

IC Market Tracking
Sport Floor Coverings
2018

- ✓ You will receive an overview of the **overall market** in addition to **individual market segments**.
- ✓ A detailed **representation of the key markets by country and forecasting until 2021** based off of our econometric forecast model.
- ✓ A **competition analysis** containing detailed **market shares** for selected regions in terms of:
 - The total market
 - Application
 - Product groups
 - Distribution channels
 - Business Segments
- ✓ Graphic representation, interactive charts and tables which allow for rapid application and utilization of the provided data.
- ✓ Company profiles for regions, where competition analysis is not available



Special Flooring Total Market - Region

United Kingdom + Ireland



	Product Groups	Application Type	Distribution Channel	Business Segment	Sport Elasticity
	Sport Vinyl	School Gyms	Craftmens & Specialists	New Construction	Point
	Linoleum Floors	University/Sport Arenas	Direct (Online..etc)	Renovation	Area
	Vulcanized Rubber	Weight/Lifting Rooms	Others - Indirect		Combi
Laminate	Parquet/Wood Floors	Indoor Tennis Courts			Others or N/A
Real Wood		Special Courts & Centers			
	Portable	Multifunctional Arenas			
	Fixed/Performance	Others			
Solid	PVC Based Flooring				
Engineered	Others				

* Some of the segments, might be merged or not displayed, if market specifics, or data collection will not allow a proper display

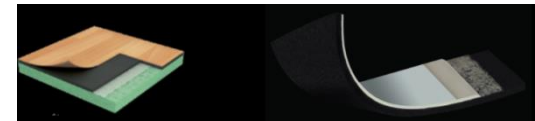
Analysis of the market by each of group including past and forecast development - 2014 to 2021. Competition Analysis for 2016 & 2017, with the notion, that in case of small number of players or untypical markets or categories, these can be replaced by company profiles. Additional soft info included based on the survey.

Turnover in Euros, unless stated otherwise. Values are always net turnovers (no list prices), including rebats

Product Groups

Sport Vinyl

Vinyl and Poured Urethane (PU) based sport flooring



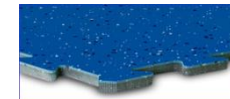
PVC

PVC and sub PVC types sports flooring



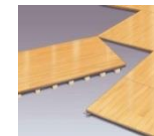
Vulcanized Rubber

Rubber floor used for indoor track and field, gyms, but also for gym floors, could be also silicone based



Parquet/Wood Floors

Floors made from the real wood and laminate – either fixed (anchored, raised or laid) or portable for easier manipulation and customization



Others*

Other special types of fixed carpets or solutions for the floors – f.e indoor turf, carpet turf..etc

* Not counted – concrete floors, indoor gravel, real grass solutions

Definition and Demarcation

Sport Elasticity

Point

Point sport floor elasticity refers to the type of flooring which absorbs the shock identically across all its parts

Area

Area sport floor elasticity refers to the type of flooring which disperse the energy of the force across larger area

Combi

Combi sport floor elasticity refers to the type of flooring which combines the function of point elasticity and area elasticity into one

Application Type

School Gyms

School area for gymnastics and athletic.

Weight/Lifting Rooms

Rooms containing the equipment for weight training

University/Sport Arenas

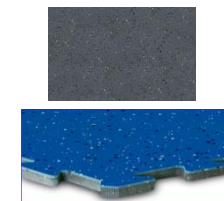
With the capacity of seats at least of 1.500 (Otherwise counted as a school gym)

Special Courts & Centers

Specialized halls, for table tennis, squash, martial/fighting arts (where applicable)..etc.

Multifunctional Arenas

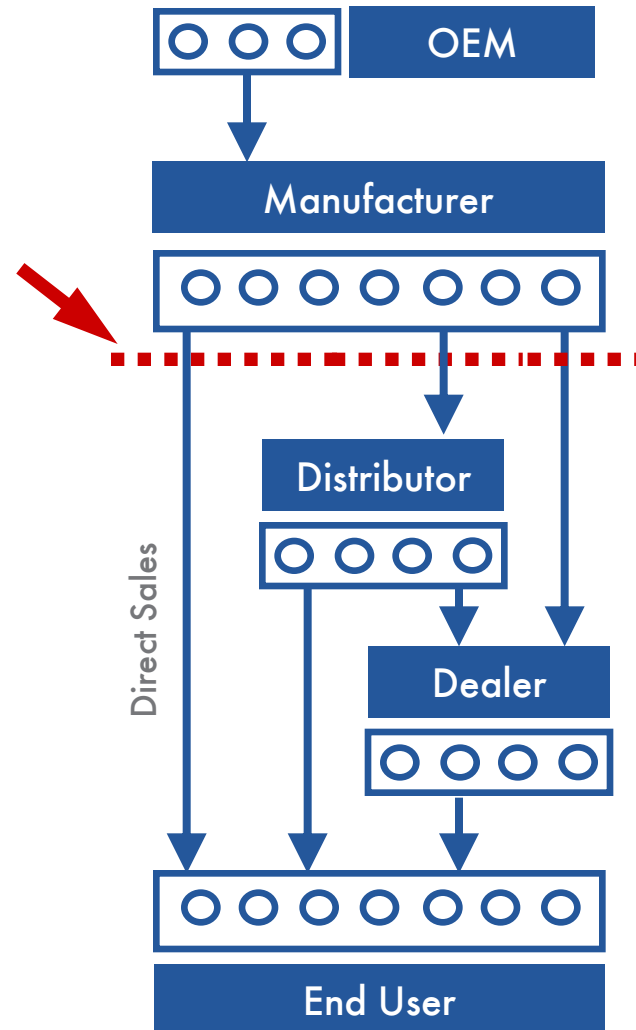
Big city stadiums, with large capacities and ability to accustom different floor types for different occasion – f.e ice rink, basketball court...etc



