand would you definitely not buy?
etc.	What brand is your current laminate flooring from? Have you ever seen catalogs/advertising material from brand XY? etc.)

BUYING DECISION	
Where is information obtained? How are individual information channels evaluated?	Source of Information
Who makes the decision and how strong is the influence on the purchase decision?	Decision Maker/ Influencer
Which criteria are decisive for the purchase?	Buying Criteria
Price sensitivity, relative price awareness, etc.?	etc.

# Five price types with very different behavior

Customer segmentation based on price types

Price Types



## Bargain-Buyer

Interest in special offers, special rates, discounts and bonuses. Buys because of, rather than in spite of the price and sometimes even buys pointless things just because they are cheap and that in all price ranges.



## No-Risk-Buyer

Loss-averse buyers – increasingly see the risk of purchase they want avoid. Avoidance strategies: personal advice, fair price, active information gathering.



## Brand-Loyal Buyer

Has price idea, but is very open-minded for brand, image and quality. Compares products, not so much the prices, and is eager to innovations. Often spends more than planned.



## High-Risk Buyer

Little interest in price negotiations or discounts, what counts is the brand's promise of quality. Prices are disregarded as long as the overall experience is right. Quality has its price.



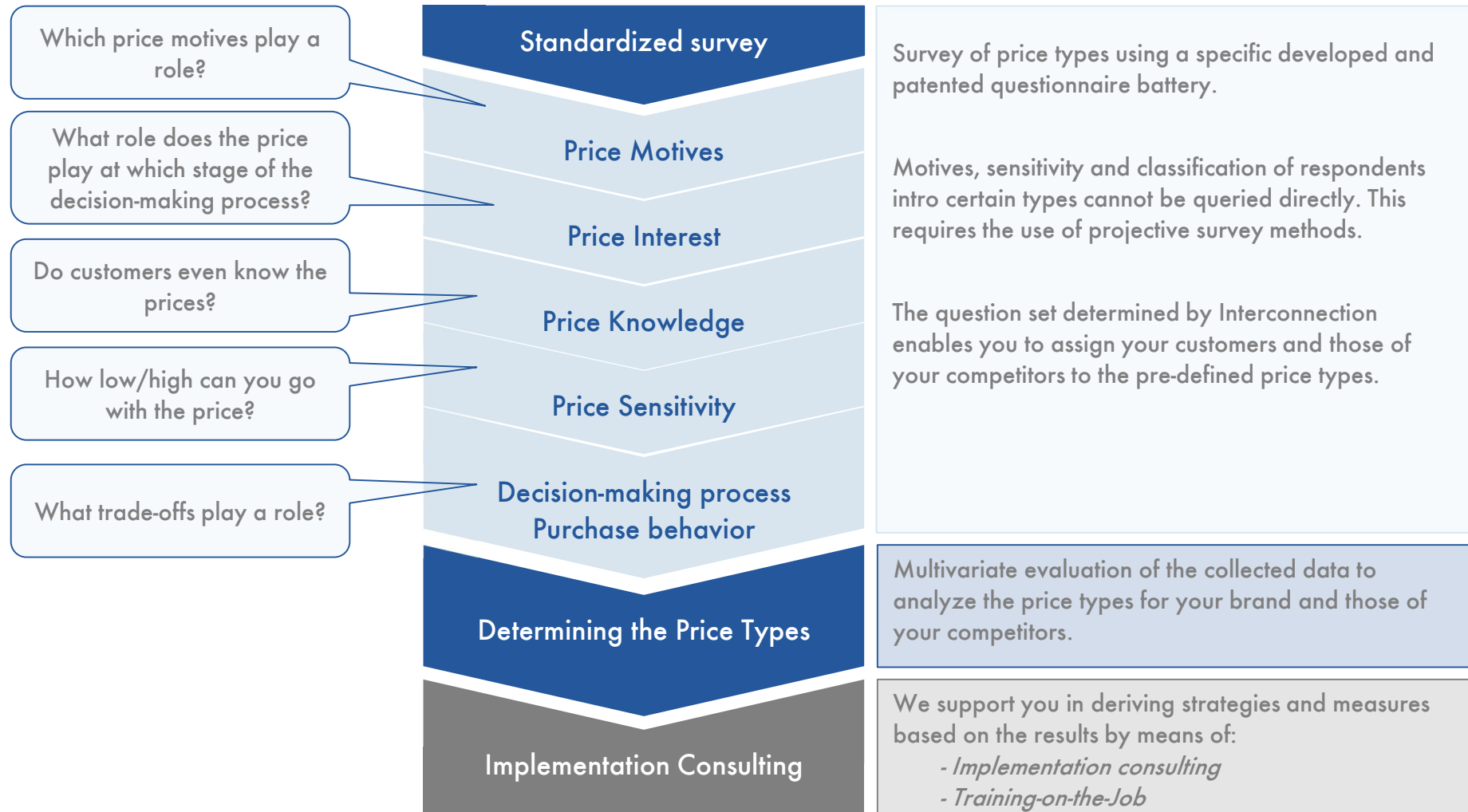
## Low-Interest Buyer

Very unemotional. Sees himself as well informed and buys to satisfy a current need. Little interest in prices and virtually no price comparisons.

# The methodology behind determining your price types

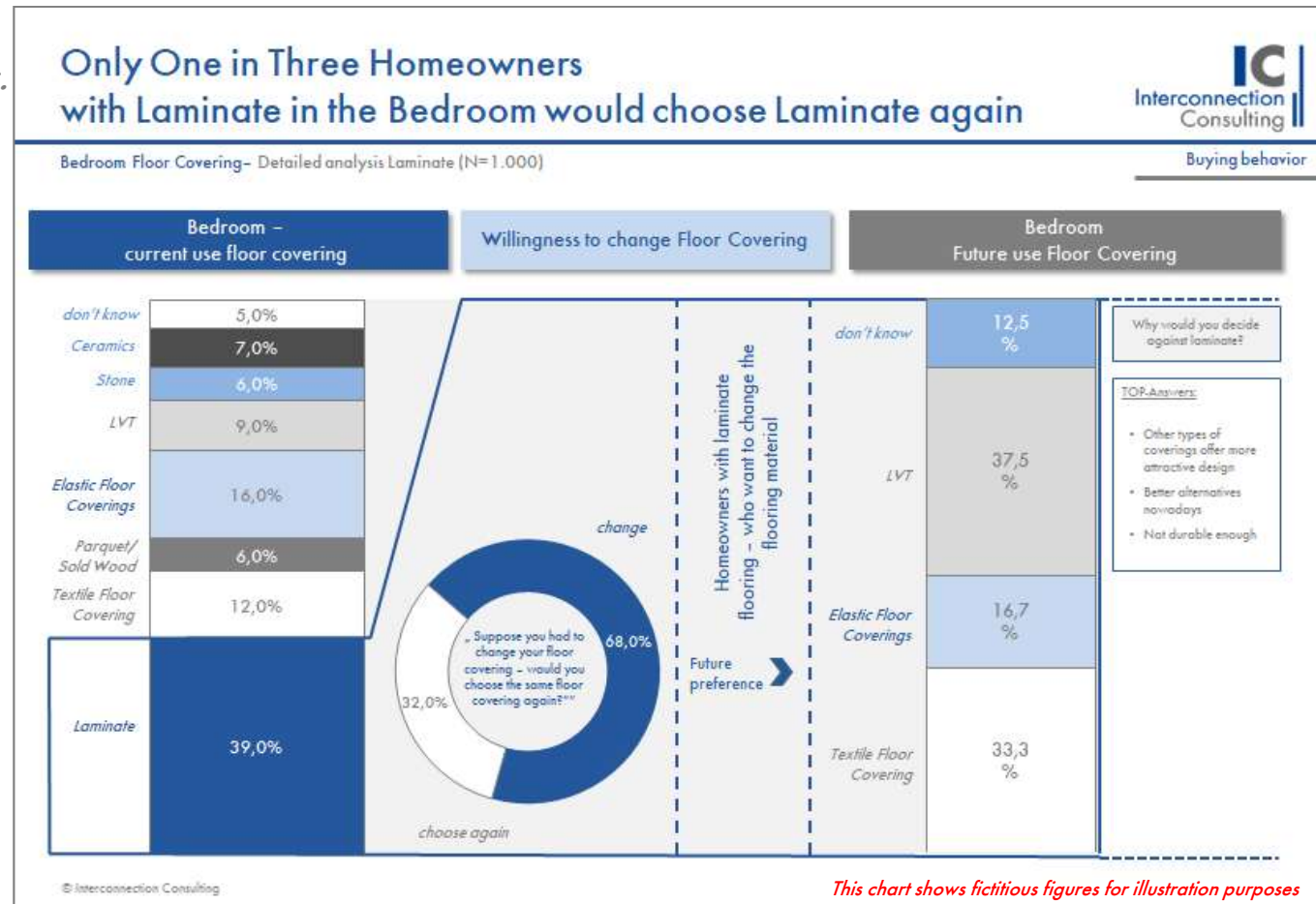
Patented survey to determine the price types