What Do We Measure in Our Reports?

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

Sales are segmented by the first distribution partner.



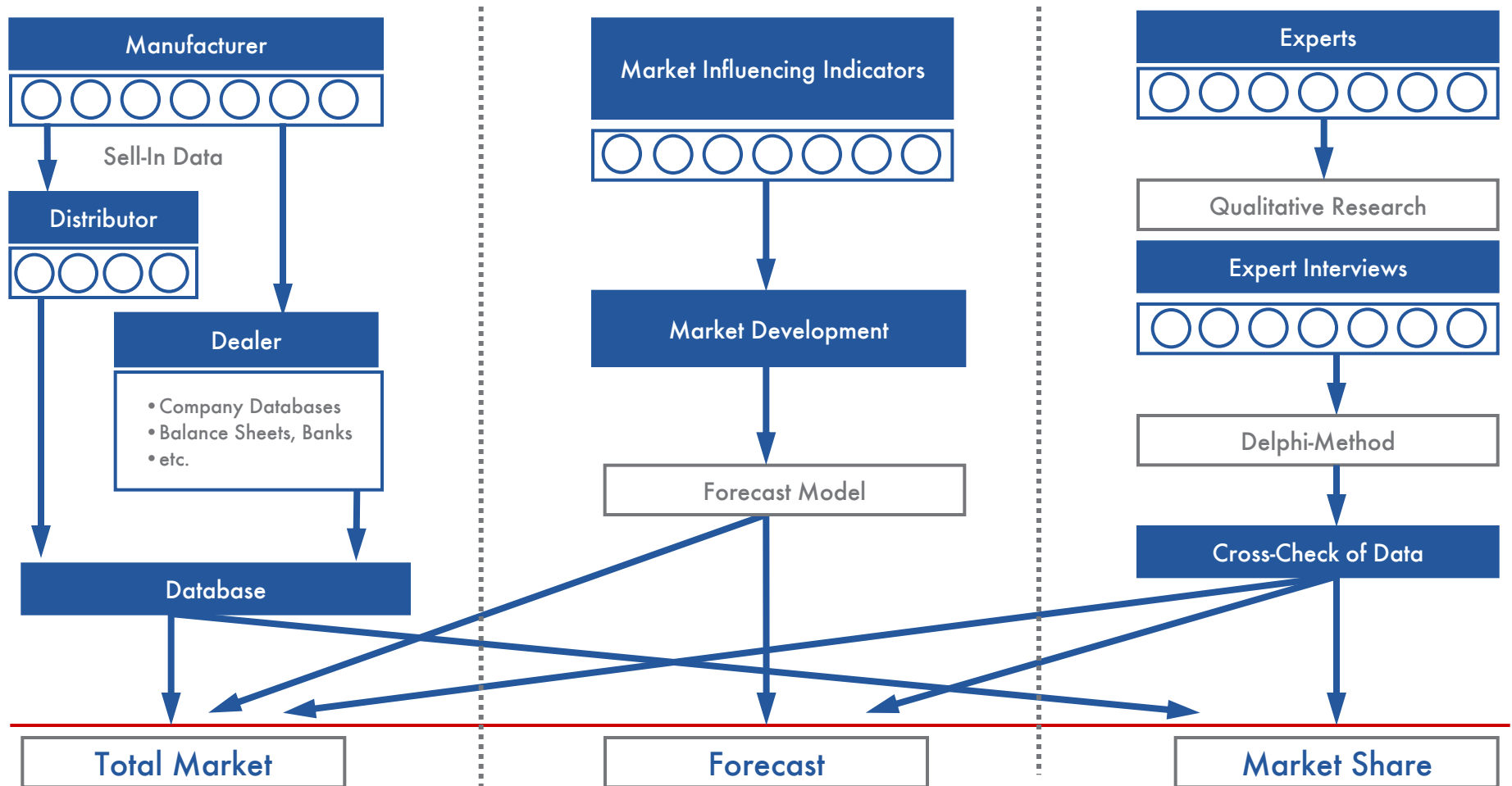
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Interviews with distributors and specialised dealers act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.

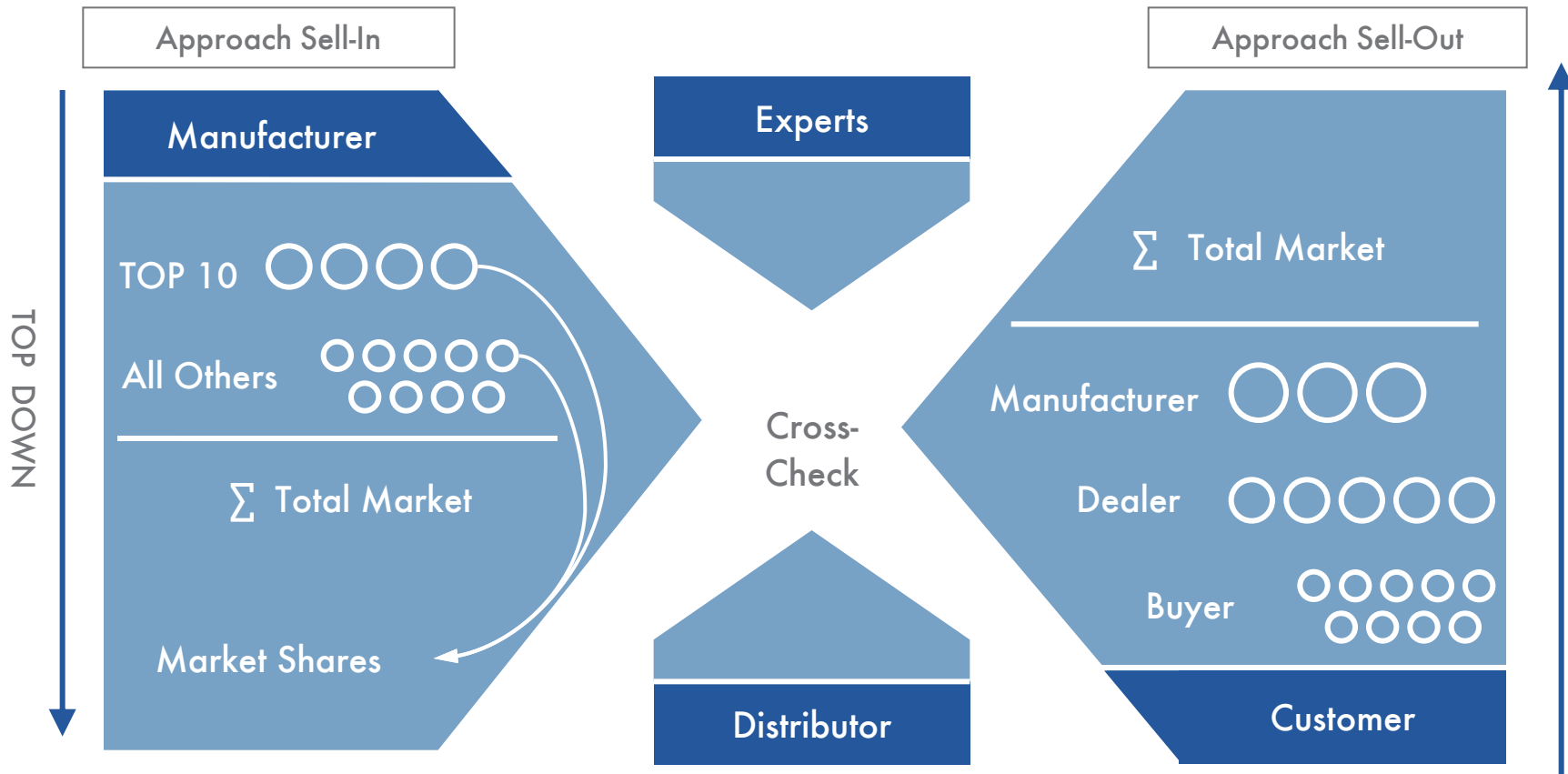
How Do We Conduct Our Research?