Price Types



# What is the percentage of the different floor coverings per room?

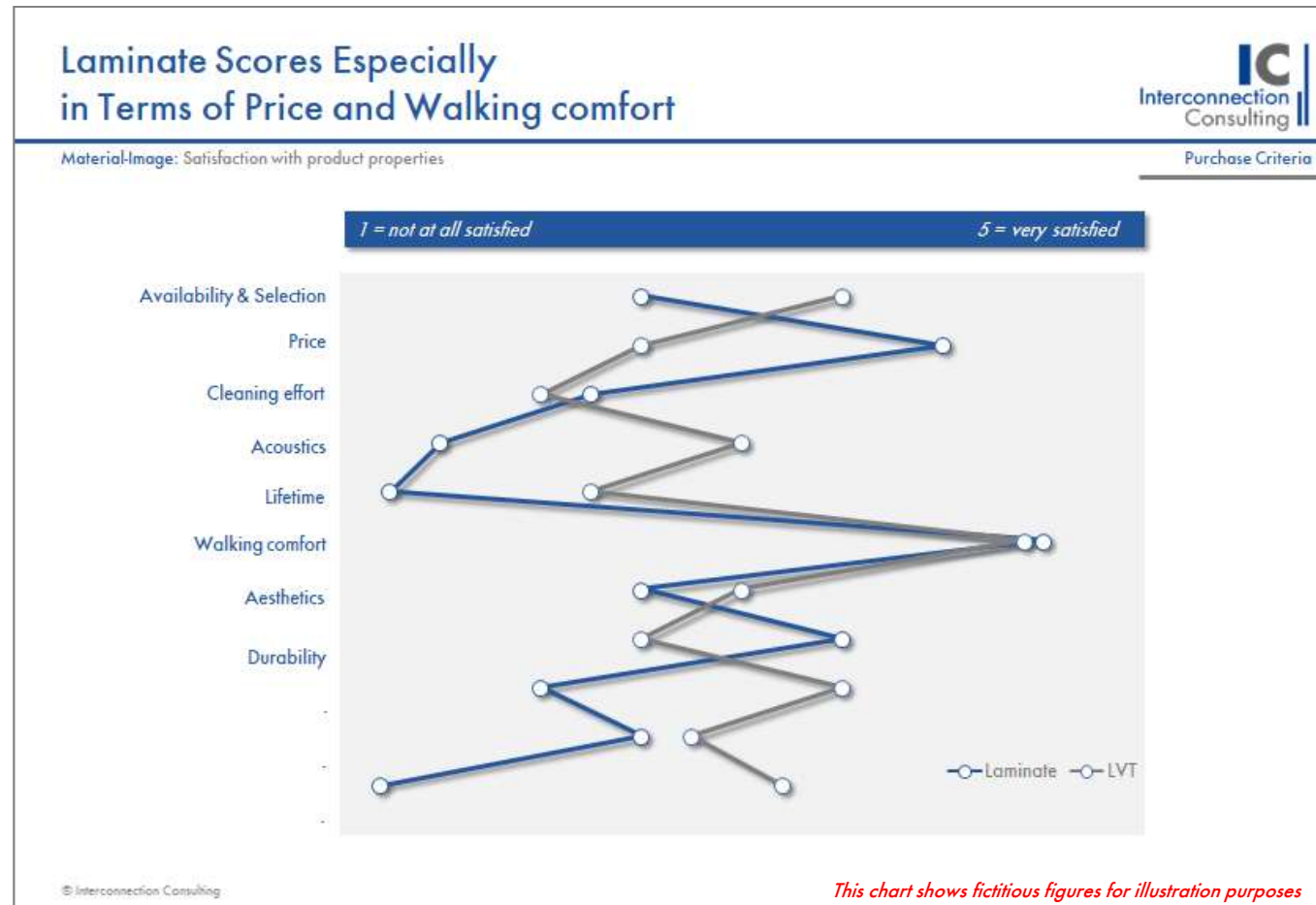
- Analysis of the proportion of different floor coverings in individual rooms (bedrooms, living rooms, etc.) as well as future customer preferences and purchasing criteria/barriers.
- *This example chart shows fictitious numbers.*