Description Structure of Survey Methodology

Methodology



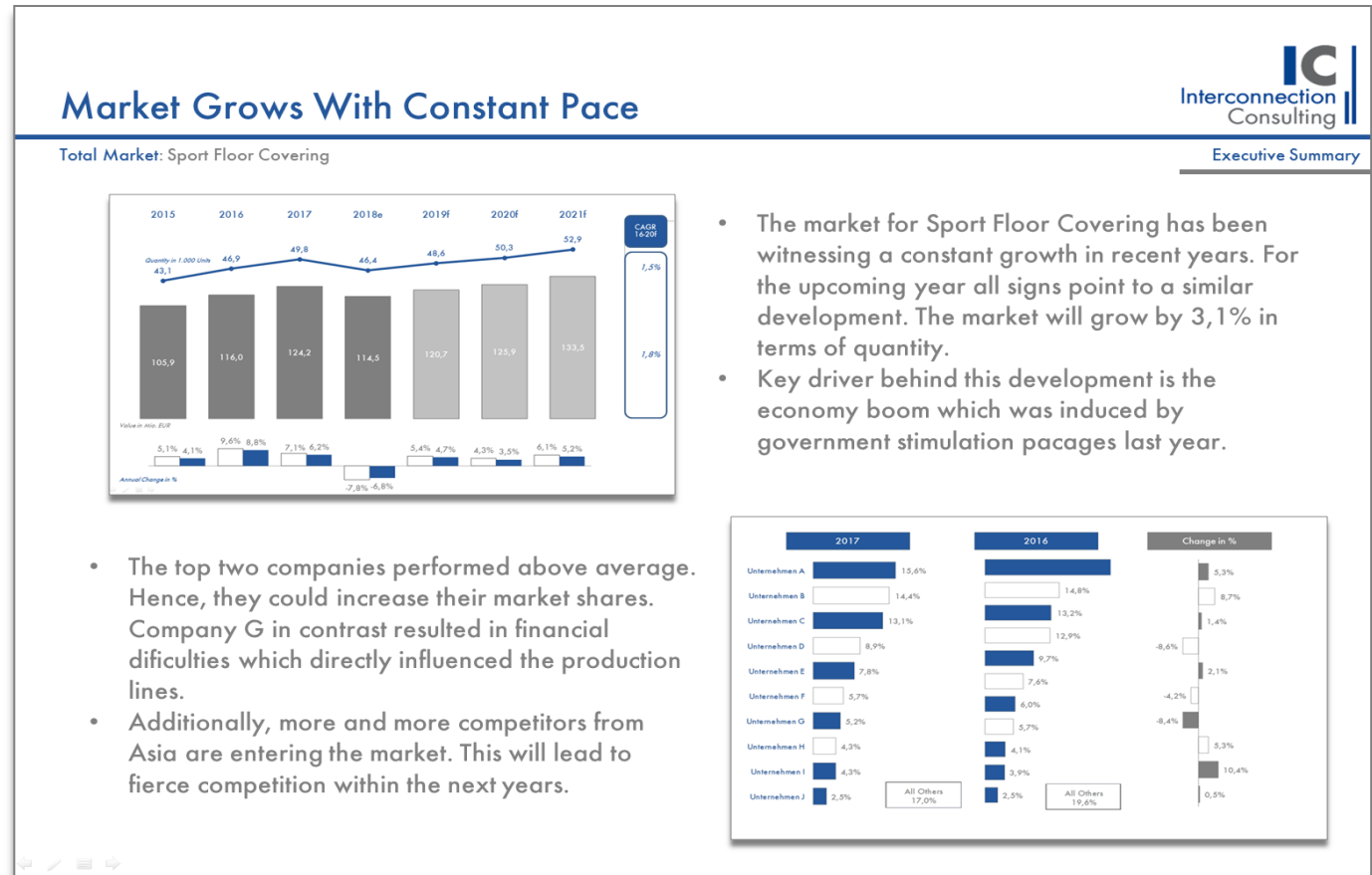
How Do we Cross Check the Data?



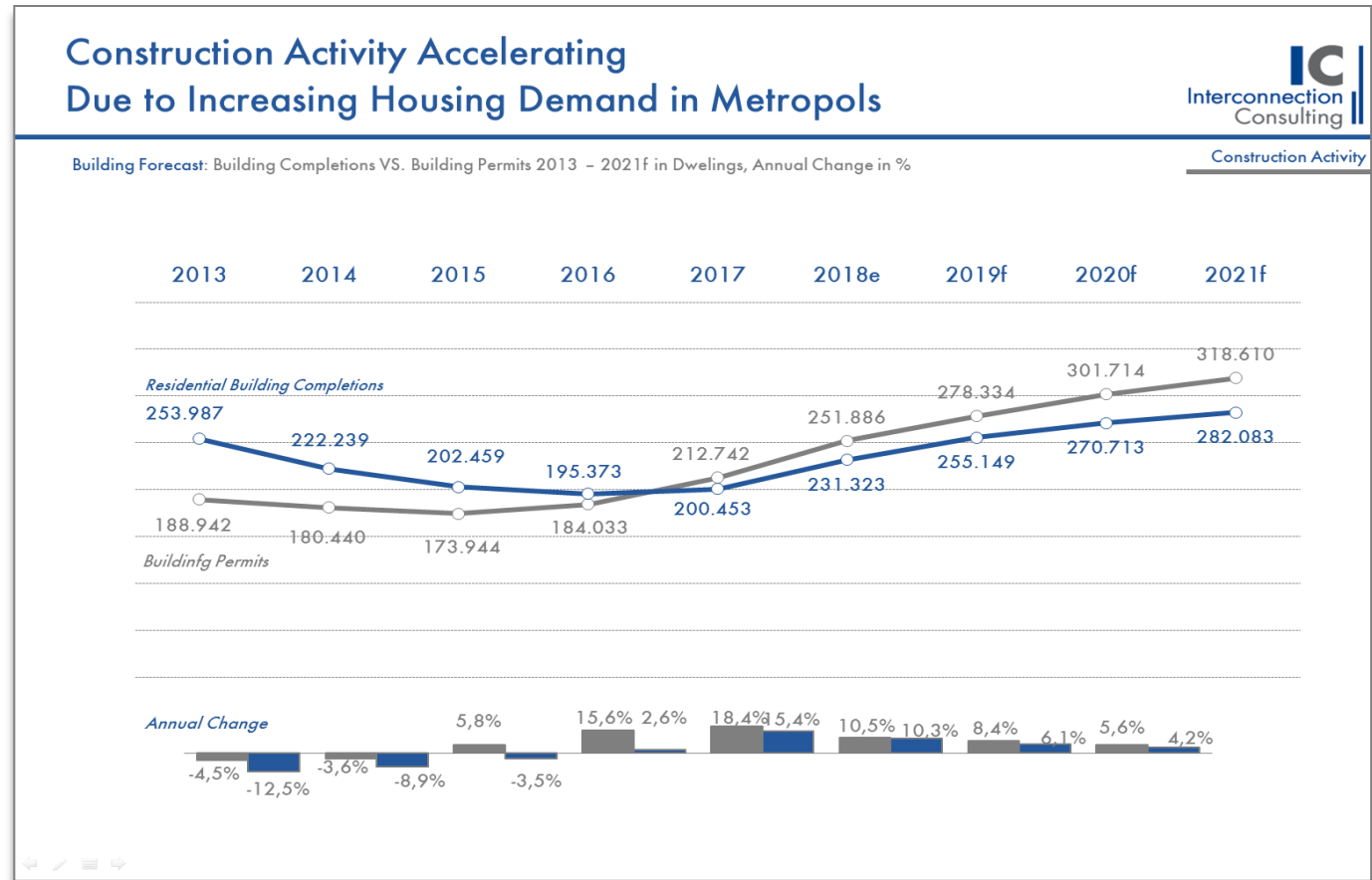
The IC Market Tracking® is modularly built and consists of the following sections:

- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market are analysed in the **Economic Environment**: You will find the most important data on consumer behaviour, main economic indicators, etc.
- The **Total Market Analysis** shows the development of the market surveyed by value and quantity in different dimensions, such as regions, product groups, and ways of distribution. A forecast for the next years is an essential part of this analysis.
- The **Competition Analysis** shows in detail the development of the top companies in the market by finding out about the market shares in different categories, changes in market position, benchmarks, average prices, etc.

- The executive summary comprises all relevant information of the report in precise manner. Forecast and
- competition situation is highlighted
- *This chart shows dummy figures.*

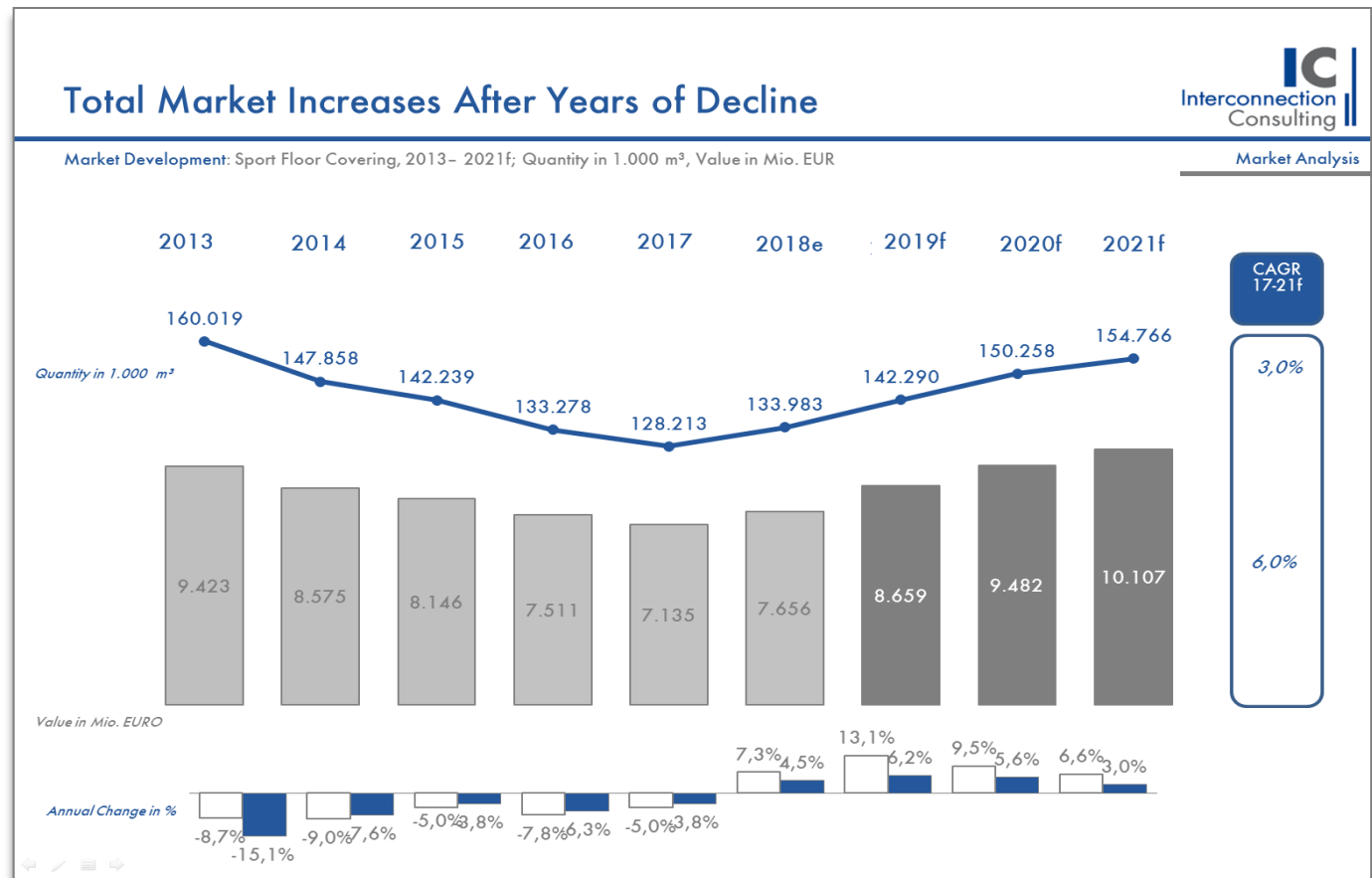


- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.
- *This chart shows sample figures.*