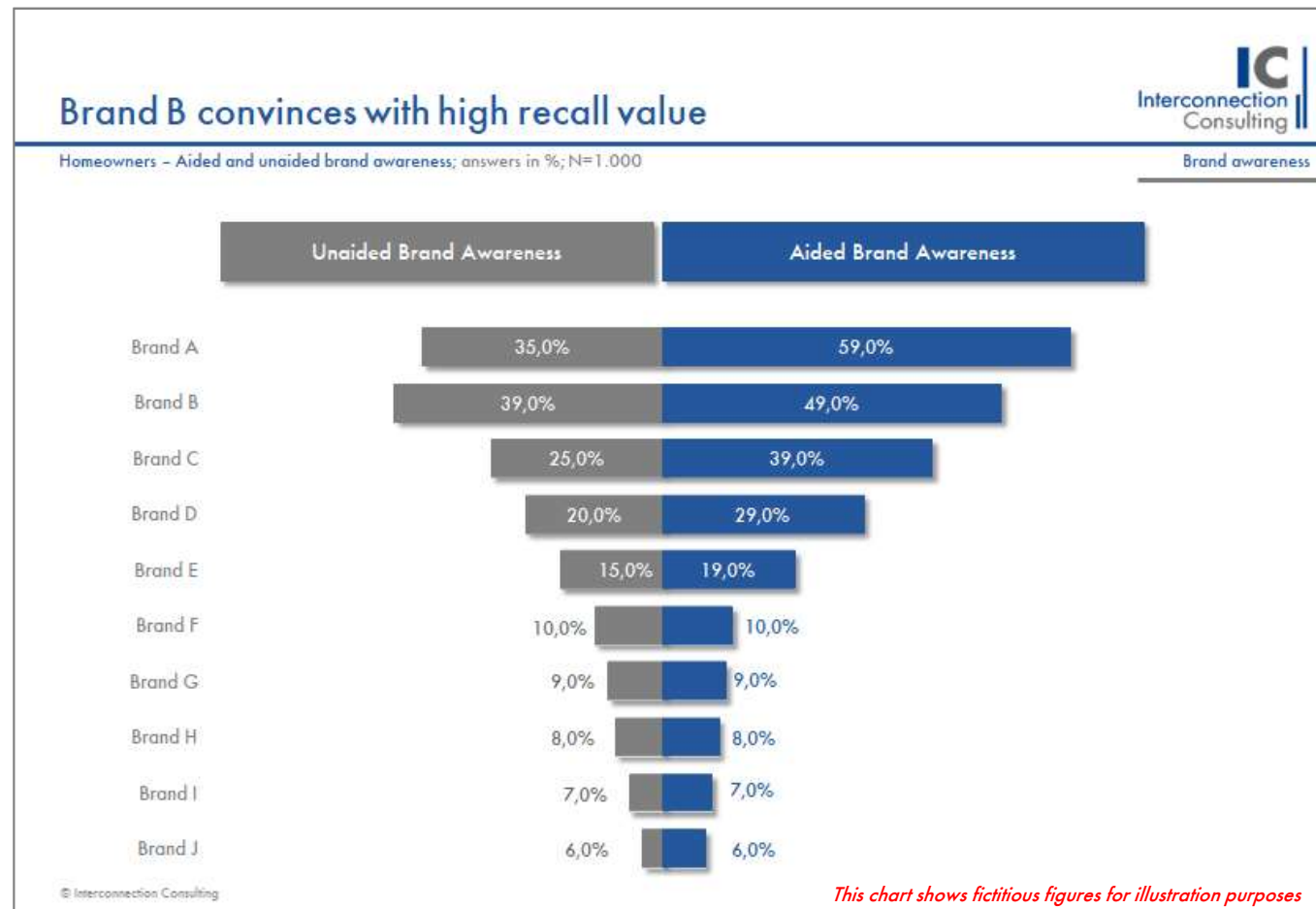
# How satisfied are customers with laminate or LVT flooring?

- Analysis of customer satisfaction and material image of individual floor coverings used.
- *This example chart shows fictitious numbers.*



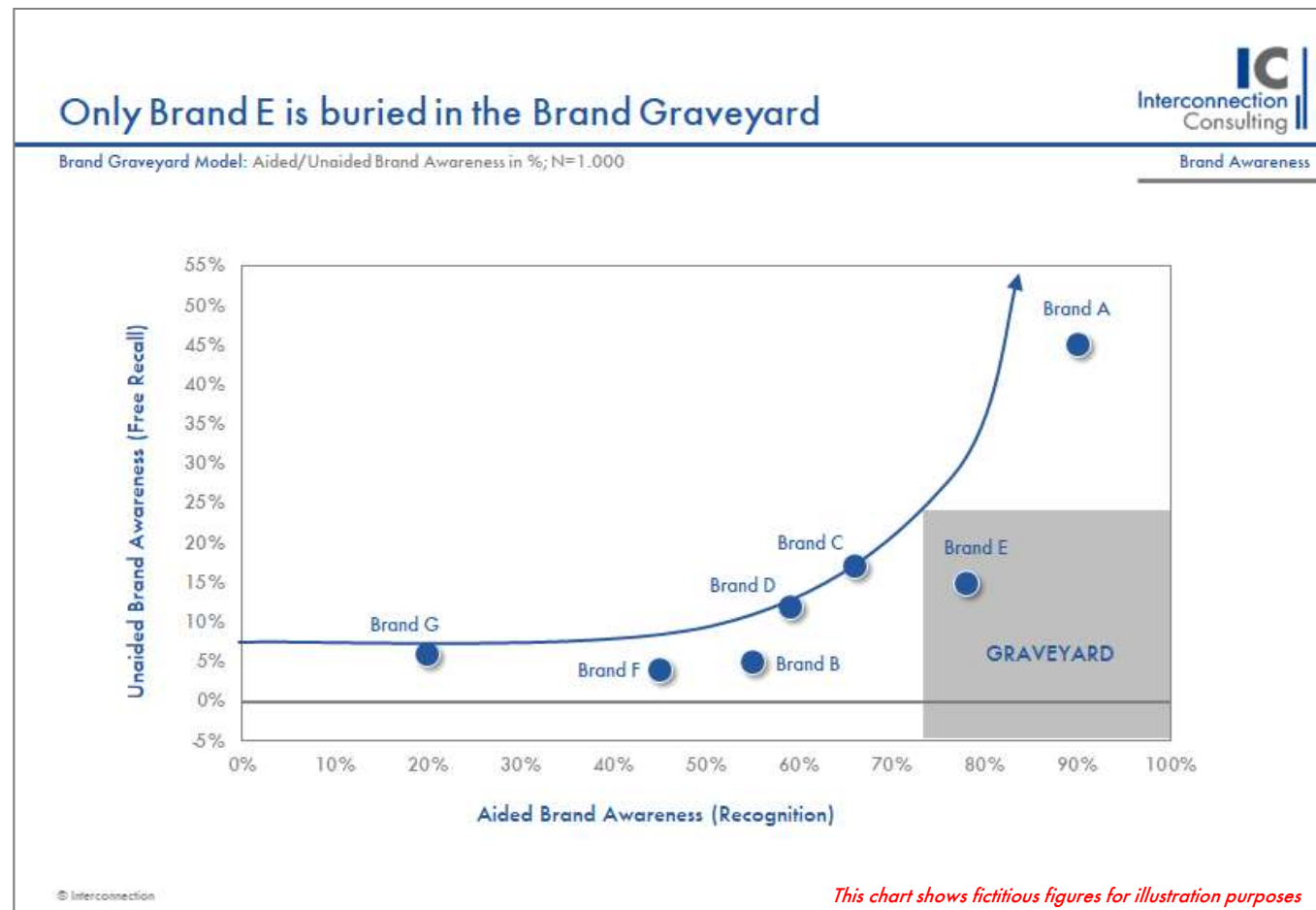
# Brand Awareness Analysis of the TOP Brands

- Classic analysis of brand awareness according to recall and recognition values.
- *This example chart shows fictitious numbers.*