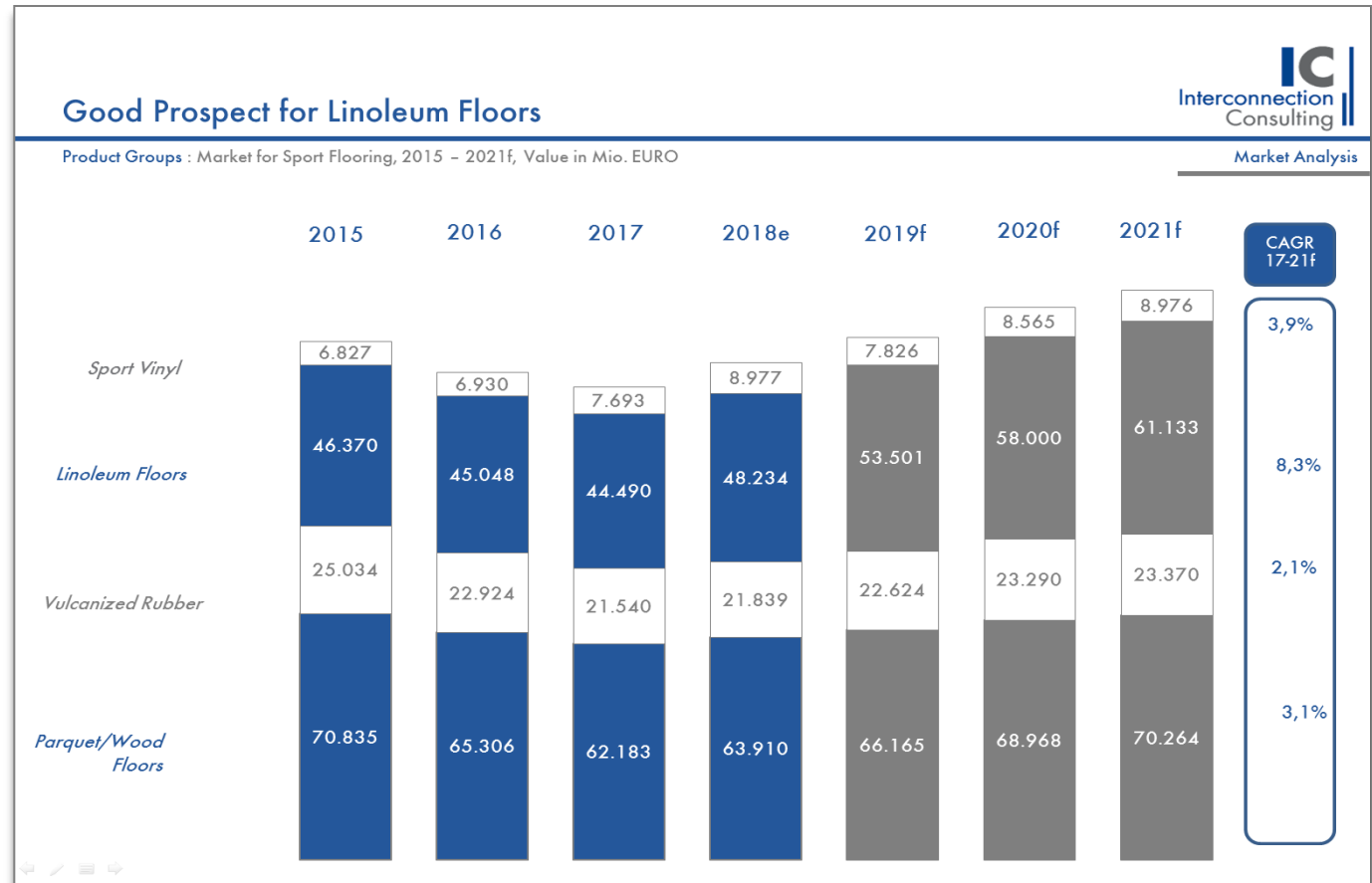


Total Market Development and Forecast

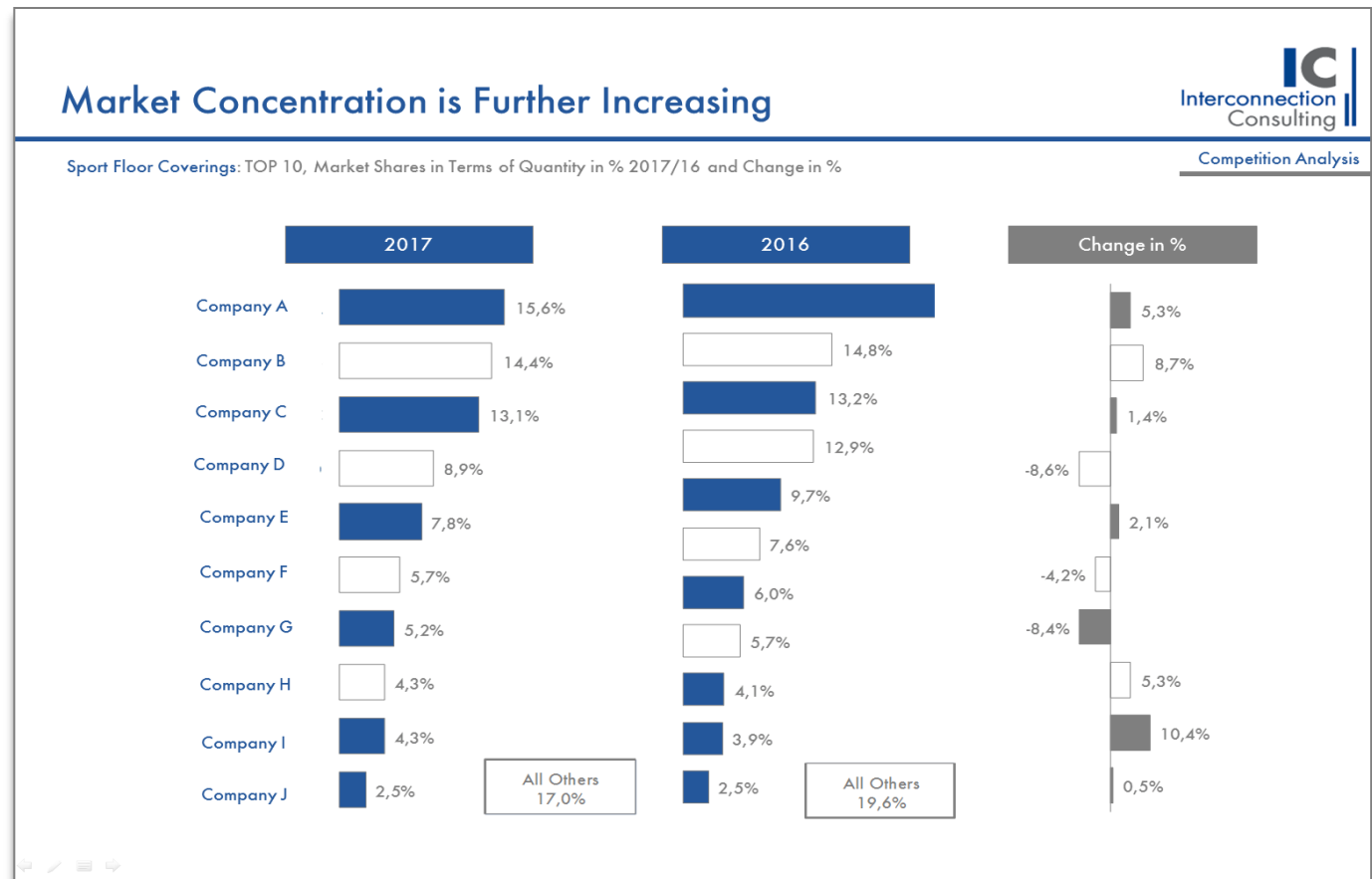
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- *This chart shows dummy figures.*



- Overview of the Product Group Segmentation, Distribution Channels as well as a Forecast for the upcoming three years about their development.
- *This chart shows dummy figures.*



- Detailed description of the most important Companies in the examined market by reference to market shares, changes, BCG-Portfolios, etc.
- *This chart shows dummy figures.*



- In addition to the visualized report a Pivot Table will be included.
- This tool allows individual and selective analyses to be made by the user with the available data, especially when it comes to future trend and segmentation modeling.
- Pivot tables are available for the competition analysis as well as for the total market and forecast studies.