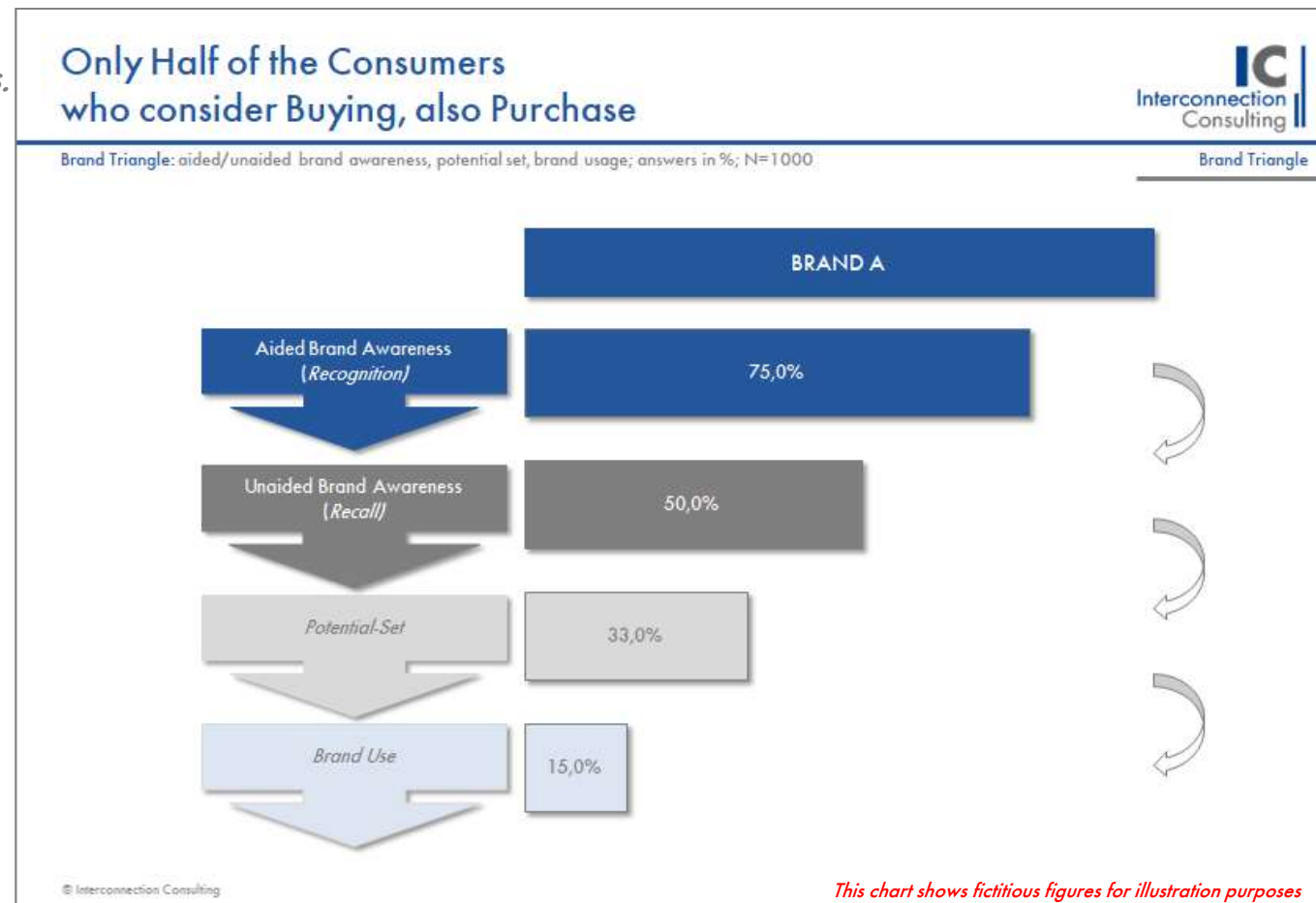
# Which brand is located in the Brand Graveyard?

- Strategic analysis of brand equity using the Brand Graveyard Model.
- *This example chart shows fictitious numbers.*



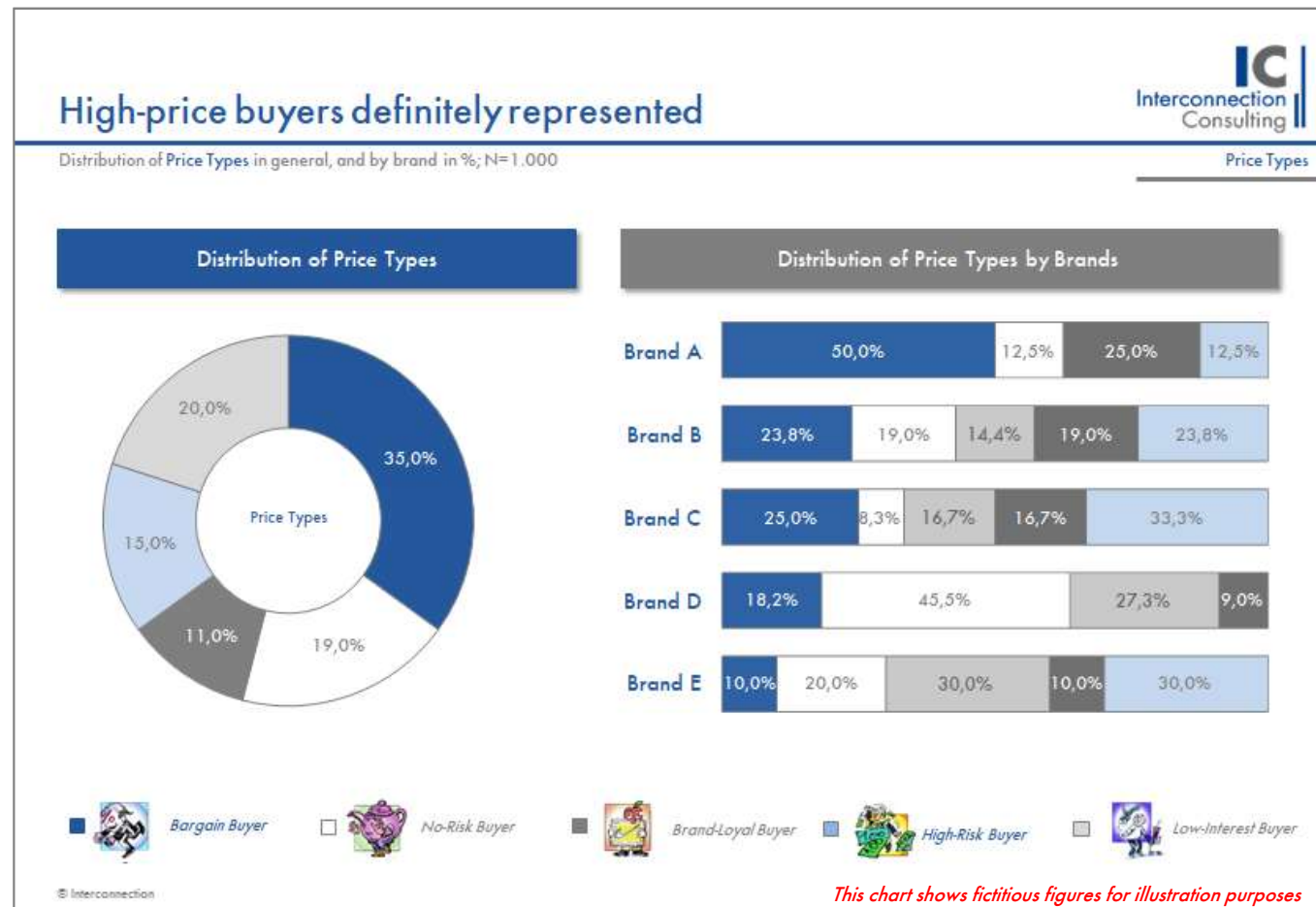
# Analysis of the Brand Values of the TOP Brands

- Analysis of brand awareness based on aided and unaided awareness as well as inferior and superior brands, potential set and actual brand usage.
- *This example chart shows fictitious numbers.*



# Price Types – Customer Segmentation based on Consumer Price Behavior

- Analysis of the five price types for floor coverings in general, as well as specific to individual brands.
- *This example chart shows fictitious numbers.*



# Investment plan around Customer Behavior in Floor Coverings

IC Customer-Insight® Floor Coverings	IC Subscription*	IC Single Issue
Floor Coverings in GER 2022 Online Survey (N=1000)	€ 5.900,-	+25% for Single Issues

\*IC Subscription: 25% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31<sup>st</sup> of December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before the 31<sup>st</sup> of December.

Price includes an interactive PDF in electronic form. All prices shown exclude sales tax.