How to use Pivot Tables

1. Generally, the desired sub-categories (i.e. Technology - A) can be selected with the ordinary drop down menus.

Technology	A
Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
∅ Price in € (Classes)	(All)


Sum - #	
Segments	Results
Segment A	18.592
Segment B	8.434
Segment C	5.310
Segment D	3.290
Segment E	1.332
Total	36.958

2. If you want to analyse a different category (i.e. Technology), click on the gray field and drag it down to the table.

Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	Technology		
Segments	A	B	C
Segment A	3.290	5.452	7
Segment B	5.310	8.925	21
Segment C	8.434	10.794	
Segment D	18.592	14.624	13
Segment E	1.332	2.229	6
Total	36.958	42.025	47

Investment Plan for Your Market Research

	Single Issue	IC Subscription*	Scale of Discounts	
Single Country/ Region	€ 5.450,-		€ 7.000	-10%
			€ 10.000	-20%
			€ 14.750	-25%
			€ 23.600	-33%
			€ 34.400	-40%

Available countries

United Kingdom + Ireland

Others on Demand

* **IC Subscription:** 20% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st 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 31st December.

****Price Special** (scale of discounts are not applicable, subscription applies)
Price includes an interactive PDF Document. All prices shown exclude sales tax

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As a subscription customer, you will receive the chosen report automatically at a reduced price from now on as soon as the new edition of the report is published. Additionally you have access to the following benefits:

- **Price advantage** IC Standard Subscription (annual receipt of an IC study or IC study package): **20% price advantage** compared to single issue taking into account the **scale of discount**
- **Annually updated reports** on fixed dates
- One time a year **free web conference** with the Analyst of the report (presentation of key results, background information, answering of questions)
- **Info-Hotline**: answering of questions with regards to the report and on methodological issues relating to market research
- **Flexible subscription packages**: 2-year intervals, alternating countries, product change, etc., if possible. Conditions on request
- **Easy termination**: After 2 issues each subscription can be terminated easily


Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the flooring industry.
- Our studies support the leading companies in defining targets and marketing strategies, including competition monitoring and control of marketing actions.
- Interconnection draws its Know-how from over 100 international market studies per year and a number of Ad-hoc studies in several industries.
- Next to market data we offer for the construction branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also when it comes to translating data into actions, i.e. the development of marketing strategies.



Our Market-Intelligence Tools

Market Analysis




- Market Volume
- Market Shares & Entry
- Competition Analysis

Distribution Analysis



- Channel Map
- Distribution Matrix
- Margins

Customer Insight




- Focus Groups
- Buying Motives
- Customer Benefits

Market Forecasts




- Indicator Models
- Life Cycle Models
- Econometric Analysis

Brand Analysis




- Brand Scorecards
- Brand - Triangle
- Brand Affinity

Customer Satisfaction




- Importance/Satisfaction Portfolios
- Customer Loyalty
- Customer Typology

Price Research



- Price-Sales-Function
- Price-Simulation-Tool
- Optimal Pricing

Web**verstärker**



- E Commerce Insights
- Search Engine Marketing
- Web Channel Analysis

"IC is a permanent partner of ours and provides helpful data for decisions."

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe



**If there are any questions please
do not hesitate to contact us!**

Interconnection Consulting

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we show you the way

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 80/ per Country
- Optional: Hard Cover: 150 €

Price

- Single Country: 5.450,-€

Detailed Information about special offers, scale of discount as well as subscription prices are presented within the order form or the interactive price calculator.



Options of ordering – Fax:+43 1 5854623 30

- Click „Buy Now“ on the website and make your order with the interactive price calculator.
- Print out your order form (at the end of the “Full Details” document and fill in your data.

Content of the Market Report

Structure of the Study

Language of the report

English, German on Request

Introduction, Market Structure & Executive Summary Definition and demarcation of product groups, regions and methodology; summary of study results

Market Drivers

Key economic factors influencing the market: consumer behaviour, main economic indicators etc.

Import & export statistics

Total Market Analysis

Total market development and forecasts for all market segments in quantity and value by regions, product groups, business segments, customer segments, distribution channels and opening types.

Competitive Analysis

Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each application for the last two years.

Market Structure

Region:

United Kingdom + Ireland

Product Groups

Sport Vinyl, Synthetic Floors, Vulcanized Rubber, Parquet/Wood Floors (Portable, Fixed/Performance), Others

Application Type

School Gyms, University/Sport Arenas, Weight/Lifting Rooms, Indoor Tennis Courts, Special Courts & Centers, Multifunctional Arenas, Others

Distribution Channels

Craftmens & Specialists, Direct (Online, etc.), Others - Indirect

Business Segment

New Construction, Renovation

Methodology

Methodology and Data Sources

The market and competitive analysis is conducted through interviewing the most important manufacturers in the respective industry. All data are cross-checked for plausibility and evaluated by means of additional sources of information.

The market models and forecasts are based on economic indicator models, which are developed individually for each market. The influencing factors are analysed by means of multivariate regression analysis and updated each year.

The economic indicators and environmental data are a result of secondary research of prestigious statistical institutes and are supplemented by internal market analyses.

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E-Mail: gajdova@interconnectionconsulting.com



Yes, we would like to order the
IC Market Tracking® Sport Floor Coverings in Europe 2018
(Please, print out the order form and mark your desired products)

Industry/Region



Single Issue

UK/ Ireland

5.450,- EUR

Order Form

- Abonnement (20% Price Advantage) *
- Single Issue
- We would like to order additional hard copies, each for € 150
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From: 23.600,- EUR 33%

From: 34.400,- EUR 40%

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