# Your Advantages as a Subscription Customer

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Subscription\*  Single Issue

*As a subscription customer of the 'Floor Covering-Insight report', you will receive the chosen report automatically at a reduced price upon publication of a new issue. Additionally you have access to the following benefits:*

- **20% price advantage** for IC Standard Subscription compared to single issue
- **Updated reports** every year on fixed dates
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- **Flexible subscription packages:** Alternating countries, product change, etc., if possible. Conditions on request.
- **Easy termination:** After 2 issues each subscription can be terminated easily

# Selected References

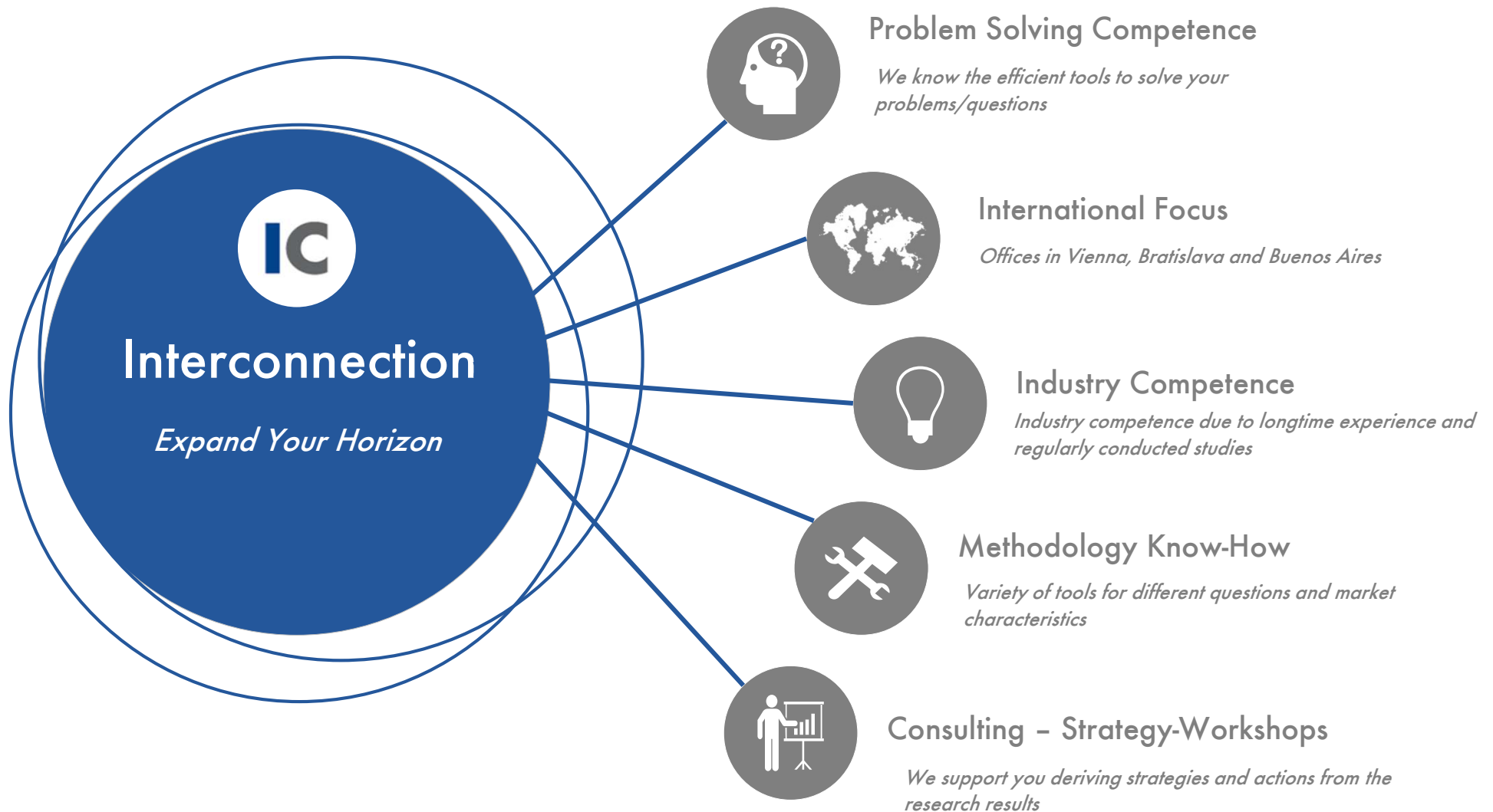
*„Long experience and deep understanding of construction markets define the quality of IC Studies.“*

Mr. Bernd Blümmers  
General Manager, Saint-Gobain Solar Systems Central Europe





# Interconnection Provides Data for Corporate Decisions



# Our Market-Intelligence Tools



# Contact Information

If there are any questions please  
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Customer Insight® Floor Covering 2022

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